

# Processing: The Next Frontier for Premium Pet Food

November 2020

Table of Contents

### INTRODUCTION

Scope

Key findings

# THE KIBBLE DISCONNECT

Dry kibble dominates the global pet food market

Ingredients and packaging have driven premiumisation trends

The evolution of premium ingredients

Consumer trends move in a different direction

The kibble disconnect

New frontiers of pet food processing

"Next-gen" wet food: humanising the feeding experience

### THE BARF REVOLUTION

Why raw?

Expanding reach: from frozen to freeze-dried

The market landscape for freeze-dried pet food

A new era of premiumisation with affordable freeze-dried solutions Home-made BARF: a potential risk to commercially-made products

### FEEDING FRESH

Why fresh?

Fresh food pioneers in stores: Freshpet Inc (USA)

Fresh pioneers in stores: The Real Pet Food Co (Australia)

E-commerce and subscription models: levelling the field for fresh food

Digital disruptors: online players in fresh pet food

E-commerce also opens new opportunities for BARF brands

### CONCLUSION

Impact of the COVID-19 pandemic Different areas of appeal A future defined by format

## **ABOUT VIA**

About Via from Euromonitor International

# About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- Strategy Briefings: Global or regional in scope, and focusing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- Company Profiles: Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- Country Reports: For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer
  trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with
  country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/processing-the-next-frontier-for-premium-petfood/report.