



Revolutionize Pet Wellness with Science-Backed Microbiome Support

2024 Pet and Animal Wellbeing Market Insights Report



The Future of Holistic Pet Care is Here

Pet parents know that supporting their pets' microbiome is essential for their overall wellbeing

Today's pet parents are savvy, health-minded consumers who prioritize their pets' health. They take a proactive approach to their pets' wellness in order to provide them with a healthy quality of life. For many pet parents, this starts by supporting their pets' microbiome. A balanced microbiome helps to maintain a healthy digestive system, supports oral health, and aids in weight management and overall metabolic health.

Science-backed ingredients, including prebiotics, probiotics, postbiotics, and enzymes, play a crucial role in maintaining a healthy microbiome. Incorporating these ingredients into a pet's diet not only enhances their health, but also helps with nutrient absorption, which is vital for growth, energy, and overall wellness. When pet parents choose microbiome-supporting products, they are actively taking steps to support their pets' health from the inside out.



88% of pet owners say it's important to take preventative measures to protect their pets health.¹

A Growing Market

As pet parents seek out products to optimize their pets' health, the demand for innovative solutions will continue to grow. When formulating products to meet these demands, we focus on incorporating science-backed, efficacious ingredients that enhance pets' physical and behavioral health over the long term.

The global functional pet food market size is expected to grow **8.8% per year** from 2021 to 2030.²

¹Mintel, US Pet Owners Survey, 2021

²Allied Market Research (2022). Global functional pet food market expected to reach \$4,676.1 million by 2030. Allied Market Research.

Ingredients to Support a Healthy Life

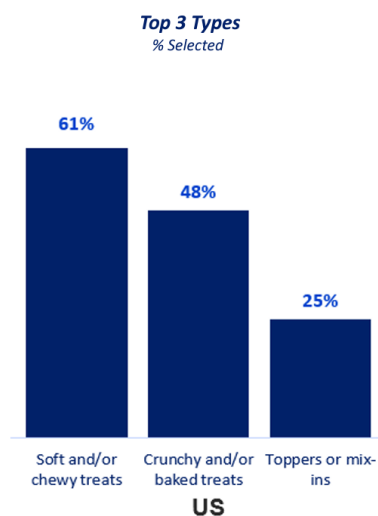
As a leader in microbiome technology, we understand the significant role that a healthy gut can have in the wellness of our furry family members. We also know that pet parents want options when it comes to addressing their pets' health needs. By incorporating pre-, pro-, and postbiotic strains in a variety of formats - such as foods, treats, and supplements - we make it convenient for consumers to choose products that help their pets lead healthier, happier lives.

72% of pet parents would be interested in buying some type of supplements with benefits for their dog(s) and/or cat(s).³

64% of pet parents would be willing to pay more for treats with benefits than for supplements that don't have a supplementary ingredient.³

41% of pet parents have purchased prebiotics, probiotics, and/or postbiotics in the past two months.³

52% of pet parents have looked up new food, treat, and/or supplement products in the past two months.³



³ADM Outside Voice Consumer Market Research conducted in the U.S.*
*ADM Outside Voice Consumer Market Research consisted of a poll of more than 3,000 pet parents around the world who have at least one cat or dog in their household.

Raising the Bar on Pet Nutrition

Backed by science, ADM delivers an array of effective custom and turnkey products to support pet health and longevity. Clinically studied and scientifically proven in both human and animal models, our health-forward ingredients deliver effective wellness solutions in a variety of desirable formats:

SUPPLEMENTS

- Capsules
- Tablets
- Soft Chews
- Sachet/Stick Packs

TREATS

- Crunchy and meaty treats
- Dental treats
- Training reward treats

FOODS

- Kibble
- Wet food
- Liquid toppers
- Freeze-dried products

BULK BLENDS

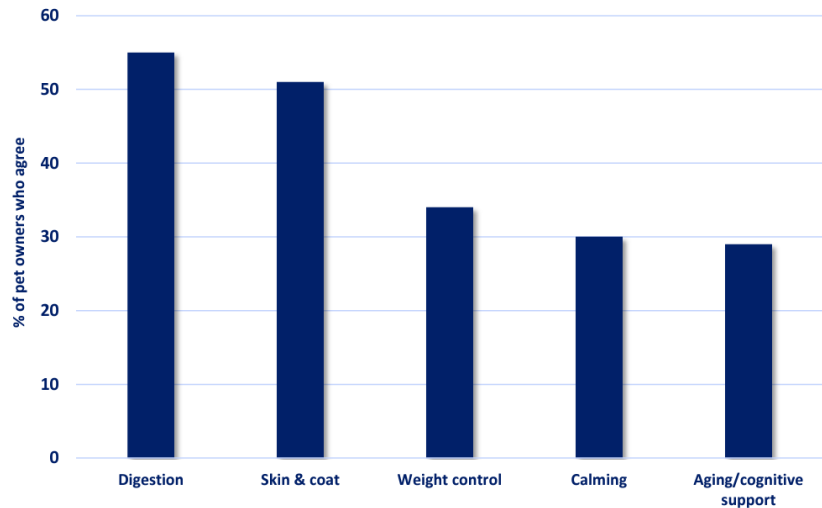
- Powders
- Blends

Different formulations enhance consumer appeal and address multiple benefits for their pets.

Maintaining a Healthy Microbiome

Pet parents seek tailored solutions to fit their pets' individual health needs. As the pet industry gains deeper insights into pet behavior, there's an opportunity to develop personalized products that support overall wellness and healthy aging, particularly in areas like digestive support, oral health, and metabolic health. With the global pet population aging, the demand for these customized microbiome-supporting products is growing.

Health Benefits Desired by Owners



Mintel (2021). Supplements can support the wellness trend for pets.

Digestive Health

Healthy digestion is crucial for pets as it directly impacts nutrient absorption, energy levels, and comprehensive wellbeing. Pet parents want products that aid proper digestion, maintain overall gut health, and promote a strong immune system. Our broad portfolio of pre-, pro-, and postbiotic ingredients help to support digestive wellness.

55% of global pet parents want products with digestive health claims.⁴

Oral Health

Oral hygiene is a top priority for pet parents. Plaque and tartar build-up, along with chronic bad breath, are common areas of concern for consumers. As an alternative to costly cleanings and challenging daily brushing, pet parents are looking for functional products that support their pets' oral health, often in the form of treats.

57% of functional pet products are for Dental & Oral Care — by far the most important indication in the UK.⁵

Metabolic Health & Weight Management

Similar to their human parents, metabolic issues in pets impact everything from energy levels and weight management to overall vitality. Maintaining a healthy metabolism ensures that our furry family members remain active, fit, and free from chronic health conditions. To meet the growing demand for functional products in this area, our pro- and postbiotics can support pets' metabolic health.

The global pet obesity management market size is anticipated to reach \$14.5 billion by 2030, growing at a CAGR of 5.94%.⁶

⁴FMCG Gurus 2023

⁵Data from Euromonitor Consulting

⁶Global Research & Markets 2024



Why ADM?

As pet parents continue to prioritize their pets' health, ADM is leading the way with its expansive portfolio of microbiome solutions to support pet wellness.

Extensive Knowledge

ADM's scientists possess a deep understanding of the pet microbiome and the significant role a healthy gut plays in the comprehensive wellbeing of our pets.

Science-Backed Solutions

Our pre-, pro-, and postbiotics and enzymes are clinically studied and scientifically proven in both human and animal models to deliver effective wellness solutions for pets.

Understanding Today's Pet Parents

ADM's in-depth market research and analysis provides valuable insights into the preferences and concerns of today's discerning pet parents.

Custom, Turnkey Formulations

Our innovative formulations are flexible for use across a diverse range of applications that focus on pet health - from traditional supplements and soft chews to dental sticks and treats.

ADM is your go-to partner for navigating your brand's pet wellness challenges. Contact your regional sales representative to learn more about the products that are applicable to your region.



Contact us to learn how you can provide pet parents with the science-backed microbiome products they desire for their pets. petnutrition@adm.com

Let's Collaborate.

adm.com/en-us/products-services/pet-nutrition/categories/pet-supplements/

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