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# Pet Treats & Chews: United States

November 2021



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# About This Report

## Scope

This report forecasts US pet treat and chew retail sales in nominal US dollars for 2021-2025. To illustrate historical trends, total retail sales are provided in annual series from 2016-2020.

This Packaged Facts report examines the US market for pet treats and edible chews, with a focus on products for dogs and cats. Products include indulgent treats, rawhide/long-lasting edible chews, functional treats, and dental chews and treats. Throughout the report, the overall market is referred to as “treats” or “treats and chews”.

Specifically excluded are:

- pet foods marketed as complete and balanced diets, covered in Packaged Facts’ *U.S. Pet Market Focus: Pet Food Update, 2021* and *Pet Food in the U.S.*
- products marketed primarily as nutritional supplements, covered in Packaged Facts’ *Pet Supplements in the U.S.*
- rope chews and rubber chew toys, covered in Packaged Facts’ *Durable Dog and Cat Pet Care Products in the U.S.*
- sales through the veterinary channel (veterinary channel products are mentioned in context)

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or  $r^2$ . The most stable data series relative to the trend carries an  $r^2$  value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

A full outline of report items by page is available in the Table of Contents.

## Sources

*Pet Treats & Chews: United States* (FF90051) is based on *Pet Treats and Chews in the US*, a comprehensive industry study published by Packaged Facts. The information contained in that report was obtained from primary and secondary research. Primary research included national online consumer polls of US adult pet owners (age 18+) conducted on an ongoing

basis by Packaged Facts, designed to measure purchasing patterns and attitudes regarding pet products and services. With sample sizes of approximately 2,000 pet owners, these surveys are based on national online research panels that are census representative on the primary demographic measures of age, gender, geographic region, race/ethnicity, and household income. The main survey used in this report was conducted in August/September 2021.

Primary research also included interviews with pet market experts; participation in pet industry events including the American Pet Products Association's Global Pet Expos and *Petfood Industry/Watt Publishing's Petfood Forums*; on-site examination of retail stores; and internet canvassing including websites and blogs. Secondary research included gathering information and data from consumer business and trade publications, company profiles in trade and consumer publications, and information culled from Packaged Facts' extensive pet market research database and report collection.

Sales estimates were based on published and estimated sales of major market participants, market size estimates from other sources appearing in the trade press, figures obtained through consultation with pet market participants, the performance of relevant retail venues, consumer usage rates for pet treats, rates of company and product entries into the market, and background sales data from syndicated sales-tracking resources.

The consumer trend discussion draws on trended MRI-Simmons National Consumer Study data though the Spring 2021 release.

Packaged Facts defines generational cohorts as follows, adjusted into five-year age bracket groupings in reporting consumer survey data:

- Gen Z: born 1997-2020, currently adults age 18-24
- Millennials: born 1977-1996, currently age 25-44
- Gen X: born 1965-1976, currently age 45-54
- Baby Boomers: born 1946-1964, currently age 55-74
- Pre-Boomers/Older Seniors: born before 1946, currently age 75+

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

## Industry Codes

**Table 7 | NAICS & SIC Codes Related to Pet Treats & Chews**

NAICS/SCIAN 2017 North American Industry Classification System		SIC Standard Industrial Classification	
311111	Dog and Cat Food Mfg	2047	Dog and Cat Food
311119	Other Animal Food Mfg	2048	Prepared Feed and Feed Ingredients for Animals and Fowls, except Dogs and Cats
424990	Other Miscellaneous Nondurable Goods Merchant Wholesalers	5149	Groceries and Related Products, NEC
453910	Pet and Pet Supplies Stores	5199	Nondurable Goods, NEC
		5999	Miscellaneous Retail Stores, NEC

Source: US Census Bureau

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## Resources

### Packaged Facts

*Durable Dog and Cat Petcare Products*

*Pet Food in the U.S.*

*Pet Litter, Clean-Up, and Odor Control: U.S. Market Trends and Opportunities*

*Pet Medications in the U.S.*

*Pet Population and Ownership Trends in the U.S.: Dogs, Cats, and Other Pets*

*Pet Supplements in the U.S.*

*Pet Treats and Chews in the US*

*U.S. Pet Market Outlook, 2021-2022*

*Veterinary Services in the U.S.: Competing for the Pet Care Customer*

### The Freedonia Group

#### Freedonia Industry Studies

*Cannabis Growing Market*

*Converted Flexible Packaging*

*Global E-Commerce*

*Global E-Commerce Packaging*

*Global Food Processing Machinery*

*Global Pressure Sensitive Tapes*

*Labels*

*Pouches*

*Retail-Ready Packaging*

#### Freedonia Focus Reports

*Cannabis Production: United States*

*COVID-19 Market Impact Analysis*

*Demographics: United States*

*E-Commerce: United States*

*Pet Food: United States*

*Pet Medications: United States*

*Pet Products & Services: United States*

#### Freedonia Custom Research

### Trade Publications

*Pet Age*

*Pet Business*

*Petfood Industry*

*Pet Product News International*



## Agencies & Associations

American Pet Products Association  
American Veterinary Medical Association  
Association of American Feed Control Officials  
National Animal Supplement Council  
Private Label Manufacturers Association  
United States Census Bureau  
United States Department of Agriculture  
United States Food and Drug Administration  
United States International Trade Commission  
World Pet Association