

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

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Report description:

The South Africa Pet Food Market size is estimated at USD 0.77 billion in 2024, and is expected to reach USD 1.47 billion by 2029, growing at a CAGR of 13.81% during the forecast period (2024-2029).

Dogs dominated the pet food market in South Africa due to their higher population and large per capita consumption compared to other pets

- Pet ownership is increasing in South Africa as more households are encouraging the companionship of pets. In 2022, cats and dogs were the most popular choices, accounting for 60.9% and 13.4% of the country's pet population, respectively.
- Dogs have a larger share of the pet food market in South Africa. Their strong market presence was valued at USD 431.3 million in 2022. Dogs consume a higher amount of pet food compared to other pets, which contributes to their substantial market share. The demand for premium dog food, including grain-free and organic options, is anticipated to register a CAGR of 14.6% during the forecast period.
- Cats also hold a significant share of the South African pet food market, with a market value of USD 61.3 million in 2022. The cat food market is projected to register a CAGR of 13.2% during the forecast period. The increasing preference for specialized diets, such as hypoallergenic and natural cat food, is driving this growth.
- Although other pets, such as birds, fish, and rodents, account for 25.6% of the country's pet population, their market value was only USD 53.2 million in 2022. This can be attributed to the fact that these pets are generally small in size and require relatively small amounts of food.
- The COVID-19 pandemic has resulted in a rise in pet ownership in South Africa, and considering the average lifespan of pets (8 to 10 years), the pet food market is projected to be impacted in the long term. The increasing population of pet owners and their

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demand for high-quality pet products will continue to drive the market's growth during the forecast period.

South Africa Pet Food Market Trends

The COVID-19 pandemic and the increasing trend of cat cafes have positively impacted the pet cat population in South Africa

- In South Africa, cats have a long history of being domesticated as companions and pets. They accounted for 13.4% of the total pet population in 2022. However, the pet cat population in the country is limited due to negative stereotypes surrounding cats. For instance, the belief that black cats bring bad luck has impacted adoption rates, resulting in black cats waiting longer to be adopted than cats of other colors in shelters.

- Despite the limited number of pet cats in South Africa, there has been a stable or slightly increasing trend in their population. Between 2019 and 2022, the population of pet cats in the country increased by about 3.2%. This increase was largely attributed to the COVID-19 pandemic, which led people to spend more time at home due to lockdowns with restrictive movement. As a result, many individuals sought out pets, including cats, for companionship.

- The limited growth of pet cats in South Africa is mainly attributed to government restrictions. The Animal Protection Act of 1962 states that individuals are not allowed to have more than four cats on a residential property and not more than six on an agricultural property, which limits the overall pet cat population in the country. It is estimated that around 1.7 million street or stray cats are currently present in the country. However, most of the stray cats are not completely homeless as there are informal pet owners. There has been an increasing trend of cat cafes in the country, where customers can enjoy a beverage or a meal while interacting with cats. These trends may gain popularity for pet cats, whose population is anticipated to increase during the forecast period.

Pet humanization and premiumization are driving pet expenditure in South Africa, particularly among high-income pet owners

- In South Africa, there has been a significant increase in pet expenditure, which increased by about 19.5% between 2019 and 2022. Despite the relatively slower pet population growth, overall pet spending has seen a noticeable rise. This can be attributed to the country's increasing pet food costs. For instance, in 2022, the prices of wet dog food per metric ton witnessed a 10.2% increase, rising from USD 5,647.8 in 2020 to USD 6,223.1. This upward trend reflects the willingness of pet owners to invest more in high-quality pet food, driven by the growing pet humanization.

- From 2019 to 2022, South Africa experienced a 23.0% increase in expenditure on pet dogs and cats, while spending on other pets grew by 8.8%. Pet humanization has gained popularity, particularly among high-income pet owners, who are driving sales by opting for premium and natural pet food products. However, the COVID-19 pandemic had a significant impact on low-income individuals. These individuals became more price-sensitive and shifted toward non-premium pet food products for their pets.

- In terms of specific expenditure, as of 2022, spending on dogs accounted for about 46.0% of the total pet expenditure, valued at USD 417.5, while expenditure on cats and other pet animals reached USD 303.8 and USD 186.7, respectively. The pet food market in South Africa is dominated by offline retail stores, capturing around 95.0% of the market share in the same year. However, the rising popularity of e-commerce can be attributed to the high listing fees imposed by supermarkets.

- South Africa's growing awareness of the benefits of high-quality pet food and the ongoing premiumization are the factors

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expected to drive pet expenditure during the forecast period.

South Africa Pet Food Industry Overview

The South Africa Pet Food Market is fragmented, with the top five companies occupying 31.85%. The major players in this market are Colgate-Palmolive Company (Hill's Pet Nutrition Inc.), FARMINA PET FOODS, General Mills Inc., Mars Incorporated and Nestle (Purina) (sorted alphabetically).

Additional Benefits:

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

Table of Contents:

1 EXECUTIVE SUMMARY & KEY FINDINGS

2 REPORT OFFERS

3 INTRODUCTION

3.1 Study Assumptions & Market Definition

3.2 Scope of the Study?

3.3 Research Methodology

4 KEY INDUSTRY TRENDS

4.1 Pet Population

4.1.1 Cats

4.1.2 Dogs

4.1.3 Other Pets

4.2 Pet Expenditure

4.3 Regulatory Framework

4.4 Value Chain & Distribution Channel Analysis

5 MARKET SEGMENTATION (includes market size in Value in USD and Volume, Forecasts up to 2029 and analysis of growth prospects)

5.1 Pet Food Product

5.1.1 Food

5.1.1.1 By Sub Product

5.1.1.1.1 Dry Pet Food

5.1.1.1.1.1 By Sub Dry Pet Food

5.1.1.1.1.1.1 Kibbles

5.1.1.1.1.1.2 Other Dry Pet Food

5.1.1.1.2 Wet Pet Food

5.1.2 Pet Nutraceuticals/Supplements

5.1.2.1 By Sub Product

5.1.2.1.1 Milk Bioactives

5.1.2.1.2 Omega-3 Fatty Acids

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- 5.1.2.1.3 Probiotics
- 5.1.2.1.4 Proteins and Peptides
- 5.1.2.1.5 Vitamins and Minerals
- 5.1.2.1.6 Other Nutraceuticals
- 5.1.3 Pet Treats
 - 5.1.3.1 By Sub Product
 - 5.1.3.1.1 Crunchy Treats
 - 5.1.3.1.2 Dental Treats
 - 5.1.3.1.3 Freeze-dried and Jerky Treats
 - 5.1.3.1.4 Soft & Chewy Treats
 - 5.1.3.1.5 Other Treats
- 5.1.4 Pet Veterinary Diets
 - 5.1.4.1 By Sub Product
 - 5.1.4.1.1 Diabetes
 - 5.1.4.1.2 Digestive Sensitivity
 - 5.1.4.1.3 Oral Care Diets
 - 5.1.4.1.4 Renal
 - 5.1.4.1.5 Urinary tract disease
 - 5.1.4.1.6 Other Veterinary Diets
- 5.2 Pets
 - 5.2.1 Cats
 - 5.2.2 Dogs
 - 5.2.3 Other Pets
- 5.3 Distribution Channel
 - 5.3.1 Convenience Stores
 - 5.3.2 Online Channel
 - 5.3.3 Specialty Stores
 - 5.3.4 Supermarkets/Hypermarkets
 - 5.3.5 Other Channels

6 COMPETITIVE LANDSCAPE

- 6.1 Key Strategic Moves
- 6.2 Market Share Analysis
- 6.3 Company Landscape
- 6.4 Company Profiles
 - 6.4.1 Alltech
 - 6.4.2 Colgate-Palmolive Company (Hill's Pet Nutrition Inc.)
 - 6.4.3 FARMINA PET FOODS
 - 6.4.4 General Mills Inc.
 - 6.4.5 Mars Incorporated
 - 6.4.6 Montego
 - 6.4.7 Nestle (Purina)
 - 6.4.8 Schell & Kampeter Inc. (Diamond Pet Foods)
 - 6.4.9 Vafo Praha, s.r.o.
 - 6.4.10 Virbac

7 KEY STRATEGIC QUESTIONS FOR PET FOOD CEOS

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8 APPENDIX

8.1 Global Overview

8.1.1 Overview

8.1.2 Porter's Five Forces Framework

8.1.3 Global Value Chain Analysis

8.1.4 Market Dynamics (DROs)

8.2 Sources & References

8.3 List of Tables & Figures

8.4 Primary Insights

8.5 Data Pack

8.6 Glossary of Terms

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