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General Mills’ April 2018 acquisition of Blue Buffalo started the year with an industry-shaking bang, and as of December 2018 the US pet food market has seen over a dozen additional acquisitions. Deals like General Mill’s purchase of Blue Buffalo and JM Smucker’s purchase of Ainsworth, as well as Nestlé’s reported interest in acquiring Champion Petfoods, spotlight the trend of top marketers of packaged human foods looking to diversify or increase their involvement in pet foods, which is understandable considering that US retail sales of pet food rose more than 4% in 2018 compared with just over 1% growth in retail sales of packaged human foods.

Also looking to diversify, pet food industry leaders are branching out beyond their core business into other areas of the pet market, as seen in Mars’ expansion into veterinary and DNA (deoxyribonucleic acid) canine testing, and Purina’s expansion into digital pet owner platforms and custom dog food. Demonstrating the trend of smaller marketers purchasing even smaller brands they view as forward-looking and synergistic is Barkstrong, which acquired two natural pet food brands in May 2018 and a third in June.

Leading Dog Food Marketers

Three marketers dominate the mass-market dog food space – Nestlé Purina, Mars, and JM Smucker – all of which also have a strong presence in the pet specialty channel. Despite the erosion of the divide between pet specialty and mass, some brands remain loyal to the pet specialty channel, such as Colgate-Palmolive’s Hill’s, which is also strong in the veterinary channel.

Nestlé Purina’s Hold on Cat Food

Nestlé Purina’s Friskies and Fancy Feast cat food are two of the top brands in mass outlets in the cat food market. Friskies features six dry sub-brands and eight wet sub-brands. As its name suggests, Nestlé Purina’s other cat food brand, Fancy Feast, falls squarely under...
the “gourmet” food umbrella. Another major participant in mass-market outlets is JM Smucker, with top brands including Meow Mix and 9 Lives. Mars is the third major player in this category, with brands including Iams and Whiskas in the dry food category; and Iams, Sheba, and Whiskas in the wet food category.

### Table 9 | Selected Suppliers to the US Pet Food Market

<table>
<thead>
<tr>
<th>Company (Division)</th>
<th>Select Brands</th>
</tr>
</thead>
<tbody>
<tr>
<td>American Pet Nutrition</td>
<td>Supreme Source</td>
</tr>
<tr>
<td>Central Garden &amp; Pet</td>
<td>AvoDerm</td>
</tr>
<tr>
<td>Colgate-Palmolive (Hill’s Pet Nutrition)</td>
<td>Ideal Balance, Science Diet</td>
</tr>
<tr>
<td>General Mills (Blue Buffalo)</td>
<td>BLUE</td>
</tr>
<tr>
<td>JM Smucker</td>
<td>Kibbles ‘n Bits, Meow Mix, Natural Balance, 9 Lives, Rachael Ray Nutrish</td>
</tr>
<tr>
<td>Mars</td>
<td>Cesar, Iams, Nutro, Pedigree, Royal Canin, Sheba, Whiskas</td>
</tr>
<tr>
<td>Midwestern Pet Foods</td>
<td>Earthborn Holistic, Pro-Pac</td>
</tr>
<tr>
<td>Nestlé (Purina)</td>
<td>Alpo, Beneful, Fancy Feast, Friskies, Moist &amp; Meaty, ONE, Pro Plan</td>
</tr>
<tr>
<td>Sunshine Mills</td>
<td>Evolve, Triumph</td>
</tr>
<tr>
<td>WellPet</td>
<td>Wellness</td>
</tr>
</tbody>
</table>

Source: Packaged Facts

### Veterinary Diet Marketers

The leading marketers of pet foods exclusive to the veterinary channel are Hill’s Pet Nutrition (Hill’s Prescription Diet), Mars (Royal Canin Veterinary Diets), Nestlé Purina (Purina Pro Plan Veterinary Diets), and Blue Buffalo (BLUE Natural Veterinary Diet). Available in both dry and canned forms, these pet foods are formulated with advanced ingredients and targeted to specific lifestages or health conditions, such as digestion, weight control, skin health, and joint health.
About This Report

Scope

This report forecasts US pet food retail sales in nominal US dollars for 2019-2023. To illustrate historical trends, total retail sales and the various segments are provided in annual series from 2014 to 2018. Total retail sales are segmented by type in terms of:

- dog food
- cat food

Both the dog and cat food segments are subdivided for 2018 into: dry, wet, frozen/refrigerated, and semi-moist.

The terms “wet” and “canned” are used interchangeably in this report.

The dog and cat food market includes certain edibles that obscure the boundaries between food, toys, and healthcare products. All dog/cat treats and non-food pet supplies – including chews (natural, rawhide, nylon) and supplements – are covered in other Packaged Facts pet reports, including Pet Treats and Chews in the U.S. and Pet Supplements in the U.S.. In addition, non-dog/cat food is covered in the following Packaged Facts pet reports:

- Bird Products: U.S. Pet Market Trends and Opportunities
- Fish and Aquarium Products: U.S. Pet Market Trends and Opportunities
- Small Animal Products: U.S. Pet Market Trends and Opportunities

Though discussed in context of the market as a whole, pet food sold through the veterinary channel and non-medical petcare service providers is not covered in the market sizing estimates, but rather is included in the market sizing for those channels as presented in Packaged Facts’ annual U.S. Pet Market Outlook reports.

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or r². The most stable data series relative to the trend carries an r² value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

A full outline of report items by page is available in the Table of Contents.
Sources

*Pet Food: United States* (FF10029) is based on *Pet Food in the U.S.*, a comprehensive industry study published by Packaged Facts. That study pinpoints strategic directions for current and prospective pet food marketers, with a forward-looking focus on high-growth product segments and market drivers. Covering foods for dogs and cats, the report examines trends by form (dry, wet, semi-moist, and frozen/refrigerated), ingredients, and product claims across the full retail spectrum including mass-market outlets, the pet specialty channel, online retailers, and other channels. It provides a comprehensive overview covering historical market size and projections (2014-2023), cross-market trends, consumer expenditures, market opportunities, mergers and acquisitions, channel trends including e-commerce and omnichannel, the Millennial impact, and new product and marketing trends.

Through custom surveying in Packaged Facts’ proprietary Surveys of Pet Owners, the study highlights consumer purchase patterns and product and brand preferences for dog and cat food as well as the market as a whole. Including dozens of product illustrations, it focuses particularly on trends in marketing and new product development, while also identifying key players in dog and cat food overall. Additional data sources include Simmons profiling trends in pet ownership, purchasing attitudes, and product preferences, including demographic trends down to the brand level, and SPINS data on the natural and gourmet channel.

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

Industry Codes

<table>
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<tr>
<th>NAICS/SCIAN 2007</th>
<th>North American Industry Classification System</th>
<th>SIC</th>
<th>Standard Industrial Classification</th>
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<tr>
<td>311111</td>
<td>Dog and Cat Food Mfg</td>
<td>2047</td>
<td>Dog and Cat Food</td>
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<tr>
<td>424490</td>
<td>Other Grocery and Related Products Merchant Wholesalers</td>
<td>5149</td>
<td>Groceries and Related Products, NEC</td>
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<tr>
<td>453910</td>
<td>Pet and Pet Supplies Stores</td>
<td>5199</td>
<td>Nondurable Goods, NEC</td>
</tr>
</tbody>
</table>

Source: US Census Bureau

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Resources

Packaged Facts

Pet Food in the U.S.

The Freedonia Group

Freedonia Industry Studies

Food Safety Products in the US
Global Food Processing Machinery
Natural Alternative Sweeteners Market in the US
Pouches in the US

Freedonia Focus Reports

Durable Petcare Products: United States
Pet Clean-Up & Odor-Control Products: United States
Pet Insurance: United States
Pet Medications: United States
Pet Oral Care: United States
Pet Products & Services: United States
Pet Supplements: United States
Pet Treats & Chews: United States

Freedonia Custom Research

Trade Publications

Pet Age
Pet Business
Petfood Industry
Pet Product News International
Veterinary Practice News

Agencies & Associations

American Kennel Club
American Pet Products Association
American Veterinary Medical Association
Association of American Feed Control Officials
Association for Pet Obesity Prevention
Private Label Manufacturers Association
United States Census Bureau
United States Department of Agriculture
United States Food and Drug Administration