

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

Market Report | 2024-02-17 | 294 pages | Mordor Intelligence

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Report description:

The Germany Pet Food Market size is estimated at USD 6.91 billion in 2024, and is expected to reach USD 8.40 billion by 2029, growing at a CAGR of 3.98% during the forecast period (2024-2029).

Cats held the major share due to the significant transition from home-cooked food to commercial food, along with the higher population

- Germany has a strong affinity for pets, with 46.0% of households owning at least one pet and 14% of households having two or more pets as of 2022. This substantial pet population has led to continuous growth in the German pet food market, as the market consistently expands to meet the needs and demands of pet owners.

- The cats segment held a significant share of the German pet food market, accounting for a market value of USD 3.16 billion in 2022. The significant share can be attributed to the high population of cats in the country, accounting for 43.9%. The segment grew by 25.0% between 2017 and 2021, primarily driven by a significant number of pet owners transitioning from home-cooked food to commercial pet food in the country.

- The dog population accounted for 26.8% of the pet population in the country in 2022. Despite pet dogs having a lower population compared to other pets, they still held the second-largest market share of 37.6% in 2022, mainly due to the higher consumption of commercial pet food compared to other pet animals. The pet dog population is steadily increasing, and pet owners are becoming more interested in premium pet foods. Such factors are anticipated to drive the dogs segment of the market at a CAGR of 3.5% during the forecast period.

- Other pets accounted for 13.5% of the market in 2022. The limited market share of other pets can be attributed to these pets being typically small and, therefore, requiring relatively small amounts of food.

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- The increasing pet population and the rising demand for premium products are anticipated to drive the market during the forecast period.

Germany Pet Food Market Trends

Cats are the major pets in Germany due to their adaptability to smaller living spaces and the belief of bringing good luck

- In Germany, cats are the major pets adopted by people, and they accounted for 43.9% of the pet population in 2022. The high adoption of cats is mainly due to them being more adaptable to smaller living spaces than dogs and staying indoors without feeling cooped up. Cats are more highly regarded than dogs and considered to be symbols of good luck or fortune. The population of cat parents in the country has remained stable for the last two years since 2020, accounting for 23% in both 2019 and 2020 and reaching 14.7 million in 2020.
- There was a rise in the pet population during the pandemic, and the cat population increased by 11.5% between 2020 and 2022. People adopted more cats during the pandemic to have a companion at home and avoid loneliness. Cats are quieter than dogs, and during lockdowns, there was no need to take them on walks. This trend is expected to be witnessed for more time due to the average lifespan of a cat being more than 20 years.
- The cats can be adopted from different channels, such as specialized breeders, pet stores, and animal shelters in the country. The potential pet parents are expected to purchase pets from specialized breeders as compared to animal shelters because of the complex legal procedure required to adopt a cat or a pet from an animal shelter. The government also treats pets, including cats, as a citizen, as the pet parents are required to have passports for their cats to travel with them. Therefore, the rise in the cat population is due to factors such as their easy maintenance, an increase in the need for companionship, and people living in small apartments, which are anticipated to also help increase the demand for cat food during the forecast period.

The increasing trend of pet humanization and greater demand for premium products resulted in a rise in expenditure

- In Germany, the expenditure on pets experienced a significant increase, with a rise of about 15.3% between 2019 and 2022. This upward trend in pet expenses can be attributed to the growing number of pets in the country, which expanded from 36.8 million in 2019 to 39.8 million in 2022. Additionally, the trend of pet humanization led to a greater demand for premium products, including natural and grain-free pet food options.
- Pet owners' annual spending on dog food witnessed a growth of about 23.3%, while spending on cat food increased by about 24.0%. Other pet animals also experienced a rise in expenditure of around 9.3%. Sales of dog pet food showed a CAGR of 4.4% from 2016 to 2020, while cat food sales exhibited a slightly lower CAGR of 1.8%. These findings indicate a higher level of premiumization in dog food despite the dog population being about 64.1% lower than the cat population as of 2022.
- The demand for pet food in the country is on the rise, particularly for those providing specific nutrition, functional nutrition, and a variety of food experiences while also addressing safety and health concerns. This focus on special diets and ingredients has resulted in an increase in the average unit price, particularly in the premium and super-premium segments. Most of the premium pet products are marketed through specialty stores, whereas mid-priced pet products are available in both specialty stores and supermarkets. As of 2022, around 40.2% of all pet sales were through supermarkets in the country. The growing awareness of the

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benefits of high-quality pet food and the increasing premiumization of pet food are expected to continue driving pet expenditure in the country.

Germany Pet Food Industry Overview

The Germany Pet Food Market is fragmented, with the top five companies occupying 25.98%. The major players in this market are Colgate-Palmolive Company (Hill's Pet Nutrition Inc.), Heristo aktiengesellschaft, Mars Incorporated, Nestle (Purina) and Schell & Kampeter Inc. (Diamond Pet Foods) (sorted alphabetically).

Additional Benefits:

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

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