

UK Pet Population and Pet Food Market

The Pet Food Manufacturers' Association (PFMA) is the principal trade body representing the UK pet food industry. Since 2008, PFMA has been tracking the UK pet population working with TNS, a globally recognised leader in consumer research, to provide robust data. This data is used by PFMA members and a wide range of bodies including government departments, pet care businesses, welfare charities and the media. The data provides interesting facts and figures about all pet types – but it is also used to shape strategies and as such, the quality and accuracy of this data is therefore critical.



TOP TEN PETS

1	Fish in tanks	15-20 million	
2	Fish in ponds	15-20 million	
3	Dogs	8.5 million	
4	Cats	8 million	
5	Rabbits	900,000	
6	Indoor birds	700,000	
7	Domestic Fowl	600,000	
8	Guinea pigs	500,000	
9	Hamsters	300,000	
10	Horses	300,000	

To ensure a robust set of results, TNS gather the data through an omnibus survey with a sufficiently large sample. The data is averaged across two years, which gives a sample size of approximately 8000 households. These figures are considered by industry standards to be very strong, with a confidence interval of 95% and 1% margin of error.

Here is a Snapshot of How the UK Pet Population is Faring:

- The UK has a pet population of approximately 54 million
- 12 million (44 per cent) households have at least one pet
- Around 33 million pets are aquatic; 21 million are non-aquatic
- Over a third of households with children said they would consider a small mammal as a pet
- Just over half of the households surveyed state that dogs are the perfect pets
- Over a third of cat-owning households have two or more cats

Cats Claw Their Way Into the Affections of Men

The new research confirmed a 500,000 rise in the cat population. This increase is largely driven by a rise of over 25 per cent in the number of men owning cats, which has now reached eight million. More young people are also choosing to keep cats, with those aged 16–34 up three per cent and those aged 35–44 increasing two percent. First



A rise of over 25% in the number of men owning cats
(approx. 1m more men in 2017 than 2016)

First Pets

As with general ownership patterns, cats were more likely to have been a first pet in the south-east and dogs in the north. Rabbits, hamsters and guinea pigs made up a total of 10% (5%, 4% and 1% respectively). This is, in relative terms, a lot higher than the proportions of those species in the general population survey, suggesting that small animals are more likely to be owned by households with children as 'first pets'. Of the 2124 households asked, 28% said that they had or would consider owning a small mammal; 35% of households with children reported that they would consider a small mammal.

Michael Bellingham, PFMA Chief Executive, comments: "Some people assume it is difficult to look after a small mammal and they don't know how to provide the right care. There is a wealth of educational resources out there to support would-be owners so they don't need to miss out. However, it is important that people do the research first to make sure they are choosing a pet appropriate to their lifestyle and that they can provide the right care. Information is available from welfare charities and organisations such as PDSA and RSPCA and as the experts in nutrition, PFMA provides feeding factsheets and guidance.

In the survey, the perfect pets were given as dogs (53%) and cats (23%). The two reasons given for nominating a perfect pet were companionship (39%) and ease of looking after (28%). Variations in these two responses came with the age of the respondents with predictable results... an older person was more likely to report the reason as companionship; a younger person for ease of looking after (although the variations are not huge).

Nutrition – Reading the Facts

As PFMA is all about nutrition, we also surveyed the public to garner insights on feeding behaviour.

- Our research shows that 88% of owners choose a commercially prepared pet food but we know that owners supplement with snacks. Our Obesity Report (2014) confirmed that over a third of owners use 'human' food to treat. 53% of dog owners who feed table scraps do so daily and 49% of cat owners who feed table scraps do so daily.
- In terms of attitudes towards reading nutritional information on the pet food label, 43% of owners never read this, and the main reason (40%) is that they never read information on packaging. A further 9% claim no interest in calorie consumption by their pet(s). 35% claim to already have the relevant knowledge about the correct diet for their pet(s). However, feeding guidelines are a vital piece of information on the pet food label as they provide recommended portion sizes based on the size/weight of a pet. PFMA advises owners to follow the feeding guidelines, adapting to the individual needs of their pet.
- According to a survey of the veterinary profession conducted at the London Vet Show (November 2016), vets believe that 49% of dogs, 44% of cats, 32% of small mammals and 11% of birds are overweight or obese.



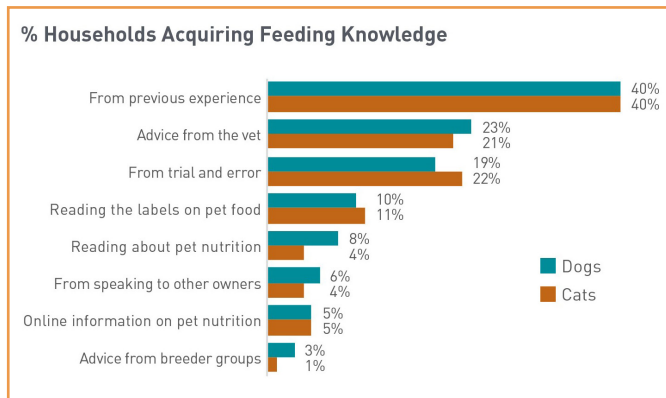
Vets believe that 49% of dogs, 44% cats, 32% small mammals and 11% birds are overweight/obese. LVS November 2016

- 90% of vets agree that prepared pet food provides optimum nutrition when fed correctly (LVS November 2016)



90% of vets agree that prepared pet food provides optimum nutrition when fed correctly

Where Do UK Pet Owners Acquire their Feeding Knowledge?



Market Growth

The pet food market saw growth in value in 2016 and has now reached £2.6 billion (excluding wild bird). Volume growth was flat, in line with the pet population, as expected in a mature market.

PET	VOLUME 000 TONNES	VALUE £M
Dog	835	1348
Cat	406	1108
Fish	3	69
Small animals	69	68
Pet bird	12	12
Total pet	1325	2605



Delving into More Detail, Key Highlights from the PFMA Market Data Report Include:

- The most dynamic areas of growth in both the **cat and dog food** markets have been in specialist, niche products, including those focusing on specific health attributes
- In **dog food**, the strongest growth has been seen at the premium end of the market, in line with 2015
- In 2015, PFMA members reported that the strongest growth areas in the **cat food** market had been at the premium and value ends of the market; however, in 2016 the spread is more even
- **Dry complete** dog food is the dominant feed for UK dogs, accounting for 50% of total volume. This sector is now estimated to be worth £573m
- **Dry complete** cat food was the fastest growing of the main meal categories for cats in recent years
- The **cat treat** market has been showing dramatic growth for many years. Currently valued at £126m, the market is now worth six times the amount it was worth in 2007
- The **small animal** market fell in 2016 which may reflect the broader trend of a decline in pet ownership in the UK

Michael Bellingham, PFMA Chief Executive, summarises how the market is performing: "The pet food market saw growth of 2% in 2016 with the market continuing to an all-time high of £2.6 billion. Without doubt the field of pet nutrition moves at a fast pace. The offering has changed dramatically over the years, moving us from basic pet foods that provide the right nutrients in the right quantities to more sophisticated foods that do this and more. In terms of trends, humanisation of pets continues to be the biggest and most impactful trend in the pet food industry."

Wild Birds and Feeding Habits

PFMA also represents manufacturers of wild bird feed. Feeding the birds is a good way for people of all ages to connect with nature and can also provide a source of companionship. Key findings in our survey are:

- Amongst the 93% of households with some form of outdoor space, 43% of households feed wild birds
- Older householders are more likely to feed wild birds, as are those who also have pet birds. Younger households (with children) are less likely to feed wild birds
- The time of year most associated with the feeding of wild birds is winter, when 51% say they feed over this season. This proportion grows in rural areas (to 57%) and this is an ongoing theme, as rural dwellers are more likely to feed the birds than their urban counterparts



Nicole Paley

PFMA Communications Manager and runs the PFMA Press Office. Nicole also sits on the Communications Working Group of the European Pet Food Federation, FEDIAF and participates in the communications discussions of the Global Pet Food Alliance, GAPFA.

Email: nicole@pfma.org.uk