

# Pet Care in Western Europe

May 2024

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Scope

Key findings

## REGIONAL OVERVIEW

Western Europe has very similar retail value sales of dog food and cat food

Western Europe underperforming the global growth rates

Following the stagnation in 2022, positive growth expected in the following years

Turkey records the most dynamic growth over the review period

Cat treats and mixers enjoy strong growth in Western Europe over 2019-2024

Cat food most dynamic over 2019-2024

Pet care sales generally remain resilient despite inflation pushing up prices

Demand for premium pet food remains strong despite tough economic climate

Pet shops and superstores remains the biggest distribution channel...

...but e-commerce continues gaining share in pet care

Consolidation in the pet shops and superstores channel in Spain

## LEADING COMPANIES AND BRANDS

Private label accounts for a fifth of Western European pet care sales

Mars sees a dip in its UK share after a pricing dispute with retailer Tesco

Most of the top 10 players have a presence in a number of countries across Western Europe

Mars and Nestlé lines continue to dominate the regional top 10 brands

## FORECAST PROJECTIONS

Positive but slowing growth expected over the forecast period

Premiumisation and pet humanisation likely to continue shaping pet care trends

## COUNTRY SNAPSHOTS

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Austria: Competitive and Retail Landscape

Belgium: Market Context

Belgium: Competitive and Retail Landscape

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