

Pet Care in Middle East and Africa

May 2024

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Key findings

REGIONAL OVERVIEW

Bigger cat than dog populations in many of the region's countries

Middle East and Africa has the lowest pet care sales and per capita spend

Positive annual growth rates expected for value sales throughout the 2019-2029 period

Saudi Arabia's cat population continues seeing dynamic growth in 2024

Both cat food and dog food record dynamic growth in Saudi Arabia over 2019-2024

Cat food most dynamic and adds most new sales over the 2019-2024 period

Pet populations and pet food sales generally on the rise across the region

Pet humanisation and premiumisation helping to drive value growth in pet care

Pet shops and superstores the main pet care distribution channel in the region

Retail e-commerce continues growing its share

LEADING COMPANIES AND BRANDS

Relatively high levels of concentration across most pet care markets in the region

Mars remains a strong leader in pet care in Middle East and Africa

South Africa the main revenue generator for half of the top 10 players in the region

Mars' Royal Canin and Whiskas brands continue to lead Middle East and Africa pet care

FORECAST PROJECTIONS

Positive value growth expected throughout the forecast period for pet care

Saudi Arabia will record the strongest growth in the region

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Egypt: Competitive and Retail Landscape

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Israel: Competitive and Retail Landscape

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Morocco: Competitive and Retail Landscape

Saudi Arabia: Market Context

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United Arab Emirates: Competitive and Retail Landscape

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