

2017

THE GERMAN PET MARKET

Structure and Sales Data

IVH
Industrieverband
Heimtierbedarf (IVH) e.V.



ZZF
Zentralverband
Zoologischer
Fachbetriebe
Deutschlands e.V.



Pet Care Market 2017

Pet Care Market Total

	Bricks & Mortar Trade Million €	Change**	Online Million €	Food for wild birds Million €
Prepared pet food*	3,173	+ 0.1 %		
Pet accessories	987	+ 1.0 %		
Total	4,160	+ 0.3 %	580	98
Total (Bricks & Mortar Trade + Online + Food for wild birds)				4,838

Market for Prepared Pet Food

Dog Food

	Bricks & Mortar Trade Million €	Change**
Wet food	445	+ 3.0 %
Dry food ***	426	- 0.2 %
Snacks	513	+ 3.6 %
Total	1,384	+ 2.2 %

Cat Food

Wet food	1,055	- 1.5 %
Dry food	298	+ 0.7 %
Snacks	230	- 2.1 %
Total	1,583	- 1.2 %

Bird Food

Complete & complementary food****	42	- 2.3 %
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Fish Food

Complete & complementary food (incl. pond food)	54	- 3.6 %
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Other pet food

Compound food/snacks	110	- 4.3 %
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Total	3,173	+ 0.1 %
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Turnover figures based on consumer prices







* without bulk food

** Changes versus 2016

*** incl. semi-moist food

**** additionally 98 m € food for wild birds

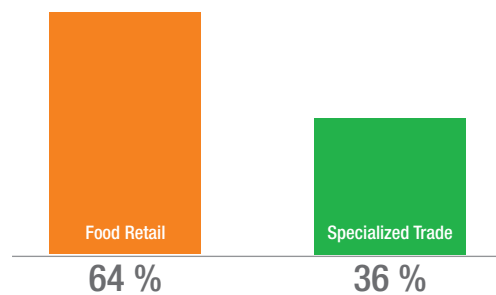
Market for Pet Accessories

		Bricks & Mortar Trade	
		Million €	Change*
	Dogs	192	+ 5.5 %
	Cats	198	+ 3.1 %
	Cat litter	286	+ 0.7 %
	Pet Birds	34	- 2.9 %
	Ornamental fish	178	- 2.2 %
	Small animals	99	- 2.9 %
Total		987	+ 1.0 %

Turnover by Sales Channel

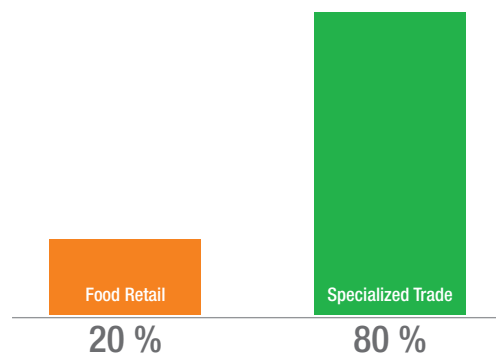
Prepared pet food

	Million €	%
Food Retail**	2,031	64 %
Specialized Trade***	1,142	36 %
Total	3,173	100 %



Pet accessories

	Mio €	%
Food Retail**	197	20 %
Specialized Trade***	790	80 %
Total	987	100 %



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 2017 amounted to approximately 580 million euros. As yet, no differentiated, species-specific data on the online market for "prepared pet food" as well as "pet accessories" is available.

Turnover figures based on consumer prices

* Changes versus 2016

** Food Retail incl. drugstores & discounters

*** Pet shops, agricultural trade, garden centres, DIY stores, etc.

IVH

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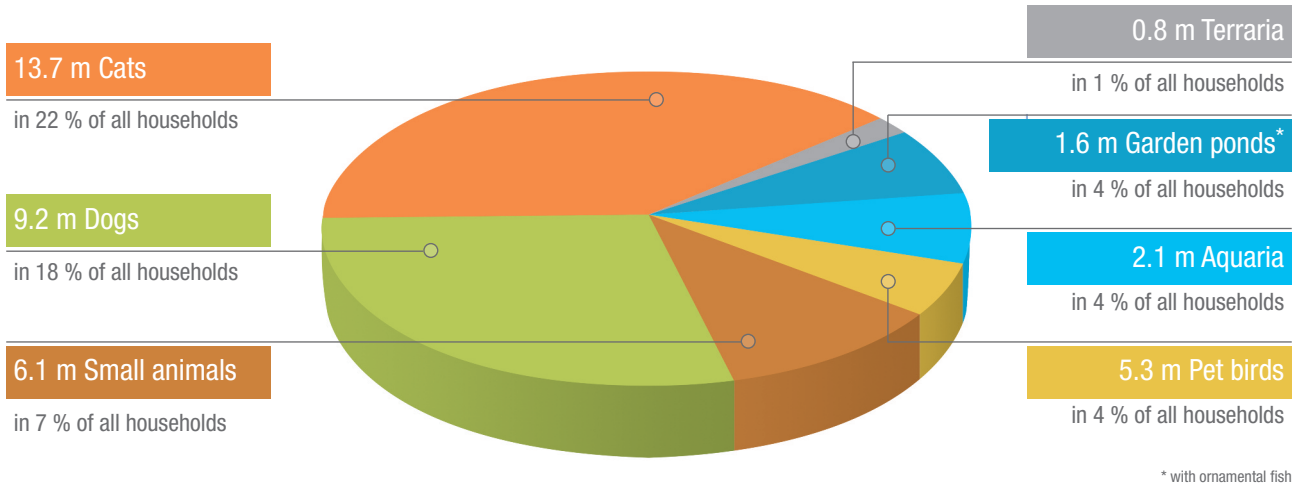


Zentralverband
Zoologischer
Fachbetriebe
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Pet Population

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

1 person	30 %
2 persons	35 %
3 persons or more	35 %

Age

Up to 29 years	15 %
30 to 39 years	19 %
40 to 49 years	19 %
50 to 59 years	21 %
60 years and older	26 %

45 % of all households in Germany own at least one pet.



65 % of all families with children own a pet.



21 % of all households with pets own at least 2 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.

IVH

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