



VEGAN ANIMAL CARE REPORT

*Consumer motivations, barriers
and market potential*

2022

CONTENTS

| | |
|-----------------------------------|----|
| Introduction | 1 |
| Ethical and environmental motives | 2 |
| Health motives | 3 |
| The panel | 4 |
| Results | 5 |
| The Vegan Trademark | 11 |
| Conclusion | 13 |



INTRODUCTION

The popularity of vegan diets and lifestyles is increasing worldwide and this shift in mindset is mirrored in the way we care for the animals we share our homes with.

The [Pet Food Manufacturers' Association](#) estimates that about 59% of UK households shared their homes with a companion animal in 2021. Of these, by far the most common companion animals are dogs (33% of UK households, with an estimated 12.5 million dogs) and cats (27% of UK households, with an estimated 12.2 million cats). The industries involved in keeping these 24.7 million animals happy and healthy are booming, and ethical innovation in this category is on the rise.

A number of businesses have recently invested in the development of vegan foods for cats and dogs. These foods contain no animal-derived products, replacing animal proteins with protein-rich plants and other vegan ingredients, such as grains, lentils, rice, blueberries, carrots, peanuts and pumpkin. Fortification with vitamins and minerals ensures that the micronutrient needs of our animals are met.

Vegan dog food in particular is not as new as some people may think it is, as [V-dog](#) has been pioneering this category for over 40 years. It was the first commercially available meat-free dog food in the world, launching in 1980 in the UK under the name "Happidog". Plus, vegan cat food has already been on sale in the UK for 18 years.

Future Market Insights estimates that, in 2021, the global vegan dog food market was worth [\\$12.22 billion](#) and sales are expected to grow at an estimated 6.9% CAGR over the next decade. They also estimate that the global vegan cat food market is worth \$10,560.4 million and sales are set to grow at a 7.2% CAGR over the next decade.

Customer interest in this category is growing, but there is little publicly available information around what, or whom, is driving the market forward, and barriers to acceptance have been largely anecdotal.

In 2020, research by [Mintel](#) found that 34% of UK buyers of dog food believe it is good for dogs to regularly have a plant-based meal instead of a meat-based one. Overall, 43% said that they believed it is healthier to limit the amount of red meat eaten by 'pets', rather than not limit it at all. Mintel also found that younger shoppers are more open to the idea of vegan dog food: 40% of dog food buyers aged 16–24 were in favour of regularly giving plant-based meals, compared with just 21% of those aged 55+.

The increased development of vegan cat and dog food has led to debate in the media and among veterinary professionals and vegans. The Vegan Society understand that people with companion animals must seek to do what is best for them and that any changes to their diet should be considered with the utmost care and consideration. In this report, we will highlight research showing some of the ethical, environmental and health benefits that this growing industry could bring. Plus, we will provide new insights showing the public perception of the industry, barriers to purchase, and market potential for vegan cat and dog food – and beyond.



Lola

Credit: Lee Hawkins



WHY THE VEGAN SOCIETY DOES NOT SUPPORT THE USE OF THE WORD 'PET'
The Vegan Society strives to avoid language that promotes or reinforces speciesism in its communications. We use 'companion animal' instead of 'pet' and 'carer' or 'guardian' instead of 'owner', unless trying to draw attention to legal issues where terms like 'owners' and 'property' are necessary to reflect the current legal status of non-human animals.



ETHICAL AND ENVIRONMENTAL MOTIVES

Ethical

The UK is considered a nation of animal lovers. Many of us adore the animals we share our homes with and treat them like members of our family. But for many, the way we view different animals can be conflicting.

Cognitive dissonance is a theory of social psychology. It refers to the mental conflict that occurs when we hold two opposing viewpoints, which often leads to a misalignment of our thoughts and actions. This theory is regularly used in discussions around animal rights: why do we love some animals, but eat others? Although the ethics of eating animals is beyond this research, cognitive dissonance also occurs when feeding the animals we care for.

In 2019, research by [Dodd et al.](#) found that a large proportion of people living with cats and dogs were concerned about the ethical implications of their food. Their survey found that although 39% expressed concern about the welfare of the farmed animals used in commercially available food, 75% were worried about the nutritional completeness of plant-based diets for their companion animals.

For additional reading about the ethics of living with animals, see the 2018 Vegan Society blog titled "[Veganism and companion animals](#)".

Environmental

There are nearly 25 million cats and dogs living in the UK. The global number of cats and dogs is hard to estimate, but 2018 data from [Statista](#) puts it at around 844 million. Europe and the USA are thought to account for up to 70% of global sales of cat and dog food.

The environmental impact of feeding our beloved cats and dogs is huge. In 2017, research found that 25-30% of the environmental impacts of animal agriculture in the US may be attributed to cat and dog food.

Also in 2017, research by the [University of Edinburgh](#) found that an area double the size of the UK (about 49 million hectares) is needed to produce dry food (which accounts for 95% of food sales) for cats and dogs each year. In terms of greenhouse gas emissions, the study estimated that the production of dry food produces 106 million tonnes of carbon dioxide annually. To put this into context, a country producing the same amount of carbon dioxide would be the world's 60th highest emitter.

The study analysed 280 types of foods available across Europe and the USA. Researchers found that half of the dry food produced is made up of crop plants and the rest from various animals, including fish. The [environmental impact](#) of the global meat industry is well documented and any industries that are involved with this – including cat and dog food, ceramics (e.g. bone china) and the fashion industry – should be seriously considering less land intensive options.

HEALTH MOTIVES

When humans eat foods with poor-quality ingredients, our health can be negatively impacted. Cats, dogs and other animals also experience these negative effects.

The ingredient lists on commercial cat and dog food can be hard to decipher and this runs in parallel with [growing concerns](#) over the possible health implications. There has been an alarming increase in canine cancer and other diseases in recent years, some of which may be associated with poor-quality food ingredients.

The debate about whether it is ethical to feed cats and dogs a vegan diet is most heated when it concerns the animals' health. When living with a companion animal, it is our responsibility to ensure all their needs are met and there is legislation in place, such as the Animal Welfare Act 2006, to protect them.

In October 2021, [Andrew Knight](#), Veterinary Professor of Animal Welfare and Ethics at the University of Winchester, stated that [findings from his research](#) suggested that cats and dogs had as good – or better – health on plant-based diets as when fed on meat-based 'pet' foods, providing that the plant-based meals were formulated with additional nutrients. His findings came after warnings that animal carers could be in breach of the Animal Welfare Act 2006 if they failed to feed a 'suitable diet' that met their dog's nutritional needs.

It is widely accepted that dogs are omnivores and can absorb nutrients from a variety of sources. By contrast, cats are carnivores and need several proteins and amino acids in their diet, such as taurine, to thrive. [The Pet Food Manufacturers' Association](#) (a trade body that represents the UK 'pet' food industry) says that dogs can adapt well to a meat-free diet, whereas more care must be given to a cats as they have highly specific nutritional needs. It is important to note that vegan cat and dog foods are developed by expert animal nutritionists, following the same nutritional guidelines as all commercial foods and produced in highly regulated facilities.

Professor Knight points out that some nutrients are typically degraded in highly processed commercial foods and need to be added back into the food synthetically.

For further insights into the nutritional aspects of vegan foods for cats and dogs, you can read [The Nutritional Soundness of Meat-Based and Plant-Based Pet Foods](#), by Andrew Knight and Natalie Light.

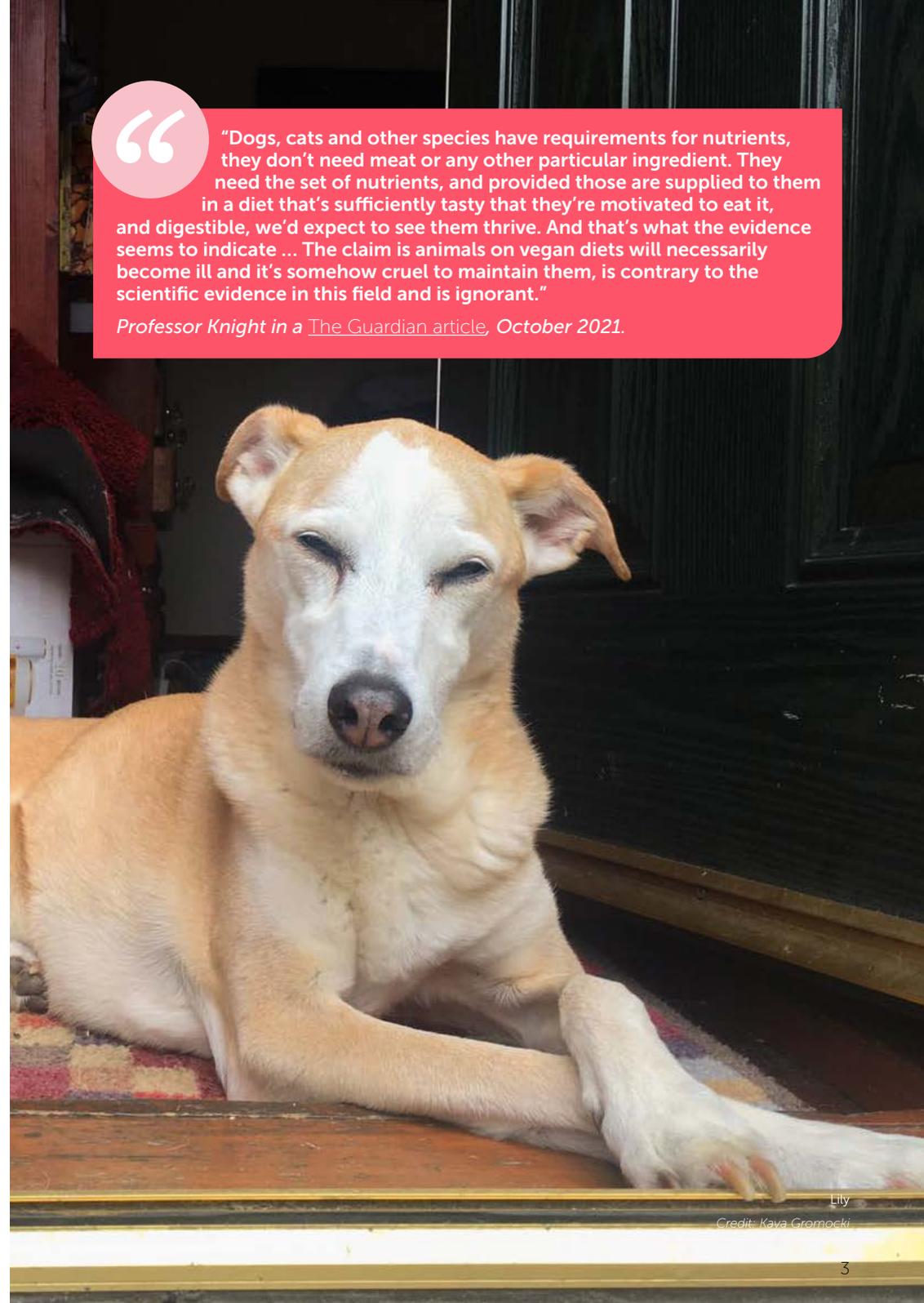


Sully
Credit: Ericka Durgahee

“

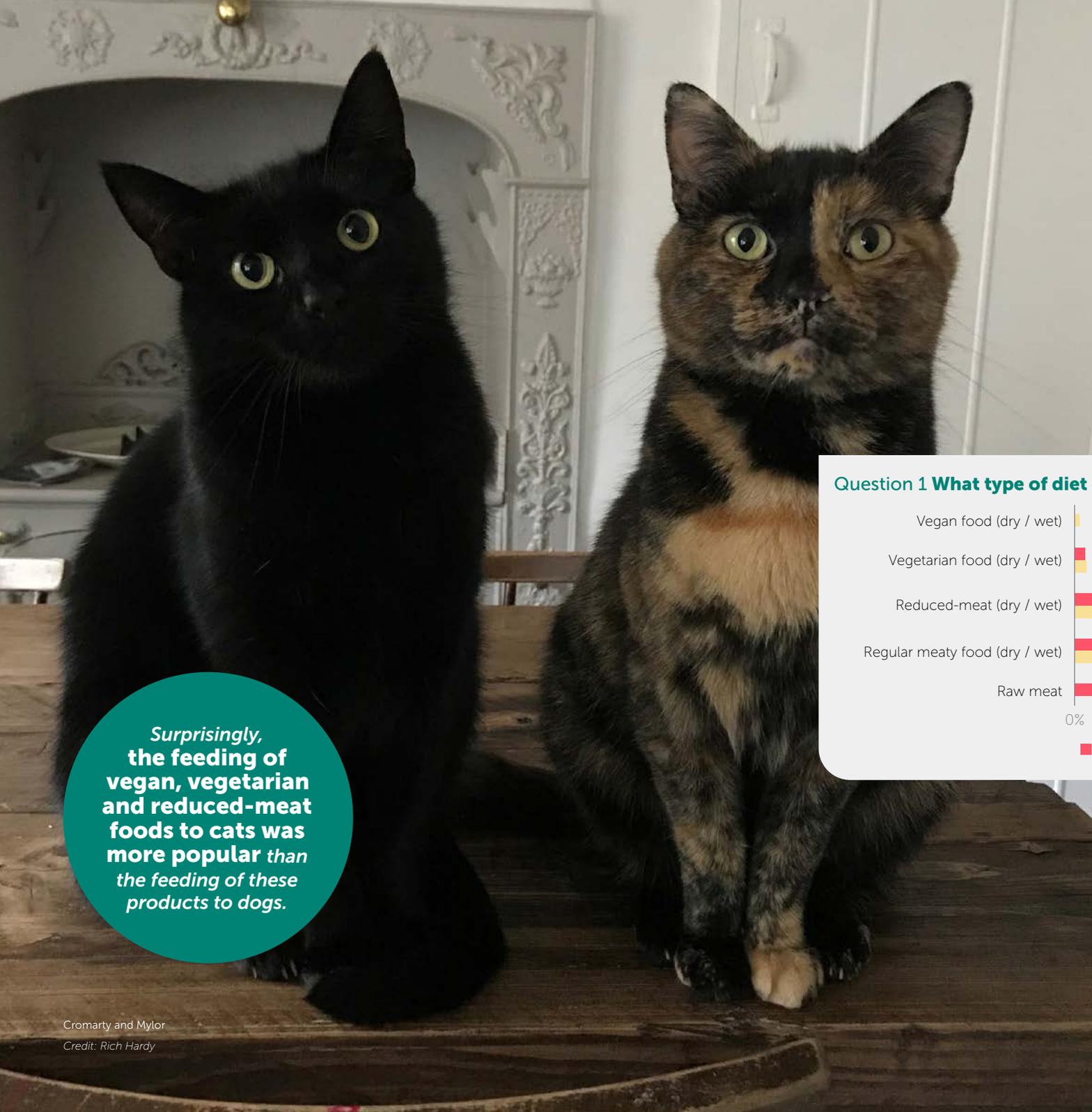
“Dogs, cats and other species have requirements for nutrients, they don't need meat or any other particular ingredient. They need the set of nutrients, and provided those are supplied to them in a diet that's sufficiently tasty that they're motivated to eat it, and digestible, we'd expect to see them thrive. And that's what the evidence seems to indicate ... The claim is animals on vegan diets will necessarily become ill and it's somehow cruel to maintain them, is contrary to the scientific evidence in this field and is ignorant.”

Professor Knight in a [The Guardian article](#), October 2021.



Lily

Credit: Kaya Gromocki



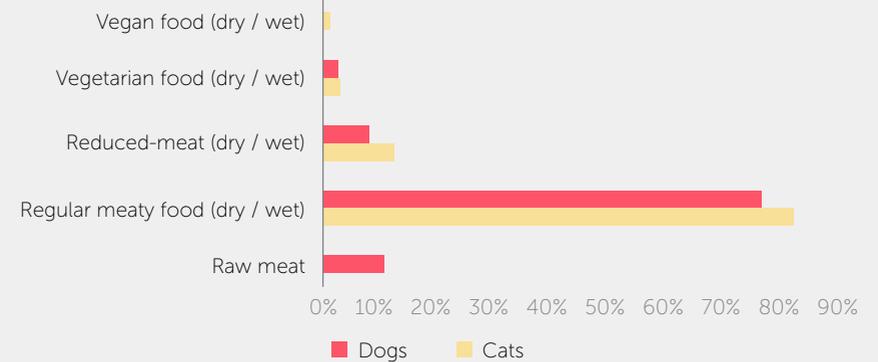
THE PANEL

In October 2021, The Vegan Society used [Attest](#) to survey 1000 people in the UK on their views regarding vegan products for cats and dogs. All the respondents currently lived with companion animals.

As the feeding and care of cats and dogs are not comparable, the surveys were run and analysed separately: 500 respondents answered one survey relating to just dogs and a further 500 respondents answered another survey relating to just cats. Three rounds of data quality checks took place before analysis.

Data were also collected for age, gender and home region.

Question 1 What type of diet does your companion animal primarily eat?



Surprisingly, the feeding of vegan, vegetarian and reduced-meat foods to cats was more popular than the feeding of these products to dogs.

To give more context to this question and the results, it is worth remembering that although interest in veganism is increasing, the latest and most robust figures for the number of vegans in Great Britain is about 1.16% of the adult population. So, it was no surprise that the percentage of people on the panel who said they fed vegan food to their cats (1.2%) and dogs (0.2%) was low.

Surprisingly, the feeding of vegan, vegetarian and reduced-meat foods to cats was more popular than the feeding of these products to dogs.

RESULTS

We asked the respondents who fed their cats and dogs either vegan, vegetarian or reduced-meat food their motivations behind this decision. Although the total number of respondents in the survey was 1000, the number answering these specific questions was 146, as detailed in the bar chart.

The health of their respective companion animals came out as the number one reason for both cats (39.8%) and dogs (40%), with dogs' preference for the products coming a very close second (38.3%). Cats' preference for the products was a noticeably lower percentage, with 23.9% of the respondents selecting this option.

Food innovation in the vegan and meat-free category – and beyond – is increasing year-by-year and shoppers are curious about these new products. The seeking out of new products and trends also echoes throughout the cat and dog food industry. For those with cat companions, 27.3% said they fed their cats vegan, vegetarian or reduced-meat food because they liked to try new products and 15.9% said it was because it seemed 'on trend'. For those with dog companions, these figures were 23.3 and 16.7%, respectively.

Recommendations from various people also influenced shoppers' decisions. Encouragingly, vets and animal specialists had a fairly significant influence on our panel. A total of 27.3% of those feeding cats a vegan, vegetarian or reduced-meat diet said they had been influenced by a professional; for those with dogs, the figure was 25%. About 20% of both panels said that their friend or someone they knew had recommended it.

Motivations around ethics and the environment were surprisingly low among the two panels. A total of 22.7% of those with cat companions and 21.7% of those with dog companions said that they fed their animals a meat-free or reduced-meat diet because it aligned with their ethical beliefs. Environmental concerns were slightly lower, with 20.5% of those with cats and 21.7% of those with dogs selecting this option. As a result of the low response rate, we grouped together respondents who said they fed their animal companions a vegan, vegetarian or reduced-meat diet. We anticipate that those who fed their companion animals a solely vegan diet would hold ethics and environmental concerns as more influential in their decision.

Unfortunately, our sample size was too small to draw any firm conclusions.

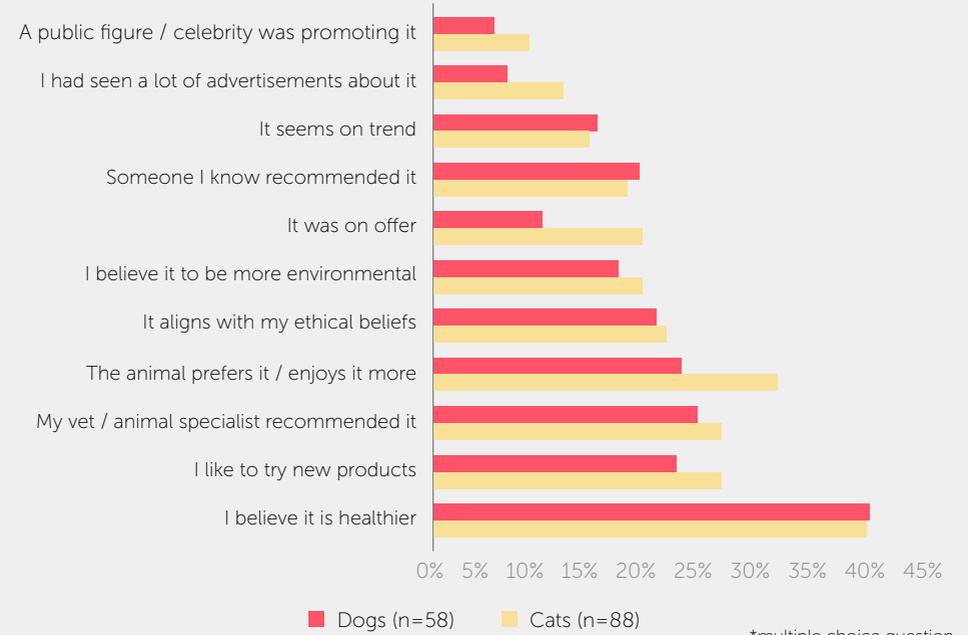
Other influences included promotional offers (cat carers 20.5%, dog carers 11.7%), advertisements (cat carers 13.6%, dog carers 8.3%) and celebrity endorsements (cat carers 10.2%, dog carers 6.7%).



Casper
Credit: Katie Grant



Question 2* Which of the below are the main reasons as to why you feed your dog / cat a reduced meat, vegetarian, or vegan diet?



■ Dogs (n=58) ■ Cats (n=88)

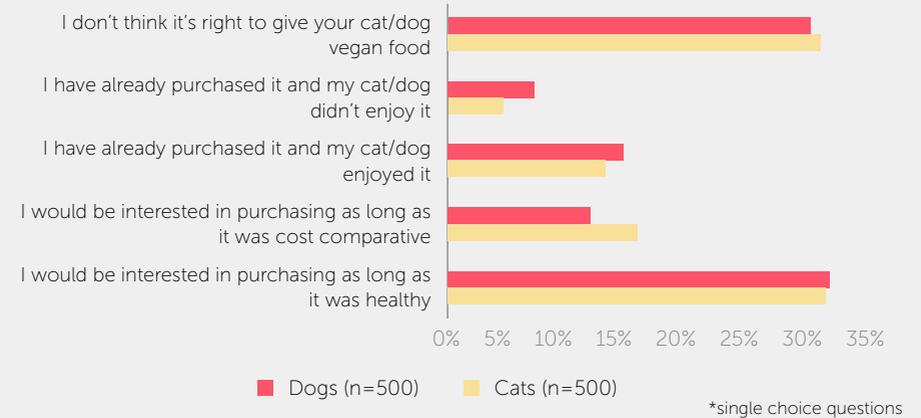
*multiple choice question

Ingo
Credit: Rich Hardy



Sully
Credit: Ericka Durgahee

Question 3* Which of the below best describes your opinion on vegan cat/dog food?



We asked both panels about their opinion of vegan foods for cats and dogs and the results were fairly similar between the two.

A total of 31.8% of those with cats and 32% of those with dogs said they would be interested in purchasing vegan food for their companions as long as it was healthy.

For some of the panel, the price of vegan foods came out as the top reason for a potential purchase, with 17% of those with cats and 13% of those with dogs saying they would purchase vegan food for their animal companions as long as it was comparable in cost to non-vegan food.

A sizeable proportion of the panel had already purchased vegan cat and dog food. For those with cats, 14.4% said they had purchased it and their cat enjoyed it, whereas 5.4% said they had purchased it and their cat didn't enjoy it. For those with dogs, 15.8% said that they had purchased it and their dog enjoyed it and 8.4% said that they had purchased it and their dog did not enjoy it.

A fairly large proportion of both panels (31.8% of those with cats and 32% of those with dogs) said that they did not think it is right to give companion animals vegan food.



Parker
Credit: Lauren Williams

Question 4: Can you explain the reason for your previous answer?

Following on from the last question, we used an open text question to ask all the respondents who said that they did not think it was right to give vegan food to cats or dogs their reasons for this.

One hundred and fifty respondents from the dog survey answered this question. Of these respondents:

- A total of 113 (75.4%) said it was because 'dogs need meat' in their diet to survive.
- A total of 22 (14.7%) explicitly said it was because 'dogs are carnivores'.
- A few panellists spoke of the relationships between wolves and domesticated dogs, using this as a reason to confirm that, to them, 'dogs are carnivores'.
- Some mentioned they would be concerned for the health of their dog or a lack of vitamins.
- Other were concerned about the morality of this – that is, it might be cruel to switch your dog's diet as dogs cannot make moral decisions themselves.

Typical quotes included:



"Dogs are descendants of wolves that are carnivores, it is their nature to eat meat, unlike the human who is an omnivore"

"Wild dogs wouldn't eat a vegan diet so why should a domesticated dog?"

"Dogs are genetically designed to eat meat they need certain nutrients and vitamins from meat that you don't get from vegan food"

"My dog is unable to make a decision for himself so I think it would be unfair"

"Dogs don't have the ability to make moral decisions"

It is well known that dogs are not carnivores, but omnivores, allowing them to consume and absorb nutrients from a variety of plant sources. The subject of morality is beyond the scope of this research, but is interesting to note.

One hundred and fifty-three respondents from the cat survey answered this question. From these respondents:

- A total of 126 respondents (82.4%) said it was because 'cats need meat' in their diet to survive.
- A total of 37 respondents (24.2%) explicitly said it was because 'cats are carnivores'.
- A few panellists spoke of cats being natural hunters with predatory instincts.

Typical quotes included:



"Cats are by nature meat eaters. It is unfair of us to instil our choices around eating meat on an animal that cannot give its opinion"

"They can't speak so how can we ensure they are getting what they need from it and feeling full after"

"Cats can't decide what they eat my themselves, they would still eat mice etc so what's the point in vegan cat food?"

It is well known that dogs are not carnivores, but omnivores, allowing them to consume and absorb nutrients from a variety of plant sources.

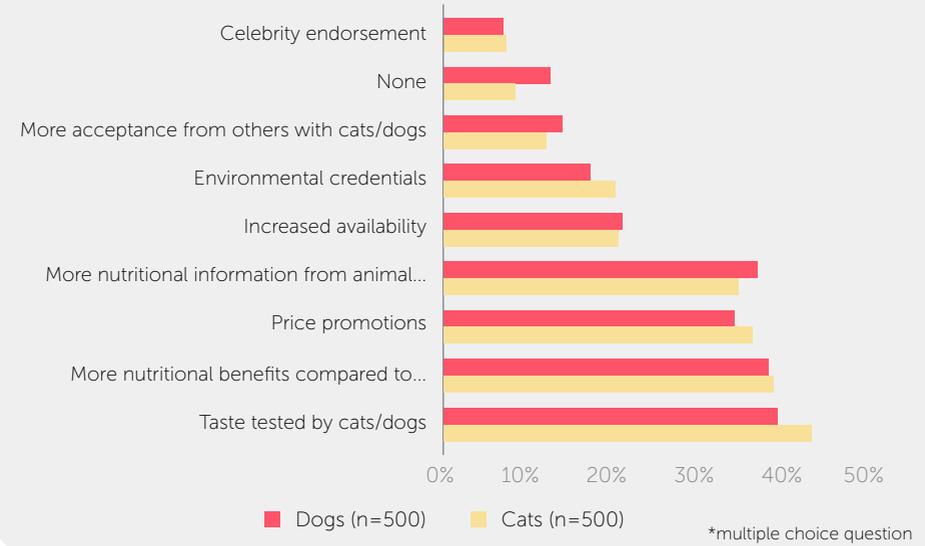




In 2021, a large, published study reported that cats and dogs enjoyed vegan food at least as much as meat-based foods.

Ruby
Credit: Sean Curry

Question 5* Which of the below would influence you to purchase vegan cat/dog food in the future?



We asked the two panels what would influence them to purchase vegan cat and dog food in the future. This question was put to all panellists, including those who said they didn't think it was right to give cats and dogs vegan food.

In 2021, a large, [published study](#) reported that cats and dogs enjoyed vegan food at least as much as meat-based foods. This is good news, as taste approval from our furry friends came out as the most popular options for both panels, with 39% of those with dogs and 43.7% of those with cats selecting this.

Increased nutritional benefits compared with regular food was a close second, with 38% of those with dogs and 38.7% of those with cats selecting this.

Price promotions (36.1% for those with cats and 34.4% for those with dogs) and increased availability (21.8% for those with cats and 22% for those with dogs) were also viewed as a key driver for potential purchase. These are likely to improve in the coming years as the market develops.

Approval from animal experts was a key concern for both panels. A total of 37% of those with dogs and 25.3% of those with cats selected this option. It is vital that any current or future foods brought to market for cats, dogs and other animals have approval from animal specialists. As this market develops, we hope that the brands and businesses behind these products continue to create robust and transparent relationships with those working in the veterinary and animal care fields.

Environmental credentials were less important to shoppers (20.8% for those with cats and 18% for those with dogs), as was acceptance from others with companion animals (20.8% for those with cats and 18% for those with dogs) and celebrity endorsement (8.2% for those with cats and 7.8% for those with dogs).

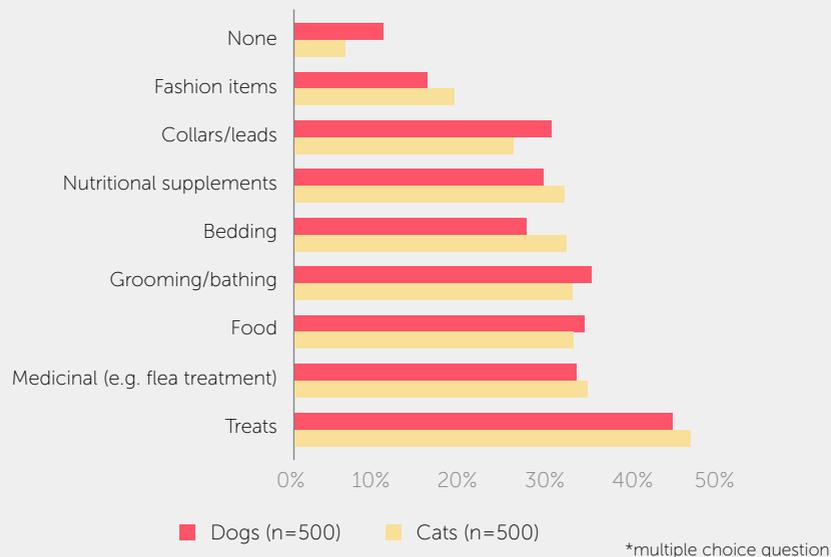
Overall, 14% of those with dogs and 9.4% of those with cats said that there was nothing that could influence them to purchase vegan food for their companion animals.

Although most of the panel showed an interest in purchasing vegan food for their cats and dogs, it is clear that there are still many ways in which the industry could help to inform potential customers and promote their products.

We asked both panels, including those who were not interested in vegan cat and dog food, if there were any other categories where they would like to see more vegan products for cats and dogs.

The results were fairly similar between the two panels.

Question 6* In which of the following product ranges would you like to see more vegan products for cats/dogs?

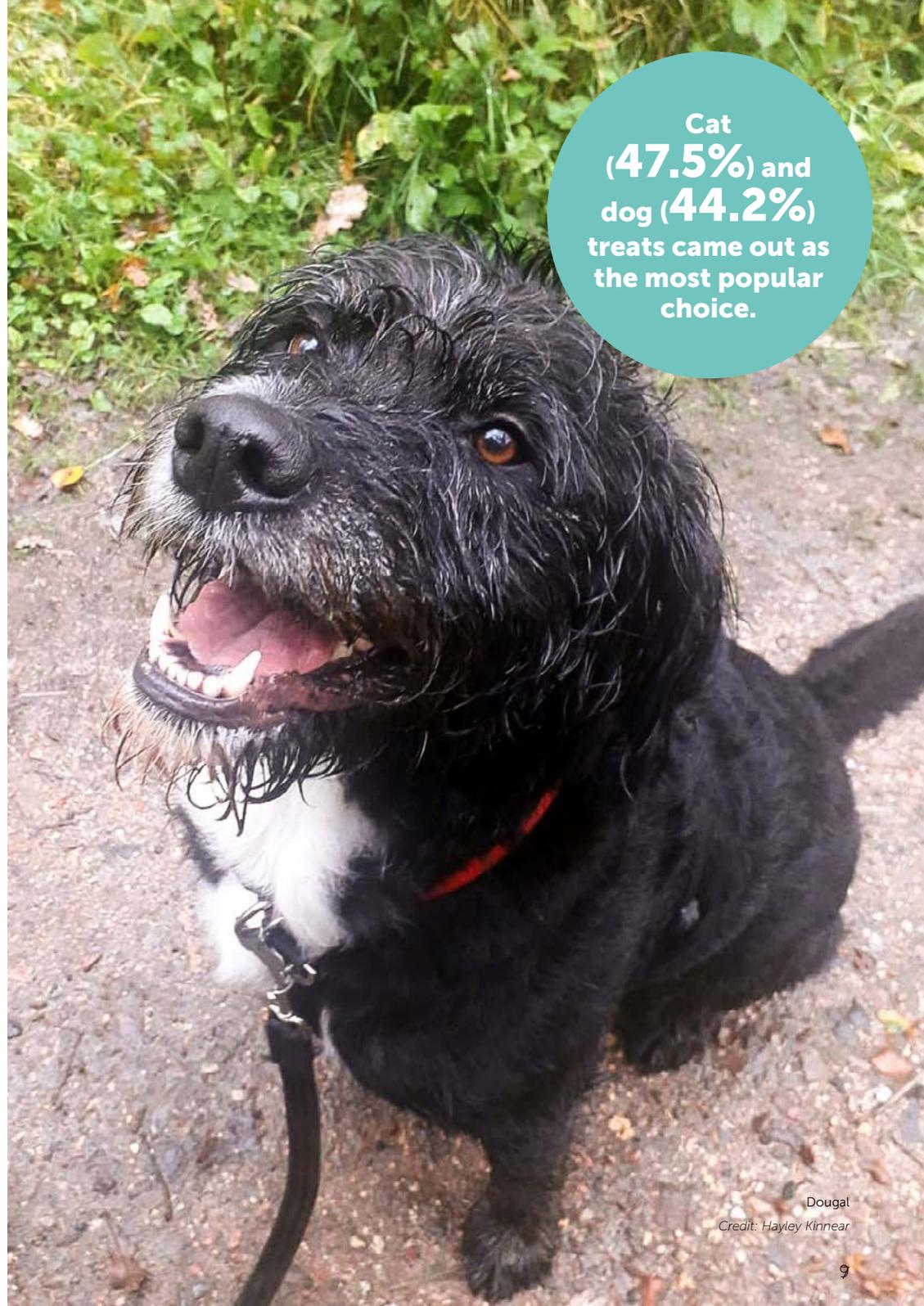


Somewhat surprisingly, cat (47.5%) and dog (44.2%) treats came out as the most popular choice in both panels, indicating that there is a strong interest in ethical food products among our audience, but there is a hesitance for this to be at every meal time.

Vegan medicinal products, such as flea treatment, scored highly on both panels. If medicinal products can work equally well without animal-derived ingredients, then this industry has a real opportunity to be kinder to all animals – not just those we share our homes with.

Despite some critique among the panel, a sizeable number of respondents were still keen to see the development of vegan cat (32.8%) and dog (34.4%) food, which is good news for this growing market.

Toiletry products for humans – such as toothpaste, shampoo and body moisturiser – can contain [animal-derived ingredients](#) and the same is true for animal grooming products. If your companion animal likes to be pampered, then there is a growing number of products to help. Thankfully, a fair number of those with cats (32.2%) and dogs (35.4%) were keen to see more of these products developed as vegan.



Cat (47.5%) and dog (44.2%) treats came out as the most popular choice.



Question 7 How interested are you in purchasing vegan dog grooming/bathing products such as shampoo, coat conditioner, etc?



Separate to this question, we asked just those answering the survey about dogs a further question regarding their potential interest in vegan grooming products. As already mentioned, the care of cats and dogs is not comparable and each species comes with unique caring responsibilities. As the market for dog bathing products, such as coat conditioner, is more established than that for cats, we only asked this question to those living with dogs.

Overall, 76% of the panel said that they were interested in purchasing vegan grooming products for their dogs. When breaking this down, 13% said that they had previously purchased such products and 43.2% said they were interested as long as they worked. A total of 19.4% said they were interested, but there wasn't much currently available – we hope to change this as we work with more brands and suppliers.

24.4% of the panel said that they were not interested in vegan grooming products. The primary reason for this was that they were happy with what they used already (13.2%); others said that their dog's skin was sensitive (3%) and 8.2% were not interested at all.

More vegan cat (31.2%) and dog bedding (28.2%) was also fairly popular among the panel. Many animal beds are made of leather, wool or stuffed with goose feathers and down, so it is promising to see an interest in more ethical products that can comfort one animal without harming another. In February 2021, a dog bed called [bECOsy®](#) (with smaller sizes suitable for cats) became the first in the world to be registered with The Vegan Society's Vegan Trademark. bECOsy® beds are created using oxford cloth, natural latex, faux Sherpa fleece and polyester.

Nutritional supplements may be needed from time-to-time, in particular for older animals or those with health conditions. Our panel was keen to see more vegan nutritional supplements for their furry friends, with 31.6% of those with cats and 29.6% of those with dogs selecting this option.

The public's attitude towards products made from leather has been starting to change in recent years. With innovative and sustainable materials on the market such as [Piñatex](#) – a vegan textile created from pineapple waste that acts, looks and feels like leather – it is becoming increasingly hard to justify the use of animal leather. Leather is used for many different products, including collars, leads and harnesses for cats, dogs and other animals. In our panel, 26.6% of those with cats and 30.4% of those with dogs said they wanted more vegan products in this category.

There may be times when cats and dogs need to wear 'fashion items' – for example, when recovering from an operation to prevent grooming or to keep them warm and dry when out and about. [Fashion supply chains](#) can be full of animal-derived ingredients, including printing inks, glues and the materials themselves. On our panel, 19.5% of those with cats and 17.4% of those with dogs said they were keen to see more vegan fashion items for their companion animals.

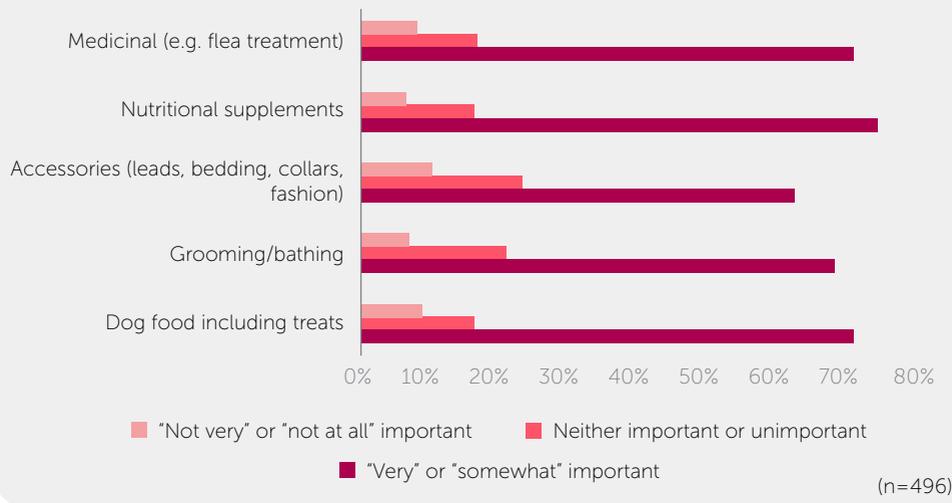
In total, only 7.4% of those with cats and 11.2% of those with dogs said that they were not interested in any vegan products in any category. Considering this survey was answered by all different types of people, we consider this a great result.



THE VEGAN TRADEMARK

In this section of the survey, we told the panel that there is no legal definition of the term vegan, so brands are free to use this terminology for products without it being checked or regulated by any authority. Third-party verification schemes exist to ensure that products meet verified vegan standards. In these schemes, audits ensure that the products' manufacture, development and ingredients are free from animal ingredients and animal testing.

Question 8 How important is it to you that the following vegan products for dogs have an independent third-party verification to check their vegan credentials?



For those with dogs, the majority of the panel said that it was either 'very' or 'somewhat' important for brands to register their vegan products with a certification scheme. This was most important for nutritional supplements (74.6%), medicinal products (72.4%) and dog food (72.2%), but grooming products (69.2%) and accessories (63.3%) also scored favourably.

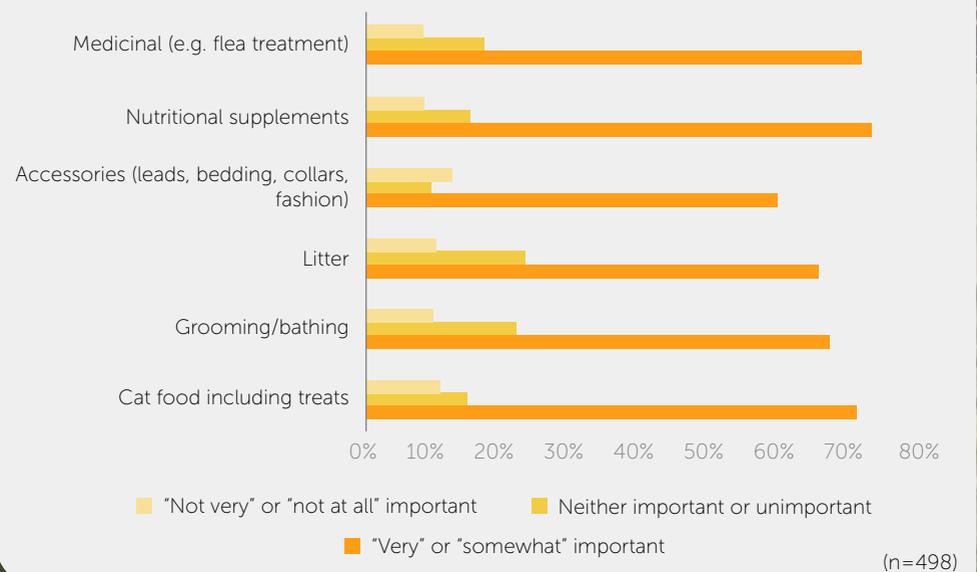
For those with cats, the results were similar, with the majority of the panel saying it was either 'very' or 'somewhat' important for brands to register their vegan products with a certification scheme. Once again, this was most important for nutritional supplements (74.1%), medicinal products (72.7%) and food (72.1%). Grooming products (67.7%), litter (65.5%) and accessories (60.4%) were also in the majority.



Bryher
Credit: Rich Hardy



Question 8 How important is it to you that the following vegan products for cats have an independent third-party verification to check their vegan credentials?

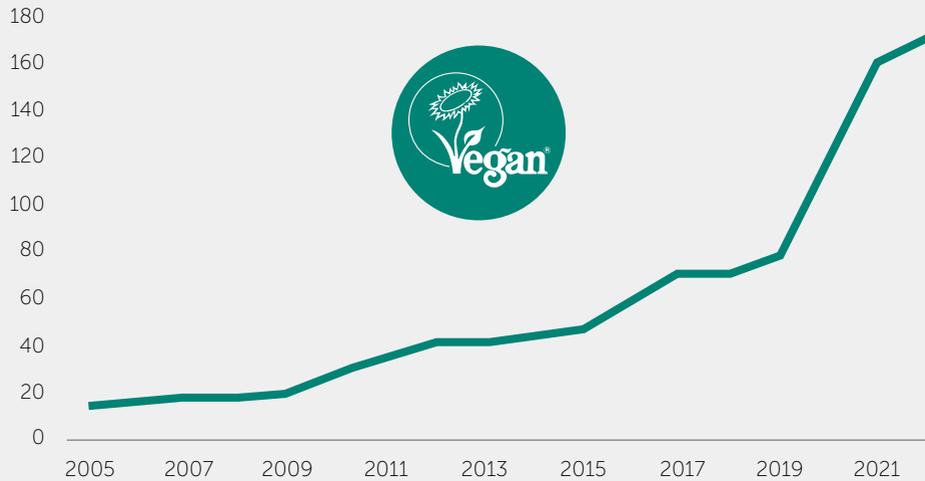


Cromarty
Credit: Rich Hardy

Thankfully, the [Vegan Trademark](#) is here to help, and since 1990 has been helping users identify that a product is free from animal ingredients.

At the time of writing (January 2022), 171 animal care products have been registered under the Vegan Trademark's rigorous vegan standards and we expect this to grow rapidly in the coming years.

Vegan Trademark registrations for animal care products



- In 2005, [Simple System](#) became the first brand to register animal care products with the Vegan Trademark. They are still proudly registered with us today.
- [Benevo](#), founded in 2004, is one of the oldest and largest vegan cat and dog food brands in the UK. At present, they are one of the few businesses selling commercially available vegan cat food in the UK.
- We work with a small but growing number of other brands selling vegan dog food, snacks and treats, including [Yarrah](#), Pawtato and Vegusto.
- There are many vegan grooming products registered with the Vegan Trademark, including those by [allPaws](#), [Faith in Nature](#), [Little Soap Company](#), [Obvs Skincare](#), [ProGroom](#) and [Wilda Siberica](#).
- Nutritional supplements registered with the Vegan Trademark include those by [Broadreach Nature](#) and [Flax Farm](#).
- A selection of vegan dog toys by [Hevea](#) are registered with the Vegan Trademark, along with dog/cat beds by bECOsy.
- About 50% of our product registrations in the animal care category have come in the last two years alone (2019–2021), showing exponential growth in this category.

At the time of writing, 171 animal care products have been registered under the Vegan Trademark's rigorous vegan standards and we expect this to grow rapidly in the coming years.



CONCLUSION

Many parts of the animal care industry are ripe for innovation, but this must be considered with the utmost care and guidance by animal experts when it comes to animal health.

As consumers become more aware of the ethical and sustainability implications of their purchases, we are seeing an increasing trend, across all sectors, in the demand for transparency and credibility from businesses. Younger generations in particular are choosing to spend money on products produced by ethically sound and environmentally credible businesses. Movement to fulfil this requirement is already being seen in the production and sale of animal care items and is reinforced by a development towards treating companion animals as members of the family. New innovations in green and ethical toiletries and fabrics are now keeping pace with this demand, so that non-food items for cats, dogs and other animals – such as ‘fashion items’ and grooming products – can and should be made with the ethical implications of all animals in mind.

If you are a brand interested in providing vegan-verified animal care products and want recognised and trusted credentials for your vegan claims, you can contact our Vegan Trademark Team on TMSales@vegansociety.com.

If you shop for animal care products and want more vegan-verified options – such as food, bedding or grooming products – you can contact brands and let them know the Vegan Trademark is here to help.

If you require more information about this report, would like more information about the data, or if you are interested in personalised research for your business or research collaborations, please contact insights@vegansociety.com.

Registered Charity No. 279228 (England & Wales) and SC049495 (Scotland).
Registered Co. Nos. 01468880 and 12377572 (England & Wales). VAT Registration No. 361 7274 92.

Ruby
Credit: Sean Curry



Ebby
Credit: Kaya Gromocki