

June 5 – 7
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Estonia

**Michael
Bellingham**

Chief Executive
UK Pet Food Association

**Economy and Markets:
global tensions and
emerging trends**

Join at [slido.com #3705809](https://www.slido.com/join/3705809)



Pet Food Market - UK

Michael Bellingham
Chief Executive - UK Pet Food
6 June 2024

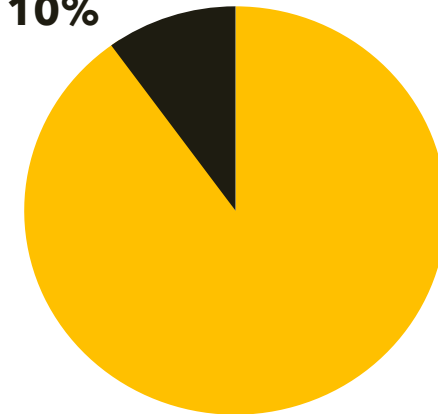
Who are UK Pet Food?

The leading trade association representing the UK pet food industry

- At current we have **105 member companies**
- This accounts for over **90%** of the UK pet food market.
- **10 Associate Members**, including retailers, packaging, PR and R&D specialist, all there to assist our members



Non-members
10%



UK Pet Food members
90%



Meet the Team



Michael Bellingham
Chief Executive



Nicole Paley
Deputy Chief Executive
(Communications & Animal Welfare)



Donna Holland
Technical & Regulatory Affairs
Manager



Sarah Hormozi
Head of Science & Education



Beth Morgan
Membership & Events Executive





ASSOCIATE MEMBER OF

**UK
PET
FOOD**



TESCO



Sainsbury's

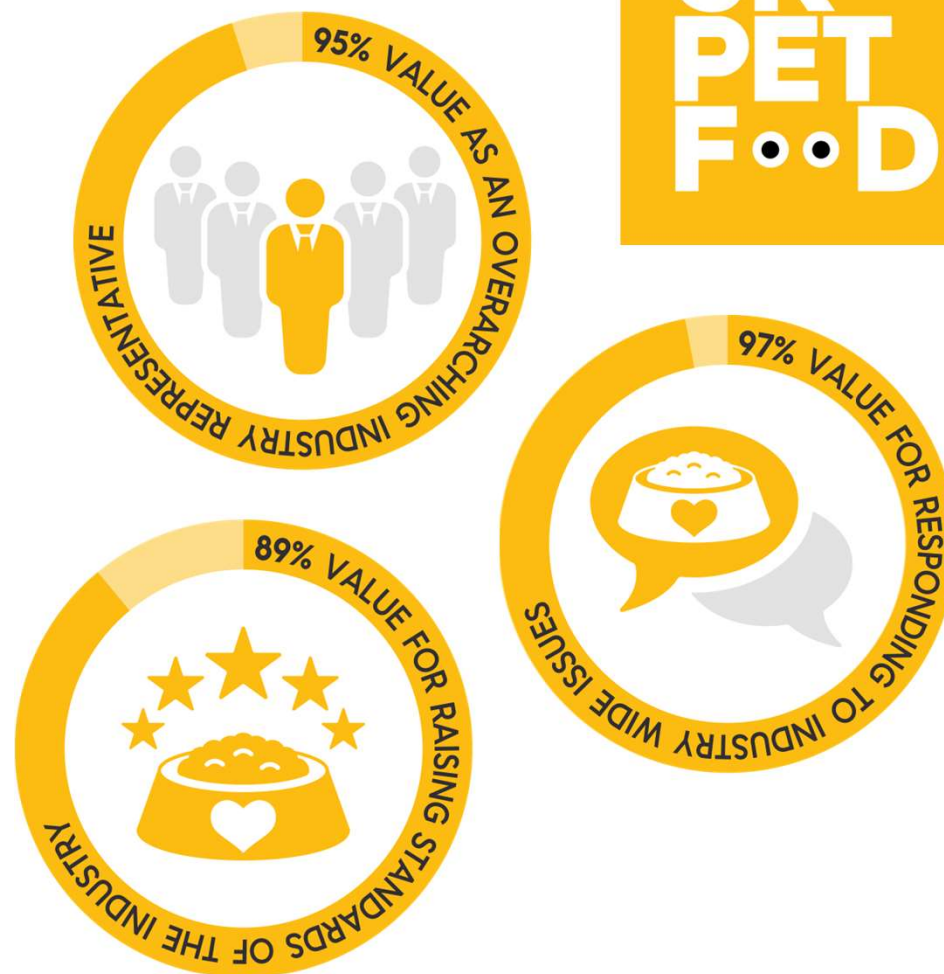


Anthesis
Enterprise Software & Services



Aims & Objectives

- Promote commercial pet food products
- Promote responsible pet ownership
- Raise standards in the pet food industry
- Represent UK Pet Food member views
- Share knowledge & keep members well informed
- Stimulate the growth & reputation of the industry



Education and Self-Regulation through Industry Guidelines & Codes of Practice

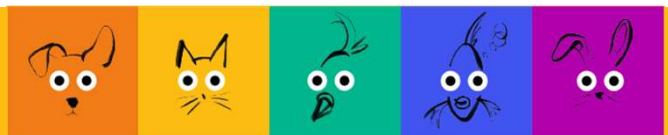


- Guide to Safe Manufacture of Pet Food
- Labelling Guidelines (communications)

- **FEDIAF Nutritional Guidelines**

- Cats and Dogs
- Pet Rabbits
- In development for fish

- **UK Pet Food Guidelines for Raw Pet Food (2017)**



Resources for pet care professionals to engage with pet owners.



UK PET FOOD PET PARROT FEEDING GUIDE

PARROTS ENJOY A VARIED DIET
In the wild the diet is enormously varied. For pet birds, a commercially formulated diet is appropriate, supplemented with fresh produce. Ensure you provide foraging opportunity to replicate natural feeding behaviours.

FORAGING BEHAVIOURS
In the wild, birds spend the majority of their time foraging for food. This behaviour should be encouraged in a captive environment, for example by scatter feeding using puzzle feeders and foraging trees. The type of equipment provided, or methods adapted will depend on the species.

FRESH VEGETABLES
Fresh produce items with low energy-density are a great supplement. Dark green, leafy vegetables are particularly good for their vitamin and mineral content. Examples of appropriate vegetables are spinach, celery, carrots, beetroot, peas, beans and lightly cooked corn on the cob.

HEALTHY TREATS
Giving healthy treats, occasionally and in small amounts, can be great for bonding and as training rewards. Small pieces of fruit such as apple, grapes, pear and banana and commercial treats with no added sugar are suitable.

FRESH DRINKING WATER SHOULD ALWAYS BE AVAILABLE

Do not feed your parrot with scraps from the table such as salty and sugary human foods. Never feed avocados, chocolate, caffeine, mushroom, MUF, sweet peas or sage. Please visit the Parrot Society's website for a list of other foods to avoid. www.theparrotsocietyuk.org/veterinaryadvice/poisons-and-parrots

Monitor your parrot's body condition score to make sure they are not overweight or underweight. You can use the UK Pet Food Bird Size-O-Meter. For further information on pet birds please visit the Pet Nutrition Hub on our website www.ukpetfood.org or simply scan the QR Code on this poster.

For more information on Indoor Bird Nutrition please scan this QR code.

www.ukpetfood.org

UK PET FOOD FACT SHEET

RESPONSIBLE RAW FEEDING FOR CATS AND DOGS

With an overwhelming minefield of information for pet owners researching suitable diets for cats and dogs, UK Pet Food can offer some key advice on feeding a raw diet responsibly.

There is also concern amongst some veterinary professionals that many homemade diets do not provide adequate nutrition.

WHAT IS RAW FEEDING?
Providing a diet of raw food for cats and dogs made up of raw meat, offal and raw bone, along with other ingredients such as fruit, vegetables, oils, nuts and seeds.

There are two types of raw feeding: homemade raw diets and commercially prepared raw diets.

COMMERCIALLY PREPARED RAW FOODS
Some members of UK Pet Food produce frozen and freeze-dried raw foods for cats and dogs with both 'complete' and 'complementary' varieties available in a range of convenient formats. These products help owners to feed their pet raw diets responsibly. The 'complete' pet foods have been specially formulated to provide the nutritional balance a cat or dog needs in their daily diet, whilst a 'complementary' pet food will need to be fed alongside another food source. The pet food label will tell you whether it's 'complete'.

WHAT ARE THE CONCERNS WITH A HOMEMADE RAW DIET?
Whilst homemade diets provide more flexibility for pets with very specific nutritional needs, they are riddled with and receive significant

UK PET FOOD THE IMPORTANCE OF HAY IN A GUINEA PIG'S DIET

GOOD QUALITY HAY/GRASS
• Should make up majority of their diet.
• Important to be available every day.
• Source of fibre for healthy digestion and teeth.
• Encourages natural foraging and grazing behaviour.

GREENS/LEAFY VEGETABLES
• Provide additional nutrients and moisture in their diet.
• Excellent sources of vitamin C.
• Add variety of textures and tastes for stimulation and enrichment.
• Can be given daily in small amounts.
• Examples are broccoli, kale, spinach, watercress and celery.

GUINEA PIG FOOD
• There are different types of food that are specially designed for guinea pigs to meet their nutritional needs.
• Always follow the feeding guidelines on pack for the correct amount to feed.
• Guinea pigs are unable to synthesise their own vitamin C, so it's important they receive sufficient amounts from their food.

TREATS
• Good for bonding with your pet.
• Examples are small amounts of carrot, strawberry, raspberry or cucumber.
• Give occasionally (limit them to avoid weight gain and dental problems).

Keep an eye on your guinea pig's body condition with the UK Pet Food Guinea Pig Size-O-Meter.

For more information please visit www.ukpetfood.org or simply scan the QR code opposite.

Guinea pigs are different from rabbits and have their own nutritional needs.

UK PET FOOD A Step-By-Step Guide to Prevent and Manage Pet Obesity

Helping You Get Hands-on With Your Pet

HEALTHY WEIGHT WHEEL

If your pet is overweight, or you notice a weight gain or loss, talk to your vet. There may be a health issue which needs treatment or a special diet!

Find the product that's suitable for your pet. Ask your veterinary professional for tips and read more on the label or online.

Follow the product's feeding guide, as a starting point. Adjustment may be needed depending on your pet's age, neuter status, breed and lifestyle.

Weight your pet regularly, and check their body condition using our fun Pet Size-O-Meters. Ideally, you should be able to feel their ribs with very light finger pressure.

Keep them moving! Ensure an active lifestyle with lots of walks and playtime. This has mutual health benefits for you and your pet.

Weight food portions with an accurate kitchen scale. Estimating food amount by volume is subject to error.

If you choose to treat your pet, do it occasionally. Adjust meals accordingly to help control calorie intake. Avoid human food and table scraps.

Weight management and light products, designed to have a lower energy density compared to their normal counterparts, are available to assist weight loss under supervision.

For information and more information please visit our website www.ukpetfood.org

www.ukpetfood.org



UK Pet Population Data 2024

TOP TEN PETS

1	13.5 MILLION DOGS 3.6% of households
2	12.5 MILLION CATS 29% of households
3	1.5 MILLION INDOOR BIRDS 3% of households
4	1.3 MILLION DOMESTIC FOWL 1.6% of households
5	1 MILLION RABBITS 1.6% of households
6	700,000 TORTOISES & TURTLES 1.6% of households
7	700,000 HORSES & PONIES 15% of households
8	700,000 GUINEA PIGS 12% of households
9	600,000 HAMSTERS 15% of households
10	600,000 SNAKES 13% of households

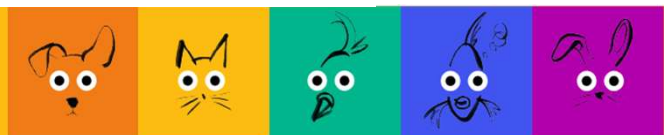
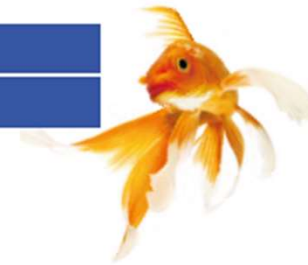


Note: All figures are rounded to the nearest 100,000



21% OF HOUSEHOLDS HAVE
INDOOR FISH TANKS

13% OF HOUSEHOLDS HAVE
OUTDOOR FISH PONDS



UK Pet Food Market Data -2023



PET FOOD MARKET 2017-23 TOTAL VOLUME & VALUE WITH ANNUAL GROWTH

		2017	2018	2019	2020	2021	2022	2023
Volume	Volume	1,299	1,283	1,281	1,298	1,314	1,345	1,329
000 Tonnes	% Change	-2%	-1%	0%	1%	1%	2%	-1%
Value	Value	2,655	2,683	2,727	2,892	3,007	3,413	3,677
£ Millions	% Change	2%	1%	2%	6%	4%	14%	7%

Excludes Wild Bird Food

UK PET FOOD
£4.1bn
TOTAL
 (LAST YEAR £3.8bn)

£2bn
DOGS
 (LAST YEAR £1.84bn)

£385m
OUTDOOR BIRDS
 (LAST YEAR £380m)

£1.53bn
CATS
 (LAST YEAR £1.43bn)

£16m
INDOOR BIRDS
 (LAST YEAR £15m)

£65m
SMALL MAMMALS
 (LAST YEAR £59m)

£68m
FISH
 (LAST YEAR £76m)



UK Pet Food Market Data

PET FOOD MARKET 2017-23 SECTOR VOLUME & VALUE WITH ANNUAL GROWTH

Here is an overview by species:

TOTAL DOG		2017	2018	2019	2020	2021	2022	2023
Volume	Volume	830	824	823	834	855	883	873
000 Tonnes	% Change	-1%	-1%	0%	1%	2%	3%	-1%
Value	Value	1,371	1,385	1,416	1,518	1,600	1,838	2,001
£ Millions	% Change	2%	1%	2%	7%	5%	15%	9%

TOTAL CAT		2017	2018	2019	2020	2021	2022	2023
Volume	Volume	388	381	386	393	390	392	393
000 Tonnes	% Change	-4%	-2%	1%	2%	-1%	0%	0%
Value	Value	1,141	1,158	1,176	1,238	1,271	1,426	1,527
£ Millions	% Change	3%	1%	2%	5%	3%	12%	7%

TOTAL SMALL ANIMAL		2017	2018	2019	2020	2021	2022	2023
Volume	Volume	67	63	58	56	54	53	48
000 Tonnes	% Change	-4%	-5%	-8%	-4%	-4%	-1%	-10%
Value	Value	65	62	57	55	54	59	65
£ Millions	% Change	-4%	-5%	-8%	-3%	-3%	10%	10%

TOTAL FISH		2017	2018	2019	2020	2021	2022	2023
Volume	Volume	3.1	3.1	3.1	3.3	3.4	3.5	2.4
000 Tonnes	% Change	0%	1%	0%	4%	4%	2%	-29%
Value	Value	67.1	66.9	66.9	68.4	68.6	75.6	68.3
£ Millions	% Change	-3%	0%	0%	2%	0%	10%	-10%

TOTAL BIRD INC INDOOR		2017	2018	2019	2020	2021	2022	2023
Volume	Volume	164	170	176	202	227	222	216
000 Tonnes	% Change	4%	3%	3%	15%	12%	-2%	-3%
Value	Value	228	237	252	291	358	395	401
£ Millions	% Change	4%	4%	6%	15%	23%	10%	2%

TOTAL BIRD EXC INDOOR/PIGEON		2017	2018	2019	2020	2021	2022	2023
Volume	Volume	148	154	160	186	211	206	199
000 Tonnes	% Change	5%	4%	4%	16%	13%	-2%	-3%
Value	Value	210	220	235	273	339	373	379
£ Millions	% Change	5%	5%	6%	16%	24%	10%	1%

TOTAL INC ALL		2017	2018	2019	2020	2021	2022	2023
Volume	Volume	1,452	1,442	1,446	1,489	1,529	1,554	1,532
000 Tonnes	% Change	-1%	-1%	0%	3%	3%	2%	-1%
Value	Value	2,872	2,910	2,968	3,171	3,352	3,793	4,062
£ Millions	% Change	2%	1%	2%	7%	6%	13%	7%

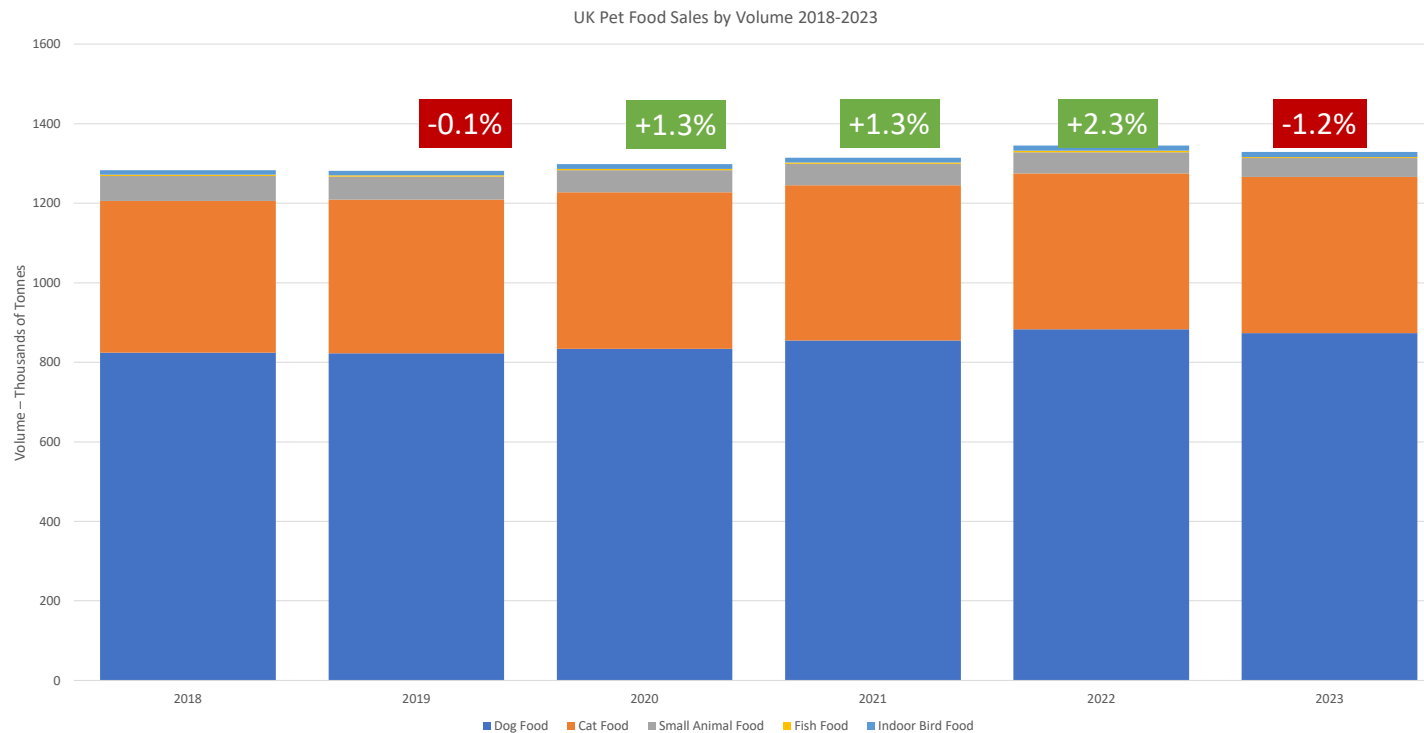




UK Pet Food – Market Data Scheme 2018-2023

UK Pet Food Trends

- The UK market is relatively static in Volume terms (currently 1,329 K Tonnes ex. Wild Bird food)
- The higher growth between 2021 and 2022 is likely due to the increase in pet ownership during the pandemic; between 2022 and 2023 inflation and the increased costs of living appear to have prompted some pet owners to feed (more) home made pet food, hence the slight decline in volume



Source: UK Pet Food/Soulor Consulting Ltd. 2024

Market Trends



- Diverse and dynamic market. Growth in small specialist companies.
- Healthy growth in the raw food sector ongoing.
- Increased treating.
- Gradual shift in sales from grocery to non-grocery channels
- Population spiked during pandemic but showing signs of a return to normal.
- Cost of living is having an impact but premiumisation continues as an ongoing trend.
- Sustainability driving product innovation in all areas from packaging to ingredients.



Fish meal & oil in pet food



- Fish oil uses
 - Used as supplement (tablet) or added to dry food surface after extrusion
 - Evidence that EPA and DHA (Omega 3) in fish oil confer a range of health benefits to pets through various life stages. Also extends to assisting when pets have certain disease conditions.
- Fish meal uses
 - Common ingredient in dry pet food.
 - High level of protein with high protein digestibility
 - Also high in fatty acids (Omega 3)



Fish Ingredients in Pet Food – 2018-2023



		2018	2019	2020	2021	2022	2023
Ingredients in production	% Animal by-products	33%	34%	30%	47%	26%	26%
	% Beef by-products - fresh	9%	2%	2%	2%	2%	3%
	% Beef by-products - rendered	n/a	7%	14%	11%	1%	1%
	% Lamb by-products - fresh	2%	1%	1%	1%	1%	1%
	% Lamb by-products - rendered	n/a	1%	4%	3%	1%	1%
	% Pork by-products - fresh	1%	0%	0%	1%	0%	0%
	% Pork by-products - rendered	n/a	4%	3%	2%	0%	0%
	% Poultry by-products - fresh	22%	5%	4%	6%	4%	6%
	% Poultry by-products - rendered	n/a	14%	18%	20%	7%	6%
	% Other by-products - fresh	1%	0%	0%	0%	0%	0%
	% Other by-products - rendered	n/a	0%	0%	0%	9%	8%
	% Fish (meal) by-products	2%	2%	3%	2%	1%	1%
	% Fish (oil) by-products	1%	0%	0%	0%	0%	0%
	% Fish (meat) by-products	0%	1%	1%	1%	0%	1%
	% Cereal-based products	46%	45%	42%	33%	42%	47%
	% Seeds	7%	9%	8%	14%	13%	18%
% Insect Protein	n/a	0%	0%	0%	0%	0%	
% Animal fats	n/a	n/a	n/a	n/a	4%	3%	
% Other	12%	13%	15%	3%	13%	4%	

- Fish based proteins account for 1-3% of all ingredients by volume with Fish Meal being the most significant of the three types (Fish oils the least significant)
- Volumes of different ingredients types will vary year to year as the list of members who submit each year is not entirely consistent, although many members do submit each year
- Cereal-based products represent the largest ingredient type in the industry by volume in 2023



Fish Ingredients – Source 2018-2023

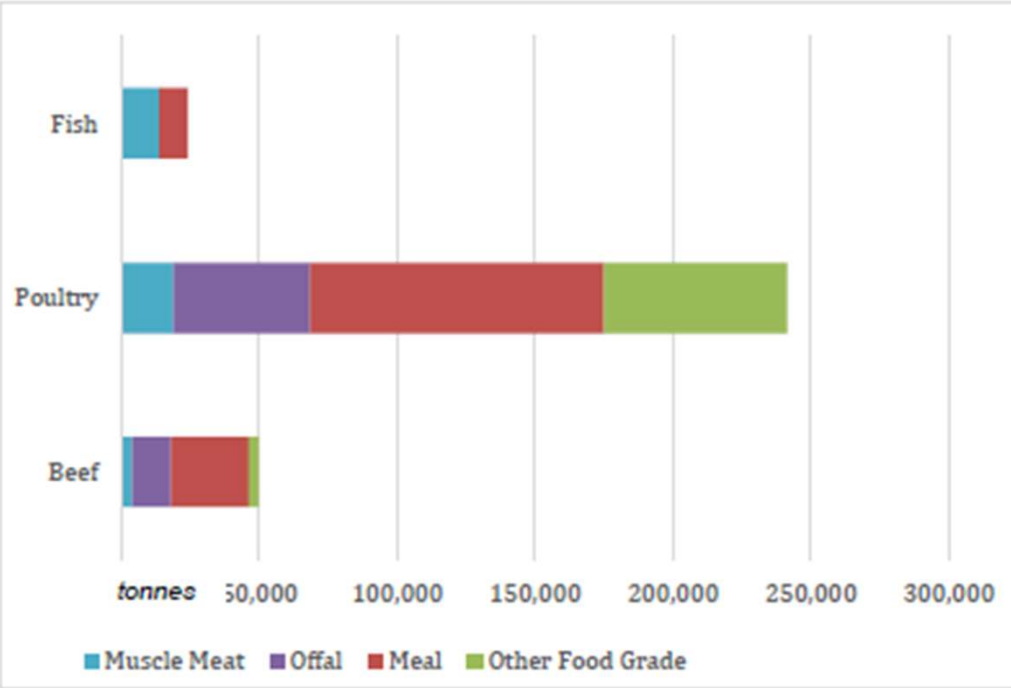


		2018	2019	2020	2021	2022	2023
Source of ingredients	% of Animal by-products bought in the UK	64%	59%	68%	66%	70%	42%
	% of Beef by-products bought in the UK - fresh	96%	83%	44%	52%	38%	54%
	% of Beef by-products bought in the UK - rendered	n/a	100%	99%	95%	20%	84%
	% of Lamb by-products bought in the UK - fresh	84%	53%	28%	35%	62%	65%
	% of Lamb by-products bought in the UK - rendered	n/a	73%	49%	58%	33%	26%
	% of Pork by-products bought in the UK - fresh	44%	100%	91%	18%	92%	13%
	% of Pork by-products bought in the UK - rendered	n/a	99%	100%	96%	55%	8%
	% of Poultry by-products bought in the UK - fresh	53%	53%	42%	58%	67%	57%
	% of Poultry by-products bought in the UK - rendered	n/a	34%	56%	57%	94%	46%
	% of Other by-products bought in the UK - fresh	41%	39%	37%	52%	59%	61%
	% of Other by-products bought in the UK - rendered	n/a	99%	62%	100%	73%	18%
	% Fish (meal) products bought in the UK	56%	34%	20%	19%	70%	63%
	% Fish (oil) products bought in the UK	81%	22%	26%	33%	37%	31%
	% Fish (meat) products bought in the UK	96%	24%	31%	46%	79%	32%
	% of Cereal-based products bought in the UK	49%	43%	56%	60%	66%	50%
% of Seed products bought in the UK	60%	32%	27%	37%	30%	33%	
% of Insect Protein products bought in the UK	n/a	0%	64%	0%	0%	0%	
% of Animal fats products bought in the UK	n/a	n/a	n/a	n/a	95%	41%	
% of Other products bought in the UK	54%	62%	70%	52%	52%	19%	

- The sourcing of ingredients shows variation between years however in most years the majority of ABPs are sourced in the UK, recently Fish Meal is mainly sourced in the UK
- Fish Oils much less likely to be UK sourced with the proportion originating in the UK being 22-37% (2018 appears to be an outlier)
- Fish Meat shows wide variations from one year to the next



Fish Ingredients compared to other ingredients



Animal type	TOTAL tonnes	%	Meal (tonnes)	Other Food Grade (tonnes)	Offal (tonnes)	Muscle Meat (tonnes)
Beef	49,846	16%	28,263	3,614	13,924	4,045
Poultry	241,358	77%	106,403	66,489	49,589	18,878
Fish	24,103	8%	10,435	-	-	13,668
TOTAL	315,307	-	145,101	70,103	63,513	36,591

UK Pet Food's Mission



Our mission is to advance pet health and well-being with **quality nutrition** from a **sustainable, progressive** pet food industry.

UK Pet Food's Sustainability Priorities:



Packaging
Recyclability



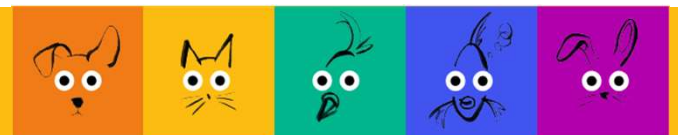
Sustainable
Ingredients



Animal
Welfare



Environmental
Impacts



WHY FOOD MATTERS

While the food and agriculture sector is vital to human well-being it is also a major cause of environmental harm and significant driver of climate change.



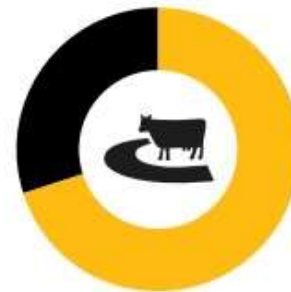
26%
of global
greenhouse gas
emissions come
from food



50%
of the world's
habitable land is
used for agriculture



78%
of global ocean
and freshwater
eutrophication is
caused by agriculture.



70%
of global freshwater
withdrawals are used
for agriculture



Setting the scene

- Food sector emissions by supply chain

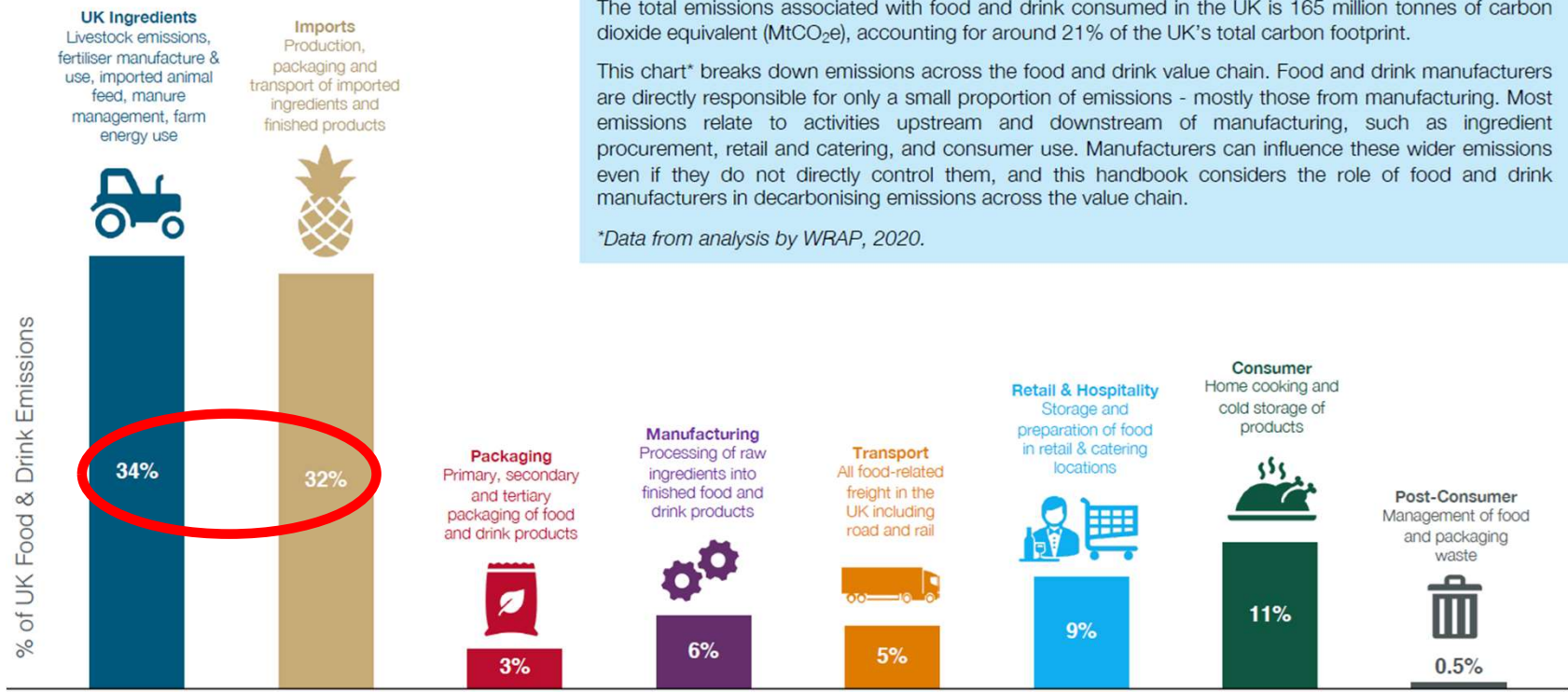


SECTOR TOTAL IN 2019 = 165 MILLION TONNES CO₂e*

The total emissions associated with food and drink consumed in the UK is 165 million tonnes of carbon dioxide equivalent (MtCO₂e), accounting for around 21% of the UK's total carbon footprint.

This chart* breaks down emissions across the food and drink value chain. Food and drink manufacturers are directly responsible for only a small proportion of emissions - mostly those from manufacturing. Most emissions relate to activities upstream and downstream of manufacturing, such as ingredient procurement, retail and catering, and consumer use. Manufacturers can influence these wider emissions even if they do not directly control them, and this handbook considers the role of food and drink manufacturers in decarbonising emissions across the value chain.

**Data from analysis by WRAP, 2020.*



Understanding our impacts



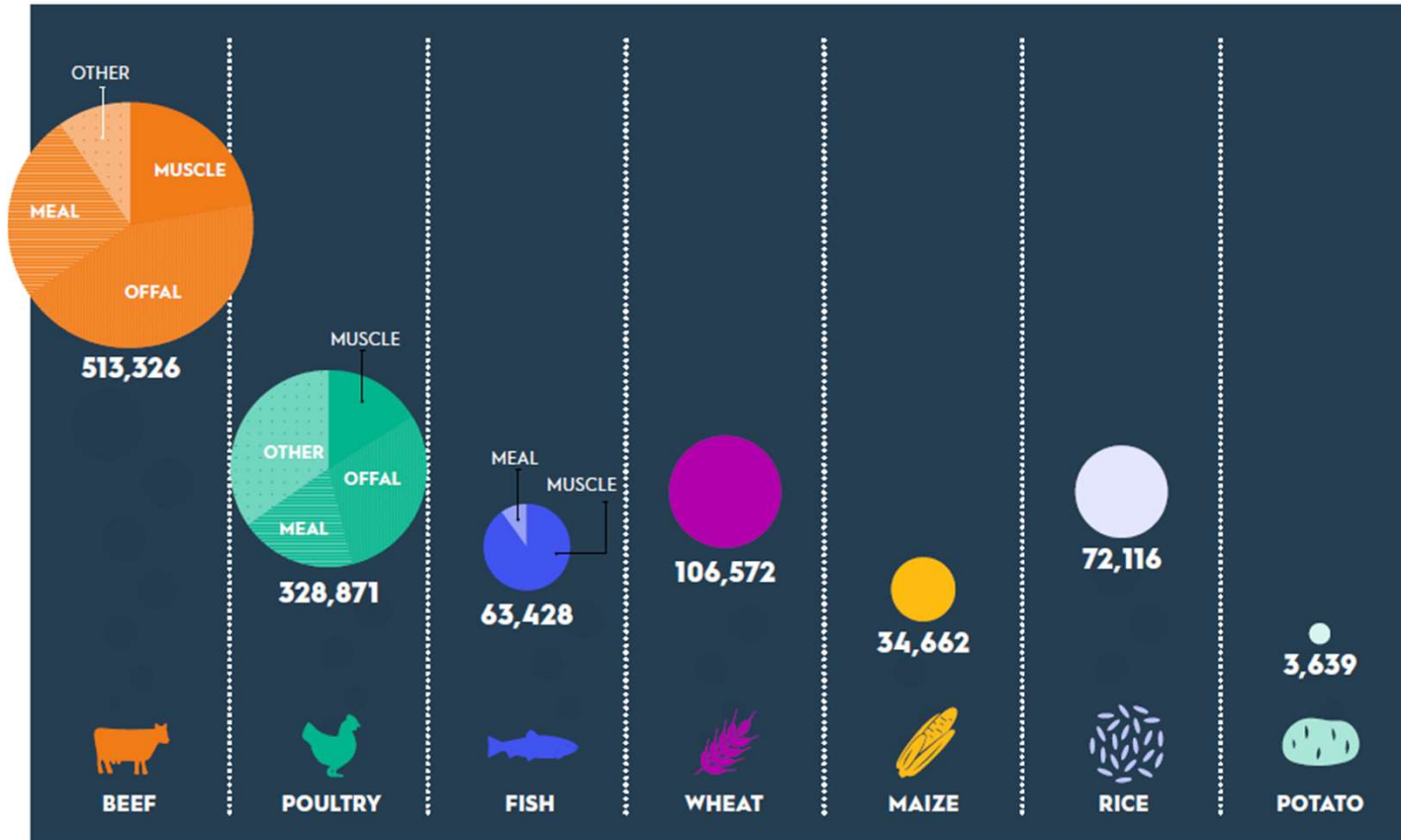
- WE FOCUSED ON SEVEN COMMON PLANT AND ANIMAL INGREDIENTS. The ingredients constitute 81% of ingredients of cat and dog food sold in the UK and includes the different parts of the animal used (muscle, offal, rendered meat etc).



KEY FINDINGS GHG EMISSIONS



TOTAL GREENHOUSE GAS EMISSIONS PER INGREDIENT TYPE

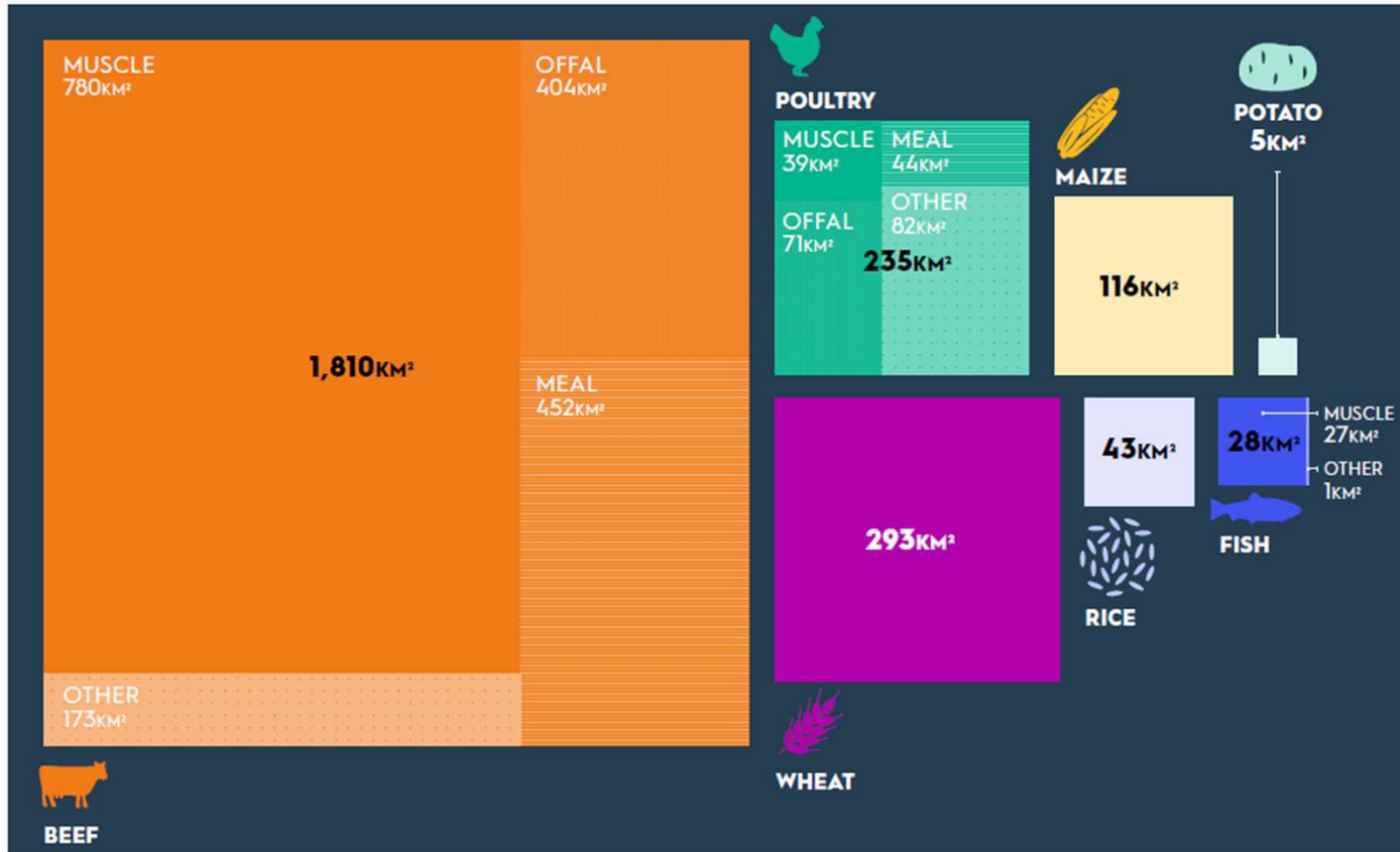


KEY FINDINGS

LAND USE



TOTAL LAND USE PER INGREDIENT TYPE

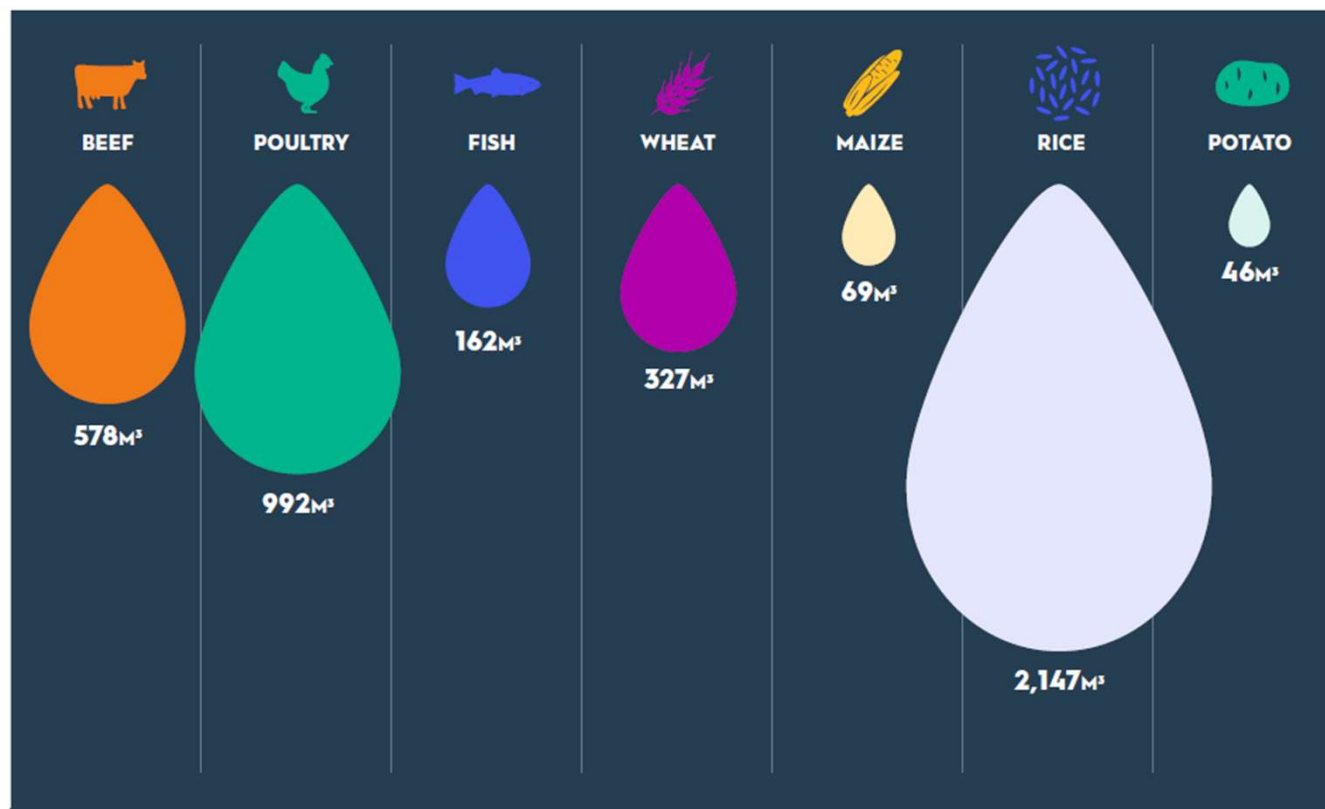


KEY FINDINGS

WATER USE

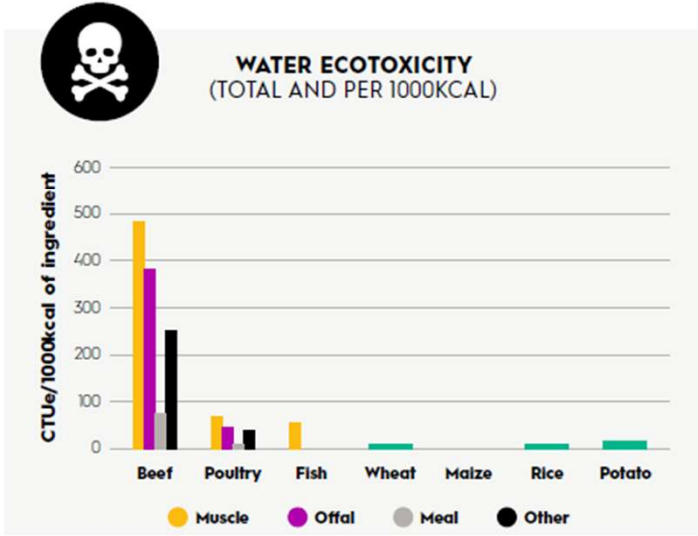
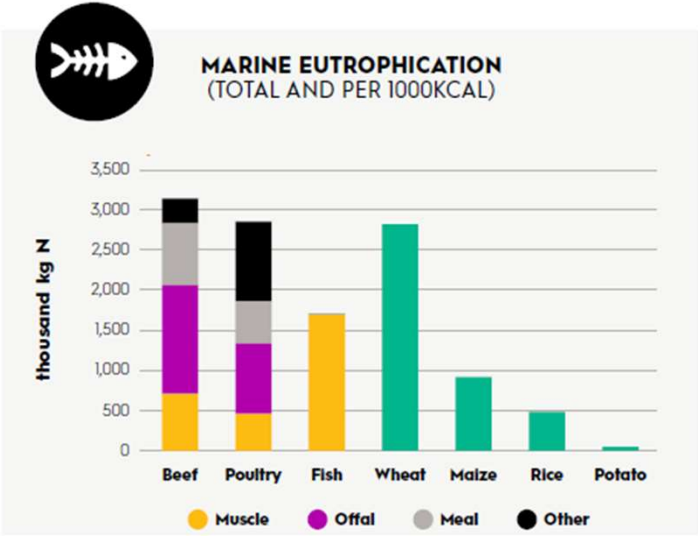
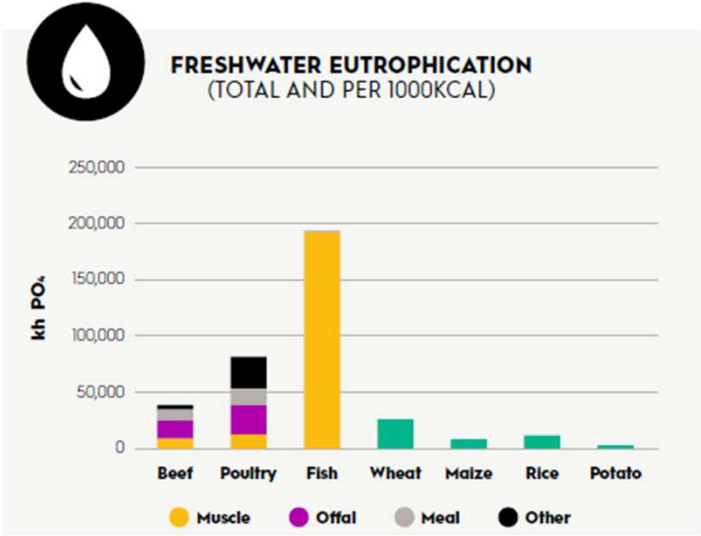


TOTAL WATER USE PER INGREDIENT TYPE



KEY FINDINGS

WATER POLLUTION



AN ACTION PLAN

OUR FIVE STEP PLAN



1

Identify your ingredients with the greatest impacts, especially for your high selling ranges.



2

Understand how you can reformulate your products to use less of the "big impact" ingredients.



3

Engage with your suppliers to reduce the relative impact of the "big impact" ingredient.



4

Develop a plan for accurately measuring the impacts specific to your product ranges and mapping an impact reduction strategy.



5

Engage with your customers about sustainability and nutrition to help them make informed choices that are good for their pet and the planet.



UK PET FOOD

Any questions?

Please contact UK Pet Food secretariat info@ukpetfood.org.uk

www.ukpetfood.org

