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United States Pet Veterinary Diet - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2017 - 2029

Market Report | 2024-02-17 | 202 pages | Mordor Intelligence

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Report description:

The United States Pet Veterinary Diet Market size is estimated at USD 9.26 billion in 2024, and is expected to reach USD 15.23 billion by 2029, growing at a CAGR of 10.46% during the forecast period (2024-2029).

The veterinary diets market for dogs is the fastest growing due to pet owners' increased focus on pet health

- The pet veterinary diet market in the United States is the largest in North America, representing about 89.3% of the market value in 2022. This dominance can be attributed to the high number of pets in the country, accounting for about 69.2%. The market for veterinary diets for dogs and cats has been growing steadily, driven by increasing awareness of pet health and the need for specialized diets to address specific health conditions.
- The pet veterinary diet market in the United States is dominated by dogs, which held the largest market share of about 55.3% in 2022. This was mainly due to the large population of dogs, which reached about 92.4 million in 2022. Dogs commonly require specialized diets to manage health conditions such as obesity, diabetes, and joint problems. The dog segment of the veterinary diet market is anticipated to register a CAGR of 12.8% during the forecast period. It is anticipated to be the fastest-growing segment, fueled by the rising trend in pet humanization and premiumization in the country.
- The cat segment of the veterinary diets market is the second largest, accounting for 28.4% of the market value in 2022. Common health conditions for which cats require specialized diets include kidney disease, urinary tract problems, and diabetes. The cat segment is anticipated to register a CAGR of 9.3% during the forecast period.
- Other pets, such as birds, small mammals, and reptiles, also have specialized veterinary diets available, but they hold a smaller market share compared to dogs and cats. As pet owners continue to focus on pet health, the demand for specialized diets is expected to increase, driving the market during the forecast period.

United States Pet Veterinary Diet Market Trends

The increase in people seeking cats as companion pets among millennials is increasing cat adoption in the country

- The cat population in the United States is increasing. Cats as pets have been adopted in the country due to the high demand for companionship and less expenditure on pet food than other pets. In the country, the share of cats as pets increased by 10.8% between 2017 and 2022 due to a rise in pet humanization and because cats require less area to live than dogs. For instance, in the United States, 26% of households owned a cat as a pet in 2020, which increased to 53.5% in 2022.
- The United States witnessed higher adoption of cats as pets during the pandemic because of the work-from-home culture, leading to a demand for companionship and a higher number of pet owners being millennials. For instance, in 2022, millennials comprised 33% of pet parents in the United States, and in 2020, 40% of the cat population was adopted from animal shelters. In 2020, in the United States, 43% of pet parents purchased cats from pet stores due to high income. Therefore, cats as pets in the country increased by 4.5% between 2020 and 2022.
- Cat parents treating their cats as a part of their family accounted for 76% of cat owners between 2017 and 2018. This is expected to help in the growth of pet products, including pet food, as pet parents want to provide their pets with nutritious, specialized pet food. People also gifted cats to their loved ones, accounting for 3% of cat owners in the United States in 2021.
- Factors such as an increase in the adoption and purchase of cats and an increase in pet humanization are expected to boost the growth of the pet population. The increase in pet population would drive the growth of the pet food market in the country.

The increasing disposable income of pet owners and increased focus on pet health and well-being are increasing pet expenditure

- Pet expenditure in the United States has been steadily increasing over the years. The overall pet expenditure in the country increased from USD 123.6 billion in 2021 to USD 136.8 billion in 2022, representing a 10.7% increase in the overall pet expenditure. This rise in pet expenditure is mainly attributed to the growing pet humanization, increasing disposable incomes of pet owners, and increased focus of owners on their pets' health and well-being.
- Expenditure on pet veterinary diets accounted for about 21.4% of the average pet food expenditure per pet in 2022. The veterinary diet expenditure per pet in the country increased from USD 334.3 in 2017 to USD 420.4 in 2022. This increase was mainly attributed to the growing incidence of pet diseases, increased pet humanization, increased spending on preventive care, and the various health benefits associated with pet veterinary diets. Among pet animals, the pet veterinary diet expenditure on dogs is the highest and was valued at USD 167.0 per dog in 2022. This is followed by cats and other pets, which were valued at USD 134.7 and USD 118.6, respectively, in the same year.
- Pet parents?purchase pet veterinary diets through online retailers, supermarkets, and pet stores. Sales of pet veterinary diets through specialty stores and online retailers are high, as pet parents have a wide range of pet veterinary diet products available on e-commerce platforms. Also, the pandemic increased the demand for online orders. The share of sales of pet veterinary diets through online channels in the country increased from 29.1% in 2019 to 30.6% in 2022. The growing awareness of the benefits of quality food and the premiumization of pet food products are factors anticipated to continue driving pet expenditure in the country.

United States Pet Veterinary Diet Industry Overview

The United States Pet Veterinary Diet Market is moderately consolidated, with the top five companies occupying 43.28%. The major players in this market are Colgate-Palmolive Company (Hill's Pet Nutrition Inc.), General Mills Inc., Mars Incorporated, Nestle (Purina) and Schell & Kampeter Inc. (Diamond Pet Foods) (sorted alphabetically).

Additional Benefits:

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

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