

U.S. Pet Market Outlook, 2013-2014

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Abstracts

While the country has not yet completely emerged from its economic funk, the pet industry continues to chug along. Pet product shoppers were not immune to the Recession's effects, but the most recent Packaged Facts' proprietary Pet Owners Survey shows that they are becoming less price sensitive than in years past. And this trend is borne out in the sales data. Sales in mass channels such as grocery stores have been relatively flat, but pet owners have continued to migrate to pet specialty channels, which focus more on the high-end market. Another trend continuing to gain steam has been the pet industry's emphasis on natural products, as seen in M&A activity (e.g., Merrick acquiring Castor & Pollux and Del Monte acquiring Natural Balance) and the embrace by industry heavy hitters from Purina to Hill's Science Diet to Walmart.

Pet health has proven to be a particularly attractive category. As the pet population has aged, the interest by big players such as Bayer and Perrigo has increased. One deal that received considerable investor attention was Pfizer's spinoff of its animal health division, which it renamed Zoetis.

The industry has embarked on a number of initiatives to spur growth in pet ownership and some of those are beginning to pay dividends. These include programs such as the Human Animal Bond Research Initiative and the Pets in the Classroom initiative, which is introducing pet ownership to youth to encourage future ownership. Indeed, pet ownership among Gen Y jumped to its highest level in years in 2012.

The humanization of pets continues as a strong trend, with manufacturers and retailers introducing everything from human-style food to pet temporary tattoos. And the media is feeding the frenzy, giving pets their own TV channel and focusing on the outlandish things pet parents will do for them.

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In September 2012, the company committed completely to natural with the announcement that Hill's is reformulating its entire Science Diet line with natural ingredients. The new Better Life dog food formulas debuted in December 2012, followed soon after by the reformulated cat food line. As the name relays, in the past, Science Diet has primarily emphasized the science behind its products, backed by the pitch of being "Veterinarians' #1 choice to feed their own pets." But with the new natural line, the focus will be more on the consumer and the all-important human/animal bond. Commenting on the strategy, Hill's U.S. president Kostas Kontopoulos said, "...it's not only about the science. It's dedication to our mission to enrich and lengthen the special relationships between people and their pets that drives the development and continuous improvement of our pet foods. ... We took a food that already delivered precisely balanced nutrition, industry leading quality and great taste and will make it even better by adding the natural ingredients that pet parents want" (company press release, September 2012).

The new Science Diet dog and cat food formulas feature:

- Quality protein as the first ingredient
- Natural ingredients
- No chicken byproducts
- No artificial colors or flavors

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