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

Description:
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 upscaling 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 breakdowns 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.

Contents:
Chapter 1: Executive Summary
Introduction
Scope of Report
Data Sources and Methodology
Competition Remains Fierce in Pet Retail Market
Pet Owners Cautious
Shopping Around
Private-Label Opportunities
Channel Usage
Pet Product Purchasing Rates by Channel
Walmart Tops Recent Shopper List
Pet Owners Skew High for Internet-Related Practices
Channel Loyalty
Two-Thirds of Pet Product Shoppers Are Channel-Loyal
Figure 1-1: Channel Choice of Pet Product Purchasers Who Buy Pet Products Through One Main Channel, 2014 (percent)
Channel Loyalty Is Down Overall
Reasons for Shopping Vary by Channel
Mass-Market Channels
Mass Channels Largest Percentage of Dog or Cat Owners as Pet Product Shoppers
Supermarkets
Discount Stores, Mass Merchandisers and Supercenters
Wholesale Clubs
Drugstores/Convenience Stores
Pet Specialty Channels
A Growing Shopper Base
Purchasing Rates by Product Type
PetSmart and Petco Continue to Advance in Pet Products and Services
Other Pet Specialty Chains
Independent Pet Store Trends: An Uphill Battle
Internet Channel
Chapter 1: Executive Summary [Cont.]
“Digital Future” Is Here
Online Sales of Pet Products Picking Up Speed
Online Purchasing Rates
Figure 1-2: Level of Agreement with Statement: “I am buying pet products online more than I used to,” 2012-2014 (percent)
Amazon: The Future of Pet Retail?
Other Channels
Veterinary Channel
Natural Supermarket Channel
Food Safety Still a Factor for Pet Owners
Dollar Store Channel
Alternative Channel Options
Chapter 2: Introduction
Scope of Report
Competition Remains Fierce in Pet Retail Market
Table 2-1: U.S. Retail Channel Sales of Pet Products by Category: Food vs. Nonfood, 2013-2014 (in billions of dollars and percent change)
Table 2-2: Share of U.S. Retail Channel Sales of Pet Products Market by Channel Classification, 2014 (percent)
Figure 2-1: Share of U.S. Retail Channel Sales of Pet Products Market by Channel Classification, 2014 (percent)
Pet Owners Cautious
Figure 2-2: Overview of Change in Financial Situation of Pet Owners Compared with 12 Months Ago, Summer 2014 (percent)
Table 2-3: Level of Agreement with Statement: “I am spending less on pet products because of the economy,” 2010-2014 (percent)
Figure 2-3: Level of Agreement with the Statement: “I am spending more on pet food and treats these days,” Dog Owners vs. Cat Owners, 2014
Figure 2-4: Level of Agreement with the Statement: “I am spending more on nonfood pet supplies these days,” Dog Owners vs. Cat Owners, 2014
Figure 2-5: Level of Agreement with the Statement: “I am spending more on professional pet care services these days,” Dog Owners vs. Cat Owners, 2014 (percent)
Table 2-4: Level of Agreement with Statement: “Many pet products are becoming too expensive,” 2011-2014
Figure 2-6: Level of Agreement with Statement: “I look out for lower prices, special offers, and sales on pet products,” 2014 (percent)

Chapter 2: Introduction [Cont.]

Table 2-5: Retail Channel Purchasing Patterns for Pet Products: By Change in Financial Situation of Pet Owners Compared with 12 Months Ago, Summer 2014 (percent)

Table 2-6: Retail Channel Purchasing Indexes for Pet Products: By Change in Financial Situation of Pet Owners Compared with 12 Months Ago, Summer 2014 (index)

Figure 2-7: Level of Agreement with Statement: “I shop for pet products at a variety of stores,” 2011 vs. 2014 (percent)

Table 2-7: Usage Rates for Pet Food Coupons: By Change in Financial Situation of Dog or Cat Owners Compared with 12 Months Ago, Summer 2014 (percent)

Table 2-8: Usage Rates for Pet Food Coupons: By Household Income Bracket of Pet Owners, Summer 2014 (percent)

Figure 2-8: Percent Who Use Pet Food Coupons: Dog Owners vs. Cat Owners, 2011-2014 (percent)

Table 2-9: Demographics for Pet Owners Who Use Pet Food Coupons, 2014 (number, percent, and index)

Table 2-10: Pet Food Purchasing by Price Level, 2014 (percent)

Private-Label Opportunities

Table 2-11: IRI-Tracked Sales of Pet Products by Food and Nonfood Category and Segment: Total vs. Private Label, 2013 vs. 2014 (in millions of dollars)

Table 2-12: Private-Label Share of IRI-Tracked Sales of Pet Products: By Food and Nonfood Category and Segment, 2013 vs. 2014 (percent)

Despite Interest, Consumers Hesitate to Embrace Private Label

Figure 2-11: Level of Agreement with Statement: “I am buying more store brand pet products these days,” Dog Owners vs. Cat Owners (percent)

Table 2-13: Purchasing Patterns for Selected Types of Store-Brand Dog and Cat Food: By Retail Channel Shopped, 2011 vs. 2014 (percent)

Ongoing Interest in Premium, Natural, Health Products

Table 2-14: Level of Agreement with Statement: “I consider natural and organic pet foods to be safer than regular pet foods,” 2014, Pet Owners Overall vs. Natural Pet Product Purchasers (percent)

Table 2-15: Level of Agreement with Statement: “If natural/organic pet products were more affordable where I shop, I would buy them more often,” 2012 vs. 2014 (percent of pet product purchasers)

Figure 2-12: Percentage of Consumers Who Especially Look for Organic/Natural Foods Generally vs. Use Any Organic Foods: Households Overall, Dog Owners, and Cat Owners, 2012 vs. 2014

Table 2-16: Wellness/Ingredient-Related Pet Purchasing Attitudes, Any Agreement, 2014 (percent of pet owners)

The Organic Pet Food Purchaser

Table 2-17: Overview of the Organic Pet Food Purchaser, 2014 (percent, number and index of dog- or cat-owning households)

Human/Pet Bond Impacts Pet Spending

Figure 2-13: Pet Owner Attitudes and Behavior Characterizing Human/Animal Bond, 2014 (percent)

Table 2-18: Purchasing Overview for Selected Pet Accessories by Leading Retail Channel Shopped by Pet Owners, 2014 (percent)

Table 2-19: Purchasing Overview for Selected Pet Accessories by Leading Retail Channel Shopped by Pet Owners, 2014 (index)

Table 2-20: Purchasing Indexes for Selected Dog Products and Brands by Leading Retail Channel Shopped by Dog Owners, 2014 (overall percent and index by channel)

Table 2-21: Purchasing Indexes for Selected Cat Products and Brands by Leading Retail Channel Shopped by Cat Owners, 2014 (overall percent and index by channel)

Chapter 3: Channel Usage

Data Sources and Methodology

Pet Product Purchasing Rates by Channel
Table 3-1: Household Purchasing Overview for Pet Products by Retail Classification: U.S. Households Overall vs. Pet Owners, 2014 (number and percent)
Table 3-2a: Purchasing Rates for Pet Products by Selected Retail Channels and Pet Superstore Chains: 2010–2014 (percent of pet owners)
Table 3-2b: Purchasing Base for Pet Products by Selected Retail Channels or Pet Superstore Chains: 2010–2014 (U.S. pet owners in thousands)
Walmart Tops Recent Shopper List
Table 3-3: Channel Choices for Pet Product Shopping in Last 3 Months: Pet Food, Pet Medications, Other Pet Supplies, 2014 (percent)
Table 3-4: Amount Spent on Pet Products in Last 30 Days, 2014 (percent)
Income Relationship to Channel Selection
Table 3-5: Median Household Income and Average Household Income by Retail Purchasing Classification for Pet Products: Pet Owners, 2014 (in thousands of dollars)
Table 3-6: Median Household Income and Average Household Income of Pet Owners by Retail Purchasing Patterns for Pet Products, 2014 (in thousands of dollars)
Rise in Median Household Income
Table 3-7: Median Household Income by Selected Retail Channels for Pet Product Purchasing: Pet Owners, 2010–2014 (in thousands of dollars)
Channel Choice by Income Level
Table 3-8: Retail Channel Purchasing Patterns for Pet Products: By Household Income Bracket of Pet Owners, 2014 (percent)
Table 3-9: Retail Channel Purchasing Indexes for Pet Products: By Household Income Bracket of Dog or Cat Owners, 2014
Age Relationship to Channel Selection
Table 3-10: Median Age by Retail Purchasing Classification for Pet Products: Pet Owners, 2014
Shopper Psychographics: Other Pet Store Shoppers Stand Out
Pet Owners Skew High for Internet-Related Practices
Other Pet Store Shoppers Concerned About Environment
Table 3-11: Selected Shopping- and Buying-Related Psychographics, Any Agree: Pet Owners Overall vs. Dog Owners and Cat Owners, 2014 (overall percent and index by pet ownership)
Table 3-12: Selected Shopping- and Buying-Related Psychographics by Retail Channel Shopped for Pet Products, 2014 (overall percent and index by retail channel)
Table 3-13: Selected Technology-Related Psychographics: Pet Owners Overall vs. Dog Owners and Cat Owners, 2014 (overall percent and index by pet ownership)
Table 3-14: Selected Internet-Related Indexes by Retail Channel Shopped for Pet Products, 2014 (overall percent and index by retail channel)
Table 3-15: Selected Environmental-Related Indexes by Retail Channel Shopped for Pet Products, 2014 (overall percent and index by retail channel)
Channel Loyalty
Two-Thirds of Pet Product Shoppers Are Channel-Loyal
Figure 4-1: Pet Product Purchasers Who Buy Pet Products Through One Main Channel, 2014 (percent)
Figure 4-2: Channel Choice of Pet Product Purchasers Who Buy Pet Products Through One Main Channel, 2014 (percent)
Table 4-1: Channel-Loyal Purchasing of Pet Products by Retail Classification, Summer 2014 (number and percentages)
Table 4-2: Share of Total Channel-Loyal Purchasers of Pet Products by Leading Retail Channels or Pet Superstore Chains, 2010 - 2014 (percent)
Table 4-3: Percentage of Pet Product Shoppers Purchasing 100% of Pet Products Through Retail Channels Over Previous 12 Months, 2014 (percent)
Channel Loyalty Is Down Overall
Table 4-4: Overview of Channel Loyalty in Pet Product Purchasing: Total vs. Key Channel (Pet Store, Supermarket, or Discount Store), 2010 - 2014 (percent and number)
Figure 4-3: Key Channel (Pet Store, Supermarket, or Discount Store) Share of Total Channel-Loyal Pet Product Purchasers, 2010 – 2014 (percent)
Supermarkets, Other Pet Stores Decline Most in Channel Loyalty
Table 4-5a: Share of Customer Base Who Are Channel-Loyal by Leading Retail Channels or Pet Superstore Chains, 2010 – 2014 (percent)
Table 4-5b: Channel-Loyal Customer Base for Pet Products by Leading Retail Channel or Pet Superstore Chain, 2010 – 2014 (number in thousands)
Pet Owners Doing More Shopping Around
Figure 4-4: Percent of Pet Product Customer Base Who Also Shop in Other Channels: By Major Retail
Chapter 5: Mass-Market Focus

Mass Channels Draw Largest Percentage of Dog or Cat Owners as Pet Product Shoppers

Table 5-1: Purchasing Rates for Pet Products in Core Mass-Market Outlets: 2010 – 2014 (percent of pet owners)

Supermarkets

Figure 5-1: Channel-Loyal Purchasing of Pet Products by Selected Retail Classification, 2014 (percent)

Figure 5-2: Pet Product Types Purchased in Supermarkets in Last 3 Months, 2014: Pet Food, Pet Medications, Other Pet Supplies (percent)

Figure 5-3: Percentage of Pet Food Spending in Supermarkets in Last 12 Months, 2014 (percent)

Discount Stores, Mass Merchandisers and Supercenters

Figure 5-5: Share of Total Channel-Loyal Purchasers: Discount Stores vs. Pet Superstores, 2010 vs. 2014 (percent)

Figure 5-6: Pet Product Types Purchased in Walmart vs. Other Mass Merchandisers/Supercenters in Last 3 Months, 2014: Pet Food, Pet Medications, Other Pet Supplies (percent)

Figure 5-7: Percentage of Pet Product Spending in Walmart in Last 12 Months by Category, 2014 (percent)

Figure 5-8: Percentage of Pet Product Spending in Supercenters Other Than Walmart in Last 12 Months by Category, 2014 (percent)

Walmart Loves Pets

Illustration 5-3: Live Fish Sales at Walmart

Illustration 5-4: Pure Balance on Walmart.com

Illustration 5-5: Ol’ Roy Availability at Walmart

Target Also Building Its Pet Department

Illustration 5-6: Boots & Barkley Items at Target

Illustration 5-7: Target Ad Starring Brittney and Lizzie the Cats

Walmart and Target Consider Smaller Store Formats

Target and Walmart Jump into Pet Prescriptions Market

Wholesale Clubs

Figure 5-9: Pet Product Types Purchased in Wholesale Clubs in Last 3 Months, 2014: Pet Food, Pet Medications, Other Pet Supplies (percent)

Figure 5-10: Percentage of Pet Food Spending in Wholesale Clubs in Last 12 Months, 2014 (percent)

Illustration 5-8: Endcap of Pet Aisle at Sam's Club

Illustration 5-9: Sam's Club Exclusive Meow Mix Variety

Drugstores/Convenience Stores

Figure 5-11: Pet Product Types Purchased in Drugstores and Convenience Stores in Last 3 Months, 2014: Pet Food, Pet Medications, Other Pet Supplies

A Trip to Walgreens

Illustration 5-10: Walgreens PetShoppe Premium Treats

Illustration 5-11: Walgreens Pet Food Sales

Mass-Market Shopper Demographics

Table 5-2: Demographics for Pet Product Purchasers by Retail Channel: Supermarkets, Summer 2014 (number, percent, and index)

Table 5-3: Demographics for Channel-Loyal Pet Product Shoppers: Supermarkets, Summer 2014 (number,
percent, and index)
Table 5-4: Demographics for Pet Product Purchasers by Retail Channel: Discount Stores, Summer 2014 (number, percent, and index)
Table 5-5: Demographics for Channel-Loyal Pet Product Shoppers: Discount Stores, Summer 2014 (number, percent, and index)
Table 5-6: Demographics for Pet Product Purchasers by Retail Channel: Wholesale Clubs, Summer 2014 (number, percent, and index)
Table 5-7: Demographics for Pet Product Purchasers by Retail Channel: Drugstores/Convenience Stores, Summer 2014 (number, percent, and index)
Chapter 6: Pet Specialty Focus
A Growing Shopper Base
Table 6-1: Purchasing Rates for Pet Products in the Pet Specialty Channel: Overall, Pet Superstore, PetSmart, Petco, Other, 2010 vs. 2014 (percent of dog or cat owners)
Figure 6-1: Level of Pet Owner Agreement with Statement: "I usually shop for pet products in pet superstores or pet stores because of the customer service they provide," 2014 (percent)
Purchasing Rates by Product Type and Amount Spent
Figure 6-2: Pet Product Types Purchased in Pet Specialty Channel in Last 3 Months by Category, 2014: Pet Food, Pet Medications, Other Pet Supplies (percent)
Figure 6-3: Percentage of Pet Product Spending at PetSmart in Last 12 Months by Category, 2014 (percent)
Figure 6-4: Percentage of Pet Product Spending at Petco in Last 12 Months by Category, 2014 (percent)
Figure 6-5: Percentage of Pet Food Spending in Last 12 Months, Other Pet Store Chain vs. Independent Pet Stores, 2014 (percent)
Brand Preferences
PetSmart and Petco Continue to Advance in Pet Products and Services
Table 6-2: PetSmart and Petco Sales and Number of Stores: 2001-2013 (cumulative, in units and millions of dollars)
Natural Products a Retail Strategy in Pet Specialty
Figure 6-6: Level of Agreement with Statement: "Natural pet products sold in pet stores and superstores are superior to those sold in general stores such as supermarkets or supercenters," 2014 (percent)
Pet Specialty Chains Emphasize Non-Medical Services
Petco and PetSmart Pull China-Made Treats
Franchises and Small Businesses Spur Growth and Innovation
Focus on PetSmart
Table 6-3: PetSmart Sales and Number of Stores: 2001-2013 (in millions of dollars)
PetSmart Goes Private
PetSmart Acquires Pet360
Exclusive Products Key to Success
Illustration 6-1: PetSmart's National Geographic Sweepstakes
PetSmart Tests Small-Store Concept
Focus on Petco
Table 6-4: Petco Annual Sales and Number of Stores: 2001-2013 (in millions of dollars)
Petco Increases Pet Health Reach with Drs. Foster & Smith Purchase
Petco Unleashed
Other Pet Specialty Chains
Illustration 6-2: Pet Supplies Plus' Closed and Available Markets
Independent Pet Store Trends: An Uphill Battle
Pet Specialty Channel Shopper Demographics
Table 6-5: Demographics for Pet Product Purchasers by Retail Channel: Pet Superstores, Summer 2014 (number, percent, and index)
Table 6-6: Demographics for Channel-Loyal Pet Product Purchasers: Pet Superstores, Summer 2014 (number, percent, and index)
Table 6-7: Demographics for Pet Product Purchasers by Retail Channel: PetSmart, Summer 2014 (number, percent, and index)
Table 6-8: Demographics for Channel-Loyal Pet Product Purchasers: PetSmart, Summer 2014 (number, percent, and index)
Table 6-9: Demographics for Pet Product Purchasers by Retail Channel: Petco, Summer 2014 (number, percent, and index)
Table 6-10: Demographics for Channel-Loyal Pet Product Purchasers: Petco, Summer 2014 (number, percent, and index)
Table 6-11: Demographics for Pet Product Purchasers by Retail Channel: Pet Stores Other Than PetSmart or Petco, Summer 2014 (number, percent, and index)
Table 6-12: Demographics for Channel-Loyal Pet Product Purchasers: Pet Stores Other Than PetSmart or
“Digital Future” Is Here

Online Sales of Pet Products Picking Up Speed

Figure 7-1: Level of Agreement with the Statement: “I use the Internet to find information about pet care services,” 2014 (percent)

Figure 7-2: Level of Agreement with the Statement: “I use the Internet to find information about which pet foods to buy,” 2014 (percent)

Online Purchasing Rates

Figure 7-3: Online Purchasing Rates for Pet Products: Percent and Number of Pet Owners, 2010 - 2014 (in thousands)

Figure 7-4: Level of Agreement with Statement: “I am buying pet products online more than I used to,” 2012-2014 (percent)

Convenience, Low Prices Attract Pet Owners

Figure 7-5: Level of Agreement with the Statement: “I Like the Idea of Home Delivery for Pet Food,” 2014 (percent)

Figure 7-6: Primary Reasons for Purchasing Pet Products Online, 2014

Figure 7-7: Primary Reasons for Not Purchasing Pet Products Online, 2014 (percent)

When, What, Where

Figure 7-8: Time Frame for Most Recent Online Purchase of Pet Products, 2013 vs. 2014 (percent)

Figure 7-9: Pet Product Types Purchased Online in Last 3 Months, 2011 vs. 2014: Pet Food, Pet Medications, Other Pet Supplies (percent)

Figure 7-10: Percentage of Pet Product Spending Online in Last 12 Months: Pet Food and Pet Medications, 2014 (percent)

Table 7-1: Top Websites for Purchasing Pet Products Online, 2014 (percent)

Pet Food Delivery Skews to Urban Areas

Figure 7-11: Pet Food Delivery Based on Location, 2015 (percent)

Online Shopper Demographics

Table 7-2: Demographics for Pet Product Purchasers by Retail Channel: Online, Summer 2014 (number, percent, and index)

PetMed Express Under Pressure

Table 7-3: PetMed Express Sales, 2010-2014 (in millions of dollars)

Table 7-4: Share of PetMed Express Sales by Category: 2010, 2012, 2014 (percent)

Amazon: The Future of Pet Retail?

Illustration 7-1: Amazon Prime Pantry

Table 7-5: Response to the Question: “How long has it been since your changed pet food brands?”, 2015 (percent)

Figure 7-12: Pet Owners and Amazon.com Usage

AmazonFresh

Illustration 7-2: Amazon's Brick-and-Mortar Location at Purdue University

PetFlow Banks on Convenience

Illustration 7-3: PetFlow.com Home Page

Pet Specialty Strategizes with Online Sales

Mass Merchandisers, Supermarkets Turn To Online Sales

Going Mobile

Chapter 8: Veterinary Channel Focus

Opportunities and Challenges

Table 8-1: Common Reasons Why Pet Owners Don't Use Professional Veterinary Care (percent who completely agree or somewhat agree)

Table 8-2: Percentage of Dog and Cat Owners Who Have Visited Vet in Past Year: Routine Checkup vs. Sick/Emergency Care, 2011 vs. 2014

Veterinary Channel Purchasing Rates

Table 8-3: Veterinary Channel Pet Product Purchasing Pattern by Household Income Bracket, 2014 (percent and index)

Purchasing Rates by Product Type and Amount Spent

Figure 8-1: Pet Product Types Purchased in Veterinary Channel in Last 3 Months, 2011 vs. 2014: Pet Food, Pet Medications, Other Supplies (percent)

Figure 8-2: Percentage of Pet Product Spending in Veterinary Channel in Last 12 Months, 2014: Pet Food and Pet Medications (percent)

Veterinary Channel Shopper Demographics

Table 8-4: Demographics for Pet Product Purchasers by Retail Channel: Veterinarians, Summer 2014 (number, percent, and index)
Chapter 9: Natural Supermarket Focus
Sales Trends by Category
Table 9-1: Retail Dollar Sales of Pet Products in the Natural Supermarket Channel by Category and Segment, 2013 vs. 2014 (in millions of dollars)
Table 9-2: Share of Retail Dollar Sales of Pet Products in the Natural Supermarket Channel by Category and Segment, 2013 vs. 2014 (percent)
Specialty/Gourmet Supermarket Sales Down Nearly $2 Million
Table 9-3: Retail Dollar Sales of Pet Products in the Specialty/Gourmet Supermarket Channel by Category and Segment, 2013 vs. 2014 (in millions of dollars)
Table 9-4: Share of Retail Dollar Sales of Pet Products in the Specialty/Gourmet Supermarket Channel by Category and Segment, 2013 vs. 2014 (percent)
Food Safety Still a Factor for Pet Owners
Figure 9-1: Level of Agreement with Statement: "I consider natural and organic pet foods to be safer than regular pet foods," 2014, Pet Owners Overall vs. Natural Pet Product Purchasers (percent)
Figure 9-2: Level Of Agreement With Statement: "I am concerned about the safety of the dog food, dog treat, and dog chew products (or cat food and treat products) that I buy," 2012 vs. 2014 (percent)
Figure 9-3: Level Of Agreement With Statement: "Fear of pet food contamination/ product safety is a key consideration in the dog foods/cat foods I buy," 2014 (percent of cat and dog product purchasers)
Whole Foods and Trader Joe's Shopper Base Plateaus
Table 9-5: Pet Owner Shopping Patterns: Trader Joe's vs. Whole Foods, 2010 – 2014 (percent, number, and index for U.S. pet-owning households)
Table 9-6: Pet Owners Shopping at Trader Joe's or Whole Foods, 2010–2014 (percent and number of U.S. pet-owning households)
Whole Foods Introduces Two New Pet Food Lines
Illustration 9-1: Whole Foods' Whole Paws Pet Food
Illustration 9-2: Whole Foods' Tender & True Organic Pet Food
Shopper Demographics: Whole Foods and Trader Joe's
Table 9-7: Demographics for Pet Owners Who Shop at Whole Foods or Trader Joe's, 2014 (number, percent, and index)
Natural Supermarket Pet Department Dynamics
Illustration 9-3: Whole Foods Dog Food/Treat Selection
Natural/Organic Products = Quality
Figure 9-4: Level of Agreement with Statement: "Natural/organic brand pet products are often better than standard national brand products," 2011 vs. 2014 (percent)
Table 9-8: Whole Foods Financial Highlights, 2009-2013
Chapter 10: Dollar Store Focus
Industry Overview
Dollar Tree/Family Dollar Acquisition
Potential Impact on Walmart
Potential Impact on Dollar General
The Big (Four) Dollar Store Chains
Dollar General
Family Dollar
Dollar Tree
99¢ Only Stores
Table 10-1: Top Four Dollar Store Chains: Sales, No. of Stores, Store Size, Target Market
Pet Department Trends
Figure 10-1: Pet Product Types Purchased in Dollar Store Channel in Last 3 Months, 2014: Pet Food, Pet Medications, Other Pet Supplies (percent)
Figure 10-2: Percentage of Pet Food Spending in Dollar Stores in Last 12 Months, 2014 (percent)
Illustration 10-1: Family Pet Page from Family Dollar Website
A Trip to Dollar Tree
Illustration 10-2: Dollar Tree Toy and Treat Selection
Illustration 10-3: Dollar Tree Food and Treat Selection
Chapter 11: Other Channels
Many Alternative Channel Options
Agricultural Stores
Figure 11-1: Pet Product Types Purchased in Agricultural/Feed-Seed/Farm Stores in Last 3 Months, 2014: Pet Food, Pet Medications, Other Pet Supplies
Tractor Supply Co. Growing its Pet Department...
Illustration 11-1: Tractor Supply Weekly Circular
...TSC Also Testing New Pet-Focused Concept Stores
A Visit to Tractor Supply Co.
Illustration 11-2: 4health Aisle at Tractor Supply Co.
Illustration 11-3: Dog Training Products at Tractor Supply Co.
Illustration 11-4: Supplements and Health Care Selection at Tractor Supply
Home Improvement Channel
Illustration 11-5: Lowe's Website Pet Project How-To List
Closeout Stores: T.J. Maxx and Marshall's
T.J. Maxx
Illustration 11-6: T. J. Maxx Toy Selection
Marshall's
Illustration 11-7: Marshall's Pet Aisle Endcap
Illustration 11-8: Marshall's Pet Treat Selection
Luxury Retailers
Food Co-ops
Farms and Farm Markets
Gourmet Food Shops and Country Markets

Ordering:
Order Online - http://www.researchandmarkets.com/reports/3163615/
Order by Fax - using the form below
Order by Post - print the order form below and send to
Research and Markets,
Guinness Centre,
Taylors Lane,
Dublin 8,
Ireland.
Fax Order Form
To place an order via fax simply print this form, fill in the information below and fax the completed form to 646-607-1907 (from USA) or +353-1-481-1716 (from Rest of World). If you have any questions please visit http://www.researchandmarkets.com/contact/

Order Information
Please verify that the product information is correct and select the format(s) you require.

Product Name: Pet Product Retailing in the U.S.: Channel Competition and Consumer Shopping Trends, 2nd Edition
Web Address: http://www.researchandmarkets.com/reports/3163615/
Office Code: SCDKVZBI

Product Formats
Please select the product formats and quantity you require:

<table>
<thead>
<tr>
<th>Product Format</th>
<th>Quantity</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Electronic (PDF) - Single User</td>
<td></td>
<td>USD 3995</td>
</tr>
<tr>
<td>Electronic (PDF) - Enterprisewide</td>
<td></td>
<td>USD 7990</td>
</tr>
</tbody>
</table>

Contact Information
Please enter all the information below in BLOCK CAPITALS

Title: [ ] Mr  [ ] Mrs  [ ] Dr  [ ] Miss  [ ] Ms  [ ] Prof

First Name: ___________________________  Last Name: ___________________________

Email Address: * ___________________________

Job Title: ___________________________

Organisation: ___________________________

Address: ___________________________

City: ___________________________

Postal / Zip Code: ___________________________

Country: ___________________________

Phone Number: ___________________________

Fax Number: ___________________________

* Please refrain from using free email accounts when ordering (e.g. Yahoo, Hotmail, AOL)
**Payment Information**

Please indicate the payment method you would like to use by selecting the appropriate box.

- **Pay by credit card:** You will receive an email with a link to a secure webpage to enter your credit card details.

- **Pay by check:** Please post the check, accompanied by this form, to:
  Research and Markets,
  Guinness Center,
  Taylors Lane,
  Dublin 8,
  Ireland.

- **Pay by wire transfer:** Please transfer funds to:
  
  | Account number | 833 130 83  |
  | Sort code      | 98-53-30   |
  | Swift code     | ULSBIE2D   |
  | IBAN number    | IE78ULSB98533083313083 |
  | Bank Address   | Ulster Bank, 27-35 Main Street, Blackrock, Co. Dublin, Ireland. |

If you have a Marketing Code please enter it below:

**Marketing Code:**

Please note that by ordering from Research and Markets you are agreeing to our Terms and Conditions at http://www.researchandmarkets.com/info/terms.asp

**Please fax this form to:**

(646) 607-1907 or (646) 964-6609 - From USA

+353-1-481-1716 or +353-1-653-1571 - From Rest of World