

Russia Pet Food Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

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Report description:

The Russian pet food market is projected to register a CAGR of 4.2% during the forecast period (2022-2027). The global COVID-19 pandemic has transformed the Russian pet food market by driving online sales and increasing the expansion opportunities for the local business. During the nationwide lockdown, pet stores were allowed to continue their operations, but their revenue decreased as consumers preferred to buy through online channels. Online sales have been increasing. Cat and dog food sales increased by 49% and 65% during the COVID-19 pandemic. Hence, the COVID-19 pandemic had a positive impact on the Russian pet food market. According to the European Pet Food Federation, the Russian pet food market occupied around 10.9% of the total European and 2.0% of the global pet food market in 2018. Russian pet food market is a young market compared to the Western European countries, and it is expected to witness growth due to the increased domestic production. According to the studies, in 2018, the demand for domestic pet food rose by around 20.0%, while the demand for imported pet food also increased by 40.0% during the forecast period. The majority of the market share of the pet food market belongs to dry and wet cat food. The market once was heavily dependent on foreign imports, especially from the United States. However, the scenario has significantly changed to promote domestic production with stringency in import licensing requirements, along with benefits and subsidies promoting domestic production.

Russia Pet Food Market Trends

Pet Humanization Driving the Market Growth

The trend of pet humanization continues to grow deeply in the pet food industry. Loneliness is considered the biggest social issue, affecting all parts of society and every age, and there is a significant body of research showing the powerful role pets can play in reducing the sense of isolation. Pet owners are treating their pets like members or a part of their family increasingly, whereby

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pets could provide companionship for their owners, especially dogs and cats. According to European Pet Food Federation, in Russia, 28% of the household owns either a cat or a dog. This suggests that the evolution of the category is becoming more premium, as consumers are prepared to spend more on pet food products that are healthy, nutritious, and improve living conditions. The problem of pet obesity is mainly caused by pet owners indulging their pets with treats and food, or some of the owners giving excessive food to their pets or feeding their pets with inappropriate human food. For instance, Mars, in 2019, updated its entire Whiskas pouch portfolio to highlight healthy ingredients on the pack design and launched an 11+ year range of pet products for older cats as research suggested that more than 18% of cats were over 11 years old. Most pet owners want the best ingredients in their pet's food, mirroring the trend of the human food industry due to the humanization of pets.

Import of Pet Food Dominates the Russian Pet Food Market in Terms of Value

According to the European Pet Food Federation, Russia's pet food market is the third fastest-growing market worldwide, with annual growth of 8.7%. Strong growth is expected to continue, as a result of the expanding pet population, changing feeding patterns, and increased sales in provincial cities. Accordingly, in 2020, the import of pet foods was valued at USD 387,912 thousand, up from USD 289,237 thousand in 2017, denoting a 34.1% increase in the value. In 2020, 158,110 tons of pet food were imported to Russia, an increase of 9.9% from 2019. As per the United States Department of Agriculture, the share of dry food for cats and dogs in total imports accounts for 57.0%, while 41.0% is accounted for by canned food, and 2.0% comes from other types of food. According to the International Trade Centre (ITC), France, Italy, Canada, and the Netherlands have consistently been the major exporters of pet foods into the Russian pet food market over the years. In 2020, France, Italy, and the Czech Republic accounted for 43% of total pet food imports in Russia. Imports of pet food continue to increase as a result of renewed economic growth, higher household incomes, an increase in the number of pets within Russian families, and higher demand for new flavors/types and premium products.

Russia Pet Food Market Competitor Analysis

The Russian pet food market is consolidated, with the top global players occupying a major share in the market. The competition in the market is driven by consumer loyalty. The major players in the pet food market include Mars Inc., Nestle Purina Petcare Company, Colgate-Palmolive Company (Hill's Pet Nutrition Inc.), The J.M. Smucker Company (Big Heart Pet Brands Inc.), and Blue Buffalo Pet Products Inc.

Additional Benefits:

The market estimate (ME) sheet in Excel format

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