



## The German Pet Market

### Sales and Structural Data 2004

The love of the Germans for their pets is still going on: In the year 2004, the number of dogs, cats, birds and small pets increased by 1.3 per cent to now 23.1 million – and ornamental fish and terrarium pets are even not included.

However, the recession of business activity left its mark on the pet market in Germany: The dropped price level resulted in a decrease of the market by 2.3 per cent. This especially affected the market for pet food.

### Pet Keeping

In Germany, altogether 23.1 mio. pets (ornamental fish and reptiles not included) live in more than one third of the households. This means a growth of 1.3 per cent towards 2003 (22.8 mio.).

### Pet Population in Germany 2004

Species	Total mio. 2003	Total mio. 2004
Dogs	5 mio. in 13.3 % of the households	5.3 mio. in 13.4 % of the households
Cats	7.3 mio in 15.2 % of the households	7.5 mio. in 15.3 % of the households
Small pets	5.9 mio. in 5.6 % of the households	6.1 mio. in 5.9 % of the households
Birds	4.6 mio. in 6 % of the households	4.2 mio. in 5.8 % of the households
Aquariums	1.9 mio. in 4.1 % of the households	1.95 mio. in 4.4 % of the households
Garden ponds with fish	1.2 mio. in 3.5 % of the households	1.25 mio. in 3.6 % of the households
Terrariums	0.4 mio. in 1.1 % of the households	0.42 mio. in 1.1 % of the households

## Socio-demographic Profile

Age	Households with pets
Up to 29 years	10 %
30-39 Years	23 %
40-49 Years	25 %
50-59 Years	18 %
More than 60 Years	24 %

## Size of the Households

Household with 1 person	24 %
Household with 2 persons	33 %
Household with 3 persons and more	43 %

## Market Volume Pet Supply

Category of goods	2003 Total mio. Euros	2004 Total mio. Euros
Food ready to eat	2,220	2,152
Accessories	761	760
<b>Total</b>	<b>2,981</b>	<b>2,912</b>

Sales figures at consumer prices

## Sales of Food ready to eat

Dog food	2004 mio. Euros	Change with respect to previous year
Moist food	315	
Dry food*	342	
Snacks	238	
<b>Total</b>	<b>895</b>	<b>-3.6 %</b>

\*incl. semi moist food

Cat food	2004 mio. Euros	Change with respect to previous year
Moist food	719	
Dry food	201	
Snacks/ Cat milk	93	
<b>Total</b>	<b>1,013</b>	<b>-3.1 %</b>

Food for ornamental birds*	2004 mio. Euros	Change with respect to previous year
Only / main food	53	
Snacks/Treats	28	
<b>Total</b>	<b>81</b>	<b>- 9.1 %</b>

\*in addition, appr. 25 mio. Euros winter food and food sold loose with breeders

Food for ornamental fish/ incl. pond food	2004 mio. Euros	Change with respect to previous year
<b>Main food total</b>	<b>65</b>	<b>+3.2 %</b>

Food for other pets	2004 mio. Euros	Change with respect to previous year
<b>Main food/Snacks Total</b>	<b>98*</b>	<b>+3.2 %</b>

\* Value can be compared to 2002 under certain conditions only

## Sales of Accessories

Supply for	2004 mio. Euros	Change with respect to previous year
Dogs	118	
Cats	141	
Cat litter	184	
Ornamental birds	51	
Ornamental fish	196	
Small pets	70	
<b>Total</b>	<b>760</b>	<b>- 0.1 %</b>

## Sales according to channels of distribution

Food ready to eat	2004 mio. Euros	Per cent
LEH / chemistry markets / discounters / Aldi	1,442	67 %
Specialised trade / pet department	710	33 %
<b>Total</b>	<b>2,152</b>	<b>100 %</b>

Pet articles	2004 mio. Euros	Per cent
LEH / chemistry markets / discounters / Aldi	106	14 %
Specialised trade / pet department	654	86 %
<b>Total</b>	<b>760</b>	<b>100 %</b>

[LEH = food retailer)

## Sales of Pet Food according to Channels of Distribution

(Food for ornamental fish and reptiles not included)

Channel of distribution	2003 Sales in mio. Euros	2004 Sales in mio. Euros	Change in per cent
LEH incl. chemistry markets and Aldi	1,588.5	1,525.7	-4
Trad. LEH with less than 800 sqm	156.8	136.9	-12.7
LEH with more than 800 sqm	651.6	620.5	-4.8
Soft-Discounters	166.2	166.4	+0.1
Hard-Discounters incl. Aldi	333.1	325.1	-2.4
Chemistry markets	280.8	276.8	-1.4
Big pet shop markets	431.4	439.5	+1.9
Small pet shops	173.2	155.3	-10.3
Do-it-yourself markets / Garden markets	113.3	114.6	+1.1
Land-born trade	60.2	56.9	-5.5

Source: IRI

## Sales of Pet Food in Tons according to Channels of Distribution

(Food for ornamental fish and reptiles not included)

Channel of distribution	2003 in mio. tons	2004 in mio. tons	Change in per cent
Trad. LEH with less than 800 sqm	90.9	83.4	-8.2
LEH with more than 800 sqm	408.3	405.7	-0.7
Soft-Discounters	1508	159.8	+6
Hard-Discounters incl. Aldi	281.6	271	-3.8
Chemistry markets	151	156.4	+3.6
Big pet shop markets	222.2	230.7	+3.8
Small pet shops	65.4	59.6	-8.9
Do-it-yourself markets / Garden markets	68.6	68.7	+0.2
Land-born trade	37.7	33.5	-11.1

Source: IRI

Sources: Industrieverband Heimtierbedarf (IVH) (industrial association pet supply), Gesellschaft für Konsumforschung (GfK) (Organisation for consumer research), Information Resources Inc. (IRI), Member companies of the Zentralverband Zoologischer Fachbetriebe e.V. (ZZF), No responsibility can be taken for the correctness of this information