

## 1.0 Table Of Contents

<b>Chapter</b>	<b>Page</b>
1.0 Table Of Contents .....	2
2.0 Introduction And Scope Of Report .....	7
3.0 A Wide-Angle View Of The Consumer e-Commerce Market, The Drivers And Key Trends, And The Leading Competitors And Their Actions .....	14
3.1 What Is e-Commerce? .....	16
3.2 The Amazing Growth Rate Of Consumer e-Commerce And Its Seismic Impact On Retailing, Supply Chain Management, Distribution, And Fast, Convenient Home Delivery Services .....	18
3.2.1 USA Consumer e-Commerce (B2C) Sales Growth Rate And Growing Share Of Total Retail Sales .....	21
3.2.2 Are Seeing A Seismic Shift In Retail In The New Digital Customer-Driven Economy, Led By Consumer e-Commerce's Disruptive Impact On Traditional Retailing, Shopping Malls, Supply Chain Management, Distribution, And Instant Gratification From Fast, Convenient Home Delivery Services - Consumers Are At The Intersection Of e-Commerce Avenue And Bricks & Mortar Road - Legacy Retailers Are Trying To Play Catch-Up And Build Hybrid Online-Offline Businesses To Survive In The New Omnichannel World Of Retailing Providing Thrilling Experiences ....	29
3.2.2.1 The e-Commerce Transformation Is Hollowing Out Suburban Shopping Malls, Strip Centers, And Downtown Retail Stores, Bankrupting Longtime Brands And Leading To Staggering Retail Job Losses As Many Of The Larger Distressed Retail Chains Are Scaling Back Their Footprints .....	33
3.2.2.2 Online Retail And Traditional Stores Can Coexist And Even Thrive Together, Using A New "Omnichannel" (Dual Channel) Strategy That Is Widely Accepted By Most Consumers - It's All About A Seamless Online And In-Store Shopping Experience And Locations - And In Malls, Food Is The New Fashion, And Fitness Is The New Food As Retailers Are Adapting To Survive By Changing The Omnichannel Shopping Experience .....	43
3.2.2.3 Mobile Commerce, Mobile Apps, And Web Experiences .....	50
3.2.2.4 Amazon Prime Has Been The Mother Lode In Boosting Amazon's e-Commerce Sales .....	53
3.2.2.5 Walmart Arrived Late To The Party vs Amazon For Cheap Two-Day Home Delivery For Online Purchases .....	56
3.2.2.6 Voice-Enabled Shopping Is The Next Consumer Experience Objective, And Amazon, Walmart, Target, And Google Are Going For It Competitively .....	59
3.2.2.7 Advances In Distribution And Product Fulfillment, Supply Chain Management, And Fast Home Delivery Are At The Heart Of The Rise Of e-Commerce, But The Physical Distribution System Is Strained, Costly, And Capital Intensive .....	64

3.2.2.8 Age Demographics Are Important For e-Commerce .....	78
3.2.3 Headwinds To e-Commerce Growth Include State Sales Taxes And Collection, Increasing Urban Traffic Congestion, And Product Returns Challenges .....	84
3.3 Amazon.com Is The Dominating e-Commerce Retailer And Digital Goliath In The USA .....	92
3.4 Wal-Mart Stores Inc. And Other Brick-And-Mortar Retailers Are Fighting To Breakout And Build Competitive Consumer e-Commerce Businesses To Compete With Amazon.com.....	135
3.5 Target Corporation Is Struggling And Trying A Different e-Commerce Strategy From That Of Amazon.com And Walmart; Google Has Been A Laggard In e-Commerce With Its Google Express, But Is Now Trying To Be More Of A Big League Player.....	156
3.6 Amazon.com Inc.'s e-Commerce Retailing Business Model Is Motivating Start-Up Entrepreneur Online Retailers - Hollar Inc. Is A Rising Star .....	160
3.7 China Has Emerged As An Online Retailing Behemoth - Chinese e-Commerce Giants Alibaba Group Holding and JD.com Are The Power Players In Asia For Now, But Vipshop Holdings Inc. And Baozun Inc. Are Growing Fast.....	162
3.8 Food Is The Most Challenging Retail e-Commerce Market - Are Seeing Food Fights Between Supermarket Retail Chains, Local Grocers, Mass Merchandisers And Warehouse Clubs, Convenience Stores, Restaurants, And Foodservices With Online Food Selling - Fast, Safe And Economical Home Delivery Of Fresh Foods Is A Critical Factor And "Last-Mile" Hurdle .....	175
3.8.1 The USA Food Marketing System Size And Scope .....	176
3.8.2 Changing Consumer Expectations, Attitudes, And Behavior In Buying Food In Stores Or Online - Today's Mobile And Internet Savvy Consumers Are Dramatically Influenced By Emotion With Cause-Based Demands And Lack Channel Loyalty .....	187
3.8.3 Amazon Hungers To Pile Grocery Stores Onto Its Plate - And Amazon's Looming Presence In The Grocery Sector With Purchase Of Whole Foods Market's Physical Stores Has Traditional Grocery Retailers Scrambling And Worried As Amazon's Disruptive Style Could Reshape Food Retailing And Food e-Commerce Competitive Dynamics .....	202
3.8.4 Fast, Effective, Safe And Affordable Home Delivery Of Food Is The Rate Limiting Factor For Food e-Commerce Growth - There Are Varying Home Delivery Methods And Home Delivery Services Offered By Store And Non-Store Retailers And Food Services Offering Mobile And Online Sales .....	223
3.9 Key Takeaways About The USA Consumer e-Commerce Market Disruption Of Consumer Packaged Goods Retailing And With Food And Food Services - Major Trends And Their Implications Looking To The Future .....	250

4.1 The Companion Animals Consumer e-Commerce Market Is Also Growing With Disruptive Intensity Between Online Retailers, Brick And Mortar Retailers, And Veterinarians For Regulated Pet Healthcare Products, Pet Consumer Packaged Goods, Petfoods And Treats - Analysis Of The Drivers, Key Trends, The Leading Competitors And Their Retailing Actions Going Forward Into 2018 .....	271
4.2 Backgrounder On The Many Pet Products OTC Retail Channels - Plus Implications Of Generational Demographic Changes On Retail Buying .....	275
4.3 Growth Rate For Consumer e-Commerce For Pet Products .....	280
4.4 Pet Products' e-Commerce Genesis Started In The 1990's Dot.com Era And Has Evolved Into Today's Oligopoly Of Amazon And PetSmart Who Have Used M&A To Achieve Total Dominance Of Mobile And Online Sales Of Pet Products And Pet Foods And Drive The Ongoing Retail Market Disruption .....	292
4.4.1 The Many Pet e-Tailers Starting-Up In The 1990's Dot-Com Craze Were Consolidated Down To Just Two Leaders By 2001: PetSmart's PetSmart.com And Petco Animal Supplies's Petco.com .....	293
4.4.2 The Evolution From 2001 To 2017: Amazon Joined PetSmart.com As The Big Gorillas In Pet Foods And Pet Products & Accessories e-Commerce .....	307
4.4.3 Online Pharmacies Selling Pet Medications Is A Big Disruptive Force On The Veterinary Profession - Including Regulatory And Trade Practice Challenges Led By Consumer Demands For Portable Veterinary Prescriptions Needed For Legal Rx Animal Drug Purchases At Online Pharmacies .....	323
4.4.4 Veterinarians Have Adapted By Using Third-Party Pharmacy Suppliers With Home Delivery (VetSource And Vets First Choice) - Are Seeing Trade Channel Blurring .....	350
4.4 Key Takeaways About The USA Consumer e-Commerce Market For Pet Products, Food, Accessories, And Medications - Major Trends And Their Implications Looking To The Future.....	361
5.0 Appendix: Animal Health Product Regulatory And Category Definitions In The USA...	377
6.0 About North American Veterinary Community (NAVC) And Fountain Agricounsel LLC .....	383

<b>List Of Tables</b>	<b>Page</b>
Table 3.1 Top 10 Retailers Globally In 2015 Based On Revenues In US\$ .....	94
Table 3.2 Forbes' Power Ranking Of The World's Biggest Public Companies - Listing In May 2016 - Ranking Is Measured By A Composite Scoring Of 2015 Revenues, Profits, Assets And Market Value .....	95
Table 3.3 Dominant Operational Format For Top 15 Retailers Globally In 2015 .....	96
Table 3.4 Fortune Magazine's 2015 Retail Fortune 500 Rankings And Ranking Comparisons 2008 - 2015 .....	97
Table 3.5 Top 15 e-Retailers Globally - As Ranked By Deloitte Touche Tohmatsu Limited Analysis For FY2015 Revenues .....	98
Table 3.6 e-Commerce Sales Revenue Of The Top 25 USA e-Commerce Retailers In 2015 Sales Are Ranked By Annual Sales .....	99
Table 3.7 Market Shares In China's Online B2C Retail Market - For 3rd Quarter 2016 ...	163
Table 3.8 Top 10 Retailers Globally - Walmart Leads .....	179
Table 3.9 Sales Of The Leading Supermarket Retailers In The USA In 2016 .....	179
Table 3.10 USA Supermarket Retailers' Revenue Market Shares - 2015 Basis .....	180
Table 3.11 Channel Shopping Frequency For Food In The USA .....	193
Table 3.12 Home Delivery And/Or Customer Pickup Via Click & Collect Options Used By Leading Grocery Retailers For Mobile And Online Food Sales .....	229
Table 3.13 Home Meal Kit Retailers Who Sell Online And Mobile .....	231
Table 3.14 Home Delivery Service Companies Providing Apps For On-Demand Grocery And Ready-To-Eat Meals Delivery Services For Mobile And Online Orders With Participating Food Retailers (Supercenters, Grocery Stores, Convenience Stores, Dollar Stores, and Other Independent Sellers, Restaurants, And Foodservices) .....	240
Table 3.15 Summary Comments On Home Delivery Service Companies And Those Offering App Takeout Services .....	245
Table 4.1 Pet Product Shopping Patterns By Channel - Percentage (%) Draw Among US Pet Product Purchases Trend .....	281
Table 4.2 Survey: I Am Buying Pet Products Online More Than I Used To - % Of US Pet Product Buyers .....	281
Table 4.3 Retail Purchasing Patterns Among US Adults For Pet Nutrition Products In The Last 30 Days - National Pet Owner Survey In June/July 2017 By Packaged Facts ....	282
Table 4.4 US: Pet Care e-Commerce Sales vs. Total e-Commerce, Total Retail And Total Pet Care (CAGRs) 2010-2014 .....	283
Table 4.5 Online Sales By Category For Top CPG Categories Ranked By 1010Data In 2016 .....	284

Table 4.6 Pet Care Is The Fastest Growing CPG Category In Online Sales In 2016 - For CPG Categories With At Least \$500M In Sales - Ranked By 1010Data .....	285
Table 4.7 Amazon Sales In Q3 2017 For Pet Products In The USA, UK, Germany, Canada, And France .....	288
Table 4.8 Pet Care Internet Retail Turnover Globally Grew By 90% 2012-2017 .....	289
Table 4.9 Percent Market Share Of Global Internet Sales of Dog and Cat Food - 2011 Vs 2016 .....	289
Table 4.10 Some Of The "Too Many And Confusingly Similar" Company Names For Online Retailers In The Dot-com Era .....	293
Table 4.11 Start Dates For Some Of The 1990's Explosion Of Online Pet Retailers - Most Did Not Survive .....	294
Table 4.12 Top Pet Food Website's Market Shares, By Online \$ Sales In 1Q 2016, USA312	
Table 4.13 PetMed Express Inc. Sales Tracking - PetMed Express Inc.'s Fiscal Year Runs From 1 April - 31 March .....	326
Table 4.14 The Currently Accredited Online Pet Medication Pharmacies In The USA With NABP ".Pharmacy" Verified Websites - November 2017 Status .....	333
Table 4.15 A Look Back In Time To 2012 - Listing Of Some Of The Many Companies Marketing Rx Pet Medications, Pet Products, And Pet Foods Online .....	335