



Freedonia Focus Reports
US Collection

Pet Oral Care: United States

July 2018



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About This Report

Scope

This report forecasts US pet oral care retail sales in US dollars to 2022. Total sales are segmented by type in terms of:

- services
- products

To illustrate historical trends, total sales are provided for 2012 and 2017. In addition, pet oral care service retail sales for 2017 are segmented by animal type in terms of dogs and cats. Pet oral care product retail sales for 2017 are segmented by animal type in terms of dogs and cats; product type, in terms of treats and chews, food, and non-edible products; and channel, in terms of pet specialty chains, mass merchandisers, online, veterinary, grocery, independent pet, and other.

This report examines the US market for oral care services and products for dogs and cats. The report focuses on products whose primary market positioning is oral care or dental health, such as teeth cleaning, gum massage, and breath freshening, including biscuits/treats, food, chew toys, toothbrushes and toothpaste, and breath supplements.

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

Industry Codes

Table 4 | NAICS & SIC Codes Related to Pet Oral Care

NAICS/SCIAN 2007		SIC	
North American Industry Classification System		Standard Industrial Classification	
311111	Dog and Cat Food Mfg	0742	Veterinary Services for Animal Specialties
424490	Other Grocery and Related Products Merchant Wholesalers	2047	Dog and Cat Food
424990	Other Miscellaneous Nondurable Goods Merchant Wholesalers	5149	Groceries and Related Products, NEC
453910	Pet and Pet Supplies Stores	5199	Nondurable Goods, NEC
541940	Veterinary Services	5999	Miscellaneous Retail Stores, NEC

Source: US Census Bureau

Methodology & Sources

Pet Oral Care: United States (FF40081) is based on *Pet Oral Care Services and Products in the U.S.*, a comprehensive industry study published by Packaged Facts. The information contained in this report was obtained from both primary and secondary research. Primary research includes national online consumer surveys of US adults (age 18+) that we conduct

About This Report

on a regular basis to measure consumer purchasing patterns and attitudes for various products and services. These proprietary Packaged Facts surveys have a sample size of approximately 2,000, screened for response quality, and representative of the US population on the demographic measures of age, gender, geographic region, race/ethnicity, household income, and the presence/absence of children in the household.

Our consumer analysis also draws on national consumer survey data licensed by Simmons Research. On a quarterly basis, Simmons releases 12-month aggregations of booklet-based survey results from a large and random sample (approximately 25,000 for each quarterly release) that accurately represents the US population. This database allows for historical trending and detailed consumer profiles across various demographic and psychographic measures as well as product and service categories.

The analysis in this report also draws, as a background source, on retail sales tracking data as available from Information Resources (IRI) and Nielsen (for mass-market channels) and SPINS (for the natural channel).

Primary research also includes participation at industry events including Global Pet Expos, presented by the American Pet Products Association and Pet Industry Distributors Association through 2018; on-site examinations of retail outlets, such as the pet specialty channel, mass-market outlets, and veterinary clinics; and interviews with industry experts. Secondary research includes extensive examination of pet oral care marketers' internet presence via websites and social media; information- and data-gathering from relevant government, consumer business, and trade publications; company reports including annual reports, 10Ks, and other financial releases from public companies; company profiles in trade and consumer publications; and information culled from Packaged Facts' extensive pet market research database and report collection.

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

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.

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Resources

Packaged Facts

Pet Oral Care Services and Products in the U.S., July 2018

The Freedonia Group

Freedonia Industry Studies

Natural Alternative Sweeteners Market in the US, July 2017

Alternative Sweeteners Market in the US, February 2017

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

Natural Flavors & Fragrances, October 2016

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