

Pet Food - US - 2022

Report Price: £3695 | \$4995 | €4400

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

This report looks at the following areas:

- Sales and market share trends across dog food, cat food, other pet food and treats
- Pet food purchasers' retail channel preferences and priorities when selecting food and treats
- Opportunities for innovation in pet food and treats
- Attitudes and behaviors toward pet food, treats and the feeding experience

Inflation is driving sharp increases in pet food dollar sales but isn't weakening pet owners' resolve to feed their pets the best, supporting continued opportunities for premium products that deliver on quality and nutrition.

Highly attentive pet owners also want to ensure that their pets enjoy the feeding and treating experience, creating growth opportunities for treats, toppers and wet food.

Ethical issues and sustainability have a growing impact on the human food market as more consumers expect retailers and manufacturers to take action to minimize food waste and environmental impact. That sentiment is also manifesting itself in the pet food market, creating opportunities for more sustainable alternatives.



"Inflation is driving sharp increases in pet food dollar sales but isn't weakening pet owners' resolve to feed their pets the best. Quality, health and palatability are as important as ever. In addition, a new generation of sustainability-minded owners will demand options that are easier on the planet but still deliver on nutrition and taste."

– **John Owen, Associate Director**

Buy this report now

Visit	store.mintel.com
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

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**
- **This Report looks at the following areas**
- **Definition**
- **Market context**

EXECUTIVE SUMMARY

- **Top takeaways**
- **Market overview**
Figure 1: Total US sales and fan chart forecast of pet food, at current prices, 2017-27
Figure 2: Pet food category outlook, 2022-27
- **Opportunities and challenges**
- **Dog and cat owners look for a balance in quality, health and palatability**
Figure 3: Pet food purchase factors, 2022
- **Health and palatability more likely than savings to drive pet food switching**
Figure 4: Pet food behaviors – Food change, 2022
- **Opportunity to increase treat incidence and frequency**
Figure 5: Pet food behaviors – Daily treating, 2022
- **A new generation of owners prioritizes sustainability in pet food**
Figure 6: Pet food and treat innovation areas related to sustainability, by age, 2022
- **Key consumer insights**
- **Online growth slows**
- **Dry dog food is still the default choice, but wet has room for further growth**
- **New generation of cat owners creates market for premium cats-only brands**
- **The limits of humanization**

MARKET SIZE AND FORECAST

- **Short-term inflation-driven spike distorts moderate long-term growth trend**
Figure 7: Total US sales and fan chart forecast of pet food, at current prices, 2017-27
Figure 8: Total US sales and forecast of pet food, at current prices, 2017-27

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
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

Report Price: £3695 | \$4995 | €4400

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

SEGMENT PERFORMANCE

- **Dog and cat products account for most of category sales**
Figure 9: Share of sales of pet food, by segment, 2022 (est)
- **Inflation lifts all segments; treats has greatest potential for further growth**
- **Dry food is still on top, but other forms have more momentum**

Figure 10: Total US sales and forecast of pet food, by segment, at current prices, 2017-22

MARKET FACTORS

- **Pet food is an economically resilient category**
Figure 11: Consumer Price Index change from previous year, 2020-22
Figure 12: Personal assessment of financial health, 2021-22

MARKET SHARE/KEY PLAYERS

- **Top competitors see little share change**
- **Beyond top competitors, further premiumization**
- **Sales of pet food by company**
Figure 13: Multi-outlet sales of pet food, by leading companies, rolling 52 weeks 2021 and 2022

COMPETITIVE STRATEGIES AND MARKET OPPORTUNITIES

- **Alternative proteins gain momentum**
Figure 14: Pet food and treat products featuring alternative proteins
- **Appetizing opportunities in the cat food market**
Figure 15: US pet food/treat launches, by type of pet, 2018-22

THE PET FOOD CONSUMER – FAST FACTS

- **Online growth slows**
- **Dry food is still the default choice, but wet has room for further growth**
- **Balancing quality, health and palatability is key on both sides of the aisle**
- **Health and palatability more likely than savings to drive pet food switching**
- **Opportunity to increase treat incidence and frequency**
- **A new generation of owners prioritizes sustainability in pet food**

PET FOOD PURCHASE LOCATIONS

- **Online growth slows**

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
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

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

Figure 16: Pet food purchase locations, 2022

- **Desire for value and convenience drive pet food retailer choices**

Figure 17: Pet food purchase locations, by type of pet owned, 2022

DOG FOOD AND TREATS PURCHASED

- **Dry food is still the default choice, but wet has room for further growth**

Figure 18: Dog food and treats purchased, 2022

- **Toppers strongest in specialty and online**

Figure 19: Dog food and treats purchased, by primary pet food retailer, 2022

CAT FOOD AND TREATS PURCHASED

- **Cat owners more likely to be dual-form purchasers**

Figure 20: Cat food and treats purchased, 2022

- **Toppers skew strongly to specialty and online**

Figure 21: Cat food and treats purchased, by primary pet food retailer, 2022

PET FOOD PURCHASE FACTORS

- **Gap narrows between cat and dog owners' desire for quality, health and palatability**

Figure 22: Pet food purchase factors, 2022

- **Premium cats-only brands stirred by next generation pet owners**

Figure 23: Cat food purchase factors, by age, 2022

- **Specialty and online shoppers more likely to focus on product quality**

Figure 24: Pet food purchase factors – NET: dog or cat, by primary pet food retailer, 2022

PET FOOD BEHAVIORS

- **Purchase shifts driven by health and taste before savings**

Figure 25: Pet food behaviors – Food change, 2022

- **Room to grow treat incidence and frequency**

Figure 26: Pet food behaviors – Daily treating, 2022

- **Cat owners more likely to be dual wet/dry feeders**

Figure 27: Dog and cat food types purchased, 2022

- **Dual-feeding dog owners especially likely to mix wet and dry**

- **More dual-feeding cat owners feed wet primarily**

Figure 28: Pet food behaviors – Dual-form feeding, 2022

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

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

Report Price: £3695 | \$4995 | €4400

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

PET FOOD AND TREAT INNOVATION AREAS

- **Health maintenance a key priority for pet food shoppers**
Figure 29: Pet food and treat innovation areas, 2022
- **Sustainable pet food trends driven by a next generation of pet owners**
Figure 30: Pet food and treat innovation areas, by age, 2022

ATTITUDES TOWARD PET FOOD AND TREATS

- **The limits of humanization**
Figure 31: Attitudes toward pet food and treats, 2022
- **Young pet owners' limited budgets and high expectations point to premium private label**
Figure 32: Attitudes toward pet food and treats – Ethics, sustainability and price sensitivity, by age, 2022
- **Health, sustainability outrank price for specialty and online shoppers**
Figure 33: Attitudes toward pet food and treats – Value, ethics and sustainability, by primary pet food retailer, 2022

APPENDIX – DATA SOURCES AND ABBREVIATIONS

- Data sources
- Sales data
- Forecast
- Consumer survey data
- Abbreviations and terms
- Abbreviations
- Terms

APPENDIX – THE MARKET

Figure 34: Total US retail sales and forecast of pet food, at inflation-adjusted prices, 2017-27

Figure 35: Total US retail sales and forecast of cat food, at current prices, 2017-27

Figure 36: Total US retail sales and forecast of cat food, at inflation-adjusted prices, 2017-27

Figure 37: Total US retail sales and forecast of dog food, at current prices, 2017-27

Figure 38: Total US retail sales and forecast of dog food, at inflation-adjusted prices, 2017-27

Figure 39: Total US retail sales and forecast of other pet food, at current prices, 2017-27

Figure 40: Total US retail sales and forecast of other pet food, at inflation-adjusted prices, 2017-27

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
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

Report Price: £3695 | \$4995 | €4400

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

Figure 41: Total US retail sales and forecast of pet treats, at current prices, 2017-27

Figure 42: Total US retail sales and forecast of pet treats, at inflation-adjusted prices, 2017-27

Figure 43: Total US retail sales of pet food, by retail channel, at current prices, 2017-22

APPENDIX – OTHER MARKET DATA

Figure 44: Multi-outlet sales of pet food, by subsegment, 2017-22

APPENDIX – COMPANIES AND BRANDS

Figure 45: Multi-outlet sales of cat food, by leading companies and brands, rolling 52 weeks 2021 and 2022

Figure 46: Multi-outlet sales of dog food, by leading companies and brands, rolling 52 weeks 2021 and 2022

Figure 47: Multi-outlet sales of other pet food, by leading companies and brands, rolling 52 weeks 2021 and 2022

Figure 48: Multi-Outlet sales of pet treats, by leading companies and brands, rolling 52 weeks 2021 and 2022

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
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



About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.