

Pet Care in Germany

November 2023

Table of Contents

Pet Care in Germany

EXECUTIVE SUMMARY

Pet care in 2023: The big picture

2023 key trends

Competitive landscape

Retailing developments

What next for pet care?

MARKET INDICATORS

Table 1 - Pet Populations 2018-2023

MARKET DATA

- Table 2 Sales of Pet Food by Category: Volume 2018-2023
- Table 3 Sales of Pet Care by Category: Value 2018-2023
- Table 4 Sales of Pet Food by Category: % Volume Growth 2018-2023
- Table 5 Sales of Pet Care by Category: % Value Growth 2018-2023
- Table 6 NBO Company Shares of Pet Food: % Value 2018-2022
- Table 7 LBN Brand Shares of Pet Food: % Value 2019-2022
- Table 8 NBO Company Shares of Dog and Cat Food: % Value 2018-2022
- Table 9 LBN Brand Shares of Dog and Cat Food: % Value 2019-2022
- Table 10 Penetration of Private Label in Pet Care by Category: % Value 2018-2023
- Table 11 Distribution of Pet Care by Format: % Value 2018-2023
- Table 12 Distribution of Pet Care by Format and Category: % Value 2023
- Table 13 Distribution of Dog and Cat Food by Format: % Value 2018-2023
- Table 14 Distribution of Dog and Cat Food by Format and Category: % Value 2023
- Table 15 Forecast Sales of Pet Food by Category: Volume 2023-2028
- Table 16 Forecast Sales of Pet Care by Category: Value 2023-2028
- Table 17 Forecast Sales of Pet Food by Category: % Volume Growth 2023-2028
- Table 18 Forecast Sales of Pet Care by Category: % Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Cat Food in Germany

KEY DATA FINDINGS

2023 DEVELOPMENTS

Inflation and increasing cost of raw materials drive up price of cat food

Premiumisation drops due to consumers budgeting and choosing cheaper options

Wet food continues to outperform dry food across price segments

PROSPECTS AND OPPORTUNITIES

Enriched cat food will continue to develop due to owners prioritising their cats' health

Cat treats and mixers to develop further over the forecast period

Sustainability will remain relevant for several aspects of the industry

CATEGORY INDICATORS

Table 19 - Cat Owning Households: % Analysis 2018-2023

Table 20 - Cat Population 2018-2023

Table 21 - Consumption of Cat Food by Prepared vs Non-prepared: % Analysis 2018-2023

CATEGORY DATA

- Summary 2 Cat Food by Price Band 2023
- Table 22 Sales of Cat Food by Category: Volume 2018-2023
- Table 23 Sales of Cat Food by Category: Value 2018-2023
- Table 24 Sales of Cat Food by Category: % Volume Growth 2018-2023
- Table 25 Sales of Cat Food by Category: % Value Growth 2018-2023
- Table 26 Sales of Dry Cat Food by Life-Cycle: % Value 2018-2023
- Table 27 Sales of Wet Cat Food by Life-Cycle: % Value 2018-2023
- Table 28 NBO Company Shares of Cat Food: % Value 2018-2022
- Table 29 LBN Brand Shares of Cat Food: % Value 2019-2022
- Table 30 LBN Brand Shares of Cat Treats and Mixers: % Value 2019-2022
- Table 31 Distribution of Cat Food by Format: % Value 2018-2023
- Table 32 Forecast Sales of Cat Food by Category: Volume 2023-2028
- Table 33 Forecast Sales of Cat Food by Category: Value 2023-2028
- Table 34 Forecast Sales of Cat Food by Category: % Volume Growth 2023-2028
- Table 35 Forecast Sales of Cat Food by Category: % Value Growth 2023-2028

Dog Food in Germany

KEY DATA FINDINGS

2023 DEVELOPMENTS

Dynamics between price segments change due to inflation

Private label dog food benefits from inflationary pressures

Raw food and frozen meat gains relevance across retailers

PROSPECTS AND OPPORTUNITIES

Dog food subscription services expected to attract more consumers in the future Alternative protein sources such as plant-based or insect-derived set to further grow Innovation in snacks will continue to develop to offer variety

CATEGORY INDICATORS

- Table 36 Dog Owning Households: % Analysis 2018-2023
- Table 37 Dog Population 2018-2023
- Table 38 Consumption of Dog Food by Prepared vs Non-prepared: % Analysis 2018-2023

CATEGORY DATA

- Summary 3 Dog Food by Price Band 2023
- Table 39 Sales of Dog Food by Category: Volume 2018-2023
- Table 40 Sales of Dog Food by Category: Value 2018-2023
- Table 41 Sales of Dog Food by Category: % Volume Growth 2018-2023
- Table 42 Sales of Dog Food by Category: % Value Growth 2018-2023
- Table 43 Sales of Dry Dog Food by Life-Cycle: % Value 2018-2023
- Table 44 Sales of Wet Dog Food by Life-Cycle: % Value 2018-2023
- Table 45 NBO Company Shares of Dog Food: % Value 2018-2022
- Table 46 LBN Brand Shares of Dog Food: % Value 2019-2022
- Table 47 LBN Brand Shares of Dog Treats and Mixers: % Value 2019-2022
- Table 48 Distribution of Dog Food by Format: % Value 2018-2023
- Table 49 Forecast Sales of Dog Food by Category: Volume 2023-2028
- Table 50 Forecast Sales of Dog Food by Category: Value 2023-2028
- Table 51 Forecast Sales of Dog Food by Category: % Volume Growth 2023-2028
- Table 52 Forecast Sales of Dog Food by Category: % Value Growth 2023-2028

Other Pet Food in Germany

KEY DATA FINDINGS

2023 DEVELOPMENTS

Declining interest in aguariums depresses volume growth of fish food

Birds remain niche pet option despite upturn during pandemic

Small mammal population stagnates but ownership remains an option where dogs and cats are too expensive

PROSPECTS AND OPPORTUNITIES

Addressing niche consumers likely to be strategy for players to grow

Enriched options will drive growth of food targeting fish, small mammals and birds

Population development will dictate the future of the category

CATEGORY INDICATORS

Table 53 - Other Pet Population 2018-2023

CATEGORY DATA

Table 54 - Sales of Other Pet Food by Category: Volume 2018-2023

Table 55 - Sales of Other Pet Food by Category: Value 2018-2023

Table 56 - Sales of Other Pet Food by Category: % Volume Growth 2018-2023

Table 57 - Sales of Other Pet Food by Category: % Value Growth 2018-2023

Table 58 - LBN Brand Shares of Bird Food: % Value 2019-2022

Table 59 - LBN Brand Shares of Fish Food: % Value 2019-2022

Table 60 - LBN Brand Shares of Small Mammal/Reptile Food: % Value 2019-2022

Table 61 - Distribution of Other Pet Food by Format: % Value 2018-2023

Table 62 - Forecast Sales of Other Pet Food by Category: Volume 2023-2028

Table 63 - Forecast Sales of Other Pet Food by Category: Value 2023-2028

Table 64 - Forecast Sales of Other Pet Food by Category: % Volume Growth 2023-2028

Table 65 - Forecast Sales of Other Pet Food by Category: % Value Growth 2023-2028

Pet Products in Germany

KEY DATA FINDINGS

2023 DEVELOPMENTS

Technology and connectivity remain major trend for pet products

Subdued growth for non-essential pet dietary supplements as pet owners look to control their budgets

Consumers tend to choose more affordable options via e-commerce

PROSPECTS AND OPPORTUNITIES

Product development will resume only after price sensitivity wanes

Personalisation to play larger role across pet products

Sustainability to be increasingly taken into account by both consumers and players

CATEGORY DATA

Table 66 - Sales of Pet Products by Category: Value 2018-2023

Table 67 - Sales of Pet Products by Category: % Value Growth 2018-2023

Table 68 - Sales of Pet Healthcare by Type: % Value 2018-2023

Table 69 - Sales of Other Pet Products by Type: % Value 2018-2023

Table 70 - NBO Company Shares of Pet Products: % Value 2018-2022

Table 71 - LBN Brand Shares of Pet Products: % Value 2019-2022

Table 72 - Distribution of Pet Products by Format: % Value 2018-2023

Table 73 - Forecast Sales of Pet Products by Category: Value 2023-2028

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-germany/report.