Pet Food in the U.S., 12th Edition

Description:
Drawing on more than 20 years of experience in analyzing the pet food industry as well as Packaged Facts' broad cross-category expertise, Pet Food in the U.S., 12th Edition pinpoints strategic directions for current and prospective marketers, with a forward-looking focus on high-growth product segments and market drivers. Covering products for all type of companion animals, the report devotes separate chapters to Dog Food, Cat Food, and Other Pet Food (birds, small animal, fish, and reptiles), while also providing a comprehensive Market Overview covering cross-market trends and opportunities. Among these: recent and expected mergers and acquisitions; private-label pet food; advertising and promotional initiatives; the impact of natural products on the industry; specialty diet products; and much more.

The report provides market size estimates for the overall retail universe and projections through 2018, while quantifying mass-market sales to the marketer/brand share level using data from IRI and the specialty channel through GfK. It also charts market size and marketer share figures for the natural and specialty/gourmet supermarket channels, using SPINSscan sales tracking data. In sum, Pet Food in the U.S., 12th Edition thoroughly documents competitive, new product and retail trends, as well as trends in pet food purchaser demographics, brand preferences, cross-channel shopping, and cross-product purchasing. Consumer profiling is based on exclusive data from the quarterly pet owners surveys and customized cross tabulations of Simmons consumer survey data from Experian Marketing Services.

Contents:
- Chapter 1 Executive Summary
- Scope and Methodology
- Three Animal Categories: Dog, Cat, Other
- Terminology
- Exclusions
- Report Methodology
- Market Size and Growth
  - Pet Food Hits $30 Billion Mark
  - Table 1-1 U.S. Retail Sales of Pet Food, 2011-2015 (in billions of dollars)
  - Slight Sales Gains in Mass
  - Table 1-2 IRI-Tracked Sales of Pet Food: Total and by Category and Segment, 2015 (in millions of dollars, units and pounds)
  - Pet Food Keeps Rolling in Pet Specialty Channels
  - Table 1-3 Retail Dollar Sales of Pet Food in Pet Specialty, Veterinary and Farm/Feed Channels, 2015 (in billions of dollars)
  - Pet Food Sales Trends in Natural and Specialty/Gourmet Supermarkets
  - Table 1-4 Retail Dollar Sales of Pet Food and Pet Care in the Natural Supermarket and Specialty/Gourmet Channels, 2014 vs. 2015 (in millions of dollars)
  - Share of Pet Food Sales by Channel
  - Table 1-5 Share of U.S. Sales of Pet Food Market by Retail Channel Classification, 2015 (percent)
  - Sales Growth Through 2020
  - Table 1-6 Projected U.S. Retail Sales of Pet Food, 2015-2020 (in billions of dollars)
- Market Outlook
  - Consumers Somewhat More Optimistic About Economy
  - But Reduced Spending Remains the Norm for Many
  - Table 1-7 Level of Agreement with Statement: “I am spending less on pet products because of the economy,” 2011-2016 (percent)
  - Pet Owners' Monthly Spend
  - Table 1-8 Amount Spent on Pet Products in Last 30 Days, February 2016 (percent)
- Human/Animal Bond a Key Pet Food Catalyst
- The Humanization of Pet Food
Older Pets
Failing to Recognize a Weight Problem
Table 1-9 Agreement with Statement: “I have an overweight dog/cat,” 2015 vs. 2016 (percent)

Product Safety Drives Purchase Decisions
Competitive Trends
Just Three Players Have Double Digit Shares in Dog/Cat
Table 1-10 Top U.S. Marketers of Dog/Cat Food by Share of Retail Sales, 2015 (percent)

M&A and Investment Activity
Big Three Capture Majority of Mass-Market Pet Food Sales
Retail Trends
PetSmart and Petco’s Sales Approach $12 Billion
Private Label Drops Again

Online Sales
Table 1-11 Time Frame for Most Recent Online Purchase of Pet Products, 2012-2016 (percent of pet owners)

Pet Consumer Trends
Pet Ownership and Population Trends
Table 1-12 Household Penetration Rates for Selected Pet-Owning Classifications, 2011-2015 (percent of and number of U.S. households in millions)

Product and Marketing Trends
Natural Products Dominate the Trends
Grain-Free and Other “Free-Of” Claims
Proteins
Preventive Health Benefits of Pet Food Emphasized
Table 1-13 Level of Agreement with Statement: “High-quality dog foods/catfoods are effective for preventive health care,” 2014 and 2015 (percent)

Marketers Compete Through Product Claims
Table 1-14 Dog and Cat Owners Currently Using Pet Food: By Claim, 2015 (percent)
Grain-Free and Other “Free-Of” Claims
Proteins
Table 1-14 Agreement with Statement: “My dog/cat needs a high-quality protein diet,” 2016 (percent)

Table 1-15 Types of Pet Food Purchased: By Protein Content, 2015 (percent)
Exotic Proteins
Other Ingredients
Table 1-17 Agreement with Statement: “Vegetables are good for my dog/cat,” 2016 (percent)

What’s New in Ancestral Limited Ingredient Diets
Diets for Every Pet Type
Home-Delivered Pet Food
Home-Cooked Pet Food
Food Toppers
Making the (Human) Grade

In the Raw
Treat Trends
Trends in Non-Dog/Cat Pet Food
Dog Food Market Size and Growth
Historical and Projected Dog Food Retail Sales
Table 1-18 U.S. Retail Sales of Dog Food, 2011-2020 (in millions of dollars)
Cat Food Market Size and Growth
Historical and Projected Cat Food Retail Sales
Table 1-19 U.S. Retail Sales of Cat Food: 2011-2020 (in millions of dollars)
Other Pet Food Market Size and Growth
Historical and Projected Other Pet Food Sales
Table 1-20 U.S. Retail Sales of Other Pet Food: 2011-2020 (in millions of dollars)

Chapter 2: Market Overview
Introduction
Three Animal Categories: Dog, Cat, Other
Terminology
Exclusions
Other Marketing Classifications
Market Size and Growth

Pet Food Hits $30 Billion Mark

Table 2-1 U.S. Retail Sales of Pet Food, 2011-2015 (in billions of dollars)

Slight Sales Gains in Mass

Table 2-2 IRI-Tracke8d Sales of Pet Food: Total and by Category and Segment, 2015 (in millions of dollars, units and pounds)

Pet Food Keeps Rolling in Pet Specialty Channels

Table 2-3 Retail Dollar Sales of Pet Food in Pet Specialty, Veterinary and Farm/Feed Channels, 2015 (in billions of dollars)

Pet Food Sales Trends in Natural and Specialty/Gourmet Supermarkets

Table 2-4 Retail Dollar Sales of Pet Food and Pet Care in the Natural Supermarket and Specialty/Gourmet Channels, 2014 vs. 2015 (in millions of dollars)

Dog Food Rules Pet Food Sales

Table 2-5 Share of IRI-Tracked Retail Dollar Sales of Pet Food by Category, December 2014 vs. December 2015 (percent)

Dry Pet Food Still on Top, But Losing Share

Table 2-6 Share of IRI-Tracked Sales of Dog and Cat Food by Form, December 2014 vs. December 2015 (percent)

Pet Food Sales by Form: Dry Dog Food at Over One-Third of Market

Table 2-7 Share of IRI-Tracked Sales of Pet Food by Form, December 2014 vs. December 2015 (percent)

Share of Pet Food Sales by Channel

Table 2-8 Share of U.S. Retail Sales of Pet Food Market by Channel Classification, 2015 (percent)

Market Outlook

Consumers Somewhat More Optimistic About Economy

Table 2-9 Pet Owners: Overview by Change in Financial Situation Compared With 12 Months Ago, 2012-2015 (U.S. pet-owning households)

Table 2-10 Pet Owners: Overview by Expectations for Personal Financial Situation Over the Next 12 Months, 2012-2015 (U.S. pet-owning households)

But Reduced Spending Remains the Norm for Many

Table 2-11 Level of Agreement with Statement: “I am spending less on pet products because of the economy,” 2011-2016 (percent)

Pet Owners’ Monthly Spend

Table 2-12 Amount Spent on Pet Products in Last 30 Days, February 2016 (percent)

Table 2-13 Pet Food Purchasing by Price Level, 2014-2016 (percent)

Human/Animal Bond a Key Pet Food Catalyst

Table 2-14 Level of Agreement with Statement: “My dog or cat has a positive impact on my mental health,” 2016 (percent)

Table 2-15 Level of Agreement with Statement: “My dog or cat has a positive impact on my physical health,” 2016 (percent)

Table 2-16 Level of Agreement with Statement: “I enjoy purchasing pet products that pamper my dog or cat,” 2016 (percent)

Table 2-17 Level of Agreement with Pampering Statements, 2016 (percent)

Humanization of Pet Food

Illustration 2-1 Grande Frappuccino/Yappuccino

Illustration 2-2 Star Wars Treats at Petco

Older Pets

Table 2-18 Age of Dogs and Cats, 2016 (percent of pet owners)

Failing to Recognize a Weight Problem

Table 2-19 Agreement With Statement: “I have an overweight dog/cat,” 2015 vs. 2016 (percent)

Table 2-20 Level of Agreement with Statement: “I buy pet food/nutrition products related to weight/obesity for my dog(s) or cat(s),” 2014 vs. 2016 (percent)

Table 2-21 Percent of Pet Owners Who Have Purchased Any Type Of Pet Food, Food Add-In, Treat, or Nutritional Supplement Targeting Weight Loss or Maintenance in Last 3 Months, 2014 vs. 2016 (percent)

Product Safety Drives Purchase Decisions
Table 2-22 Level of Agreement with Statement: “Fear of pet food contamination/ product safety is a key consideration in the dog foods/cat foods I buy,” 2014-2016 (percent)
Table 2-23 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,” 2014-2016 (percent)
Figure 2-1 Level of Agreement with Statement: “I consider natural and organic pet foods to be safer than regular pet foods,” 2016 (percent)
Classroom Pets
Looking Ahead
Sales Growth Through 2020
Table 2-24 Projected U.S. Retail Sales of Pet Food, 2015-2020 (in billions of dollars)
Competitive Overview
M&A and Investment Activity
Petco Stirs Up Rumors, Then Lands with New Private Equity Firm
Petco, Blue Buffalo IPO Filings Offer Glimpse into Operations
Table 2-25 Blue Buffalo’s Net Sales and Growth, 2010-2015 (in millions of dollars)
Nestlé Purina Acquires Merrick
WellPet Acquires Sojos
J.M. Smucker Buys Big Heart Pet Brands
Spectrum Brands Buys Salix
Distributor Consolidation Continues
Other Deals
Just Three Players Have Double Digit Shares in Dog/Cat
Table 2-26 Top U.S. Marketers of Dog/Cat Food, 2015 (percent)
Big Three Capture Majority of Mass-Market Pet Food Sales
Table 2-27 Top Marketers of Pet Food at Food, Drug and Mass Merchandisers, 2015
Table 2-28 Leading Pet Food Companies and Their Top Product Categories, 2015
Top Brands in Pet Specialty
Natural/Organic Specialists
Veterinary Diet Marketers
Illustration 2-3 Display Ad for Hill’s Prescription Diet Metabolic + Mobility
Illustration 2-4 Display Ad for Hill’s Prescription Diet Metabolic + Mobility
Private Label Drops Again
Table 2-29 IRI-Tracked Sales of Private Label Pet Food: Total and by Category and Segment, 2015 (in millions of dollars, units and pounds)
Table 2-30 Private-Label Share of IRI-Tracked Sales of Pet Products: Total and by Food Category and Segment, 2014 vs. 2015 (percent)
Retail Channel Trends
PetSmart and Petco’s Sales Close in on $12 Billion
Table 2-31 PetSmart and Petco Sales and Number of Stores: 2001-2015 (cumulative, in units and millions of dollars)
Other Pet Specialty Chains
Walmart and Pets
Illustration 2-5 Pet Tips & Ideas on Walmart.com
Table 2-32 Walmart.com’s Top-Selling Pet SKUs
Selling at Supermarkets
Illustration 2-6 Ainsworth Pet Nutrition Advertorial
Online Sales
Table 2-33 Level of Agreement with Statement: “I am buying pet products online more than I used to,” 2011-2016 (percent)
Table 2-34 Time Frame for Most Recent Online Purchase of Pet Products, 2012-2016 (percent of pet owners)
Pet Consumer Trends
Pet Ownership and Population Trends
Table 2-35 Household Penetration Rates for Selected Pet- Owning Classifications, 2011-2015 (percent of and number of U.S. households in millions)
Table 2-36 Household Penetration Rates for Selected Dog- or Cat-Owning Classifications: 2010-2015 (percent of U.S. households)
Table 2-37 Household Populations for Selected Dog- or Cat-Owning Classifications: 2010-2015 (thousands of U.S. households)
Boomers and Millennials
Table 2-38 Household Penetration Rates for Selected Pet-Owning Classifications: By Generational Cohort, 2015 (percent of U.S. households)
Table 2-39 Household Populations for Selected Pet-Owning Classifications: By Generational Cohort, 2015 (number of U.S. households in thousands)
Table 2-40 Indexes for Selected Pet-Owning Classifications: By Generational Cohort, 2015 (U.S. households)
Table 2-41 Indexes for Dog or Cat Ownership: By Age Cohort, 2011 vs. 2015 (U.S. households)
Table 2-42 Number of Total U.S. Population Growth for Selected Age Brackets: 2015-2060 (in thousands)
Table 2-43 Share of Total U.S. Population Growth for Selected Age Brackets: 2015-2060 (in percent)
Pet Food Expenditures and Household Income
Figure 2-2 $70K+ Household Share of U.S. Pet Food Market Expenditures, 2002-2014 (percent)
Multiple Pet Ownership Trends
32% of Pet Households Keep Multiple Types
Table 2-44 Multiple Pet Ownership in the United States by Animal Type, 2011 vs. 2015 (percent of pet-owning households)
Pet Household Demographics
Table 2-45 Demographics of Dog and Cat Owners, 2015 (index)
Table 2-46 Demographics of Other Pet Owners, 2015 (index)
Organic Pet Food and Channel Choices
Table 2-47 Purchasing Rates for Organic Pet Food by Channel Shopped for Pet Products, 2014 (percent of U.S. households with pets)
Coupon Use Goes Down
Figure 2-3 Use of Pet Food Coupons: Dog Owners vs. Cat Owners, 2010-2015 (percent)
Illustration 2-7 Coupon for TetraMin
Chapter 3: Product and Marketing Trends
Natural Products Dominate Trends
Figure 3-1 Level of Agreement with Statement: “Natural/organic brand pet products are often better than standard national brand products,” 2012 vs. 2016 (percent of pet owners)
Figure 3-2 Level of Agreement with Statement: “I place a high priority on buying pet food with natural ingredients,” 2016 (percent)
Figure 3-3 Level of Agreement with Statement: “Natural pet products sold in pet stores and pet superstores are superior to those sold in general stores such as supermarkets or supercenters,” 2016 (percent)
The Market for Senior, Weight Management and Special Needs Products
Figure 3-4 Share of U.S. Retail Sales of Senior, Weight Management and Special Needs Pet Products by Category, 2015 (percent)
Channel-Specific Marketing
Food Brands Do Good
Table 3-1 Level of Agreement with Statement: “The participation by pet product retailers in pet welfare and rescue causes and events plays a significant role in where I buy pet products,” 2014-2016 (percent)
Table 3-2 Level of Agreement with Statement: “The participation by pet product brands in pet welfare and rescue causes and events plays a significant role in which brands I buy,” 2014-2016 (percent)
Table 3-3 Agreement with Statement: “I have contributed time or money to pet welfare or rescue causes,” 2015-2016 (percent)
Marketers Get Creative in the Digital Realm
Table 3-4 Technologies Used in the Last Seven Days, Pet Owners vs. Non-Pet Owners
Illustration 3-1 Personalized E-mail for Thanksgiving from Purina
Preventive Health Benefits of Pet Food Emphasized
Table 3-5 Level of Agreement with Statement: “High-quality dog foods/cat foods are effective for preventive health care,” 2014-2016 (percent)
Illustration 3-2: Screenshot of Hill's Healthy Advantage website
Marketers Compete Through Product Claims
Table 3-6 Dog and Cat Owners Currently Using Pet Food:
By Claim, 2015 (percent)
Grain-Free and Other “Free-Of” Claims
Illustration 3-3 Chicken Soup for the Soul Grain-Free Wet Cat Food
Table 3-7 Dog and Cat Owners Currently Using Pet Food: By Free-Of Claim, 2015 (percent) Nutrition Claims
Table 3-8 Dog and Cat Owners Currently Using Pet Food: By Nutrition Claims, 2015 (percent) Proteins
Table 3-9 Agreement with Statement: “My dog/cat needs a high-quality protein diet,” 2016 (percent)
Table 3-10 Dog and Cat Owners Currently Using Pet Food: By Nutrition Claims, 2015 (percent) Exotic Proteins
Table 3-11 Pet Food Purchases by Meat Ingredient, 2016 (percent)
Table 3-12 Pet Food Purchases by Poultry/Game Bird Ingredient, 2016 (percent)
Table 3-13 Pet Food Purchases by Fish/Seafood Ingredient, 2016 (percent)
Table 3-14 Pet Treat Purchases by Ingredient, 2016 (percent)
Other Ingredients
Table 3-15 Agreement with Statement: “Vegetables are good for my dog/cat,” 2016 (percent)
Table 3-16 Pet Food Purchases by Other Ingredients, 2016 (percent) Innovation Springs from Natural Players New Products Lever an Array of Natural Product Benefits
What's New in Ancestral
Illustration 3-4 Natural Balance Wild Pursuit Lamb Lung and Venison
Lung Bites Limited Ingredient Diets
Diets for Every Pet Type
Size-Weight Diets
Table 3-17 Dog Food Purchasing by Size Formulation, 2015 (percent) Functional Diets
Figure 3-5 Functional Dog and Cat Food Usage by Type, 2015 (percent)
Figure 3-6 Functional Dog and Cat Treat Usage by Type, 2015 (percent)
Home-Delivered Pet Food
Illustration 3-5 Screenshot of PetPlate
Table 3-18 Agreement with Statement: “I regularly have dog or cat food delivered to my home,” 2016 (percent)
Home-Cooked Meals
Table 3-19 Home-Cooked Meal Preparation in Last 30 Days, 2106 (percent)
Food Toppers
Table 3-20 Pet Owner Use of Food Add-ins, 2016 (percent)
Illustration 3-5 Trade Ad for The Honest Kitchen’s Proper Toppers Making the (Human) Grade Innovative New Products
Illustration 3-6 Trade Ad for Zuke’s Ascent
In the Raw
Illustration 3-7 Trade Ad for Sojos Complete Goat Recipe
Treat Trends
Illustration 3-8 Vitacraft Purrk! KitCubes Trends in Non-Dog/Cat Pet Food
Illustration 3-9 Trade Ad for Scarlett Pet Food's MardiGras Marketing Trends in Other Pet Food
Chapter 4: Dog Food Market Size and Growth Historical and Projected Dog Food Retail Sales
Table 4-1 U.S. Retail Sales of Dog Food, 2011-2020 (in millions of dollars) IRI-Tracked Dollar and Volume Sales of Dog Food
Table 4-2 IRI-Tracked Sales of Pet Food: Total and by Category and
Segment, 2015 (in millions of dollars, units and pounds)
Table 4-3 Share of IRI-Tracked Sales of Dog Food by Segment, December 2015 (percent)
Marketer and Brand Shares
Dry Dog Food Champions
Table 4-4 Marketers and Brands of Dry Dog Food by IRI-Tracked Sales and Market Share, 2014 vs. 2015
Dog Treat Category Ruled by Big Three
Table 4-5 Marketers and Brands of Dog Biscuits/Treats/Beverages by IRI-Tracked Sales and Market Share, 2014 vs. 2015
Mars Leads in Wet Dog Food
Illustration 4-1 Cesar Home Delights Trial Offer at Dollar General
Table 4-6 Marketers and Brands of Wet Dog Food by IRI-Tracked Sales and Market Share, 2014 vs. 2015
Freshpet Continues to Capture Frozen/Refrigerated Dog Food Category
Table 4-7 Marketers and Brands of Frozen/Refrigerated Dog Food by IRI-Tracked Sales and Market Share, 2014 vs. 2015
Just Two Options in Semi-Moist Segment
Table 4-8 Marketers and Brands of Semimoist Dog Food by IRI-Tracked Sales and Market Share, 2014 vs. 2015
Dog Food Purchasing Patterns
Most Dog Owners Buy Dry Dog Food and Biscuits/Treats
Table 4-9 Dog Food Purchasing Patterns by Type, 2011 vs. 2015 (percent of U.S. dog-owning households)
Table 4-10 Dog Food Purchasing by Formulation, 2015 (percent)
Milk-Bone Has Best Household Penetration by Wide Margin
Table 4-11 Dog Food and Treat Brand Consumption Trends, 2011-2015 (percent and number of households (in 000)
Chapter 5: Cat Food
Market Size and Growth
Historical and Projected Cat Food Retail Sales
Table 5-1 U.S. Retail Sales of Cat Food: 2011-2020 (in millions of dollars) .. 185
IRI-Tracked Dollar and Volume Sales
Table 5-2 IRI-Tracked Sales of Cat Food: Total and by Category and Segment, 2015 (in millions of dollars, units and pounds)
Table 5-3 Share of IRI-Tracked Sales of Cat Food by Segment, December 2015 (percent)
Marketer and Brand Shares
One Marketer Owns Wet Cat Food
Table 5-4 Marketers and Brands of Wet Cat Food by IRI-Tracked Sales and Market Share, 2014 vs. 2015
Top Players Show Weakness in Dry Cat Food
Table 5-5 Marketers and Brands of Dry Cat Food by IRI-Tracked Sales and Market Share, 2014 vs. 2015
Mars Is King of Cat Treats
Table 5-6 Marketers and Brands of Cat Snacks/Beverages by IRI-Tracked Sales and Market Share, 2014 vs. 2015
Refrigerated Cat Food Segment is Tiny
Semi-moist Cat Food Revitalized by Broths
Table 5-7 Marketers and Brands of Semi-Moist Cat Food by IRI-Tracked Sales and Market Share, 2014 vs. 2015
Cat Food Purchasing Patterns
Canned Food Is Stronger in Cat Arena
Table 5-8 Cat Food Purchasing Patterns by Type, 2011 vs. 2015 (percent of U.S. dog-owning households)
Table 5-9 Cat Food Purchasing by Formulation, 2015 (percent)
Friskies Tops Cat Brands
Table 5-10 Cat Food and Treat Brand Consumption Trends, 2011-2015 (percent and number of households (in 000)
Chapter 6: Other (Non-Dog/Cat) Pet Food
Introduction
Category Scope
Market Size and Growth
Historical and Projected Other Pet Food Sales
Table 6-1 U.S. Retail Sales of Other Pet Food: 2011-2020
(in millions of dollars)
IRI-Tracked Dollar and Unit Sales
Table 6-2 IRI-Tracked Sales of Other Pet Food, 2015
(in millions of dollars, units and pounds)
Competitive Trends
Marketer Overview
IRI-Tracked Outlets Led by Central Garden & Pet
Table 6-3 Marketers and Brands of Non-Dog/Cat Pet Food by
IRI-Tracked Sales and Market Share, 2014 vs. 2015

Ordering: Order Online - http://www.researchandmarkets.com/reports/3634206/
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 Food in the U.S., 12th Edition
- **Web Address:** [http://www.researchandmarkets.com/reports/3634206/](http://www.researchandmarkets.com/reports/3634206/)
- **Office Code:** SCH3CKDA

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

<table>
<thead>
<tr>
<th>Quantity</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Electronic (PDF) - Single User:</td>
<td>USD 4500</td>
</tr>
<tr>
<td>Electronic (PDF) - Enterprisewide:</td>
<td>USD 9000</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:

<table>
<thead>
<tr>
<th>Account number</th>
<th>833 130 83</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sort code</td>
<td>98-53-30</td>
</tr>
<tr>
<td>Swift code</td>
<td>ULSBIE2D</td>
</tr>
<tr>
<td>IBAN number</td>
<td>IE78ULSB98533083313083</td>
</tr>
</tbody>
</table>
| 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