Natural, Organic, and Eco-Friendly Pet Products in the U.S., 6th Edition

Description: Tracking a movement that started slowly but has since gone full steam ahead, "Natural, Organic and Eco-Friendly Pet Products in the U.S." explores how natural pet products are becoming increasingly common in mass-market channels while trying to remain true to their pet specialty roots. Whereas ten years ago natural, organic and eco-friendly (NOEF) pet products were still primarily the province of smaller outfits selling through the pet specialty channel, today virtually all major and mid-level pet market players offer at least some natural or eco-friendly products. The growth of the natural pet market correlates in part with the growing number of natural players exclusive to the pet specialty channel. But it is incursion by companies centered in the mass market, via line extension or acquisition, that has brought the pet industry's largest competitors onto the natural playing field, where ongoing experimentation and expansion promises to keep them firmly entrenched.

"Natural, Organic and Eco-Friendly Pet Products in the U.S." also examines how the growth of the natural pet market is fueled in part by human market trends. The environmental, safety, and social concerns that are important to U.S. consumers when purchasing products for themselves frequently also influence their pet product purchases, so the perennial strong performance of natural, organic and eco-friendly products on the human side—where these trends are much further along—suggests solid market growth potential for pet. Another human/pet market driver is the demand for increased transparency in product content and composition, increasing the importance of both what is—and at times even more importantly, what isn't—in a product. At the same time, although natural and organic products benefit from the consumer perception, whether real or imagined, that they are purer and safer than regular products, product safety is a growing factor given the many recalls of the past few years.

Natural, Organic and Eco-Friendly Pet Products in the U.S. breaks out the natural pet market into two broad classifications:

- Pet Food: Because the term “natural” has no current legal definition, and thus has limited stand-alone appeal, and because of the ever-growing demand for high-quality pet foods that offer enhanced nutrition, a focus on ingredients has skyrocketed in the natural pet food space in the past ten years. One of the trends illustrating this phenomenon is the increased interest in human-grade foods and ingredients; another is the “must-have” status of grain-free pet foods. While organic pet foods make up a very small part of the overall pet food market, due to supply issues, high prices, and lack of pet market specific regulation, organic pet foods are expected to advance as these impediments are remedied. Other pet food trends covered include grass-fed and free-range foods, exotic proteins, “ancient grains,” and plant-based protein alternatives.
- Pet Care Products: Defined as encompassing all non-food pet supplies (cat litter, grooming products, flea/tick care products, supplements, clean-up products, etc.), the pet care products market is distinguished by the importance of environmental or “green” appeals, a trend that encompasses the materials the products are made of, the packages they come in, and the sustainability practices of the companies who make them.

Building on the analysis presented in the previous five editions of this report, this fully updated sixth edition of "Natural, Organic and Eco-Friendly Pet Products in the U.S." covers historical and projected retail sales estimates from 2012 through 2021, competitive strategies of key players, and trends in new product development such as grain-free, grass-fed, superfood ingredients, human-grade, raw pet food (including freeze-dried and dehydrated), eco-friendly nonfood pet products, corporate sustainability initiatives, and retail channel trends. Featuring exclusive data from National Pet Owner Surveys, the report homes in on food and non-food purchasing trends across multiple categories, as well as attitudes and demographic characteristics of natural and organic pet product purchasers. Additional data sources include IRI marketer/brand sales data for mass-market channels, SPINSscan data for the natural supermarket channel and specialty gourmet channels, and Simmons data profiling trends in pet ownership and purchasing attitudes and product preferences.

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