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Pet Food in the U.S., 9th Edition

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Abstracts

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In the post-recession pet food world, acquisitions and capital investments promise to reshape the U.S. pet food market. During 2010, Procter & Gamble/Iams acquired holistic pet food maker Natura, Nestlé Purina bought fast-growth treats maker Waggin' Train, and Del Monte was snapped up by a group of investors including KKR for the tidy sum of $5.3 billion. As the early 2011 acquisition of Petmate by private equity firm Wind Point Partners makes clear, this keen interest in all things pet is industry-wide, with smaller companies also receiving capital infusions. Breathing additional dynamism into the market are health-related marketing and product development initiatives including a wave of grain-free pet foods, new weight-loss foods and programs from major market forces including Hill's and Purina, and a flood of additional special diet and condition-specific functional foods and treats that takes the notion of pet pampering to a new level.

At the same time, the market continues to face challenges related to consumer cutbacks and retail price wars. Toward the end of the historical 2006-2010 period examined here, the $70K-plus households who have been largely driving the product premiumization trend took a step back, as did some of the consumers buying natural products. As signs of the times, Mars discontinued its Goodlife Recipe line of "natural light" pet foods, and Nestlé Purina quietly withdrew its Pet Promise "stealth brand" from the natural supermarket channel. In addition, during 2010, the number of new products tagged Upscale halved as marketers and retailers continued to focus on value-related appeals, while the number of private-label entries rose. Looking ahead into 2011, this sort of temperance will remain a smart strategy, since in Packaged Facts' most recent survey of pet owners, conducted in February 2011, almost three-quarters of pet owners agree with the statement "I think many pet products are becoming too expensive."

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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, ***Pet Food in the U.S., 9th Edition*** 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 type 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 2015. Among these: impact of recession and economic recovery; recent and expected mergers and acquisitions; private-label inroads; advertising and promotional trends including social media and cause marketing; green initiatives; the multifaceted trend of natural and organic foods (which despite a slowdown continue to outpace the market as a whole); grain-free/non-allergenic foods; "meat first" products; weight maintenance and senior foods; customized and preportioned foods; "whole" and human-grade ingredients including fruits, vegetables, whole grains, etc.; and novel ingredients such as glucosamine, omega fatty acids, antioxidants and probiotics.

Pegging 2010 U.S. retail sales at $18.4 billion and projecting steady growth through 2015, 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 SymphonyIRI. It also charts market size and marketer share figures for the natural supermarket channel, using SPINSscan sales tracking data. In sum, ***Pet Food in the U.S., 9th 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 customized cross tabulations of Experian Simmons consumer survey data; exclusive data from Packaged Facts' own quarterly pet owners; and data shared with Packaged Facts by the American Pet Products Association (APPA). Dozens of images of pet food and treat products and consumer and trade ads are included.

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Contents

CHAPTER 1: EXECUTIVE SUMMARY

Introduction

Scope of Report

Report Methodology

Market Size and Growth

U.S. Pet Food Retail Sales, 2006-2015

Mass-Market Dollar Sales Flat, Volume Sales Down

Dog Food Inches Up to $3.7 Billion

Cat Food Stalls at $2.4 Billion

Non-Dog/Cat Food Declines to $243 Million

Market Share by Retail Channel

Competitive Overview

Del Monte and P&G Shake It Up

Top Five Players Control Four-Fifths of Market

Four Companies Dominate Mass-Market Sales

Pet Specialty Channel Leaders

Natural/Organic Specialists

Natural Branching Out

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Focus on Private Label

Marketing and New Product Trends

Pet Market Advertising Expenditures

Pet Food “SuperBrands”

Advertising Positioned on Human Animal Bond, Health, Flavor

Pet Food Launches Peak in 2010

New Product Trends

The Ingredients Thrust

Retail Channel Trends

Channel Trends

Figure 1-1: Household Purchasing of Pet Products by Retail Channel or Pet Superstore Chain, 2010 (percent of U.S. households with pets)

The Big Two: PetSmart and Petco Continue to Advance

Other Top-Ranked Pet Specialty Chains

Independent Pet Stores Under Pressure

Walmart and Target Bullish on Pet Supplies

Online Selling

Pet Consumer Trends

61 Million Households Own Pets

61% of Pet Households Keep More Than One Pet

80% Buy Dog Biscuits/Treats

Milk-Bone Is Most Widely Used Brand Line

Canned Food Is Stronger in Cat Arena

Friskies Is Most Widely Used Cat Food Brand Line

CHAPTER 2: MARKET OVERVIEW

Introduction

The Animal Categories: Dog, Cat, Other

Terminology

Exclusions

Other Marketing Classifications

Market Size and Growth

U.S. Pet Food Retail Sales, 2006-2010

Table 2-1: U.S. Retail Sales of Pet Food: 2006-2010 (in millions of dollars)

Mass-Market Dollar Sales Flat, Volume Sales Down

Table 2-2: SymphonyIRI-Tracked Dollar and Volume Sales of Pet Food: Overall and by Category and Segment, 2010 vs. 2009 (in millions of dollars)

Dog Food Inches Up to $3.7 Billion

Cat Food Stalls at $2.4 Billion

Non-Dog/Cat Food Declines to $243 Million

Dog Food the Strongest Contributor to Mass-Market Growth

Back-story: Mass-market Sales Chart Steady Growth

Pet Food Sales Trends in Natural Supermarkets

Table 2-3a: Retail Dollar Sales of Pet Food in the Natural Supermarket Channel by Type (Dog Food, Cat Food, Other Pet Food, Treats), 2009 vs. 2010 (in millions of dollars)

Table 2-3b: Share of Retail Dollar Sales of Pet Food in the Natural Supermarket Channel by Type (Dog Food, Cat Food, Other Pet Food, Treats), 2009 vs. 2010 (percent)

Market Composition

Premium vs. Regular vs. Value Foods

Dog Food vs. Cat Food

Table 2-4: Share of U.S. Retail Sales of Pet Food by Price Category: Premium (Mass Premium and Superpremium), Regular, Value, Treats: Dog Food, Cat Food, Total, 2008-2010 (percent)

Table 2-5: Share of SymphonyIRI-Tracked Retail Dollar Sales of Pet Food by Category: 2009 vs. 2010 (percent)

Dog and Cat Treats on the Ups

Pet Food Sales by Form: Dry Tops List

Table 2-6: Share of SymphonyIRI-Tracked Sales of Dog and Cat Food by Form: 2009 vs. 2010 (percent)

Table 2-7: Share of SymphonyIRI-Tracked Sales of Pet Food by Form: 2009 vs. 2010 (percent)

Natural and Organic Pet Food Sales

Table 2-8: U.S. Retail Sales of Natural Pet Food: 2005, 2009 and 2014 (in millions of dollars)

Independent Pet Store Sales by Animal Type

Table 2-9: Share of Independent Pet Store Supply Retail Dollar Sales by Animal Type: 2007-2009 (percent)

Food and Treats Share of Sales in Independent Pet Stores by Animal Type

Table 2-10: Share of Retail Dollar Sales of Pet Edibles vs. Pet Non-Edible Supplies, by Animal Type in Independent Pet Stores: 2007-2009 (percent)

Dog Food Remains Largest Category in Pet Specialty Stores

Table 2-11: Share of Pet Specialty Retailer Dollar Sales by Category: 2007-2009 (percent)

Market Share by Retail Channel

Table 2-12: Share of U.S. Pet Food Sales by Retail Outlet Type: 2010 (percent)

Market Outlook

Shoppers, Retailers Adapting to “New Normal”

Economic Downturn and Recovery

Pet Market Not Immune to Recession

Figure 2-1: Level of Agreement with Statement “I Am Spending Less on Pet Products These Days Because of the Economy,” 2010 (percent of U.S. pet owners)

Table 2-13: Economic Outlook of U.S. Pet Owners: Now vs. Last 12 Months (percent)

Table 2-14: SymphonyIRI-Tracked Sales of Pet Products by Food and Non-Food Category, 2010 vs. 2009 (in millions of dollars and pounds)

Table 2-15: Economic Outlook of U.S. Pet Owners: Now vs. Next 12 Months (percent)

Figure 2-2: Level of Agreement with Statement “I Anticipate Spending More on Pet Products Over the Next 12 Months,” 2010 (percent of U.S. pet owners)

Human/Animal Bond and “Functional Pampering”

Figure 2-3: “Consider My Pet(s) Part of the Family,” 2009 (percent of pet, dog/cat, dog and cat owners)

Functional Pet Foods Continue to Advance

Table 2-16: Kind of Dog or Cat Food Purchased in the Past 12 Months: 2004, 2006 and 2008 (percent)

Table 2-17: Use of Special-Purpose Nutritional Formula Pet Food and Treats vs. Pet Supplements: Dog Owners, 2010 (percent)

Table 2-18: Use of Special-Purpose Nutritional Formula Pet Food and Treats vs. Pet Supplements: Cat Owners, 2010 (percent)

Aging Pet Population

Figure 2-4: Percentage of Dogs and Cats Age 6 and Over: 1996 vs. 2006 (percent)

Pet Overweight, Obesity

Table 2-19: Percentage and Number of Overweight and Obese Dogs and Cats, 2009

Sales of Senior, Weight Management, and Special Needs Products Strong Across Multiple Categories

Table 2-20: U.S. Retail Sales of Senior, Weight Management, and Special Needs Pet Products: 2004, 2008 and 2013 (in millions of dollars)

The Natural Wave

Figure 2-5: Level of Agreement with Statements “If Natural/Organic Pet Products Were More Affordable / More Available Where I Shop, I Would Buy

Them More Often," 2010 (percent of U.S. pet owners)

"Natural" Growing as Share of Pet Food Entries

Growth in Pet Ownership Slows with Economy

Table 2-21: Household Penetration Rates for Selected Dog- or Cat-Owning Classifications: 2005 vs. 2010 (percent of U.S. households)

Table 2-22: Household Penetration Rates for Selected Pet-Owning Classifications, 2007-2010 (percent of and number of U.S. households in millions)

More Pets than People

Table 2-23: Number of Pets in the United States by Type: 2000, 2002, 2004, 2006 and 2008 (number in millions and percent)

Impact of Boomers and Graying Population

Table 2-24: Household Penetration Rates for Selected Pet-Owning Classifications: By Generational Cohort, 2010 (percent of U.S. households)

Table 2-25: Household Populations for Selected Pet-Owning Classifications: By Generational Cohort, 2010 (number of U.S. households in millions)

Table 2-26: Indexes for Selected Pet-Owning Classifications: By Generational Cohort, 2010 (U.S. households)

Table 2-27: Indexes for Dog or Cat Ownership: By Age Cohort, 2005 vs. 2010 (U.S. households)

Table 2-28: Number and Share of Total U.S. Population Growth for Selected Age Brackets: 2010, 2015 and 2020 (in thousands of number and percent)

Role of Gen Xers and Gen Ys

High-Income Demographics

Table 2-29: Change in Pet Market Consumer Base: Household Income $60K or More vs. Household Income Under $60K, 2005 vs. 2010 (U.S. dog- or cat-owning households)

Figure 2-6: $70K+ Household Share of U.S. Pet Market Expenditures: By Category, 1999 vs. 2009 (percent)

Figure 2-7: $70K+ Household Share of U.S. Pet Food Market Expenditures, 1999-2009 (percent)

Internet Trends

Table 2-30: Level of Pet Owner Agreement with Statement: “I Use the Internet to Help Find and Choose Pet Products,” February 2010 (percent)

Table 2-31: Level of Pet Owner Agreement with Statement: “I Buy Pet Products Online,” February 2010 (percent)

Table 2-32: Selected Internet-Related Psychographics: Adults Overall vs. Dog or Cat Owners, 2010 (percent and index)

Product Safety Issue a Dual-Edged Sword

Looking Ahead

Sales Growth Through 2015

Table 2-33: Projected U.S. Retail Sales of Pet Food: 2010-2015 (in millions of dollars)

Moderation

Table 2-34: Level of Agreement with Statement “I Am Spending Less on Pet Products These Days Because of the Economy”: Dog Owners and Cat Owners Overall vs. Natural Dog Food/Supply Purchasers and Natural Cat Food/Supply Purchasers, 2010 (percent of U.S. pet owners)

Power Segments

Value

Competitive Overview

Del Monte and P&G Shake It Up

Del Monte Acquired by Investors

Simmons Acquires Menu Foods

Procter & Gamble Acquires Natura

Nestlé Purina Acquires Waggin' Train

Dad's Restructures Under Ainsworth Parent

Freshpet Aligns with Tyson

Private Equity Firms Continue to Invest

Possible Future Acquisitions Targets

Top Five Players Control Four-Fifths of Market

Table 2-35: Top Five U.S. Marketers of Pet Food: 2006, 2008 and 2010 (percent)

Four Companies Dominate Mass-Market Sales

Table 2-36: Top Marketers of Pet Food by Share of SymphonyIRI-Tracked Sales: 2009 vs. 2010 (percent)

Table 2-37: Leading Marketers of Dog and Cat Food: Share of SymphonyIRI-tracked Sales by Product Type: 2009 vs. 2010 (percent)

Pet Specialty Channel Leaders

Table 2-38: Pet Food Marketer/Brand Leaders by Percentage of Stores Citing Brand as No.1 Seller: By Animal Type, 2005-2009 (percent)

Natural/Organic Specialists

SPINSscan Brand Leaders in Natural Supermarkets

Table 2-39: Top 10 Brands and Marketers of Pet Products in the Natural Supermarket Channel, 2009 vs. 2010 (retail sales in millions of dollars)

Natural Branching Out

Illustration 2-1: Milk-Bone 100% Natural Snacks

Marketers Tapping Natural Hit Speed Bumps

Veterinary Diet Marketers

Channel-Specific Marketing

Mars Limits Greenies Distribution

Mars Pulls Plug on WholeMeals

Raw Pet Food Market Leaders

Freshpet/Tyson Building Out Refrigerated Pet Food

Illustration 2-2: Trade Ad — Freshpet Food and Refrigerator Case

Crossing Pet Market Lines

Iams Testing Pure-Play Supplement Waters

Illustration 2-3: Advertising for Nestlé Purina's FortiFlora Supplement

Purina Licenses Name into Toys, Other Non-Food Categories

PurinaCare Pet Insurance

Focus on Private Label

Table 2-40: SymphonyIRI-Tracked Dollar and Volume Sales of Private-Label Pet Food: 2010 vs. 2009 (in millions of dollars and pounds)

Table 2-41: Private-Label Share of SymphonyIRI-Tracked Sales of Pet Food: By Product Category and Segment, 2009 vs. 2010 (percent)

Independents Also Playing the Store-Brand Game

Table 2-42: Purchasing Patterns for Selected Types of Store-Brand Dog and Cat Food: By Retail Channel Shopped, 2008 vs. 2010 (percent)

Table 2-43: Number of U.S. Private-Label Pet Food Product Introductions and SKUs: By Category, 2000-2010

Illustration 2-4: Target's Boots & Barkley Multi-Flavored Dog Biscuits; Wegman's Bruiser Complete Nutrition Dry Dog Food

Marketing and New Product Trends

Pet Market Advertising Expenditures

Pet Food "SuperBrands"

Advertising Positioned on Human Animal Bond, Health, Flavor

Cause-Related Marketing, Public Relations

Illustration 2-5: Purina One Consumer Print Ad featuring One Hope Network Cause

Online Media and Mobile Apps

Illustration 2-6: Nestlé Purina and AnimalPlanet.com's "Small & In Charge" Webisode

Sustainable Initiatives

Pet Food Launches Peak in 2010

Table 2-44: Number of New Pet Food Product Introductions: 2001-2010

New Product Trends

Table 2-45: Pet Food Product Selling Points by Package Tag/Marketing Claim: 2008-2010 (number)

The Ingredients Thrust

Real Meat, No Byproducts or Fillers

Illustration 2-7: Consumer Print Ad for Blue Buffalo Pet Food

Grain-Free

Table 2-46: Number of New Grain-Free Pet Food Products: Reports and SKUs, 2007-2010

Whole Fruits and Vegetables

Human-Grade

USA-Sourced

Functional/Special Diet

Illustration 2-8: Mars' Pedigree Plus Healthy Immunity Wet Dog Food

Weight Control a Growing Focus

Preportioned Servings

Illustration 2-9: Purina Beneful IncrediBites Dry Dog Food for Small Dogs

Custom Foods

Table 2-47: The U.S. Pet Food Market: Selected Leading Marketers and Brands, 2010

Retail Channel Trends

Channel Trends

Figure 2-8: Household Purchasing of Pet Products by Retail Channel or Pet Superstore Chain, 2010 (percent of U.S. households with pets)

Table 2-48: Household Purchasing of Pet Products by Retail Channel or Pet Superstore Chain: Total Purchasers and Sole Purchasers, 2008-2010 (percent of U.S. households with pets)

The Big Two: PetSmart and Petco Continue to Advance

Table 2-49: PetSmart and Petco Combined Sales: 2001-2010 (in millions of dollars)

Other Top-Ranked Pet Specialty Chains

Company Profile: PetSmart, Inc.

Table 2-50: PetSmart Sales: 2000-2010 (in millions of dollars)

Expansion, Growth Despite Down Economy

Table 2-51: Number of PetSmart Stores in Operation, 2000-2010

Martha Stewart Line Debuts as PetSmart Exclusive

Compelling Products and Services

Customer Rewards: Cornerstone of Marketing Efforts

Company Profile: Petco Animal Supplies, Inc.

Table 2-52: Petco Annual Sales: 2000-2010 (in millions of dollars)

Changes and Challenges

Table 2-53: Number of Petco Stores in Operation, 2000-2010

Petco Tests “Unleashed” Concept

Focus on Nutrition

Marketing and PR

Petco Goes Wireless

Independent Pet Stores Under Pressure

Table 2-54: Top Challenges Pet Specialty Retailers Face in Next Two Years: 2008-2009, 2009-2010, 2010-2011 (percent)

Table 2-55: Pet Specialty Retailer Average Gross Dollar Volume: 2001-2009 (in dollars)

Increasing Competition from Mass, Pet Superstores

Survival of the Industry

Walmart Bullish on Pet Supplies

Target Also Building Pet Department

Supermarkets in the Middle

Online Selling

Pet Consumer Trends

Methodology

61 Million Households Own Pets

Table 2-56: Pet Ownership in the United States, 2010 (percent and number of U.S. households)

Dual Ownership of Dogs and Cats Trends Downward

Table 2-57: Dog and Cat Ownership in the United States: 2006, 2008 and 2010 (percent and number of U.S. households)

34% of Pet Households Keep Multiple Types

Figure 2-9: Ownership of Multiple Types of Pets, 2010 (percent of pet-owning U.S. households)

Across-the-Board Dip in Ownership of Multiple Types of Pets

Table 2-58: Multiple Pet Ownership in the United States, 2006 vs. 2010 (percent of pet-owning households)

61% of Pet Households Keep More Than One Pet

Bucking Trend, Ownership of Multiple Dogs Is on the Rise

Table 2-59: Ownership of Multiple Pets of a Single Type, 2010 (percent and number of U.S. households who keep pets of a given type)

Table 2-60: Ownership of Multiple Pets of a Single Type, 2006 vs. 2010 (percent of U.S. households who keep pets of a given type)

Pet Specialty Climbs to Top by Overall Channel Usage Rates

Table 2-61: Household Purchasing of Pet Products by Retail Channel: Total Purchasers and Sole Purchasers, 2006 vs. 2010 (percent of U.S. households with pets)

Organic Pet Food and Channel Choices

Table 2-62: Purchasing Rates for Organic Pet Food by Channel Shopped for Pet Products, 2010 (percent of U.S. households with pets)

The Pet Food Coupon Clipper

Table 2-63: Coupon Usage Rates by Type Among Pet Owners, 2010 (percent and index among U.S. pet-owning households)

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CHAPTER 3: DOG FOOD

Introduction

Five Product Segments

Market Size and Growth

Total Dog Food Retail Sales, 2005-2015

Table 3-1: U.S. Retail Sales of Dog Food: 2006-2015 (in millions of dollars)

SymphonyIRI-Tracked Dollar and Volume Sales of Dog Food

Table 3-2: SymphonyIRI-Tracked Dollar and Volume Sales of Dog Food by Category: 2010 vs. 2009 (in millions of dollars and pounds)

Table 3-3: Share of SymphonyIRI-Tracked Sales of Dog Food by Segment: 2010 (percent)

Table 3-4: SymphonyIRI-Tracked Sales of Dog Food: 2006-2010 Compound Annual Growth Rates by Segment (percent)

Premium and Fortified Dog Foods Are Most Commonly Purchased Kinds

Table 3-5: Kind of Dog Food Purchased in the Past 12 Months: 2004, 2006 and 2008 (percent)

Table 3-6: Use of Specially Formulated Dog Food: 2004, 2006 and 2008 (percent)

Marketer and Brand Shares

Methodology

Acquisitions, Other Deals Affecting Competition in 2011

Nestlé Purina Dominates Dog Food Category

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Table 3-7: Top Dog Food Marketers by Share of SymphonyIRI-Tracked Sales of Dog Food and Total Pet Food, 2009-2010 (percent)

Three of Five Top Dog Food Marketers Rely Most on Dry Form

Table 3-8: Share of Top Dog Food Marketers' SymphonyIRITracked Sales by Product Form, 2009-2010 (percent)

Nestlé Purina Leads Dry Dog Food Segment

Mars Moves Greenies to Specialty Circuit

Mars Maintains Pinnacle Position in Wet Dog Food

Semi-Moist Segment Dominated by Nestlé

Freshpet Turns up Heat in Frozen/Refrigerated Dog Food

Top Dog Food Products

Pet Specialty Channel Marketer/Brand Dog Food Leaders

Table 3-9: Marketers and Brands of Dry Dog Food by SymphonyIRI-Tracked Sales and Market Share: 2009 vs. 2010 (in millions of dollars and percent)

Table 3-10: Marketer and Brands of Dog Biscuits/Treats by SymphonyIRI-Tracked Sales and Market Share: 2009 vs. 2010 (in millions of dollars and percent)

Table 3-11: Marketer and Brands of Wet Dog Food by SymphonyIRI-Tracked Sales and Market Share: 2009 vs. 2010 (in millions of dollars and percent)

Table 3-12: Marketer and Brands of Semi-Moist Dog Food by SymphonyIRI-Tracked Sales and Market Share: 2009 vs. 2010 (in millions of dollars and percent)

Table 3-13: Marketer and Brands of Frozen/Refrigerated Dog Food by SymphonyIRI-Tracked Sales and Market Share: 2009 vs. 2010 (in millions of dollars and percent)

Table 3-14: Top Dog Food Products by Dollar Gain in SymphonyIRI-Tracked Sales: 2009 vs. 2010 (in millions of dollars)

Table 3-15: Dog Food Marketer/Brand Leaders by Percentage of Stores Citing Brand as No.1 Seller: 2005-2009 (percent)

Marketing and New Product Trends

Dog Food Advertising Expenditures

Meaningful Marketing in the Dog Food Sphere

Social Media Do-Gooding

Dog Food Introductions Continue Upward

Table 3-16: Number of New Dog Food Introductions, 2002-2010

Natural, Functional and Special Diet Foods

Table 3-17: Dog Food Product Introductions: Top 25 Selling Points by Package Tags/Marketing Claims, 2008-2010 (number)

Spotlight on Ingredients

Meat First

Illustration 3-1: Nestlé Purina Consumer Print Ad for Purina One SmartBlend

Fruits & Veggies

Limited Ingredients

Illustration 3-2: Ainsworth Pet Nutrition’s Rachael Ray Nutrish Just 6 Dog Treats

Human Grade

Gourmet

Illustration 3-3: Nestlé Purina's Chef Michael's Canine Creations

Grain-Free Foods and Treats

Ancestral Diets

Natural Branches Out

Organic

Holistic

Illustration 3-4: Eagle Pet Products' Holistic Select Dog Food

Natural Plus Gourmet

Functional and Special Diet Foods and Treats

Senior Support

Illustration 3-5: Mars/Nutro—Greenies JointCare Treats with Green-Lipped Mussel

Healthy Weight

Illustration 3-6: Hills' Science Diet Weight Loss System for Dogs

Illustration 3-7: PetAg—Dog Slim Weight Maintenance Treats

Probiotics, Probiotics and Healthy Digestion

Size- and Breed-Specific Products

Illustration 3-8: Mars' Cesar Canine Cuisine Treats for Dogs

Seasonal Pet Food

Customized Food

Illustration 3-9: SmartPak's Proportions Canine Nutritional Meals

Raw/Frozen Foods Focus on Convenience

"People Food"

Treats Trends

Illustration 3-10: VetScience LLC's Fruitables Dog Treats

Nutraceutical Treats

Oral Care Treats

Frozen Treats Getting Functional

Fortified Dog Water/Beverages

Baked Treats

Illustration 3-11: Three Dog Bakery's Bake to Nature Dog Treats

Grain-Free Treats

Examples of Dog Food Advertising

Illustration 3-12: Pedigree+ Consumer Print Ads

Emphasis: Immunity/Joint Health

Illustration 3-13: Pedigree Trade Print Ad and TV Commercial

Emphasis: Dental Health

Illustration 3-14: Blue Buffalo Consumer Print Ad

Emphasis: Value/Nutrient Comparison/Health

Illustration 3-15: Royal Canin Puppy Food - Consumer Print Ad

Emphasis: Lifestage-and-Size-Specific

Illustration 3-16: Hill's Trade Print Ad

Emphasis: Nutrition as Medicine

Illustration 3-17: Hill's Trade Print Ad

Emphasis: Weight Reduction

Illustration 3-18: Eukanuba Consumer Print Ad

Emphasis: Company Heritage

Illustration 3-19: Sergeant's Trade Print Ad

Emphasis: Variety/Social Media Incentive

Dog Ownership Trends and Demographics

Methodology

41 Million Households Keep Pet Dogs

Multiple Dog Ownership on the Rise

Figure 3-1: Dog Ownership in the United States, 2010 (percent of U.S. households)

Table 3-18: Dog Ownership in the United States: 2006, 2008 and 2010 (percent and number of U.S. Households)

Dog Household Demographics

Table 3-19: Demographics for Keeping Pet Dogs, 2010 (percent, number and index among U.S. households)

Dogs and the City

Figure 3-2: Top 25 Metro Area Share of Total U.S. Households vs. Total Dog-Owning Households, Fall 2007 through Summer 2010 (percent)

Boomers, Seniors Are Keeping Pet Dogs at Higher Rates

Table 3-20: Dog Ownership Rates by Age 40+ Brackets: 2003 vs. 2010 (percent of U.S. households)

Keepers of the Pack: Multiple-Dog Demographics

Table 3-21: Demographic Overview for Selected Dog-Owning Classifications, 2010 (percent and index of U.S. households)

Retail Purchasing Patterns

“Other” Channels Grab Substantial Share Gains

Table 3-22: Dog Owner Shopping for Pet Products by Retail Channel or Pet Superstore Chain: Total Purchasers and Sole Purchasers, 2008-2010 (percent of U.S. dog-owning households)

Demographic Patterns by Retail Channel

Table 3-23: Pet Product Shopping Rates Among Dog Owners by Retail Channel, 2010 (percent of U.S. dog-owning households)

Table 3-24: Pet Product Shopping Indexes Among Dog Owners by Retail Channel, 2010 (indexes for U.S. dogowning households)

Dog Food Purchasing Trends

80% Buy Dog Biscuits/Treats

Figure 3-3: Dog Food Purchasing Rates by Type, 2005 vs. 2010 (percent of U.S. dog-owing households)

Table 3-25: Dog Food Cross-Purchasing Rates by Type, 2010 (percent of U.S. dog-owning households)

Minority, Lower Income Skews for Canned/Wet Dog Foods

Lifestage Dry/Canned Food Formulations Slip in Usage

Table 3-26: Demographic Overview of Dog Food Purchasing by Type: Dry, Canned/Wet, and Treats/Snacks, 2010 (percent of U.S. dog-owning households)

Table 3-27: Dog Food Purchasing Patterns by Type, 2005 vs. 2010 (percent of U.S. dog-owing households)

Single- vs. Multiple-Pet Patterns by Dog Food Type

Table 3-28: Dog Food Purchasing Patterns by Type: Single vs. Multiple Dog Owners, 2010 (percent and index)

Milk-Bone Is Most Widely Used Brand Line

Figure 3-4: Top Dog Food/Treat Brand Lines by Overall Usage Rates, 2010 (percent of U.S. dog-owing households)

Indulgent Treats Skew to Single-Dog Owners

Table 3-29: Purchasing Patterns for Leading Dog Food/Treat Brand Lines: Single vs. Multiple Dog Owners, 2010 (percent and index)

Independent Pet Stores Are Partial Exception to Cross-Channel Shopping Patterns

Table 3-30: Purchasing Patterns for Leading Dog Food/Treat Brand Lines: By Retail Channel Shopped, 2010 (percent)

CHAPTER 4: CAT FOOD

Introduction

Market Size and Composition

Total Cat Food Retail Sales, 2005-2015

Table 4-1: U.S. Retail Sales of Cat Food: 2006-2015 (in millions of dollars)

SymphonyIRI-Tracked Dollar and Volume Sales

Table 4-2: SymphonyIRI -Tracked Dollar and Volume Sales of Cat Food: 2010 vs. 2009 (in millions of dollars and pounds)

Table 4-3: Share of SymphonyIRI-Tracked Sales of Cat Food by Segment: 2010 (percent)

Table 4-4: SymphonyIRI-Tracked Sales of Cat Food: 2006-2010 Compound Annual Growth Rates by Segment (percent)

Fortified, Premium, Indoor and Hairball Are Most Commonly Purchased Types

Table 4-5: Kind of Cat Food Purchased in Past 12 Months: 2004, 2006 and 2008 (percent)

Table 4-6: Use of Specially Formulated Cat Food: 2004, 2006 and 2008 (percent)

Marketer and Brand Shares

Methodology

Acquisitions, Other Deals Affecting Competition in 2011

Nestlé Purina No. 1 in Cat Food Category

Table 4-7: Top Cat Food Marketers by Share of SymphonyIRITracked Sales of Cat Food and Total Pet Food,

2009-2010 (percent)

Iams the Most Heavily Leveraged in Dry Cat Food

Table 4-8: Share of Top Cat Food Marketers' SymphonyIRITracked Sales by Product Form, 2009-2010 (percent)

Nestlé Purina Has Lion's Share of Dry Cat Food

Nestlé Purina Remains on Top in Wet Cat Food

Mars on Top in Cat Treats

Freshpet Births Refrigerated Cat Food Segment

Semi-moist Cat Food = Private Label

Top Cat Food Products

Pet Specialty Channel Marketer/Brand Cat Food Leaders

Table 4-9: Marketers and Brands of Dry Cat Food by SymphonyIRI-Tracked Sales and Market Share: 2009 vs. 2010 (in millions of dollars and percent)

Table 4-10

Marketers and Brands of Wet Cat Food by SymphonyIRITracked Sales and Market Share: 2009 vs. 2010 (in millions of dollars and percent)

Table 4-11: Marketers and Brands of Cat Treats by SymphonyIRI-Tracked Sales and Market Share: 2009 vs. 2010 (in millions of dollars and percent)

Table 4-12: Marketers and Brands of Frozen/Refrigerated Cat Food by SymphonyIRI-Tracked Sales and Market Share: 2009 vs. 2010 (in millions of dollars and percent)

Table 4-13: Top Cat Food Products by Dollar Gain in SymphonyIRI-Tracked Sales: 2009 vs. 2010 (in millions of dollars)

Table 4-14: Cat Food Marketer/Brand Leaders in the Pet Specialty Channel by Percentage of Stores Citing Brand as No.1 Seller: 2005-2009

Marketing and New Product Trends

Cat Food Advertising Expenditures

Creative Tactics in Cat Food Promotion

Cat Food New Product Introductions Seesaw

Table 4-15: Number of New Cat Food Introductions, 2002-2010

Natural on Top

Table 4-16: New Cat Food Product Introductions: Top 25 Selling Points by Package Tags/Marketing Claims, 2008-2010 (number)

Illustration 4-1: Nestlé Purina's Healthful Life Dry Cat Food

Grain-Free/Allergy Free

Illustration 4-2: Natural Balance's Alpha Grain-Free Cat Food

Functional and Special Diet Products

Illustration 4-3: Iams' ProActive Health Dry Cat Food with PreBiotics

Indoor and Hairball Formulas

Illustration 4-4: Nestlé Purina's 9 Lives Indoor Complete

Nulo Cat Food Comes with Weight-Loss Plan

Illustration 4-5: Nulo's SimplyFit Dry Cat Food; Dogswell's Catswell Shape Up Treats

Digestive/Immune System

Healthy Skin and Coat

Kitten Formulas

Gourmet-Style, Variety Still Key Appeals

Illustration 4-6: Nestlé Purina's Fancy Feast Appetizers for Cats

Packaging Perks

Illustration 4-7: Robbie Dawg's Organic Baked Kitty Treats

Treats

Natural

Illustration 4-8: Castor & Pollux's Organix Cat Treats

Functional

Illustration 4-9: Breeder's Choice Active Care Healthy Joint Treats

Indulgence and Fun

Illustration 4-10: Nestlé Purina's Friskies Party Mix Cat Treats - Cheezy Craze Crunch

Examples of Cat Food Advertising

Illustration 4-11: Iams Premium Protection Consumer Print Ad

Emphasis: Nutritional Health / Developed by Veterinarians

Illustration 4-12: Nestlé Purina Friskies TV Spot

Emphasis: Taste Adventure

Illustration 4-13: Hill's Trade Print Ad and Web "Product Selector"

Emphasis: Flavor/Humanization

Illustration 4-14: Whiskas TV Spot

Emphasis: Animal-Human Bond/Lifestyle

Illustration 4-15: PetAg Trade Print Ad

Emphasis: Functional/Age-Specific

Illustration 4-16: American Foods Group Trade Print Ad

Emphasis: Human-Grade Ingredients

Cat Ownership Trends and Demographics

Methodology

28 Million Households Keep Pet Cats

Multiple Cat Household Numbers Edge Downward

Figure 4-1: Cat Ownership in the United States, 2010 (percent and number of U.S. households)

Table 4-17: Cat Ownership in the United States: 2006, 2008 and 2010 (percent and number of U.S. Households)

Age Profile of Cat Owners Gets Older

Patterns by Number of Cats Owned

Table 4-18: Demographics for Keeping Pet Cats, 2010 (percent, number and index among U.S. households)

Demographics for Keeping Pet Cats, 2010 (percent, number and index among U.S. households)

Demographics for Keeping Pet Cats, 2010 (percent, number and index among U.S. households)

Table 4-19: Demographic Overview by Number of Cats Owned, 2010 (percent and index of U.S. households)

Retail Purchasing Patterns

53% of Cat Owners Shop Supermarkets for Pet Products

Table 4-20: Cat Owner Shopping for Pet Products by Retail Channel or Pet Superstore Chain: Total Purchasers and Sole Purchasers, 2008-2010 (percent of U.S. cat-owning households)

Demographic Patterns by Retail Channel

Table 4-21: Pet Product Shopping Rates Among Cat Owners by Retail Channel, 2010 (percent of U.S. cat-owning households)

Table 4-22: Pet Product Shopping Indexes Among Cat Owners by Retail Channel, 2010 (indexes for U.S. catowning households)

Cat Food Purchasing Patterns

Canned Food Is Stronger in Cat Arena

Figure 4-2: Cat Food Purchasing Rates by Type, 2005 vs. 2010 (percent of U.S. cat-owing households)

Table 4-23: Cat Food Cross-Purchasing Rates by Type,

2010 (percent of U.S. cat-owning households)

Demographics by Type of Cat Food

Table 4-24: Demographic Overview of Cat Food Purchasing by Type: Dry, Canned/Wet, and Treats/Snacks, 2010 (percent and index of U.S. cat-owning households)

Uptick in Canned Cat Food Positioning

Table 4-25: Cat Food Purchasing Patterns by Type: 2005 vs. 2010 (percent of U.S. cat-owing households)

Multiple Cat, Independent Store Skews to Canned/Wet Food

Table 4-26: Cat Food Purchasing Patterns by Type: Single vs. Multiple Cat Owners, 2010 (percent and index)

Table 4-27: Cat Food Purchasing Rates by Type: By Retail Channels Shopped, 2010 (percent of U.S. cat-owning households)

Friskies Is Most Widely Used Brand Line

Figure 4-3: Top Cat Food/Treat Brand Lines by Overall Usage Rates, 2010 (percent of U.S. cat-owing households)

Highest Skews Are for Multiple-Cat Fanciers

Table 4-28: Purchasing Patterns for Leading Cat Food/Treat Brand Lines: Single vs. Multiple Cat Owners, 2010 (percent and index)

Table 4-29: Purchasing Patterns for Leading Cat Food/Treat Brand Lines: By Retail Channel Shopped, 2010 (percent)

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CHAPTER 5: OTHER (NON-DOG/CAT) PET FOOD

Introduction

Category Scope

Market Size and Growth

Other Pet Food Sales, 2006-2010

Table 5-1: U.S. Retail Sales of Other Pet Food: 2006-2015 (in millions of dollars)

Figure 5-1: Share of Sales of Other Pet Food by Animal Type: 2008 vs. 2010 (percent)

2010 SymphonyIRI-Tracked Dollar and Unit Sales

Table 5-2: SymphonyIRI-Tracked Dollar and Unit Sales of Other Pet Food: 2010 vs. 2009 (in millions of dollars and units)

Historical Growth

Independent Pet Stores: Share of Sales by Animal Type

Table 5-3: Share of Independent Pet Store Sales by Animal Type: 2007-2009 (percent)

Fish Products: Share of Sales by Category

Bird Products: Share of Sales by Category

Table 5-4: Share of Independent Pet Store Sales of Fish Products by Category: 2007-2009 (percent)

Table 5-5: Share of Independent Pet Store Sales of Bird Products by Category: 2007-2009 (percent)

Herptile Products: Share of Sales by Category

Table 5-6: Share of Independent Pet Store Sales of Herptile Products by Category: 2007-2010 (percent)

Small Mammal Products: Share of Sales by Category

Table 5-7: Share of Independent Pet Store Sales of Small Mammal Products by Category: 2007-2010 (percent)

Share of Other Pet Food Sales by Retail Channel

Figure 5-2: Share of U.S. Other Pet Food Sales by Retail Outlet Type: 2010 (percent)

Competitive Trends

Marketer Overview

Central Garden & Pet on Top in SymphonyIRI-Tracked Outlets

Table 5-8: Marketers and Brands of Other Pet Food by SymphonyIRI-Tracked Sales and Market Share: 2009 vs. 2010 (in millions of dollars and percent)

Central Garden & Pet Posts Biggest Dollar Gains

Table 5-9: Top Ten Other Pet Food Products by Dollar Gain in SymphonyIRI-Tracked Sales: 2009 vs. 2010 (in millions of dollars)

Tetra and Wardley Control Fish/Herptile Segment

Leading Pet Specialty Channel Brands

Table 5-10: Marketers and Brands of Fish/Herptile Food by SymphonyIRI-Tracked Sales and Market Share: 2009 vs. 2010 (in millions of dollars and percent)

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Table 5-11: Other Pet Food Brand Leaders in Pet Specialty Stores: 2007, 2008 and 2009 (percent)

Marketing and New Product Trends

Overriding Trends

New Product Thrusts

Trends in Bird Food

Humanization

Bird Treats

Species-Specific

Trends in Small Animal Food

Species-Specific

Gourmet

Ingredient Sourcing

Trends in Fish Food

Functional Foods

Frozen and Eco-System-Specific

Species Specific

Trends in Herptile Food

Species-Specific

Live Food Innovations

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Gourmet

Table 5-12: Bird, Small Animal, Fish and Herptile Food: Selected New Product Introductions, January 2009 - January 2011

Examples of Other Pet Food Advertising

Illustration 5-1: Wardley Trade Ad

Emphasis: Dual Benefit

Illustration 5-2: Timberline Trade Print Ad

Emphasis: Lifestyle

Illustration 5-3: Hikari Trade Print Ad

Emphasis: Differentiation

Illustration 5-4: Kaytee Trade Print Ad

Emphasis: Nutritional Precision

Illustration 5-5: TetraPond Trade Print Ad

Emphasis: Premiumization/Lifestyle

Illustration 5-6: Oxbow Animal Health Trade Print Ad

Emphasis: Human-Animal Bond/Organic Ingredients

Illustration 5-7: Kaytee Trade Print Ad

Emphasis: Natural Ingredients / Eco-friendly Packaging

Illustration 5-8: Wild Delight Trade Print Ads

Emphasis: Gender/Charitable Tie-in

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Consumer Focus: Ownership of Pets Other than Dogs or Cats

Methodology

15 Million Households Own “Other” Pets

Table 5-13: Pet Ownership in the United States: Pets Other than Dogs or Cats, 2010 (percent and number of U.S. Households)

Table 5-14: Pet Ownership in the United States: Pets Other than Dogs or Cats, 2006, 2008, and 2010 (percent and number of U.S. Households)

Kids and “Other” Pets

Figure 5-3: Selected Indexes for Keeping Pet Dogs or Cats vs. Other Animals, 2010 (U.S. households)

Demographics for Keeping Pet Fish

Demographics for Keeping Pet Birds

Demographics for Keeping Pet Reptiles

Demographics for Keeping Pet Rabbits or Hamsters

Table 5-15: Demographics for Keeping Pets Other Than Dogs or Cats, 2010 (percent, number and index among U.S. households)

Table 5-16: Demographics for Keeping Pet Fish, 2010 (percent, number and index among U.S. households)

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Table 5-17: Demographics for Keeping Pet Birds, 2010 (percent, number and index among U.S. households)

Table 5-18: Demographics for Keeping Pet Reptiles, 2010 (percent, number and index among U.S. households)

Table 5-19: Demographics for Keeping Pet Rabbits and Hamsters, 2010 (percent, number and index among U.S. households)

Appendix: Addresses of Selected Marketers

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