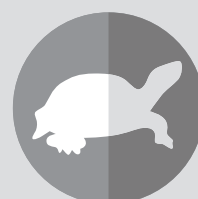


THE GERMAN PET MARKET

Structure and
Sales Data **2020**



IVH

Industrieverband
Heimtierbedarf (IVH) e.V.








Pet Care Market

Pet Care Market Total

	Bricks & Mortar Trade		Online	Food for Wild Birds
	Million €	Change ²	Million €	Million €
Prepared pet food ¹	3,460	+ 4.6 %		
Pet accessories	1,053	+ 3.5 %		
Total	4,513	+ 4.3 %	822	128
			Total	5,463
			(Bricks & Mortar Trade + Online + Food for Wild Birds)	

Market for Prepared Pet Food

		Bricks & Mortar Trade	
		Million €	Change ²
Dog Food			
	Wet food	502	+ 3.1%
	Dry food ³	463	+ 2.4%
	Snacks	602	+ 6.0%
	Total	1,567	+ 4.0%
Cat Food			
	Wet food	1,105	+ 5.0%
	Dry food	307	+ 2.7%
	Snacks / Cat milk	268	+ 9.4%
	Total	1,680	+ 5.3%
Pet Bird Food			
	Complete food	45	+ 2.3%
	Snacks / Complementary food	22	+ 4.8%
	Total	67	+ 3.1%
Ornamental Fish Food			
	Complete food / Snacks (incl. pond food)	55	+ 3.8%
	Total	55	+ 3.8%
Other Pet Food			
	Complete food / Snacks	91	+ 4.6%
	Total	91	+ 4.6%
	Total	3,460	+ 4.6%

Turnover figures based on consumer prices

¹⁾ without bulk food

²⁾ Changes versus 2019







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	+ 4.7%
 Cats	218	+ 4.8%
 Cat litter	292	+ 2.8%
 Pet birds	33	+ 3.1%
 Ornamental fish	190	+ 2.7%
 Small animals	95	+ 2.2%
Total	1,053	+ 3.5%

Turnover by Sales Channel

Prepared Pet Food

Food retail ⁴	61%	2,120 Million €
Specialized trade ⁵	39%	1,340 Million €
Total		3,460 Million €

Pet Accessories

Food retail ⁴	21%	218 Million €
Specialized trade ⁵	79%	835 Million €
Total		1,053 Million €

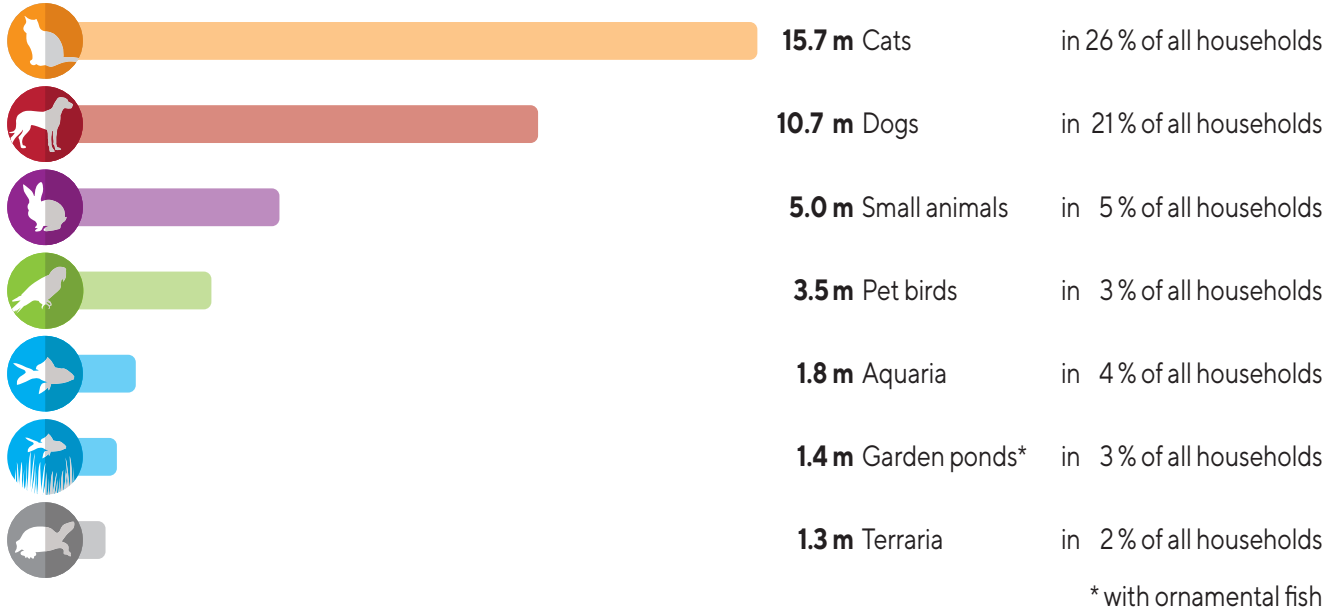
Information on Sales Channel "Online"

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 **2020 amounted to approximately 822 million euros**. As yet, no differentiated, species-specific data on the online market is available.

Pet Population

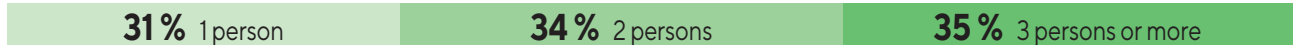
34.9 million pets (excl. fish and reptiles) live in households in Germany. 47 percent of all households own at least one pet.

Households in Germany with Pets

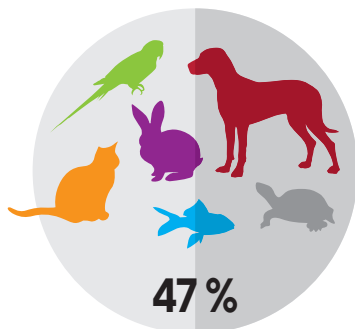
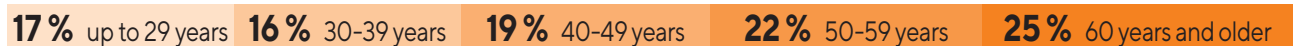


Households with Pets

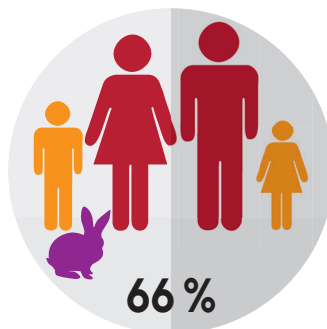
Size of Household



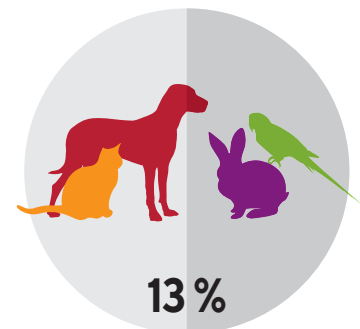
Age



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 7,000 households).

