



Freedonia Focus Reports
US Collection

Pet Treats & Chews: United States

August 2017



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About This Report

Scope & Method

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

The primary focus of this report is on products for dogs and cats, but to provide perspective on overarching market trends coverage also extends to other types of companion animals including birds, small mammals, and reptiles. Throughout the report, Packaged Facts refers to the overall market as “treats” or “treats and chews”. Excluded from the scope of this report are pet foods marketed as complete and balanced diets, products marketed primarily as nutritional supplements, and rope chews and rubber chew toys.

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 Treats & Chews: United States (FF90051) is based on *Pet Treats & Chews 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 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.

Packaged Facts’ primary research also includes interviews with pet market experts; participation in and attendance at pet industry events including the American Pet Products Association’s Global Pet Expos (2004-2017) and Petfood Industry/Watt Global Media’s

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Petfood Forums (2004-2017); on-site examination of retail and service provider venues; and internet canvassing, including 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.

Packaged Facts' estimates of market size and company performance are based on reported revenues of pet product manufacturers, retailers, and pet services providers; information from industry insiders; 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. A portion of our pet ownership trend analysis relies on cross-tabulations of data from the Simmons Winter 2017 survey, compiled by Simmons Research between January 2016 and March 2017. On an ongoing basis, Simmons conducts booklet-based surveys of a large and random sample of consumers (approximately 25,000 for each 12-month survey compilation) 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

Table 5 | Industry Codes Related to Pet Treats & Chews

NAICS/SCIAN 2007		SIC	
North American Industry Classification System		Standard Industry Codes	
311111	Dog and Cat Food Mfg	2047	Dog and Cat Food
311119	Other Animal Food Mfg	2048	Prepared Feed and Feed Ingredients for Animals and Fowls, except Dogs and Cats
424990	Other Miscellaneous Nondurable Goods Merchant Wholesalers	5149	Groceries and Related Products, NEC
453910	Pet and Pet Supplies Stores	5199	Nondurable Goods, NEC
		5999	Miscellaneous Retail Stores, NEC

Source: US Census Bureau

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Resources

Packaged Facts

Pet Treats & Chews in the US, August 2017

The Freedonia Group

Freedonia Industry Studies

Food & Beverage Natural Colors Market in the US, July 2017

Natural Alternative Sweeteners Market in the US, July 2017

Food & Beverage Hydrocolloids Market in the US, May 2017

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

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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 Products & Services: United States

Pet Supplements: United States

Pet Supplies: United States

World Clinical Nutrition Products

Freedonia Custom Research

Trade Publications

Pet Age

Pet Business

Petfood Industry

Pet Product News International

Agencies & Associations

American Pet Products Association

American Veterinary Medical Association

About This Report

Association of American Feed Control Officials
Bureau of Labor Statistics – Consumer Expenditure Survey
National Animal Supplement Council
Private Label Manufacturers Association
Simmons National Consumer Survey
SPINS
United States Census Bureau
United States Department of Agriculture
United States Food and Drug Administration
United States International Trade Commission
World Pet Association