



# 2022 MID-YEAR RECAP

**Data Ending 6/12/22**



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# The Intelligence Network for SPINS Pet Retail

For 25 years we have passionately been supporting the remarkable growth of retailers in the Natural, Health & Wellness industries.

We have built our business by protecting your data privacy while helping you differentiate your business with the confidence that you are making winning decisions and enhancing your shoppers' experience.

SPINS is committed to delivering the same privacy and growth to the network of pet retailers and pet brands that are committed to the health and wellbeing of pets.

# SPINS Pet Positioning Statement

Committed to the success of the pet industry, SPINS has created a community focused on industry growth, ensuring proliferation of innovative healthy options for pets. This offering unlocks unfettered access to the information, insights and support necessary to succeed.



# 2022 MID-YEAR RECAP



# Consumables Driving Growth in 2022



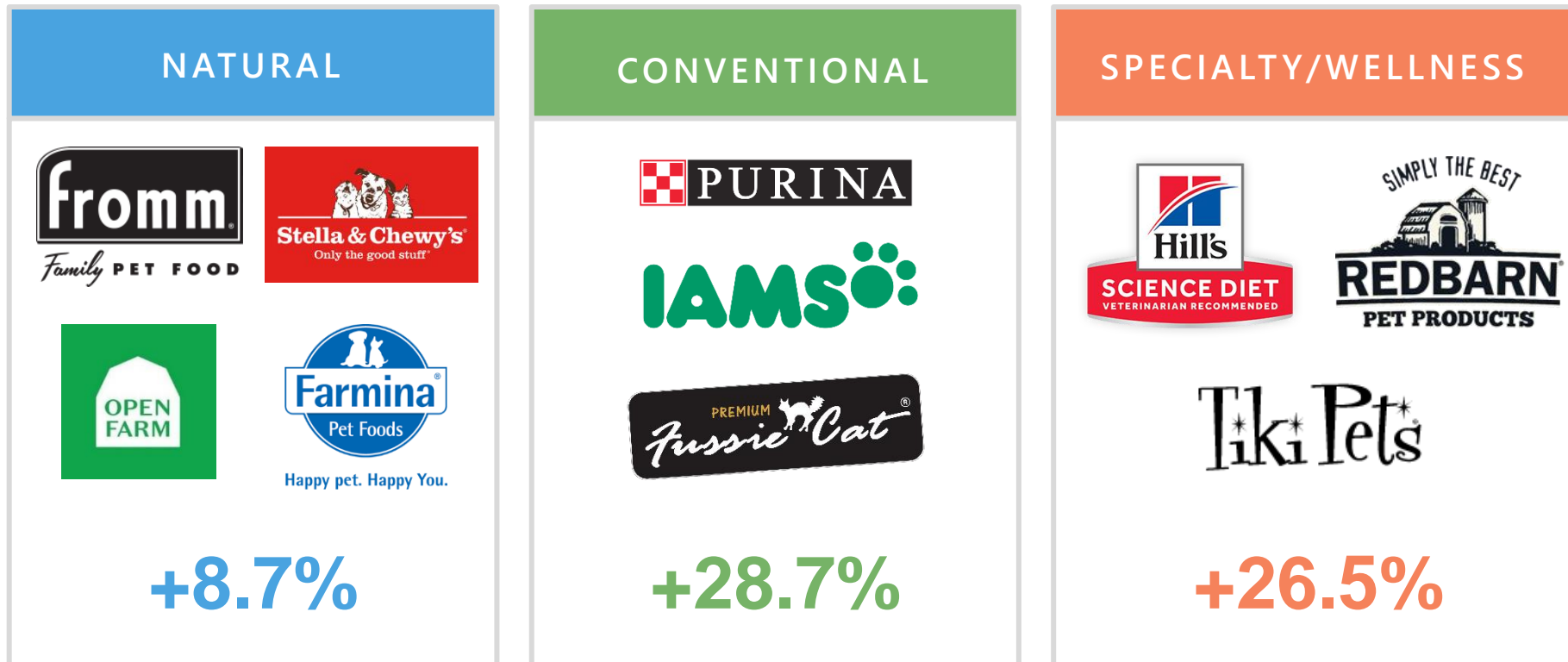
The pet market continues to be driven by consumables, as sales start to normalize year-over-year after peaks due to COVID restrictions last year.



# Pet Positioning Group Trends



SPINS Pet Conventional and Specialty/Wellness brands reported double digit growth of over 26%. Natural brands in the channel make up over 80.1% of total sales.




# Pet Parents Driving Growth Through Food & Treats



Pet owners continue to drive pet market growth through Pet Food, with **Dog Food** contributing the most to growth holding a 79% \$ share and **Cat Food** holding 18% \$ Share.


**+11.9%**  
Pet Food \$  
Growth YoY

DOG FOOD



**+11.7%**

CAT FOOD



**+14.0%**

PET FOOD MISC



**+6.1%**



# Pet Parents Looking For Food with Functionality



Options that have functional benefits, including added **pumpkin** for **digestion**, and **cranberry** for **urinary care** are top of mind for pet parents.

## DOG FOOD



**KOHA**

**PURE SHREDS CHICKEN**

**PUMPKIN DOG FOOD**

## CAT FOOD



**FARMINA**

**QUINOA & DUCK URINARY**

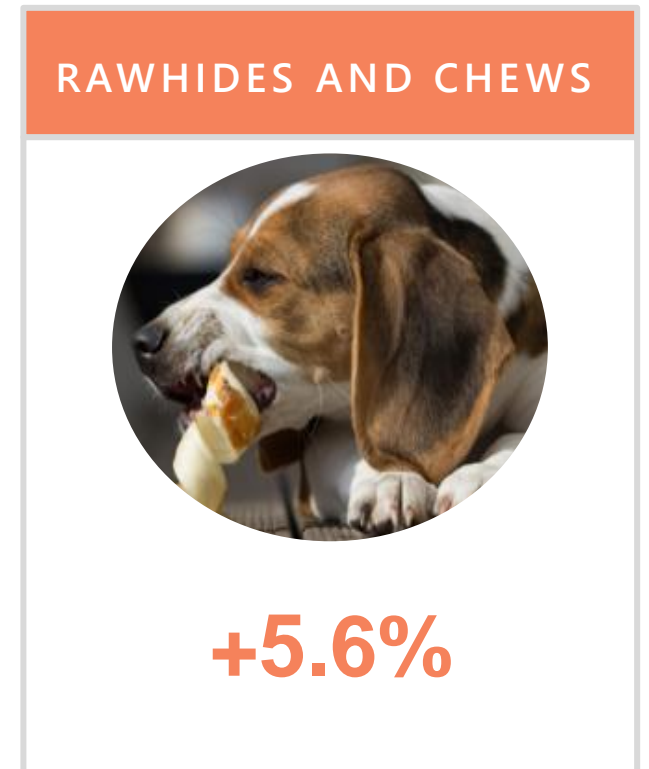
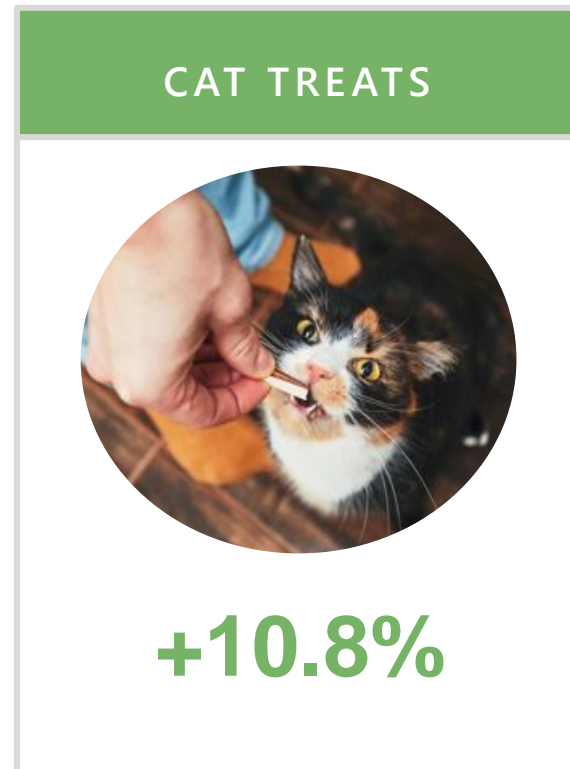
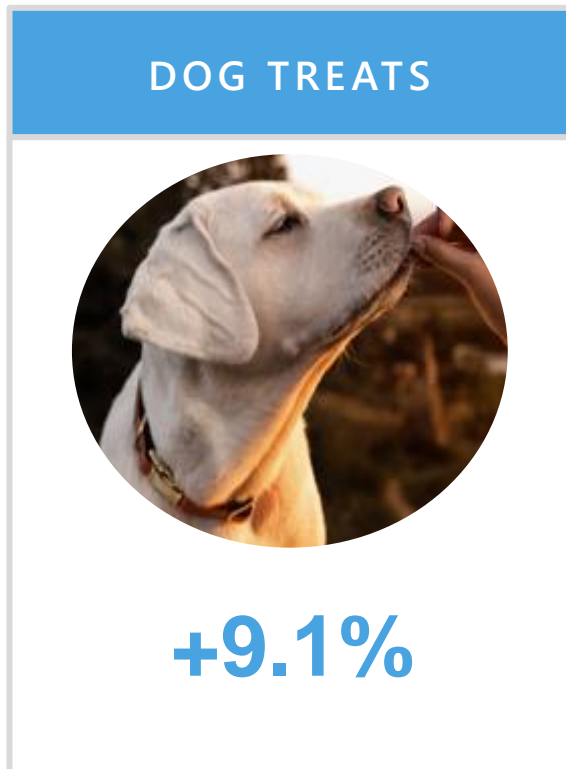
**CARE CAT FOOD**

# Pet Treats Continues to Grow Since 2020



Pet parents are at home more with their pets and continue to drive treats growth since 2020.

**+7.8%**  
Pet Treats \$  
Growth YoY



# Pet Parents Exploring Different Ingredients in Treats

Pet Parents are exploring different ingredients in treats from usual chicken and beef, including fish in dog treats, lamb in cat treats, and inclusion of peanut butter in chews.

## DOG TREATS



**Vital Essentials**  
**Freeze Dried Minnows**  
**+856.8%**

## CAT TREATS



**Feline Natural**  
**Lamb Bites**  
**+260.5%**

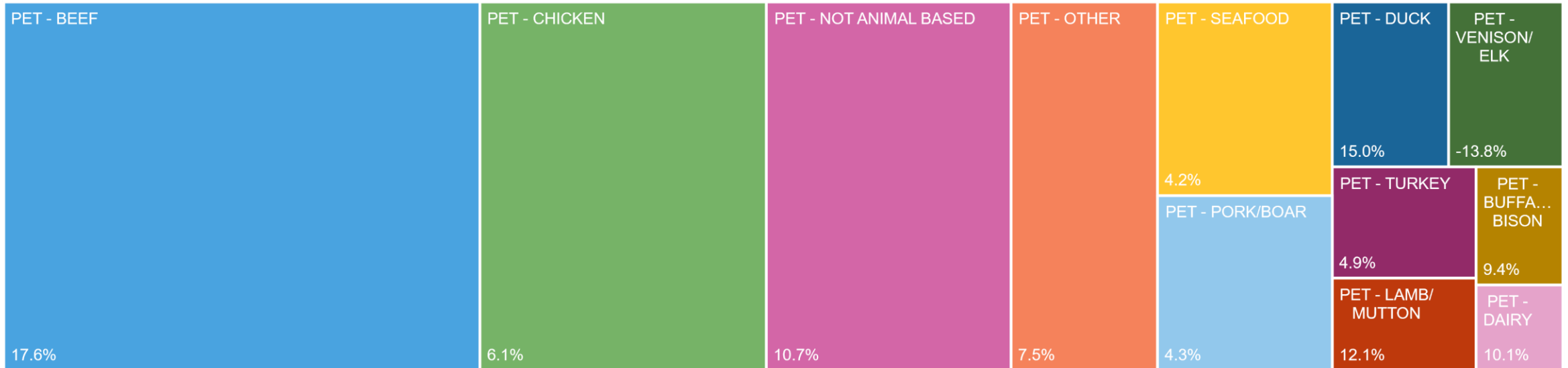
## RAWHIDES AND CHEWS



**Barkworthies**  
**Peanut Butter Beef Cheeks**  
**+404.8%**

# Alternatives to the Usual Chicken and Beef Treats

Pet Animal Types by Dollar Share



Owners are purchasing more meat alternatives for treats

Seafood based treats have grown extensively in 2021

### WHAT TO KNOW...



# Pumpkin, Seafood, and Duck Based Treats



Peanut butter, pumpkin, sweet potato, seafood, & duck-based treats as an alternative to chicken and beef.



## ICELANDIC+

## Northwest Naturals



- Pumpkin, Potato, and Apple based treats
- Crunchy 8-calorie
- Free of Wheat, Corn, Soy, & Artificial flavors and colors



- 100% Sustainably fished
- Single Ingredient
- High in Omega-3s for healthy skin & coat



- Single ingredient - 100% Duck Necks
- Freeze Dried treats
- Convenient, soft textured, easy on digestion

# Pet Care & Wellness and Hard Goods Stabilized



Pet Care & Wellness and Hard Goods have stabilized in growth, while not reporting double digit growth as they did in 2021, they are still trending positive vs YAGO.



# Alternatives to the Usual Dry Kibble



Although Frozen and Refrigerated constitute a small overall dollar share, products in the space have grown extensively in dollars vs YAGO.

*\*Coded products only, does not include un-coded products*

	Pet	
	Dol\$ Share	Dol % Chg
<b>STORAGE TYPE</b>		
SHELF STABLE	92.88%	10.5%
FROZEN	6.76%	7.2%
REFRIGERATED	0.35%	80.7%
<b>FORM</b>		
DRY	62.69%	12.1%
WET	18.92%	11.2%
SOFT & CHEWY	8.75%	5.3%
FREEZE DRIED	4.92%	25.7%
DEHYDRATED	3.97%	2.1%
LIQUID/PASTE	0.76%	32.1%

**+12.0% growth vs YAGO**  
 Pet parents are looking for additional forms of food and treats to the usual dry kibble and treats

# Growth in Raw Food

Raw pet foods include benefits that processed/cooked pet food does not offer, including vitamins & minerals that would be burned off due to the extrusion process.

**+9.4%**

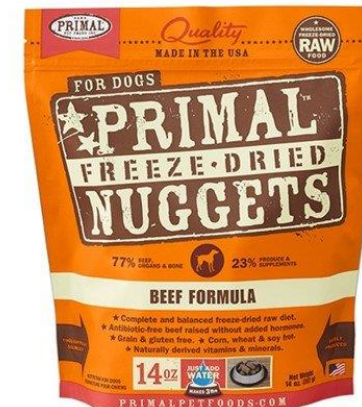
Raw Positioned \$  
Growth YoY

## STELLA & CHEWYS



**RAW BLEND  
RED MEAT RECIPE**

## PRIMAL



**FREEZE DRIED  
BEEF NUGGETS**



# Functional Ingredients Driving Purchase Decisions

Antioxidant and immunity, gut health, anti-inflammatory, and skin and coat health continue to report growth as customers focus on healthier and functional treats for their pets.

## ANTIOXIDANT AND IMMUNITY

**+9.0%**  
MULTIPLE VITAMIN - ADULT

**+18.9%**  
CHLOROPHYLL / CHLORELLA

**+12.0%**  
CRANBERRY SUPPLEMENTS

## GUT HEALTH

**+5.4%**  
PUMPKIN

**+16.4%**  
PROBIOTIC SUPPLEMENT

## ANTI-INFLAMMATORY

**+0.3%**  
GLUCOSAMINE

**+0.4%**  
CANNABIDIOL (CBD)

**+1.7%**  
HEMP SEEDS & DERIVATIVES

## SKIN & COAT HEALTH

**+13.6%**  
FLAX SEED AND/OR OIL

**+192.2%**  
COLLAGEN PRODUCTS

**+7.3%**  
FISH OIL CONCENTRATE

\* % Represents Dollar % Change YoY (vs same time LY)

# Functional Ingredients Driving Purchase Decisions

Owners are looking for more functional based products for their pets to help with immunity, digestion, anxiety, and coat health.

## MULTIFUNCTIONAL WHOLISTIC PET



### CANINE COMPLETE

+247.0%

## ANTI-INFLAMMATORY GREEN COAST PET



### SUPERBLEND CHEWS

+114.4%

## GUT HEALTH NATURVET



### PROBIOTICS & ENZYMES

+197.7%

## SKIN & COAT HEALTH PLATO



### SALMON OIL

+57.9%

\* % Represents Dollar % Change YoY (vs same time LY)



# Questions?

Please contact Kyle Mener  
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