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Pet Food in the U.S., 10th Edition

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Abstracts

With volume sales relatively flat, competition for every pet food dollar has never been more intense, such that pet food marketers' attentions are firmly directed toward presenting products that stand out while establishing or maintaining position in the all-important premium/natural segment. As mass-market pet food sales stagnate, with growth of under half a percentage point for the 52 weeks ending January 27, 2013, the action is in premium and superpremium foods where growth has reached double digits in some segments. With Hill's reformulating Science Diet as a natural product, Walmart launching Pure Balance as its first natural pet food store brand, Nestlé Purina coming on strong with Purina One Beyond, Merrick taking acquiring Castor & Pollux and obtaining organic certification, and Del Monte acquiring Natural Balance, everyone is stepping up their game to take advantage of the natural boom. Yet another market driver is the fact that, more than ever, pet specialty and mass-market brands are growing significantly more alike in terms of offerings. In order to differentiate, marketers are turning to trends such as grain-free, "meat first" and human grade products.

As pet superstores draw shoppers away from supermarkets and mass merchandisers with increased customer service and a greater range of products, discount and online retailers are putting the pressure on pet retailers across the board, offering quality products at substantially lower prices. Although pet-owning households have slowly increased their income level, with 29.4% of dog or cat-owning households making $60,000 a year or more in 2012 compared with 27.8% in 2007, the percentage of pet owners shopping at discount stores remains high, at nearly 25%, based on Simmons Fall 2012 consumer survey data. Additionally, although online shopping for pet products is significanly lower than in other retail channels, at just over 6% in 2012, dog and cat owners are more likely than the population at large—at 15% and 23%, respectively—to shop online in general, leading to the potential for more online shopping growth in the pet market.

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Bringing to bear more than 20 years of experience in analyzing this market and drawing on Packaged Facts' broad cross-category expertise, this study pinpoints strategic directions for current and prospective marketers, with a forward-looking focus on high-growth product segments and market drivers. Covering products for all types of companion animals, the report devotes separate chapters to Dog Food, Cat Food, and Other Pet Food (birds, small animal, fish, and reptiles), while also providing a comprehensive Market Overview covering cross-market trends and opportunities through 2017.

The report provides market size estimates for the overall retail universe, while quantifying mass-market sales to the marketer/brand share level using data from IRI. It also charts market size and marketer share figures for the natural and specialty/gourmet supermarket channels, using SPINSscan sales tracking data. In sum, Pet Food in the U.S., 10th Edition thoroughly documents competitive, new product and retail trends, as well as trends in pet food purchaser demographics, brand preferences, cross-channel shopping, and cross-product purchasing. Consumer profiling is based on exclusive data from Packaged Facts' own quarterly pet owners surveys and customized cross tabulations of Simmons consumer survey data from Experian Marketing Services. Dozens of images of pet food and treat products and consumer and trade ads are included.

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Shopping Patterns

Table 3-26: Purchasing Patterns for Leading Dog Food/Treat Brand Lines: By Retail Channel Shopped, 2012 (percent)

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