Pet Product Retailing in the U.S.: Channel Competition and Consumer Shopping Trends, 2nd Edition

Description: Pet Product Retailing in the U.S.: Channel Competition and Consumer Shopping Trends, 2nd Edition

In August 2015 Petco announced that it would launch an IPO - less than a year after competitor PetSmart made headlines announcing that the pet specialty giant agreed to be sold to a group led by investment firm BC Partners for $8.7 billion. As the two largest pet specialty retailers, Petco and PetSmart had sales in 2014 exceeding $11 billion, according to Packaged Facts. The total includes PetSmart's sales in Canada. Services accounted for close to 10% of the total. Combined, the two retailers account for more than 20% of all pet product sales in the U.S.

Pet Product Retailing in the U.S.: Channel Competition and Consumer Shopping Trends, 2nd Edition provides retailers and marketers with valuable insight into pet product retail channel trends and consumer shopping patterns across all of the major pet product shopping venues in the U.S., including supermarkets, discount stores, wholesale clubs, drugstores, convenience stores, pet superstores, other pet chains and independents, Internet, veterinarians, natural supermarkets, dollar stores, agricultural/feed-seed/farm stores, home improvement/garden centers, and closeout stores.

In the pet retail arena, pet specialty continues to battle it out with mass market retailers, with pet superstores succeeding in growing their customer base over the past five years, but supermarkets and mass merchandisers still in the lead in terms of market penetration. Premiumization is still in full force, but after the first major wave of upsaling in the first decade of the 2000s, many pet owners have already traded up and, with the onset of economic instability, scaled back some as well. Packaged Facts’ pet owner surveys reveal that between 2010 and 2014, the percentage of consumers who agreed that they were spending less on pet products because of the economy grew from 27% to a high of 35% in 2013, dropping back to 30% in 2014. More alarming for pet product marketers, the percentage of pet owners who disagreed to spending less plummeted from 55% in 2010 to 38% in 2014. Despite consumer hesitance, the pet market’s above-average prospects have continued to attract new players, expanding the range of retailers vying for a slice of the pie.

Scope and Methodology

Relying heavily on Packaged Facts' proprietary quarterly consumer surveys, the report provides an in-depth analysis of consumer shopping behavior and attitudes across channels, and puts in context industry-wide developments that impact where pet owners shop. The report also presents trended national consumer survey results from Experian Marketing Services' Simmons surveys. Coverage includes breakouts of pet product sales by retail channel; trended rates of channel usage and loyalty; cross-channel trends including impact of recession and ongoing economic sluggishness; role of channel exclusivity or expansion among major marketers and brands; private-label impact; and the role of premium products in the New Normal economy. Key channels and chains covered include:

- Core mass channels including supermarkets, discount stores/mass merchandisers, wholesale clubs, drugstores, and convenience stores
  - Natural supermarkets including Whole Foods and Trader Joe's
  - Pet specialty independents and chains including PetSmart and Petco
  - Veterinarians
  - Internet
  - Dollar Stores
  - Other alternative channels

For each major channel, the report provides trended household purchasing and channel-loyalty rates, as well as demographic and psychographic shopper profiles. Extensive on-site research is documented in text and illustrated with photographs of in-store departments, brand selection, and promotions.

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Luxury Retailers
Food Co-ops
Farms and Farm Markets
Gourmet Food Shops and Country Markets

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