



Freedonia Focus Reports
US Collection

Pet Grooming Products: United States

April 2018



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About This Report

Scope

This report forecasts to 2021 US pet grooming product retail sales in nominal US dollars. To illustrate historical trends, total retail sales are provided for 2013 and 2017.

Other data covered in this report include:

- US retail sales of pet grooming products by channel in 2017
- US retail sales of pet grooming products in the natural and specialty gourmet channels, 2016 versus 2017
- US purchase rates for non-electric grooming products in the past 12 months by percentage of pet owners, 2018
- US purchase rates for electric grooming products in the past 12 months by percentage of pet owners, 2018
- US ownership levels of key durable dog grooming supplies by percentage of dog owners, 2006-2016
- US ownership levels of key durable cat grooming supplies by percentage of cat owners, 2006-2016

The primary animal types covered are dogs and cats. For the sake of brevity, this report refers to the combination of pet grooming and spa products as “pet grooming products”.

Except to provide a context for general market trends, this report does not cover anti-parasitics (products intended to treat fleas, ticks, and other pests), nor does it cover medicated prescription or over-the-counter products treating skin allergies or conditions, both of which are covered in Packaged Facts’ *Pet Medications in the U.S.* This report also does not include sales of grooming and spa products to grooming professionals, although it does examine trends in professional products that have crossed into the consumer market.

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 Grooming Products: United States (FF95069) is based on *Pet Grooming, Skin & Coat, and Spa Products and Services 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 surveys of US adults (age 18+) that Packaged Facts conducts on a regular basis to measure consumer purchasing patterns and attitudes for various products and services. These proprietary Packaged Facts surveys have a sample size of approximately 2,000, screened for response quality, and representative of the US population on the demographic measures of age, gender, geographic region, race/ethnicity, household income, and the presence/absence of children in the household.

Consumer analysis also drew on national consumer survey data licensed by Simmons Research. On a quarterly basis, Simmons releases 12-month aggregations of booklet-based survey results from a large and random sample (approximately 25,000 for each quarterly release) that accurately represents the US population. This database allows for historical trending and detailed consumer profiles across various demographic and psychographic measures as well as product and service categories.

The analysis in that report also drew, as a background source, on retail sales tracking data as available from IRI and Nielsen (for mass-market channels) and SPINS (for the natural channel).

Primary research also included interviews with pet market experts; participation in pet industry events including the American Pet Products Association's Global Pet Expos (through 2018), and other meetings and forums relevant to the pet products industry. Packaged Facts also conducted on-site examination of retail and service provider venues and extensive internet canvassing of the activity of pet product manufacturers, distributors, and retailers. Secondary research included 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.

Estimates of market size and company performance were based on reported revenues of pet product manufacturers and retailers, information from industry experts, 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.

Analysis of retail channel trends, pet product usage, and other consumer trends relied on the Packaged Facts proprietary pet owner surveys noted above and on cross-tabulations of consumer survey data compiled by Simmons. Consumer trend analysis also took into account data from the American Pet Product Association's biennial *National Pet Owner Surveys*.

About This Report

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 | NAICS & SIC Codes Related to Pet Grooming Products

NAICS/SCIAN 2007		SIC	
North American Industry Classification System		Standard Industrial Classification	
424990	Other Miscellaneous Nondurable Goods Merchant Wholesalers	5149	Groceries and Related Products, NEC
445110	Supermarkets and Other Grocery (except Convenience) Stores	5199	Nondurable Goods, NEC
453910	Pet and Pet Supplies Stores	5411	Grocery Stores
454111	Electronic Shopping	5961	Catalog and Mail-Order Houses
		5999	Miscellaneous Retail Stores, NEC

Source: US Census Bureau

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Resources

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Pet Grooming, Skin & Coat, and Spa Products and Services in the U.S.

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Trade Publications

Pet Age

Pet Business

Pet Product News International

Veterinary Practice News

Agencies & Associations

American Kennel Club

American Pet Products Association

National Dog Groomers Association

United States Bureau of Labor Statistics

United States Food and Drug Administration

World Pet Association