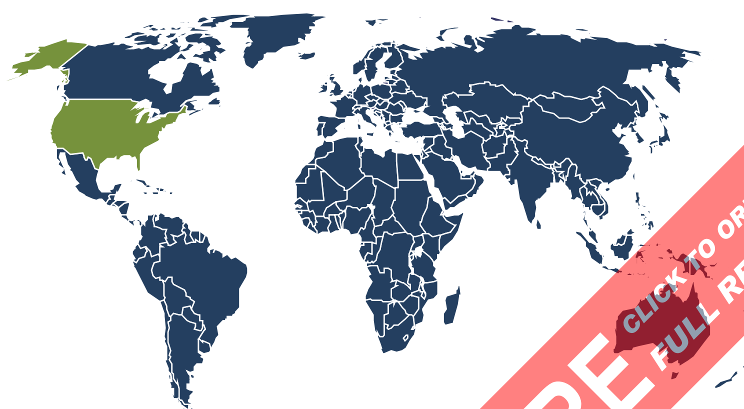
Freedonia Focus Reports
US Collection

# Pet Food:

## United States



March 2016

Highlights

Market Overview
Market Size and Growth | Market Outlook | Competitive Trends | Retail Trends
Pet Consumer Trends | Product and Marketing Trends
Dog Food Market Size and Growth | Cat Food Market Size and Growth
Other Pet Food Market Size and Growth

Companies Cited

Resources

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ABOUT THIS REPORT

## Scope & Method

This report forecasts annual US pet food sales in US dollars at the retail level for 2016-2020. Sales are categorized by product in terms of:

- dog food
- cat food
- other pet foods such as bird, small animal, fish, and reptiles.

The pet food market includes certain edibles that obscure the boundaries between food, toys, and healthcare products. However, all non-food pet supplies – including chews (natural, rawhide, and nylon) and supplements are not included in the scope of this report.

To illustrate historical trends, total pet food, dog food, cat food, and other pet food retail sales are provided in an annual series from 2011 to 2015.

This report quantifies trends in various measures of growth. 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. 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 US, 12th Edition*, a comprehensive industry report published by Packaged Facts in March 2016. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources.

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 Information Resources (which operates as IRI) for multi-outlet (MULO), which represents sales through US 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; sales data from GfK Retail & Technology Group covering pet specialty stores, veterinary clinics, and farm/feed stores; SPINSscan Natural data from Spins, which tracks sales in the natural supermarket channel and in the specialty gourmet supermarket channel; surveys of independent and chain pet store retailers; government data including US Bureau of Labor Statistics Consumer Expenditure Surveys; and figures from other market research sources.

Our analysis of pet ownership trends primarily relies on cross-tabulations of data compiled by Simmons, New York, New York. 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 US population.

These Simmons surveys allow for detailed psychographic and demographic consumer profiles across various markets and product categories. To highlight these patterns, an index system calibrates consumer behavior by a given segment of the population, compared with the population as a whole. For example, if a given type of pet is owned by 10% of the overall adult population, but by 20% of adults age 18-24, the 18- to 24-year-old segment indexes at 200, or twice the average rate. Generally speaking, Packaged Facts considers indexes of 120 or higher to be significantly above average.

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

## Industry Codes

The topic of this report is related to the following industry codes:

| **NAICS/SCIAN 2007**<br>North American Industry Classification System | | **SIC**<br>Standard Industry Codes | |
|---|---|---|---|
| 311111 | Dog and Cat Food Mfg | 2047 | Dog and Cat Food |
| 311119 | Other Animal Food Mfg | 2048 | Prepared Feed and Feed Ingredients for Animals and Fowls, Except Dogs and Cats |
| 424490 | Other Grocery and Related Products Merchant Wholesalers | 5149 | Groceries and Related Products, NEC |
| 453910 | Pet and Pet Supplies Stores | 5199 | Nondurable Goods, NEC |

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## RESOURCES

### The Freedonia Group

www.freedoniagroup.com

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|---|---|
| *Pet Food in the US, 12th Edition*, March 2016 | see report contents |
| Related Industry Studies | |
| *3383 Pouches*, February 2016 | see study contents |
| *3275 World Food Processing Machinery*, June 2015 | see study contents |
| Related Focus Reports | |
| *Meat & Poultry Products: United States* | see report contents |
| *Pet Food Packaging: United States* | see report contents |
| *Snack Foods: United States* | see report contents |
| *Salty Snacks: United States* | see report contents |
| Freedonia Custom Research | see capabilities |

### Trade Publications

| | |
|---|---|
| *Pet Age* | www.petage.com |
| *Pet Business* | www.petbusiness.com |
| *Pet Product News International* | www.petproductnews.com |
| *Petfood Industry* | www.petfoodindustry.com |
| *Progressive Grocer* | www.progressivegrocer.com |
| *Supermarket News* | http://supermarketnews.com |
| *Veterinary Practice News* | www.veterinarypracticenews.com |

### Agencies & Associations

| | |
|---|---|
| American Pet Products Association | www.americanpetproducts.org |
| Association of American Feed Control Officials | www.aafco.org |
| Experian Marketing Services | www.experian.com |
| GfK SE | www.gfk.com |
| Information Resources Inc | www.iriworldwide.com |
| Simmons National Consumer Survey | www.simmonssurvey.com |
| Spins LLC | www.spins.com |
| United States Census Bureau | www.census.gov |
| United States Department of Agriculture | www.usda.gov |
| United States Food and Drug Administration | www.fda.gov |
| United States International Trade Commission | www.usitc.gov |