

THE GERMAN  
PET MARKET

2018

Structure and Sales Data

**IVH**  
Industrieverband  
Heimtierbedarf (IVH) e.V.



**ZZF**  
Zentralverband  
Zoologischer  
Fachbetriebe  
Deutschlands e.V.



# Pet Care Market 2018

## Pet Care Market Total

	Bricks & Mortar Trade Million €	Change <sup>2</sup>	Online Million €	Food for wild birds Million €
Prepared pet food <sup>1</sup>	3,226	+ 1.7 %		
Pet accessories	997	+ 1.0 %		
<b>Total</b>	<b>4,223</b>	<b>+ 1.5 %</b>	<b>625</b>	<b>100</b>
<b>Total</b> (Bricks & Mortar Trade + Online + Food for wild birds)				<b>4,948</b>

## Market for Prepared Pet Food

### Dog Food

	Bricks & Mortar Trade Million €	Change <sup>2</sup>
Wet food	473	+ 6.3 %
Dry food <sup>3</sup>	435	+ 2.1 %
Snacks	538	+ 4.9 %
<b>Total</b>	<b>1,446</b>	<b>+ 4.5 %</b>

### Cat Food

Wet food	1,040	- 1.4 %
Dry food	299	+ 0.3 %
Snacks	238	+ 3.5 %
<b>Total</b>	<b>1,577</b>	<b>- 0.4 %</b>

### Bird Food

Complete & complementary food	66	+ 1.5 %
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### Fish Food

Complete & complementary food (incl. pond food)	52	- 3.7 %
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### Other pet food

Compound food/snacks	85	- 2.3 %
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<b>Total</b>	<b>3,226</b>	<b>+ 1.7 %</b>
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Turnover figures based on consumer prices

<sup>1)</sup> without bulk food







<sup>2)</sup> Changes versus 2017

<sup>3)</sup> incl. semi-moist food

<sup>4)</sup> Food Retail incl. drugstores & discounters

<sup>5)</sup> Pet shops, agricultural trade, garden centres, DIY stores, etc.

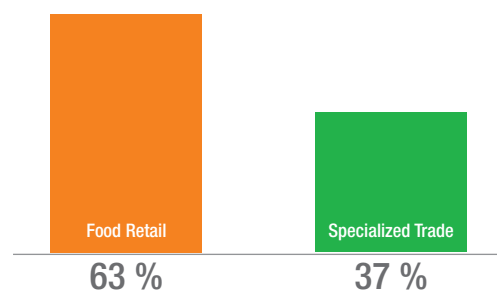
## Market for Pet Accessories

	Bricks & Mortar Trade	
	Million €	Change <sup>2</sup>
 Dogs	202	+ 5.2 %
 Cats	204	+ 3.0 %
 Cat litter	282	- 1.4 %
 Pet Birds	32	- 5.9 %
 Ornamental fish	182	+ 2.2 %
 Small animals	95	- 4.0 %
<b>Total</b>	<b>997</b>	<b>+ 1.0 %</b>

## Turnover by Sales Channel

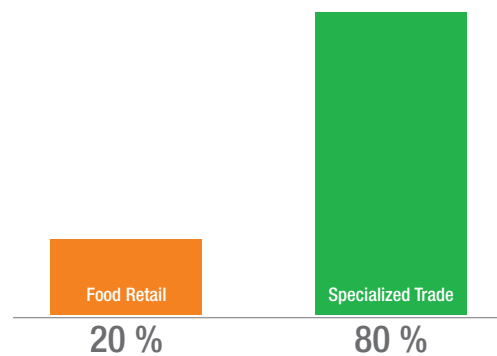
### Prepared pet food

	Million €	%
Food Retail <sup>4</sup>	2,046	63 %
Specialized Trade <sup>5</sup>	1,180	37 %
<b>Total</b>	<b>3,226</b>	<b>100 %</b>



### Pet accessories

	Million €	%
Food Retail <sup>4</sup>	202	20 %
Specialized Trade <sup>5</sup>	795	80 %
<b>Total</b>	<b>997</b>	<b>100 %</b>



## 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 2018 amounted to approximately 625 million euros. As yet, no differentiated, species-specific data on the online market for “prepared pet food” as well as “pet accessories” is available.

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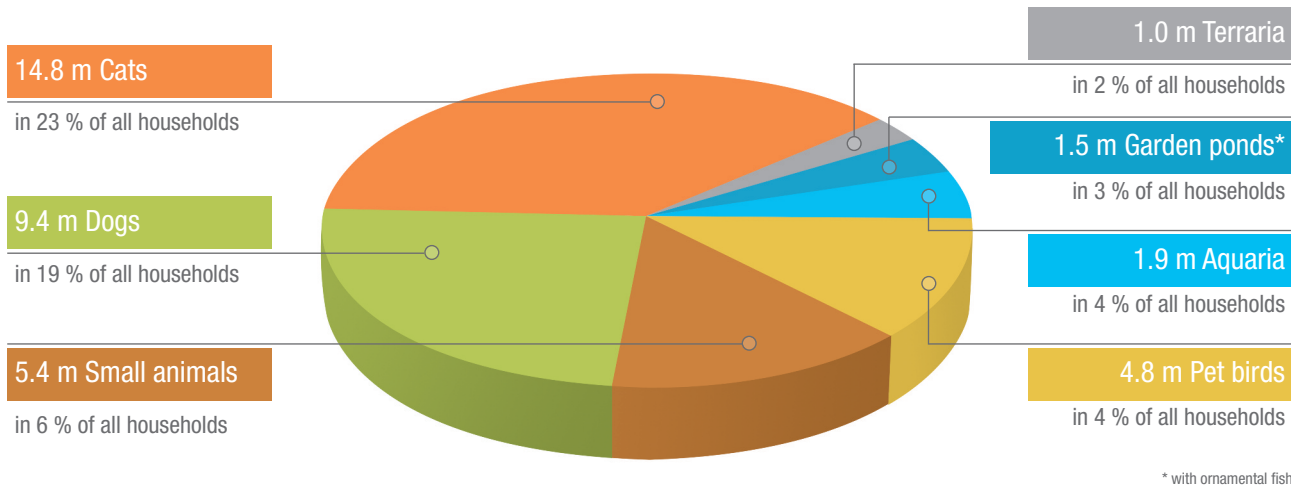


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# Pet Population

34.4 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	32 %
2 persons	34 %
3 persons or more	34 %

### Age

Up to 29 years	15 %
30 to 39 years	17 %
40 to 49 years	19 %
50 to 59 years	22 %
60 years and older	27 %

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



63 % of all families with children own a pet.



22 % 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 (basis: representative survey among 7,000 households).

**IVH**

Industrieverband  
Heimtierbedarf (IVH) e.V.



Industrieverband Heimtierbedarf (IVH) e. V.  
Emanuel-Leutze-Str. 11 | 40547 Düsseldorf  
Telefon: 0211 - 594074  
Telefax: 0211 - 596045  
E-Mail: info@ivh-online.de



Zentralverband Zoologischer  
Fachbetriebe Deutschlands e.V.  
Mainzer Str. 10 | 65185 Wiesbaden  
Telefon: 0611 - 447553-0  
Telefax: 0611 - 447553-33  
E-Mail: info@zzf.de