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# Pet Products & Services: United States

May 2017



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# About This Report

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## Scope & Method

This report forecasts US pet product and service retail sales in US dollars for 2017-2021. Total retail sales are segmented by category in terms of:

- retail channel pet food
- veterinary services
- retail channel pet supplies
- non-medical pet services.

To illustrate historical trends, total retail sales and the various segments are provided in annual series from 2012 to 2016.

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 Products & Services: United States* (FF95047) is based on *US Pet Market Outlook*, 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.

Our 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 Publishing's Petfood Forums (2004-2017); on-site examination of retail and service provider venues; and internet

## About This Report

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.

Our estimates of market size and company performance are based on reported revenues of pet product manufacturers, retailers, and pet services providers; scanner data from syndicated sources for mass-market and pet specialty channels; SPINSscan Natural data from Spins, which tracks sales in the natural supermarket channel and in the specialty gourmet supermarket channel; 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 pet ownership trends primarily relies on cross-tabulations of data compiled by Simmons, New York, NY. On an ongoing basis, Simmons Market Research 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 8 | Industry Codes Related to the Pet Product & Service Market

| NAICS/SCIAN 2007                              |   | SIC                     |  |
|---|---|-------------------------|--|
| North American Industry Classification System |   | Standard Industry Codes |  |
| 311111  | Dog and Cat Food Mfg                                      | 0742                    | Veterinary Services for Animal Specialties                                     |
| 311119  | Other Animal 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                               | 2048                    | Prepared Feed and Feed Ingredients for Animals and Fowls, except Dogs and Cats |
| 541940  | Veterinary Services                                       | 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

*US Pet Market Outlook*, May 2017

### The Freedonia Group

#### Freedonia Industry Studies

*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

#### Freedonia Focus Reports

*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 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*

*Veterinary Practice News*

### Agencies & Associations

American Pet Products Association

American Veterinary Medical Association

Association of American Feed Control Officials

Bureau of Labor Statistics – Consumer Expenditure Survey

National Animal Supplement Council

## About This Report

Simmons National Consumer Survey

Spins

United States Census Bureau

United States Food and Drug Administration

United States International Trade Commission

World Pet Association