

Europe Cat Food - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2017 - 2029

Market Report | 2023-12-01 | 308 pages | Mordor Intelligence

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Report description:

The Europe Cat Food Market size is estimated at USD 22.36 billion in 2024, and is expected to reach USD 30.66 billion by 2029, growing at a CAGR of 6.52% during the forecast period (2024-2029).

The food segment dominates the European market due to the rising cat adoptions in the United Kingdom, France, and Germany

- Europe is one of the largest regions with a high cat population and a high usage of commercial cat food products, increasing its importance in the global cat food market. In 2022, the European cat food market accounted for USD 19.4 billion. The market grew by 22.5% between 2017 and 2021 during the historical period, which is associated with the increase in the usage of premium products due to the rising pet humanization in the region, including looking after pets and considering them as an integral part of the family.

- In the European cat food market, food and treats were the major segments, accounting for market values of USD 14.3 billion and USD 2.6 billion in 2022, respectively. The higher shares of these segments were because of their significance in providing regular dietary requirements for cats and for training and entertainment purposes.

- Cats consume less water and need to be compensated with a wet food diet. As wet food is rich in moisture content, the usage of wet food among people who own cats has increased. Therefore, wet cat food emerged as the major pet food type in the European cat food market, accounting for 53.3% of the cat food segment in 2022, and it is estimated to record a CAGR of 5.7% during the forecast period.

- Nutraceuticals and pet treats are also expected to grow faster in the European cat food market, with CAGRs of 7.4% and 7.1%, respectively, during the forecast period. Cats are frequent eaters, and pet parents incorporate treats into feeding routines. The rising pet health concerns are also driving the usage of nutraceuticals.

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- Therefore, the rising cat adoption and the increasing usage of commercial pet food products are estimated to drive the European cat food market at a CAGR of 5.7% during the forecast period.

Germany dominates the European cat food market owing to its large cat population and consumers' higher expenditure on pets

- Europe is one of the largest cat food markets globally, amounting to USD 19.4 billion in 2022, owing to pet owners making them a part of the family. The European cat food market increased by 22.5% between 2017 and 2021, which is associated with the increasing usage of commercial cat food products and the growing premiumization in the region.

- In Europe, Germany was the largest country in the cat food market, amounting to a value of USD 3.17 billion in 2022. The higher market share held by the country is because of the slightly higher cat population along with the higher expenditure of cat owners on cat food. For instance, the cat population in the country accounted for 14.9% of the region's cat population in 2022.

- France and the United Kingdom are the major countries in the European cat food market, with values of USD 2.79 billion and USD 2.55 billion, respectively, in 2022. Consumers in these countries, which have a higher cat population compared to other regional countries, are increasing their usage of premium food products. The long and harsh winters are driving cat adoption in Poland and Russia, which are also major countries concerning the cat population. The cat food market in these countries is estimated to record CAGRs of 11.9% and 11.6%, respectively, during the forecast period.

- While supermarkets and hypermarkets and specialty stores are the major distribution channels in the European cat food market, the penetration of e-commerce platforms and the shift in specialty stores to omnichannel services are estimated to drive online channels to register a CAGR of 6.5% during the forecast period.

- Therefore, the increase in cat adoption and the increase in premiumization are projected to drive the European cat food market at a CAGR of 5.7% during the forecast period.

Europe Cat Food Market Trends

Cats are the major companion animals adopted in Europe as they are a symbol of good luck and adapt easily to small spaces

- In Europe, cats are the major pets adopted by pet parents, accounting for 36.4% of the total pet population in 2022. The high adoption of cats is mainly due to their adaptability to smaller living spaces, as they can be kept indoors without feeling cooped up.

Also, in some European countries, including the United Kingdom, Germany, and Russia, cats are symbols of good luck and fortune.

- Owning pets creates a sense of companionship, affection, protection, and unique bonds with the owners. Therefore, 90 million households in the European Union had pets in 2021, representing 46% of the households. The European cat population has been steadily increasing over the years, which increased by 14.9% during 2017-2022. Moreover, the higher adoption of cats as pets after the COVID-19 pandemic was mainly attributed to the increase in pet humanization, stimulated by loneliness, remote work, and helping prevent illness and allergies. From 2020 to 2022, the cat population increased by 7.1%.

- In Europe, Russia consists of a large cat population, accounting for 19.6% of the total population in the region in 2022, followed by Germany (14.8%), France (13.2%), and the United Kingdom (11.1%). There is a cultural affinity for cats in Russia, with many Russian literary works featuring cats as important characters, and they are considered good luck in Russian folklore. European shorthair, Chartreux, Russian Blue, and Siberian are among the major cat breeds adopted in Russia and the region.

- The adoption of harmonized rules for traveling with pets, growing online sales of cats, relatively lower maintenance, and urban living are some of the major factors that drive the cat population and, thereby, the pet food market in the region.

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The easy availability of e-commerce platforms and the growing consumption of private-label food brands are contributing to an increase in pet cat expenditure

- There was an increase in pet expenditure in Europe during the study period because of growing spending on different types of food and rising premiumization as pet parents are concerned about the health needs of their pets. These factors helped in increasing the pet expenditure per animal by 24% between 2017 and 2022. For instance, in 2022, pedigree cats gained popularity, with the number of Persian cats increasing three times and the number of pedigree cats growing by more than 20% since 2017. Although the cat population is higher than that of dogs in Europe, they consume less pet food than dogs.
- Pet parents are providing premium brand products to their pet cats. Due to the increasing humanization of pets and rising disposable incomes, pet parents tend to opt for food brands such as Royal Canin, Purina, and Whiskas for their cats. The medium-priced pet food segment is witnessing increased sales due to the similar nutritional values offered by premium products. Low-income pet parents have been purchasing private-label brands for cats as they are low-priced compared to premium brands.
- Since the COVID-19 pandemic, there has been an increase in pet food sales through online channels as companies such as Bewital partnered with Zooplus and the convenience of a higher number of products available on e-commerce websites. This helped Amazon to be a leader in pet food sales in the United Kingdom, and online pet care sales in Europe are expected to register an annual growth rate of 5-9%. The rising consumption of private-label food brands and growing awareness about the benefits of healthy, nutritious pet food helped in increasing pet expenditure in the region.

Europe Cat Food Industry Overview

The Europe Cat Food Market is fragmented, with the top five companies occupying 22.76%. The major players in this market are ADM, Affinity Petcare SA, Colgate-Palmolive Company (Hill's Pet Nutrition Inc.), Mars Incorporated and Nestle (Purina) (sorted alphabetically).

Additional Benefits:

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

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