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Pet Food

SIC: 2047; NAICS: 311111

Cat and Dog Food Sales by Volume, 2008

Data are estimated in millions of metric tons. This translates into an \$11.2 billion market. Superpremium products are based on nutrition and health rather than palatability. They are usually found in specialty channels, although this is changing. They are priced at an average of \$1.27/lb for dogs and \$2.01/lb for cats. Standard premium products are priced \$0.82/lb for dogs and \$1.68/lb for cats. Midpriced products are \$0.55/lb and \$0.91/lb, respectively. Economy products are priced \$0.32/lb and \$0.64, respectively. Treats may have added properties such as skin health or oral care.

	(mil.)	Share
Mid-priced dog food	2,162.5	25.80%
Standard premium dog food	1,966.3	23.46
Economy dog food	1,732.8	20.67
Mid-priced cat food	778.0	9.28
Economy cat food	534.0	6.37
Standard premium cat food	514.8	6.14
Superpremium dog food	512.1	6.11
Superpremium cat food	160.4	1.91
Cat treats and mixers	20.5	0.24

Source: *Petfood Industry*, August 2008, p. NA, from Euro-monitor.

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Pet Food Sales, 2008

Sales are shown for the food stores, drug stores and mass merchandisers for the 52 weeks ended March 22, 2008.

Dog food, dry	\$ 1,775.70
Cat food, dry	1,070.30
Cat food, wet	995.10
Dog food, wet	636.10
Dog food, moist	47.60
Cat food, moist	0.16

Source: *Pet Aisle - A Supplement to Grocery Headquarters*, June 2008, p. 18, from Nielsen.

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Pet Food Sales in the U.K., 2008

The pet food market was approximately 1.7 billion pounds sterling for the 52 weeks ended August 10, 2008. Tesco claimed 28.8% of the pet food market, Asda was next with 16.3% and Sainsbury's had 13.6% of sales.

Wet cat food single	30.3%
Wet dog food	17.0
Dry dog food	16.0
Dog treats	14.7
Dry cat food	10.0
Wet cat food multi	9.7
Other	2.3

Source: *Grocer*, November 1, 2008, p. 47, from TNS World-panel.

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Top Cat Snack/Beverage Brands, 2008

Market shares are shown based on sales at supermarkets, drug stores and mass merchandisers (excluding Wal-Mart) for the 52 weeks ended January 25, 2009.

Whiskas Temptations	39.7%
Purina Whisker Lickins Crunchy Lovers	7.4
Friskies	6.0
Pounce	5.8
Friskies Party Mix	5.0
Goodlife Recipe	4.9
Purina Whisker Lickins	3.5
Purina Whisker Lickins Kluckers	2.6
Other	25.1

Source: *Grocery Headquarters*, April 2009, p. 66, from Information Resources Inc.

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Top Cat Snack/Beverage Makers, 2008

Market shares are shown based on sales at supermarkets, drug stores and mass merchandisers (excluding Wal-Mart) for the 52 weeks ended January 25, 2009.

Mars Inc.	48.8%
Nestlé Purina PetCare Co.	34.5
Del Monte Foods	9.8
The Meow Mix Co.	2.0

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Top Cat Snack/Beverage Makers, 2008

Market shares are shown based on sales at supermarkets, drug stores and mass merchandisers (excluding Wal-Mart) for the 52 weeks ended January 25, 2009.

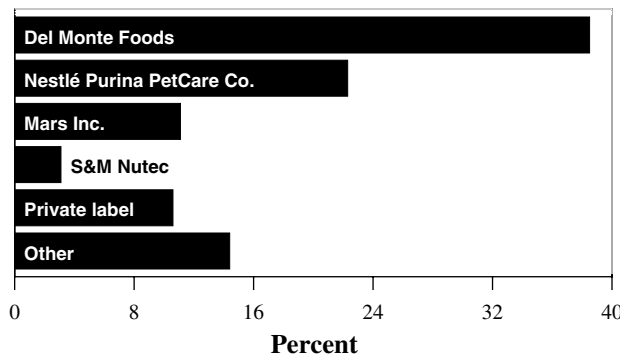
S&M Nutec	1.3%
Other	3.6

Source: *Grocery Headquarters*, April 2009, p. 66, from Information Resources Inc.

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Top Dog Biscuit/Treat/Beverage Makers, 2008

Market shares are shown based on sales at supermarkets, drug stores and mass merchandisers (excluding Wal-Mart) for the 52 weeks ended January 25, 2009.

Del Monte Foods	38.5%
Nestlé Purina PetCare Co.	22.3
Mars Inc.	11.1
S&M Nutec	3.1
Private label	10.6
Other	14.4

Source: *Grocery Headquarters*, April 2009, p. 52, from Information Resources Inc.

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Top Dog Biscuit/Treats/Beverage Brands, 2008

Market shares are shown based on sales at supermarkets, drug stores and mass merchandisers (excluding Wal-Mart) for the 52 weeks ended June 15, 2008.

Milkbone	12.8%
Beggin Strips	9.4
Pup Peroni	4.9
Purina Busty Bone Dog	4.7
Milkbone Flavor Snacks	4.1
Greenies	3.3
Pedigree Jumbone	2.6
Private label	10.4
Other	47.9

Source: *Center Store - A Supplement to Grocery Headquarters*, August 2008, p. 42, from Information Resources Inc.

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Top Dry Cat Food Brands, 2008

Market shares are shown based on sales at supermarkets, drug stores and mass merchandisers (excluding Wal-Mart) for the 52 weeks ended January 25, 2009.

Meow Mix	10.8%
Purina Cat Chow	8.9
Iams	8.6
Purina Cat Chow Indoor Formula	6.1
Friskies	6.0
Purina Kit N Kaboodle	4.8
Private label	8.5
Other	46.3

Source: *Grocery Headquarters*, April 2009, p. 52, from Information Resources Inc.

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Top Dry Cat Food Makers, 2008

Market shares are shown based on sales at supermarkets, drug stores and mass merchandisers (excluding Wal-Mart) for the 52 weeks ended January 25, 2009.

Nestlé Purina PetCare Co.	52.8%
Procter & Gamble	13.8
The Meow Mix Co.	13.7
Mars Inc.	3.9

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Top Dry Cat Food Makers, 2008

Market shares are shown based on sales at supermarkets, drug stores and mass merchandisers (excluding Wal-Mart) for the 52 weeks ended January 25, 2009.

Private label	8.5%
Other	7.3

Source: *Grocery Headquarters*, April 2009, p. 52, from Information Resources Inc.

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Top Dry Dog Food Brands, 2008

Market shares are shown based on sales at supermarkets, drug stores and mass merchandisers (excluding Wal-Mart) for the 52 weeks ended June 15, 2008.

Iams	15.4%
Purina Beneful	12.4
Purina O N E	9.3
Purina Dog Chow	6.5
Pedigree Mealttime	5.9
Kibbles N Bits	4.8
Pedigree	3.9
Other	41.8

Source: *Center Store - A Supplement to Grocery Headquarters*, August 2008, p. 42, from Information Resources Inc.

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Top Dry Dog Food Makers, 2008

Market shares are shown based on sales at supermarkets, drug stores and mass merchandisers (excluding Wal-Mart) for the 52 weeks ended June 15, 2008.

Nestlé Purina PetCare Co.	44.4%
Procter & Gamble	16.9
Masterfoods USA	16.2
Del Monte Foods	8.4
DAD's Products Co.	1.7
Nunn Milling Co Inc.	0.7
Sunshine Mills Inc.	0.7
Private label	8.8
Other	2.1

Source: *Center Store - A Supplement to Grocery Headquarters*, August 2008, p. 42, from Information Resources Inc.

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Top Natural Pet Treats/Snacks, 2007

Brands are ranked by sales at supermarkets, drug stores and mass merchandisers (excluding Wal-Mart) for the 52 weeks ended December 29, 2007.

	(\$ mil.)	Share
Greenies	\$ 24.16	51.56%
Blue Dog	4.06	8.66
Dogswell	3.95	8.43
Three Dog Bakery	3.00	6.40
Newman's Own Organics	2.59	5.53
Feline Greenies	2.49	5.31
Nylabone	1.32	2.82
Zen Puppy	1.00	2.13
Natural Way	0.67	1.43
Beggar	0.63	1.34
Other	2.99	6.38

Source: *Natural Foods Merchandiser*, June 2008, p. 46, from SPINScan.

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Top Pet Food Makers in Japan, 2007

Mars Japan was the leading maker of dog food, with a 16% share. Nestlé Purina Petcare claimed 21% of the cat food market.

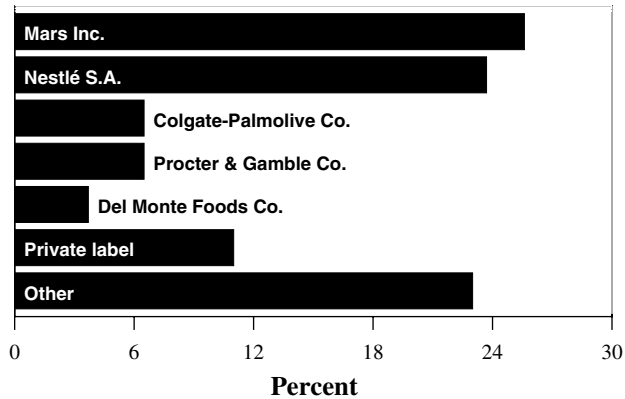
Mars Japan Inc.	13.9%
Hill's-Colgate (Japan) Ltd.	9.9
Unicharm PetCare Corp.	9.9
Nestlé Purina Petcare	9.2
Nisshin Pet Food Inc.	5.9
Nihon Pet Food	5.0
Procter & Gamble Japan	4.0
PETLINE	3.7
Yamahisa	3.5
Doggy Man H.A. Co. Ltd.	3.4
Other	31.6

Source: "Japan Market Development Reports Pet Food." [online] from <http://ffas.usda.gov> [Published May 7, 2009] from *Pet Business Hand Book, 2009* and Sankei-Shimbun Medics.

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Top Pet Food Makers Worldwide, 2007

Market shares are shown in percent.

Mars Inc.	25.6%
Nestlé S.A.	23.7
Colgate-Palmolive Co.	6.5
Procter & Gamble Co.	6.5
Del Monte Foods Co.	3.7
Private label	11.0
Other	23.0

Source: *Petfood Industry*, December 8, 2008, p. NA, from Euromonitor.

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Top Pet Snack Makers, 2008

Market shares are shown based on sales at supermarkets, drug stores and mass merchandisers (excluding Wal-Mart) for the 52 weeks ended April 26, 2008.

Del Monte	30.0%
Nestlé	21.0
Mars	18.0
Private label	12.0
Other	19.0

Source: "Del Monte Foods." [online] from http://media.corporate-ir.net/media_files/irol/86/86259/FactSheetQ1FY09.pdf [Published September 2008].

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Top Wet Cat Food Brands, 2008

Market shares are shown based on sales at supermarkets, drug stores and mass merchandisers (excluding Wal-Mart) for the 52 weeks ended June 15, 2008.

	(\$ mil.)	Share
Friskies Fancy Feast	\$ 325.8	32.98%
Friskies	207.3	20.99
9 Lives	94.3	9.55
Friskies Fancy Feast Elegance . . .	56.8	5.75
Meow Mix Market	34.0	3.44
Whiskas Choice Cuts	31.0	3.14
Friskies Special Diet	28.0	2.83
Friskies Prime Filets	21.8	2.21
Sheba Premium Cuts	20.9	2.12
9 Lives Plus	14.5	1.47
Private label	51.7	5.23
Other	101.7	10.30

Source: *MMR*, August 11, 2008, p. 43, from Information Resources Inc.

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Top Wet Cat Food Makers, 2008

Market shares are shown based on sales at supermarkets, drug stores and mass merchandisers (excluding Wal-Mart) for the 52 weeks ended June 15, 2008.

Nestlé Purina PetCare Co.	69.7%
Del Monte Foods	11.0
Masterfoods USA	7.4
The Meow Mix Co.	4.4
Private label	5.2
Other	2.3

Source: *Center Store - A Supplement to Grocery Headquarters*, August 2008, p. 42, from Information Resources Inc.