

From Sustainability to Purpose: Mapping the Opportunity in Pet Care

January 2021

Table of Contents

INTRODUCTION

Scope Key findings

THE SUSTAINABILITY CHALLENGE

Sustainability offers significant opportunities within pet care Trends in tension: Sustainable living and ancestral pet diets Trends in tension: sustainable packaging and pet humanisation Trends in tension: sustainable packaging and pet humanisation (cont.) Coronavirus (COVID-19): From sustainability to purpose

MARKET LANDSCAPE

Measuring sustainability in pet care: Data types and market coverage

MARKET LANDSCAPE

The state of product claims in pet care: How does sustainability stack up? The market landscape for sustainability claims The competitive landscape for sustainable pet food Who is driving the push for sustainability?

WHERE TO PLAY: PET CARE SUSTAINABILITY INDEX

Methodology: a three-pronged approach to market measurement Pet food product claims: tracking digital share-of-shelf Pet owners: reported green behaviour and trust in labels The "green macroenvironment": Euromonitor's sustainability index Where to play: Scoring markets for opportunities in sustainable pet care Where to play: mapping the opportunity in pet care sustainability White spaces: high-potential markets with low penetration rates

HOW TO WIN: INNOVATORS IN SUSTAINABILITY

Leading players: Nestlé Purina Petcare Co Leading players: Mars Petcare Inc Disruptors in sustainability: Packaging Disruptors in sustainability: Ingredients Disruptors in sustainability: becoming a purpose-driven brand Disruptors in sustainability: becoming a purpose-driven brand

CONCLUSION

Conclusion: opportunities and challenges in sustainable pet care

APPENDIX

Pet Care Sustainability Index: methodology notes Pet Care Sustainability Index: lifestyles survey questions Pet Care Sustainability Index: standardising scores About Via Online Tracking from Euromonitor International Overview of Lifestyles Survey

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 focussing 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/from-sustainability-to-purpose-mapping-theopportunity-in-pet-care/report.