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US Collection

Durable Pet Care Products: United States

May 2022



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About This Report

Scope

This report forecasts for 2022-2026 total US retail sales of durable pet care products (also referred to as pet durables) in nominal US dollars for dogs and cats. To illustrate historical trends, total retail sales and the various segments are provided for 2016 to 2021. Total retail sales are segmented by type in terms of:

- toys
- collars, leashes, and harnesses
- beds
- carriers, crates, and housing
- bowls, feeders, and waterers
- apparel and fashion accessories
- litter boxes and accessories

Sales estimates and trend coverage span the full retail spectrum, including:

- mass-market outlets (supercenters/mass merchandisers, supermarkets, warehouse clubs, drugstores, dollar stores)
- pet specialty stores (independents and chains)
- other outlets such as farm/feed stores, home goods retailers, and home improvement/hardware stores

The report also covers all online sales, both through pure play internet retailers such as Chewy.com and Amazon.com and through the websites of brick-and-mortar retailers.

Durable pet care items for other animal types – including fish, small animals, reptiles, and birds – are excluded from this report but are discussed in more detail in Packaged Facts' report [Fish, Small Mammal, Herptile, & Bird Products: U.S. Pet Market Trends and Opportunities](#).

Freedonia 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

Durable Pet Care Products: United States (FF90050) is based on *Durable Dog and Cat Pet Care Products in the U.S.*, a comprehensive industry study published by Packaged Facts. The information contained in that report was obtained from primary and secondary research. Primary research included 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 regarding pet products and services. With sample sizes of approximately 2,000 pet owners, 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.

Consumer analysis drew mainly on two sources:

- Packaged Facts' Surveys of Pet Owners, primarily the ones conducted in January 2022 and February 2022. These surveys have a sample of 2,000 US respondents age 18 or over who in aggregate are representative of the primary demographic measures of the US Census Bureau including gender, age bracket, race/ethnicity, geographic region, household income bracket, and presence of children in the household. The survey sample included 986 dog owners and 704 cat owners.
- MRI-Simmons booklet-based consumer surveys of a large and random sample of approximately 25,000 consumers through Fall 2021, who in aggregate represent a statistically accurate cross-section of the US population. Note that MRI-Simmons releases correspond to an approximately 12-month roll-up of survey fielding ending in the quarter indicated; the respondents and results for adjacent surveys are therefore partially overlapping, rather than mutually exclusive.

Primary research also included interviews with pet market experts and participation in pet industry events, including the American Pet Products Association's Global Pet Expos, Petfood Industry/Watt Publishing's Petfood Forums, the Pet Industry Joint Advisory Council's Pet Industry Leadership Summit, and the North American Veterinary Community (NAVC) VMX Veterinary Conferences and Media E-Commerce Summits. The analysis also reflected on-site examination of retail and service provider venues and internet canvassing.

Secondary research included information- and data-gathering from consumer business and trade publications, company profiles in trade and consumer publications, annual reports of companies in the pet market, and information culled from Packaged Facts' extensive pet market research database and report collection. Estimates of market size and company performance were based on reported revenues of pet product manufacturers, retailers, and pet services providers; background sales data from syndicated sales-tracking sources; 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.

Consumer analysis also drew on national consumer survey data from the American Pet Products Association's (APPA) 2021-2022 National Pet Owners Survey. Published every other year, the APPA survey for 2021-2022, conducted by The Engine Group, included 9,206 completed pet owner surveys in the tabulations.

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 | NAICS & SIC Codes Related to Durable Pet Care Products

NAICS/SCIAN 2017		SIC	
North American Industry Classification System		Standard Industrial Classification	
311111	Dog and Cat Food Mfg	0752	Animal Specialty Services, Except Veterinary
424990	Other Miscellaneous Nondurable Goods Merchant Wholesalers	2047	Dog and Cat Food
453910	Pet and Pet Supplies Stores	5149	Groceries and Related Products, NEC
812910	Pet Care (except Veterinary) Services	5199	Nondurable Goods, NEC
		5999	Miscellaneous Retail Stores, NEC

Source: US Census Bureau

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Resources

Packaged Facts

Durable Dog and Cat Pet Care Products in the U.S.

Pet Food in the U.S.

Pet Litter, Cleanup, and Odor-Control Products: U.S. Market Trends

Pet Medications in the U.S.

Pet Population and Ownership Trends in the U.S.: Dogs, Cats, and Other Pets

Pet Supplements in the U.S.

Pet Treats and Chews in the U.S.

U.S. Pet Market Outlook, 2022-2023

Veterinary Services in the U.S.: Competing for the Pet Care Customer

The Freedonia Group

Freedonia Industry Studies

Cannabis Growing Market

Converted Flexible Packaging

Global E-Commerce

Global E-Commerce Packaging

Global Housing

Nonwovens

Retail Bags

Retail-Ready Packaging

Freedonia Focus Reports

Cannabis Production: United States

COVID-19 Market Impact Analysis

Demographics: United States

E-Commerce: United States

Pet Cleanup & Odor-Control Products: United States

Pet Products & Services: United States

Pet Supplements: United States

Pet Treats & Chews: United States

Freedonia Custom Research

Trade Publications

Pet Age

Pet Business

Petfood Industry

Pet Product News International

Veterinary Practice News

Agencies & Associations

American Kennel Club

American Pet Products Association

American Veterinary Medical Association

North American Veterinary Community

Pet Advocacy Network

Pet Industry Distributors Association

United States Bureau of Labor Statistics

United States Census Bureau

United States International Trade Commission

World Pet Association