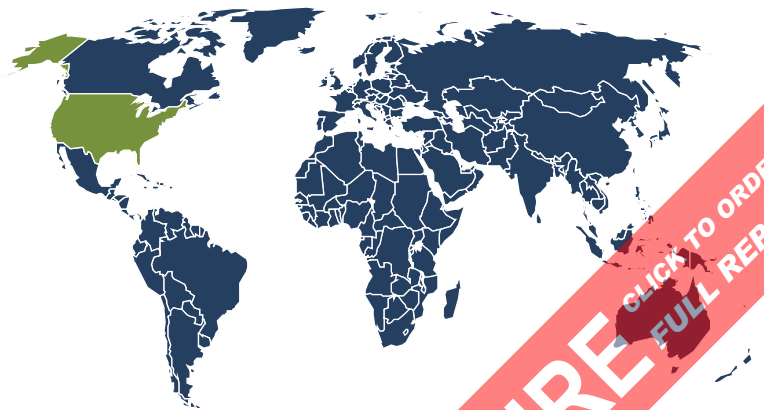




Freedonia Focus Reports
US Collection

Pet Supplies: United States

September 2015



Highlights

Market Overview

Market Trends | Competitive Trends | Marketing and Product Trends | Retail Trends
Consumer Trends

Companies Cited

Resources

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ABOUT THIS REPORT

Scope & Method

This report forecasts annual US retail sales of pet supplies in US dollars for 2015-2019. To illustrate historical trends, total retail sales are provided in an annual series from 2010 to 2014.

While the pet supply market includes certain edibles that straddle the line between food and toys or healthcare products – such as treat-filled chews – pet food and treats are excluded from the scope of this report. Similarly, while over-the-counter medications and supplements are included, prescription medications and other prescription healthcare products are excluded.

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 Supplies: United States (FF90045) is based on [Pet Supplies in the US](#), a comprehensive industry report published by Packaged Facts in September 2015. 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 a sample size of approximately 2,000, these surveys 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.

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 (through 2015) and other meetings and forums relevant to the pet products industry. Packaged Facts also completed on-site examination of retail and service provider venues, as well as Internet presence of pet product manufacturers, distributors, and retailers. 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 and retailers; Information Resource's (IRI) multi-outlet (MULO) data, which tracks sales in supermarkets, drugstores, mass merchandisers (including Walmart), and wholesale clubs; 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 retail channel trends and pet product usage trends relies on Packaged Facts proprietary pet owner surveys and on cross-tabulations of consumer survey data compiled by Experian Marketing Services in its Simmons National Consumer Studies. On an ongoing basis, Experian Marketing Services conducts booklet-based surveys of a large and random sample of consumers who in aggregate represent a statistically accurate cross-section of the US population.

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	0752	Animal Specialty Services, Except Veterinary
311119	Other Animal Food Mfg		
424990	Other Miscellaneous Nondurable Goods Merchant Wholesalers	2047	Dog and Cat Food
		2048	Prepared Feed and Feed Ingredients for Animals and Fowls, Except Dogs and Cats
453910	Pet and Pet Supplies Stores		
812910	Pet Care (except Veterinary) Services	5149	Groceries and Related Products, NEC
		5199	Nondurable Goods, NEC
		5999	Miscellaneous Retail Stores, NEC

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RESOURCES

Packaged Facts

Pet Supplies in the US, September 2015

www.packagedfacts.com

[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](#)

Freedonia Custom Research

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Trade Publications

Pet Age

www.petage.com

Pet Business

www.petbusiness.com

Petfood Industry

www.petfoodindustry.com

Pet Product News

www.petproductnews.com

Progressive Grocer

www.progressivegrocer.com

Supermarket News

<http://supermarketnews.com>

Veterinary Practice News

www.veterinarypracticenews.com

Agencies & Associations

American Kennel Club

www.akc.org

American Pet Products Association

www.americanpetproducts.org

American Veterinary Medical Association

www.avma.org

Bureau of Labor Statistics – Consumer Expenditure Survey

www.bls.gov/cex

Experian Marketing Services

www.experian.com

Information Resources

www.iriworldwide.com

Pet Industry Distributors Association

www.pida.org

Pet Industry Joint Advisory Council

<http://pijac.org>

Simmons National Consumer Survey

www.simmonssurvey.com

United States Census Bureau

www.census.gov

United States Food and Drug Administration

www.fda.gov

Animal & Veterinary

www.fda.gov/AnimalVeterinary

United States International Trade Commission

www.usitc.gov

World Pet Association

www.worldpetassociation.org

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