



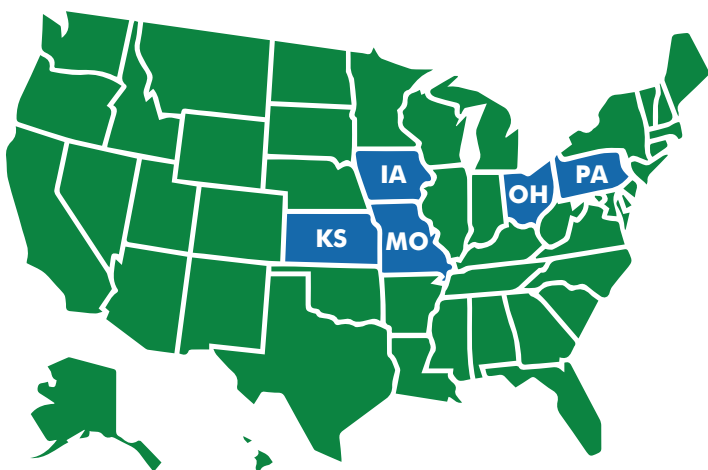
The Pet Food Manufacturing Industry Feeds America's Pets, Rural Economies

America's 135 million cats and dogs all need food¹. From kibble to canned food and treats, pets consume over 9.8 million tons of pet food, valued at \$30.3 billion, annually. Keeping them nourished with high-quality, nutritionally balanced and safe pet food are the more than 500 pet food manufacturing facilities across the United States.

But these facilities do more than help feed America's pets. U.S. pet food manufacturers also contribute to the national and rural economies through the purchase of over 8 million tons of farm-grown crops and livestock and poultry products. A recent report commissioned by the Institute for Feed Education and Research, North American Renderers Association and Pet Food Institute found that pet food manufacturers purchase \$6.9 billion in products from farmers and ranchers. In turn, farmers and ranchers purchase roughly \$5.3 billion in materials and services from farm suppliers, who in turn purchase roughly \$4.1 billion in inputs from other industries.

The demand for pet food is strong. The U.S. pet food industry will continue to thrive as it develops new, innovative solutions to meet the nutritional needs of pets and changing demands of consumers - all while reducing its environmental impact.

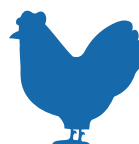
STATES REAPING BIGGEST ECONOMIC BENEFITS



THE U.S. BY THE NUMBERS:



Number of Facilities
519



Ingredient Purchases
8.7 million tons



Ingredient Farm Purchases
\$6.9 billion



Farm Input Purchases
\$5.3 billion



Supplier Input Purchases
\$4.1 billion

NUMBER OF FACILITIES: Data from the Food and Drug Administration's list of registered pet food manufacturing facilities; **INGREDIENT PURCHASES:** Labels of sold pet food were analyzed to estimate amounts of each ingredient; **INGREDIENT FARM PURCHASES:** dollar value of ingredients sold by farm and farm-product processors; **FARM INPUT PURCHASES:** farmers buy inputs and services (e.g., seed, fertilizer, fuel, labor and machinery); **SUPPLIER INPUT PURCHASES:** suppliers to farmers buy products and services (e.g., as fuel, equipment, labor).

¹American Veterinary Medical Association. "2017-2018 U.S. Pet Ownership & Demographics Sourcebook." avma.org

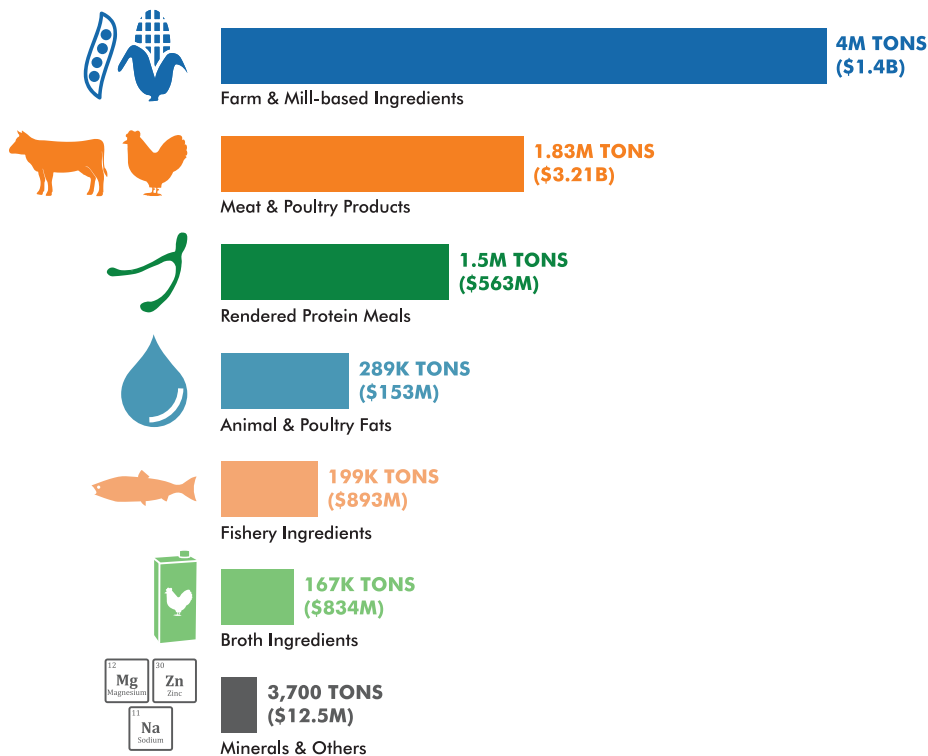
Decision Innovation Solutions prepared the data for this study. For more information visit ifeeder.org, nara.org or petfoodinstitute.org.





The Demand for Pet Food Is Strong

INGREDIENTS USED IN PET FOOD



What ingredients are most commonly used in pet food? Although the answer is relatively simple, the way of determining it is a bit complex, given pet food formulations vary by many factors, including an ingredient's nutrient profile, shopper preference and price point.

In 2018, approximately 9.8 billion tons of pet food were sold at a value of \$30.3 billion. Farm and mill-based ingredients (i.e., ingredients from grains and oilseeds, dairy products, egg products, fruits, nuts, root crops, sweeteners, tree oils and vegetables) represent the largest volume of products used in pet food at 4 million tons, followed by meat and poultry products at 1.83 million tons and rendered protein meals at 1.5 million tons.

CAT FOOD

Top Animal Proteins	
Chicken By-product Meal	161K tons
Chicken	114K tons
Poultry By-product Meal	103K tons
Top Animal Fats	
Animal Fat	25K tons
Beef Fat	24K tons
Chicken Fat	6K tons
Top Plant-Based Products	
Corn	292K tons
Corn Gluten Meal	241K tons
Soybean Meal	82K tons

DOG FOOD

Top Animal Proteins	
Meat and Bone Meal	501K tons
Chicken	470K tons
Chicken By-product Meal	202K tons
Top Animal Fats	
Beef Fat	124K tons
Animal Fat	80K tons
Chicken Fat	42K tons
Top Plant-Based Products	
Corn	992K tons
Soybean Meal	345K tons
Corn Gluten Meal	235K tons



Total Tons of Pet Food Sold:
9.8 billion tons



Total Tons of Cat Food Ingredients Used:
2.1 million tons



Total Tons of Dog Food Ingredients Used:
5.9 million tons

TOTAL AMOUNT OF PET FOOD: Data from Nielsen sales data factored up by 1.4548 to reflect national numbers based on national sales; **TOTAL AMOUNT OF CAT and DOG FOOD:** Total amount of ingredients in cat and dog food, not including key additives, sold at retail, allocated by number of cats and dogs per state.

