

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

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Report description:

The Europe Pet Nutraceuticals Market size is estimated at USD 1.67 billion in 2024, and is expected to reach USD 2.44 billion by 2029, growing at a CAGR of 7.88% during the forecast period (2024-2029).

Dogs and cats are the largest consumers of pet nutraceuticals in the region due to the increased focus of pet owners on pet health

- Pet nutraceuticals are designed to provide nutritional and therapeutic benefits to pets. Pet nutraceuticals are derived from food sources that provide health benefits beyond basic nutrition. These products are available in various forms, such as supplements, treats, chews, powders, and liquids. In Europe, pet nutraceuticals accounted for 3% of the pet food market in 2022. The smaller share was because of their higher cost and lack of awareness concerning the usage and handling of nutraceuticals.

- Dogs held the major share of the European pet nutraceuticals market, valued at USD 744.9 million in 2022. The larger share of dogs in the pet nutraceuticals market was associated with their considerably higher population in 2022, which was 30% of the pet population in Europe. The pet nutraceuticals market for dogs grew by 14.2% between 2017 and 2021 because of the increase in dog population and the receptiveness of dog owners toward new pet products.

- Cats also have a majority share of the pet nutraceuticals market in the region; they accounted for a value share of USD 523.4 million in 2022. Cats were also the major pets in terms of population, accounting for 36% of the pet population in 2022. The growing adoption of cats and rising concerns among cat parents are estimated to drive the usage of nutraceuticals for cats in the region at a CAGR of 7.4% during the forecast period.

- The adoption of other animals and the concerns about their health are increasing. Other animals accounted for a value share of USD 186.1 million in 2022.

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- The increasing premiumization and rising pet health concerns are anticipated to drive the pet nutraceuticals market in Europe at a CAGR of 6.6% during the forecast period.

The United Kingdom dominated the market with the presence of its highly established distribution network for pet food

- Europe represents a significant presence in the global pet nutraceutical market, with a pet population of 109.7 million in 2022. Pet nutraceuticals constitute around 3.0% of the total European pet food market. The pet owners in the region demonstrate a growing focus on pet health and well-being driven by increased pet humanization. This evolving mindset among pet owners stimulates the demand for pet nutraceutical products.

- Among European countries, the United Kingdom occupied the largest market share, accounting for about 14.7% of the market value, which was valued at about USD 214.4 million in 2022. This larger market share in the United Kingdom is mainly attributed to the fact that pet owners in the United Kingdom are becoming increasingly aware of the importance of providing optimal nutrition for their pets. They recognize that pet supplements play a crucial role in maintaining their pet's health. More than a third of pet food buyers in the United States agree that supplements are the most efficient means of delivering functional benefits to pets.

- Germany and France followed as the second and third largest markets for pet supplements in the region, with market values of USD 184.1 million and USD 160.0 million, respectively, in 2022. The substantial market shares of these countries can be attributed to the increasing trend of pet ownership and the corresponding rise in pet expenditures.

- As pet owners throughout the region continue to recognize the advantages of pet nutraceuticals and place a stronger emphasis on their pets' health and well-being, the European pet nutraceuticals market is anticipated to register a CAGR of 6.5% during the forecast period.

Europe Pet Nutraceuticals Market Trends

Cats are the major companion pets adopted in Europe due to their adaptability to small spaces and because they are considered 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

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the region.

Higher consumption of premium pet food and growing awareness about the benefits of healthy, nutritious pet food are increasing pet expenditure in the region

- 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 helped in increasing the pet expenditure per animal by 37.1% 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 Nutraceuticals Industry Overview

The Europe Pet Nutraceuticals Market is fragmented, with the top five companies occupying 38.27%. The major players in this market are ADM, Mars Incorporated, Nestle (Purina), Vetoquinol and Virbac (sorted alphabetically).

Additional Benefits:

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

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