

Europe Pet Diet - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2017 - 2029

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Report description:

The Europe Pet Diet Market size is estimated at USD 5.47 billion in 2024, and is expected to reach USD 8.13 billion by 2029, growing at a CAGR of 8.25% during the forecast period (2024-2029).

Dogs hold the largest share among pet animals, dominating the market due to the higher expenditure on them compared to other pet animals

- Veterinary diets are specialized pet food products developed to address specific health conditions in pets. In the European market, pet veterinary diets experienced a significant surge of 25.4% between 2017 and 2021. This growth could be attributed to advancements in pet nutrition science and research, leading to the innovation of more specialized diets capable of addressing a broader range of health issues in pets. Therefore, pet veterinary diets accounted for 9.6% of the European pet food market in 2022.

- Among animals in Europe, dogs dominated the market, accounting for 44.1% in 2022. This domination could be attributed to their large population in the region, accounting for 29.9% of the European pet population in the same year.

- Cats held a share of 36.3% of the pet population in 2022. Despite the larger pet cat population, they accounted for 41.9% of the market, relatively less compared to dogs. This difference could be attributed to greater dog humanization compared to cats in the region. Also, the average pet expenditure per dog was USD 4.9 thousand, whereas, for cats, it was USD 4.4 thousand in 2022. This resulted in a larger market share for dogs despite their smaller population compared to cats.

- Other pet animals accounted for 13.9% of the market value in 2022. There is potential for other pet animals in terms of veterinary diets, evidenced by the fact that these animals accounted for 33.8% of the pet population in 2022.

- The rising pet humanization and increasing incidence of diseases are anticipated to drive the European pet veterinary diet

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market during the forecast period.

The United Kingdom and Germany held the largest market share in the European pet veterinary diet market due to their high pet populations compared to other countries

- Pet veterinary diets play a vital role in treating specific diseases and infections in pets. They are used for both preventive and curative purposes. With the increasing awareness of pet health and well-being, veterinary diets have gained significant importance in the pet food market across the region. In 2022, veterinary diets accounted for 9.5% of the European pet food market.
- Between 2017 and 2022, the market experienced a steady growth of 44.6%, attributed to factors such as the rising pet adoption during the pandemic and the availability of a wider range of dietary options to meet pets' specific needs.
- Among European countries, the United Kingdom and Germany held the largest market shares in veterinary diets for pets, with market values of USD 750.3 million and USD 675.1 million, respectively, in 2022. This dominance in the regional market can be due to their high pet populations compared to other countries, well-established manufacturing facilities, and the growing trend of premiumization.
- Poland and Russia are expected to register the fastest growth, with CAGRs of 11.0% and 10.3%, respectively, during the forecast period due to the increasing penetration of these diets and the growing pet population in these countries.
- The availability of a diverse range of veterinary diets specifically formulated to address various pet infections and the pet owners' willingness to invest more in enhancing the health of their pets are the factors that are expected to drive the growth of the veterinary diet segment in Europe. The segment is anticipated to register a CAGR of 7% during the forecast period.

Europe Pet Diet Market Trends

Cats are the major companion animals adopted in Europe due to their adaptability to small spaces and because they are regarded as a symbol of good luck

- In Europe, cats are the major pets adopted by pet parents; they accounted 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; they can be kept indoors without feeling cooped up. Also, in some European countries, including the United Kingdom, Germany, and Russia, cats are considered to be symbols of good luck or fortune.
- Owning pets creates a sense of companionship, affection, and protection, developing unique bonds between the owners and their pets. In 2021, 90 million households in the European Union had pets, which represented 46% of the total number of households. Also, the European cat population has been steadily increasing over the years, increasing by 14.9% from 2017 to 2022. The higher adoption of cats as pets after the COVID-19 pandemic is mainly attributed to the increase in pet humanization stimulated by loneliness and remote work. From 2020 to 2022, the cat population increased by 7.1%.
- In Europe, Russia consists of a large cat population, which accounted for 19.6% of the total population in the region, 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. Cats are considered as a sign of good luck in Russian folklore. European shorthair, Chartreux, Russian Blue, and Siberian are among the major cat breeds adopted in Russia and Europe in general.
- The adoption of harmonized rules for traveling with pets, growing online sales of cat products, relatively lower maintenance, and urban living are some of the major factors expected to drive the cat population, boosting the market's growth in the region.

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The growing premiumization, increasing pet humanization, and rising disposable incomes are driving pet expenditure in Europe

- Pet expenditure in Europe increased during the study period because of increased spending on different types of food and the growing trend of premiumization, with pet parents becoming more concerned about the health needs of their pets. These factors boosted the pet expenditure per animal by 25% between 2017 and 2022. In 2022, dogs held the largest share, accounting for 37.8%, as dogs are fed specialized pet food and have a higher consumption of pet food than cats. For instance, in the United Kingdom, people's average pet food expense was USD 330 in 2022, which was more than a cat's food expense of USD 150. Dogs are also provided with services such as pet grooming and training for socialization with other dogs.

- Pet parents provide premium products to their pets, such as cats and dogs. Pet parents prefer to feed their pets food from brands such as Royal Canin, Purina, and Whiskas because of the growing pet humanization and an increase in disposable income. There is also a rise in purchases from the medium-priced segment of pet food due to improvements in the pet food nutrition offered by these medium-priced products.

- During the COVID-19 pandemic, there was an increase in the sales of pet food through online channels, as the majority of supermarkets had fewer product offerings due to the lockdowns. Also, e-commerce websites have a higher number of products available. It helped Amazon to be a leader in pet food sales in the United Kingdom, with the website receiving more than 579 million visits annually since the pandemic. The higher consumption of premium pet food and growing awareness about the benefits of healthy, nutritious pet food helped increase pet expenditure in the region.

Europe Pet Diet Industry Overview

The Europe Pet Diet Market is fragmented, with the top five companies occupying 31.23%. The major players in this market are Affinity Petcare SA, Colgate-Palmolive Company (Hill's Pet Nutrition Inc.), Mars Incorporated, Nestle (Purina) and Virbac (sorted alphabetically).

Additional Benefits:

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

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