

# Pet food and pet care categories surprisingly resilient during pandemic

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Despite the fact that many retail categories saw large sales decline during the Covid-19 pandemic, one category to buck this trend was the pet food and pet care categories which saw only a small decline in 2020 compared to the same period in 2019, reveals a recently released BMi Research report.

The report, which was completed at the end of 2020, encompasses respondents' full extent of the impact of the Covid-19 pandemic, and incorporates some of their responses to conditions in this sector at the beginning of 2021.

The primary cause of category declines was the pandemic which exacerbated already-recessionary conditions, drastically curbing consumer and business spending. However, the South African pet food and pet care categories proved to be fairly resilient, despite the recorded decline, when compared to the performance of certain other fast moving consumer goods categories in 2020, reports Shawn Henning, a consultant to BMi Research.

"Despite the economic downturn consumers were still intent on feeding their pets. When affordability became an issue, they downgraded to more cost-effective alternatives and smaller pack sizes," says Henning. "Disruptions to global supply chains also meant that imported brands of pet food were not always as easily available in which case consumers switched to local brands."

Although there is a perception that imported pet food brands offer better quality, the reality is that at the upper end of the price scale, local brands hold their own against these imported products, insists Henning.

While pet owners may have downgraded to more affordable local brands during the pandemic, their focus on pet wellness and overall health has grown. "In the same way that consumers have become more focused on their own health and wellness during the pandemic, they are now just as focused on health, wellness and improved immunity as far as their pets are concerned with sales of vitamin-related supplements increasing," reports Henning. "The growth of health and wellness products within the pet food category indicates that pets are no longer viewed merely as pets, or a means of providing additional security, but rather that they are companions or members of the family."

Interestingly, pet owners were spending more money on treats for their pets while they worked from home due to lockdowns.

Online sales of pet food and pet care products in South Africa have traditionally under-performed when compared to other categories such as clothing and electronics. The pandemic, however, gave rise to increased interest and growth in online purchases in the pet food and pet care categories. "Although online sales still account for only a small percentage of overall pet food and pet care sales, this will be an interesting space to watch," says Henning.

Garage forecourts have also benefited from increased purchases of pet food products with the result that they have adjusted their product offering to ensure a mix of relevant pack alternatives to better cater to consumer needs.

Although the pet food and pet care categories have rebounded in 2021 to exceed 2019 sales volumes, imported brands have not recovered to the same extent as local brands. Pack preferences too have changed as consumers have tended to focus more of their spend on larger pack sizes that are more affordable per kilogram.

Prior to the pandemic the pet food category enjoyed healthy year-on-year growth with brand innovation, awareness of pet health, wellbeing and novelty items all contributing to the consistent demand recorded.

In South Africa, premium brands of pet food have continued to emphasise and market their commitment to animals' health, science-based nutrition and their support of a variety of animal shelters.

Global trends in the pet food and pet care market inclining towards natural products, niche products and speciality services are affecting the local pet care market. Henning reveals that interest in natural products is growing with a focus on sustainability of products and increasing concern about synthetic ingredients and packaging.

Other areas of growth, particularly in affluent areas of South Africa, include the mobile pet grooming business, pet sitting, pet portrait photography, pet insurance and specialised services such as Reiki, pet spa services and pet behaviourists, all of which are part of the pet humanisation trend seen globally.

"As the disposable income of consumers improves, volume growth in the pet food and pet care categories is expected in 2022," says Henning. "At the same time, new players are expected to enter the market. We expect that there will be a continued focus on essentials as consumers remain uncertain about what the future holds. In a similar vein, given consumers' continued price sensitivity, we expect that value will remain - a prominent motivator behind the trialling of new brands, as well as alternate channels."

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