

General Food: Opportunities in Dog Food Market

*These groupings of food are based on the industry's evolution, and different from the four food categories we now have at Pet Life.



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Ingredients Movement

Ingredient choices are driven by quality, human preference and nutritional benefits with less regard for cost effectiveness. Holistic foods typically avoid the "red flag" ingredients like corn, wheat, soy, and by-products. These foods also contain fruits and vegetables. Some companies refer to their foods as "holistic" during this movement.*

Wellness	Canidae
Holistic Select	Solid Gold
Blue Buffalo	Wysong
Chicken Soup	Weruva
Merrick	Prairie

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QUALITY

ALLERGIES

FOOD SENSITIVITIES

Limited Ingredients

Emerged in response to sensitive stomachs and allergies. Two approaches:
 Truly limited ingredients with single protein source and hypoallergenic starch sources
 Single source protein which contains only one protein source but the rest of the ingredient panel is similar to a holistic food (fruits, veggies, etc.)

California Natural
 Canidae
 Earthborn
 Hill's Science Diet: Ideal Balance
 Natural Balance
 Instinct LID
 Zignature
 Wellness Simple Solutions

Traditional foods

General Mills, Quaker Oats, M&M, Nabisco, and others saw pet foods as a profitable way to market by-products, and added pet foods to their human lines of products post WWII.

1950 - Hill Packing Company opened canneries, meat canned cat food was first at this time (1)
 1950s - Extrusion process started by Purina® (Dog Chow, Cat Chow)
 Extruded, baked, then nutrients added back in (1)
 1964 - Pet Food Institute started campaign warning consumers about the dangers of feeding table scraps, marketing "complete" pet foods via extrusion process (2)
 1968 - Science Diet® line was developed by Dr. Morris Jr.
 1976 - Colgate-Palmolive® purchased Hill's Pet Nutrition (6)
 1981 - Small Animal Nutrition acquired by Dr. Morris Jr.

CONVENIENT

COST

Introduction of Commercial Pet Food

1888 - James Spratt invention of first dog biscuit (biscuits, bread, beef)
 1890 - Commercial pet food manufacturing began first in the U.S.
 1907 - M&M's first "dog biscuits" sold to M&M by F. J. Bennett

The practice of human grade "food scraps" for pets began to be scrutinized by companies that viewed pet food as a profitable prospect. Dry and canned pet food manufacturing began to rise the Commercial Pet Food Revolution.

1920s - Canned food® introduced canned cat food, dry meat meal dog food
 1920s - Dr. Morris, a veterinarian, saw his 12-year-old dog, a Boston Terrier, (later named Canine 1-01) die of kidney disease, a chronic condition suffering from kidney disease. Canned in Puller's initially, the pet animal foundation.

Pet food was classified as "human-essential" when meat was removed during World War II. Production of pet food began to rise significantly.



These two food ideologies spawned out of the ancestral movement. Prepared raw includes raw food, dehydrated and freeze-dried foods. BARF is Bones and Raw Food, not commercially prepared.

Prepared Raw
 To Natural
 Nature's Variety
 Stella and Chewy's
 Steve's
 The Honest Kitchen

B.A.R.F.
 Raw meat from butcher, farmer
 Fresh fruits, veggies, eggs, dairy
 Raw bones

Prepared Raw & BARF

MINIMALLY PROCESSED

FRESHNESS

Grain Free

Within the last ten years, one of the most popular trends has grown out of the desire to get back to our pet's ancestral roots. This movement focuses on providing a grain free diet that uses animal proteins as the primary protein source. These foods use starches such as potato, sweet potato, peas, lentils and garbanzo beans.

Blue Wilderness	Orijen
Canidae Pure	Instinct
CORE	Innova Prime
Earthborn GF	Ideal Balance (Hills)
Evo	Solid Gold (2 varieties)
Grandma Maes	Taste of the Wild
Holistic Select (1 variety)	

GRAIN FREE

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Introduction of Commercial Pet Food

1860 - James Spratt invention of first dog biscuit (veggies, blood, beets)

1890 - Commercial pet food manufacturer brought this to the U.S.¹

1907 - Milk Bone™ dog biscuits made in NYC by F.H. Bennett²

The practice of human grade 'food scraps' for pets began to be scrutinized by companies that viewed pet food as a profitable prospect. Dry and canned pet food manufacturing began to start the Commercial Pet Food Revolution.

1930s - Gaines Food® introduced canned cat food, dry meat-meal dog food

1939 - Dr. Morris, a Veterinarian in NJ developed a canine diet (later named Canine k/d) for Buddy, a clients guide dog suffering from kidney disease. Canned in Ball jars initially. (Morris Animal Foundation)

**Pet food was classified as "non-essential"
when metal was rationed during World War II
Production shifted to dry foods =
85% of the market²**

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Influencer COST