

## Pet Supplies - US - August 2016

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"The pet supplies category continues its steady growth trajectory as Americans continue to spoil their pets, which are viewed as loyal family members rather than owned animals. Looking ahead, the category is expected to grow as the pet population ages, creating opportunities for products designed to address common issues that arise among older pets."

Rebecca Cullen, Associate Analyst

### This report looks at the following areas:

- Category grows 18% from 2011-16
- Pet ownership nearly universal
- Pet owners mostly purchase the essentials

#### Definition

For the purposes of this Report, Mintel has used the following definitions:

- Supplies for household pets including cats, dogs, small animals (hamsters, etc.), reptiles, fish, and birds; horse care items are not included.
- Supplies include, but are not limited to, litter/deodorant, rawhide dog chews, dog/cat supplies (ie grooming, collars, leashes, toys, bedding, feeding equipment, and over-the-counter flea and tick treatments), and non-dog/cat supplies (ie indoor aquariums and aquarium accessories, bird cages).

#### Excluded

from this report are services for pets, such as boarding, grooming, training, and veterinary services; pet food; over-the-counter and prescription medicines; and the actual cost of the animal. Pet supplies sold through non-retail channels, such as groomers and veterinary offices are not included in the market size estimates.

**BUY THIS  
REPORT NOW**

**VISIT:**  
[store.mintel.com](http://store.mintel.com)

**CALL:**  
EMEA  
+44 (0) 20 7606 4533

Brazil  
0800 095 9094

Americas  
+1 (312) 943 5250

China  
+86 (21) 6032 7300

APAC  
+61 (0) 2 8284 8100

**EMAIL:**  
[reports@mintel.com](mailto:reports@mintel.com)

#### DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

# Pet Supplies - US - August 2016

**Report Price:** £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Table of Contents

### Overview

What you need to know

Definition

### Executive Summary

The issues

Category grows 18% from 2011-16

Figure 1: Total US sales and fan chart forecast of pet supplies, at current prices, 2011-21

Pet ownership nearly universal

Figure 2: Type of pet owned, June 2016

Pet owners mostly purchase the essentials

Figure 3: Select pet supplies and health/grooming supplies purchased, June 2016

The opportunities

Health, functionality important purchase drivers

Figure 4: Purchase factors, June 2016

Young adults, Hispanics, parents express most interest in category innovations

Figure 5: Interest in select innovations, any interest, by age (18-44), Hispanic origin, and parental status, June 2016

Emphasize importance of proper care of aging pets, proactive measures

Figure 6: Attitudes toward aging pets, June 2016

What it means

### The Market – What You Need to Know

Sales reach \$11 billion in 2016

Non-dog/cat needs segment struggles

US pet population in their elder years

Growth in US population, declining homeownership rates impact market

Analysis of America's pets

### Market Size and Forecast

Category sales reach \$11 billion in 2016

Figure 7: Total US sales and fan chart forecast of pet supplies, at current prices, 2011-21

Figure 8: Total US retail sales and forecast of pet supplies, at current prices, 2011-21

Figure 9: Total US retail sales and forecast of pet supplies, at inflation-adjusted prices, 2011-21

### Market Breakdown

Cat litter and other dog/cat supplies grow, non-dog/cat needs struggle

Figure 10: Share of total US retail sales of pet supplies, by segment, 2016

Figure 11: Total US retail sales of pet supplies, by segment, at current prices, 2014 and 2016

Other retailers garner sales from supermarkets

Figure 12: Total US retail sales of pet supplies, by channel, at current prices, 2011-16

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

# Pet Supplies - US - August 2016

**Report Price:** £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Market Perspective

US pet population aging

## Market Factors

Growth in US population to benefit pet supplies market

Figure 13: US population, by age, 2011, 2016, and 2021

Unmarried adults, delay in starting family on the rise

Figure 14: Households, by presence of own children, 2003-13

Declining homeownership rates, income impact market

Figure 15: Type of pet owned, by household income and primary residence, June 2016

Consumer confidence, economic improvements

Figure 16: Consumer Sentiment Index, January 2007-June 2016

Profile of Americas pets

Americas cat population

Figure 17: Profile of cat ownership, June 2016

Americas dog population

Figure 18: Profile of dog ownership, June 2016

## Key Players – What You Need to Know

Sales fragmented, private label represents nearly one quarter of sales

Innovation, functionality boosts cat litter segment growth

Specialty, private labels threaten mass brands

Health, technology, and smaller products bring new opportunities

## Manufacturer Sales of Pet Supplies

Nestle is leading MULO pet supply company

Private label represents nearly one quarter of category sales

Manufacturer sales of pet supplies

Figure 19: MULO sales of pet supplies, by leading companies, rolling 52-weeks 2015 and 2016

## What's Working?

Sustained cat litter innovation aids segment growth

Figure 20: Purina Tidy Cat Tidy Innovation Lab, April 6, 2015

Figure 21: MULO sales of Purina Tidy cat litter

Figure 22: MULO sales of Arm & Hammer Clump and Seal litter

Figure 23: Cats Pride Fresh and Light Ultimate Care line commercial, March 2016

Treatment and prevention

Figure 24: MULO sales of select pet needs, by leading companies and brands, rolling 52-weeks 2015 and 2016

Brands focus on well-rounded approach for pet's happiness

Campaigns highlight proper care for companions

Figure 25: Petco 7-point pet care check online ad, 2016

Figure 26: Petco "Finding Dory" online ad, 2016

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

# Pet Supplies - US - August 2016

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## What's Struggling?

Brand name products face competition from specialty and private labels

Figure 27: Location of pet food purchases, June 2016

Health risks, basic flavor temper rawhide chew segment growth

Non-dog/cat products struggle in market

Figure 28: MULO sales of non –dog/cat needs, by leading companies and brands, rolling 52-weeks 2015 and 2016

## What's Next?

Pets are joining the #foodie movement

Subscription services deliver age-related products

Pets and the city – Products for urban dwelling pets

Litter goes outside the box – Colors, scents, and health

Figure 29: Neon Litter Clumping Crystals Cat Litter

Pet tech – Pets get smart

Fitness and fun

Safety and monitoring

Vet at your finger tips

## The Consumer – What You Need to Know

Dogs the most popular pet in America

Dog owners purchase more house, travel, and apparel pet supplies

Flea and tick treatment, litter most purchased health supplies

Health and functionality top list of purchase factors

Improving health and user experience holds most interest for owners

Attitudes toward aging vary based on pets life stage

## Type of Pet Owned

Dog favored pet in US

Figure 30: Type of pet owned, June 2016

Pet ownership drops off with age

Figure 31: Type of pet owned, by age and gender, June 2016

Pet ownership skews toward parents, Hispanics

Figure 32: Type of pet owned, by parental status and number of children under 18 in household, June 2016

Figure 33: Type of pet owned, by Hispanic origin, June 2016

## House, Travel, and Apparel Pet Supplies Purchased

Toys and treats most purchased, especially among dog owners

Figure 34: House, travel, and apparel pet supplies purchased, June 2016

Figure 35: House, travel, and apparel pet supplies purchased, by type of pet owned, June 2016

Spending peaks among Millennials

Figure 36: PetSmart online ad, 2016

Figure 37: Select house, travel, and apparel pet supplies purchased, by generation, June 2016

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

# Pet Supplies - US - August 2016

**Report Price:** £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Hispanics more likely to buy pet supplies geared toward younger pets

Figure 38: Select house, travel, and apparel pet supplies purchased, by Hispanic origin, June 2016

Urbanites pamper pets

Figure 39: Select house, travel, and apparel pet supplies purchased, by area, June 2016

## Health and Grooming Pet Supplies Purchased

Litter, flea and tick products most purchased

Figure 40: Health and grooming pet supplies purchased, June 2016

Dog owners more likely to purchase most health and grooming items

Figure 41: Health and grooming pet supplies purchased, by type of pet owned, June 2016

Training, improving pets health top of mind for Millennials

Figure 42: Select health and grooming pet supplies purchased, by generation, June 2016

Hispanics want pets healthy from head to tail

Figure 43: Select health and grooming pet supplies purchased, by Hispanic origin, June 2016

Parents concerned about health and safety

Figure 44: Select health and grooming products, by parental status, June 2016

## Purchase Factors

Health, functionality top list of purchase factors

Figure 45: Purchase Factors, June 2016

Millennials seek convenience and design, Boomers trust professionals

Figure 46: Select purchase factors, by generation, June 2016

Nutrition, design appeals to Hispanics

Figure 47: Select purchase factors, by Hispanic origin, June 2016

Urban dwellers look for portability and are fashion forward

Figure 48: Select purchase factors, by area, June 2016

## Interest in Innovations

Product innovations could boost slow market sales

Figure 49: Interest in innovations, June 2016

Adults aged 18-44 represent growth opportunity

Figure 50: Interest in innovations, any interest, by age, June 2016

Hispanics express interest in improving health, odor control

Figure 51: Interest in select innovations, any interest, by Hispanic origin, June 2016

Technology, health, convenience appeal to parents

Figure 52: Interest in select innovations, any interest, by parental status, June 2016

## Attitudes toward Aging Pets

Age-related concerns top of mind for pet owners

Figure 53: Attitudes toward aging pets, June 2016

Dog owners' attitudes vary based on pet's age

Figure 54: Attitudes toward aging pets, by age of dog owned, June 2016

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

# Pet Supplies - US - August 2016

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Income limits proper pet care

Figure 55: Select attitudes toward aging pets, by household income, June 2016

## Millennials preparing for aging pets

Figure 56: Select attitudes toward aging pets, by generation, June 2016

## Appendix – Data Sources and Abbreviations

Data sources

Sales data

Fan chart forecast

Consumer survey data

Abbreviations and terms

Abbreviations

## Appendix – Market

### Market factors

Figure 57: Homeownership rate, by age of householder, 2014

Figure 58: Disposable Personal Income change from previous period, January 2007-May 2016

### Market breakdown

Figure 59: Total US retail sales and forecast of pet supplies, at inflation-adjusted prices, 2011-21

Figure 60: Total US retail sales and forecast of pet supplies, by segment, at current prices, 2011-21

Figure 61: Total US retail sales of pet supplies, by segment, at current prices, 2014 and 2016

Figure 62: Total US retail sales and forecast of litter & deodorant, at current prices, 2011-21

Figure 63: Total US retail sales and forecast of rawhide dog chews, at current prices, 2011-21

Figure 64: Total US retail sales and forecast of non-dog/cat supplies, at current prices, 2011-21

Figure 65: Total US retail sales and forecast of other dog/cat supplies, at current prices, 2011-21

### Retail channels

Figure 66: Total US retail sales of pet supplies, by channel, at current prices, 2011-16

Figure 67: Total US retail sales of pet supplies, by channel, at current prices, 2014 and 2016

## Appendix – Key Players

Figure 68: MULO sales of pet litter and deodorant, by leading companies and brands, rolling 52-weeks 2015 and 2016

Figure 69: MULO sales of rawhide dog chews by leading companies and brands, rolling 52-weeks 2015 and 2016

Figure 70: MULO sales of pet needs, by leading companies and brands, rolling 52-weeks 2015 and 2016

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)