

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

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Report description:

The Europe Pet Food Market size is estimated at USD 55.02 billion in 2024, and is expected to reach USD 78.88 billion by 2029, growing at a CAGR of 7.47% during the forecast period (2024-2029).

Dogs dominate the pet food market due to their high consumption rate, which is attributed to their large size

- Europe has a strong culture of pet ownership, and Europeans have a deep affection for their pets, resulting in a growing market for pet food products and services. As a result, the European pet food market grew by 38.7% between 2017 and 2022, driven by an increase in the pet population by 11.6% during the same period.
- The European pet food market is dominated by the dog food segment, which reached a market value of USD 19.48 billion in 2022. The dog food segment is leading due to the high consumption of dog food, driven by their large size, as well as a significant number of pet owners shifting from homemade meals to commercial pet food. There was also an increase in the expenditures on dogs by 35.1% from 2017 to 2022. As a result, the dog food segment is estimated to register a CAGR of 7.7% during the forecast period.
- In Europe, cats are the most popularly owned pets, with a population of 117.7 million in 2022. This rise in the number of cats has created a larger consumer base for cat food products. Cats are gaining popularity as pets due to their low maintenance requirements and cost-effectiveness compared to other pets. As a result, the cat food market witnessed significant growth, reaching a value of USD 19.44 billion in 2022.
- Other animals have unique nutritional requirements that need to be fulfilled through specialized pet food products. Therefore, the other pets segment grew by USD 1.94 billion between 2017 and 2022.
- The increasing awareness among pet owners about the benefits of pet food and the growing population of pets in the region are

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estimated to drive the pet food market during the forecast period.

The United Kingdom dominated the European pet food market mainly due to the high pet population and increased use of commercial pet foods

- The European pet food market was valued at USD 47.74 billion in 2022. The pet food market in the region is experiencing significant growth, which increased by 23.6% between 2017 and 2021. This growth can be attributed to multiple factors, including the rising pet population in the region, which reached 324.4 million in 2022, increasing from 290.5 million in 2017. The increasing trend of pet humanization and the increased focus of pet owners on the health and well-being of their pets have also contributed to the market's expansion.
- Among European countries, the UK pet food market is the largest, accounting for 14.9% of the European pet food market in 2022. This higher market share of the United Kingdom is mainly due to the rising pet population in the country, increasing use of commercial pet foods, increased availability of a diverse range of pet food diets, and the benefits and value for money that pet food offers have contributed to its popularity. Moreover, the increased demand for specialized pet food diets that enhance pet health and well-being from pet owners has also contributed to the market growth.
- Poland's pet food market is anticipated to be the fastest-growing market in Europe, with a CAGR of 14.3% during the forecast period. This is mainly attributed to the growing pet population, and a large number of pet owners are shifting from home-cooked food to commercial pet food in the country due to the rising trend of pet humanization.
- The increasing pet population in the region, the growing focus of pet owners on their pet health and well-being, and the increased adoption of commercial pet foods are the factors anticipated to drive the European pet food market, registering a CAGR of 6.4% during the forecast period.

Europe Pet 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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Growing awareness about the benefits of healthy, nutritious pet food and the convenience of purchasing from home through e-commerce websites are likely to drive expenditure on pets in the region

- 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 increasingly concerned about the health needs of their pets. These factors helped in increasing the pet expenditure per animal by 24% between 2017 and 2022. In 2022, dogs had the largest expenditure share, accounting for 37.9%, because of their higher consumption of pet food than cats and being fed with premium pet food. For instance, in the United Kingdom, people's average pet food expense was USD 330, more than a cat's food expense of USD 150 in 2022. Moreover, dogs are provided with services such as pet grooming and training for socialization with other dogs.
- Pet parents provide premium brand 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 increased disposable incomes. There is also a rise in purchasing medium-priced pet food due to improvements in the nutrition offered by these products.
- During the COVID-19 pandemic, there was an increase in pet food sales through online channels as most supermarkets had fewer product offerings due to the lockdown 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 the website has received 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 Food Industry Overview

The Europe Pet Food Market is fragmented, with the top five companies occupying 25.66%. 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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