

# From Sustainability to Purpose: Mapping the Opportunity in Pet Care

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### 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

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