

Pet Care in Bulgaria

April 2024

Table of Contents

Pet Care in Bulgaria

EXECUTIVE SUMMARY

Pet care in 2024: The big picture

2024 key trends

Competitive landscape

Retailing developments

What next for pet care?

MARKET INDICATORS

Table 1 - Pet Populations 2019-2024

MARKET DATA

Table 2 - Sales of Pet Food by Category: Volume 2019-2024

Table 3 - Sales of Pet Care by Category: Value 2019-2024

Table 4 - Sales of Pet Food by Category: % Volume Growth 2019-2024

Table 5 - Sales of Pet Care by Category: % Value Growth 2019-2024

Table 6 - NBO Company Shares of Pet Food: % Value 2019-2023

Table 7 - LBN Brand Shares of Pet Food: % Value 2020-2023

Table 8 - NBO Company Shares of Dog and Cat Food: % Value 2019-2023

Table 9 - LBN Brand Shares of Dog and Cat Food: % Value 2020-2023

Table 10 - Penetration of Private Label in Pet Care by Category: % Value 2019-2024

Table 11 - Distribution of Pet Care by Format: % Value 2019-2024

Table 12 - Distribution of Pet Care by Format and Category: % Value 2024

Table 13 - Distribution of Dog and Cat Food by Format: % Value 2019-2024

Table 14 - Distribution of Dog and Cat Food by Format and Category: % Value 2024

Table 15 - Forecast Sales of Pet Food by Category: Volume 2024-2029

Table 16 - Forecast Sales of Pet Care by Category: Value 2024-2029

Table 17 - Forecast Sales of Pet Food by Category: % Volume Growth 2024-2029

Table 18 - Forecast Sales of Pet Care by Category: % Value Growth 2024-2029

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Cat Food in Bulgaria

KEY DATA FINDINGS

2024 DEVELOPMENTS

Cat food bolstered by the growing cat population, humanisation trend and growing awareness of the health benefits of prepared cat food

Wet cat food continues to gain momentum while dry cat food remains the most popular

Nestlé and Mars retain the outright lead, though private label gains momentum

PROSPECTS AND OPPORTUNITIES

Stronger growth in volume than current value sales in cat food over the forecast period

Nestlé and Mars retain the lead while Royal Canin extends its specialisation in segmented products

Wider reach of modern grocery retailers boosts the consumer base and offers convenience for cat owners

CATEGORY INDICATORS

Table 19 - Cat Owning Households: % Analysis 2019-2024

Table 20 - Cat Population 2019-2024

Table 21 - Consumption of Cat Food by Prepared vs Non-prepared: % Analysis 2019-2024

CATEGORY DATA

Summary 2 - Cat Food by Price Band 2024

Table 22 - Sales of Cat Food by Category: Volume 2019-2024

Table 23 - Sales of Cat Food by Category: Value 2019-2024

Table 24 - Sales of Cat Food by Category: % Volume Growth 2019-2024

Table 25 - Sales of Cat Food by Category: % Value Growth 2019-2024

Table 26 - Sales of Dry Cat Food by Life-Cycle: % Value 2019-2024

Table 27 - Sales of Wet Cat Food by Life-Cycle: % Value 2019-2024

Table 28 - NBO Company Shares of Cat Food: % Value 2019-2023

Table 29 - LBN Brand Shares of Cat Food: % Value 2020-2023

Table 30 - LBN Brand Shares of Cat Treats and Mixers: % Value 2020-2023

Table 31 - Distribution of Cat Food by Format: % Value 2019-2024

Table 32 - Forecast Sales of Cat Food by Category: Volume 2024-2029

Table 33 - Forecast Sales of Cat Food by Category: Value 2024-2029

Table 34 - Forecast Sales of Cat Food by Category: % Volume Growth 2024-2029

Table 35 - Forecast Sales of Cat Food by Category: % Value Growth 2024-2029

Dog Food in Bulgaria

KEY DATA FINDINGS

2024 DEVELOPMENTS

Slower growth for dog food in 2024 thanks to growing demand for economy products and private label

Distribution trends continue to stimulate switches to prepared dog food

Leading players face share erosion due to competition from new entrants

PROSPECTS AND OPPORTUNITIES

Positive outlook for dog food thanks to the humanisation trend, growth in the dog population and rising health awareness

Dog food benefits from wider distribution to smaller towns

The humanisation trend boosts demand for higher quality foods and stimulates the launch of a range of services including dog bakeries and concept stores

CATEGORY INDICATORS

Table 36 - Dog Owning Households: % Analysis 2019-2024

Table 37 - Dog Population 2019-2024

Table 38 - Consumption of Dog Food by Prepared vs Non-prepared: % Analysis 2019-2024

CATEGORY DATA

Summary 3 - Dog Food by Price Band 2024

Table 39 - Sales of Dog Food by Category: Volume 2019-2024

Table 40 - Sales of Dog Food by Category: Value 2019-2024

Table 41 - Sales of Dog Food by Category: % Volume Growth 2019-2024

Table 42 - Sales of Dog Food by Category: % Value Growth 2019-2024

Table 43 - Sales of Dry Dog Food by Life-Cycle: % Value 2019-2024

Table 44 - Sales of Wet Dog Food by Life-Cycle: % Value 2019-2024

Table 45 - NBO Company Shares of Dog Food: % Value 2019-2023

Table 46 - LBN Brand Shares of Dog Food: % Value 2020-2023

Table 47 - LBN Brand Shares of Dog Treats and Mixers: % Value 2020-2023

Table 48 - Distribution of Dog Food by Format: % Value 2019-2024

Table 49 - Forecast Sales of Dog Food by Category: Volume 2024-2029

Table 50 - Forecast Sales of Dog Food by Category: Value 2024-2029

Table 51 - Forecast Sales of Dog Food by Category: % Volume Growth 2024-2029

Table 52 - Forecast Sales of Dog Food by Category: % Value Growth 2024-2029

Other Pet Food in Bulgaria

KEY DATA FINDINGS

2024 DEVELOPMENTS

Rising demand for small mammal/reptile food and bird food lifts total volume sales

Dajana and Vitakraft remain the leading players in value terms

Pet shops and superstores retain the outright lead in distribution with such players also helping to develop retail e-commerce for other pet food

PROSPECTS AND OPPORTUNITIES

Demand subdued by declines in pet fish, bird and reptile numbers

Pet shops and superstores retain their outright lead in other pet food distribution

Pet humanisation boosts sales of higher quality foods and special treats in other pet food over the forecast period

CATEGORY INDICATORS

Table 53 - Other Pet Population 2019-2024

CATEGORY DATA

Table 54 - Sales of Other Pet Food by Category: Volume 2019-2024

Table 55 - Sales of Other Pet Food by Category: Value 2019-2024

Table 56 - Sales of Other Pet Food by Category: % Volume Growth 2019-2024

Table 57 - Sales of Other Pet Food by Category: % Value Growth 2019-2024

Table 58 - LBN Brand Shares of Bird Food: % Value 2020-2023

Table 59 - LBN Brand Shares of Fish Food: % Value 2020-2023

Table 60 - LBN Brand Shares of Small Mammal/Reptile Food: % Value 2020-2023

Table 61 - Distribution of Other Pet Food by Format: % Value 2019-2024

Table 62 - Forecast Sales of Other Pet Food by Category: Volume 2024-2029

Table 63 - Forecast Sales of Other Pet Food by Category: Value 2024-2029

Table 64 - Forecast Sales of Other Pet Food by Category: % Volume Growth 2024-2029

Table 65 - Forecast Sales of Other Pet Food by Category: % Value Growth 2024-2029

Pet Products in Bulgaria

KEY DATA FINDINGS

2024 DEVELOPMENTS

Demand remains strong for other pet products in 2024

Growth in pet grooming boosts sales of dog shampoo

Pet shops and superstores remains the leading distributor of pet products boosted further by cooperations with grocery retailers

PROSPECTS AND OPPORTUNITIES

Positive development of pet products over the forecast period

Technical innovations and increasing digitalisation characterise pet products over the forecast period

Growing concerns over environmental friendliness impact the development of other pet product ranges

CATEGORY DATA

Table 66 - Sales of Pet Products by Category: Value 2019-2024

Table 67 - Sales of Pet Products by Category: % Value Growth 2019-2024

Table 68 - Sales of Pet Healthcare by Type: % Value 2019-2024

Table 69 - Sales of Other Pet Products by Type: % Value 2019-2024

Table 70 - NBO Company Shares of Pet Products: % Value 2019-2023

Table 71 - LBN Brand Shares of Pet Products: % Value 2020-2023

Table 72 - Distribution of Pet Products by Format: % Value 2019-2024

Table 73 - Forecast Sales of Pet Products by Category: Value 2024-2029

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/pet-care-in-bulgaria/report.