

Pet and Human Health Collide

As pet adoption in America is steadily increasing, so does their owners' appetite to treat them better. Today, almost 70% of all U.S. households own a pet ⁽¹⁾ and 95% of people consider their pets a member of the family. Furthermore, 84% are concerned about the ingredients in their pets' food. Pet owners expect the same high quality ingredients like protein, fats, carbohydrates and vitamins in their pets' daily diet as they do their own. These trends are all combining to drive robust pet industry sales. According to a report by *Markets and Markets*, the pet food ingredient market was estimated at \$34.96 billion in 2018 and expected to grow by a compound annual growth rate (CAGR) of 5.4%, reaching \$45.44 billion by 2023 ⁽⁵⁾. Over the past few years, new premium ingredients have flooded the pet food market, emphasizing new trends like grain-free, vegan, plant-based, and strictly animal based pet food. Pet food options increasingly mirror what consumers want out of their own daily diet. But, is this right for their pet?

Growing Trends in the Pet Food Space

Nowadays, pets are looked at more and more as an integral part of the family dynamic in daily life. According to *Forbes*, there are now more pet-owning households than there are households with children, some 84.6 million pet-owning households versus 52.8 million households with children. Pet-owners take their responsibility and duty to provide for their furry little friend very seriously. So seriously in fact, that 43% of American pet owners say, if they were on a strict budget, they'd be willing to give up their Netflix subscription to provide for their pet ⁽²⁾. Furthermore, 55% of pet-owners claim that they'd give up chocolate in order for their pet to have high-quality food that meets their pet preferences. Pet-owners have long had expectations of "high quality" pet food, but recently that need has morphed into a desire for "humanized" pet food; consumers want pet food options that address many of the same health concerns that influence human food production, like removal of unnatural preservatives and genetically modified ingredients ⁽²⁾.

Clearly, pet-owners are willing to go long lengths to make

sure their pet is cared for. So, who's driving the immense growth in healthier pet food options? Millennials. Coincidentally, driving growth in the sustainable food and diets market as well, Millennials have overtaken the baby-boomers as the largest pet-owning generation. Millennials take the pet-owner 'cake' with 35% owning pets, compared to baby boomers at 32% and dwindling ⁽³⁾. Taking into account, it's not only because Millennials are moving up in careers and income, and boomers are nearing or at retirement, but it's Millennials' immense devotion they show their pets that has and will amplify the pet industry boom.

In today's market, the "clean label" claim is important when driving demand for your product. Similar to human food trends, having a "clean label" for pet food is a leading area of focus for many pet food manufacturers. With over 60% of pet food product launches using one or more "clean label" claims like, "natural," "organic," "no additives/preservatives," and/or "GMO-free" claims. Nearly 46% of pet food products claiming "no additives/preservatives" were most popular in human purchasing decisions,

ahead of the “natural” claim with 35%. Other correlations like interest in “GMO-free” products have risen and now surpass that of “organic” claimed products. Non-GMO claims were used for 7.5% of pet food launches in comparison to 4% for organic claim products ⁽¹⁰⁾.

The humanization of the pet food market is a continual trend mirroring innovative healthy foods and drink products. According to a survey conducted by *Kerry*, an ingredient supplier for pet food, 77% of consumers say they are actively trying to improve their health in some way and reading ingredient lists is key to achieving that goal. So, what do the younger versus older generation look for on nutrition labels? Millennials tend to focus on added nutritional benefits like proteins, vitamins, and minerals, while baby boomers focus on removing sugar, fat, and sodium ⁽³⁾.

While pet food manufacturers have been chasing animal meat for a protein rich ingredient, they shouldn't lose sight of soy. According to the Protein Digestibility-Corrected Amino Acid Score (PDCAAS), adopted by the U.S. FDA in 1993, as the preferred best method to determine protein quality and digestion, soy is on par with many animal proteins. Animal meat is a 'complete protein' source with all essential amino acids, vitamins, and minerals but what concerns health professionals is the high amounts of saturated fats animal meat contains. Soy on the other hand, is the only plant-based 'complete protein' that offers all the same nutritional benefits of animal meat, without the heightened saturated fat intake increasing cholesterol ⁽¹¹⁾.

Pet Ingredient Trends at a Glance

Pet food ingredient market growth is driven by a variety of factors including an increase in pet ownership, the humanization of pets, demand for premium ingredients in pet food, and strategic acquisition and rapid expansion of facilities by top pet food manufacturers ⁽⁵⁾. According to *Global Market Insights*, increasing awareness of nutritional importance and continuous research and development in ingredients like amino acids, omega-3 fatty acids, dietary fibers, carotenoids and other minerals may encourage overall market growth. Playing a vital role in protein creation, amino acids like lysine, cysteine, threonine and other essential and nonessential amino acids are widely utilized in manufacturing pet food. Some amino acids like lysine and threonine can not be made by the animal body, so they must be provided in other supplements in order for a pet's proper nutrition ⁽⁴⁾.

In regard to illness and disease prevention, a rising number of issues like diarrhea and chronic nausea are due to an unhealthy gut and improper diet. Omega-3 fatty acids, prebiotics and probiotics, mannan-oligosaccharide (MOS), beta-glucan and fructooligosaccharides (FOS) are all used in pet food ingredients to better gut health of pets. These essential amino acids and ingredients help restore balance by binding macrophages and white blood cell receptors that fight against tumor and microbial activity. These ingredients are essential to pet health, which is driving market demand. Also, natural product ingredients like soy, corn, grains and vegetables widely used because of their high nutritional value and low cost make these ingredients a key factor for an increasing product demand ⁽⁴⁾.

The Misconception Between Human & Pet Health

Human and pet nutrition may align when it comes to factors like organic and essential nutrients such as amino acids, proteins, carbohydrates, and other minerals and vitamins, but when it comes to food elimination and dieting; that's where the two diverge. Misconception of trends in the pet-food market have started to inadvertently mirror consumer habits and preferences. Trends like grain-free, gluten-free, low carbohydrate diets, and strict animal protein diets have created some really harsh reality for pet owners. For example, grain-free dog food was originally intended specifically for animals that were tested, evaluated and confirmed to have sensitivity or dietary issues and were recommended to follow the dietary guidelines prescribed by a veterinarian. However, in the past decade millions of dog owners (as well as owners of other species) have stopped using conventional foods that contain ingredients like oats, rice, or other carbohydrates due to the concern that it might be bad for their dogs' health. Grain-free dog food now dominates almost half of the dog-food market in the United States. Similarly, over the same period of time, gluten-free and low carbohydrate diets also boomed in popularity for humans ⁽⁶⁾.

“In July 2018, the *Food and Drug Administration (FDA)* announced it had begun investigating reports of canine dilated cardiomyopathy (DCM) - heart disease - in dogs eating certain pet foods, many labeled as 'grain-free.'” ⁽⁷⁾. There were 524 cases of dogs and cats diagnosed with DCM tracked by the FDA from January 1st, 2014 to April 30th, 2019. 98.7% of the 524 cases of DCM occurred during the years 2018-2019. According to Lisa Lippman, a New York veterinarian for in-home veterinary services,

"It's extremely, extremely rare for dogs to have grain sensitivity. This is a battle we face almost every day in the clinic, and it's something that's definitely been a source of frustration for us since before the FDA warning came out"⁽⁶⁾.

Myths and misconceptions in articles, social media, selective listening or social influence can turn misinformation into popular belief rapidly as people in the general population struggle to conceptualize what science has to say about diets or dieting. What pet-owners may think is a "healthy choice", might not translate to their pet.

Human and Pet Health Align with the Help of Soy

Soybeans are one of the most widely used sources of high quality protein in human and animal food in the US and around the world. Soybeans are not only nutritionally beneficial, offering a 'complete' source of protein and tons of healthy characteristics, but offer consumer-demanded important benefits like sustainability and transparency. According to *Hill's Pet* website, soybeans' complementary amino acid profile combines great with other proteins and grains. And, unlike other common protein sources such as meat, fish, poultry or milk, soy products hold all the healthy traits pets and their owners are looking for: High in vitamins and folic acid, essential amino acids

(especially lysine), concentrated source of fatty acids, shown to lower cholesterol (no cholesterol), good source of fiber and potassium, easily digestible, and contains key antioxidants⁽⁸⁾.

Soybeans are the only 'complete protein' source that is completely plant-based. Soy is a fantastic source of bodybuilding protein blocks and essential amino acids to help pets grow strong and build muscle⁽⁹⁾. Soy also offers the proper balance of omega-3 and omega-6 fatty acids that benefit your pet, and are key ingredients to a shiny, healthy, and nourished looking coat. And finally, soy offers estrogen-like chemicals that aid in health, help pets with specific medical conditions and or aren't able to digest animal protein.

Take Action

Plant-Based Food Facts is dedicated to help pet-food companies sustainably meet the demands of a growing pet-food market while supporting U.S. soybean growers. To learn more about the sustainability of various protein sources and what U.S. grown soybean products can do for your pet, contact David Miller at info@plantbasedfoodfacts.com.

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