

2016

THE GERMAN PET MARKET

Structure and Sales Data

IVH
Industrieverband
Heimtierbedarf (IVH) e.V.



ZZF
Zentralverband
Zoologischer
Fachbetriebe
Deutschlands e.V.



Pet Care Market 2016

Pet Care Market Total

	Bricks & Mortar Trade		Online
	Million €	Change**	Million €
Prepared pet food*	3,170	+ 0.4 %	
Pet accessories	977	+ 2.5 %	
Total	4,147	+ 0.9 %	510
Total (Bricks & Mortar Trade + Online)			4,657

Market for Prepared Pet Food

Dog Food

	Bricks & Mortar Trade	
	Million €	Change**
Wet food	432	+ 4.1 %
Dry food***	427	- 0.5 %
Snacks	495	+ 3.3 %
Total	1,354	+ 2.3 %

Cat Food

Wet food	1,071	- 0.4 %
Dry food	296	+/- 0.0 %
Snacks	235	- 1.7 %
Total	1,602	- 0.5 %

Bird Food

Complete & complementary food****	43	- 2.3 %
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Fish Food

Complete & complementary food (incl. pond food)	56	- 6.7 %
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Other pet food

Compound food/snacks	115	- 4.2 %
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Total	3,170	+ 0.4 %
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Turnover figures based on consumer prices







* without bulk food

** Changes versus 2015

*** incl. semi-moist food

*** without food for wild birds

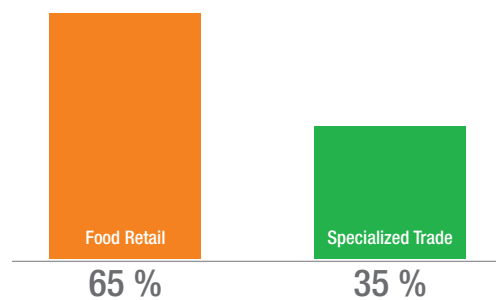
Market for Pet Accessories

	Bricks & Mortar Trade	
	Million €	Change*
 Dogs	182	+ 6.4 %
 Cats	192	+ 3.8 %
 Cat litter	284	+ 5.6 %
 Pet Birds	35	- 7.9 %
 Ornamental fish	182	- 1.6 %
 Small animals	102	- 2.9 %
Total	977	+ 2.5 %

Turnover by Sales Channel

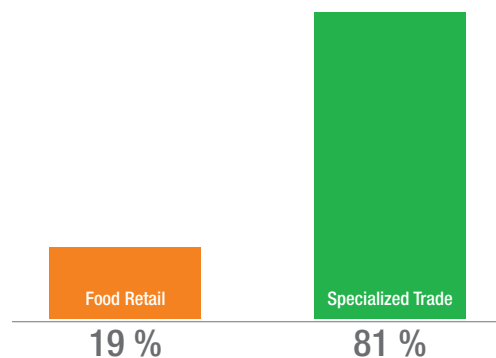
Prepared pet food

	Million €	%
Food Retail**	2,076	65 %
Specialized Trade***	1,094	35 %
Total	3,170	100 %



Pet accessories

	Million €	%
Food Retail**	187	19 %
Specialized Trade***	790	81 %
Total	977	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 2016 amounted to approximately 510 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 2014

** Food Retail incl. drugstores & discounters

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

IVH

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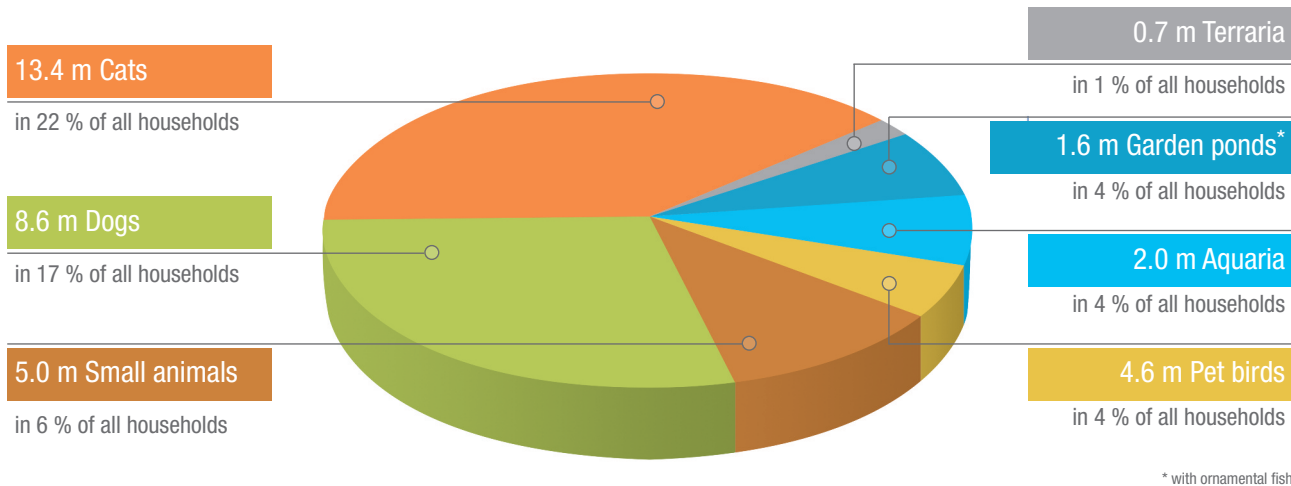


Zentralverband
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Pet Population

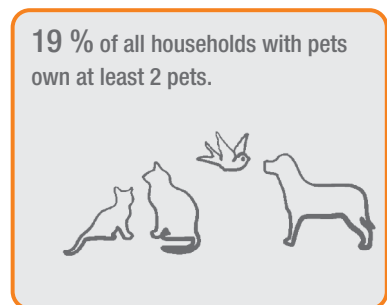
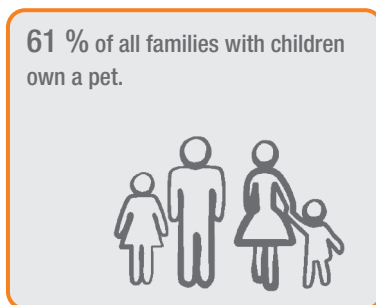
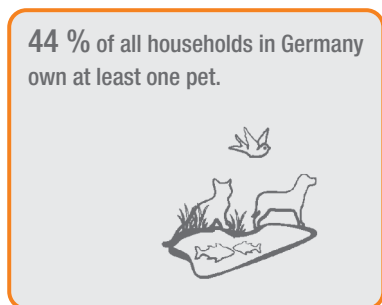
31.6 million pets (excl. fish and reptiles) live in households in Germany. 44 percent of all households own at least one pet.

Households in Germany with Pets



Households with Pets

Size of households



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.