

North America Pet Treats - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2017 - 2029

Market Report | 2024-02-17 | 228 pages | Mordor Intelligence

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Report description:

The North America Pet Treats Market size is estimated at USD 11.97 billion in 2024, and is expected to reach USD 18.60 billion by 2029, growing at a CAGR of 9.22% during the forecast period (2024-2029).

Increased demand for premium pet treats is driving the market

- Dogs dominated the North American pet treats market, and dogs accounted for about 54.7% of the market value in 2022. This can be attributed to the fact that dogs comprise a significant proportion, around 41.7% of the overall pet population in the region in 2022. Furthermore, there is a growing trend toward premium dog treat products in the region, and the dog pet treats market is anticipated to register a CAGR of 10.6% during the forecast period.
- In 2022, cats represented the second-largest market share in the North American pet treats market, accounting for about 25.0% of the market value. However, this is comparatively lower than dogs, primarily due to their lower population. The number of pet cats in North America was 49.3% less than the number of pet dogs in 2022.
- Despite accounting for around 30.4% of the total pet population in the region, other pet animals, such as birds, fish, and rodents, only represented 20.3% of the total market value in 2022. This was largely because these pets are generally small in size and require relatively small amounts of food.
- Dental treats are the most consumed treats by dogs, and they accounted for about 25.6% of the pet treats consumption value by dogs in 2022. This domination of dental treats is mainly because dental issues are more common in dogs compared to other pet animals. These dental treats are anticipated to register a CAGR of 11.2% during the forecast period. Freeze-dried and jerky treats are the most popular treats consumed by cats, and they accounted for about 24.9% of the pet treats market value in cats in 2022.

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- The increasing trend of pet humanization is anticipated to drive the market during the forecast period.

The United States is the largest pet treats market in the region due to the growing pet humanization and premiumization in the country

- The North American pet treats market is a significant and expanding sub-market of the pet food market. In 2022, the pet treats market accounted for 14% of the pet food market in North America, growing by 64% compared to 2017. This observed growth was primarily due to the increasing number of pet owners in the region. For instance, in 2022, the pet population in the region was recorded at 345.6 million, which was 12% more than in 2017. Dogs are the most popular pets in the region, accounting for the largest market share in the pet treats market at 42% in 2022, followed by cats at 28%.

- In 2022, the US market was valued at USD 8.74 billion, followed by Canada at USD 810.2 million and Mexico at 517.8 million. The United States' high market share is due to its large pet population and well-established pet treats market. It is also the fastest-growing country in the region, and it is expected to register a CAGR of 9.4% during 2023-2029. Crunchy treats, dental treats, and freeze-dried and jerky treats are popular in the region. Pet treats made with grain-free and novel proteins, specifically formulated for dental and oral health, and other supplements are popular and have a high demand in the market. Many pet owners are willing to pay more for premium products that are eco-friendly and sustainable.

- Specialty stores are the most preferred distribution channel, accounting for 37.7% of the total distribution channels for pet treats in the region. Online is the fastest-growing channel in the region, and it is estimated to record a CAGR of 10.5% during 2023-2029. With the increasing demand for high-quality treats, premiumization of pet treats, and e-commerce availability, the regional market is estimated to record a CAGR of 9.1% during 2023-2029.

North America Pet Treats Market Trends

Increased adoption of cats by younger adults and millennials in the region is driving the growth

- Cats have been adopted as pets in North America due to the high demand for companionship and less expenditure on pet food for cats compared to other pets. Moreover, in the region, cats as pets increased by 13.6% between 2017 and 2022 due to a rise in pet humanization, and cats require less area to live. For instance, in the United States, in 2020, 26% of households owned a cat as a pet, whereas, in Canada, it was 29.3%.

- The United States, Canada, and Mexico have witnessed higher adoption of cats as pets after the pandemic because there is an increase in pet ownership stimulated by remote work, and more pet owners belong to the millennial generation. For instance, in 2022, millennials accounted for 33% of pet parents in the United States, and in 2020, 40% of the cat pet population was adopted from animal shelters in the United States. Additionally, pet parents purchased cats from pet stores due to high income, and in 2020, 43% of cat parents in the United States purchased cats from pet stores. Therefore, cats as pets in North America increased by 5.34% between 2020 and 2022.

- There is a higher adoption of young cats in the United States as compared to adult cats by pet parents. For instance, in 2021, the adopted cat population in the United States was about 684,144, and young cats accounted for 53.5% of the cats adopted in the country. The higher population of young cats and millennials being pet parents is expected to help in the growth of pet treats during the forecast period.

- Factors such as an increase in the adoption and purchase of cats and an increase in pet humanization are expected to help the growth of the pet population, and the rise of the pet population will help in the growth of the pet food market in the region.

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Demand for natural and organic treats is increasing the pet expenditure in the region

- A trend of increase in pet expenditure is witnessed in North America. The rise in pet expenditure is due to the availability of different types of pet food and the growing premiumization of pet food products in the United States and Canada. Moreover, pet parents are spending on premium segments, such as customized pet food and natural and organic pet food, in the region.
- Pet parents' highest expenses are on pet food, which is estimated to increase during the forecast period. For instance, pet food accounted for 42.4% of pet expenses in the United States (USD 136.8 million) in 2022. They have the highest share and are projected to increase due to pet parents treating their pets as family members and increased awareness about specialized pet food. The dog's food expenditure share is higher than that of cats because the dog population is higher, and they consume a larger quantity of food than cats. Pet Parents provide premium pet food to their pets and use services, such as pet grooming and pet daycare, in the region as they consider them as family members. In the United States, about 40% of pet parents purchased premium pet food, and USD 11.4 billion was spent on services, such as pet grooming and pet walking, in 2022.
- Pet parents purchase pet food through online retailers, supermarkets, and pet stores. Higher Pet food sales are through online retailers as pet parents have a vast number of pet food products available on e-commerce sites, and the pandemic increased online orders. For instance, in the United States, online sales of pet care products, including food, increased from 32% in 2020 to 40% in 2022.
- Premiumization and rising awareness about the benefits of quality food are factors anticipated to have helped in increasing pet expenditure in the region.

North America Pet Treats Industry Overview

The North America Pet Treats Market is moderately consolidated, with the top five companies occupying 59.58%. The major players in this market are Colgate-Palmolive Company (Hill's Pet Nutrition Inc.), General Mills Inc., Mars Incorporated, Nestle (Purina) and The J. M. Smucker Company (sorted alphabetically).

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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