

## Pet Supplies - US - June 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

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



"Americans are spending more on their pets than ever before. Pet parents increasingly look for products that align with their own personal preferences and beliefs, and are willing to spend a bit more to provide their fur babies with safe and healthy products."

- **Rebecca Cullen, Household Care Analyst**

This report looks at the following areas:

- **Engaging the unengaged: As pets age, engagement declines**
- **Younger pet owners are price-driven**

**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 - June 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

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

State of the market

Figure 1: Total US sales and fan chart forecast of pet supplies, at current prices, 2013-23

Market challenges

Engaging the unengaged: As pets age, engagement declines

Figure 2: Repertoire of house, travel, and apparel pet supplies purchased, by age of pet, March 2018

Younger pet owners are price-driven

Figure 3: Attitudes toward safety and willingness to increase spend, by age, March 2018

Mintel recommends

Acknowledge shifting pet population trends

Figure 4: Number of pet-owning households, 2010-17

Meet the needs of an aging pet population

Figure 5: Select attitudes and behaviors toward pet health, by age of pet, March 2018

Focus on claims that convey safety, health

Figure 6: Select attitudes and behaviors toward pet supplies, purchase factors, any (net), March 2018

What it means

### The Market – What You Need to Know

Steady growth trajectory continues

Other pet supplies dominates the market

Dogs still America's favorite pet, pet population aging

### Market Size and Forecast

Market to maintain momentum through 2023

Figure 7: Total US sales and fan chart forecast of pet supplies, at current prices, 2013-23

Figure 8: Total US retail sales and forecast of pet supplies, at current prices, 2013-23

### Market Breakdown

Other pet supplies strongest growth over last five years

Figure 9: Total US retail sales of pet supplies, by segment share, 2018

Figure 10: Total US retail sales and forecast of pet supplies, by segment, at current prices, 2013-18

### Market Factors

America's pets – Pet ownership continues to climb

Figure 11: Number of pet-owning households, 2010-17

Figure 12: Number of pet-owning households, by type of pet, 2010-17

**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 - June 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

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

Most stick to one pet in the home, pet population aging

Figure 13: Profile of America's pets, March 2018

A diverse and aging human population impacts market

Figure 14: Population aged 18 or older, by age, 2013-23

Figure 15: Distribution of population, by age and race/Hispanic origin, 2018

## Key Players – What You Need to Know

Nestlé maintains leading spot, smaller players gaining share

Crossing over: brands capitalize on humanization trend

A focus on natural, free-from claims

Pet health trends mirroring humans

## Manufacturer Sales of Pet Supplies

Nestlé loses share but stays on top

Clorox, Church & Dwight see slight lift

Manufacturer sales of pet supplies

Figure 16: MULO sales of pet supplies, by leading company, 2017 and 2018

## What's Working?

Litter: staple for cat owners, and potentially even small dog owners

Human to pet brands

Who is doing this well?

Figure 17: MULO sales of Serta pet beds, rolling 52 weeks 2017 and 2018

Figure 18: 8 Pour Chiens et Chats (8 for dogs and cats), September 2017

Natural claims popular across segments

Who is doing this well?

Figure 19: MULO sales of select pet health products, rolling 52 weeks 2017 and 2018

Figure 20: MULO sales of select rawhide dog chew brands, rolling 52 weeks 2017 and 2018

## What's Struggling?

Non-clay litter alternatives lacking

Figure 21: MULO sales of identified non-clay litter brands, rolling 52 weeks 2017 and 2018

Rawhides challenged by recalls, movement toward natural

Figure 22: MULO sales of rawhide dog chews, by leading companies and brands, rolling 52 weeks 2017 and 2018

## What's Next?

Pet health products, services, concerns closely mirror humans

Pet self-care movement emerges

#Fitspo: pets of all sizes fitness and nutritional goals

Pet healthcare becoming more available

Made in America gains pet owners trust

"Pet"nology becomes more mainstream, yet will need to prove value

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 - June 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

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

## The Consumer – What You Need to Know

- Young adults pamper pets with “essentials”
- Healthier living trends driving health product purchases
- Pet-specific and made in US label reach widest audience
- Safety outweighs cost; owners willing to spend on fur babies
- Owners manage pet health, voice emotional and aging health concerns
- Interest in innovations reflect human product trends

## House, Travel, and Apparel Pet Supplies Purchased

- Younger adults more invested in pampering pets
  - Figure 23: Repertoire of house, travel, and apparel pet supplies purchased, March 2018
  - Figure 24: House, travel, and apparel pet supplies purchased, by age, parental status, March 2018
- Puppies getting pampered
  - Figure 25: Repertoire of house, travel, and apparel pet supplies purchased, by dog, cat ownership, age of pet, March 2018
- Multicultural pet owners engaged in market
  - Figure 26: Select house, travel, and apparel pet supplies purchased, by race and Hispanic origin, March 2018

## Health and Grooming Pet Supplies Purchased

- Pet owners becoming more invested in pet health
  - Figure 27: Health and grooming pet supplies purchased, trended, 2016-18
- Educate new pet parents on benefits of in-between-vet visit products
  - Figure 28: Select health pet supplies purchased, by age of dog, cat, March 2018

## Purchase Factors

- Pet-specific features outweigh other factors
- Products need to withstand wear and tear without compromising safety
  - Figure 29: Purchase factors, by segment, any (net), March 2018
- Pet-specific, locally made garners the widest reach
  - Figure 30: TURF analysis – Purchase factors, March 2018
- Methodology
- First-time pet owners seek health claims, reassurance
  - Figure 31: Purchase factors, any (net), by age, March 2018
- Dog owners consider range of features
  - Figure 32: Purchase factors, any (net), by dog, cat ownership, March 2018

## Attitudes and Behaviors toward Pet Supplies

- Safety outranks price, functional health benefits could increase spend
  - Figure 33: Attitudes and behaviors toward pet supplies, March 2018
- Younger adults try to balance pet costs with financial responsibilities
  - Figure 34: Attitudes toward safety and willingness to increase spend, by age, March 2018
- Cat owners more price sensitive
  - Figure 35: Safety vs price, by type of pet owned, March 2018

**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 - June 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

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

## Attitudes and Behaviors toward Pet Health

Pet owners proactive in managing pet's health

Figure 36: Attitudes and behaviors toward pet health, March 2018

Pet insurance lifts (some) financial burden of vet visits

Figure 37: Vet visit frequency by pet insurance owners, March 2018

Older pets have greater need for health products

Figure 38: Select Attitudes and behaviors toward pet health, by age of pet, March 2018

## Interest in Innovations

Health-focused products garner the most interest

Pet tech continues to emerge, yet will need to prove value

Figure 39: Interest in innovations, March 2018

Multiple and younger pet owners find value in pet tech, health products

Figure 40: Interest in select pet product innovations, by dog, cat ownership, March 2018

Figure 41: Interest in select pet product innovations, by age of dog, cat, March 2018

In their words:

Younger and multicultural pet owners most excited by innovations

Figure 42: Interest in select pet product innovations, among adults aged 18-34, Black and Hispanic adults, March 2018

## Appendix – Data Sources and Abbreviations

Data sources

Sales data

Fan chart forecast

Consumer survey data

Consumer qualitative research

Abbreviations and terms

Abbreviations

## Appendix – The Market

Figure 43: Total US sales and forecast of pet supplies, at inflation-adjusted prices, 2013-23

Figure 44: Total US retail sales and forecast of pet supplies, by segment, at current prices, 2013-23

Figure 45: Total US retail sales of pet supplies, by segment, at current prices, 2016 and 2018

Figure 46: Total US retail sales and forecast of litter & deodorant, at current prices, 2013-23

Figure 47: Total US retail sales and forecast of rawhide dog chews, at current prices, 2013-23

Figure 48: Total US retail sales and forecast of other pet supplies, at current prices, 2013-23

Figure 49: Total US retail sales of pet supplies, by channel, at current prices, 2013-18

Figure 50: Total US retail sales of pet supplies, by channel, at current prices, 2016 and 2018

## Appendix – Key Players

Figure 51: MULO sales of other pet supplies, by leading companies and brands, rolling 52 weeks 2017 and 2018

Figure 52: MULO sales of cat and dog litter and deodorant, by leading companies and brands, rolling 52 weeks 2017 and 2018

Figure 53: Share of pet product launches, by claim, 2013-18\*

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 - June 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

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

### Appendix – The Consumer

Figure 54: Summary of bases for pet ownership, October 2009-November 2017

**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)