

2023

THE GERMAN **PET MARKET**

Structure & Sales Data



Pet Care Market

Pet Care Market Total

	Bricks & Mortar Trade		Online		Food for Wild Birds	
	Million €	Change ²	Million €	Change ²	Million €	Change ²
Prepared pet food ¹	4,495	+ 11.4 %				
Pet accessories	1,121	+ 2.7 %				
Total	5,616	+ 9.5 %	1,316	+ 9.4 %	161	+ 1.9 %
			Total		7,093	
			(Bricks & Mortar Trade + Online + Food for Wild Birds)			

Market for Prepared Pet Food

		Bricks & Mortar Trade		
		Million €	Change ²	
Dog Food				
	Wet food	677	+ 13.7 %	
	Dry food ³	547	+ 6.1 %	
	Snacks	748	+ 7.4 %	
	Total	1,972	+ 9.1 %	
	Cat Food			
	Wet food	1,532	+ 15.3 %	
	Dry food	396	+ 11.3 %	
	Snacks / Cat milk	372	+ 14.0 %	
	Total	2,300	+ 14.4 %	
Pet Bird Food				
	Complete food	48	+ 9.4 %	
	Snacks / Complementary food	26	+ 12.0 %	
	Total	74	+ 10.3 %	
Ornamental Fish Food				
	Complete food / Snacks (incl. pond food)	60	+ 1.1 %	
	Total	60	+ 1.1 %	
Food for Small Animals				
	Complete food / Snacks	89	- 1.9 %	
	Total	89	- 1.9 %	
		Total	4,495	+ 11.4 %

Turnover figures based on consumer prices

¹⁾ without bulk food

²⁾ Changes versus 2022







³⁾ incl. semi-moist food

⁴⁾ Food retail incl. drugstores & discounters

⁵⁾ Pet shops, agricultural trade, garden centres, DIY stores, etc.

Market for Pet Accessories

Bricks & Mortar Trade

	Million €	Change ²
 Dogs	225	- 1.6 %
 Cats	241	+ 7.3 %
 Cat litter	351	+ 8.6 %
 Pet birds	30	+ 0.4 %
 Ornamental fish	178	- 7.0 %
 Small animals	96	+ 3.5 %
Total	1,121	+ 2.7 %

Turnover by Sales Channel

Prepared Pet Food

Food retail ⁴	63 %	2,832 Million €
Specialized trade ⁵	37 %	1,663 Million €
Total		4,495 Million €

Pet Accessories

Food retail ⁴	22 %	247 Million €
Specialized trade ⁵	78 %	874 Million €
Total		1,121 Million €

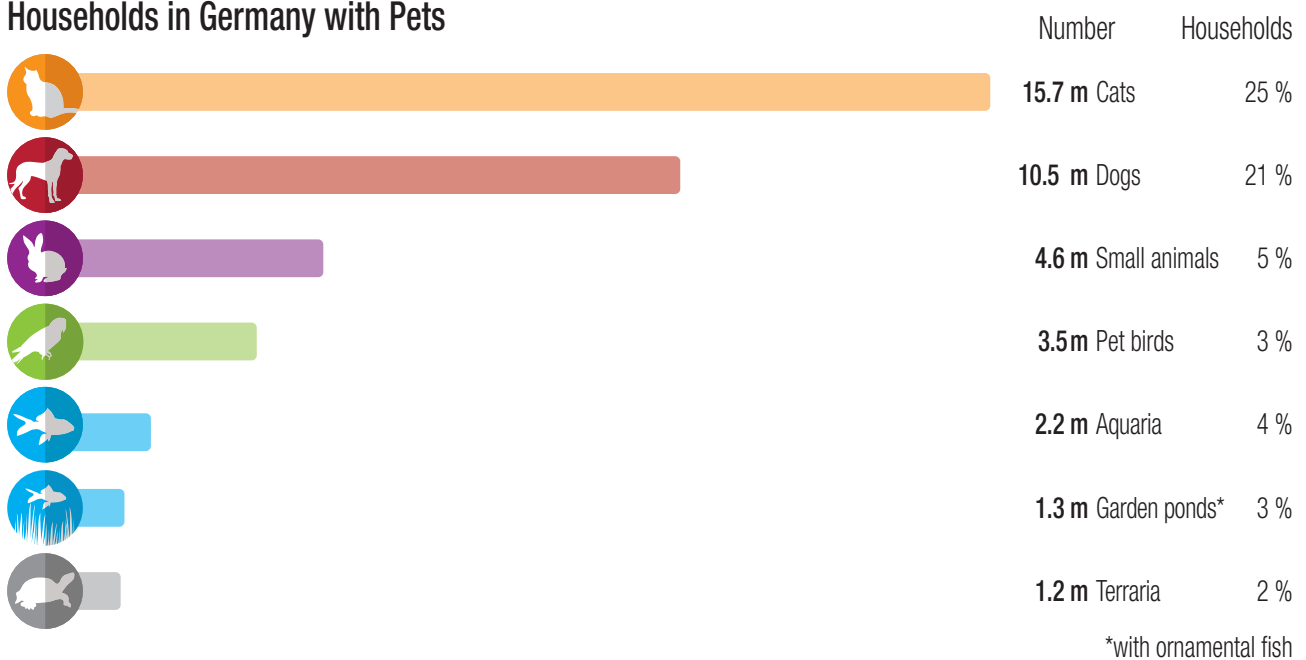
Information on Sales Channel “Online”

Regarding pet care products, the internet is gaining in importance. According to estimates by experts from the industry and trade, the online sales volume in **2023 amounted to approximately 1,316 million euros**. As yet, no differentiated, species-specific data on the online market is available.

Pet Population

34.3 million pets (excl. fish and reptiles) live in households in Germany.
45 percent of all households own at least one pet.

Households in Germany with Pets

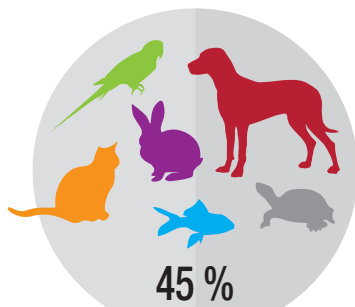


Households with Pets

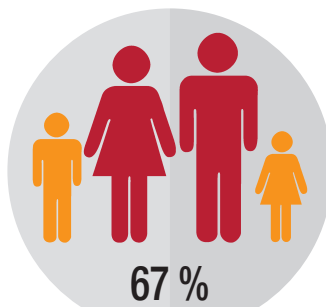
Size of Household



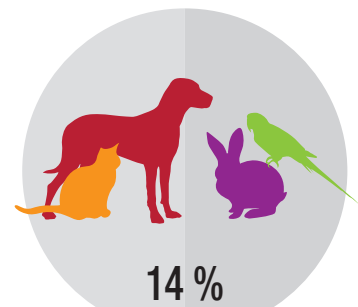
Age



of all households in Germany own at least one pet.



of all families with children own a pet.



of all households own at least 2 types of pets.

Market data was provided by IVH and ZZF member companies.

The population figures were collected on behalf of IVH and ZZF in a separate survey (basis: representative survey among 5,000 households).



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