

# Pet Care in Western Europe

August 2023

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Scope

Key findings

## REGIONAL OVERVIEW

Dog food and cat food very close to each other in value sales terms

Western Europe, the second biggest regional pet care market, is seeing slow growth

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

UK pet care sales declining in 2023, but Turkey continues to record dynamic growth

Pet products add a lot of new sales in Germany and France over 2018-2023

Dog food, cat food and pet products all add similar levels of new sales in 2018-2023

Pet care sales generally remain resilient despite inflation impacting disposable incomes...

... with continued remote working seeing owners still spending more time with their pets

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

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

Bauhaus introduces pet sections to its stores 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 in 2022 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

Steady growth expected throughout the forecast period

Premiumisation and pet humanisation likely to continue shaping pet care trends

## COUNTRY SNAPSHOTS

Austria: Market Context

Austria: Competitive and Retail Landscape

Belgium: Market Context

Belgium: Competitive and Retail Landscape

Denmark: Market Context

Denmark: Competitive and Retail Landscape

Finland: Market Context

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Portugal: Competitive and Retail Landscape

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Spain: Competitive and Retail Landscape  
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