



Packaged
Facts

Durable Dog and Cat Petcare Products, 2nd Edition

SAMPLE

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Market Overview

U.S. Retail Sales Chalk Up Steady Gains

Collars/leashes/harnesses is the second largest category of pet durables, representing XX% of the overall market. The category encompasses a wide range of dog and cat products ranging from utilitarian to jewel-studded, the most commonly used materials being nylon and leather. During 2017, collars, leashes, and harnesses registered U.S. retail sales of just over \$X billion, up from \$XXX million in 2012, reflecting a compound annual growth rate (CAGR) of X.X%, just under that of pet durables overall. Packaged Facts expects collars/leashes/harnesses to continue to advance through 2022, with a forecasted X.X% CAGR bringing sales to \$X.X billion. Since cats are far less likely to sport collars and especially leashes or harnesses, dogs account for an even greater majority of sales than they do in the market overall, at XX%. [Table 4-1]

Table 4-1
U.S. Retail Sales of Dog and Cat Collars, Leashes, and Harnesses: 2012 vs. 2017 vs. 2022
(dollars in millions and CAGR)

2012	2017	2012-2017 CAGR	2022	2017-2022 CAGR
\$XXX	\$X,XXX	X.X%	\$X,XXX	X.X%

CAGR = compound annual growth rate

Source: Packaged Facts

Marketer Overview

Although most of the broad-line marketers of pet products, such as Petmate, Hartz, and Sergeant's, also compete in pet collars/leashes/harnesses, the top marketers in this category have historically been more narrowly focused. Coastal Pet Products, for example, has long been dominant in the pet specialty channel, specializing in collars, leashes, and harnesses. Founded in 1968, Coastal is one of the world's largest pet collar and leash manufacturers, offering over 7,500 SKUs via a 376,500-square-feet production facility. In March 2015, Coastal branched out with its acquisition of Bergan Pet LLC, gaining entry into the toy and feeding/watering categories and expanding its presence in travel products. But the marketer's

focus on collars, leashes, and harnesses is still apparent in the massive number of items it offers in this category. Another pet specialty leader, Lupine, continues to maintain a narrow focus on collars and leashes, with a wide range of products that includes several collections. On the mass-market side, Rose America, which markets toys under the Hyper Pet brand, is also a well-established leader in the collars, leashes, and harnesses category under both the Hyper Pet and PetWear banners.

Dozens of smaller companies also offer pet collars and leashes, in some cases specializing in a specific product type. The Sporn Company is known for its harnesses and halters, while Kurgo's claim to fame is travel themed products. Earthdog specializes in eco-friendly hemp-based products, and offers a range of sustainable collars and leashes, while Cycle Dog got its start creating collars, leashes, and harnesses from upcycled materials, including discarded bike tires.

Along high-tech lines, electronic collars have begun to branch out from barking reduction, containment, and behavior deterrence to include activity monitors, GPS trackers, and RFID units to control "smart" products such as feeders and pet doors. One of the trailblazers in the tech collar field is Radio Systems Corp. with its PetSafe and SportDOG brands. The marketer's initial offerings included stand-alone and remote control bark collars as well as the Innotek line of in-ground fencing, but it has since added a line of "smart" products, including a pet feeder with iPhone and Android connectivity and an RFID Smart Door. At the same time, a host of new start-ups have entered the wearable tech field in the past decade, with the majority focused on products that enable pet tracking, activity monitoring, and other connected behaviors, allowing owner interaction via iOS or Android app. Some of the more recent entrants include Findster with its wearable GPS pendant; FitBark, with its new on-collar FitBark 2, which is a more durable version of its original activity tracker; and the American Kennel Club with LINK, a collar with a built-in tracker that also keeps track of a pet's vital signs.

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