



SPINS Pet Trends 2020

What's Driving Today's Pet Parents





We Love Pets.

No matter how hectic the world may be, or even in the midst of a global pandemic, pets will always be a consistent and positive source of companionship in our lives.

Whether you have a dog, cat, fish, bird, or reptile, you love your pets like they're part of the family. And judging by today's trends, pet owners are taking this mentality to the store aisles.

Over the last 25 years, the pet industry has grown steadily, evolving from a simple but sizeable industry into a complex, booming

one.¹ During this time, American pet owners have incrementally increased their year-over-year spend, resulting in 450% growth. Each year, pet parents are spending \$49 billion on pet care, which includes food, treats, and supplies.²

In other words, pet owners are investing in their 4-legged (and 2-legged and gilled) friends.

Who Are Today's Natural Pet Owners?

Pet owners are synonymously known as pet parents or pet mothers and fathers, in turn, making their dogs and cats their 'fur babies.' Whatever you call yourself (and your pets), just know that you're in good company. According to data from IRI All Outlet Panel that is enhanced with SPINS Product Attribution, nearly 7-in-10 households have purchased pet food and treats in the past year.

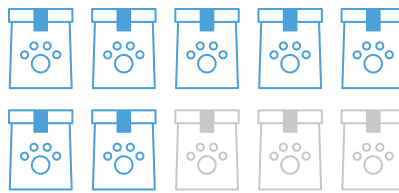
In fact, today's pet parents are making multiple trips to the store. In the past year, 61% of households bought pet food and treats at least twice:

- 35% of households bought dog food
- 28% of households bought cat food
- 28% of households bought dog treats

Looking specifically at natural, specialty, and wellness pet shoppers, 30% of households have bought pet food and treats at least twice in the past year:

- 13% of households have bought dog food
- 13% of households have bought dog treats
- 6.7% of households have bought cat food

A popular Twitter account that simply spotlights cute dogs shifted the way we talk about these loveable creatures and how we imagine what they're thinking. It might seem small, but it's the perfect embodiment of how we care for our pets. For several years, experts in the industry have been talking about the humanization of pets, a trend that reflects millennials' increasing tendency to pamper their animals



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7-in-10

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30%

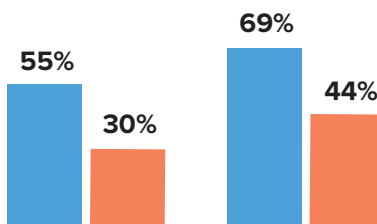
of natural, specialty, and wellness pet shopper households have bought pet food and treats at least twice in the past year.

Source: IRI All Outlet Panel, enhanced with SPINS Product Attribution

Millennials accounted for

43%

of pet owner growth between 2007 to 2015.



Open to trying holistic and natural-branded nutritional pet supplements

Likely to consider foods with naturally-made ingredients

■ Millennial pet owners
■ Older pet owners

Source: Packaged Facts

similarly to how they may pamper themselves: reading the labels on foods, choosing high quality ingredients, and even treating them to luxuries like high-end clothing and spa days. By now you probably know that it's no trend—it's today's default style, and you can thank the changing demographics for that.

The Millennial Shift

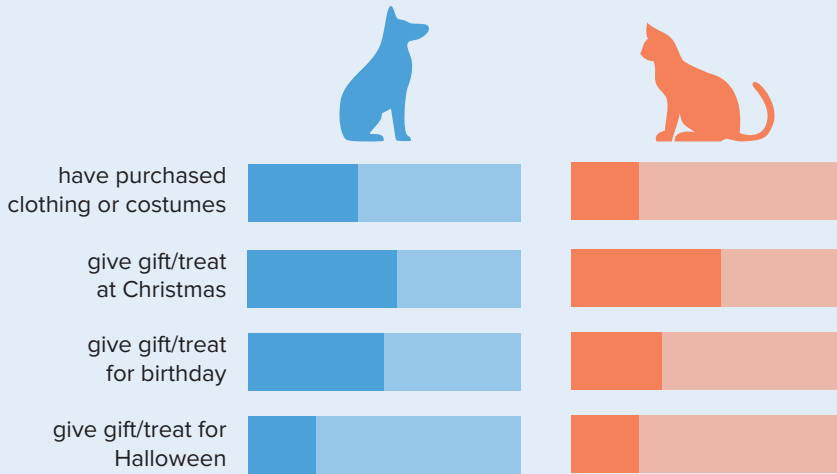
Millennials aren't the first pet owners to view their pets as part of the family—they just happen to have the numbers and social savvy to bring this mentality to the mainstream. Today, 1 in 3 pet owners is a millennial, and between 2007 and 2015, millennials accounted for 43% of pet owner growth.³

Research from *Packaged Facts* also finds:

- 55% of millennial pet owners vs 30% of older pet owners are open to trying holistic and natural-branded nutritional pet supplements prior to conventional pet medication
- 69% of millennial pet owners vs 44% of older pet owners are likely to consider foods with natural ingredients over mass-produced foods
- 75% of millennial dog owners and 64% of millennial cat owners identify fear of pet food contamination or product safety as a key consideration in the foods they buy

So you might not be surprised that today's pet owners (or pet parents) bring the same scrutiny to labels and concern for quality to the pet store that they take to the grocery aisle.

PETS GET THE BEST FROM THEIR OWNERS



Source: FINN CADY

Pets Deserve the Best

That concern for better foods and medications is indicative of a growing desire to give pets the best life possible. Research firm FINN CADY finds that pet owners view food as a major component in their pets' well-being:⁴

- Approximately 60% of dog and cat owners are very or somewhat concerned about their pet's nutrition
- Approximately 8 in 10 dog and cat owners strongly or somewhat agree that what their pet eats impacts his or her health
- More than 8 in 10 dog and cat owners strongly or somewhat agree that what their pet eats affects his or her lifespan
- Nearly 8 in 10 dog and cat owners strongly or somewhat agree that what their pet eats affects his or her happiness

Pets Get the Best

We're not just buying high-quality treats and foods for our fluffiest family members. They have birthday reminders on our calendars and a spot on holiday shopping lists. According to research from FINN CADY,

- More than 40% of dog owners and 25% of cat owners have purchased clothing or costumes for their pets. Dog owners are more likely to buy both clothing and costumes.
- More than ½ of dog and cat owners give their pets a gift or treat at Christmas
- Half of dog owners and approximately ⅓ of cat owners celebrate a pet's birthday with a treat or gift
- Nearly ¼ of dog and cat owners give their pets a gift or treat to celebrate Halloween

Brands and retailers can think about how they are communicating with and attracting pet owners beyond the kibble and cat nip to keep them

engaged year-round. Seasonal and personal events affect pet parents' buying patterns, whether that means grabbing a dog coat in the winter or a new cat toy to celebrate a holiday.

The COVID Bump

The effects of COVID-19 caused many Americans to stay at home for an extended period of time, whether it be due to shelter in place orders or work from home recommendations. Soon after this increased time at home, pet shelters saw a surprising and uplifting trend: a rise in adoptions and fostering. Suddenly homebound for the foreseeable future, workers decided they could now devote their time and energy to take on a new family member and shelters saw historic increases that cleared their cages. The wave of adoptions hasn't yet had a long-term effect on sales thanks to COVID. Because pet owners (new and existing alike) stockpiled kibble during the start of lockdown in March, they didn't return to the stores quite as frequently afterward, causing sales to gradually level off. However, there's still an opportunity to reach these customers—particularly the first-time pet owners—who are looking for education, exploring new foods and treats, and bringing their own lifestyle habits into the pet parenting styles.

Approximately

80%

of dog and cat owners strongly or somewhat agree that what their pet eats impacts its health.

Source: FINN CADY

What These Trends Tell You

Changing demographics certainly drive much of today’s pet trends, but that’s not the only factor. Today’s pet owners don’t view their dogs, cats, lizards, fish, and any other animal as simply pets. More than ever before, pets aren’t just part of the family—they’re possibly more spoiled than anyone in the household. The trends we explore in this report all have a common theme: providing pets with a great quality of life. For some shoppers, that means reading the ingredients labels. For others it’s about dietary needs. For everyone, it’s about making an informed choice.

Some trends are newer to the scene and others have been lurking for years and are finally considered mainstream. No matter what, they tell you that the days of transactional relationships with customers are over. Succeeding in the pet business means showing customers that you not only understand animals but that you care about them as if they were your own.



TREND 1

The Rise of Natural and Organic



TREND 2

Customizing the Pet Diet



TREND 3

The Struggle to Achieve Sustainability Inside and Out



TREND 4

Enriching the Neighborhood Store Experience

TREND 1

The Rise of Natural and Organic

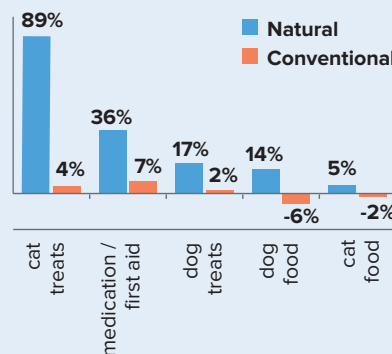
NATURAL’S UPWARD TRAJECTORY

Perhaps no trend reflects pet owners’ love for their pets more than the rising popularity of natural products. While the pandemic has disrupted shopping habits this year, shoppers are exploring natural products and causing retailers and brands to take notice. Neighborhood pet specialty stores understand the effect this trend is having on business, as 70% of their dollar sales come from natural, specialty, and wellness products.

The reason is simple: Pet owners care about what they’re putting in their pet’s food bowl. FINN CADY finds that nearly 2 in 3 dog and cat owners believe natural pet foods are best, and approximately 60% of dog and cat owners are very or

somewhat concerned about their pet’s nutrition. Meanwhile, *Packaged Facts* finds that 69% of millennial pet owners and 44% of owners over 35 are more likely to consider products with naturally-made ingredients versus conventional, mass-produced foods.

Growth Rates Between Common Natural and Conventional Products in the Past Year

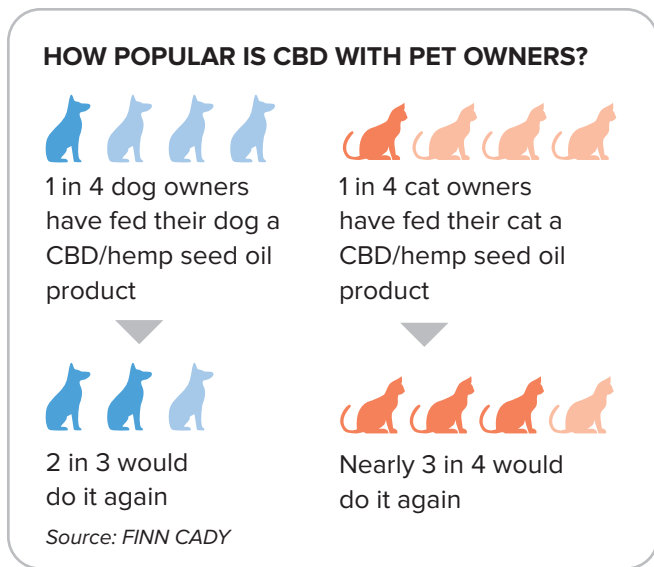


Source: SPINS Natural Enhanced Channel and MultiOutlet Channel NPI (powered by IRI) for the 52-week period ending July 12, 2020.)

Those views are playing out in real time at the checkout line. Natural’s strength is apparent when comparing growth rates between common natural and conventional products over the past year.

CBD: A Pet’s Best Friend

CBD’s explosive growth can likely be attributed to pet owners not only wanting to help their pets stay healthy, but also wanting to give them a good quality of life. Although CBD and hemp seed oil’s health benefits for animals are still being researched (and the FDA has yet to approve any CBD products for pets), pet owners have begun to make this functional ingredient a regular part of their pets’ daily routines. SPINS research finds that the top reasons pet owners rely on CBD oil and treats are for calming their pets’ nerves and joint relief. Additionally, a recent study from Colorado State University found that CBD oil did appear to have a correlation on



reducing seizures in dogs, although they are still unsure of its specific limitations.⁵

That versatility is a large reason why CBD pet product dollar growth has been in the triple digits year over year, and by 2022 its sales are expected to hit \$125 million.⁶ Today, SPINS data finds that 68% of dollar growth in CBD is coming from the subcategory of treats and 32% of dollar growth is in vitamins and supplements, a sign that pet owners want convenient ways to integrate it into their pets' diets. As the demand

grows and the industry innovates, expect CBD's product lineup to expand with treats and edibles as well.

🐾 TREND 2

Customizing the Pet Diet

ALL ABOUT THE ATTRIBUTES

Humans are no strangers to evolving diets; some are trends that come and go quickly, while others become part of our daily lifestyles. Today's pet diets are undergoing similar

shifts. When shoppers head to the pet store, they aren't just grabbing the biggest bag of kibble they can find. They're doing research before they arrive and reading labels before they head to the checkout line. (This might become even more popular in light of pets getting a little too many treats during the pandemic and putting on a few extra pounds.)⁷

When they're reading labels for their pets, shoppers often look for the same attributes that they look for in their own food. Pet owners are interested in high protein foods, natural ingredients, and minimal or no preservatives or artificial flavors. That mindset is evident in sales trends for dog and cat food, where attributes are attracting shoppers and influencing what lands in their baskets. Natural, specialty, and wellness-positioned products drive twice the growth of conventional products.

SPINS finds that attributes are driving growth throughout the market. When looking at dollar growth:

- For cat food, approximately 75% comes from natural-positioned and grain-free labeled



ATTRIBUTES DRIVING GROWTH

Product Type	Attributes	Dollar Growth
Cat Food	<ul style="list-style-type: none"> • natural-positioned • grain-free labeled • raw-positioned 	75%
Cat Treats	<ul style="list-style-type: none"> • natural-positioned • grain-free labeled 	67%
Vitamins and Supplements	<ul style="list-style-type: none"> • CBD 	60%
Dog Food	<ul style="list-style-type: none"> • natural-positioned • raw positioned • frozen 	35%
Dog Treats	<ul style="list-style-type: none"> • grain-free • gluten-free • raw-positioned 	31%

Source: SPINS

“Ultimately every pet owner wants their furry friend to have the longest, healthiest, and most comfortable life possible.”



- For cat treats, 67% comes from natural-positioned, grain-free labeled, and raw-positioned
- For vitamins and supplements, nearly 60% comes from CBD
- For dog food, approximately 35% comes from natural-positioned, raw-positioned, and frozen
- For dog treats, 31% comes from grain-free, gluten-free, and raw-positioned

PETS ARE EATING CLEAN, TOO

“Clean eating” does not have a strict definition, but most shoppers use this term when they’re focusing on whole (unprocessed) foods, avoiding artificial ingredients, and limiting or eliminating added salts and sugars. It’s a large umbrella term that can include a variety of additional attributes and categories within it, such as natural, organic, and plant-based.

Many of the pioneering brands that set the standard for natural and organic began with a clean-ingredients mindset. To them, clean has always been synonymous with natural and organic. These brands should emphasize this messaging on their packaging and in their marketing strategies to attract customers who might not realize they are already offering this latest trend. This move might also help natural and organic brands stay competitive as conventional retailers ban artificial ingredients from their shelves and conventional brands roll out their own natural and clean products.

LIMITED INGREDIENT CONTINUES TO RISE

While some pet owners are focused on eliminating artificial ingredients or ingredients they deem as lesser quality like by-products, others are simply trying to narrow the number

of ingredients in their pets’ diets. Limited ingredient diets favor foods that have a single source of protein rather than a combination of various proteins or meat byproducts. These foods might contain byproducts, but all of the protein sources are from the same animal. Although limited ingredient diets are not new, they have become a common choice for pet owners who suspect their pets have an allergy or food sensitivity. Limited ingredient diets are one way to strategically eliminate what ingredients your pet agrees with and what may cause a sensitivity.

GRAIN-FREE: YAY OR NAY

With consumers focusing on protein content, grain-free diets have gained traction and some controversy, similar to human diets such as paleo, keto, and Whole30. Because dog food often contains a high percentage of carbohydrates and low protein or



mixed protein sources, pet owners are gravitating toward grain-free choices. Similar to limited ingredient diets, grain-free is easily digestible for dogs and high in protein, which can help dogs stay fuller longer, shed less, and have shinier coats.⁸ They often contain starchy alternatives like peas, sweet potatoes, and lentils that are often viewed as “better-for-you” carbohydrates. And like limited ingredient diets, grain-free diets have the potential to reduce food allergies or sensitivities.

When it was revealed that dogs diagnosed with dilated cardiomyopathy (DCM) were on a grain-free diet, some medical experts wondered if there was a connection. In 2018, the FDA began investigating possible connections between the ailment and various dog breeds and their diets.⁹ The publicity had an adverse effect on sales, and brands hurried to emphasize the presence of certain grain in their products. Ancient grains became more popular as they were known for containing low or no gluten, having high fiber and protein content, and having a low glycemic index that benefits

pets dealing with diabetes or obesity. Two years later, the FDA and researchers agreed that the connection, if one exists, is more complex than simply grain-free diets. Dilated cardiomyopathy could be a combination of many factors, such as breed, overall health, and diet. As the *Journal of Animal Science* concluded, “Therefore, it is impossible to draw any definitive conclusions, in these cases, linking specific diets or specific ingredients to [dilated cardiomyopathy].”¹⁰

With no definitive answer just yet, research will continue and some dog owners will remain wary of grain. Although there is no proven link between the two matters, expect to see more packaging messaging about ancient grains or high protein content.

FUNCTIONAL INGREDIENTS FOR A LONGER LIFE

For discerning pet owners, food isn’t just a daily ritual for their dogs. It’s an opportunity to help these 4-legged friends live a little longer and stay healthier. That’s evident in the growing popularity of functional

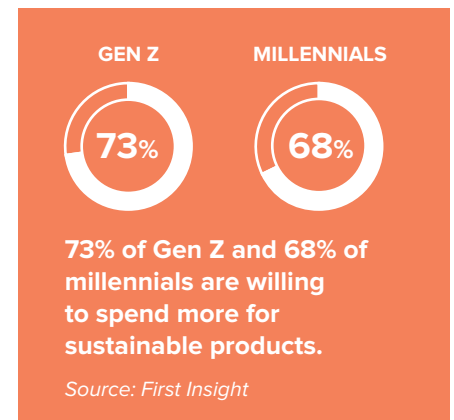
ingredients in dog diets, which means including ingredients that haven’t historically been associated with dog diets but are known to offer a specific health benefit. For example, a splash of goat milk in a bowl of kibble is not uncommon these days because it’s easily digestible and can prevent or help with kidney stones, diabetes, GI issues, and more.¹¹ You might even find that your customers are looking for fruits and vegetables—either in the ingredients list or as a supplement—since many of them provide the same benefits for dogs that they do for humans. Ultimately every pet owner wants their furry friend to have the longest, healthiest, and most comfortable life possible.

TREND 3

The Struggle to Achieve Sustainability Inside and Out

WHAT DO CONSUMERS WANT?

When consumers are reading labels, they’re not just thinking about what their pets are eating. They care about where that food was sourced from and what it means for the environment. Sustainability has been a growing focus for consumers across the retail space, and that includes pet parents. FINN CADY finds that sustainability is a top factor for customers purchasing cat food and millennials are more likely than other demographics to



value sustainable proteins. A study from First Insight finds that 73% of Gen Z and 68% of millennials are willing to spend more for sustainable products. Today's shoppers want to make eco-friendly purchases that will leave a small carbon footprint on the environment- but that can often get complicated.¹²

When talking about sustainable food for humans, a common talking point is how much waste goes into raising cattle and producing beef. The conversation also includes broader topics like working conditions, pollution from the supply chain, and the treatment of animals. Many of those concerns are the same for pet owners.

Many pet brands are already making headway into producing sustainable foods to meet growing public interest. Based on SPINS data, many pet food brands include and promote their sustainable ingredients: For example, The Honest Kitchen's cat food products are protein-rich and sourced from grass-fed beef and sustainable fisheries. The company promotes its commitment to "environmental, financial, social and ethical sustainability." In dog food and treats, Taste of the Wild highlights its sustainably raised salmon with a greater focus on high-quality protein sources. Brands like these are showing that sustainability-centric messaging is resonating with shoppers and could be a differentiator in crowded markets.

Trends like sustainability and clean diets can conflict when it comes to the use of byproducts. Controversially, by-products are the most commonly used animal ingredient. They are the parts of the animal that are often discarded because they are not from muscle tissue. The Association of American Feed Control Officials explains that these lesser-used parts of the animal

"Almost all the top 100 FMCG companies (in terms of revenue) have made bold declarations and commitments to drive sustainability over the coming years."

— Source: McKinsey

would not be approved for human consumption but are perfectly fine for pets to eat.¹³ In fact, byproducts are popular in limited ingredient diets because they come from the same animal as the rest of the protein. However, they can have negative connotations to consumers who shop with a more human-grade mentality and avoid ingredients that they consider to be of lower quality. The sustainability debate gets more interesting because foods with



byproducts use more or even all of the animal, producing less waste, which is a chief concern for many sustainability-centric shoppers. Keep an eye on which trend wins out or if both coexist with different audiences. For now, pet owners are caught weighing which choice appeals most to their values and pet brands and retailers have to decide which message resonates with consumers.

SUSTAINABILITY ISN'T JUST ABOUT THE INGREDIENTS

Sustainability is about more than just the ingredients in the product itself. According to the EPA, approximately 80 million tons (or a third) of all municipal solid waste comes from containers and packaging, with nearly half of that recycled. Public awareness over the past several years has led to a move away from single-use plastics and other less environmentally friendly options, resulting in shifting consumer habits and even local ordinances, such as bans on plastic straws and single-use shopping bags.¹⁴

This shift is already hitting the pet industry, but it's far from solved and the space for innovation and eventual outreach to consumers is great. Trade publication *Petfood Industry* points out that the trouble with pet food sustainable packaging is that the most popularly used type is not readily recyclable in most neighborhood recycling programs.¹⁵ McKinsey notes that shifting public opinion has also forced the hand of many fast-moving consumer goods (FMCG) brands: "Almost all the top 100 FMCG companies (in terms of revenue) have made bold declarations and commitments to drive sustainability over the coming years."¹⁶ Even zero-waste grocery stores are popping up throughout the country with the aim of eliminating all plastic and food packaging from grocery outlets.

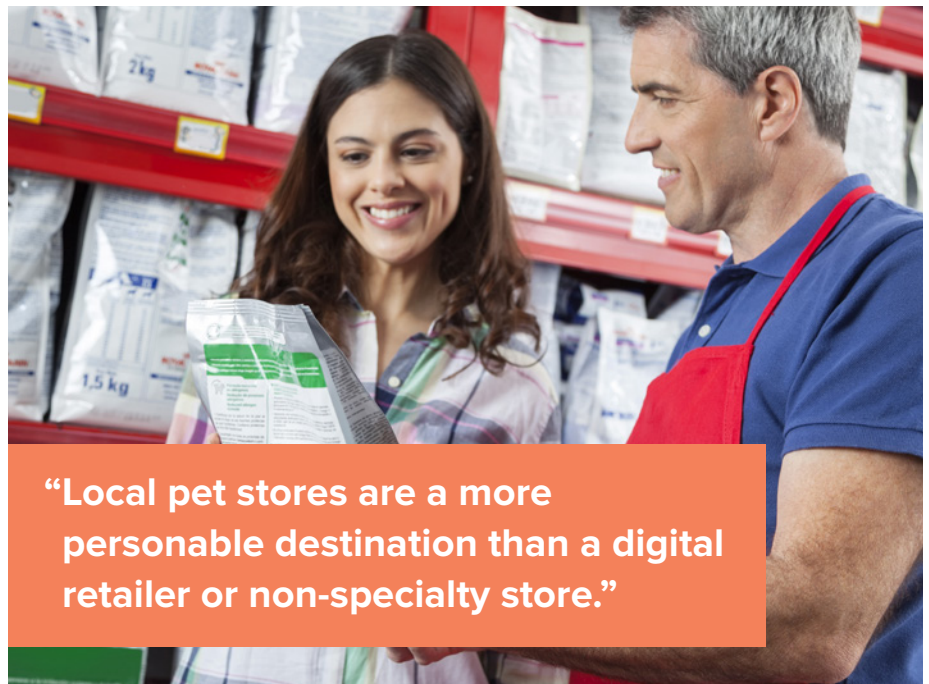
Already we've seen non-food pet products tap into this trend. Brands like Cocokitty and Bark Potty implement sustainability and waste reduction into their philosophies. Cocokitty is an organic, biodegradable, compostable, plant-based kitty litter from coconut pith. Coconut pith is already a waste product and can be reused as a natural garden fertilizer. For canine owners, Bark Potty is an all-natural, disposable pee pad made of real bark, and a single Bark Potty pad replaces up to 60 pee pads. As brands continue to do their part to minimize waste, expect more consumers to read packaging labels for sustainably sourced food ingredients and recyclable or eco-friendly packaging.

TREND 4

Enriching the Neighborhood Store Experience

WHERE ARE PET OWNERS SHOPPING?

For pet owners, and every other consumer, convenience is crucial, however, convenience does not have a straight forward definition and can mean something different for each person. Maybe that means online ordering and home delivery. It could mean curbside pickup. Maybe it means a knowledgeable staff who can make sense of the conflicting information that's found online. Or, it might be a combination of all of the above. According to *Packaged Facts*, online shopping for pet owners is growing quickly year over year. In 2012, 6% of pet owners strongly agreed that they were buying more pet products online than they used to; in just another 6 years it was nearly a quarter of shoppers.¹⁷ In other words, pet owners are shopping everywhere.



“Local pet stores are a more personable destination than a digital retailer or non-specialty store.”

Prior to COVID-19, *Packaged Facts* projected that 23% of the pet market will be from online sales. Last year, estimated online revenue for pet products was \$11 billion. For the neighborhood pet store, this might feel daunting, especially against some of the eCommerce Goliaths out there. This year's quick rise in eCommerce came from the effects of the pandemic and is becoming a mainstay for today's shoppers, but that doesn't mean it's the only way to succeed in 2020. It's just part of an overall omnichannel approach that reaches customers in the digital and brick and mortar spaces.

As shoppers consolidated their trips to the store during this year's pandemic lockdown, they also shifted to online purchasing. In April and May, according to data from IRI All Outlet Panel, enhanced with SPINS Product Attribution, internet shopping reached its high, earning just above 20% of share of wallet, clearly taking traffic from pet outlets. Internet purchases have subsided in recent weeks but remain well ahead of pre-pandemic levels, while the volume has not fully returned to pet outlets either.

INDEPENDENT IS A DIFFERENTIATOR

As we mentioned earlier, natural and organic is growing more quickly than conventional in several areas, and evolving trends are creating a less transactional shopping experience for consumers. This is where independent retailers are providing unique value to customers. Local pet stores are a more personable destination than a digital retailer or non-specialty store, with the staff to answer questions, stay on top of emerging trends, and suggest new products that might not be carried anywhere else yet. Shoppers will continue to go online and grab items at the grocery store, but they're not forming relationships with those outlets.

Independent retailers have the opportunity to connect with consumers who see convenience as having a knowledgeable staff to answer questions and recommend products. Staying on top of the trends and filling the shelves with in-demand, high quality products can go a long way for the independent retailer.

How to Focus On Quality and Succeed

Now that you have a better view of how the industry has changed and where it's going, you can build your strategy to succeed and grow. With customers who care about providing the best quality of life to their pets, you have several ways to appeal to their interests, whether you're an emerging brand, a market leader, or a retailer. The key to success is bringing a personal connection to the customer experience and differentiating yourself.



EMPHASIZE ATTRIBUTES

Shoppers are reading labels, doing research, and keeping up with the trendiest options on the market. If you have products with CBD, sustainable foods (and packaging), or natural and organic treats, highlight those qualities. Don't risk customers overlooking what you have to offer. Get these attributes front and center so you can attract customers who know what they want.



ESTABLISH A RELATIONSHIP

Neighborhood retailers have the best opportunity to talk to pet parents 1-on-1 and be the educational resource they're looking for. By offering new-to-the-market products they can't yet find anywhere else, you also show that you're on top of the latest innovations. Show these customers you can provide guidance—especially in these highly stressful times—and that you have their pet's best interest in mind.



GET WELL-VERSED IN SUSTAINABILITY

From ingredients to packaging to non-food products, sustainability is on the rise and still has room for innovation. Be prepared for consumers to seek out products that show responsibility across all aspects of production, from raising the livestock to sourcing the ingredients to packaging the product. As more retailers and brands pop up to meet the growing demand, it's not a trend you can afford to fall behind on.



LEAN INTO OMNICHANNEL

Consumers like quick and efficient experiences that alleviate any stress from their busy lives. Find the right eComm partner to help you create a strong omnichannel presence, whether that means online ordering and delivery, curbside pickup, or a strong online presence to augment your brick and mortar presence. When you can bring together traditional retail with eCommerce, you can become your shopper's go-to resource and build that personal connection, too.

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“The pandemic has created a unique opportunity and a captive audience for both pet brands and retailers to experience expedited growth as people acquired all available pets from shelters and stores—a trend that is expected to continue for the foreseeable future. Now more than ever, having the right data and expert insights, like those available through the SPINS Neighborhood Pet Channel, at their fingertips will help businesses make decisions that will position them for success in the future.”

– TONY OLSON, OWNER AND CEO OF SPINS

Email growth@spins.com to get in touch with a pet industry expert and visit spins.com/pet to learn more.

