

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

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Report description:

The Russia Pet Food Market size is estimated at USD 6.36 billion in 2024, and is expected to reach USD 10.92 billion by 2029, growing at a CAGR of 11.42% during the forecast period (2024-2029).

Cats dominated the Russian pet food market due to their large population in the country, and dog pets is the fastest-growing segment

- The pet population in Russia is growing with the increase in loneliness among the younger generation, which further increased in line with the COVID-19 pandemic and the resultant lockdowns in 2020. The pet food market in Russia accounted for 9.2% of the European pet food market in 2022. The pet food market in the country increased by 75% between 2017 and 2021, with the increase in pet humanization practices among pet parents driving the usage of commercial pet food products. Moreover, the increase in the pet population during the same period by 6% also contributed to the increase in the market.
- Cats were the major pets in the country concerning the pet food market in 2022, with its share amounting to USD 2 billion, followed by dogs and other animals, amounting to values of USD 1.8 billion and USD 627 million, respectively. It is associated with the higher cat population, which accounted for 41.4% of the Russian pet population in 2022.
- In Russia, the other animals' population was 26.9% of the pet population in 2022, and the limited consumption by small animals, birds, and reptiles has made them occupy a lower share of the pet food market.
- Dogs were also the fastest-growing pets in the pet food market in the country, registering a CAGR of 14.2% during the forecast period, which is associated with the increasing adoption of dogs and the increasing usage of high-quality pet food products and premiumization among pet parents.
- Therefore, the increase in the pet population, increase in the usage of premium and high-quality pet food products, and increase

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in pet humanization, especially after the COVID-19 pandemic, are estimated to drive the Russian pet food market at a CAGR of 12.6% during the forecast period in the country.

Russia Pet Food Market Trends

Russia holds third place in the global cat population, fueled by cultural preference and their adaptability to smaller living spaces

- Globally, Russia has the third-largest population of cats as pets, and the country has a growing trend to have more than one cat in their homes. The pet cat population has the largest share of Russia's pet population, which has grown steadily over the last few years. In 2022, the cat population accounted for 41.4%. It grew at a rate of 3.1% between 2017 and 2022 because of the cultural preferences in the country, as they are considered lucky and can adapt to smaller living spaces and stay indoors for a longer time without feeling cooped up.

- There was a growing trend of pet humanization among cat parents during the historical period. There is an increase in pet humanization as more than 85% of pet parents, including cat parents, consider their pets family members, friends, or children. Therefore, these trends are expected to help boost the population of cats in the country that are fed pet food products.

- There is an increase in the consumption of pet food in the urban and rural areas of the country, attributed to growing awareness among pet parents about providing a healthy diet to their pets. For instance, in 2021, about 16% of cat parents identified their pet's health issues, thus boosting the consumption of pet veterinary diets. The growth of cat food in urban areas is also expected to be higher as more than 60% of domesticated cats live in the cities. Therefore, the increase in pet humanization, growing awareness about the benefits of providing healthy diets, and the country adopting more than one cat are anticipated to help in the growth of the pet population and pet food in the country during the forecast period.

Increasing pet humanization, coupled with the growing demand for premium pet food, is driving pet expenditure in Russia

- There has been a significant upward trend in pet food expenditure in Russia, with an increase of 23.0% between 2019 and 2022. Despite slow growth in dog and cat populations, pet expenditure continues to rise due to increasing pet food prices. For instance, the cost of wet pet food per metric ton surged from USD 1,613.7 in 2020 to USD 2,279.4 in 2022, reflecting a significant 41.3% increase over two years. This price surge, coupled with the rising popularity of pet humanization and premiumization, has contributed to the growth in pet expenditure.

- Between 2019 and 2022, expenditure on pet dogs increased by 22.5%, while spending on cats grew by 22.8%, and expenditure on other pets rose by 9.1% in Russia. Pet humanization is becoming increasingly popular, particularly among high-income pet owners who are driving sales by opting for natural ingredients and premium pet products. The demand for specialized nutrition that addresses safety and health concerns is also rising, resulting in higher average unit prices, especially in the premium segments.

- The political conflict between Russia and Ukraine in 2022 significantly impacted pet food prices, leading to challenges in sourcing raw materials and importing pet foods. Consequently, this factor has directly affected pet expenditure in the country.

- In terms of sales channels, offline retail stores, including supermarkets, specialty stores, and convenience stores, accounted for 90.7% of pet food sales in 2022, while e-commerce comprised the remaining 9.3%. The ongoing trend toward high-quality and

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premium pet food, along with the growing awareness of its benefits, is projected to drive the growth of pet expenditure during the forecast period.

Russia Pet Food Industry Overview

The Russia Pet Food Market is fragmented, with the top five companies occupying 35.11%. The major players in this market are Colgate-Palmolive Company (Hill's Pet Nutrition Inc.), Farmina Pet Foods, Mars Incorporated, Nestle (Purina) 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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