



PetFood Forum 2014



March 31 – April 2, Schaumburg, IL

Pet Business

# Distributor Consolidation in the Pet Specialty Channel

a presentation by

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## PET SPECIALTY CHANNEL

**DISTRIBUTOR SALES**

**\$3.3 billion**

**RETAIL SALES**

**\$4.45 billion**

### DISTRIBUTOR SUPPORT

**104**

distribution  
centers

**7.5 million**

square feet of  
warehouse  
space

**\$326 million**

in on-hand inventory

**3 million**

deliveries

**\$1,076** average  
invoice/delivery

**5,400**

dedicated  
employees

**962**

sales  
people

**51**

trade  
shows

**21,000**

attendees



# Distributor Consolidation at a Glance

## Animal Supply Company

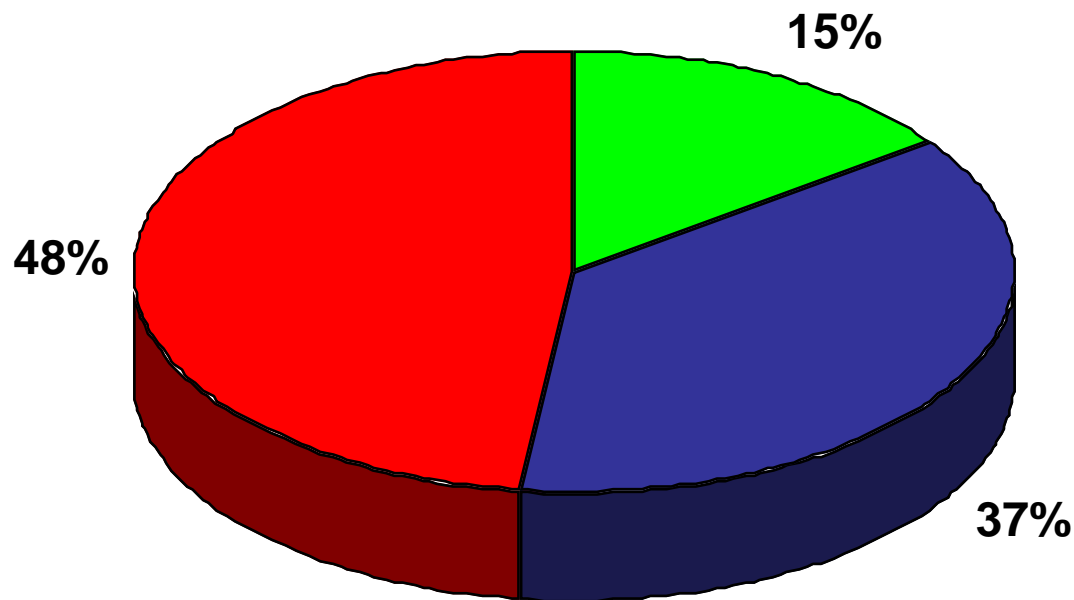
Pet Food Wholesale - Brea, CA  
Wholesome Pet Dist. - Orrville, OH  
Summit Pet Product Dist. - Greensboro, NC  
Zeuss & Co. California - Commerce, CA  
Lone Star Pet Supply - Schertz, TX  
RFG Distributing Inc. - New Hope, MN  
Elf Pet Products - Longwood, FL

## Phillips Pet Food & Supplies

PFX Pet Supply - West Sacramento, CA  
Pet Food Limited - Tampa, FL  
Pet Food Limited Colorado - Denver, CO  
Royal Pet - Brentwood, NY  
Mike's Feed Farm Wholesale - Paterson, NJ  
Super-Dog Pet Food Co. - Leola, PA  
Wolverton - Lansing, MI  
K&H - Clyde, OH  
Chart Pet Supply, Indianapolis, IN  
Best Friend Products Corp. - Chalfont, PA



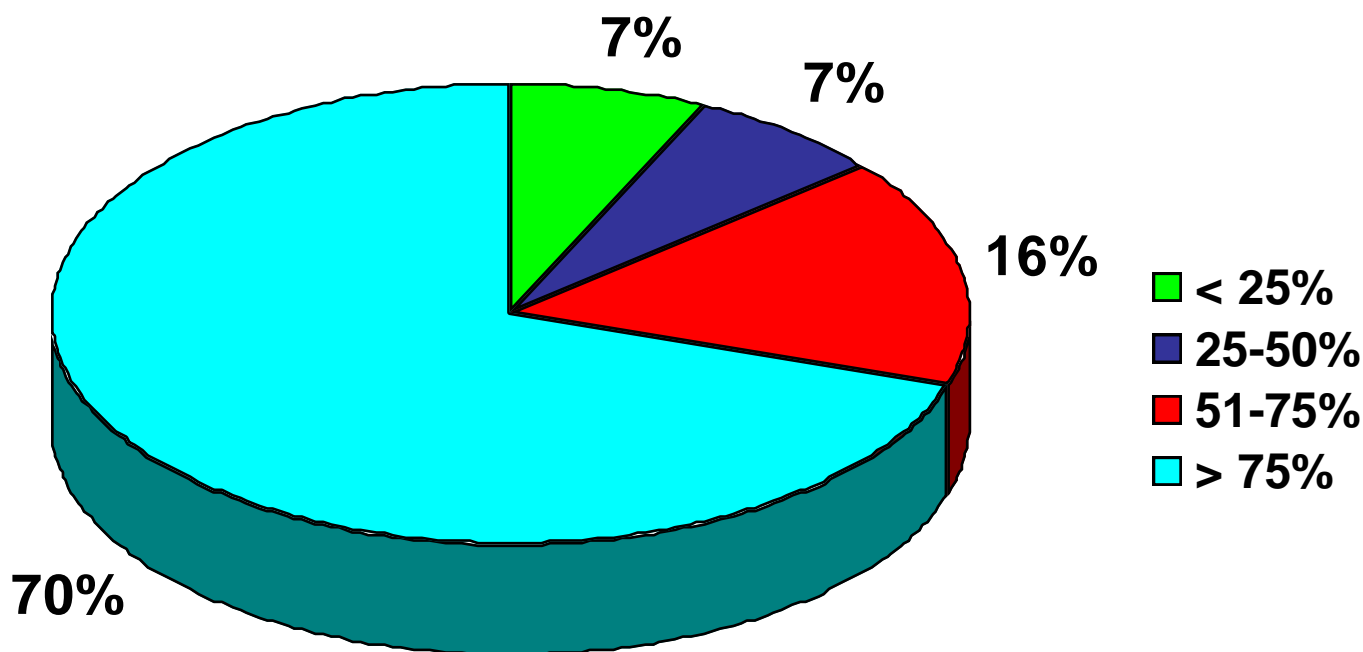
# How concerned are you about consolidation among distributors?



■ not concerned ■ very concerned ■ somewhat concerned

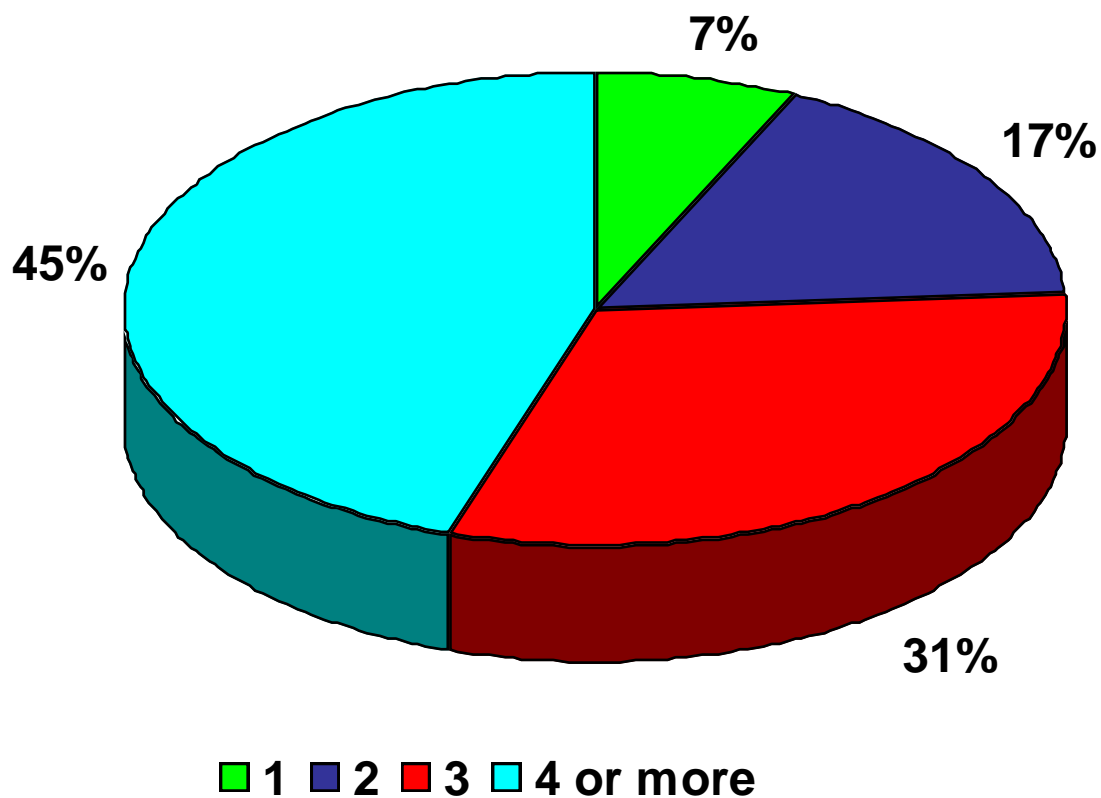


# How much of your pet food selection is purchased through distributors?



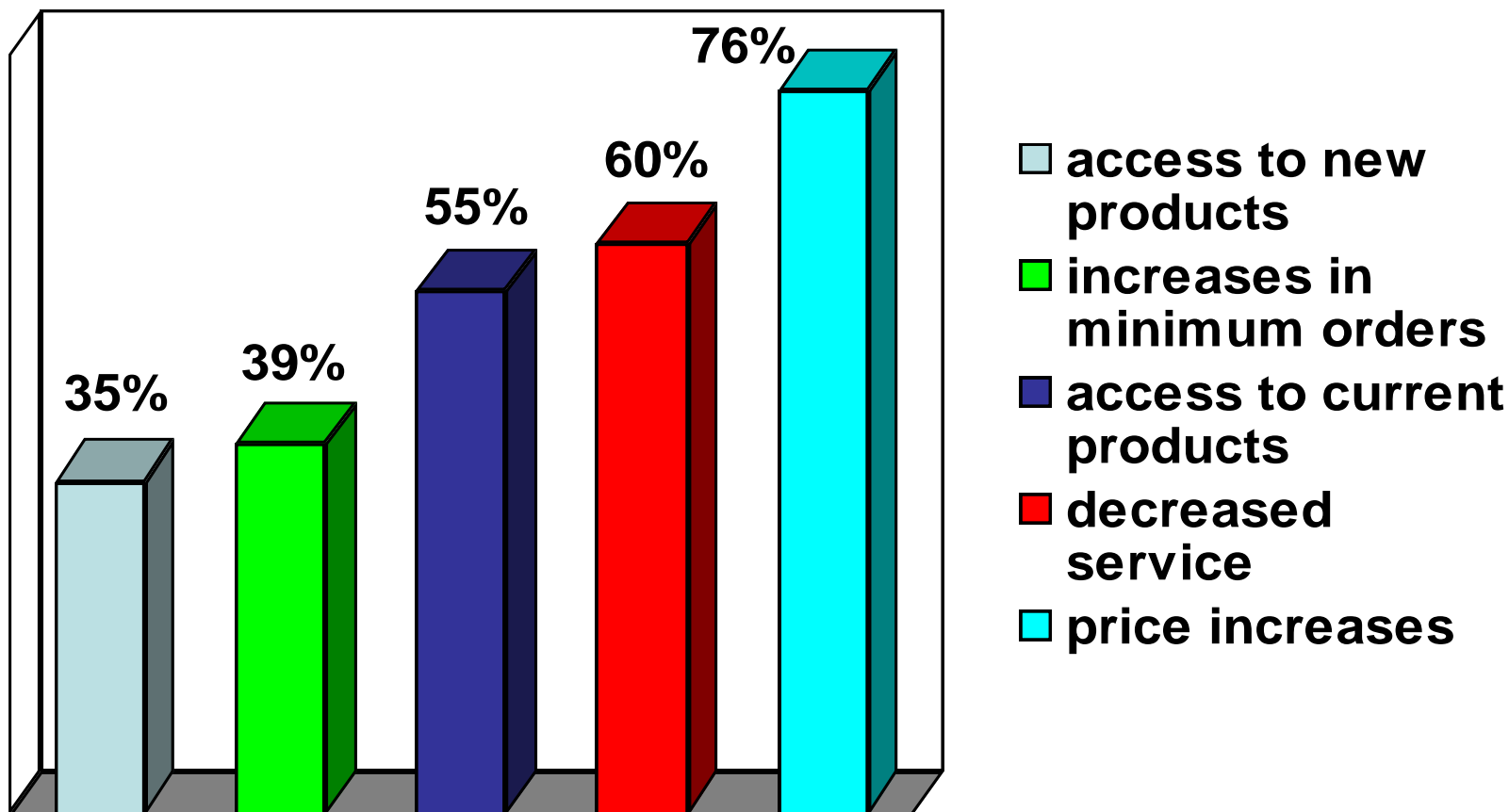


# How many distributors do you regularly use as pet food suppliers?





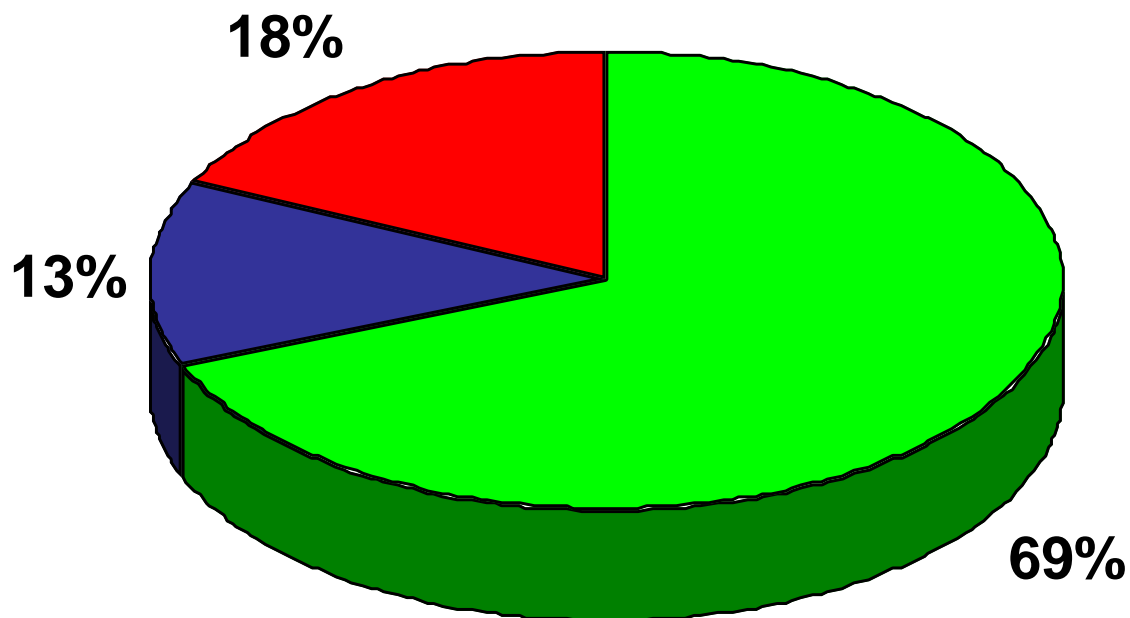
# What are your main concerns about distributor consolidation? (select all that apply)







# How receptive are you to taking on new pet food lines?



- open to taking on the right line
- actively looking for new lines
- not interested at all



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