

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

Market Report | 2024-02-17 | 283 pages | Mordor Intelligence

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Report description:

The Poland Pet Food Market size is estimated at USD 2.5 billion in 2024, and is expected to reach USD 4.75 billion by 2029, growing at a CAGR of 13.70% during the forecast period (2024-2029).

Dogs dominate the Polish pet food market as they are popular pets in the country, and there was a rise in the usage of commercial foods for dogs

- Poland is one of the growing pet food markets in Europe. It accounted for a 3.7% share of the country's pet food market in 2022, which grew by 78.2% between 2017 and 2022. This growth is associated with the country's pet humanization trend, increasing usage of commercial products rather than home-cooked, and availability of a wide range of products.

- The dog food segment recorded the largest share of the market, with USD 1,085.5 million in 2022, and it is anticipated to reach USD 3,057.7 million in 2029. This significant share and growth was associated with a significant number of pet owners shifting from home-cooked food to commercial pet food in the country. Dogs have a significant share of the pet population, as they accounted for 47.5% in 2022, whereas cats accounted for 29.7%. Furthermore, there is a growing trend toward premium dog food products.

- The cats segment held the second-largest share in the country's pet food market. It accounted for 29.5% in 2022. This share was associated with the second-highest population, representing 29.7% of the total pet population in 2022, and the high usage of commercial products.

- The other animals include birds, small mammals, rodents, and ornamental fish. These animals have unique nutritional requirements that need to be fulfilled through specialized pet food products. Therefore, in 2022, they accounted for USD 177.8 million, which increased by 154.6% between 2017 and 2022. This was due to an increase in the popularity of keeping these

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alternative pet species and other animal populations by 18.0% between 2017 and 2022.

- The increasing usage of commercial foods and the rise in pet humanization are anticipated to drive the market during the forecast period, recording a CAGR of 14.3%.

Poland Pet Food Market Trends

The cat population in the country decreased by 37.8% between 2019 and 2022 due to a rise in inflation, pandemic-related restrictions, and a significant decrease in human population

- In Poland, cats are the second most popular pets after dogs, comprising about 29.7% of the total pet population in 2022. This popularity of cats is mainly due to their unique qualities, including agility, independence, and being a more cost-effective option compared to dogs. Additionally, cats are well-suited for small living spaces such as apartments, where owning a dog may not be as practical.

- Despite the popularity of cats as pets in Poland, the overall pet cat population experienced a decline of about 37.8% between 2019 and 2022. Several factors contribute to this decrease, with inflation playing a significant role in reduced pet ownership rates. The easing of pandemic-related restrictions has also impacted the pet cat population as people return to in-person work and school. Furthermore, Poland witnessed a significant decrease in its human population, with 520,000 deaths recorded in 2021, marking the highest figure since World War II.

- Moreover, the Polish Academy of Sciences has classified cats as invasive alien species due to growing scientific evidence of their negative impact on biodiversity. The substantial hunting and killing of birds and mammals by domestic cats have prompted their inclusion on the list. This categorization may discourage some individuals from owning cats as pets.

- However, the trend of humanizing pets and the availability of pet stores that offer a range of cat care services, as well as the rising popularity of cat cafes in Poland, may signal a shift in ownership patterns and attitudes toward cats as cultural and economic factors continue to evolve. These factors are expected to contribute to an increase in the pet cat population in the country during the forecast period.

Increasing disposable income and demand for high-quality, premium pet food are driving pet expenditure in the country

- In Poland, there has been an increase in overall pet food expenditure, which increased by 23.9% between 2017 and 2022. This growth occurred despite a decreasing trend in the dog and cat population within the country. The key driver behind the increased expenditure on pet food is the rising prices of pet food products. For instance, the prices of wet dog food per metric ton in the country surged from USD 2,078 in 2020 to USD 2,444.9 in 2022, reflecting a significant 17.7% increase in just two years. These increased prices have contributed to the overall growth in pet food expenditure.

- Additionally, the trends of pet humanization and premiumization have played a crucial role. Pet owners, particularly those with higher incomes, are increasingly treating their pets as family members, leading to a surge in sales of premium and natural pet food products. Pet owners are seeking pet food options that offer specific nutrition while addressing safety and health concerns. Consequently, there has been a growing demand for pet food varieties that cater to special diets and incorporate high-quality ingredients. This focus on premium and specialized products has led to an increase in the average unit price, particularly within

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the premium segment. As a result, between 2019 and 2022, expenditure on dogs rose by 21.8%, expenditure on cats increased by 22.3%, and expenditure on other animals saw a growth of 8.7%.

- Pet food prices in Poland were affected by the political conflict between Russia and Ukraine in 2022, causing challenges in procuring raw materials and leading to an impact on pet expenditure in the country. Despite these challenges, the increasing demand for high-quality and premium pet food is anticipated to drive pet expenditure during the forecast period.

Poland Pet Food Industry Overview

The Poland Pet Food Market is fragmented, with the top five companies occupying 27.40%. The major players in this market are Bewital Holding GmbH & Co. KG, Colgate-Palmolive Company (Hill's Pet Nutrition Inc.), Mars Incorporated, Schell & Kampeter Inc. (Diamond Pet Foods) and Vafo Praha, s.r.o. (sorted alphabetically).

Additional Benefits:

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

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