

Pet Care in Belgium

April 2024

Table of Contents

Pet Care in Belgium

EXECUTIVE SUMMARY

Pet care in 2024: The big picture

2024 key trends

Competitive landscape

Retailing developments

What next for pet care?

MARKET INDICATORS

Table 1 - Pet Populations 2019-2024

MARKET DATA

- Table 2 Sales of Pet Food by Category: Volume 2019-2024
- Table 3 Sales of Pet Care by Category: Value 2019-2024
- Table 4 Sales of Pet Food by Category: % Volume Growth 2019-2024
- Table 5 Sales of Pet Care by Category: % Value Growth 2019-2024
- Table 6 NBO Company Shares of Pet Food: % Value 2019-2023
- Table 7 LBN Brand Shares of Pet Food: % Value 2020-2023
- Table 8 NBO Company Shares of Dog and Cat Food: % Value 2019-2023
- Table 9 LBN Brand Shares of Dog and Cat Food: % Value 2020-2023
- Table 10 Penetration of Private Label in Pet Care by Category: % Value 2019-2024
- Table 11 Distribution of Pet Care by Format: % Value 2019-2024
- Table 12 Distribution of Pet Care by Format and Category: % Value 2024
- Table 13 Distribution of Dog and Cat Food by Format: % Value 2019-2024
- Table 14 Distribution of Dog and Cat Food by Format and Category: % Value 2024
- Table 15 Forecast Sales of Pet Food by Category: Volume 2024-2029
- Table 16 Forecast Sales of Pet Care by Category: Value 2024-2029
- Table 17 Forecast Sales of Pet Food by Category: % Volume Growth 2024-2029
- Table 18 Forecast Sales of Pet Care by Category: % Value Growth 2024-2029

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Cat Food in Belgium

KEY DATA FINDINGS

2024 DEVELOPMENTS

Growth in sales of cat food stimulated by increase in cat population as well as humanisation and premiumisation trends

Cat treats and mixers are bought to deepen owner/cat relationship

Mars and Nestlé characterise cat food holding over half of category value share

PROSPECTS AND OPPORTUNITIES

Insect-based Bazoef brand available for cats over the forecast period

Raw, fresh and natural ingredients benefit from growing demand

Supermarkets remains the leading channel, although pet shops and superstores, especially outlets with a retail e-commerce arm, is gaining ground

CATEGORY INDICATORS

Table 19 - Cat Owning Households: % Analysis 2019-2024

Table 20 - Cat Population 2019-2024

Table 21 - Consumption of Cat Food by Prepared vs Non-prepared: % Analysis 2019-2024

CATEGORY DATA

- Summary 2 Cat Food by Price Band 2024
- Table 22 Sales of Cat Food by Category: Volume 2019-2024
- Table 23 Sales of Cat Food by Category: Value 2019-2024
- Table 24 Sales of Cat Food by Category: % Volume Growth 2019-2024
- Table 25 Sales of Cat Food by Category: % Value Growth 2019-2024
- Table 26 Sales of Dry Cat Food by Life-Cycle: % Value 2019-2024
- Table 27 Sales of Wet Cat Food by Life-Cycle: % Value 2019-2024
- Table 28 NBO Company Shares of Cat Food: % Value 2019-2023
- Table 29 LBN Brand Shares of Cat Food: % Value 2020-2023
- Table 30 LBN Brand Shares of Cat Treats and Mixers: % Value 2020-2023
- Table 31 Distribution of Cat Food by Format: % Value 2019-2024
- Table 32 Forecast Sales of Cat Food by Category: Volume 2024-2029
- Table 33 Forecast Sales of Cat Food by Category: Value 2024-2029
- Table 34 Forecast Sales of Cat Food by Category: % Volume Growth 2024-2029
- Table 35 Forecast Sales of Cat Food by Category: % Value Growth 2024-2029

Dog Food in Belgium

KEY DATA FINDINGS

2024 DEVELOPMENTS

Despite inflation, premiumisation and pet humanisation continue to bolster dog food sales

Raw, fresh frozen foods become increasingly popular for their nutritional benefits and wider distribution via pet superstores Growing price polarisation leads to a squeeze in mid-priced dog food sales

PROSPECTS AND OPPORTUNITIES

Ongoing humanisation and premiumisation trends stimulated by young couples with no children

Decline in organic dog food offset by growing demand for sustainability boosting "clean", "locally produced" and "natural" dog food

CATEGORY INDICATORS

- Table 36 Dog Owning Households: % Analysis 2019-2024
- Table 37 Dog Population 2019-2024
- Table 38 Consumption of Dog Food by Prepared vs Non-prepared: % Analysis 2019-2024

CATEGORY DATA

- Summary 3 Dog Food by Price Band 2024
- Table 39 Sales of Dog Food by Category: Volume 2019-2024
- Table 40 Sales of Dog Food by Category: Value 2019-2024
- Table 41 Sales of Dog Food by Category: % Volume Growth 2019-2024
- Table 42 Sales of Dog Food by Category: % Value Growth 2019-2024
- Table 43 Sales of Dry Dog Food by Life-Cycle: % Value 2019-2024
- Table 44 Sales of Wet Dog Food by Life-Cycle: % Value 2019-2024
- Table 45 NBO Company Shares of Dog Food: % Value 2019-2023
- Table 46 LBN Brand Shares of Dog Food: % Value 2020-2023
- Table 47 LBN Brand Shares of Dog Treats and Mixers: % Value 2020-2023
- Table 48 Distribution of Dog Food by Format: % Value 2019-2024
- Table 49 Forecast Sales of Dog Food by Category: Volume 2024-2029
- Table 50 Forecast Sales of Dog Food by Category: Value 2024-2029
- Table 51 Forecast Sales of Dog Food by Category: % Volume Growth 2024-2029
- Table 52 Forecast Sales of Dog Food by Category: % Value Growth 2024-2029

Other Pet Food in Belgium

KEY DATA FINDINGS

2024 DEVELOPMENTS

Falling populations of reptiles, birds and fish dampen value sales growth in 2024

Inflation drives prices up as does the pet humanisation trend

Sales of live animals banned in the town of Liege indicating a change in animal welfare approach in Belgium

PROSPECTS AND OPPORTUNITIES

Expansion of pet shops and superstores boosts availability and product range of other pet food over the forecast period

While exerting less influence than in dog and cat food, humanisation and premiumisation trends are also present in other pet food, especially small mammal/reptile food

Bird food, especially food for wild birds, is a growth industry

CATEGORY INDICATORS

Table 53 - Other Pet Population 2019-2024

CATEGORY DATA

Table 54 - Sales of Other Pet Food by Category: Volume 2019-2024

Table 55 - Sales of Other Pet Food by Category: Value 2019-2024

Table 56 - Sales of Other Pet Food by Category: % Volume Growth 2019-2024

Table 57 - Sales of Other Pet Food by Category: % Value Growth 2019-2024

Table 58 - LBN Brand Shares of Bird Food: % Value 2020-2023

Table 59 - LBN Brand Shares of Fish Food: % Value 2020-2023

Table 60 - LBN Brand Shares of Small Mammal/Reptile Food: % Value 2020-2023

Table 61 - Distribution of Other Pet Food by Format: % Value 2019-2024

Table 62 - Forecast Sales of Other Pet Food by Category: Volume 2024-2029

Table 63 - Forecast Sales of Other Pet Food by Category: Value 2024-2029

Table 64 - Forecast Sales of Other Pet Food by Category: % Volume Growth 2024-2029

Table 65 - Forecast Sales of Other Pet Food by Category: % Value Growth 2024-2029

Pet Products in Belgium

KEY DATA FINDINGS

2024 DEVELOPMENTS

Inflationary growth in value sales in 2024 as consumers eschew this category for essentials such as pet food

Increase in cat population stimulates sales of cat litter

Stimulating dog accessories benefit from growing popularity as dogs struggle with being left home alone after the pandemic

PROSPECTS AND OPPORTUNITIES

Wider availability of pet insurance via Tom & Co

Growth in electronic accessories for dogs boosted by the entry of lower cost private label products

Growth in more nutritionally sophisticated pet food negates demand for pet healthcare, while hygiene and beauty products remains popular for dogs

CATEGORY DATA

Table 66 - Sales of Pet Products by Category: Value 2019-2024

Table 67 - Sales of Pet Products by Category: % Value Growth 2019-2024

Table 68 - Sales of Pet Healthcare by Type: % Value 2019-2024

Table 69 - Sales of Other Pet Products by Type: % Value 2019-2024

Table 70 - NBO Company Shares of Pet Products: % Value 2019-2023

Table 71 - LBN Brand Shares of Pet Products: % Value 2020-2023

Table 72 - Distribution of Pet Products by Format: % Value 2019-2024

Table 73 - Forecast Sales of Pet Products by Category: Value 2024-2029

Table 74 - Forecast Sales of Pet Products by Category: % Value Growth 2024-2029

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- Strategy Briefings: Global or regional in scope, and focusing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- Company Profiles: Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- Country Reports: For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/pet-care-in-belgium/report.