

Pet Care in Sweden

April 2024

Table of Contents

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

KEY DATA FINDINGS

2024 DEVELOPMENTS

Retail volume growth slows as cat ownership stabilises in the country
The humanisation trend aids sales of cat treats, with owners seeking healthy options
Owners increasingly reach for local brands, having high levels of trust in domestic goods

PROSPECTS AND OPPORTUNITIES

Stable growth in cat food sales as owners increasingly focus on optimal nutrition
Sustainability shapes product innovation in cat food for the coming years
Raw cat food continues to expand, as owners choose diets that drive health and wellbeing

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 Sweden

KEY DATA FINDINGS

2024 DEVELOPMENTS

- The rising humanisation trend drives sales of dog treats and mixers
- Sustainability and local origin shapes product innovation in dog food
- Raw dog food gains ground, as owners look at food choices with health benefits

PROSPECTS AND OPPORTUNITIES

- The subscription model is set to grow, adding convenience to everyday life
- Alternative options, including insect-based goods, is set to gain ground
- Heightened budget consciousness shapes product choices in 2024

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 Sweden

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Rising prices and a shift to premium goods drives retail value growth
- Players focus on innovations that offer natural treats to small mammals
- E-commerce rises as owners appreciate the wider range of options available

PROSPECTS AND OPPORTUNITIES

- Opportunity for private label to grow as players focus on affordable quality
- The humanisation trend is set to rise, shaping product innovation in other pet food
- Sustainability remains a key point of development in other pet food

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 Sweden

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Other pet products and pet health care drive retail value growth
- Owners look to spoil their pets, leading grocery stores to focus on impulse purchases
- Private label holds a strong position in cat litter, offering an appealing price quality ratio

PROSPECTS AND OPPORTUNITIES

- Pet owners invest in pet healthcare while the landscape focuses on innovation
- Opportunity for private label to expand as consumers focus on cost savings
- Sustainable pet products grow in popularity across the forecast period

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

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 focussing 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-sweden/report.