



## Pet Supplements and Nutraceutical Treats in the U.S. – 2013

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### Introduction

The following summary of the pet supplements and nutraceutical treats market is based on a research report compiled by Packaged Facts, a market research company based out of Rockville, Maryland.

In this report, supplements are products that are sold in traditional supplement forms including pills, tablets, powders, liquids and sprays. Nutraceutical treats are edible treats that contain supplements or novel botanical ingredients designed to address specific health conditions. Dental treats are excluded with the exception being those that are primarily positioned on a functional ingredient or health benefit beyond teeth-cleaning.

Packaged Facts estimates total U.S. retail sales of pet supplements and nutraceutical treats at \$1.3 billion in 2012. This reflects a 1.4 per cent compound annual growth rate. Sales did slow down during the U.S. recession but it was more highly reflected in the equine market. Although there has been a slow down, sales are still expected to grow by 3 - 5 per cent on an annual basis through 2017, bringing the market to \$1.6 billion.

#### Sources

- ◆ Packaged Facts, a market research company based in Rockville, Maryland.

## Introduction cont.

Underscoring the importance of the senior animal segment, products specifically designated for joint and/or senior health account for one-third of retail sales of dog supplements and nutraceutical treats and one-fifth of sales for cats in 2012. On the canine side, multivitamin/minerals are second in line at 22 per cent and omega fatty acid at 21 per cent. At 26 per cent multivitamins rank first on the feline side with other top types being omega fatty acid at 22 per cent and digestive health at 16 per cent. Condition specific segments such as digestion, calming and liver and kidney health have become more active. Joint products predominant-

ly glucosamine, chondroitin, hyaluronic acid and MSM lead on the equine side, accounting for 32 per cent of sales of horse supplements and nutraceutical treats. Digestion accounts for 15 per cent and general health and hoof care are each at 10 per cent. There will also be more of a range of condition-specific product expansion especially those targeting age-related conditions beyond joint health such as cognition, eye health, liver and kidney health, as well as conditions stemming from obesity including diabetes.

## Consumer Traits of Pet Nutraceutical Treat Purchasers



If consumers have two or more dogs they are more likely to purchase nutraceutical and ordinary dog treats. Twenty three per cent of all dog owners buy these treats for their dogs but if they own multiple dogs the percent rises to 29 per cent.

If the owner uses human supplements it proves to be a significant indicator that they will also buy dog or cat nutraceutical treats for their pets. Twenty-eight percent

of dog owners and 20 per cent of cat owners who use human supplements also buy them for their pets. Also, pet owners who provide their pets with routine veterinary care are significantly more likely to use pet nutraceuticals.

Use of Pet Supplements and Nutraceutical Treats by Type: Dog vs Cat Owners, 2012		
Classification	Dog Owners	Cat Owners
Joint Health	44%	14%
Skin/Coat	30	30
Digestive Health/Fur balls (cats)	25	38
Heart Health	22	16
Omega Fatty Acid	18	21
Multivitamin/Mineral Formula	17	21
Senior Formula	12	14
Calming or Motion Sickness	10	11
Cognitive Functioning/Brain Health	10	13
Probiotic	9	12
Weight Loss/Maintenance	9	8
Urinary Health	7	16
Milk Replacement/Weaning	5	12
Other	11	14

Note: Percentages total more than 100% because multiple types are purchased.

Figure 1 – Use of Pet Supplements and Nutraceutical Treats by Type:

DOG



Vs CAT



## Demographic Patterns are Inconsistent

Demographic patterns for use of supplemental pet nutrition products (combining pet supplements and nutraceutical treats) seems complex and inconsistent in the context of overall pet ownership.

For example, usage points largely to 18 to 24 year olds among both dog and cat owners with an index of 136 and 123 respectively. (The index is based on 100 so the higher the number is over one hundred the more they use or buy these products. The lower the number is under 100 the less likely they are to buy these products.)

Usage of these products is also higher for Hispanics. If they own a dog the index rises to 157, if they own a cat the index rises to 170. African-American dog owners also are more likely to use these products at an index of 149.

Purchasing of supplemental pet nutrition products also is higher among those with lower educational levels. This is especially true about cat owners. Consumers with lower individual employment income seem to buy more of these products for their pets.

## Market/Competitive Trends

Marketers of pet supplements in the U.S. number approximately two hundred and range from some of the largest names in pet supplies to smaller mom and pop operations. Their retail sales range from one company with over \$1 million dollars to as little as \$35,000. It is really hard to get a good picture of the market, because many of the retail pet stores or veterinarian office sales are not tracked. There are some marketers that focus exclusively or primarily on the veterinary channel.

For makers of vet-targeted supplements, patented formulations are a core strategy, as is being able to claim that a supplement formulation or ingredient is backed by clinical trials.

As pet supplements continue to go mainstream, marketers have been expanding beyond their traditional base in veterinarian's offices and/or pet specialty stores. There are also more pet supplement retailers getting into the private-label approach for product marketing.

There is definitely opportunity to enter this market. Not all the companies are big and if you want to enter this market just follow the trends in human products as they transfer quite rapidly to the pet industry. Right now, as with the aging human population, joint health, diabetes, and obesity products seem to be the products that are frequently highlighted.

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