

Report Price: £3085.18 | \$3995.00 | €3666.43

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



The pet supplies market reached \$11.4 billion in 2017, a 3% increase from the previous year. The pet humanization trend continues to benefit the market as pet owners are equating their pets' needs and interests to their own. This is generating interest in pet supplies and services that follow consumer trends including natural and safe ingredients, smart technology, and subscription services.

This report looks at the following areas:

- Cat owners less engaged in the market
- Most purchasing narrow range of products
- Engagement declines with age, younger adults active purchasers
- Pet-specific, durability factor strongly into purchase decisions

BUY THIS REPORT NOW

VISIT: 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

DID YOU KNOW?

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



Report Price: £3085.18 | \$3995.00 | €3666.43

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

Cat owners less engaged in the market

Figure 1: Select house, travel, apparel, health, and grooming purchases, by type of pet owned, April 2017

Most purchasing narrow range of products

Figure 2: Pet supplies purchased, repertoire of products used, April 2017

Engagement declines with age, younger adults active purchasers

Figure 3: House, travel, and apparel pet supplies purchased, by age, April 2017

Pet-specific, durability factor strongly into purchase decisions

Figure 4: Top six purchase factors for any pet accessories, rawhide, or grooming supplies, April 2017

The opportunities

Growth in pet population could stimulate market

Figure 5: Type of pet owned, June 2016 - April 2017

Younger pet owners interested in pet tech

Figure 6: Interest in pet supply technology innovations, by age, April 2017

Expand natural offerings, emphasize safety and health

Figure 7: Interest in premium treats, Importance of natural and health claims, April 2017

What it means

The Market - What You Need to Know

Solid sales growth as pet owners look to improve pet's life

Other dog/cat supplies account for nearly half of category sales

America's pet population increasing

Booming tick population

Market Size and Forecast

Solid category growth aligns with humanization trends

Figure 8: Total US sales and fan chart forecast of pet supplies, at current prices, 2012-22

Figure 9: Total US retail sales and forecast of pet supplies, at current prices, 2012-22

Market Breakdown

Other dog/cat pet supplies accounts for nearly half of category sales

Figure 10: Share of pet supplies sales, by segment, 2017

Litter and deodorant drive growth

Figure 11: Total US retail sales of pet supplies, by segment, at current prices, 2012-17

Market Perspective

BUY THIS REPORT NOW

VISIT: 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



Report Price: £3085.18 | \$3995.00 | €3666.43

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

Profile of America's pets

Figure 12: Type of pet owned, April 2017

Figure 13: Number of dogs or cats owned, type of dog, age of dog, April 2017

Crack down on pet stores, mills

Figure 14: Cat and dog acquisition, April 2017

Market Factors

Pet obesity levels on the rise

Aging population, fewer households with children may hinder market

Figure 15: Population aged 18 or older, by age, 2012-22

Figure 16: Households, by presence of related children, 2006-16

Key Players - What You Need to Know

Leading companies losing share to smaller competitors, private label

Pets bring influence to social media, natural claims increase

Human-inspired products trending

Manufacturer Sales of Pet Supplies

Nestlé maintains category lead, strong growth among smaller players, private label

Manufacturer sales of pet supplies

Figure 17: MULO sales of pet supplies, by leading companies, rolling 52 weeks 2016 and 2017

What's Working?

High tick count benefits flea and tick products

Figure 18: MULO sales of select flea and tick treatment products, rolling 52 weeks 2016 and 2017

Brands dominate product launches yet private label sees most growth

Figure 19: Percentage of pet supply product launches, by brand type, 2012-17*

Figure 20: MULO sales of private label, by segment, rolling 52 weeks 2017-17

Animal influencers on social media

Pet retailers heighten competition, expand online presence

Brands shifting focus to natural and ethical claims

Figure 21: Percentage of pet supplies product launches, by claim category, 2012-17*

Services that cater to new pet owners

What's Struggling?

Latest rawhide recall adds to MULO segment struggles

Sacrificing lifestyle deters one third of Americans from pet ownership

Figure 22: Barriers to ownership, April 2017

What's Next?

National pride: pet products made in the $\ensuremath{\mathsf{US}}$

In the future...

...owners will be able to communicate with pets

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300



Report Price: £3085.18 | \$3995.00 | €3666.43

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

...pets will eat and sleep better

...and work, travel, and play in comfort

The Consumer - What You Need to Know

Functional supplies see lift

Dog owners purchasing wider range of health products

Pet specific attributes prioritized when shopping category

Pet owners actively managing pet health

Innovations of most interest reflect consumer product trends

House, Travel, and Apparel Pet Supplies Purchased

Nonessential products struggle, dog owners heavier purchasers

Figure 23: House, travel, and apparel pet supplies purchased, June 2016-April 2017

Figure 24: Select house, travel, and apparel pet supply purchases, by type of pet owned, April 2017

Younger adults, parents spare no expense for their 'fur babies'

Figure 25: Select house, travel, and apparel pet supplies purchased, by age and household income, April 2017

Figure 26: Select travel and apparel pet supplies purchased, by age of children in the home, April 2017

Hispanics travel with pets in style

Figure 27: Select travel and apparel pet supplies purchased, by Hispanic origin, April 2017

Travel, apparel appeal to urbanites

Figure 28: Select travel and apparel pet supplies purchased, by living location, April 2017

Health and Grooming Pet Supplies Purchased

Litter most purchased, dog owners heavier users of health products

Figure 29: Health and grooming pet supplies purchased, April 2017

Figure 30: Select health pet supplies purchased, by type of pet owned, April 2017

Figure 31: Health pet supplies purchased, by vet visitation, April 2017

Younger adults over index for grooming and health product purchases

Figure 32: Select health and grooming pet supplies purchased, by age, April 2017

Income impacts spend on health pet supplies

Figure 33: Select health pet supplies purchased, by household income, April 2017

Purchase Factors

Pet-specific, quality, and natural features influence purchases

Figure 34: Purchase factors, by segment, any (net), April 2017

Made in USA outweighs brand, reviews

Figure 35: TURF Analysis – Purchase factors, April 2017

TURF Methodology

Men focus on brand, rely on recommendations

Figure 36: Select grooming supplies and rawhide purchase factors, by gender, April 2017

Younger adults, parents consider variety of factors before purchasing

Figure 37: Select pet supply purchase factors, any pet supplies (net), by age, parental status, April 2017

BUY THIS REPORT N<u>OW</u> VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300



Report Price: £3085.18 | \$3995.00 | €3666.43

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

Attitudes toward Pet Health

Adults more proactive than reactive with pet's health

Figure 38: Attitudes toward pet health, April 2017

Pet health higher priority for dog owners

Figure 39: Select attitudes toward pet health, by type of pet, April 2017

Women more active in their pet's health

Figure 40: Select attitudes toward pet health, by gender, April 2017

Pet health perceptions are tied to age, presence of children

Figure 41: Select attitudes toward pet health, by age, parental status, April 2017

Interest in Innovations

Strong interest in premium offerings, smart technology

Figure 42: Interest in innovations, April 2017

Smart tech, services appeal to owners of multiple and younger pets

Figure 43: Interest in smart technology and virtual vet services, by type of pet owned, April 2017

Figure 44: Interest in select innovations, by age of dog, April 2017

Younger pet owners, parents excited by premium ingredients, pet tech

Figure 45: Interest in innovations, by age, parental status, April 2017

Hispanic pet owners gravitate toward smart technology

Figure 46: Interest in select innovations, by Hispanic origin, April 2017

Appendix - Data Sources and Abbreviations

Data sources

Sales data

Fan chart forecast

Consumer survey data

Abbreviations and terms

Abbreviations

Appendix - The Market

Figure 47: Total US retail sales and forecast of pet supplies, at inflation-adjusted prices, 2012-22

Figure 48: Total US retail sales and forecast of pet supplies, by segment, at current prices, 2012-22

Figure 49: Total US retail sales of pet supplies, by segment, at current prices, 2015 and 2017

Figure 50: Total US retail sales and forecast of litter & deodorant, at current prices, 2012-22

Figure 51: Total US retail sales and forecast of rawhide dog chews, at current prices, 2012-22

Figure 52: Total US retail sales and forecast of non-dog/cat supplies, at current prices, 2012-22

Figure 53: Total US retail sales and forecast of other dog/cat supplies, at current prices, 2012-22

Figure 54: Total US retail sales of pet supplies, by channel, at current prices, 2015 and 2017

Appendix - Key Players

Figure 55: MULO sales of pet litter and deodorant, by leading companies and brands, rolling 52 weeks 2016 and 2017

Figure 56: MULO sales of rawhide dog chews, by leading companies and brands, rolling 52 weeks 2016 and 2017

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300



Report Price: £3085.18 | \$3995.00 | €3666.43

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

Figure 57: MULO sales of non cat/dog needs, by leading companies and brands, rolling 52 weeks 2016 and 2017

Figure 58: MULO sales of pet needs, by leading companies and brands, rolling 52 weeks 2016 and 2017

Appendix - The Consumer

Figure 59: Household pet ownership, February 2007-March 2017

Figure 60: Type of pet owned, June 2016 - April 2017

Figure 61: Age of dog, by gender, age, Hispanic origin, age of children in household, age and income, and living location, April 2017