



Freedonia Focus Reports
US Collection

Natural, Organic & Eco-Friendly Pet Products: United States

October 2016



Highlights

Market Overview

Market Definitions and Terminology | Market Trends | Market Outlook
Competitive Trends | Marketing and New Product Trends | Consumer Trends
Companies Cited

Resources

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ABOUT THIS REPORT

Scope & Method

This report forecasts annual US retail sales of natural, organic, and eco-friendly pet products in US dollars for 2016-2021. Total retail sales are segmented by type in terms of:

- pet food
- pet care.

Excluded from the scope of this report are “inherently natural” products such as bird seed, small animal litter, and “natural treats” for dogs (rawhide chews, pig’s ears, etc).

To illustrate historical trends, total retail sales and type segments are provided in annual series for 2012-2015.

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

Natural, Organic & Eco-Friendly Pet Products: United States (FF10039) is based on [Natural, Organic, and Eco-Friendly Pet Products in the US, 6th Edition](#), a comprehensive industry report published by Packaged Facts in October 2016. The information contained in this report was obtained from primary and secondary research. Primary research includes national online consumer polls of US adult pet owners (age 18+) conducted on an ongoing basis by Packaged Facts, to measure purchasing patterns and attitudes with regard to pet products and services, with the majority of the data coming from the survey conducted in July/August 2016. These figures are based on a national online consumer panel of approximately 2,000 US adults (age 18+) that was balanced to Census data on the primary demographic measures of gender, age bracket, race/ethnicity, geographic region, marital status, presence of children in the household, and household income.

Our primary research also includes interviews with pet market experts; participation in

pet industry events, including the American Pet Products Association's Global Pet Expos (2004-2016) and Petfood Industry/Watt Publishing's Petfood Forums (2004-2016); on-site examination of retail and service provider venues; and internet canvassing, including websites and blogs. Secondary research includes information- and data-gathering from consumer business and trade publications, company profiles in trade and consumer publications, and information culled from Packaged Facts' extensive pet market research database and report collection.

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 (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 and 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.

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		SIC	
North American Industry Classification System		Standard Industry Codes	
311111	Dog and Cat Food Mfg	2047	Dog and Cat Food
453910	Pet and Pet Supplies Stores	5999	Miscellaneous Retail Stores, NEC

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RESOURCES

Packaged Facts

www.packagedfacts.com

Natural, Organic, and Eco-Friendly Pet Products in the US, October 2016 [see report contents](#)

The Freedonia Group

www.freedoniagroup.com

Related Industry Studies

3397 World Flavors & Fragrances, March 2016 [see study contents](#)

3275 World Food Processing Machinery, June 2015 [see study contents](#)

Related Focus Reports

Pet Clean-Up & Odor-Control Products: United States [see report contents](#)

Pet Food: United States [see report contents](#)

Pet Food Packaging: United States [see report contents](#)

Pet Medications: United States [see report contents](#)

Pet Supplies: United States [see report contents](#)

Freedonia Custom Research

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Trade Publications

Consumer Reports

www.consumerreports.org

New Hope Network

www.newhope.com

Pet Age

www.petage.com

Pet Business

www.petbusiness.com

Petfood Industry

www.petfoodindustry.com

Pet Product News

www.petproductnews.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

GfK SE

www.gfk.com

Information Resources

www.iriworldwide.com

International Food Information Council Foundation

www.foodinsight.org

Organic Trade Association

www.ota.com

Simmons National Consumer Survey

www.simmonssurvey.com

Spins LLC

www.spins.com

United States Bureau of Labor Statistics

www.bls.gov

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

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