

SAMPLE

U.S.: Pet Food Market. Analysis And Forecast to 2020

2015 Edition



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B 1. INTRODUCTION

1.1 REPORT DESCRIPTION

The report provides an in-depth analysis of the U.S. pet food market. It presents the latest data of the market size and volume, domestic production, exports and imports, price dynamics and turnover in the industry. In addition, the report contains insightful information about the industry, including industry life cycle, business locations, productivity, employment and many other crucial aspects. The Company Profiles section contains relevant data on the major players in the industry.

Data coverage:

- Market size;
- Domestic production, value of shipments;
- Key market players and their profiles;
- Exports, imports and trade balance;
- Import and export prices;
- Forecast of the market dynamics in the medium term;
- Key industry statistics;
- Life cycle of the industry;
- Number of establishments and their locations;
- Employment data;
- Industry productivity.

Product coverage:

- Dog food
- Cat food
- Dog and cat food, nsk

1.2 REPORT STRUCTURE

This report consists of 8 sections, further subdivided into chapters. The first section serves as an introductory part of the report, providing a description of the research involved and the methodology behind it.

The aim of the "Executive summary" section is to provide a succinct review of the market. The chapters "Key Findings" and "Market Trends" briefly outline the main market tendencies, enabling the reader to see the whole picture of current market dynamics.

The third section, "Market Overview", provides data concerning market value and trade balance, market opportunities, as well as a market forecast to 2020.

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Domestic production is analyzed in the 4th section, containing data on production from 2008 to 2013, by types and by states.

Sections 5 and 6 deal with imports and exports, containing information about imports/exports by countries, as well as relevant data on prices.

The industry is analyzed in more detail in the “Competitive landscape” section that embraces a number of aspects, such as industry life cycle, business locations, employment statistics, information about annual wages in the industry, productivity and establishment size and legal form. This section provides a deeper understanding of the industry and the data presented is a useful tool for business planning.

The 8th section, “Company profiles”, contains a list of the main market players, along with brief presentations of their activities and history. Contact information of these companies is also included.

1.3 RESEARCH METHODOLOGY

This report on the *U.S. Pet Food Market. Analysis And Forecast to 2020* presents a variety of tables and figures on a wide range of industry-related topics. The most recent data is presented where possible, the latest reference year (for some data sets) being 2013.

Main data sources:

1. U.S. Census Bureau <http://census.gov>
2. The UN Comtrade Database <http://comtrade.un.org/>
3. Wikipedia <http://www.wikipedia.org/>
4. Websites of the key dog and cat food manufacturers

Domestic production

The U.S. Census Bureau collects annual information about establishments. Value of production shipments are primarily based on information obtained from manufacturing companies with \$500 million or more in annual shipments. In order to strengthen the sample coverage in individual industry categories, the U.S. Census Bureau includes selected smaller companies. The sources from which companies are identified for inclusion in the survey panel are the quinquennial economic censuses (manufacturing sector) and the Annual Survey of Manufactures (ASM). For firms that operate in a single industry category, the reporting unit typically comprises all operations of the company. Most large, diversified companies, however, file separate reports for divisions with significant activity in different industrial areas.

B**Imports and Exports**

The UN Comtrade is used for trade data and is based on the 6-digit Harmonised System (HS). HS was developed by the World Customs Organization (WCO). The system covers approximately 5,000 commodity groups, each identified by a six-digit code. More than 179 countries and economies use this system. The UN Comtrade database contains more than 3.1 billion trade records starting from 1962.

Consumption and Market Value

In this report, apparent consumption is calculated as Consumption = Production (Value of Shipments) + Imports – Exports. Variations in inventory are not taken into account.

The information in this report is as detailed as possible. However, in some cases, qualitative data is not available on a product or a sub-sector level. In these cases information on the sector level is provided.

Competitive landscape

The industry snapshots present key statistics from three Census Bureau economic programs, as well as per capita ratios using data from Population Estimates. Historical data are not shown when they are not comparable due to NAICS changes. For more information, see Definitions and Comparability in the Industry Statistics Portal and the Snapshot FAQs.

The 2012 Economic Census was released on a flow basis so some data may not yet be available, and data for some industries are only available for the U.S. and by State. For more information, see the release schedule and the Geographic Coverage Tables.

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2. EXECUTIVE SUMMARY

2.1 KEY FINDINGS

Table 1: Key Findings

U.S. Pet Food Market In 2013

Market Value	million USD	
	% to 2012	%
Production	million USD	
	% to 2012	%
Imports	thousand tonnes	
	% to 2012	%
	thousand USD	
	% to 2012	%
Exports	thousand tonnes	
	% to 2012	%
	thousand USD	
	% to 2012	%

2.2 MARKET TRENDS

...

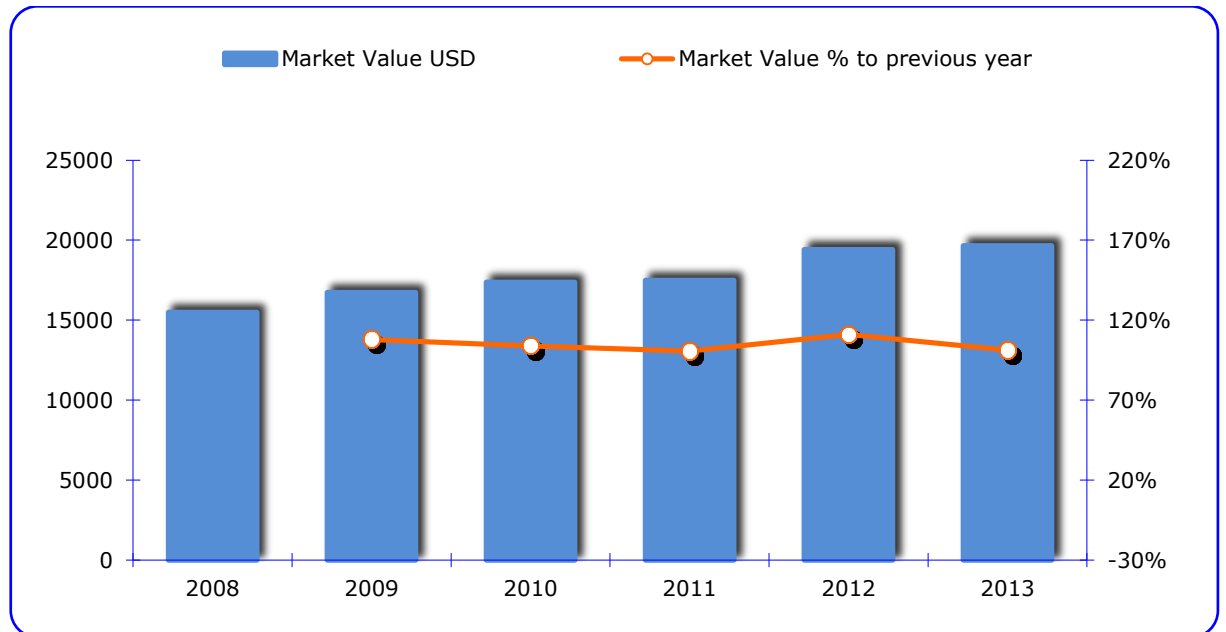
3. MARKET OVERVIEW

3.1 MARKET VALUE

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Figure 1: Pet Food Market Value, 2008-2013
(million USD, % to previous year)



Source: *****

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Table 2: Pet Food Market Value, 2008-2013
(million USD), in producers and import/export prices

Product	Unit	2008	2009	2010	2011	2012	2013	CAGR 2008-2013
Domestic production	USD							%
	% to previous year	-	%	%	%	%	%	-
Imports	USD							%
	% to previous year	-	%	%	%	%	%	-
Exports	USD							%
	% to previous year	-	%	%	%	%	%	-
Market Value (Apparent Consumption)	USD							%
	% to previous year	-	%	%	%	%	%	-

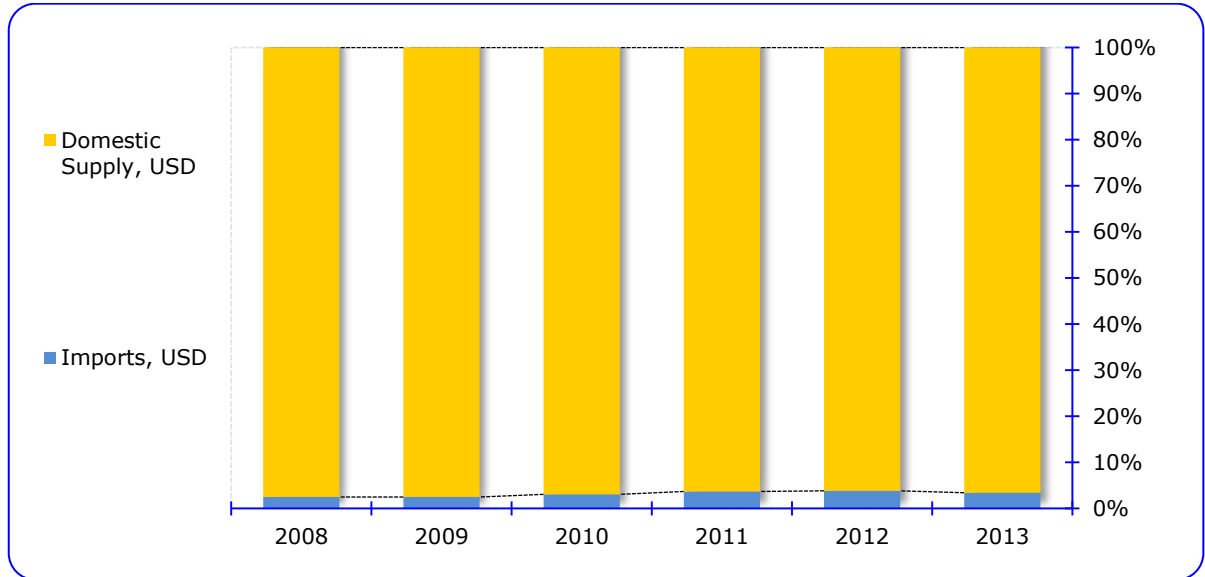
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3.2 TRADE BALANCE

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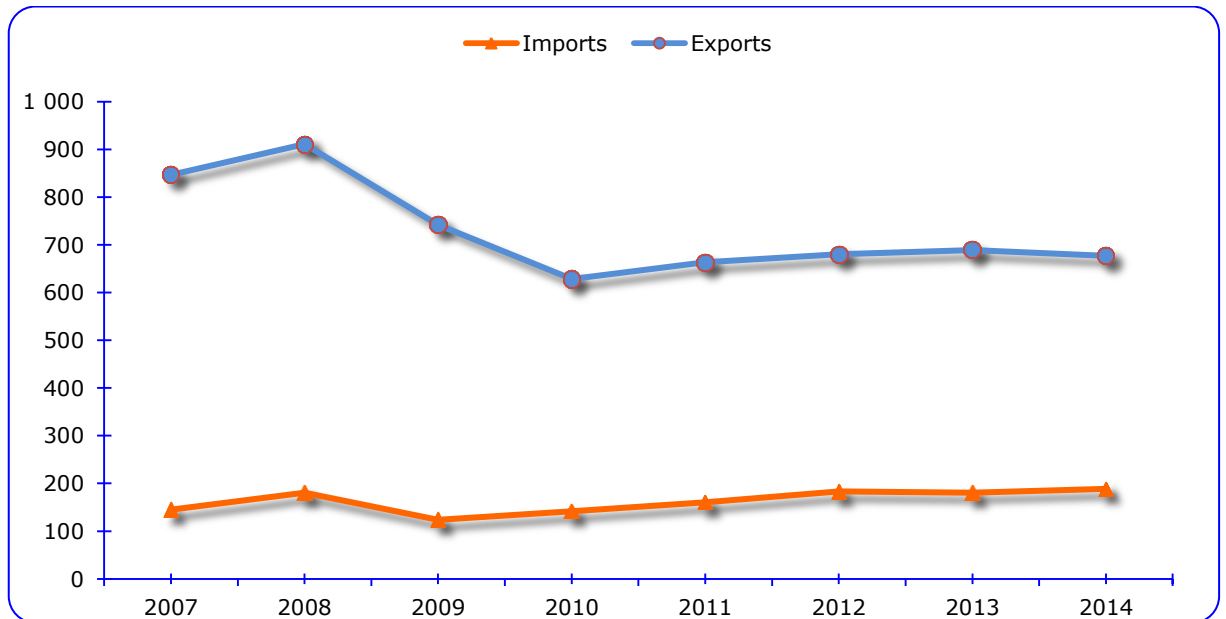
Figure 2: Pet Food Market Structure – Domestic Supply Vs. Imports, In Value Terms, 2008-2013
(% based on USD), in exporter/importer prices



Source: *****

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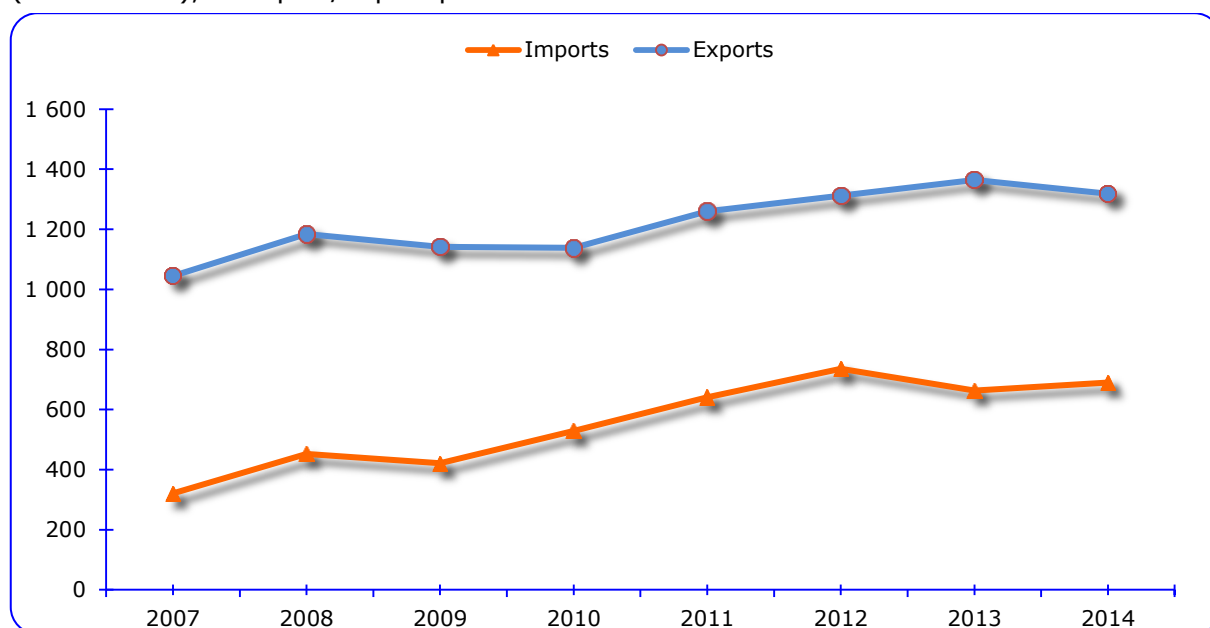
Figure 3: Trade Balance, Pet Food, In Physical Terms, 2007-2014
(thousand tonnes)



Source: *****

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Figure 4: Trade Balance, Pet Food, In Value Terms, 2007-2014 (million USD), in import/export prices



Source: *****

3.3 MARKET OPPORTUNITIES

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Table 3: Market Opportunities, 2008-2013

Item	Unit	2008	2009	2010	2011	2012	2013	CAGR 2008-2013
Market Value	million USD							%
Imports	million USD							%
Share of imports in demand	%	%	%	%	%	%	%	-
Import price	USD per tonne							%

Source: *****

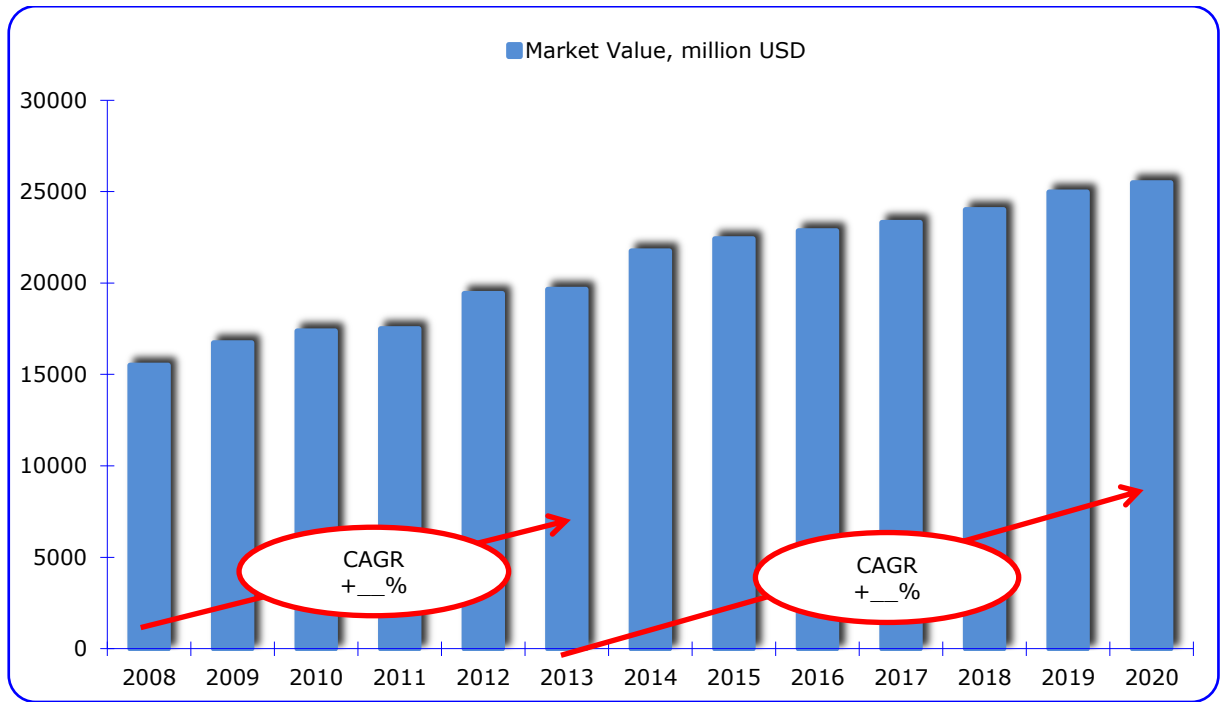
3.4 MARKET FORECAST TO 2020

Driven by current economic growth in the U.S., high consumer confidence index, and consumers turning to nutrient-enriched food for their pets, the animal food sector as a whole is expected to continue a modest upward consumption trend over the next six years.

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Figure 5: Market Forecast To 2020
(million USD)



Source: *****

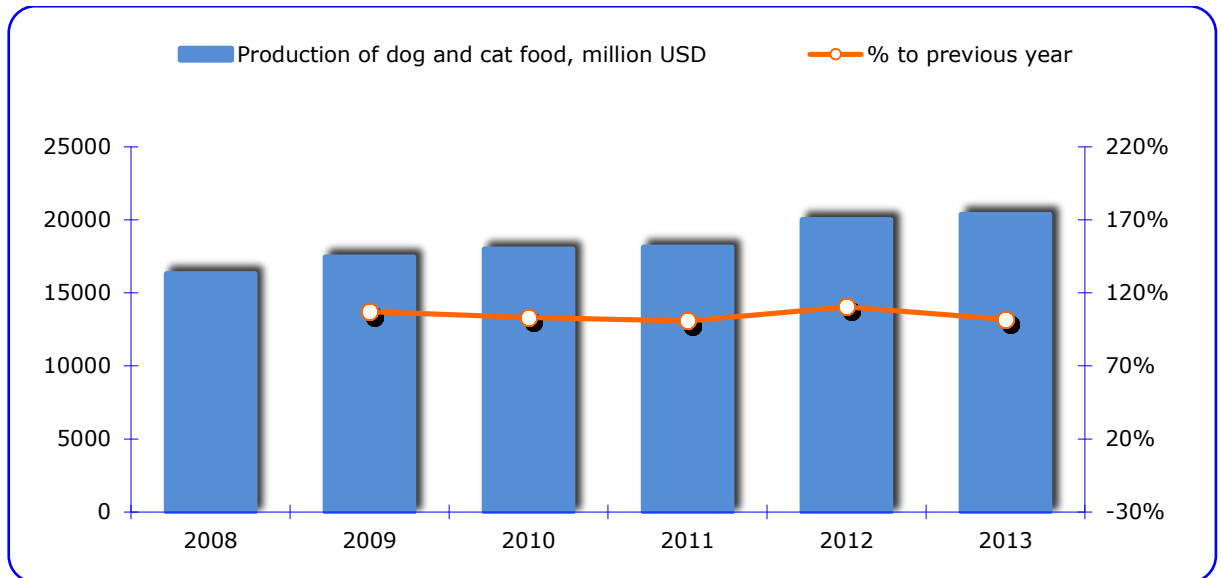
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4. DOMESTIC PRODUCTION

4.1 PRODUCTION IN 2007-2013

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Figure 6: Production Of Pet Food, Shipments, In Value Terms, 2008–2013 (million USD)



Source: *****

4.2 PRODUCTION BY TYPES

Pet food production is divided into the following types: dog food, cat food and other food.

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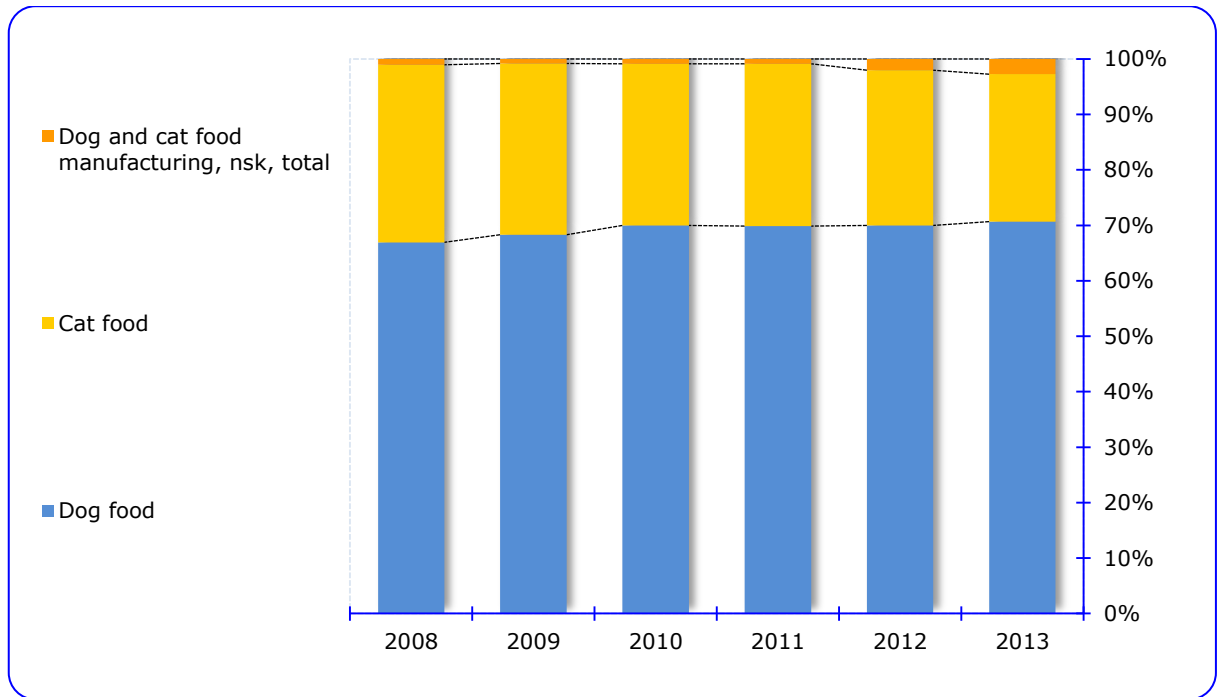
Table 4: Production Of Pet Food, In Value Terms, By Type, 2008-2013 (million USD)

Type	2008	2009	2010	2011	2012	2013	CAGR, 2008-2013
Dog food							%
Cat food							%
Dog and cat food manufacturing, nsk, total							%
Total							

Source: *****

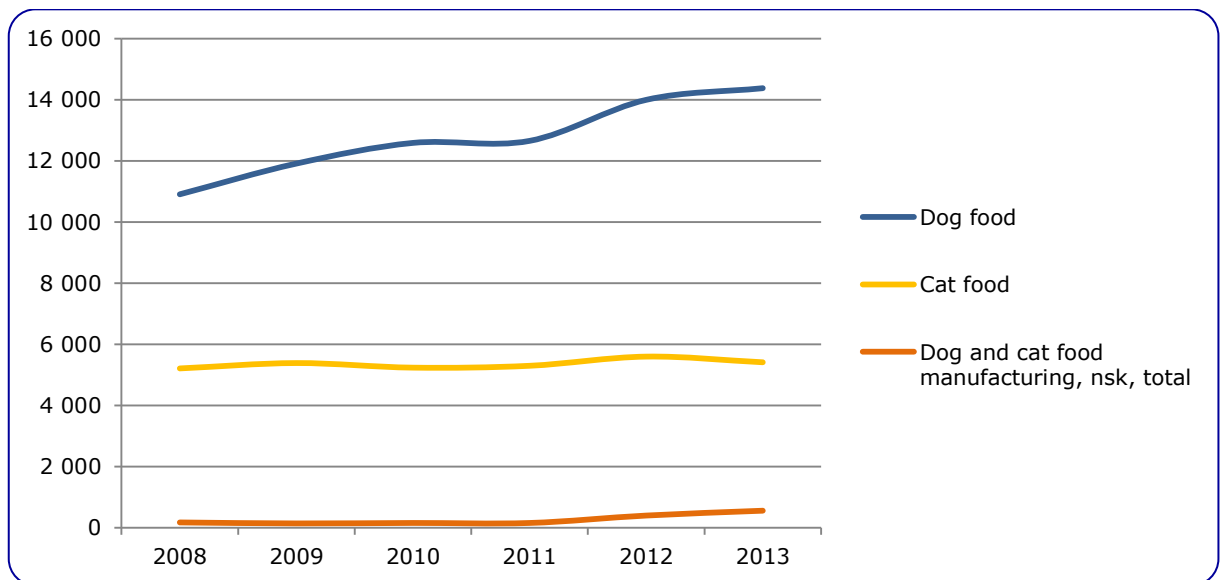
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Figure 7: Production Of Pet Food, By Type, 2008-2013
(%, based on USD)



Source: *****

Figure 8: Production Of Pet Food, By Type, In Value Terms, 2008–2013
(million USD)



Source: *****

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4.3 PRODUCTION BY STATES

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Table 5: Pet Food Production, By State, 2012
(million USD)

State	Value of Shipments(Mil \$)
Alabama	
Alaska	
Arizona	
Arkansas	
California	
Colorado	
Connecticut	
Delaware	
District of Columbia	
Florida	
Georgia	
Hawaii	
Idaho	
Illinois	
Indiana	
Iowa	
Kansas	
Kentucky	
Louisiana	
Maine	
Maryland	
Massachusetts	
Michigan	
Minnesota	
Mississippi	
Missouri	
Montana	
Nebraska	
Nevada	
New Hampshire	
New Jersey	
New Mexico	
New York	
North Carolina	
North Dakota	
Ohio	
Oklahoma	
Oregon	
Pennsylvania	
Rhode Island	
South Carolina	
South Dakota	

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State	Value of Shipments(Mil \$)
Tennessee	
Texas	
Utah	
Vermont	
Virginia	
Washington	
West Virginia	
Wisconsin	
Wyoming	

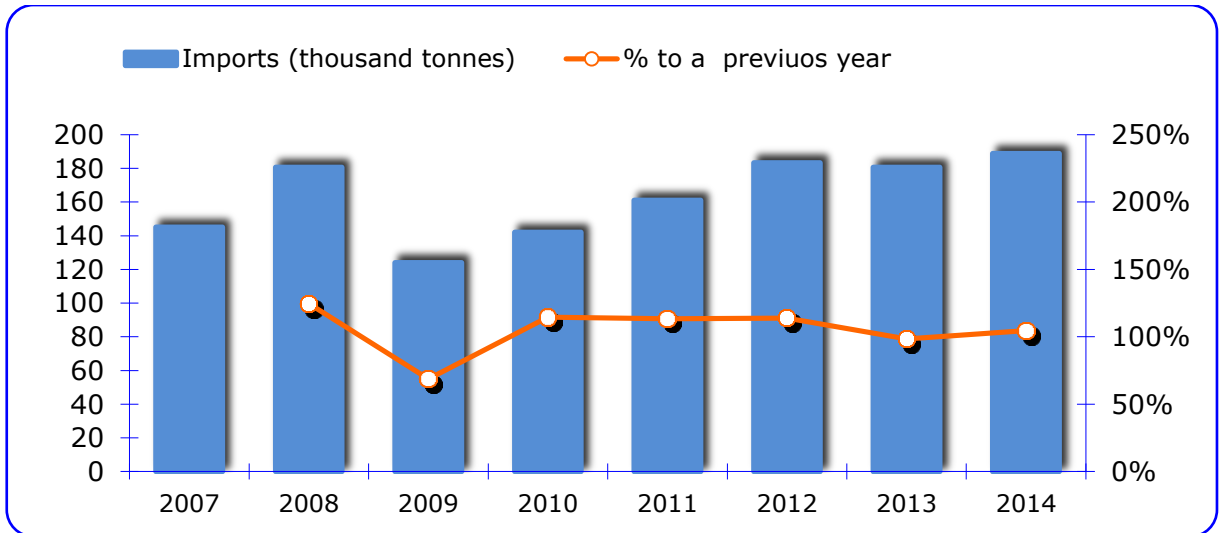
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B 5. IMPORTS

5.1 IMPORTS IN 2007-2014

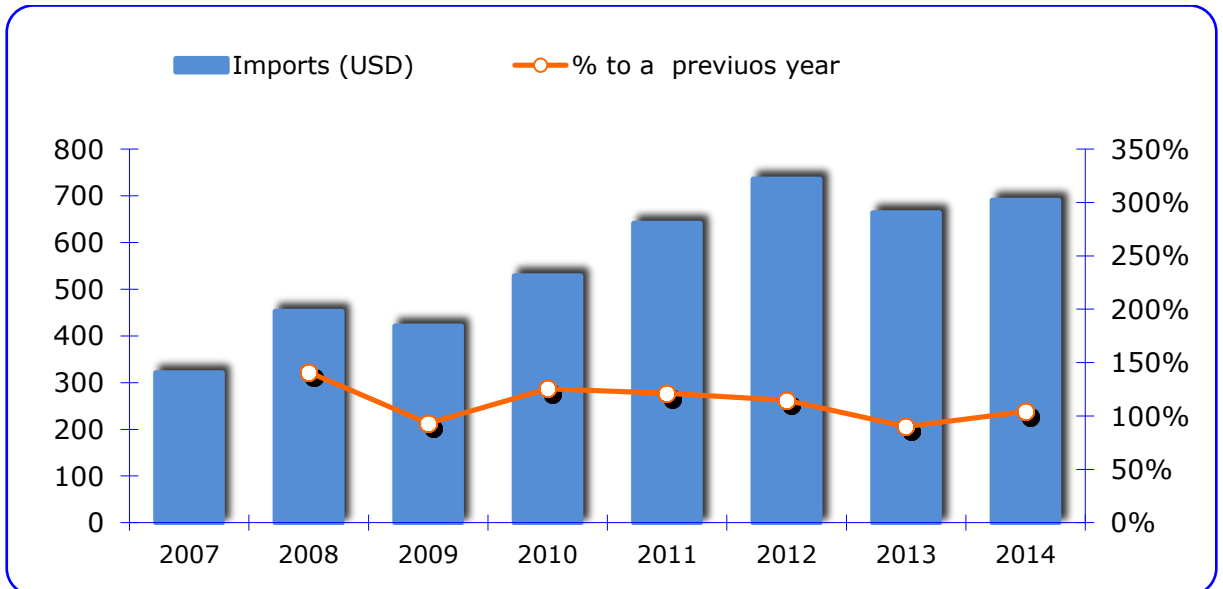
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Figure 9: Imports Of Pet Food, In Physical Terms, 2007-2014
(thousand tonnes)



Source: *****

Figure 10: Imports Of Pet Food, In Value Terms, 2007-2014
(million USD)



Source: *****

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5.2 IMPORTS BY COUNTRIES

. . .

For more information on pet food imports by countries, see Appendix 1.

Table 6: Imports Of Pet Food, In Physical Terms, By Country, 2007-2014
(thousand tonnes)

COUNTRY/PERIOD	Units	2007	2008	2009	2010	2011	2012	2013	2014	CAGR 2007- 2014
Canada	tonnes									%
Thailand	tonnes									%
China	tonnes									%
Australia	tonnes									%
Costa Rica	tonnes									%
Mexico	tonnes									%
Uruguay	tonnes									%
Ireland	tonnes									%
Cambodia	tonnes									-
Netherlands	tonnes									%
Others	tonnes									%
Total	tonnes									%

Source: *****

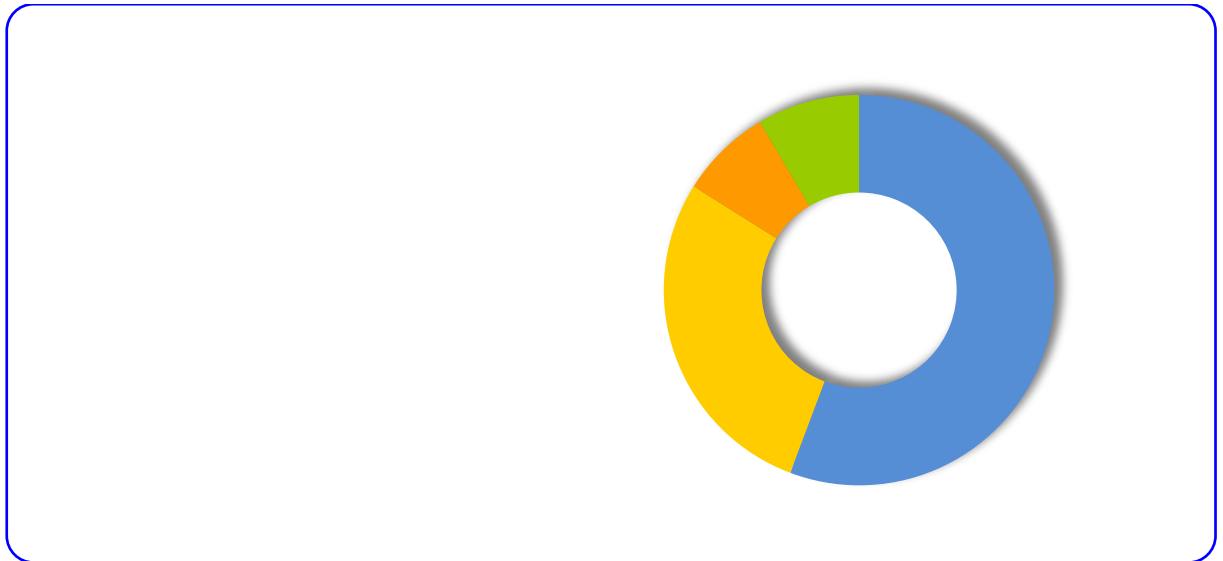
Table 7: Imports Of Pet Food, In Value Terms, By Country, 2007-2014
(million USD)

COUNTRY/PERIOD	Units	2007	2008	2009	2010	2011	2012	2013	2014	CAGR 2007- 2014
Canada	USD									%
Thailand	USD									%
China	USD									%
Cambodia	USD									-
Australia	USD									%
Netherlands	USD									%
Ireland	USD									%
Uruguay	USD									%
Costa Rica	USD									%
Mexico	USD									%
Others	USD									%
Total	USD									%

Source: *****

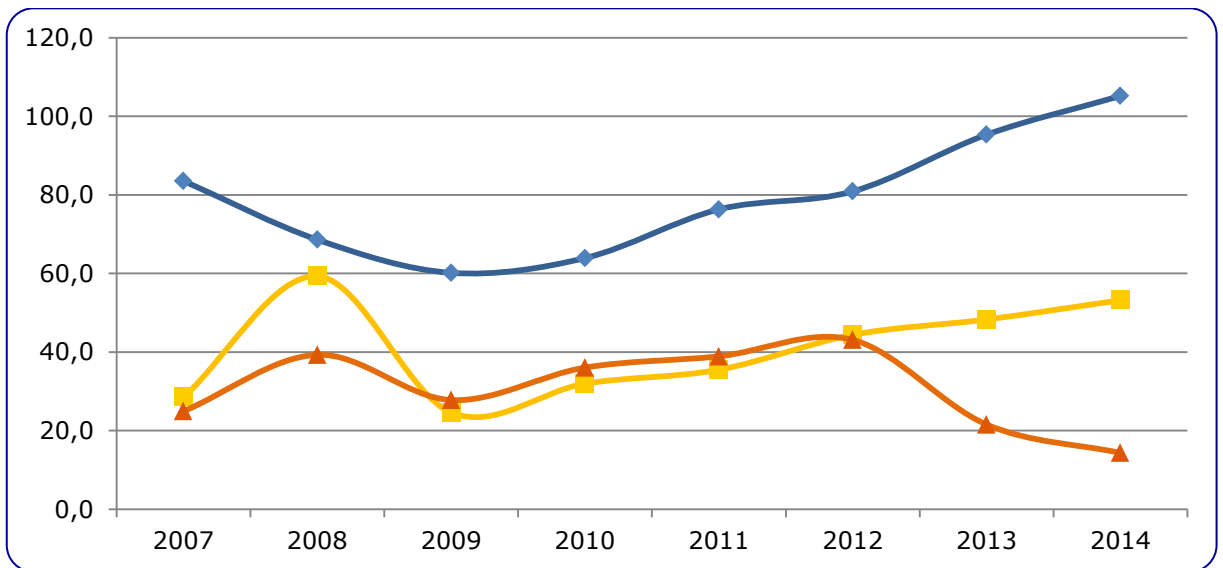
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Figure 11: Imports Of Pet Food, By Country Of Origin, 2014
(%, based on tonnes)



Source: *****

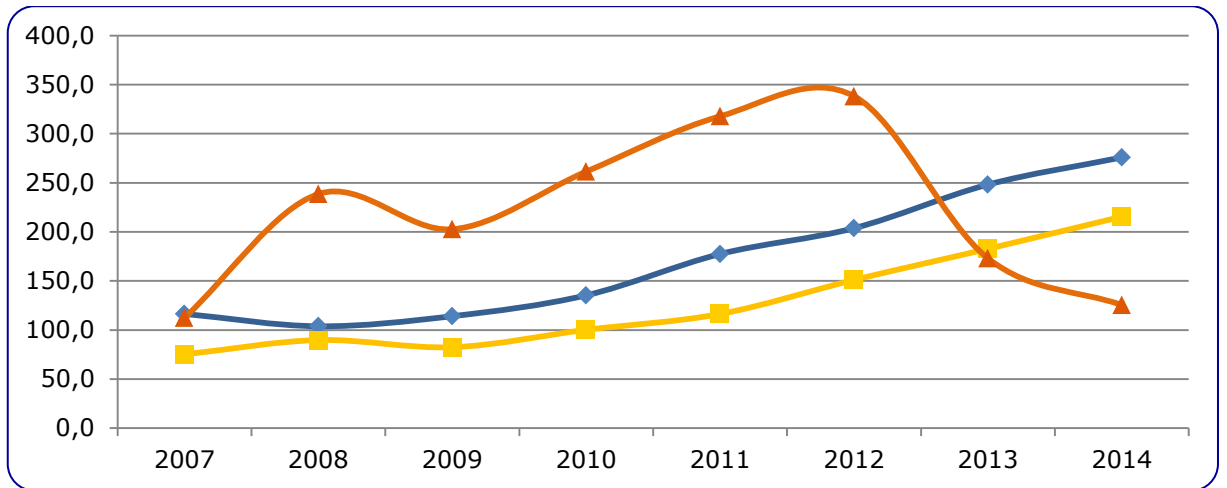
Figure 12: Imports Of Pet Food, In Physical Terms, By Country Of Origin, 2007–2014
(thousand tonnes)



Source: *****

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Figure 13: Imports Of Pet Food, In Value Terms, By Country Of Origin, 2007–2014 (million USD)



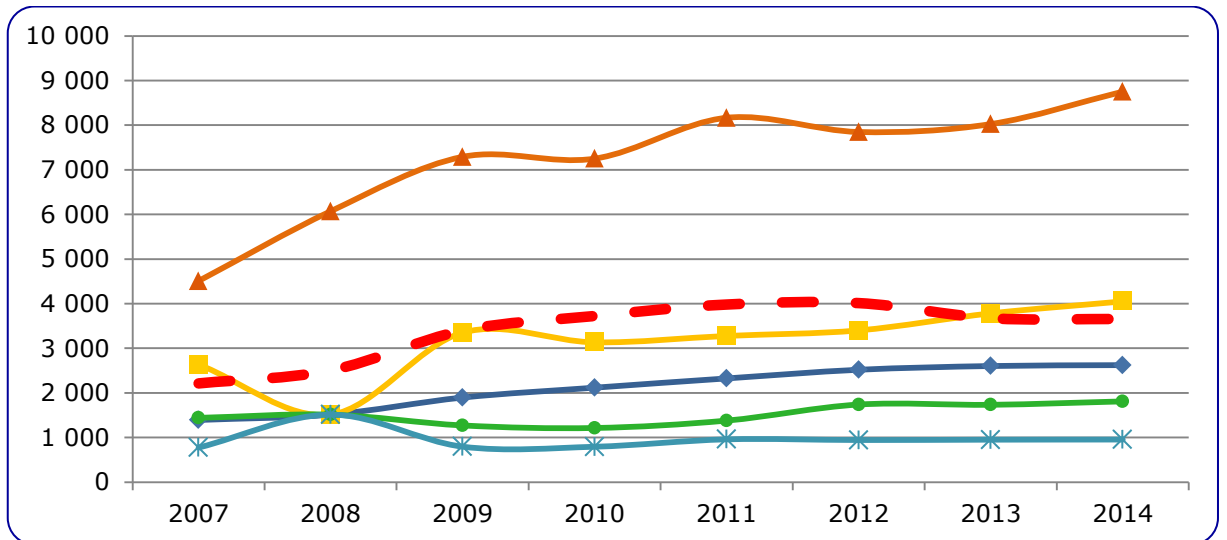
Source: *****

5.3 IMPORT PRICES BY COUNTRIES

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For more information on import prices for pet food by countries, see Appendix 1.

Figure 14: Import Prices Of Pet Food, By Country of Origin, 2007-2014 (USD per tonne)



Source: *****

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Table 8: Import Prices Of Pet Food, By Type and Country Of Destination, 2014
(USD per tonne)

Country	2007 USD/ tonne	2008 USD/ tonne	2009 USD/ tonne	2010 USD/ tonne	2011 USD/ tonne	2012 USD/ tonne	2013 USD/ tonne	2014 USD/ tonne
230910 - Dog or cat food (retail)								
Canada								
Thailand								
China								
Australia								
Costa Rica								
Mexico								
Uruguay								
Ireland								
Average								

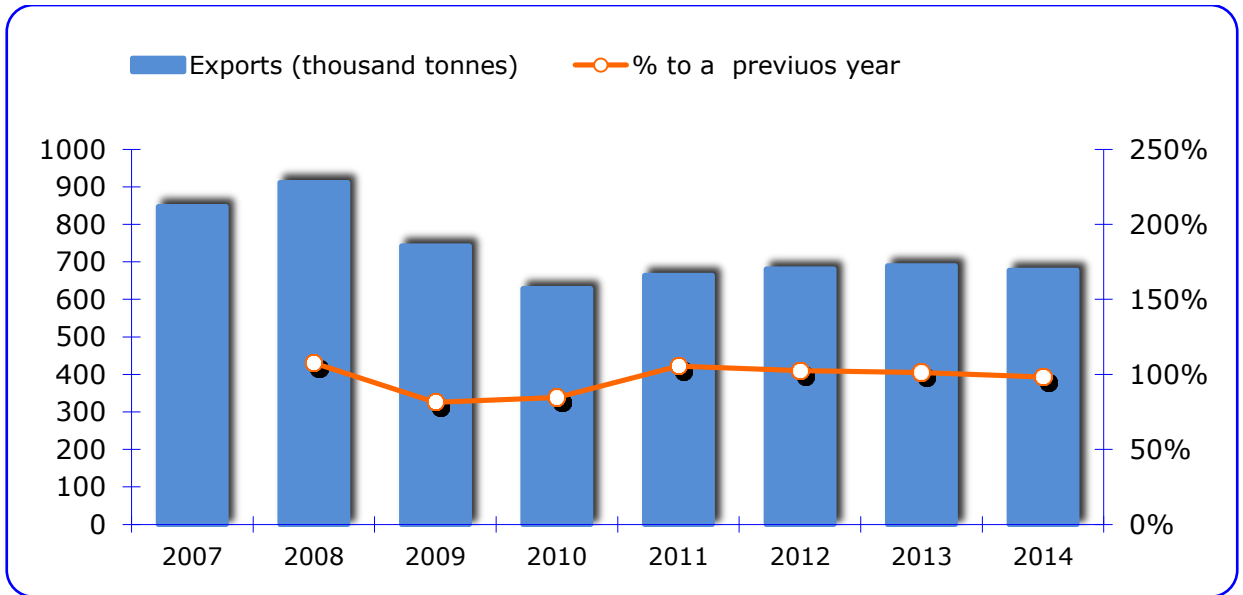
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B 6. EXPORTS

6.1 EXPORTS IN 2007-2014

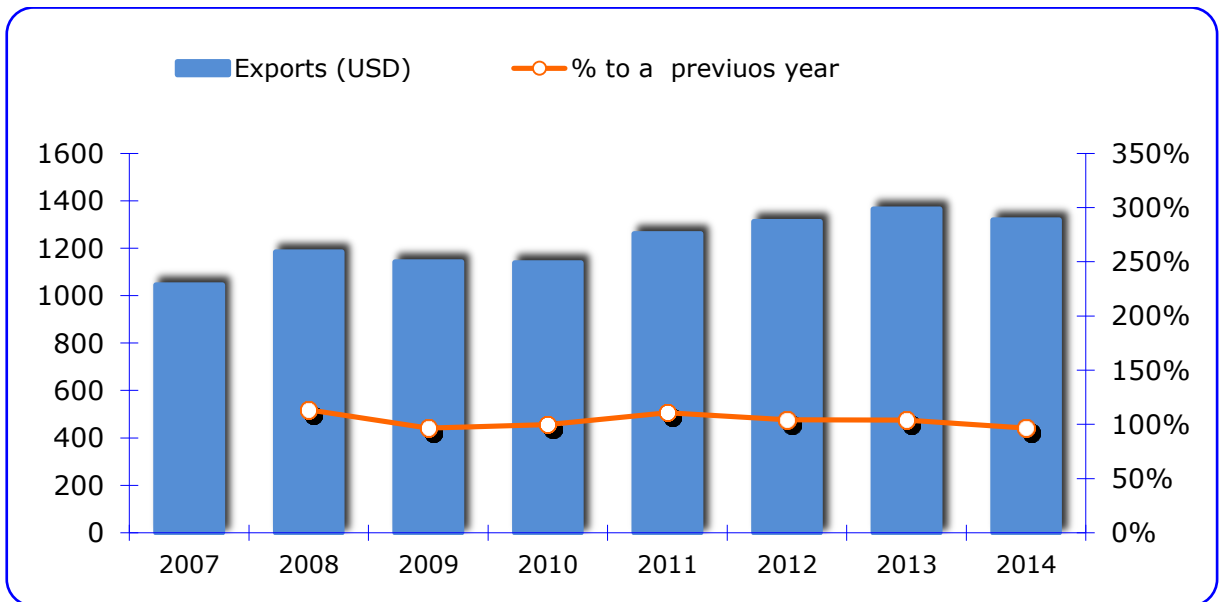
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Figure 15: Exports Of Pet Food, In Physical Terms, 2007-2014 (thousand tonnes)



Source: *****

Figure 16: Exports Of Pet Food, In Value Terms, 2007-2014 (million USD)



Source: *****

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6.2 EXPORTS BY COUNTRIES

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For more information on pet food exports by countries, see Appendix 1.

Table 9: Exports Of Pet Food, In Physical Terms, By Country Of Destination, 2007-2014 (thousand tonnes)

COUNTRY/PERIOD	Units	2007	2008	2009	2010	2011	2012	2013	2014	CAGR 2007-2014
Canada	tonnes									%
Japan	tonnes									%
Mexico	tonnes									%
Australia	tonnes									%
Philippines	tonnes									%
New Zealand	tonnes									%
Rep. of Korea	tonnes									%
Hong Kong	tonnes									%
Costa Rica	tonnes									%
Others	tonnes									%
Total	tonnes									%

Source: *****

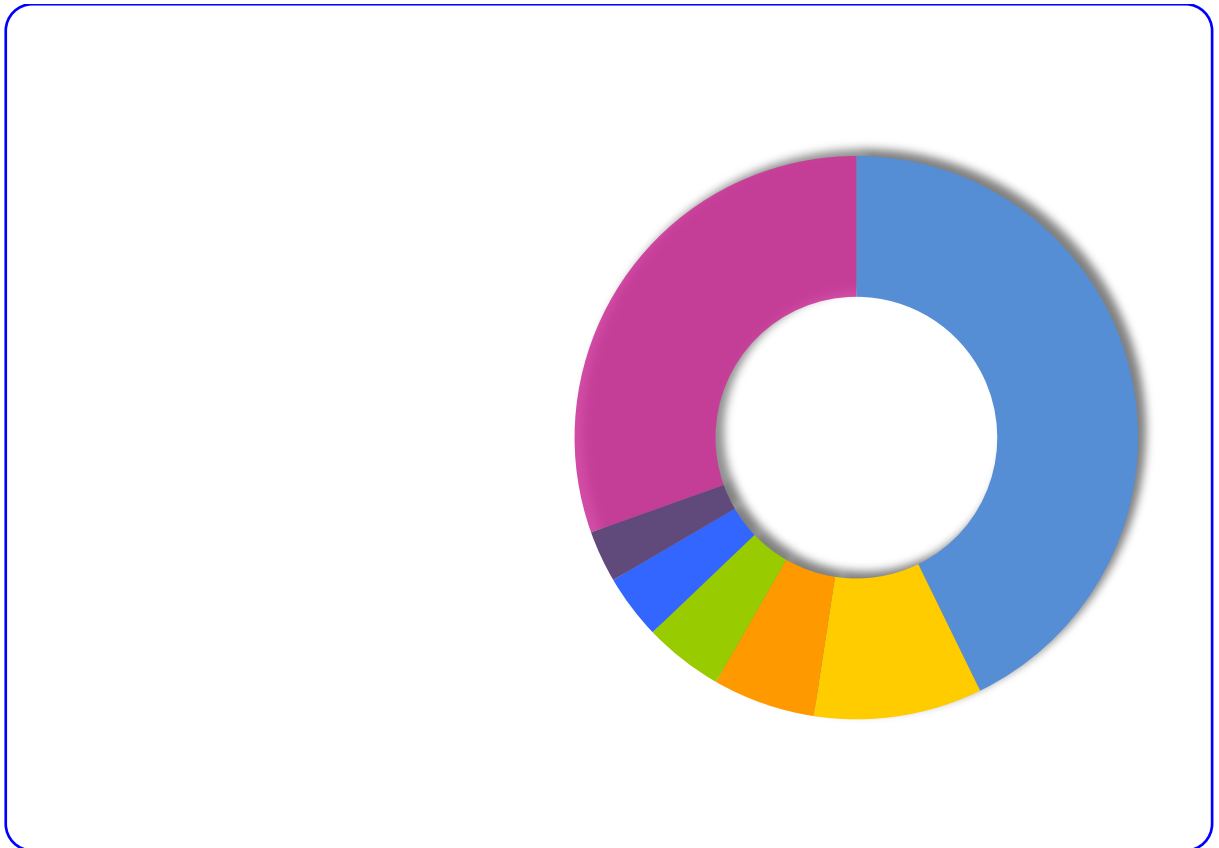
Table 10: Exports Of Pet Food, In Value Terms, By Country Of Destination, 2007-2014 (million USD)

COUNTRY/PERIOD	Units	2007	2008	2009	2010	2011	2012	2013	2014	CAGR 2007-2014
Canada	USD									%
Japan	USD									%
Australia	USD									%
Mexico	USD									%
Hong Kong	USD									%
New Zealand	USD									%
Rep. of Korea	USD									%
Philippines	USD									%
Costa Rica	USD									%
Others	USD									%
Total	USD									%

Source: *****

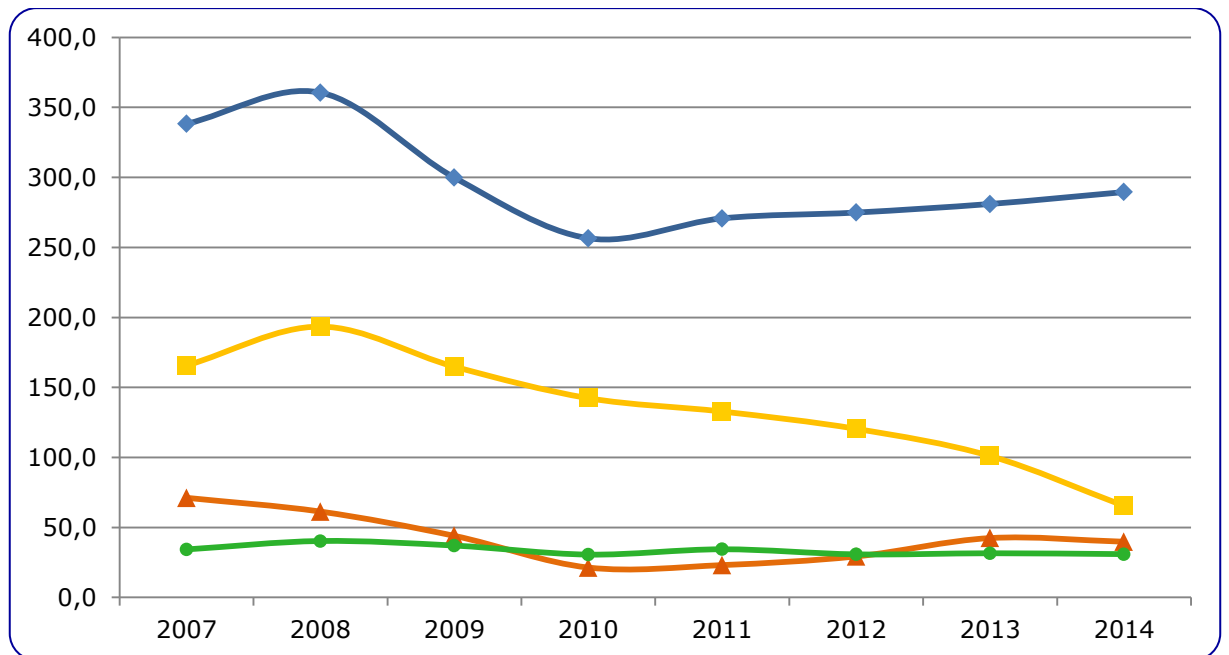
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Figure 17: Exports Of Pet Food, In Value Terms, By Country Of Destination, 2014
(%, based on tonnes)



Source: *****

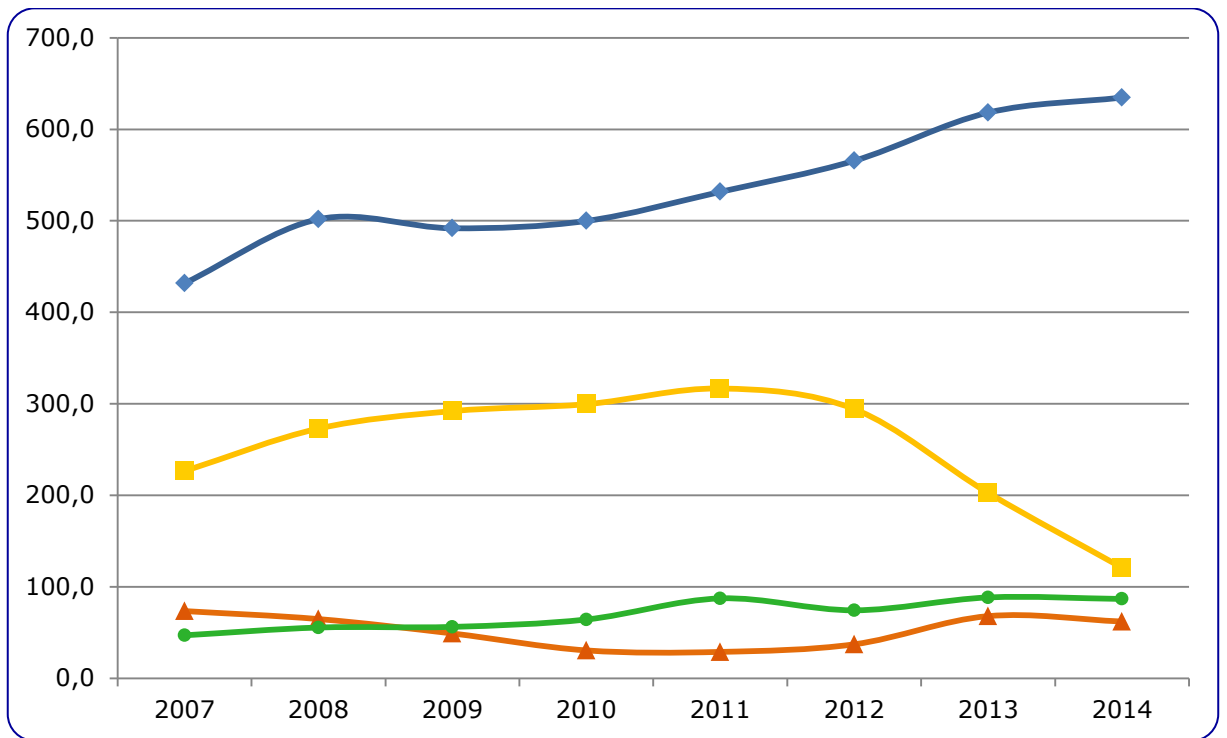
Figure 18: Exports Of Pet Food, In Physical Terms, By Country Of Destination, 2007–2014
(thousand tonnes)



Source: *****

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Figure 19: Exports Of Pet Food, In Value Terms, By Country Of Destination, 2007–2014 (million USD)



Source: *****

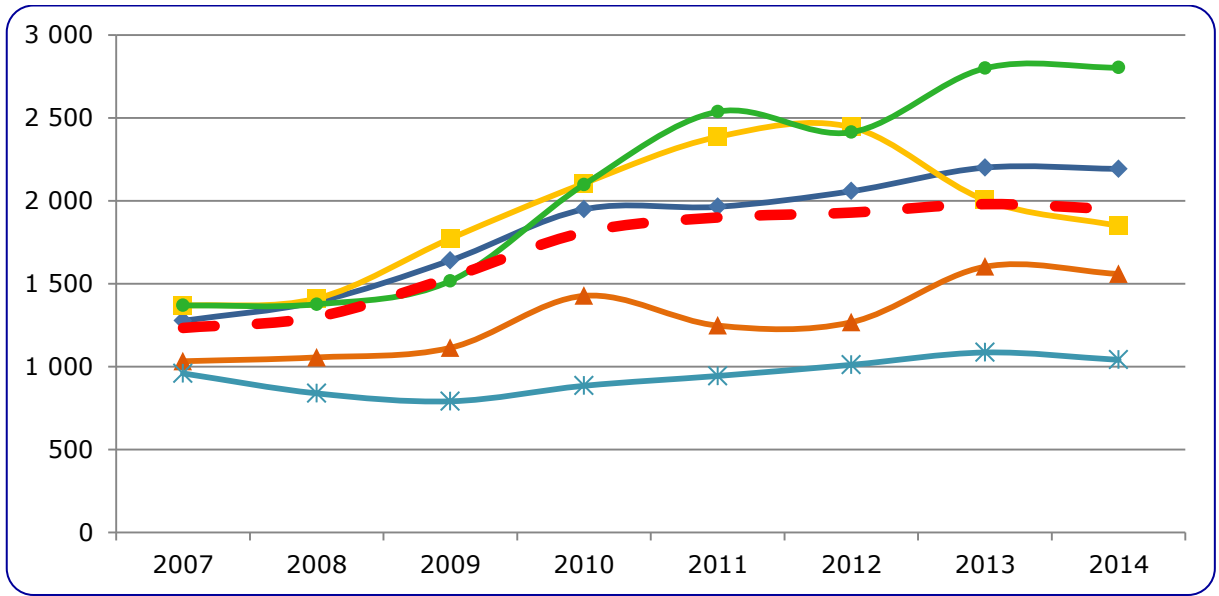
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6.3 EXPORT PRICES BY COUNTRIES

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For more information on export prices of pet food by countries, see Appendix 1.

Figure 20: Export Prices Of Pet Food, By Country of Destination, 2007-2014 (USD per tonne)



Source: *****

Table 11: Export Prices Of Pet Food, By Type and Country Of Destination, 2007-2014 (USD per tonne)

Country	2007 USD/ tonne	2008 USD/ tonne	2009 USD/ tonne	2010 USD/ tonne	2011 USD/ tonne	2012 USD/ tonne	2013 USD/ tonne	2014 USD/ tonne
230910 - Dog or cat food (retail)								
Canada								
Japan								
Mexico								
Australia								
Philippines								
New Zealand								
Rep. of Korea								
Average								

Source: *****

B 7. COMPETITIVE LANDSCAPE

This particular U.S. industry comprises establishments primarily engaged in the manufacturing of dog and cat food from ingredients, such as grains, oilseed mill products, and meat products.

This Industry is comprised of:

- Animal feed mills, dog and cat, manufacturing;
- Animal feeds, prepared, dog and cat, manufacturing;
- Cat food manufacturing;
- Dog and cat food (e.g., canned, dry, frozen, semimoist), manufacturing;
- Dog food manufacturing;
- Feed supplements, dog and cat, manufacturing;
- Feeds, prepared for dog and cat, manufacturing;
- Horsemeat, processing, for dog and cat food;
- Meat canning, dog and cat, pet food, made from purchased carcasses;
- Meat products, dog and cat, pet food, canning, made from purchased carcasses;
- Pet food, dog and cat, manufacturing.

7.1 INDUSTRY SNAPSHOTS

Table 12: Key Industry Statistics: Pet Food Manufacturing

Item	2008	2012	08-12 % Chg
Number of establishments			%
Value of shipments (\$ Millions)			%
Annual payroll (\$ Millions)			%
Total employment			%
Value of shipments per establishment (\$1,000)			%
Value of shipments per employee (\$1,000)			%
Value of shipments per \$ of payroll (\$)			%
Payroll per employee (\$)			%
Employees per establishment			%
Value of shipments per capita (\$)			%
Population per establishment			%
Population in the U.S. (million persons)			%

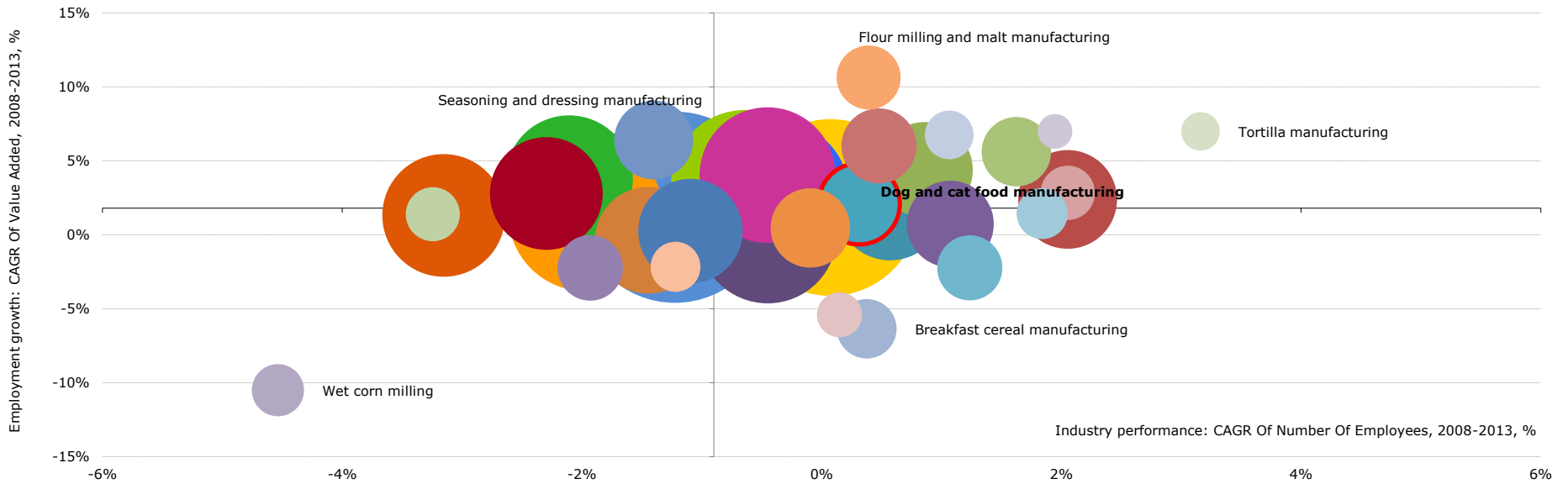
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7.2 INDUSTRY LIFE CYCLE

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Figure 21: Industry Life Cycle
 Size of a bubble represents industry value added
 X and Y axes represent data for US food manufacturing sector



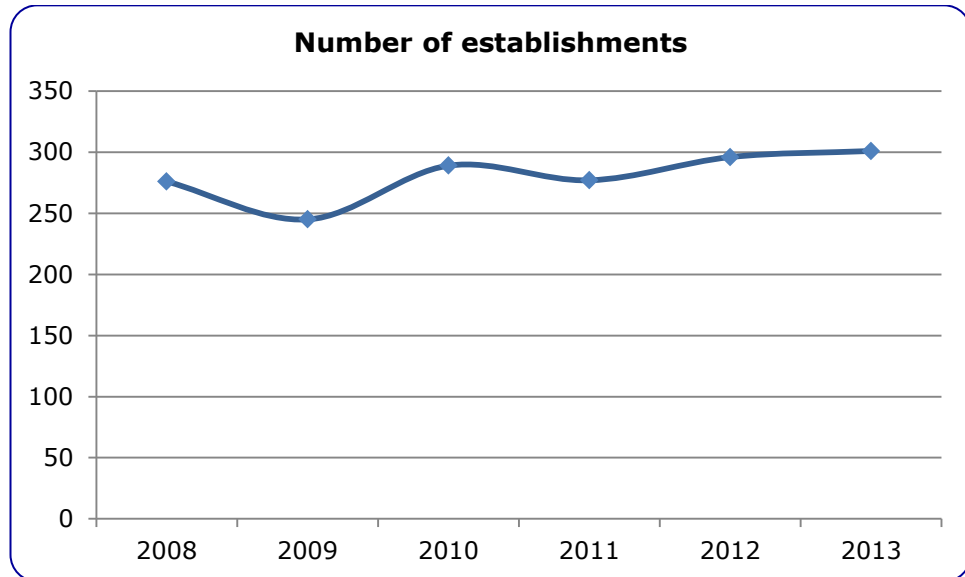
Source: *****

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7.3 BUSINESS LOCATIONS

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Figure 22: Numbers Of Establishments, 2008-2013



Source: *****

Pet food manufacturers are mainly situated in the Southeast, the West, the Mid-Atlantic and the Great Lakes regions of the United States.

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Table 13: Number Of Establishments, By State, 2012

State	Number of Establishments
Alabama	
Alaska	
Arizona	
Arkansas	
California	
Colorado	
Connecticut	
Delaware	
District of Columbia	
Florida	
Georgia	
Hawaii	
Idaho	
Illinois	
Indiana	
Iowa	
Kansas	
Kentucky	
Louisiana	
Maine	
Maryland	
Massachusetts	
Michigan	
Minnesota	
Mississippi	
Missouri	
Montana	
Nebraska	
Nevada	
New Hampshire	
New Jersey	
New Mexico	
New York	

B

State	Number of Establishments
North Carolina	
North Dakota	
Ohio	
Oklahoma	
Oregon	
Pennsylvania	
Rhode Island	
South Carolina	
South Dakota	
Tennessee	
Texas	
Utah	
Vermont	
Virginia	
Washington	
West Virginia	
Wisconsin	
Wyoming	

*Source: ******

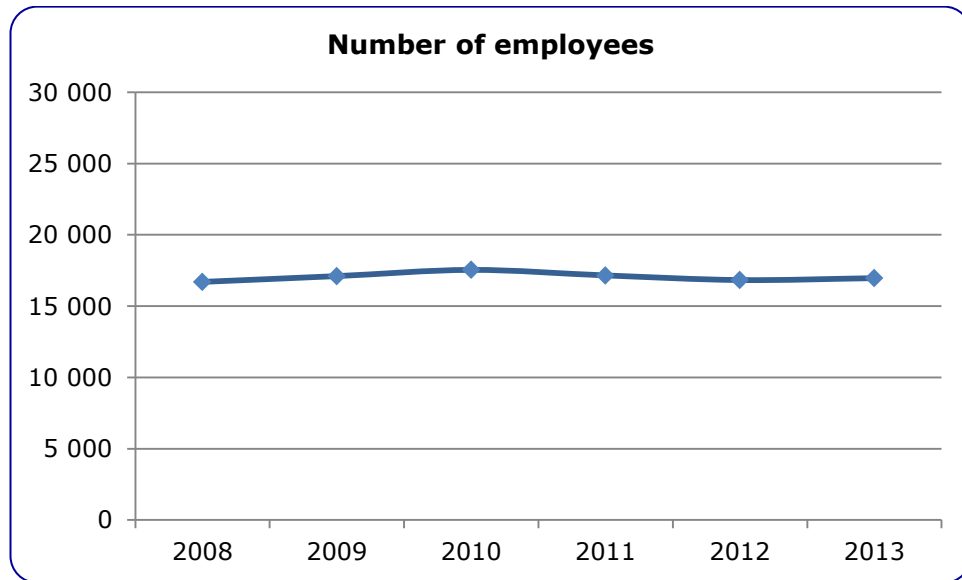
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7.4 EMPLOYMENT

...

For a complete list of the number of employees engaged in the pet food industry by States, see Table 14.

Figure 23: Number Of Employees, 2008-2013



Source: *****

...

Table 14: Number Of Employees, By State, 2013

State	Number of Employees
Alabama	
Alaska	
Arizona	
Arkansas	
California	
Colorado	
Connecticut	
Delaware	
District of Columbia	
Florida	
Georgia	
Hawaii	

B

State	Number of Employees
Idaho	
Illinois	
Indiana	
Iowa	
Kansas	
Kentucky	
Louisiana	
Maine	
Maryland	
Massachusetts	
Michigan	
Minnesota	
Mississippi	
Missouri	
Montana	
Nebraska	
Nevada	
New Hampshire	
New Jersey	
New Mexico	
New York	
North Carolina	
North Dakota	
Ohio	
Oklahoma	
Oregon	
Pennsylvania	
Rhode Island	
South Carolina	
South Dakota	
Tennessee	
Texas	
Utah	

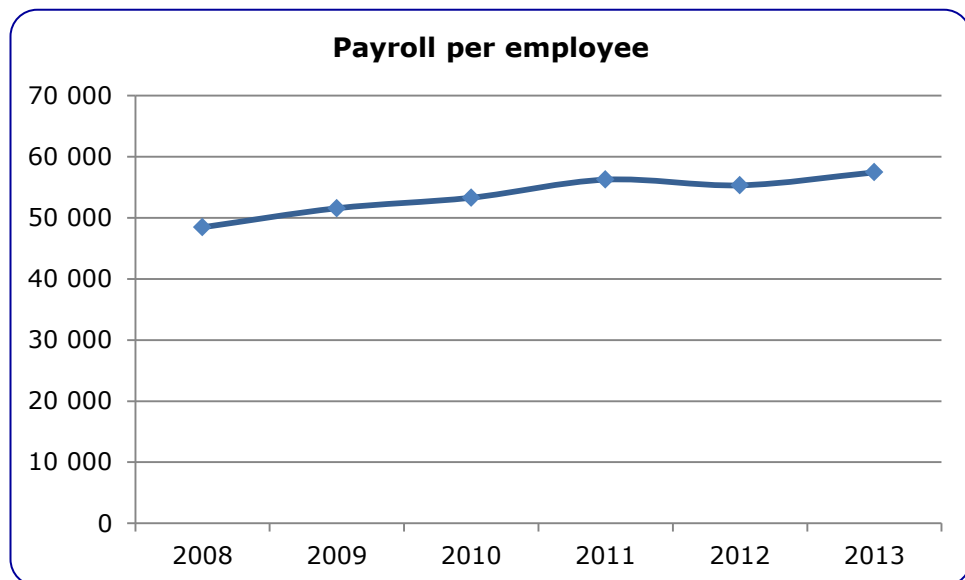
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State	Number of Employees
Vermont	
Virginia	
Washington	
West Virginia	
Wisconsin	
Wyoming	

7.5 ANNUAL WAGE

...

Figure 24: Payroll Per Employee, 2008-2013 (USD)



Source: *****

...

B

Table 15: Payroll Per Employee, By State, 2013
(USD)

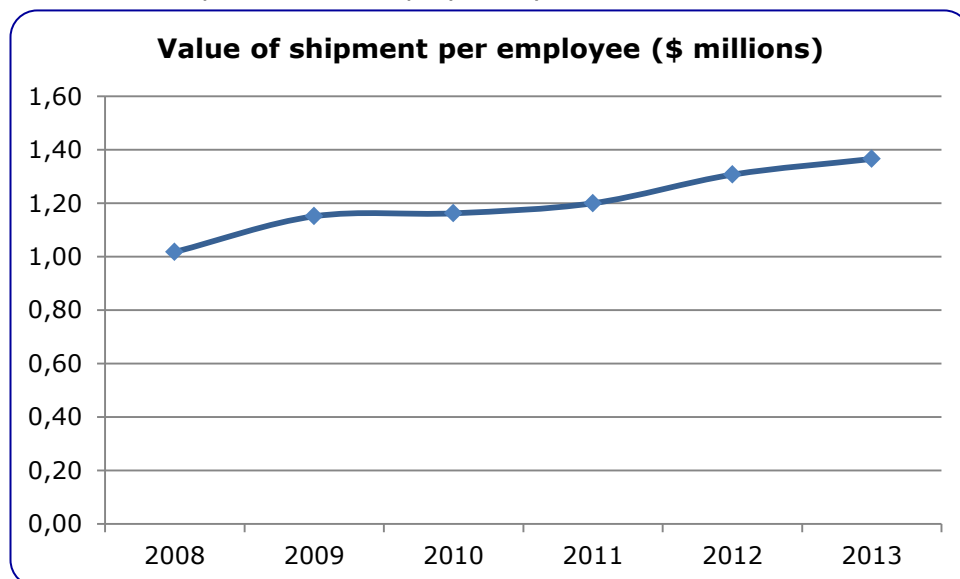
State	Payroll per employee (\$)
Alabama	
Alaska	
Arizona	
Arkansas	
California	
Colorado	
Connecticut	
Delaware	
District of Columbia	
Florida	
Georgia	
Hawaii	
Idaho	
Illinois	
Indiana	
Iowa	
Kansas	
Kentucky	
Louisiana	
Maine	
Maryland	
Massachusetts	
Michigan	
Minnesota	
Mississippi	
Missouri	
Montana	
Nebraska	
Nevada	
New Hampshire	
New Jersey	
New Mexico	

B

State	Payroll per employee (\$)
New York	
North Carolina	
North Dakota	
Ohio	
Oklahoma	
Oregon	
Pennsylvania	
Rhode Island	
South Carolina	
South Dakota	
Tennessee	
Texas	
Utah	
Vermont	
Virginia	
Washington	
West Virginia	
Wisconsin	
Wyoming	

7.6 INDUSTRY PRODUCTIVITY

Figure 25: Value Of Shipments Per Employee, By State, 2008-2013



Source: *****

B

...

Table 16: Value Of Shipments Per Employee, By State, 2012

State	Value of Shipments per employee (\$)
Alabama	
Alaska	
Arizona	
Arkansas	
California	
Colorado	
Connecticut	
Delaware	
District of Columbia	
Florida	
Georgia	
Hawaii	
Idaho	
Illinois	
Indiana	
Iowa	
Kansas	
Kentucky	
Louisiana	
Maine	
Maryland	
Massachusetts	
Michigan	
Minnesota	
Mississippi	
Missouri	
Montana	
Nebraska	
Nevada	
New Hampshire	

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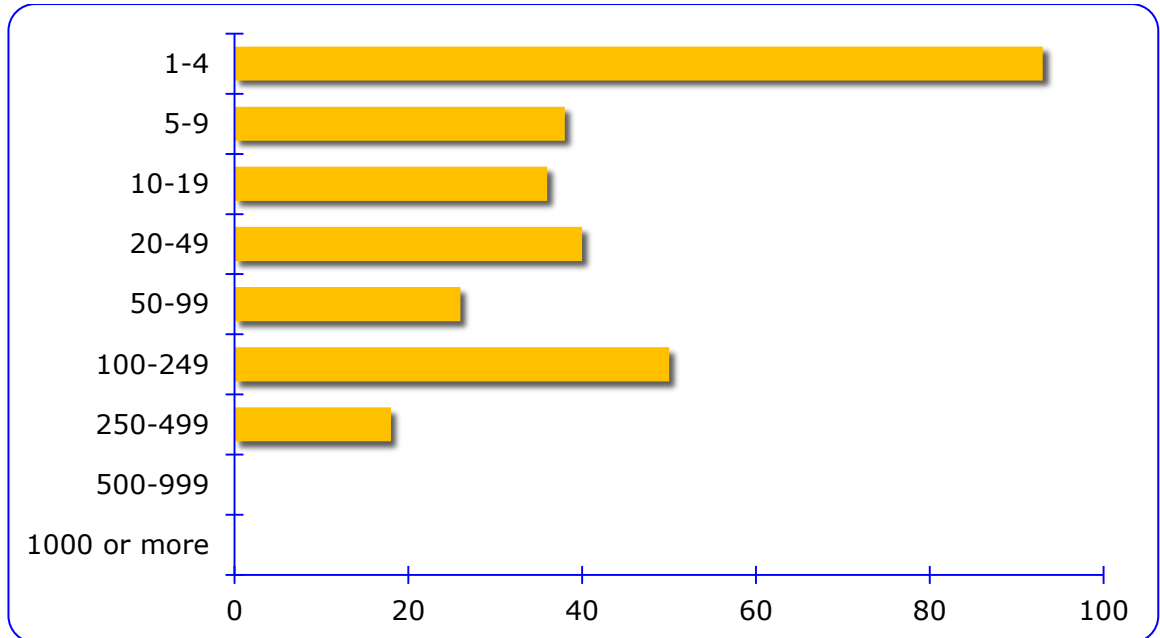
State	Value of Shipments per employee (\$)
New Jersey	
New Mexico	
New York	
North Carolina	
North Dakota	
Ohio	
Oklahoma	
Oregon	
Pennsylvania	
Rhode Island	
South Carolina	
South Dakota	
Tennessee	
Texas	
Utah	
Vermont	
Virginia	
Washington	
West Virginia	
Wisconsin	
Wyoming	

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7.7 ESTABLISHMENT SIZE AND LEGAL FORM

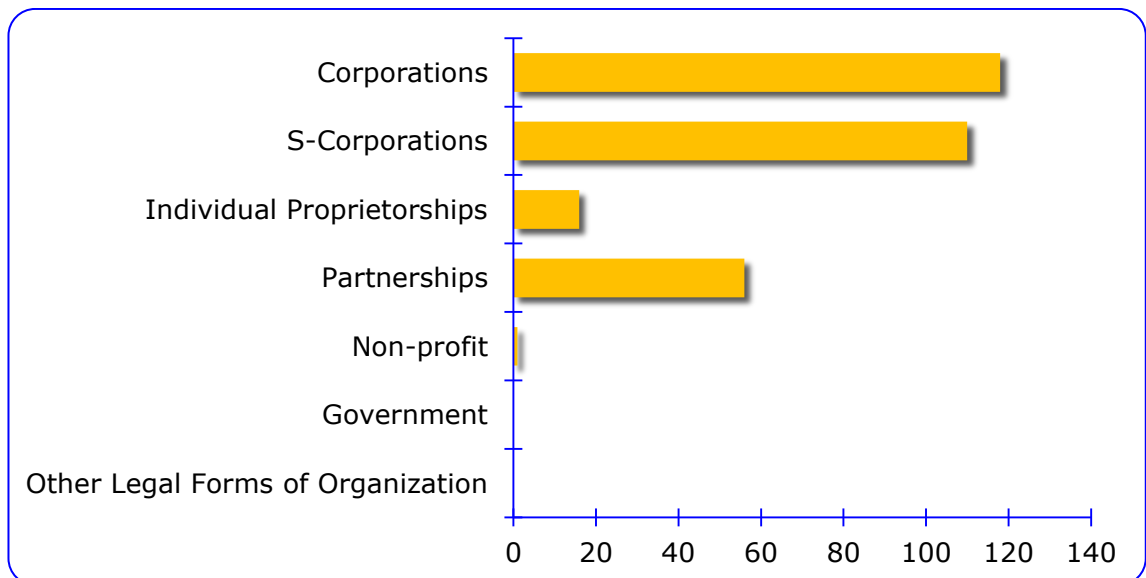
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Figure 26: Number Of Establishments By Employment Size, 2013



Source: *****

Figure 27: Number Of Establishments By Legal Form Of Organization, 2013



Source: *****

B 8. COMPANY PROFILES

Company	City	State	Turnover	Contact details
The IAMS Company				
Fromm Family Foods, LLC				
Mars, Incorporated				
Royal Canin U.S.A., Inc.				
Mars Petcare Us, Inc.				
Bil-Jac Foods Inc.				
Nestle Purina Petcare Company				
Toby-O Inc				
Pro-Pet, L.L.C.				
Midwestern Pet Foods Inc				
Spf North America, Inc.				
Best Feeds & Farm Supplies, Inc.				
Merrick Petfoods, Inc.				
Nunn Milling Company Inc				
Harbinger of A New Age				
Apn, Inc.				
Bentley's Corner Barkery, Ltd.				
Three Dog Bakery, LLC				
Schell & Kampeter, Inc.				
Mountain Country Foods, LLC				
Sunshine Mills, Inc.				
Blue Buffalo Company, Ltd.				
Simmons Pet Food, Inc.				
American Nutrition, Inc.				
Northwest Pet Products, Inc.				
Big Heart Pet Brands				
Hill's Pet Products, Inc.				
Wellpet LLC				
Eagle Pet Products, Inc.				
Weld County Bi-Products, Inc				
The Meow Mix Company				
Merrick Natural Petworks Inc				
Valley Feed and Supply, Inc.				
Mars Overseas Holdings, Inc				
Bravo , LLC				
Conscious Corner, LLC				
Salix Animal Health, LLC				
Phibro Animal Health Holdings, Inc.				
Bark To Basics, LLC				
Wellytails, Inc.				
The Nutro Company				
Texas Farm Products Company				
Isonova Technologies LLC				
Red Bandanna Pet Food				

B

Please note that the sample provided serves as an example of the report structure. Should you require a sample focusing on markets for another products , do not hesitate to contact me.



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