U.S. Pet Market Outlook, 2016-2017

Description:
The future of the pet industry continues to look bright. The industry picked up the pace in 2015, compared to 2014 when sales were not as strong. And the outlook for 2016 and beyond looks even better, as warm weather across the U.S. is sure to perk up sales. Changes are also in the air in terms of market dynamics. Private equity has shown considerable interest in pet retail, with a host of investments in the major players – including PetSmart, Petco and Pet Supermarket. The veterinary channel is also seeing changes, including acquisitions from Mars PetCare and VCA. Services, both veterinary and non-medical, have been moving across channels, as more retailers offer grooming, boarding, training and veterinary clinics.

U.S. Pet Market Outlook 2016-2017 features all new survey questions from Packaged Facts proprietary Pet Owner Survey, the latest in market sizing and projections, demographic trends among both pet owners and pets, new product trends and marketing developments. The report has everything you need to know about mergers and acquisitions, retail channel trends and spending habits. Our coverage includes the latest in pet food trends – from exotic proteins to food toppers – as well as insights into pet supplies.

With Packaged Facts' extensive monitoring of the pet market our report is the go-to source for a complete understanding of the U.S. pet industry. In its 8th edition, the report evaluates current trends and future directions for marketing and retailing, along with consumer patterns across the full spectrum of the market, including veterinary services, pet food, nonfood pet supplies, and non-medical pet services (grooming, boarding, training, etc.). The report forecasts market size and growth for each category; examines new product activity; surveys retail channel trends including cross-channel shopping vs. shopper loyalty; and analyzes trends and shifts in the needs of today's pet parents. The report tabulates pet product sales channel by channel, using data from sources including IRI, whose Market Advantage service tracks sales in supermarkets, drugstores, mass merchandisers including Walmart, and select club stores, dollar stores and military commissaries; food sales in the pet specialty, farm/feed and veterinary channels from GfK; and SPINS, Inc., whose SPINScan service tracks sales in the natural supermarket channel and in the specialty gourmet supermarket channel. Supplementing Packaged Facts' exclusive Pet Owner Survey is an extensive analysis of Simmons National Consumer Studies, which is based on approximately 25,000 adult respondents surveyed annually. The report contains dozens of numerical tables and charts, as well as numerous photographs of new products, advertising, screen shots and other images across key channels.

Contents:
Chapter 1: Executive Summary
Introduction
Scope and Methodology
Report Methodology
Market Performance
Pet Industry Picks Up Pace
Table 1-1 U.S. Pet Market Retail Sales by Category, 2011-2015(in billions of dollars)
Market Share by Category and Animal Type
Reduced Spending Remains the New Normal for Some
Table 1-2 Level of Agreement with Statement: “I am spending less on pet products because of the economy,” 2011-2016 (percent)
Older Pets
Small Dog Trend
Higher-Income Households Crucial to Industry
Human/Animal Bond a Key Catalyst
Humanization
Digital Usage
Industry Trends
Market Structure
M&A and Investment Activity
Veterinary Services Inside Pet Superstores
Mobile Clinics Encroaching on Veterinarian Turf
Innovation in the Pet Industry
Natural Food Dominates the Pet Food Market
Retail Trends
Ubiquity of Pet Products
The Demand for Discounts
Table 1-3 Level of Agreement with Statement: “I look out for lower prices, special offers, and sales on pet products,” 2013-2016 (percent)
Purchase Trends by Channel
Walmart Has Largest Draw Among Pet Product Shoppers
Pet Ownership Trends
Pet Ownership at 56% of U.S. Households
Table 1-4 Household Penetration Rates for Selected Pet-Owning Classifications, 2011-2015 (percent of and number of U.S. households in millions)
Dog and Cat Ownership Rates by Age
Table 1-5 Dog or Cat Ownership Rates by Age Bracket, 2009-2015 (percent of U.S. households)
Multiple Pet Ownership Trends

Chapter 2 Highlights
Chapter 2: Market Trends
Market Performance
Pet Industry Picks Up Pace
Table 2-1 U.S. Pet Market Retail Sales by Category, 2011-2015 (in billions of dollars)
Table 2-2 U.S. Pet Market Retail Sales Annual Change by Category, 2011-2015 (percent change over previous year)
Table 2-3 Projected Total U.S. Retail Sales of Pet Products and Services, 2015-2020 (in billions of dollars)
Table 2-4 Projected U.S. Pet Market Retail Sales by Category, 2016-2020 (in billions of dollars)
Table 2-5 U.S. Pet Market Compound Annual Growth Rates by Category: 2010-2015 vs. 2015-2020 (percent)
Market Share by Category and Animal Type
Table 2-6 Category Share of U.S. Pet Market Retail Sales: 2010, 2015, 2020 (percent)
Table 2-7 Category Share of U.S. Pet Market Retail Sales by Animal Type: Dog, Cat, Other, 2015 (percent)
Share of Pet Product Sales by Channel
Table 2-8 Share of U.S. Retail Channel Sales of Pet Products by Channel Classification, 2015 (percent)
IRI-Tracked Channels See Gains
Table 2-9 IRI-Tracked Sales of Pet Products: Total and by Food and Nonfood Category and Segment, December 2015 (in millions of dollars, units and pounds)
Pet Food Keeps Rolling in Pet Specialty Channels
Table 2-10 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 2-11 Retail Dollar Sales of Pet Food and Pet Care in the Natural Supermarket and Specialty/Gourmet Channels, 2014 vs. 2015 (in millions of dollars)
Market Drivers
Consumers Optimistic About Economy, Depending on Whom You Ask
Table 2-12 Pet Owners: Overview by Change in Financial Situation Compared with 12 Months Ago, 2012-2015 (percent and index for U.S. pet-owning households)
Table 2-13 Pet Owners: Overview by Expectations for Personal Financial Situation Over the Next 12 Months, 2012-2015 (percent and index for U.S. pet-owning households)
Reduced Spending Remains the Norm for Some
Table 2-14 Level of Agreement with Statement: “I am spending less on pet products because of the economy,” 2011-2016 (percent)
Consumers Tend to Consider Pet Products Too Expensive
Table 2-15 Level of Agreement with Statement: “Many pet products are becoming too expensive,” 2011-2016 (percent)
Pet Owners’ Monthly Spend
Table 2-16 Amount Spent on Pet Products in Last 30 Days, February 2016 (percent by spending bracket)
Table 2-17 Pet Food Purchasing by Price Level, 2014-2016 (percent of dog owners vs. cat owners)
Pet Ownership and Population Trends
Table 2-18 Household Penetration Rates for Selected Pet-Owning Classifications, 2011-2015 (percent of and number of U.S. households in millions)
Give Me Shelter
Pet Owners Downsize
Table 2-19 Size of Pet Dogs, 2012-2016 (percent of dog owners)
Table 2-20 Size of Most Recently Acquired Pet Dog, 2014-2016 (percent of dog owners)
The Market for Senior, Weight Management and Special Needs Products
Figure 2-1 Share of U.S. Retail Sales of Senior, Weight Management and Special Needs Pet Products by Category, 2015 (percent)
Older Pets
Table 2-21 Age of Dogs and Cats, 2016 (percent of pet owners)
Failing to Recognize a Weight Problem
Table 2-22 Agreement with Statement: “I have an overweight dog/cat,” 2015 vs. 2016 (percent)
Industry Banks on Higher-Income Households
Table 2-23 Share of Total U.S. Pet Market Expenditures: $70K+ vs. Under $70K Income Households, 2001-2014 (percent)
Table 2-24 $70K+ Household Share of U.S. Pet Market Expenditures: By Category, 2009-2014 (percent)
Human/Animal Bond a Key Catalyst
Table 2-25 Pet Food Purchasing by Price Level, 2014-2016 (percent of dog owners vs. cat owners)
Table 2-26 Agreement with Statement: “My dog or cat has a positive impact on my physical health,” 2016 (percent)
Table 2-27 Agreement with Statement: “I enjoy purchasing pet products that pamper my dog or cat,” 2016 (percent)
Table 2-28 Level of Agreement with Pampering Statements, 2016 (percent)
Humanization
Classroom Pets
Digital Usage
Table 2-29 Technologies Used in the Last Seven Days, Pet Owners Vs. Non-Pet Owners
All for a Good Cause
Table 2-30 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 2-31 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 2-32 Agreement with Statement: “I have contributed time or money to pet welfare or rescue causes,” 2015 vs. 2016 (percent of dog owners vs. cat owners)
Chapter 3 Highlights
Chapter 3: Industry Trends
Introduction
Market Structure
M&A and Investment Activity
Petco Stirs Up Rumors, Then Lands with New Private Equity Firm
Mars PetCare Adds to Veterinary Portfolio
Mars PetCare Buys Whistle
More Veterinary Practices Consolidate
Petco, Blue Buffalo IPO Filings Offer Glimpse into Operations
Table 3-1 Blue Buffalo’s Net Sales and Growth, 2010-2015 (in millions of dollars and percent change)
Jaguar Animal Health Runs to Public Markets
Oasmia Debuts on NASDAQ
Sanofi and Boehringer Ingelheim in Talks Over Merial
Bayer Could Consider Sale
Nestlé Purina Acquires Merrick
Wellpet Acquires Sojos
Dechra Acquires Putney
Patterson Buys Animal Health International
Distributor Consolidation Continues
Other Deals
Pet Services
Retailers and Vets Continue to Add Services
Veterinary Services Led by Banfield and VCA
Veterinary Services Inside Pet Superstores
Table 3-2 Percentage of Dog or Cat Owners Who Have Taken Pets to a Pet Superstore for Veterinary Services in Last 12 Months, 2016
Veterinary Visit Statistics
Table 3-3 Percentage of Dog and Cat Owners Who Have Visited Vet in Last 12 Months, 2016
Oral Care Services
Figure 3-1 Level of Agreement with Statement: “I am concerned about the dental hygiene/breath odor of my pets,” 2015 (percent)
Mobile Clinics Encroaching on Veterinarian Turf
Table 3-4 Percentage of Dog or Cat Owners Who Have Visited a Mobile Veterinary Clinic in Last 12 Months, 2016
Pet Specialty Chains Bank on Non-Medical Services
Table 3-5 PetSmart and Petco Sales of Pet Services, 2001-2015 (separately and combined, in millions of dollars)
Table 3-6 Percentage of Dog or Cat Owners Who Have Taken Pets to a Pet Superstore for Non-Medical Pet Services in Last 12 Months, 2016 (percent)
Top Service Types
Table 3-7 Top Pet Service Types: Last 12 Months vs. Last 30 Days, 2016 (percent of dog owners vs. cat owners)
Innovation in the Pet Industry
Pet Products
New Product Roundup
Preventive Health Benefits of Pet Food Emphasized
Table 3-8 Level of Agreement with Statement: “High-quality dog foods/cat foods are effective for preventive health care,” 2014-2016 (percent)
Product Safety Drives Purchase Decisions
Table 3-9 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 of dog owners vs. cat owners)
Table 3-10 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 of dog owners vs. cat owners)
Figure 3-2 Level of Agreement with Statement: “I consider natural and organic pet foods to be safer than regular pet foods,” 2016 (percent)
Natural Food Dominates the Pet Food Market
Figure 3-3 Level of Agreement with Statement: “Natural/organic brand pet products are often better than standard national brand products,” 2012 vs. 2014 vs. 2016 (percent of pet owners)
Interpreting Natural
Pet Food Leaders
Grain-Free and Other Free-Of Claims
Table 3-11 Dog and Cat Owners Currently Using Pet Food, By Free-Of Claim, 2015 (percent)
What’s New in Ancestral Proteins
Table 3-12 Agreement with Statement: “My dog/cat needs a high quality protein diet,” 2016 (percent of dog owners vs. cat owners)
Senior, Weight Management and Special Needs Products Near $3.8 Billion
Figure 3-4 Share of U.S. Retail Sales of Senior, Weight Management and Special Needs Pet Products by Category, 2015 (percent)
Diets for Every Pet Type
Home-Cooked Pet Food
Food Toppers
Treat Trends
Oral Care Products
Trends in Non-Dog/Cat Pet Food
Holiday-Themed Pet Products and Services on the Rise
Table 3-13 Agreement with Statement: “Over the recent Christmas/Winter Holiday season, my dog(s)/cat(s) got special gifts or treats,” 2015 vs. 2016 (percent of dog owners vs. cat owners)
The Nonfood Pet Supplies Market
Pet Supply Sales Has Multiple Drivers
The Pet Medications Market
Multi-Tier Market: Veterinary, Pet Specialty, and Mass
Figure 3-5 Share of U.S. Retail Sales of Pet Medications by Distribution Channel, 2015 (percent)
Lightweight Now Heavyweight in Litter Category
Pet Travel
Table 3-14 Travel Activities of Dog and Cat Owners in Last 12 Months, 2016 (percent of dog owners vs. cat owners)
Crates, Carriers, and Pet Shelters
Chapter 4 Highlights
Chapter 4: Retail Trends
Ubiquity of Pet Products
The Demand for Discounts
Table 4-1 Level of Agreement with Statement: “I look out for lower prices, special offers, and sales on pet products,” 2013-2016 (percent)
Spending More on Pet Products
Table 4-2 Level of Agreement with Statement: “I am willing to pay more for pet food products that are healthier for my pets,” 2015 (percent)

Coupon Use Goes Down
Figure 4-1 Percent Who Use Pet Food Coupons: Dog Owners vs. Cat Owners, 2010-2015 (percent)

Consumer Loyalty Levels Off
Table 4-3 Channel Loyalty in Pet Product Purchasing: All Channels, 2008-2015 (percent and number)
Table 4-4 Share of Customer Base Who Are Channel-Loyal by Leading Retail Channels or Pet Superstore Chains, 2009-2015 (percent)
Table 4-5 Channel-Loyal Customer Base for Pet Products by Leading Retail Channel or Pet Superstore Chain, 2009-2015 (number in thousands)

Pet Product Purchasing Rates by Channel
Table 4-6 Household Purchasing Overview for Pet Products by Retail Classification: U.S. Households Overall vs. Dog or Cat Owners, 2015 (number and percent)
Purchase Trends by Channel
Table 4-7a Purchasing Rates for Pet Products by Selected Retail Channels and Pet Superstore Chains, 2011-2015 (percent)
Table 4-7b Purchasing Base for Pet Products by Selected Retail Channels or Pet Superstore Chains, 2011-2015 (U.S. dog or cat)

Walmart Draws Top Percentage of Pet Product Shoppers
Table 4-8 Channel Choices for Pet Product Shopping, Last Three Months: Pet Food, Pet Medications, Other Pet Supplies, 2015 vs. 2016 (percent of pet product buyers)

Private Label Gains Overall
Table 4-9 IRI-Tracked Sales of Private Label Pet Products: Total and by Category and Segment, 2015 (in millions of dollars, units and pounds)
Table 4-10 Private-Label Share of IRI-Tracked Sales of Pet Products: Total and by Food Category and Segment, 2014 vs. 2015 (percent)

National Brands Outpace Private Label
Table 4-11 IRI-Tracked Sales of Branded Pet Products: Total and by Category and Segment, 2015 (in millions of dollars, units and pounds)

The Mass-Market

Walmart and Pets
Table 4-12 Walmart.com’s Top-Selling Pet SKUs
Target’s Bullseye Mascot Returns to Spotlight

Pet Specialty Chains
PetSmart and Petco’s Sales Close in on $12 Billion
Table 4-13 PetSmart and Petco Sales and Number of Stores, 2001-2015 (aggregated, in units and millions of dollars)

The Strategy of Exclusivity
Small Format Stores Designed with Millennials in Mind
Other Pet Specialty Players
Selling at Supermarkets

Wholesale Clubs
Drugstores/Convenience Stores

Online Sales
Table 4-14 Level of Agreement with Statement: “I am buying pet products online more than I used to,” 2011-2016 (percent)
Table 4-15 Time Frame for Most Recent Online Purchase of Pet Products, 2012-2016 (percent of pet owners)

Other Retail Markets
The Pet Professionals
Natural Supermarkets

Dollar Stores
Agricultural/Feed-Seed Stores

Home Improvement Stores and Hardware Stores
Luxury Retailers

Food Co-ops

Chapter 5 Highlights
Chapter 5: Pet Ownership Trends
Pet Ownership at Almost 56% of U.S. Households
Table 5-1 Household Penetration Rates for Selected Dog- or Cat- Owning Classifications, 2010-2015 (percent of U.S. households)
Table 5-2 Household Populations for Selected Dog- or Cat-Owning Classifications, 2010-2015 (thousands of U.S. households)
Table 5-3 Household Penetration Rates for Selected Pet-Owning Classifications, 2011-2015 (percent of and number of U.S. households in millions)

Table 5-4 Dog or Cat Ownership Rates by Age

Table 5-5 Multiple Pet Ownership Rates by Age Bracket, 2009-2015 (percent of U.S. households)

Table 5-6 Ownership of Multiple Pets of a Single Type, 2011 vs. 2015 (percent of U.S. households who own a given type of pet)

Table 5-11 Total U.S. Population Growth for Selected Age Brackets, 2015-2060 (in thousands)

Table 5-12 Share of Total U.S. Population Growth for Selected Age Brackets, 2015-2060 (in percent)

Table 5-13 Pet Ownership Grows Among Minorities

Table 5-14 Pet Owner Psychographics

Table 5-24 Selected Health & Medical Psychographics: Dog Owners vs. Cat Owners vs. Other Pet Owners, 2015 (percent and index)

Table 5-25 Selected Health & Medical Psychographics: Dog or Cat Owners Overall vs. Purchasers of Selected Superpremium Pet Brands, 2015 (percent and index)

Table 5-26 Selected Sustainability Related Psychographics: Dog Owners vs. Cat Owners vs. Other Pet Owners, 2015 (percent and index)

Table 5-27 Selected Sustainability Related Psychographics: Dog or Cat Owners Overall vs. Purchasers of Selected Superpremium Pet Brands, 2015 (percent and index)

Table 5-28 Selected Media and Marketing Related Psychographics: Dog Owners vs. Cat Owners vs. Other Pet Owners, 2015 (percent and index)

Ordering:
Order Online - http://www.researchandmarkets.com/reports/3723872/
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:** U.S. Pet Market Outlook, 2016-2017
- **Web Address:** http://www.researchandmarkets.com/reports/3723872/
- **Office Code:** SCPL2KKB

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

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

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