

PET SUPPLIES – US – 2023

Pets are a significant part of consumers' lives. Consumers' shopping behaviors show how they value their pets and their desire to keep them safe, happy and healthy.



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Pet Supplies – US – 2023

This report looks at the following areas:

- Types of pet supplies purchased
- Shopping frequency
- Which retailers consumers shop for pet supplies
- Important factors that drive retailer preference
- Attitudes and behaviors toward shopping for pet supplies
- Interest in future pet supply offerings

Overview

Pets are a significant part of consumers' lives. Consumers prioritize their pets' wellbeing with many (49%) looking for natural options in their future purchases. This shows that as consumers detox their lives, they are applying the same mindset to the pet supplies they purchase.

While inflation has hit consumers' wallets hard, pet owners remain firm in their purchasing habits. They aren't willing to change what and where they buy, and instead are more actively seeking out coupons and deals in order to maintain their current behaviors. With a focus on budget, brands that offer deals and promotions will seem more attractive to shoppers still wrestling with inflation.

One of the biggest opportunities in the market lies in creating lifestyle products for pets. Consumers want to take their pets wherever they go and have them comfortably participate in various activities (eg hiking, road trips). Brands can expand their product lines to accommodate these needs and assist consumers in having their pets partake as a companion in their activities.



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Brands and retailers will need to be aware of their environmental footprint moving forward. Consumers are conscious of their own environmental footprint and are aiming to purchase more sustainable pet supplies.

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Report Content

EXECUTIVE SUMMARY

Key issues covered in this Report

- Overview
- What you need to know
- Consumer trends: key takeaways
- Market predictions
- Opportunities

THE MARKET

Market drivers

- Despite consumer price increases, the pet supplies market remains resilient
 - Graph 1: Consumer Price Index change from previous year, 2021-23
- The effects of inflation will continue to be felt in the coming months even as prices normalize
- Millennials are a large generation and more likely than the average adult to be pet owners
 - Graph 2: any pet ownership, by generation, 2023
- Pet owners need brands to consider the environment when making supplies

Market size and forecast

- US retail sales and fan chart forecast of pet supplies, 2023-28
- US retail sales and forecast of pet supplies, at current prices, 2018-28
- The pet supplies market is poised for continued growth

Brand share

- Sales of pet supplies, by company

CONSUMER INSIGHTS

Consumer fast facts

Pet supplies purchased

- Supplies that promote fun, safety, and comfort are top sellers
 - Graph 3: pet supplies purchased in last 12 months, 2023
- Pet care can equate to child care for younger generations
 - Graph 4: pet supplies purchased in last 12 months, by generation, 2023
- Pet tech can help pet parents garner deeper insight into their pet's needs

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- Opportunity looms for supplies with added benefits
 - Graph 5: health and grooming supplies purchased in last 12 months, 2023
- Brands should position themselves as partners for at-home care
 - Graph 6: health and grooming supplies purchased, by pet ownership in last 12 months, 2023
- Litter doesn't have to be a dirty word
- Pet owners prioritize holistic health for their furry companions
 - Graph 7: health and grooming supplies purchased in last 12 months, by generation, 2023

Shopping frequency

- Stock-up trips are standard for pet owners
 - Graph 8: shopping frequency (NET), 2023
- Multiple pets don't equate to multiple trips to the store
 - Graph 9: shopping frequency, by pet ownership, 2023

Retailers shopped

- Pet owners seek out retailers that provide all their pet needs in one place
 - Graph 10: retailers purchased, 2023
- Consumers trust the expertise of pet-specific retailers
 - Graph 11: retailers purchased – health products, by generation, 2023
- Partnerships with vets are still an option but a more expensive route for consumers

Important factors that drive retailer preference

- Options, ease of use, and trustworthiness are most important to consumers in deciding where to shop
 - Graph 12: important retailer factors (NET – any rank), 2023
- Consumers across generations lean on reviews and recommendations from others when deciding which supplies to purchase
 - Graph 13: important retailer factors, by generation, 2023
- Lean into personalization to connect with younger consumers

Attitudes and behaviors toward shopping for pet supplies

- Pet owners hold on to current shopping behaviors with help from discounts, coupons
 - Graph 14: shopping behaviors, 2023
- Younger consumers embrace secondhand shopping across various categories in their lives, including pet supplies
 - Graph 15: shopping behaviors – secondhand shopping, by generation, 2023
- Honor pets' memories through secondhand offerings
- Owners want to purchase supplies with a purpose for good
 - Graph 16: attitudes toward shopping pet supplies, 2023
- Consumers plan their budgets around pets and their needed supplies
 - Graph 17: attitudes toward shopping pet supplies, 2023
- Pet owners take their time to find the right product for their pet

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- Graph 18: attitudes toward shopping pet supplies, 2023
- Younger consumers drive awareness in social causes when purchasing pet supplies
 - Graph 19: attitudes toward shopping pet supplies, by generation, 2023
- Future pet owners drum up excitement for custom products
 - Graph 20: attitudes toward shopping customizable pet supplies, by pet ownership, 2023
- Pet owners leverage social media to learn how to best care for their beloved pet
 - Graph 21: attitudes toward using social media when shopping pet supplies. by pet ownership, 2023
- Social media can bridge the digital-physical gap
- Pets are a part of family life – including celebrations
 - Graph 22: attitudes toward retailers helping celebrate special occasions, by pet ownership, 2023

Future offerings

- The future of pet supplies and wellness lies in preventative care with attention on natural ingredients, functional benefits
 - Graph 23: interest in future offerings for pet supplies, 2023
- Natural, functional, and personalized supplies are a focus for current and future pet owners
 - Graph 24: interest in future offerings for pet supplies. by pet ownership, 2023
- Where younger consumers drive interest, older consumers will follow
 - Graph 25: interest in future offerings for pet supplies, by generation, 2023

COMPETITIVE STRATEGIES

Market opportunities and competitive strategies

- Key opportunities in pet supplies
- Lowe's expands Petco store-in-stores to give consumers another way to purchase supplies
- Lowe's highlights its love for consumers' furry friends
- Pet owners aren't just owners: they're parents
- Chewy hones the idea of pets as children in the family
- Sustainability seeps into shopping for supplies
- Consumers aim to care for their pets in the same – or better – way they care for themselves
- Pet parents look for tools that allow them to explore the world with their pet in tow

APPENDIX

- Market definition
- Market context
- Consumer research methodology
- Generations
- Abbreviations and terms
- Forecast

- Forecast fan chart

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