

Brazil Pet Food - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2017 - 2029

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Report description:

The Brazil Pet Food Market size is estimated at USD 9.37 billion in 2024, and is expected to reach USD 17.10 billion by 2029, growing at a CAGR of 12.78% during the forecast period (2024-2029).

Dogs dominate the Brazil pet food market as they are highly owned pets in the country with a high consumption rate

- With the growing pet humanization trend, Brazil has emerged as one of the largest markets for pet food in South America. The country's pet population has witnessed a significant increase. The pet population reached 156.4 million in 2022 from 127.1 million in 2017. The increase in pet humanization has further helped in the growth of the pet food industry in Brazil, as pets are increasingly regarded as integral members of the family.

- Dogs have a major share in Brazil's pet food market, and the dogs segment accounted for 75.1% in 2022. This can be attributed to dogs having a significant share of the pet population, as they accounted for 38.2% in 2022. Furthermore, there is a growing trend toward premium dog food products in the region, and the dog food segment is projected to register a CAGR of 12.8% during the forecast period.

- In 2022, cats have the second-largest market share in the Brazilian pet food market, accounting for 17.0%. However, the share of cats is lower than dogs primarily due to their lower population. The number of pet cats in Brazil was less than 50% of the number of pet dogs in 2022. However, the pet cat population increased by about 29.4% between 2017 and 2022, indicating a faster growth rate compared to the 13.4% increase observed in the pet dog population during the same period. This growth reflects the rising popularity of pet cats in the country.

- The other animals include birds, small mammals, rodents, and others. These animals have unique nutritional requirements that need to be fulfilled through specialized pet food products. In 2022, the market for other animal pet food reached USD 588.3

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million.

- The increasing awareness among pet owners and the growing population of pets in the country are expected to drive the pet food market in the coming years.

Brazil Pet Food Market Trends

Growing adoption of cats as companions and increasing awareness of their benefits are driving the cat market in the country

- The population of pet cats in Brazil has been consistently growing, particularly between 2019 and 2022, witnessing a substantial increase of 21.0%. This growth can be primarily attributed to the higher adoption rates of cats as companions during prolonged home confinement experienced during the COVID-19 pandemic. Brazil has the highest cat population in South America, accounting for 55.5% of the total cat population in the region in 2022.
- The cat population accounted for 18.3% of the Brazilian pet population in 2022. This relatively small proportion of cats compared to dogs is attributed to the cultural perception in the country wherein dogs are seen as more practical and valued pets than cats. These factors have contributed to the dog population being more than double compared to the cat population. However, there is an increasing awareness among people about the benefits of having a cat in the country. Owing to these factors, around 14.4 million households in Brazil own at least one cat, amounting to 21.4% of households owning a pet in 2022, with average growth in felines of 2.5% over the last 10 years due to the need for companionship.
- To support the growing cat population, new cat cafes are being established in Brazil, and these cat cafes are functioning as animal shelters post-pandemic, thereby ensuring pet security within the country. In 2021, Gato Cafe was established, which helped in getting cats a secure shelter after the death of their pet parents during the pandemic. It has also encouraged potential parents to adopt these secured pets.
- Factors such as increasing pet humanization, rising awareness about the benefits of owning a cat, and the minimal expenses compared to owning dogs are anticipated to drive the pet cat population.

The growing premiumization trend and the rising number of pet-owning households in Brazil are increasing pet expenditure in the country

- Brazil holds a prominent position as one of the largest pet food markets, not only within South America but also globally. There is an increasing trend in overall pet food expenditure within the country, which grew by about 19.2% between 2019 and 2022. This surge in spending can be attributed to the rising number of pet-owning households in Brazil, which experienced a steady CAGR of 1.3% between 2016 and 2020. Pet owners in the country are increasingly focused on pet humanization, driving demand for natural ingredients and premium products. For instance, the retail sales value of premium dry dog food in Brazil saw a rise from USD 335.7 million in 2016 to USD 761.1 million in 2022, with a CAGR of 14.7%, reflecting the escalating demand for premium pet products.
- The expenditure on pet cats increased by about 22.8% between 2019 and 2022, followed by dogs with a 20.7% increase, whereas for other pet animals, it increased by about 8.4%. Among South American countries, Brazil has the highest pet expenditure per animal, amounting to about USD 455.8 in 2022, which was 6.4% greater than the pet expenditure per animal in

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Argentina. The higher pet expenditure in Brazil is majorly due to various factors, such as increased pet food premiumization and a rising number of pet owners with higher incomes.

- In 2022, most people in Brazil preferred to buy pet food in stores, which accounted for 88.9% of all pet food distribution. However, due to the COVID-19 pandemic and increasing awareness regarding online shopping, e-commerce has become more popular for pet food purchases. The higher consumption of premium pet food and growing awareness about the benefits of healthy, nutritious pet food have helped in increasing pet expenditure within the country.

Brazil Pet Food Industry Overview

The Brazil Pet Food Market is fragmented, with the top five companies occupying 29.94%. The major players in this market are ADM, BRF Global, Mars Incorporated, Nestle (Purina) and Premierpet (sorted alphabetically).

Additional Benefits:

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

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