Pet Care in Latin America

August 2023

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INTRODUCTION

Scope

Key findings

REGIONAL OVERVIEW

Dry dog food the dominant product area in Latin American pet care

Latin America is recording above-average growth in its pet care sales

Annual growth settles back down again at around 5% after the pandemic's demand spike

Generally larger dog than cat populations in Latin American countries

Cat food more dynamic but dog food adds more new sales over 2018-2023

Dry dog and cat food sales still much greater than wet dog and cat food in Latin America

Popularity of therapeutic pet food could limit sales of dietary supplements in Brazil

Consumers' disposable incomes under pressure as inflation bites in Latin America

Pet shops and superstores the biggest pet care distribution channel

E-commerce continues growing but has a relatively small sales share in pet care

Veterinary clinics an important channel in Argentina

LEADING COMPANIES AND BRANDS

High levels of concentration across regional pet care markets

Mars and Nestlé lead but Grandfood Industria e Comercio is most dynamic in 2017-2022

Brazil the main revenue generator for most of the top 10 players in Latin America

Mars and Nestlé lines dominate the regional top 10 brands in Latin America

FORECAST PROJECTIONS

Continued growth expected throughout the forecast period

Dry food will continue to dominate but treats and wet food will be more dynamic

Players ensuring that claims like "high in protein" are clearly visible on product packaging

COUNTRY SNAPSHOTS

Argentina: Market Context

Argentina: Competitive and Retail Landscape

Brazil: Market Context

Brazil: Competitive and Retail Landscape

Chile: Market Context

Chile: Competitive and Retail Landscape

Colombia: Market Context

Colombia: Competitive and Retail Landscape

Mexico: Market Context

Mexico: Competitive and Retail Landscape

Peru: Market Context

Peru: Competitive and Retail Landscape

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-latin-america/report.