

South America Dog Food - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2017 - 2029

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Report description:

The South America Dog Food Market size is estimated at USD 9.94 billion in 2024, and is expected to reach USD 17.54 billion by 2029, growing at a CAGR of 12.03% during the forecast period (2024-2029).

Veterinary diets are the fastest-growing segment, driven by increasing incidence of diseases such as renal, urinary tract, and diabetes

- In South America, dogs are the major pets dominating the overall pet food market due to the higher per capita consumption and high population. Therefore, in 2022, dogs held 68.8% of the region's pet food market, which increased by 83.9% between 2017 and 2022 due to an increase in the dog population by 12.7% during the same period.

- In 2022, the pet food segment was the largest segment of the regional dog food market, with a market value of USD 6,038.3 million. It is due to the regular feeding of pet food to meet their daily nutritional requirements, which act as a staple food for dogs. Moreover, dry pet food dominated over wet pet food as it accounted for a 75.3% share in 2022 due to its convenience to feed, cost-effectiveness, high shelf life, and nutritional balance.

- The treats segment was the second-largest segment, with a market value of USD 1,041.8 million in 2022, followed by veterinary diets (USD 701.5 million) and nutraceuticals/supplements (USD 199.2 million). The treats segment grew by 79.2% between 2017 and 2022 due to their advantages, such as positive reinforcement during training sessions, source of mental stimulation and entertainment, providing special indulgence, and strengthening the bond between the pet and its parent.

- However, the veterinary diets market is projected to register the fastest CAGR of 15.6% during the forecast period. It is due to the growing adoption of veterinary diets as a proactive approach to preventive care for dogs and the increasing incidence of diseases such as renal, urinary tract, and diabetes.

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- The increase in population, increased awareness of preventive approaches, rise in pet humanization, and advantages of product types are the factors expected to drive the market with a CAGR of 12.3% during the forecast period.

Brazil dominated the market with the presence of a highly established distribution network

- In 2022, South America emerged as one of the largest markets in the global dog food market, with a market value of around USD 7.97 billion. Brazil and Argentina are the major contributors to the dog food market in South America due to the high pet ownership rates in these countries. The South American dog food market grew by 84.9% from 2017 to 2022, driven by the increasing adoption of pets, the growing awareness of dog health and wellness, and the rising trend of pet humanization.

- Brazil dominates the South American dog food market, with a market value of USD 5.53 billion in 2022. This is mainly due to the country's significant pet dog population, which reached 5.9 million in 2022. Growing disposable income, changing demographic patterns, and evolving consumer preferences have also contributed to Brazil's strong market presence.

- Argentina is one of the biggest pet-loving countries in South America. Dogs are the primary choice of pets, accounting for 36.4% of the pet population of the country in 2022. This significant dog population has contributed to the growth of the dog food market in the country, which reached a market value of USD 800.8 million in the same year.

- The Rest of South America segment includes countries like Chile, Paraguay, and Venezuela. There is a rising demand for dog food products in these countries as more people adopt dogs as pets. The dog food market in the Rest of South America was valued at USD 1.64 billion in 2022. It is driven by the increased humanization of pets, higher disposable incomes, and a shift in customer preferences toward commercial pet food.

- The growing dog population, increased disposable income, and pet adoption in South America are expected to fuel the growth of the market during the forecast period.

South America Dog Food Market Trends

Dogs are the most popular and valued pets in South America, accounting for 29.8% of the total pet population

- In South America, the pet dog population accounted for about 29.8% of the total pet population in 2022. Dog ownership has been increasing across many South American countries. Unlike European countries, South Americans prefer dogs to cats and are highly valued in many cultures across the region, with many families considering them as part of their family. As a result, the pet dog population has been steadily increasing over the years.

- Between 2019 and 2022, the dog population in South America increased by about 6.0%. This could be attributed to the impact of the COVID-19 pandemic. With people spending more time at home due to lockdown restrictions, there was a surge in the ownership of pet dogs throughout the region.

- As of 2022, Brazil held the majority share of pet dogs in South America, accounting for about 60.4% of the total population. Brazil ranked second in the world in terms of the pet dog population, with around 59.7 million pet dogs, only behind the United States. In addition, Brazil has the largest number of small dogs worldwide, accounting for 55.0% of all pet dogs weighing less than 20 lbs.

- In many South American countries, there are accessible stores that cater to the needs of pet owners, including food, toys, and grooming products. Pet stores and veterinary clinics are also becoming more widespread, making it easier for pet owners to provide proper care for their dogs. There is an increasing trend of dog humanization in the region. There are many events, like "Carnaval do Cao" or "Carnival of Dogs," that feature plenty of contests, musical performances, and dog shows with a variety of costumes. These trends are anticipated to increase overall dog ownership in the region during the forecast period.

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Brazil stands out with the highest pet expenditure in the region due to higher-income individuals and premiumization

- The expenditure on pet dogs in South America has been on a steady increase, which increased by about 21.0% between 2019 and 2022. This increase is mainly due to the increase in pet ownership across the region. For instance, the number of households owning a pet dog in Brazil increased by about 6.5%, while in Argentina, it increased by about 6.9% between 2016 and 2020. Additionally, pet owners in the region are increasingly focused on pet humanization, and higher-income pet owners are driving sales growth through the use of natural ingredients and product premiumization. For instance, the retail sales value of premium dry dog food in Brazil saw a rise from USD 335.7 million in 2016 to USD 748.1 million in 2022, with a CAGR of 14.7%, reflecting the escalating demand for premium dog products.
- However, with an economic downturn prevailing across the region, price sensitivity has become a crucial factor in choosing dog food brands. In Argentina, for instance, pet owners frequently switch brands or opt for the most affordable options to manage their expenses. The largest portion of sales in 2020 belonged to 'Economy' food brands, which accounted for 49.9% of the total dry dog food sales value. This trend indicates the leading preference for cost-effective dog food options.
- Offline retail channels such as pet shops, vet clinics, and supermarkets are the preferred distribution channels for purchasing pet food products in the region. However, during the COVID-19 pandemic, e-commerce's share in the distribution of pet food reached 13.2% as of 2022. The higher consumption of premium pet food and growing awareness about the benefits of healthy, nutritious pet food helped in increasing pet expenditure in the region.

South America Dog Food Industry Overview

The South America Dog Food Market is fragmented, with the top five companies occupying 26.56%. The major players in this market are BRF Global, Empresas Carozzi SA, Mars Incorporated, Nestle (Purina) and Premierpet (sorted alphabetically).

Additional Benefits:

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

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