

Pet Care in the US

April 2024

Table of Contents

EXECUTIVE SUMMARY

- Pet care in 2024: The big picture
- 2024 key trends
- Competitive landscape
- Retailing developments
- What next for pet care?

MARKET INDICATORS

Table 1 - Pet Populations 2019-2024

MARKET DATA

- Table 2 - Sales of Pet Food by Category: Volume 2019-2024
- Table 3 - Sales of Pet Care by Category: Value 2019-2024
- Table 4 - Sales of Pet Food by Category: % Volume Growth 2019-2024
- Table 5 - Sales of Pet Care by Category: % Value Growth 2019-2024
- Table 6 - NBO Company Shares of Pet Food: % Value 2019-2023
- Table 7 - LBN Brand Shares of Pet Food: % Value 2020-2023
- Table 8 - NBO Company Shares of Dog and Cat Food: % Value 2019-2023
- Table 9 - LBN Brand Shares of Dog and Cat Food: % Value 2020-2023
- Table 10 - Penetration of Private Label in Pet Care by Category: % Value 2019-2024
- Table 11 - Distribution of Pet Care by Format: % Value 2019-2024
- Table 12 - Distribution of Pet Care by Format and Category: % Value 2024
- Table 13 - Distribution of Dog and Cat Food by Format: % Value 2019-2024
- Table 14 - Distribution of Dog and Cat Food by Format and Category: % Value 2024
- Table 15 - Forecast Sales of Pet Food by Category: Volume 2024-2029
- Table 16 - Forecast Sales of Pet Care by Category: Value 2024-2029
- Table 17 - Forecast Sales of Pet Food by Category: % Volume Growth 2024-2029
- Table 18 - Forecast Sales of Pet Care by Category: % Value Growth 2024-2029

DISCLAIMER

SOURCES

Summary 1 - Research Sources

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Pet food manufacturers compete to meet shifting pet demographics
- Creative packaging trends account for feline demands and budget constraints
- Growth in the premium segment continues despite price increases

PROSPECTS AND OPPORTUNITIES

- Owner-centric claims vs biologically appropriate diets
- Greenwashing to push demand for more implicit sustainability claims
- Growing opportunity for cat treats and mixers

CATEGORY INDICATORS

- Table 19 - Cat Owning Households: % Analysis 2019-2024
- Table 20 - Cat Population 2019-2024
- Table 21 - Consumption of Cat Food by Prepared vs Non-prepared: % Analysis 2019-2024

CATEGORY DATA

Summary 2 - Cat Food by Price Band 2024

Table 22 - Sales of Cat Food by Category: Volume 2019-2024

Table 23 - Sales of Cat Food by Category: Value 2019-2024

Table 24 - Sales of Cat Food by Category: % Volume Growth 2019-2024

Table 25 - Sales of Cat Food by Category: % Value Growth 2019-2024

Table 26 - Sales of Dry Cat Food by Life-Cycle: % Value 2019-2024

Table 27 - Sales of Wet Cat Food by Life-Cycle: % Value 2019-2024

Table 28 - NBO Company Shares of Cat Food: % Value 2019-2023

Table 29 - LBN Brand Shares of Cat Food: % Value 2020-2023

Table 30 - LBN Brand Shares of Cat Treats and Mixers: % Value 2020-2023

Table 31 - Distribution of Cat Food by Format: % Value 2019-2024

Table 32 - Forecast Sales of Cat Food by Category: Volume 2024-2029

Table 33 - Forecast Sales of Cat Food by Category: Value 2024-2029

Table 34 - Forecast Sales of Cat Food by Category: % Volume Growth 2024-2029

Table 35 - Forecast Sales of Cat Food by Category: % Value Growth 2024-2029

Dog Food in the US

KEY DATA FINDINGS

2024 DEVELOPMENTS

The evolution of super premium dog food

Merging of price tiers: What is next for economy budgets?

Multi-use and occasionality as a growth strategy for meals and toppers

PROSPECTS AND OPPORTUNITIES

Premiumisation as a challenge to volume recovery

Growing focus on ageing pet nutrition

Biologically appropriate meals, and the growing challenge of weight management

CATEGORY INDICATORS

Table 36 - Dog Owning Households: % Analysis 2019-2024

Table 37 - Dog Population 2019-2024

Table 38 - Consumption of Dog Food by Prepared vs Non-prepared: % Analysis 2019-2024

CATEGORY DATA

Summary 3 - Dog Food by Price Band 2024

Table 39 - Sales of Dog Food by Category: Volume 2019-2024

Table 40 - Sales of Dog Food by Category: Value 2019-2024

Table 41 - Sales of Dog Food by Category: % Volume Growth 2019-2024

Table 42 - Sales of Dog Food by Category: % Value Growth 2019-2024

Table 43 - Sales of Dry Dog Food by Life-Cycle: % Value 2019-2024

Table 44 - Sales of Wet Dog Food by Life-Cycle: % Value 2019-2024

Table 45 - NBO Company Shares of Dog Food: % Value 2019-2023

Table 46 - LBN Brand Shares of Dog Food: % Value 2020-2023

Table 47 - LBN Brand Shares of Dog Treats and Mixers: % Value 2020-2023

Table 48 - Distribution of Dog Food by Format: % Value 2019-2024

Table 49 - Forecast Sales of Dog Food by Category: Volume 2024-2029

Table 50 - Forecast Sales of Dog Food by Category: Value 2024-2029

Table 51 - Forecast Sales of Dog Food by Category: % Volume Growth 2024-2029

Table 52 - Forecast Sales of Dog Food by Category: % Value Growth 2024-2029

Other Pet Food in the US

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Fish food struggles with volume recovery amidst shift to exotic aquatics
- Organic and natural trends in small mammal nutrition
- Barriers to ownership challenge bird food, although young consumers flock to creative alternatives, such as pigeons

PROSPECTS AND OPPORTUNITIES

- Urban living to increasingly challenge bird food
- Declining pet populations to challenge volume and value growth
- Premiumisation and snacking trends to continue pushing demand via e-commerce

CATEGORY INDICATORS

Table 53 - Other Pet Population 2019-2024

CATEGORY DATA

- Table 54 - Sales of Other Pet Food by Category: Volume 2019-2024
- Table 55 - Sales of Other Pet Food by Category: Value 2019-2024
- Table 56 - Sales of Other Pet Food by Category: % Volume Growth 2019-2024
- Table 57 - Sales of Other Pet Food by Category: % Value Growth 2019-2024
- Table 58 - LBN Brand Shares of Bird Food: % Value 2020-2023
- Table 59 - LBN Brand Shares of Fish Food: % Value 2020-2023
- Table 60 - LBN Brand Shares of Small Mammal/Reptile Food: % Value 2020-2023
- Table 61 - Distribution of Other Pet Food by Format: % Value 2019-2024
- Table 62 - Forecast Sales of Other Pet Food by Category: Volume 2024-2029
- Table 63 - Forecast Sales of Other Pet Food by Category: Value 2024-2029
- Table 64 - Forecast Sales of Other Pet Food by Category: % Volume Growth 2024-2029
- Table 65 - Forecast Sales of Other Pet Food by Category: % Value Growth 2024-2029

Pet Products in the US

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Healthy ageing concerns foster cross-industry overlap in product claims
- Natural wellness trend challenges growth in over-the-counter flea/tick treatments
- Households lean on at-home diagnostics amidst rising veterinary costs

PROSPECTS AND OPPORTUNITIES

- Ageing pet health trend to fuel the opportunity for dental health products
- Use case scenarios for pet tech
- Challenges and opportunities for wellness pet products

CATEGORY DATA

- Table 66 - Sales of Pet Products by Category: Value 2019-2024
- Table 67 - Sales of Pet Products by Category: % Value Growth 2019-2024
- Table 68 - Sales of Pet Healthcare by Type: % Value 2019-2024
- Table 69 - Sales of Other Pet Products by Type: % Value 2019-2024
- Table 70 - NBO Company Shares of Pet Products: % Value 2019-2023
- Table 71 - LBN Brand Shares of Pet Products: % Value 2020-2023
- Table 72 - Distribution of Pet Products by Format: % Value 2019-2024
- Table 73 - Forecast Sales of Pet Products by Category: Value 2024-2029

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/pet-care-in-the-us/report.