Senior, Weight Management and Special Needs Pet Products in the U.S., 2nd Edition

Description:
Senior, Weight Management and Special Needs Pet Products in the U.S., 2nd Edition examines the market for products designed and marketed specifically for senior or overweight pets, which often overlap with products for special needs pets, including convalescing pets and those with limited mobility. Coverage extends to products positioned on senior health and weight management in general, such as “healthy maturity” and “healthy weight” formulas, as well as products addressing specific medical conditions stemming from advancing age or overweight, as long as the product also has a prominent senior or weight management positioning. For purposes of brevity, senior and weight management products are at times referred to in this report as SWM products.

Three Product Classifications
Reflecting the top areas of marketer and consumer interest, the report segments SWM products into three classifications:
- Pet food and treats, including nutraceutical treats.
- Supplies and devices: assistive devices and other non-food assistance products, including mobility devices (harnesses, wheelchairs, footwear, etc.), hygienic products, bedding, toys, clean-up products and watering and feeding devices.
- Pet supplements.

Report Methodology
The information contained in this report was obtained from primary and secondary research. Primary research includes national online consumer polls of U.S. adult pet owners (age 18+) conducted on an ongoing basis, to measure purchasing patterns and attitudes with regard to pet products and services. With a sample size of approximately 2,000, these surveys are based on national online research panels that are census representative on the primary demographic measures of age, gender, geographic region, race/ethnicity, and household income. The majority of the information is drawn from the survey conducted in November/December 2015, which includes responses from 930 dog owners and 678 cat owners.

Our primary research also includes interviews with pet market experts; participation in and attendance at pet industry events including the American Pet Products Association's Global Pet Expos (2004-2015) and Petfood Industry/Watt Publishing's Petfood Forums (2004-2015); on-site examination of retail and service provider venues; and Internet canvassing including blogs. Secondary research includes information- and data-gathering from consumer business and trade publications including Pet Age, Pet Business, Pet Product News International, Petfood Industry, and Veterinary Practice News; company profiles in trade and consumer publications; and information culled from Packaged Facts’ extensive pet market research database and report collection.

Our estimates of market size and company performance are based on reported revenues of pet product manufacturers, retailers, and pet services providers; sales data from IRI for multi-outlet (MULO), which represents sales through U.S. supermarkets, drugstores, mass merchandisers (Walmart, Target, Kmart, and Shopko), Sam's Club and BJ's warehouse clubs, dollar stores excluding Dollar Tree, and military commissaries; surveys of independent and chain pet store retailers; government data including U.S. Bureau of Labor Statistics Consumer Expenditure Surveys; and figures from pet industry publications and other market research sources. The following market size estimates assume that SWM dog and cat food accounts for approximately 10% of all dog and cat food sales in the United States; that approximately one-third of dog and cat supplements are directly senior-health or weight-management targeted; and that approximately 3% of other non-food dog/cat supplies meet our senior, weight management or special needs pet product criteria.

Our analysis of pet ownership trends primarily relies on cross-tabulations of Summer 2015 Simmons data compiled by Experian Marketing Services. On an ongoing basis, Experian Marketing Services conducts booklet-based surveys of a large and random sample of consumers (approximately 25,000 for each 12-month survey compilation) who in aggregate represent a statistically accurate cross-section of the U.S. population.

Contents:
Senior, Weight Management and Special Needs Pet Products in the U.S.
medications I buy,” 2015 (percent)
Figure 2-6 Level of Agreement with the Statement: “Weight/obesity-related conditions are the cause of some of the pet medications I buy,” 2015 (percent)
Senior Pet Ownership on the Rise
Table 2-4 Pet Ownership Projections: Percent and Number of Pet Owners with a Senior Pet, 2015 vs. 2020 (in thousands and percent)
Pet Owners Interested in Senior Pet Care Services
Figure 2-7 Level of Interest in Senior Pet-Related Services, 2015 (percent)
Figure 2-8 Percentage of Pets Who Use Assistive/Mobility Devices, Overall and by Age of Pet, 2015 (percent of dog and cat owners)
Millennials, Boomers Driving Pet Ownership Trends
Figure 2-9 Pet Ownership Levels by Age of Dogs and Cats, 2012 vs. 2016 (percent of dog- and cat-owning households)
Millennials Top Baby Boomers as Largest Pet-owning Cohort
Older Owners = Older Pets
Figure 2-10 Pet Ownership by Generational Age Bracket and Age of Dog, 2015 (percent of dog-owning households)
Figure 2-11 Pet Ownership by Generational Age Bracket and Age of Cat, 2015 (percent of cat-owning households)
Aging Boomers Look to Ease Burdens of Pet Ownership
Pet Overweight, Obesity Crisis Continues Unabated
Figure 2-12 Percentage of Overweight and Obese Dogs and Cats, 2009 vs. 2014
The APOP at the Forefront of Prevention, Education
Obese Pets Are Unhealthy Pets
Diabetes on the Rise
Older Pets More Likely To Be Considered Overweight
Figure 2-13 Percentage of Obese/Overweight Dogs vs. Dogs on a Special Diet: 2010, 2012 and 2014 (percent)
Figure 2-14 Percentage of Obese/Overweight Dogs vs. Dogs on a Special Diet: By Size of Dog, 2014 (percent)
Figure 2-15 Percentage of Obese/Overweight Cats vs. Cats on a Special Diet: 2010, 2012 and 2014 (percent)
Figure 2-16 Percentage of Obese/Overweight Cats vs. Cats on a Special Diet: By Owner Generation, 2014 (percent)
Figure 2-17 Percentage of Owners Who Consider Their Pet Overweight: Overall and by Age of Pet, 2015 (percent of dog and cat owners)
Figure 2-18 Percentage of Dog Owners Who Consider Their Pet Overweight: Overall and by Size of Dog, 2015 (percent of dog owners)
New Labeling Requirements May Promote Obesity Awareness
Other Labeling Changes Could Help Owners Make Smart Food Choices
Building a Better Pet Weight Management Food
Competition From Other Pet Foods
Promoting Pet Exercise for Weight Maintenance
Illustration 2-1 One Fast Cat Exercise Wheel
Illustration 2-2 Water Treadmill for Cats
Illustration 2-3 Cat Swimming for Exercise
An Obesity Vaccine on the Horizon?
Weight Management Goes High Tech
Interest in Functional Pet Foods/Treats a Boon for SWM Market
Table 2-5 Use of Specially Formulated Dog Food: 2010, 2012, and 2014 (percent)
Table 2-6 Use of Specially Formulated Cat Food: 2010, 2012, and 2014 (percent)
Table 2-7 Use of Specially Formulated Dog Treats: 2010, 2012, and 2014 (percent)
Figure 2-19 SWM-Related Dog and Cat Food Usage by Type, 2015 (percent)
Figure 2-20 SWM-Related Dog and Cat Treat Usage by Type, 2015 (percent)
Pet Supplements Outpace Overall Market
Table 2-8 U.S. Retail Sales of Pet Supplements, 2010-2019 (in millions of dollars)
Figure 2-21 SWM-Related Pet Supplement Usage by Type, 2015 (percent of pet supplement purchasers)
Increased Veterinary Focus on Senior, Special Needs Pets
Senior, Healthy Weight Also a Focus for Other Service Providers
Alternative/Holistic Approaches to Senior Care
International Association of Animal Hospice and Palliative Care
Chapter 3: Marketing and New Product Trends
Key Points
Introduction

Education Key to Success of SWM Products

Pet Food at the Core

Competitive Structure

Pet Foods and Treats

Most Senior, Weight Management Foods Part of Broader Brand Lines

Competition Divided Between Mass-Market, Specialty, and Vet/Professional

Nestlé Purina's Mass-Market Lead Carries Over into SWM

Table 3-1 Marketer Shares of IRI-Tracked Dollar Sales of Weight Management and Senior Dog and Cat Food by Type, 2014-2015 (millions of dollars and percent)

Pet Specialty Channel Offers Large Selection of SWM Fare

Illustration 3-1 PetSmart.com Top Three Best-Selling Weight Management (Top) and Senior (Bottom) Dog Foods, February 2016

Illustration 3-2 PetSmart.com Top Three Best-Selling Weight Management (Top) and Senior (Bottom) Cat Foods, February 2016

Veterinary Products Part of Condition-Specific Lines

Mars Veterinary Makes Genetic Health Analysis Accessible

New Product Trends in Weight Management Foods

Euphemistic Names Increase Consumer Appeal, Skirt Regulations

Purina Just Right Capitalizes on Holistic Pet Health Trend

Illustration 3-3 Purina Just Right Infographic

Grain-Free, Raw Diets for Weight Loss

Illustration 3-4 Wellness CORE Reduced Fat and Simple LID Healthy Weight

New Hill's Prescription Diet Products Target Multiple Conditions

Illustration 3-5 Hill's Prescription Diet Metabolic Multi-Condition Formulas

Low-Glycemic, High Protein Formulas

Illustration 3-6 Spring Naturals Grain Free Turkey & Salmon Dry Dinner

New Product Trends in Senior Foods

Botanicals, Omega-3s Power Cognitive Function Foods

Illustration 3-7 Nestlé Purina Pro Plan Bright Mind Senior Dog Food

SWM Treats

Weight Management Treats Go Small, Encourage Activity

Illustration 3-8 Zuke's Skinny Bakes 2- and 5-Calorie Treats

Illustration 3-9 The Honest Kitchen Quickies Treats

Illustration 3-10 Crazy Dog Walkies! Fit Bites

Functional Treats Provide Multiple Senior Benefits

Illustration 3-11 Greenies Veterinary Line

Illustration 3-12 Pet Age October 2015 Outsert Featuring Gray Muzzle Brushless ToothPaste

Illustration 3-13 Ark Naturals Gray Muzzle Senior Department Contest Promotion

Illustration 3-14 WholeLife TruHips

Illustration 3-15 Smart Fido Treats

Supplies, Devices and Other Assistance Products

SWM Products Concentrated in Five Segments

Marketers Range from Overall Leaders to Tightly Focused Specialists

The Appeal of Online SWM Pet Supplies Retailers

Illustration 3-16 SeniorPetProducts.Com Splash Page

Mobility Devices

Harnesses, Leashes, and Wheeled Devices

Illustration 3-17 Help'Em Up U-Band Hip Lift by Blue Dog Designs

Illustration 3-18 Gingerlead Dog Support and Rehabilitation Harness
Illustration 3-19 Kurgo’s Up and About Dog Lifter
Illustration 3-20 Walkin’ Wheels Configurable Dog Wheelchairs
Stairs and Ramps
Illustration 3-21 Solvit Products Tri-SCOPE Ramp
Illustration 3-22 Gen7Pets Indoor Carpet Mini Ramp
Illustration 3-23 Primetime Petz Drawer Step
Illustration 3-24 The Paws Aboard Boat Ladder for Dogs by Skamper-Ramp
Boots, Socks, and Stickers
Illustration 3-25 Power Paws by Woodrow Wear
Pet Strollers
Hygienic Products
Pet Diapers
Illustration 3-26 Emily Rose Happy Pet Diaper Holder
Illustration 3-27 Wiki Wags Disposable Wraps
Grooming Products
Illustration 3-28 Ark Naturals Gray Muzzle No Shampoo! Shampoo!
Clean-up Products
Specially and Orthopedic Beds
Illustration 3-29 Sealy Large Cooling Memory Foam Mattress
Illustration 3-30 Krysak Industries H4Legs H-Bed
Illustration 3-31 PetTherapeutics MagnaPETic Relief Pad
Toys
Illustration 3-32 Left: Kong Senior, Made of Specially Senior-Formulated Plastic To Be Easy on Aging Teeth; Right: Orbee-Tuff Old Soul Dog Bones
Illustration 3-33 Petmate Chuckit! Indoor Fumbler
Watering and Feeding Devices
Weight Management Feeding Supplies and Devices
Illustration 3-34 EZ-Weigh PetProPlus by ProActive PetHealth
Illustration 3-35 SureFeed Microchip Feeder by SureFlap
Illustration 3-36 Buster SoftCube by Kruuse
Birds, Rodents, and Other Animals
Illustration 3-37 SnuggleSafe Microwave Heat Pad
Pet Supplements
Competitive Structure
Nutramax Corners Mass-Market Sales Through Walmart Expansion
Senior-Focused Supplements
Senior-Specific Supplements
Illustration 3-38 Designing Health’s The Missing Link Ultimate Canine Senior Health Formula
Illustration 3-39 Vibrant Pets Senior Complete Supplement
Illustration 3-40 AdaptoGeneration’s Revitamal Anti-Aging Formula
Illustration 3-41 RejuvaPet’s RestoraPet Anti-Aging Supplement
Mobility Supplements
Illustration 3-42 RxMobility Canine Joint Formula
Illustration 3-43 Wholistic Pet Organics’ Canine Complete Joint Mobility
Illustration 3-44 ArthroMax K9 Mobility
Illustration 3-45 Tea for Spot Leaps and Bounds
Illustration 3-46 Herbsmith’s SoundDog Viscosity
Illustration 3-47 Madra Mor Mobility Mud
Cognitive Supplements
Illustration 3-48 Quincy Animal Health’s Neutricks Supplement for Cats
Illustration 3-49 Ark Naturals Gray Muzzle Brain’s Best Friend Supplement
Heart, Eye and Bladder Health Supplements
Digestive Health, Immune Support and Probiotics
Illustration 3-50 I and love and you My Tummy Hurts
Pet Obesity/Weight Management
Illustration 3-51 PureLife 4 Dogs Weight Management Supplement
Illustration 3-52 K-10+ Weight Control Supplement
Illustration 3-53 Fruitables Weight Loss Supplement
Birds, Rodents, and Other Animals
Illustration 3-54 Nekton Bird Vitamin and Supplement Kit
Illustration 3-55 Oxbow Animal Health Senior Support Supplement
Chapter 4: The Consumer
Key Points
A Note About Data Sources
25% of Dog/Cat Households Use Weight Management or Senior Formulas
Table 4-1a Household Purchasing Rates for Weight Management or Senior Pet Food: Dry and Canned Dog and Cat Food, 2011-2015 (percent of U.S. households with dogs or cats)
Table 4-1b Number of Households Purchasing Weight Management or Senior Pet Food: Dry and Canned Dog and Cat Food, 2011-2015 (in millions of U.S. households with dogs or cats)
Boomers Account for 43% of SWM Pet Food Purchasers
Figure 4-1 Share of Pet Owners Purchasing Senior or Weight Management Pet Food by Generation, 2015 (percent)
Purchasing Rates Up Slightly for All Types Except Dry WM
Figure 4-2 Household Purchasing Rates for Dry and Canned Weight Management and Senior Dog and Cat Food: 2011 vs. 2015 (percent of U.S. households with dogs or cats)
11% of Dog Households Use Senior Dry Dog Food
Table 4-2 Purchasing Rates for Weight Management or Senior Pet Food: Dog Owners, 2011 vs. 2015 (percent of U.S. households with dogs)
WM Formula Dog Foods Attract Senior Crowd
Table 4-3 Key Demographic Indicators for Purchasing Weight Management Dry Dog Food, 2015 (percent, index and number of dog-owning households)
Table 4-4 Key Demographic Indicators for Purchasing Weight Management Canned Dog Food, 2015 (percent, index and number of dog-owning households)
Senior Dry and Wet/Canned Dog Food Skews Older, Retired
Table 4-5 Key Demographic Indicators for Purchasing Senior Dry Dog Food, 2015 (percent, index and number of dog-owning households)
Table 4-6 Key Demographic Indicators for Purchasing Senior Wet/Canned Dog Food, 2015 (percent, index and number of dog-owning households)
15% of Cat-Owning Households Use WM Cat Foods
Table 4-7 Purchasing Rates for Weight Management or Senior Pet Food: Cat Owners, 2011 vs. 2015 (percent of U.S. households with cats)
Demographics for WM Dry vs. Wet/Canned Cat Food
Table 4-8 Key Demographic Indicators for Purchasing Weight Management Dry Cat Food, 2015 (percent, index and number of cat-owning households)
Table 4-9 Key Demographic Indicators for Purchasing Weight Management Wet/Canned Cat Food, 2015 (percent, index and number of cat-owning households)
Older, Retired Base for Senior Cat Formulas
Table 4-10 Key Demographic Indicators for Purchasing Senior Dry Cat Food, 2015 (percent, index and number of cat-owning households)
Table 4-11 Key Demographic Indicators for Purchasing Senior Wet/Canned Cat Food, 2015 (percent, index and number of cat-owning households)
Patterns for Pet Supplements and SWM Food/Treats
Figure 4-3 Percent of Dog- and Cat- Owning Households Who Buy Pet Vitamins/ Supplements and/or SWM Pet Food: Overall vs. Cross Purchasing, 2015 (percent)
Table 4-12 Percentage of Dog and Cat Owners Purchasing Treats for Weight Control: By Size of Dog, 2008 vs. 2014 (percent)
SWM Products a Prime Draw for “Pet Pamperers”
Table 4-13 Selected Pet Psychographics: Dog Owners Overall vs. Dog Owners Who Purchase Senior or Weight Management Pet Food, 2015 (percent and index)
Table 4-14 Selected Pet Psychographics: Cat Owners Overall vs. Cat Owners Who Purchase Senior or Weight Management Pet Food, 2015 (percent and index)
SWM Crowd More Likely to Buy Natural, Organic
Table 4-15 Use of Specialty Pet Food: Dog Owners Overall vs. Dog Owners Who Purchase Senior or Weight Management Pet Food, 2015 (percent and index)
Table 4-16 Use of Specialty Pet Food: Cat Owners Overall vs. Cat Owners Who Purchase Senior or Weight
Management Pet Food, 2015 (percent and index)
SWM Cat Food Purchasers Likely to Spend More
Table 4-17 Relative Price of Pet Food Typically Purchased: Dog Owners Overall vs. Dog Owners Who Purchase Senior or Weight Management Pet Food, 2015 (percent and index)
Table 4-18 Relative Price of Pet Food Typically Purchased: Cat Owners Overall vs. Cat Owners Who Purchase Senior or Weight Management Pet Food, 2015 (percent and index)
SWM Food Purchasers Over-index for Natural Food Store, Vet Channels
Table 4-19 Pet Product Shopping Patterns by Retail Channel: Dog Owners Overall vs. Dog Owners Who Purchase Senior or Weight Management Pet Food, 2015 (percent and index)
Table 4-20 Pet Product Shopping Patterns by Retail Channel: Cat Owners Overall vs. Cat Owners Who Purchase Senior or Weight Management Pet Food, 2015 (percent and index)
SWM Cat Owners More Likely to Use Vet Services
Figure 4-4 Agreement with the Statement, “I buy pet food/nutrition products related to aging issues for my pet”: Dog or Cat Owners Overall vs. Dog or Cat Owners Who Have Taken Their Pet to the Veterinarian in the Last 12 Months, 2015 (percent and index)
Figure 4-5 Agreement with the Statement, “I buy pet food/nutrition products related to weight/obesity for my pet”: Dog or Cat Owners Overall vs. Dog or Cat Owners Who Have Taken Their Pet to the Veterinarian in the Last 12 Months, 2015 (percent and index)

Ordering:
Order Online - http://www.researchandmarkets.com/reports/3634204/
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: Senior, Weight Management and Special Needs Pet Products in the U.S., 2nd Edition
Web Address: http://www.researchandmarkets.com/reports/3634204/
Office Code: SC

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

<table>
<thead>
<tr>
<th>Quantity</th>
<th></th>
<th>USD 3500</th>
<th>USD 7000</th>
</tr>
</thead>
<tbody>
<tr>
<td>Electronic (PDF) - Single User:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Electronic (PDF) - Enterprisewide:</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

* The price quoted above is only valid for 30 days. Please submit your order within that time frame to avail of this price as all prices are subject to change.

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