



Pet Care in Western Europe

May 2024

Table of Contents

INTRODUCTION

Scope

Key findings

REGIONAL OVERVIEW

Western Europe has very similar retail value sales of dog food and cat food

Western Europe underperforming the global growth rates

Following the stagnation in 2022, positive growth expected in the following years

Turkey records the most dynamic growth over the review period

Cat treats and mixers enjoy strong growth in Western Europe over 2019-2024

Cat food most dynamic over 2019-2024

Pet care sales generally remain resilient despite inflation pushing up prices

Demand for premium pet food remains strong despite tough economic climate

Pet shops and superstores remains the biggest distribution channel...

...but e-commerce continues gaining share in pet care

Consolidation in the pet shops and superstores channel in Spain

LEADING COMPANIES AND BRANDS

Private label accounts for a fifth of Western European pet care sales

Mars sees a dip in its UK share after a pricing dispute with retailer Tesco

Most of the top 10 players have a presence in a number of countries across Western Europe

Mars and Nestlé lines continue to dominate the regional top 10 brands

FORECAST PROJECTIONS

Positive but slowing growth expected over the forecast period

Premiumisation and pet humanisation likely to continue shaping pet care trends

COUNTRY SNAPSHOTS

Austria: Market Context

Austria: Competitive and Retail Landscape

Belgium: Market Context

Belgium: Competitive and Retail Landscape

Denmark: Market Context

Denmark: Competitive and Retail Landscape

Finland: Market Context

Finland: Competitive and Retail Landscape

France: Market Context

France: Competitive and Retail Landscape

Germany: Market Context

Germany: Competitive and Retail Landscape

Greece: Market Context

Greece: Competitive and Retail Landscape

Ireland: Market Context

Ireland: Competitive and Retail Landscape

Italy: Market Context

Italy: Competitive and Retail Landscape

Netherlands: Market Context

Netherlands: Competitive and Retail Landscape

Norway: Market Context

Norway: Competitive and Retail Landscape

Portugal: Market Context

Portugal: Competitive and Retail Landscape

Spain: Market Context

Spain: Competitive and Retail Landscape

Sweden: Market Context

Sweden: Competitive and Retail Landscape

Switzerland: Market Context

Switzerland: Competitive and Retail Landscape

Turkey: Market Context

Turkey: Competitive and Retail Landscape

UK: Market Context

UK: Competitive and Retail Landscape

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-western-europe/report.