



CommercelQ


INDUSTRY REPORT

# CategoryIQ

## Pet Food

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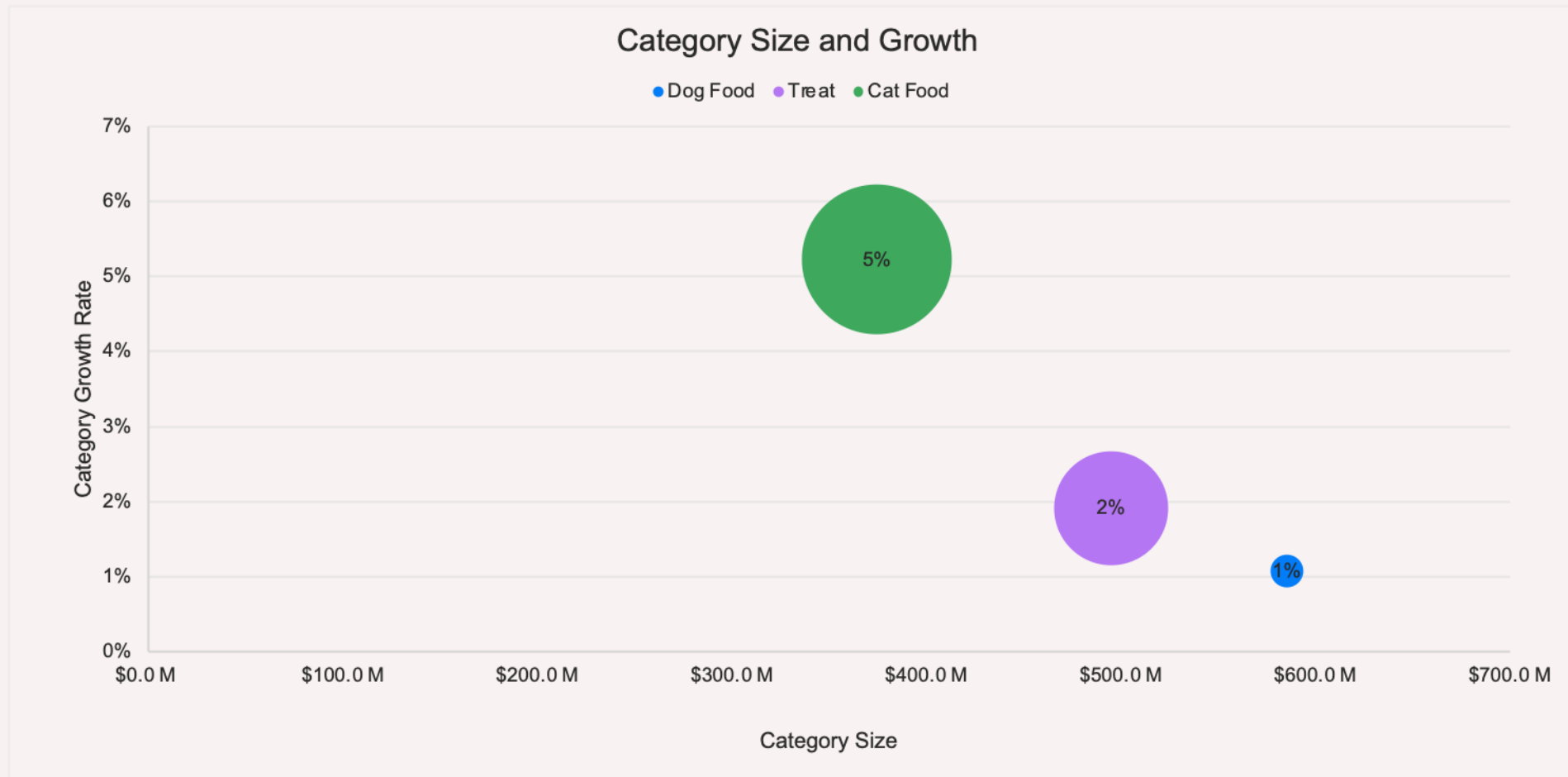
## On average, categories have grown by 3.4%, indicating a positive market trend

### Takeaway

The category size for Cat Food grew 5.2% from \$356M to \$375M

Cat Food experienced growth indicating increased consumer demand

The Treat category grew 1.9% from \$486M to \$495M



# Competitor Watch: Top Gainers and Losers

Top Gainers					Top Losers				
Category									
Cat Food	Friskies 9.8% (0.8%)	Purina Fancy Feast 17.5% (0.6%)		Blue Buffalo 7.9% (-0.4%)		Wellness 2.7% (-0.3%)			
Dog Food	Purina Pro Plan 14.3% (1.6%)	Purina One 6.5% (0.5%)		Blue Buffalo 10.7% (-0.9%)		Taste Of The Wild 0.5% (-0.4%)			
Treat	Inaba 3.5% (0.6%)	Temptations 4.0% (0.5%)		Smartbone 1.5% (-0.7%)		Better Belly 0.3% (-0.3%)			



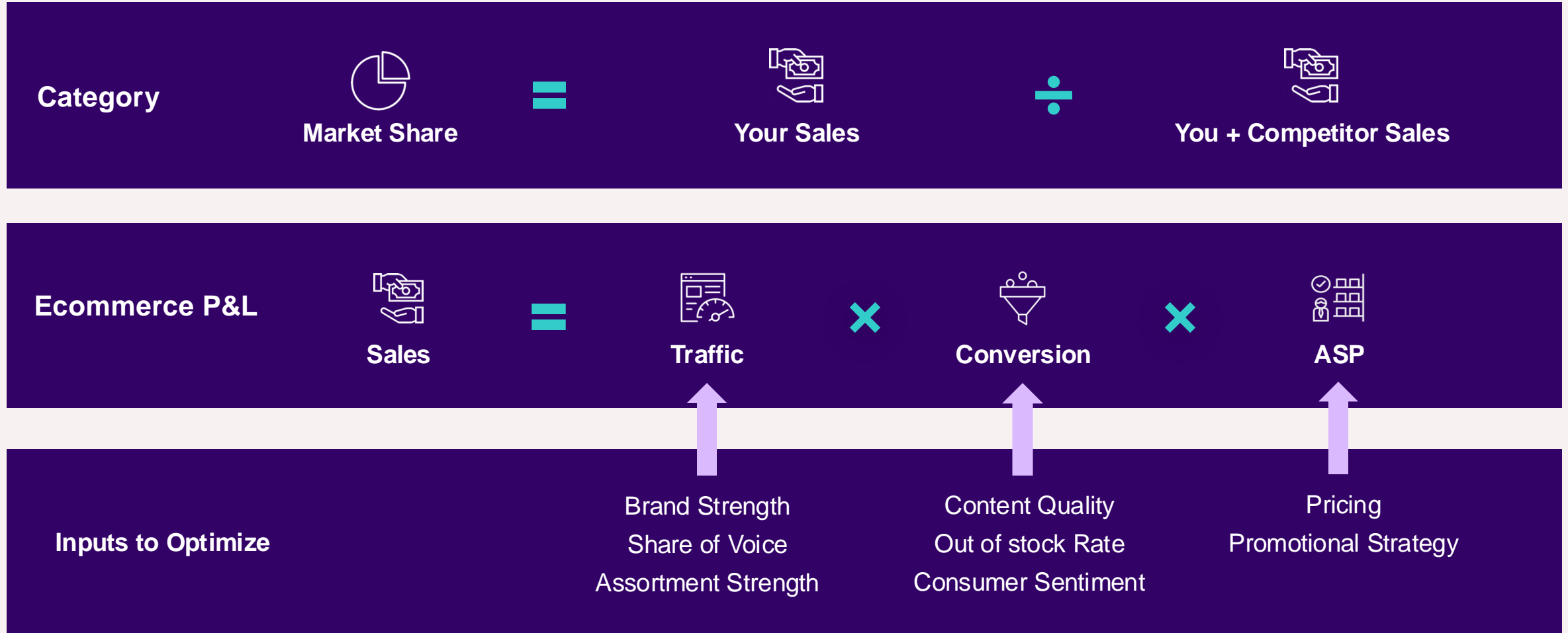
# Category Deep Dive

Cat Food



# The Commerce Playbook hasn't changed

But the key factors are more interconnected and dynamic



# Competitive Benchmarking – Top Brands

Friskies and Purina Fancy Feast Gain Market Share While Hills Pet Nutrition Faces Challenges

			Traffic			Pricing	
Brand	Market share	Sales	Brand Strength	Organic SoV	Sponsored SoV*	ASP	Promo Rate
Purina Fancy Feast	17.5% (0.6%)	\$65.6M (9.0%)	8.7% (0.1%)	19.4% (0.0%)	10.2% (2.5%)	\$20.3 (-1.8%)	1.7% (1.2%)
Friskies	9.8% (0.8%)	\$36.5M (14.6%)	3.7% (-0.3%)	13.4% (-1.0%)	1.1% (-2.2%)	\$20.4 (1.9%)	5.3% (4.6%)
Hill's Pet Nutrition	9.7% (-0.2%)	\$36.3M (2.7%)	2.2% (-0.2%)	4.0% (0.9%)	10.1% (1.1%)	\$42.6 (-3.5%)	11.4% (10.4%)
Blue Buffalo	7.9% (-0.4%)	\$29.5M (0.6%)	1.7% (-0.2%)	5.3% (-0.5%)	11.5% (0.0%)	\$29.3 (-1.9%)	4.1% (1.3%)
Purina Pro Plan	6.8% (0.3%)	\$25.4M (9.3%)	0.9% (-0.1%)	3.3% (0.4%)	5.4% (-0.7%)	\$37.1 (-2.2%)	0.1% (-0.3%)
Purina One	6.1% (0.0%)	\$22.7M (5.4%)	2.6% (-0.2%)	6.5% (0.0%)	1.1% (-1.5%)	\$24.4 (-0.9%)	1.9% (0.6%)
Iams	4.8% (-0.1%)	\$18.0M (3.9%)	3.9% (-0.9%)	4.4% (-0.9%)	4.5% (0.4%)	\$24.0 (0.3%)	3.9% (2.7%)

## Takeaway

Friskies gained market share (from 9.8% to 10.6%) in category Cat Food

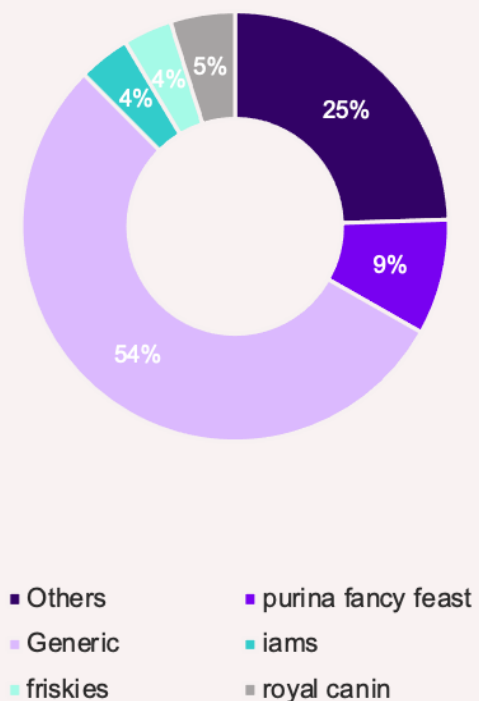
No major adjustments were noticed in ASPs, but top brands scaled up promotions

Purina Fancy Feast scaled up advertising, growing their Sponsored SoV to 10% from 7.5%

# Traffic Drivers – Search Behavior

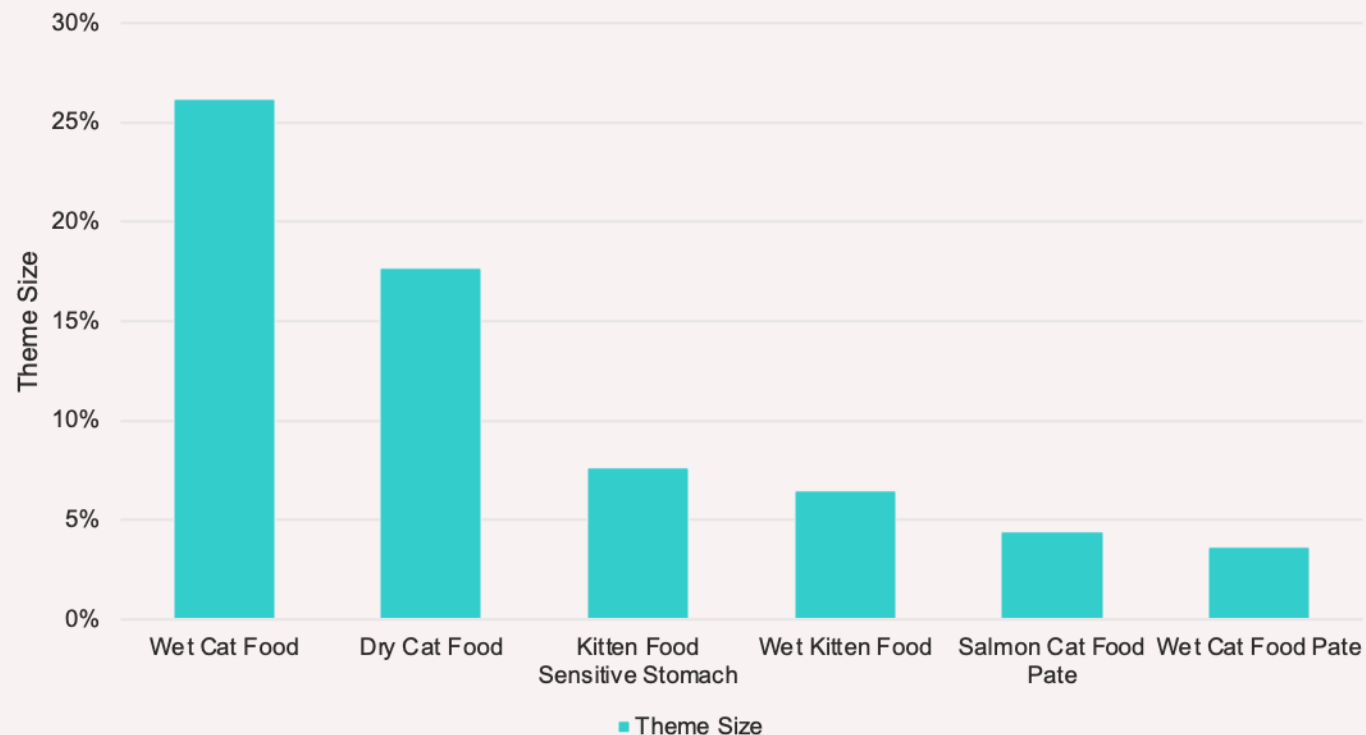
You lost ground in Dry Cat Food and Cat Gravy while growing share in Wet Cat Food

Amazon: Search Traffic Behavior



**8 %** of category search is directly for **Purina Fancy Feast** products

Shopper Search Themes



## Takeaway

Purina Fancy Feast leads with 30.2% in the Cat Gravy theme

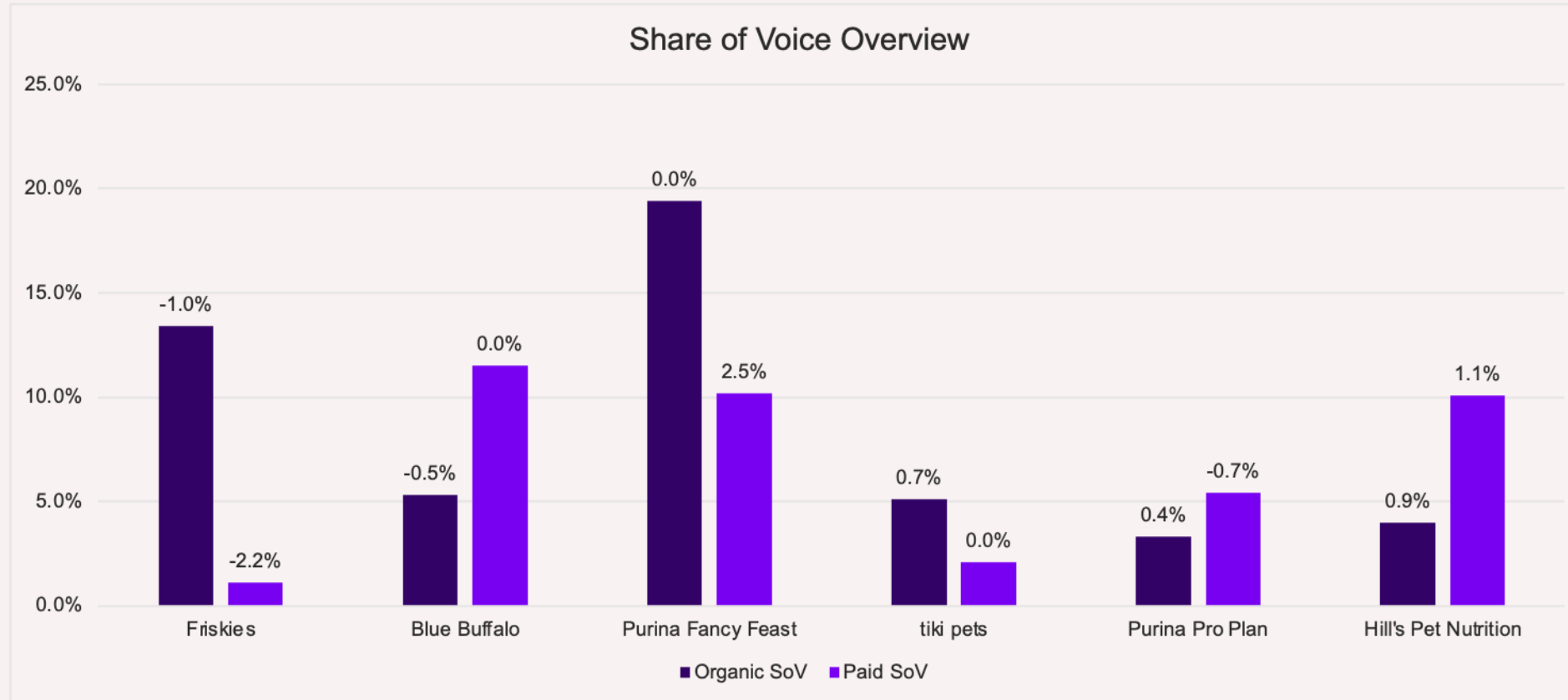
In Dry Cat Food theme 9lives have 4%

Blue Buffalo gained significant presence in Wet Kitten Food with a 20.79% share



# Traffic Drivers – Share of Voice

Quarterly E-commerce Performance Insights



## Takeaway

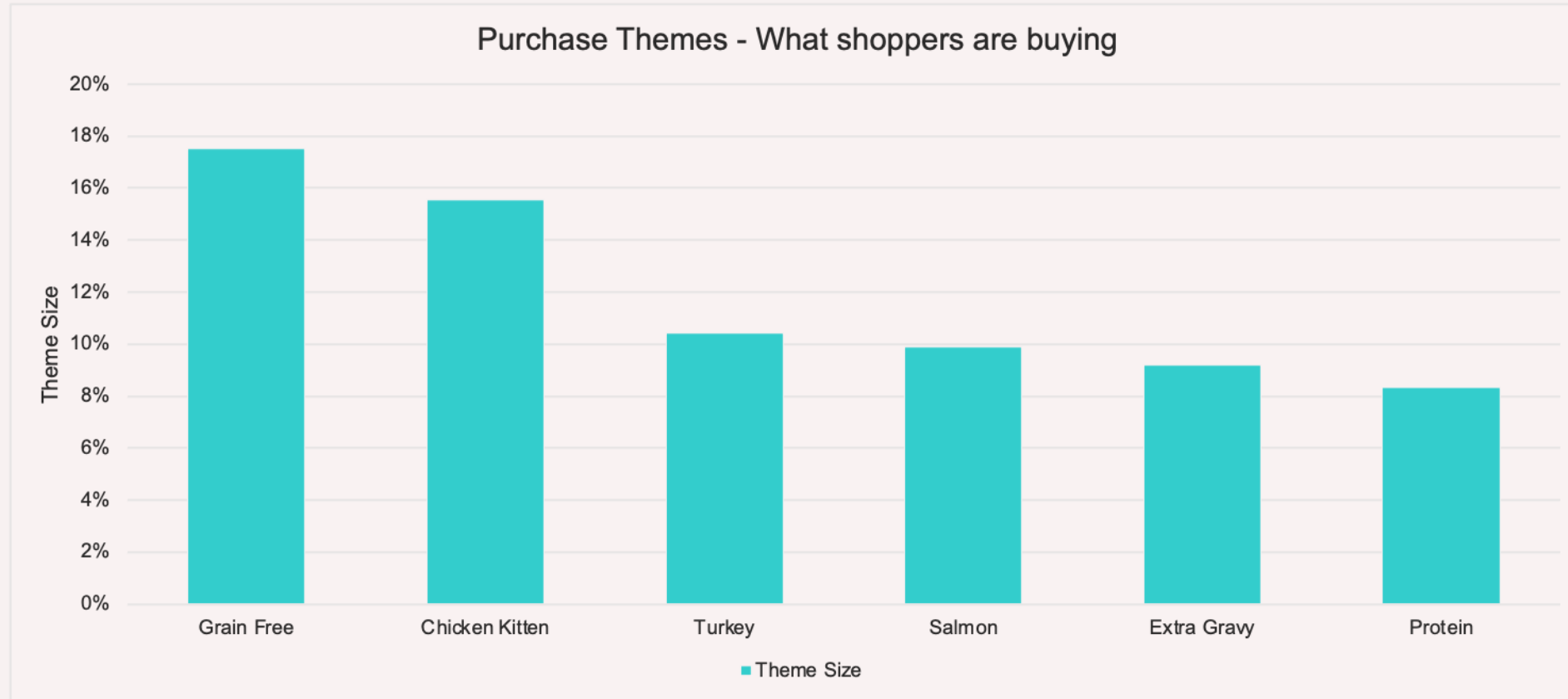
Purina Fancy Feast leads in paid presence growth, increasing to 10% from 7.5% - grew by 2.5%

Friskies experienced a decline in both organic and paid presence, with market share dropping from 10.75% to 9.75% - declined by 1%



# What shoppers are buying

Grain Free and Chicken Kitten show potential for growth



## Takeaway

Grain Free has the highest theme share at 17.5%

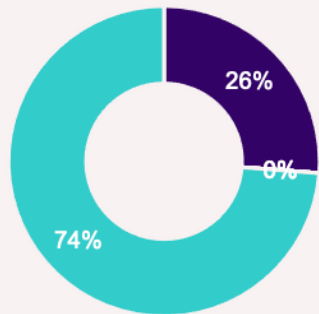
In Chicken Kitten, indicating untapped potential, no brand holds dominance

# What shoppers are buying

Friskies dominates Extra Gravy, while Sheba leads in Salmon

## Extra Gravy

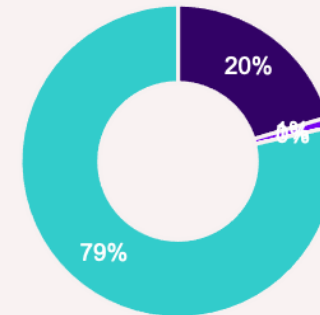
Top Brand Share



■ Friskies ■ Power Paw Products ■ Purina Veterinary Diets ■ Others

## Salmon

Top Brand Share



■ Sheba ■ tiki pets ■ Purina Veterinary Diets ■ Others

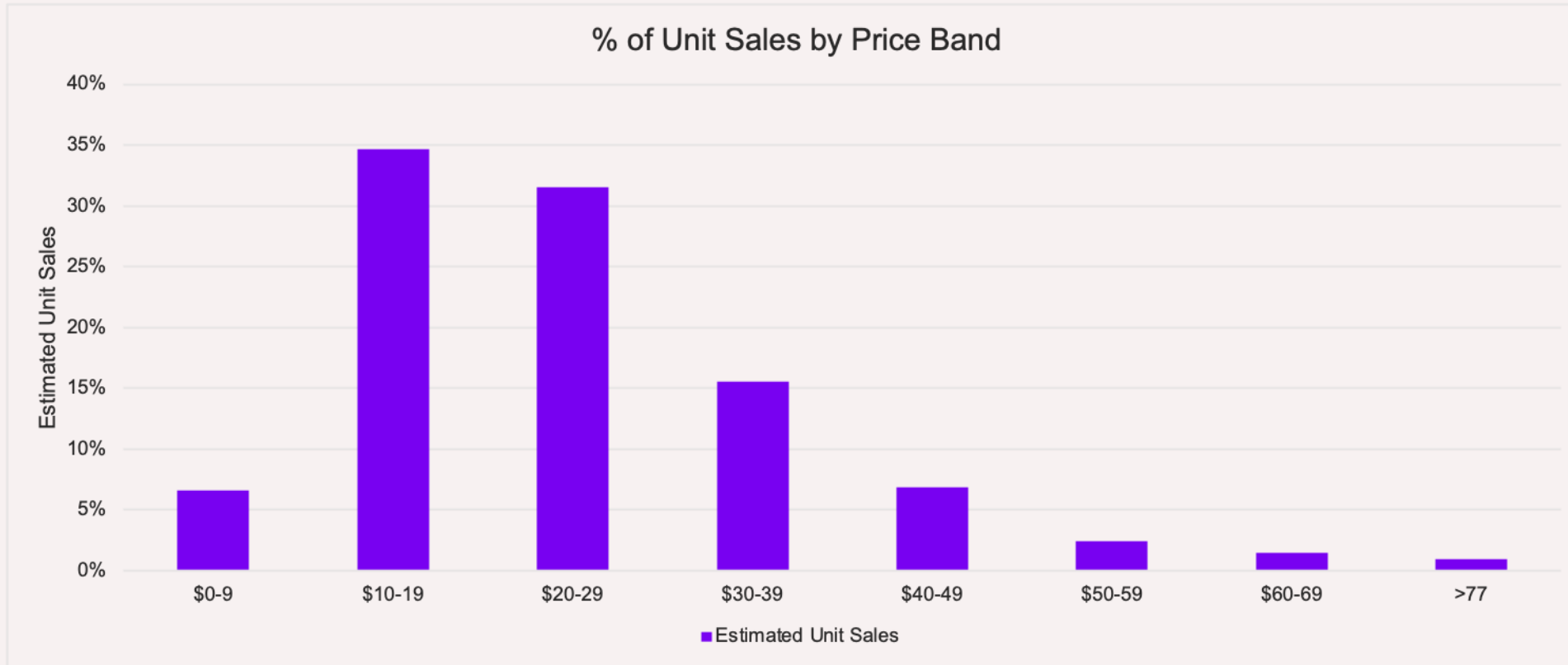
## Takeaway

In Extra Gravy, Friskies leads with 26.2% share; there is highly contested with over 50% share by top brands

In Salmon, Sheba has the highest share at 20.4%

# Pricing Architecture – Unit Sales by Price Band

## Price Band Analysis



## Takeaway

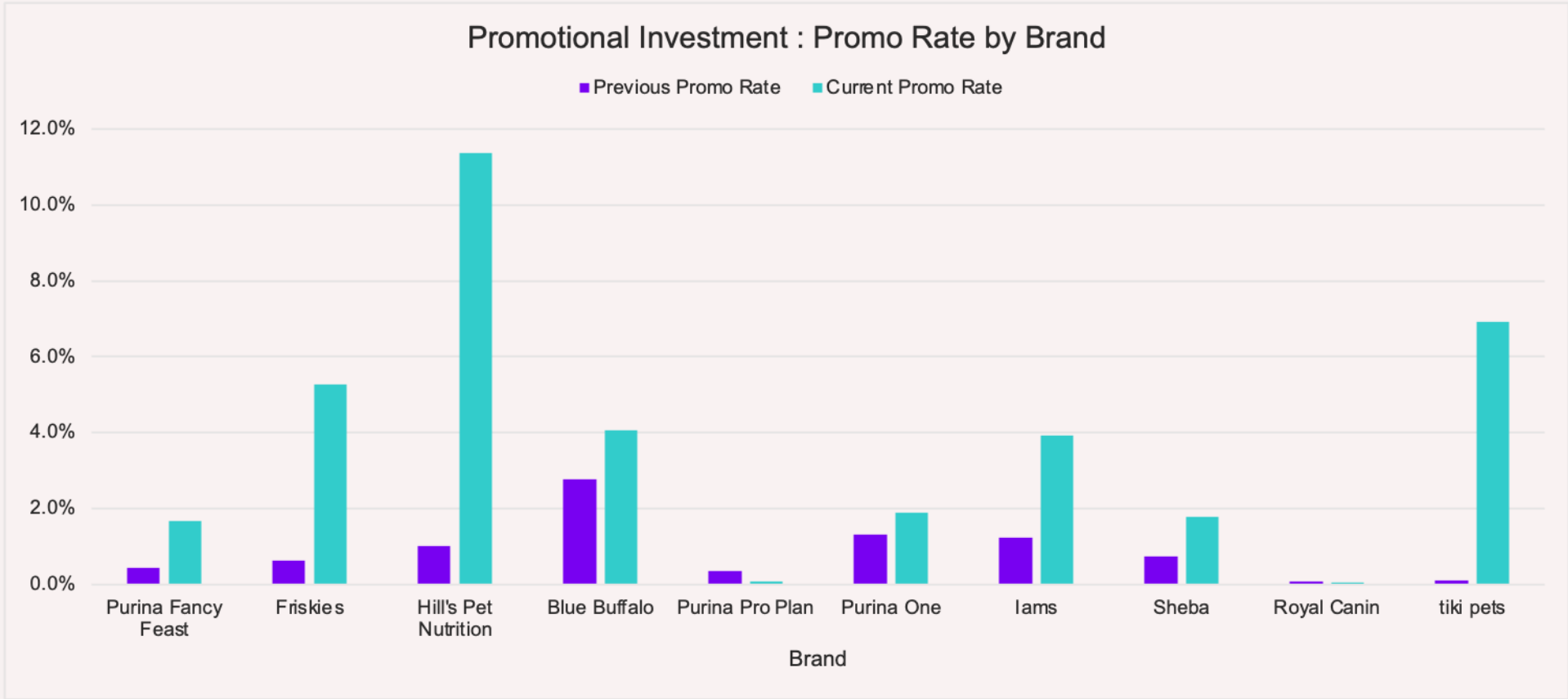
67% of overall units sold are in \$10-19 (35%) and \$20-29 (32%) price bands

Tail price bands (>\$40) contribute 12% of units sold

\$10-19 price band contributes 35% of units, Purina Fancy Feast dominates

# Promotions Benchmarking

Promotion Rate Insights for E-commerce Brands



## Takeaway

Friskies scaled up promotion by 4.6% from 0.6% to 5.3%

Hills Pet Nutrition scaled up promotion by 10.4% from 1% to 11.4%

tiki pets scaled up promotion by 6.8% from 0.1% to 6.9%

Majority of brands are scaling up promotions significantly

Tiki Pets should capitalize on increased promotions to enhance market presence



# Category Deep Dive

Dog Food



# Competitive Benchmarking – Top Brands

Purina Pro Plan gains market share while Blue Buffalo loses ground in Dog Food

			Traffic			Pricing	
Brand	Market share	Sales	Brand Strength	Organic SoV	Sponsored SoV*	ASP	Promo Rate
Hill's Pet Nutrition	14.8% (0.1%)	86.9M (1.8%)	2.5% (-0.2%)	7.1% (-0.8%)	8.5% (-0.2%)	48.1 (-3.1%)	14.0% (13.2%)
Purina Pro Plan	14.3% (1.6%)	83.9M (13.8%)	4.3% (0.1%)	5.7% (-2.6%)	11.3% (1.1%)	53.8 (2.6%)	0.1% (-1.1%)
Blue Buffalo	10.7% (-0.9%)	62.5M (-6.5%)	4.3% (-0.4%)	11.7% (-2.1%)	11.9% (-1.6%)	38.3 (-6.9%)	12.5% (6.3%)
Royal Canin	6.5% (0.5%)	37.8M (9.6%)	7.9% (0.5%)	3.7% (0.3%)	4.2% (0.5%)	52.0 (-3.5%)	0.1% (-0.3%)
Purina One	6.5% (0.5%)	38.3M (9.4%)	1.8% (0.0%)	8.9% (-0.1%)	4.7% (-1.3%)	33.8 (2.3%)	0.4% (-0.1%)
Iams	3.5% (0.2%)	20.6M (6.2%)	2.2% (-0.4%)	3.3% (0.0%)	4.1% (-2.4%)	37.2 (0.7%)	1.0% (0.5%)
Pedigree	3.0% (-0.3%)	17.5M (-9.0%)	2.7% (-0.4%)	7.7% (-1.5%)	1.9% (0.0%)	20.4 (-6.4%)	2.0% (1.5%)

## Takeaway

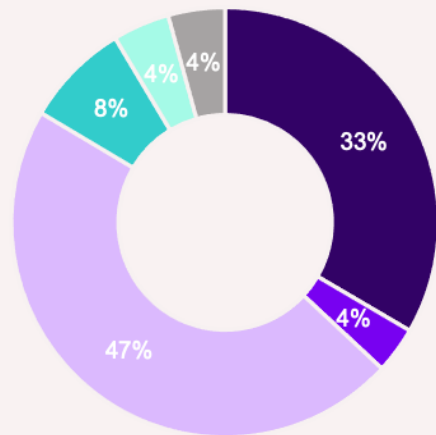
Purina Pro Plan gained market share (from 12.7% to 14.3%) in category Dog Food

Iams scaled down advertising losing 2.4% of its Sponsored SoV

# Traffic Drivers – Search Behavior

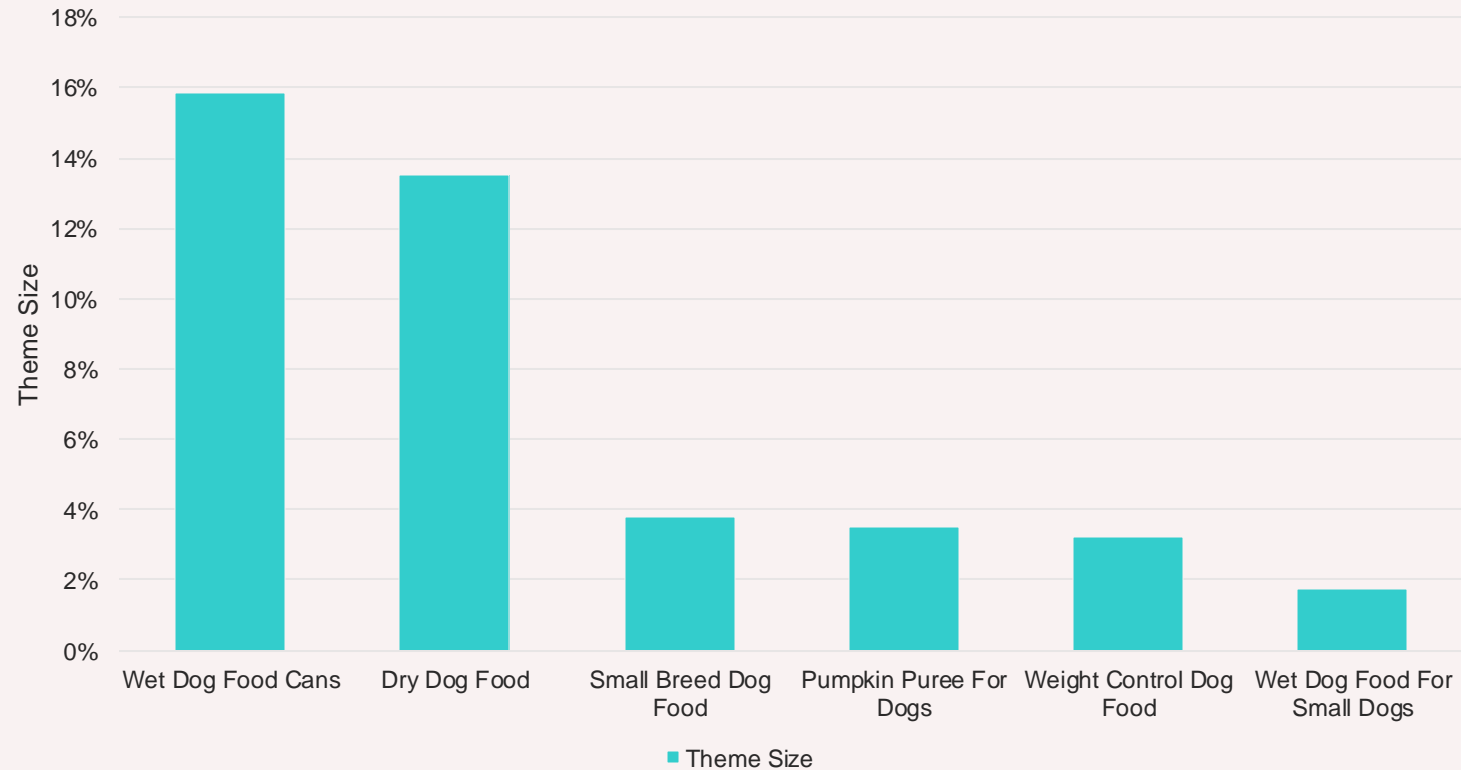
Significant presence in Wet Dog Food Cans, untapped potential with low competition

Amazon: Search Traffic Behavior



■ Others  
■ Cesar  
■ Generic  
■ Royal Canin  
■ Blue Buffalo  
■ Purina Pro Plan

Shopper Search Themes



In Wet Dog Food Cans Blue Buffalo leads with 19.4% share

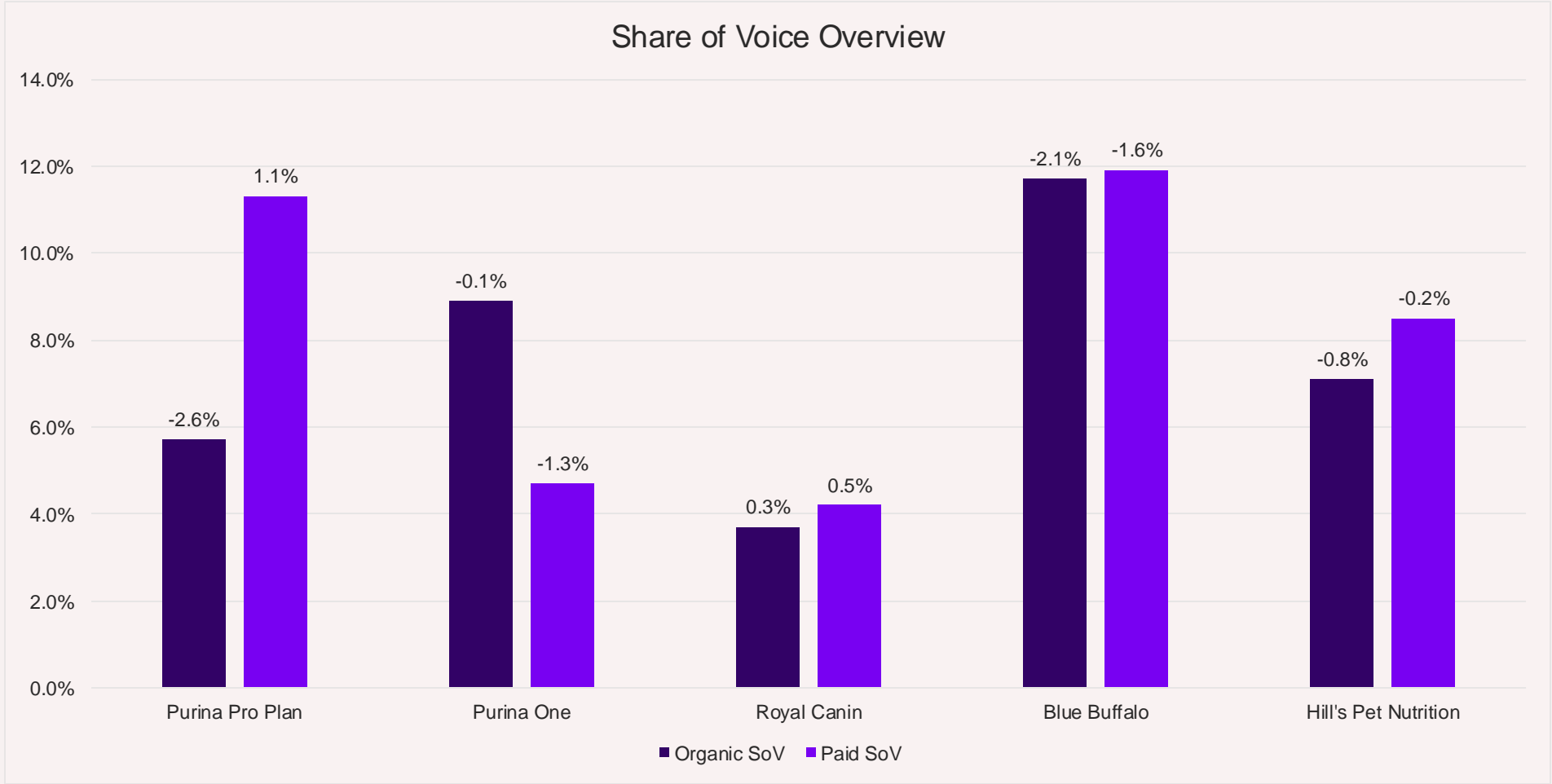
Shoppers searched for dog food based on their dog's size and for options that support weight control

**7 %** of category search is directly for **Royal Canin** products



# Traffic Drivers – Share of Voice

Q3 2024 E-commerce Market Insights for Dog Food Brands



## Takeaway

Purina Pro Plan experienced the highest growth in paid presence, increasing from 11.3% to 22.4% - grew by 11.1%

Blue Buffalo are scaling down advertising



# Takeaway

## What shoppers are buying

Flavor and Care are the top title themes

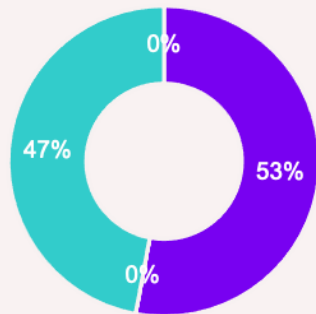


Chicken Rice has the highest theme share at 9.5%

# What shoppers are buying

## Chicken Rice

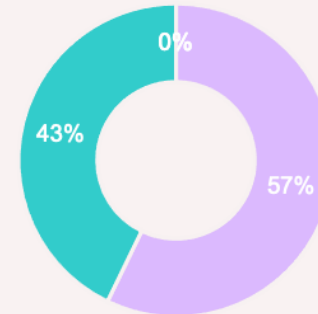
### Top Brand Share



■ Zeyumee ■ Hill's Pet Nutrition ■ The Proper Hound ■ Others

## Sensitive Stomach

### Top Brand Share



■ Zeyumee ■ The Proper Hound ■ Purina Pro Plan ■ Others

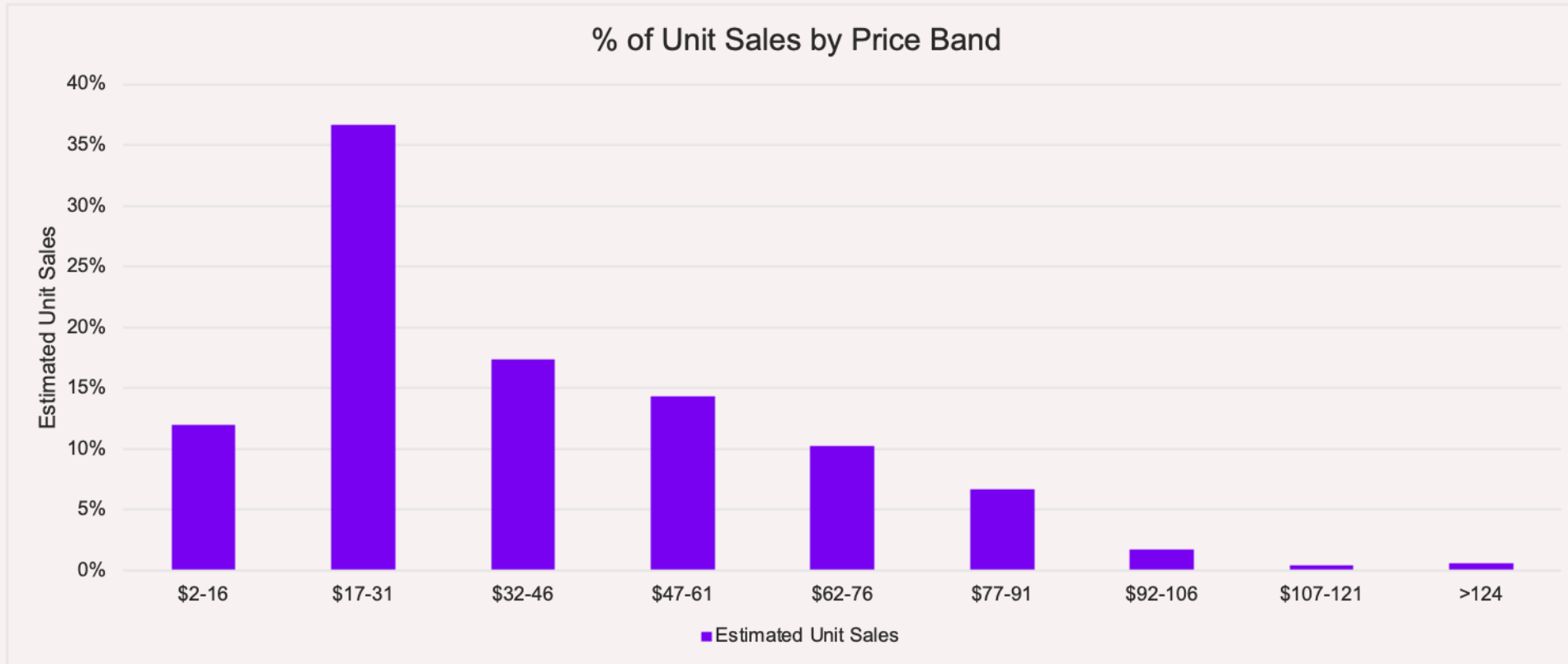
## Takeaway

Chicken Rice: Hills Pet Nutrition leads with 52.94% share; theme highly contested with over 50% share

Sensitive Stomach: Purina Pro Plan leads with 57.17% share; theme highly contested with over 50% share

# Pricing Architecture – Unit Sales by Price Band

## Price Band Analysis



## Takeaway

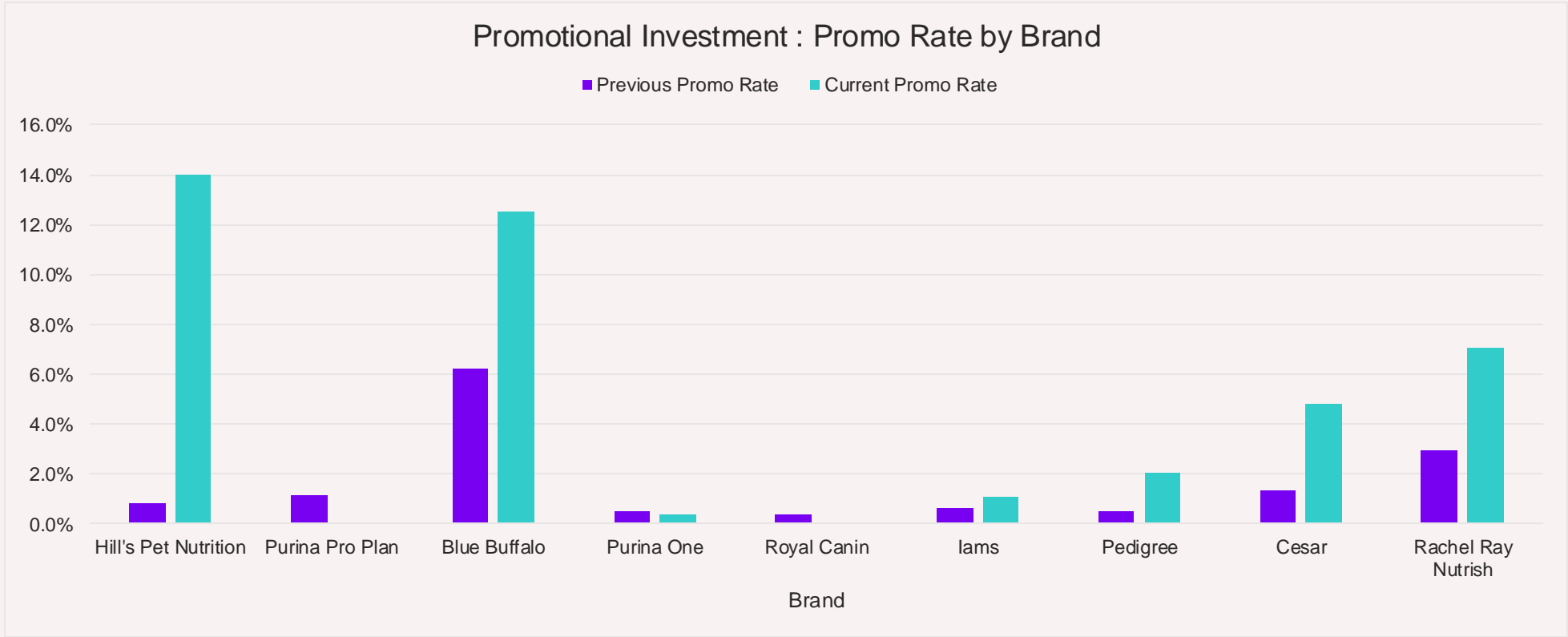
54% of overall units sold are in \$17-31(37%) and \$32-46(17%) price bands

Tail price bands \$107-121, \$92-106, and >\$124 contribute 3% units

\$62-76 price band contributes 20% units and 25% revenue; Purina Pro Plan dominates

# Promotions Benchmarking

Majority of brands are scaling up promotions



## Takeaway

Hills Pet Nutrition scaled up promotion by 13.2% from 0.9% to 14%

Purina Pro Plan scaled down promotion by 1.1% from 1.1% to 0.1%

Blue Buffalo scaled up promotion by 6.3% from 6.2% to 12.5%

# Trending New Product Launches

Amazon Brand gains traction in pet food with significant launches post-April 2024.

ASIN Name	SKU	Brand	Release Date	Price	Revenue	Category Rank
Amazon Brand – Wag Dry Dog Food, Salmon and Brown Rice, 30 lb Bag (Pack of 1)	B0862YK1SS	Wag	2024-05-16	56.1	1.8M	211.0
Amazon Brand – Wag Dry Dog Food, Chicken and Brown Rice, 30 lb Bag	B0862YK1SJ	Wag	2024-05-16	55.8	491.5K	1.3K
Amazon Brand – Wag Dry Dog Food, Beef and Brown Rice, 30 lb Bag (Pack of 1)	B08QF38MCB	Wag	2024-05-16	55.4	459.3K	1.4K



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CommercelQ is helping **Pet Food**  
brands beat the competition?

[Request a demo](#)

