Pet Food - US - July 2019

"The pet food market found continued steady, conservative growth sustained by rising pet ownership coupled with premium innovation that reflects pet owner aspirations to provide nutrition, wellness and happiness to pets as valued members of the family."

- John Owen,

Associate Director - Food \& Drink

This report looks at the following areas:

- Slow, steady growth continues
- Pet specialty and mass still lead, but online is gaining fast
- Dry food purchase near universal, but treats and wet food on the rise
- More cat owners use both dry and wet food

The changing retail landscape for pet foods, treats and supplies will continue to play a role in the diversification of brands and products.

BUY THIS REPORT NOW<br>VISIT: store.mintel.com<br>CALL: EMEA<br>+44(0)2076064533<br>Brazil 08000959094<br>Americas<br>+1 (312) 9435250<br>China<br>+86 (21) 60327300<br>+61(0) 282848100<br>EMAIL: reports@mintel.com

## Pet Food - US - July 2019

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

## Key takeaways

The issues
Slow, steady growth continues
Figure 1: Total US sales and fan chart forecast of pet food, at current prices, 2014-24
Pet specialty and mass still lead, but online is gaining fast
Figure 2: Pet food purchase location used most often, March 2019
Dry food purchase near universal, but treats and wet food on the rise
Figure 3: Dog food/treats purchased, March 2019
More cat owners use both dry and wet food
Figure 4: Cat food/treats purchased, March 2019
The opportunities
Pet specialty and online shoppers have similar pet food priorities
Figure 5: Dog and cat food purchase factors, by primary pet food retailer, March 2019
Dual dog/cat owners a key target for new pet food and treat concepts
Figure 6: Pet food and treats innovation areas, by type of pet owned, March 2019
Younger pet owners especially engaged in pet food decisions
Figure 7: Pet food attitudes, by age, March 2019

The Market - What You Need to Know
Slow, steady growth continues
Dog and cat food dominate category
Pet ownership is on the rise

## Market Size and Forecast

Slow, steady growth continues
Figure 8: Total US sales and fan chart forecast of pet food, at current prices, 2014-24
Figure 9: Total US sales and forecast of pet food, at current prices, 2014-24

## Market Breakdown

Dog and cat food dominate category
Figure 10: Share of pet food, by segment, 2019
Dog food sales growth outpaces cat food
Treats lead category growth
Figure 11: Sales of pet food, by segment, 2014-2019

## Market Factors

## Pet Food - US - July 2019

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

Pet ownership is on the rise
Figure 12: Number of pet-owning households, 2011-18
Dogs remain American's preferred pet
Figure 13: Number of pet-owning households, by type of pet, 2011-18
Figure 14: Type of pet owned, by age, April 2019
Pet population aging; young and multicultural adults own younger pets
Figure 15: Profile of America's pets, by age and race and Hispanic origin, April 2019

## Key Players - What You Need to Know

Declines for value- and mid-priced brands impact total Purina sales
Super-premium brands continue to grow in mass channels
Treats have more room to grow
Customization meets convenience
Company and Brand Sales of Pet Food
Declines for value- and mid-priced brands impact total Purina sales
Nutro expansion helps Mars Inc. notch gain
Smucker gets a small boost from Rachel Ray Nutrish acquisition
Sales of pet food by company
Figure 16: Multi-outlet sales of pet food, by leading companies, rolling 52 weeks 2018 and 2019

## What's Working?

Super-premium brands continue to grow in mass channels
Figure 17: Multi-outlet sales of select super-premium pet food brands, rolling 52 weeks 2018 and 2019
Treats have more room to grow
Small competitors and private label make big gains in dog treats
Tempting tastes drive cat treats
Figure 18: Multi-outlet sales of dog treats and cat treats, 2014-19
FreshPet continues to climb, offers greater customizability
What's Struggling?
Established leaders slip as new entrants gain traction

## What's Next?

Customization meets convenience
Addressing pets' emotional health through food and treats

## The Consumer - What You Need to Know

Online purchase gaining on specialty and mass
Retailer choice driven by convenience, price
Clean nutrition generates strong interest
Younger pet food shoppers' preferences reflect their own food priorities
Dog owners more engaged in category than cat owners

Pet specialty and mass still lead, but online is gaining fast
Figure 19: Pet food purchase location used most often, March 2019
Younger pet owners likely to shop in pet specialty or mass merchandisers
Figure 20: Pet food purchase location used most often, by age, March 2019
Supermarkets a key channel for cat food
Figure 21: Pet food purchase location used most often, by type of pet owned, March 2019

## Reasons for Selecting Primary Purchase Location

Convenience and low prices drive retailer choice
Figure 22: Reasons for selecting primary pet food purchase location, March 2019
Selection of food and supplies remains a key asset for pet specialty
Figure 23: Reasons for selecting primary pet food purchase location, by primary pet food retailer, March 2019
In their words: Deciding where to buy pet food

## Dog Food/Treats Purchased

Dry food purchase near universal, but treats and wet food on the rise
In their words: The treat experience
Figure 24: Dog food/treats purchased, March 2019
Younger dog owners show interest in toppers
Figure 25: Dog food/treats purchased, by age, March 2019
Pet specialty and online shoppers far more likely to buy toppers
Figure 26: Dog food/treats purchased, by primary pet food retailer, March 2019

## Cat Food Treats Purchased

More cat owners use both dry and wet food
Opportunity to increase treat frequency
Figure 27: Cat food/treats purchased, March 2019
Younger cat owners more inclined to use toppers
Figure 28: Cat food/treats purchased, by age, March 2019
Treats, toppers find online presence
Figure 29: Cat food/treats purchased, by primary pet food retailer, March 2019

## Pet Food Purchase Factors

Taste stands out as priority for cat food
Figure 30: Dog and cat food purchase factors, by species, March 2019
Younger pet food shoppers' preferences reflect their own food priorities
Figure 31: Dog and cat food purchase factors, by age, March 2019
Pet specialty and online shoppers have similar pet food priorities
Figure 32: Dog and cat food purchase factors, by primary pet food retailer, March 2019
In their words: Selecting food

BUY THIS
REPORT NOW

## Pet Food - US - July 2019

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

Pet Food and Treats Innovation Areas
Treat concepts generate strongest interest
Figure 33: Pet food and treats innovation areas, March 2019
Younger pet owners a key target for sustainability in pet food
Figure 34: Pet food and treats innovation areas, by age, March 2019
Dual dog/cat owners a key target for new pet food and treat concepts
Figure 35: Pet food and treats innovation areas, by type of pet owned, March 2019
In their words: Selecting treats

## Pet Food Attitudes

Safety and health are key concerns for pet food purchasers
Pet owners' concerns drive premiumization of category
Figure 36: Pet food attitudes, March 2019
Younger pet owners especially engaged in pet food decisions
Figure 37: Pet food attitudes, by age, March 2019
Dog owners and dual owners more engaged in category than cat owners
Figure 38: Pet food attitudes, by type of pet owned, March 2019
Specialty and online shoppers share ideals
Figure 39: Pet food attitudes, by primary pet food retailer, March 2019
Appendix - Data Sources and Abbreviations
Data sources
Sales data
Fan chart forecast
Consumer survey data
Consumer qualitative research
Direct marketing creative
Abbreviations and terms
Abbreviations
Terms

## Appendix - The Market

Figure 40: Total US sales and forecast of pet food, at inflation-adjusted prices, 2014-24
Figure 41: Total US sales and forecast of cat food, at current prices, 2014-24
Figure 42: Total US sales and forecast of dog food, at current prices, 2014-24
Figure 43: Total US sales and forecast of other pet food, at current prices, 2014-24
Figure 44: Total US sales and forecast of pet treats, at current prices, 2014-24

## Appendix - Additional Market Data

Figure 45: Multi-outlet sales of cat food, dog food, and pet treats by sub-segments, 2014-2019
Figure 46: Total US retail sales of pet food, by channel, at current prices, 2014-19

## Pet Food - US - July 2019

## Appendix - Key Players

Figure 47: Multi-outlet sales of cat food, by leading companies and brands, rolling 52 weeks 2018 and 2019
Figure 48: Multi-outlet sales of dog food, by leading companies and brands, rolling 52 weeks 2018 and 2019
Figure 49: Multi-outlet sales of other pet food, by leading companies and brands, rolling 52 weeks 2018 and 2019 Figure 50: Multi-outlet sales of pet treats, by leading companies and brands, rolling 52 weeks 2018 and 2019

BUY THIS REPORT NOW

