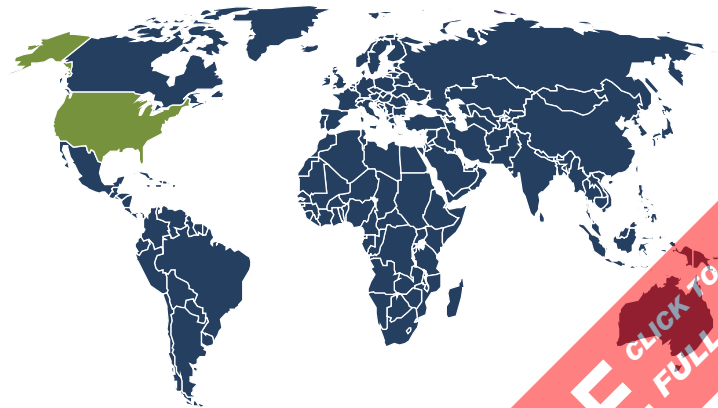




Freedonia Focus Reports  
US Collection

# Pet Supplements: United States

April 2017



## Highlights

### Market Overview

Market Size | Pet Supplement Regulation | Marketing and New Product Trends  
Retail Trends | Consumer Trends

### Industry Structure

Competitive Overview | Marketer and Brand Shares

### Resources

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# Table of Contents

---

<b>1. Highlights</b>	<b>4</b>
<b>2. Market Overview</b>	<b>5</b>
Market Size	5
Pet Supplement Sales Experience Modest Growth in 2016	6
Condition-Specific Pet Supplement Purchasing by Type	7
Mass-Market Pet Supplement Sales by Category	7
Dogs Continue to Drive Pet Supplement Sales	8
Overall Focus on Health, Wellness Impacts Supplement Use	9
Pet Supplement Regulation	10
Marketing & New Product Trends	12
Joint Health, Digestive Health Top Supplement Types	12
Competition from Pet Food & Treats	12
Supplements Address Palatability	12
Condition-Specific Supplements	13
Cat Supplements Offer More than Hairball Relief	13
Natural Supplements in High Demand	14
Lifestage-Specific Supplements	14
Cannabidiol Supplements Generate Interest, Pose Problems	15
Retail Trends	16
Pet Specialty Channel Top Destination for OTC Pet Supplements	16
Pet Specialty Channel Retailers	17
Veterinary Channel Marketers & Trends	17
Mass-Market, Farm & Feed, & Natural Food Channels	18
Online Sales a Growing Channel for Marketers	18
Consumer Trends	20
Note on Data Sources	20
Consumer Sentiments & Buying Habits	20
Dog Owners More Likely to Use Supplements	20
Made in USA, Natural/Organic Key Pet Supplement Purchasing Sentiments	21
Pet Supplement Usage Frequency & Expenditures	21
Pet Supplements Consumer Sentiments	21
Aging, Overweight & Allergy Concerns	21
Demographic Trends	22
Millennials, Homes with Children Skew High for Pet Supplement Use	22
Simmons Demographics for Pet Supplement Use	22

<b>3. Industry Structure</b>	<b>23</b>
Competitive Overview	23
Mergers & Acquisitions	23
Marketer & Brand Shares	24
Mass-Market Activity in Pet Supplements	24
<b>4. About This Report</b>	<b>26</b>
Scope & Method	26
Sources	26
Industry Codes	27
Resources	28

# List of Tables & Figures

---

Figure 1   US Pet Supplement Retail Sales, 2012-2021 (US\$ mil)	5
Table 1   US Pet Supplement Retail Sales, 2012-2021 (US\$ mil)	5
Table 2   US IRI Multi-Outlet Pet Supplement Sales by Category, 52 weeks ending October 30, 2016 (US\$ 000)	8
Figure 2   US Pet Supplement Retail Sales by Animal Type, 2016 (%)	9
Figure 3   US Pet Supplement Retail Sales by Channel, 2016 (%)	16
Table 3   US IRI Multi-Outlet Pet Supplement Sales by Marketer, 52 weeks ending October 30, 2016 (US\$ mil)	25
Table 4   Industry Codes Related to Pet Supplements	27

# About This Report

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## Scope & Method

This report forecasts US pet supplement retail sales in US dollars for 2017-2021. To illustrate historical trends, total sales are provided in an annual series from 2012 to 2016.

This report examines the US market for nutritional supplements for pets: dogs, cats, birds, small mammals, and reptiles, collectively. The term “supplement” as used in this report refers to products sold in traditional supplement forms, including pills, tablets, powders, liquids, and sprays. The focus is on products for dogs and cats, which account for over 95% of the market, although coverage also extends to other types of companion animals. Excluded from the scope of this report are pet foods marketed as complete and balanced diets, including those featuring novel ingredients such as glucosamine; functional treats (supplements in treat format marketed primarily as treats); and supplements for fish, most of which are water treatment products to control algae, fungi, parasites, etc.

This report 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  $r^2$ . The most stable data series relative to the trend carries an  $r^2$  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 Supplements: United States* (FF40071) is based on [Pet Supplements in the US](#), a comprehensive industry report published by Packaged Facts. The information contained in this report was obtained from primary and secondary research. Primary research includes national online consumer polls of US pet owners, conducted on an ongoing basis by Packaged Facts, to measure purchasing patterns and attitudes about pet products and services. Packaged Facts surveys of US adult consumers (age 18+) are based on national online research panels that are census representative on the primary demographic measures of age, gender, geographic region, race/ethnicity, and household income. The December 2016 survey data primarily cited in this report has a sample of 2,244 adults, including a total of 1,743 dog owners and 1,261 cat owners.

## About This Report

Our primary research also includes interviews with pet market experts, including Bill Bookout, President of the National Animal Supplement Council; on-site examinations 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 marketer and brand rankings are based on reported revenues of pet product manufacturers and retailers; consultations with industry insiders; Information Resources' (IRI) InfoScan Reviews data, which tracks sales in supermarkets, drugstores, and mass merchandisers; surveys of independent and chain pet store retailers; and figures from other market research sources.

Our analysis of pet supplement usage trends relies on Packaged Facts' proprietary pet owner surveys and on consumer survey data compiled by Simmons National Consumer Survey (Simmons). Conducted through a combination of telephone interviews and mail-in survey booklets, the Simmons surveys rely on a probability sample design that captures a statistically accurate cross-section of the US adult population (age 18+). The 12-Month Summer 2016 survey primarily cited in this report is based on approximately 25,000 respondents, including 13,767 dog- or cat-owning households overall, comprising 10,980 dog-owning households and 5,944 cat-owning households.

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

## Industry Codes

Table 4 | Industry Codes Related to Pet Supplements

NAICS/SCIAN 2007		SIC	
North American Industry Classification System		Standard Industry Codes	
325411	Medicinal and Botanical Mfg	0742	Veterinary Services for Animal Specialties
325412	Pharmaceutical Preparation Mfg	2833	Medicinal Chemicals and Botanical Products
541940	Veterinary Services	2834	Pharmaceutical Preparations

Source: US Census Bureau

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## Resources

### Packaged Facts

*Pet Supplements in the US*, April 2017

### The Freedonia Group

#### Freedonia Industry Studies

*Alternative Sweeteners Market in the US*, February 2017

*Retail E-Commerce Packaging Market in the US*, November 2016

*Natural Flavors & Fragrances*, October 2016

*Retail Ready Packaging*, July 2016

*World Flavors & Fragrances*, March 2016

#### Freedonia Focus Reports

*Alternative Sweeteners: United States*

*Durable Petcare Products: United States*

*E-Commerce: United States*

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

*Nutritional Supplements: United States*

*Pet Clean-Up & Odor-Control Products: United States*

*Pet Food: United States*

*Pet Medications: United States*

*Pet Supplies: United States*

*Pharmaceuticals: United States*

*World Clinical Nutrition Products*

#### Freedonia Custom Research

### Trade Publications

*Pet Age*

*Pet Business*

*Petfood Industry*

*Pet Product News International*

*Veterinary Practice News*

### Agencies & Associations

American Pet Products Association

American Veterinary Medical Association

Association of American Feed Control Officials

Information Resources

National Animal Supplement Council

## About This Report

Simmons National Consumer Survey  
United States Census Bureau  
United States Food and Drug Administration  
United States International Trade Commission  
World Pet Association