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# Pet Treats & Chews: United States

September 2019



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# About This Report

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## Scope

This report forecasts US pet treat and chew retail sales in nominal US dollars for 2019-2023. To illustrate historical trends, total retail sales are provided in annual series from 2014-2018.

This Packaged Facts report examines the US market for pet treats and chews, with a focus on products for dogs and cats. Products include indulgent treats, rawhide and other edible chews, functional treats, and dental treats and chews. Throughout the report, the overall market is referred to as “treats” or “treats and chews”.

Specifically excluded are:

- pet foods marketed as complete and balanced diets, covered in the Packaged Facts report [Pet Food in the U.S.](#)
- products marketed primarily as nutritional supplements, covered in the Packaged Facts report [Pet Supplements in the U.S.](#)
- rope chews and rubber chew toys, covered in the Packaged Facts report [Durable Dog and Cat Petcare Products in the U.S.](#)

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

*Pet Treats & Chews: United States* (FF90051) is based on [Pet Treats and Chews 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 entailed informal interviews with pet industry experts, attendance of the Global Pet Expo and Petfood Forum trade events from 2005 through 2019, consultations with pet product manufacturers and members of the trade, and an on-site examination of retail venues. Secondary research included extensive internet canvassing and research- and data-

## About This Report

gathering from relevant consumer business and trade publications; company reports including annual reports, press releases, and investor conference calls; company profiles in trade and consumer publications; government reports; and other pet market reports by Packaged Facts. Sales estimates were based on published and estimated sales of major market participants, market size estimates from other sources appearing in the trade press, figures obtained through consultation with pet market participants, the performance of relevant retail venues, consumer usage rates for pet treats, rates of company and product entries into the market, and sales data from syndicated resources.

Our consumer analysis draws mainly on two sources:

- Packaged Facts Pet Owner Surveys, primarily the one conducted in July/August 2019. 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 gender, age bracket, race/ethnicity, geographic region, household income bracket, and presence of children in the household of the US Census Bureau. The survey sample included 1,007 dog owners and 737 cat owners.
- MRI-Simmons Spring 2019 booklet-based consumer survey of a large and random sample of approximately 25,000 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

Table 7 | NAICS & SIC Codes Related to Pet Treats & Chews

NAICS/SCIAN 2017		SIC	
North American Industry Classification System		Standard Industrial Classification	
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 Industry Outlook: Veterinary Services and Pet Product Retailing  
Pet Treats and Chews in the U.S.  
U.S. Pet Market Focus: New Dog and Cat Owners  
U.S. Pet Market Focus: Pet Specialty Channel and Internet Shoppers  
U.S. Pet Market Outlook, 2019-2020*

### The Freedonia Group

#### Freedonia Industry Studies

*Cannabis Growing Market  
Converted Flexible Packaging  
Food Safety Products in the US  
Global E-Commerce  
Global E-Commerce Packaging  
Global Food Processing Machinery  
Global Housing  
Pouches in the US  
Pressure Sensitive Tapes in the US  
Retail E-Commerce Packaging Market in the US  
Retail-Ready Packaging*

#### Freedonia Focus Reports

*Cannabis Production: United States  
Demographics: United States  
E-Commerce: United States  
Equine Products & Services: United States  
Pet Food: United States  
Pet Insurance: United States  
Pet Medications: United States  
Pet Oral Care: United States  
Pet Products & Services: United States  
Pet Supplements: United States*

#### 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

Association of American Feed Control Officials

National Animal Supplement Council

Private Label Manufacturers Association

United States Census Bureau

United States Department of Agriculture

United States Food and Drug Administration

United States International Trade Commission

World Pet Association