

## **Germany Pet Food Market - Growth, Trends, and Forecasts (2023 - 2028)**

Market Report | 2023-01-23 | 80 pages | Mordor Intelligence

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### **Report description:**

The German pet food market is projected to register a CAGR of 4.6% over the forecast period.

The increasing popularity of cat ownership in the country enhances the practice of purchasing food items from supermarkets/hypermarkets, online channels, and many other distribution channels, particularly in Germany.

According to USDA, in 2021, Germany was the largest economy in the European Union, with 47.0% of German households owning a pet and 15.0% owning more than one pet. According to the Industrial Association of Pet Care Producers, Germany is a leading market for pet food products, with 83.0 million of the world's wealthiest consumers and 39.4 million pets. According to the Industrieverband Heimtierbedarf (IVH), sales accounted for USD 3.9 million in 2020, especially in the dog and cat food category.

The popularity of the internet is strengthening the pet food industry. According to estimates by Industrieverband Heimtierbedarf (IVH) e. the online sales volume in 2021 was approximately EUR 1,055 million (USD 1,194.7 million).

Government agencies, pet food manufacturers, and veterinarians play crucial roles in ensuring the safety of pet food and safeguarding pets and their owners. Recent legislation expects to increase the government's role in regulating cat food and may affect many manufacturers.

### Germany Pet Food Market Trends

#### Increasing Trend of Pet Humanization

Pet humanization is globally accepted in the pet industry because more dog and cat owners want to provide their pets with human-like products or experiences. They are often considered beloved companions that enhance their owners' well-being and quality of life. Animals are increasingly being recognized as family members, especially by older and single people. Pet owners are

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increasingly becoming concerned about their pets' health and weight. Thus, manufacturers target a growing percentage of consumers seeking high-quality pet food.

According to the Industrieverband Heimtierbedarf (IVH), in 2021, Germany stated 34.7 million pets (excluding fish and reptiles) domestically lived in the country, with which cats accounted for 26% of domestic pets followed by dogs at 21%, small animals with 5%, and pet birds by 3%.

Key aspects of the 'humanization' of pet food include providing specific nutrition, functional nutrition, a variety of 'gastronomic experiences,' and addressing safety and health concerns. There is an increasing demand for functional or natural pet food. As a result, with the focus on special diets and specific ingredients, the average unit price has been rising, especially in the premium and super-premium segments.

#### Cat Food Market is Dominating the German Pet Food Industry

According to an Industrieverband Heimtierbedarf (IVH) report, in 2021, the pet cat population accounted for 16.7 million, whereas the pet dog population accounted for 10.3 million. The German cat food market's turnover increased by 5.3% in 2020, accounting for a sales value of USD 1.90 billion. Mars, Fressnapf, and Nestle are the major players in Germany's cat food market, accounting for more than 60.0% of total cat food sales.

According to Industrieverband Heimtierbedarf (IVH), in terms of the wet food segment, cat food saw 2.2 times higher revenue than dog food, which accounted for USD 1,170 million in 2021. In the case of the cat food sales revenue in 2021, wet food accounted for 65.5%, dry food accounted for 18.2%, and treats and snacks accounted for 16.3% of the revenue. In contrast, in the dog food sales revenue in 2021, wet food accounted for 31.3%, dry food accounted for 28.6%, and treats and snacks accounted for 40.1% of the revenue. It is anticipated that the cat food market will perform better than dog food because the German population is aging, and cats are more accessible to take care of than dogs. Increased growth is seen in cat treats due to increased demand for functional and premium products. While wet cat food constitutes the majority of the overall cat food sales, many consumers in Germany are switching to mixed feeding by combining wet and dry food.

#### Germany Pet Food Market Competitor Analysis

The German pet food market is consolidated with major pet food companies like Deurerer, Heristo AG, Vitakraft-Werke Wuhrmann & Sohn, Fressnapf, Aldi, Rewe, Mars, and Nestle. Manufacturers are expanding product ranges by targeting specific breeds, sizes, and ages. Sales of therapeutic dog food have also increased. However, it remains a small niche product due to high prices. Premium dog food and treats are expected to be the primary drivers of future growth. Premium cat food will be a significant driver of overall cat food growth. However, sales of wet cat food will likely grow due to the rising popularity of private-label products.

The market studied is anticipated to be more consolidated in the forecast period as there is stiff competition among existing companies trying to introduce new marketing strategies. Prominent players are using mergers and acquisitions and product innovation as major strategic activities for a higher market share in the future.

Additional Benefits:

The market estimate (ME) sheet in Excel format  
3 months of analyst support

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