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.

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