

Pet Oral Care Products - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Pet Oral Care Products Market size is estimated at USD 1.9 billion in 2024, and is expected to reach USD 2.61 billion by 2029, growing at a CAGR of 6.60% during the forecast period (2024-2029).

Key Highlights

- The high prevalence of dental diseases in pets primarily drives the market. According to the Australian and American veterinary dental societies, more than 80% of dogs develop gum disease by the age of three, compared to more than 70% of cats at the same age. Therefore, the rise in awareness of pet oral health and increased veterinary health expenditure are expected to propel market growth over the forecast period.
- In addition to the rise in awareness about pet oral health, an increase in veterinary health expenditure is a major boost to market growth. Furthermore, rapid advancements and product launches have also propelled the market globally. However, the high cost of products and the need for proper veterinary dentistry in developing countries will likely hamper the global market.
- Though North America and Europe are the most dominant regions, countries in Asia-Pacific, such as Australia, also witness an increase in the adoption of pets. Statistics released by the Pet Food Manufacturers Association in 2019 revealed that the pet ownership rate stood at 57% and 40% among American households and UK veterans, respectively. In contrast, it stood at 61% in the Australian market, with over 29 million pets. The huge pet population and rising expenditure on pet health needs by pet owners are leading to an increase in innovative product launches by various players present in the North American region.

Pet Oral Care Products Market Trends

High Prevalence of Dental Diseases and Increase in Animal Health Expenditure Expected to Drive the Market

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The pet oral care products market is benefitting tremendously, owing to the increasing per capita animal healthcare expenditure. According to the American Pet Product Association (APPA), America has 89.7 million pet dogs, and pet owners spend an average of USD 49.70 on a dog's dental care annually compared to human oral healthcare. The rise in the prevalence of many diverse oral health-related diseases has been identified as the major driving factor for market growth. Periodontal disease is the most common clinical condition in cats and dogs, which is largely preventable by tooth brushing.

As per the American Veterinary Medical Association (AVMA), the disease can lead to severe health concerns ranging from tooth loss to organ failure. According to AVMA, around 70% of cats and 80% of dogs develop some degree or form of periodontal disease by the time they are three years old. Common oral issues among pets include calculus, gingivitis, gum disease, and tooth fractures. According to the American Pet Products Association (APPA), the total pet industry expenditure on average in the United States was USD 90.5 billion in 2018, which increased to USD 123.6 billion in 2021. According to a nationwide pet owner poll by the finance website LendEDU, over half of all Americans spend the same or more on their dogs' healthcare than they do on themselves. 20% of individuals polled have gone into debt to care for their dogs, with the average amount due being USD 1,567. Therefore, high awareness about pet health among pet owners and a rise in the number of dental procedures are other factors expected to propel the market's growth.

North America Dominates the Pet Oral Care Products Market

North America is expected to retain its dominance in the pet oral care products market over the forecast period, owing to the rising companion animal adoption and the increasing per capita animal healthcare expenditure. In addition, the rise in the prevalence of many diverse oral health-related diseases has been identified as the major driving factor for market growth. According to the American Pet Product Association (APPA), America has 89.7 million pet dogs, and pet owners spend an average of USD 49.70 on a dog's dental care annually compared to human oral healthcare. On average, an American spends USD 42.24 on his annual dental care in out-of-pocket expenses, as reported by the American Dental Association. According to the American Pet Products Association's 2021-2022 National Pet Owners Survey, 70% of US households, or around 90.5 million families, own a pet. This is an increase from 56% of US households in 1988, the first year the study was performed, to 67% in 2019. Additionally, the high awareness of pet health among pet owners and a rise in the number of dental procedures are other factors propelling the growth of the pet oral care market in North America.

Pet Oral Care Products Industry Overview

The pet oral care products market is fairly consolidated, with leading global players occupying significant shares in the market. The major players in the market are Mars Inc., Purina Pet Care, Virbac, Ceva, Hills Pet Nutrition Inc., and Vetoquinol SA, among others. The key players in the market have been involved in many strategic activities to increase their market share. They are focused on new product launches, mergers and acquisitions, and expansions to cater to a wider consumer base. Manufacturers are also investing in the production process to reduce the cost of production.

Additional Benefits:

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

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