

THE GERMAN PET MARKET

Structure & Sales Data

2024

ZZF



Zentralverband
Zoologischer
Fachbetriebe
Deutschlands e.V.



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 €	Change ²	Million €	Change ²
Prepared pet food ¹	4,259	+ 1.3 %				
Pet accessories	1,114	- 0.6 %				
Total	5,373	+ 0.9 %	1,512	+ 14.9 %	145	- 9.9 %
			Total		7.030	

(Bricks & Mortar Trade, Online and Food for Wild Birds)

Market for Prepared Pet Food

Dog Food



	Bricks & Mortar Trade	
	Million €	Change ²
Wet food	593	- 2.0 %
Dry food ³	414	- 2.8 %
Snacks	752	+ 1.5 %
Total	1,759	- 0.7 %

Cat Food



Wet food	1,539	+ 2.9 %
Dry food	377	+ 5.9 %
Snacks/Cat milk	369	+ 3.9 %
Total	2,285	+ 3.5 %

Pet Bird Food



Complete food	47	- 2.1 %
Snacks/Complementary food	24	- 7.7 %
Total	71	- 4.1 %

Ornamental Fish Food



Complete food/Snacks (incl. pond food)	62	+ 3.3 %
Total	62	+ 3.3 %

Food for Small Animals



Complete food/Snacks	82	- 7.9 %
Total	82	- 7.9 %

Total **4,259** **+ 1.3 %**

Turnover figures based on consumer prices

¹⁾ without bulk food







²⁾ Changes versus 2023

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	214	- 4.9 %
	Cats	242	+ 0.4 %
	Cat litter	376	+ 7.1 %
	Pet Birds	27	-10.0 %
	Ornamental Fish	167	- 6.2 %
	Small animals	88	- 8.3 %
Total		1,114	- 0.6 %

Turnover by Sales Channel

Prepared Pet Food

Food retail ⁴	65 %	2,768 Million €
Specialized trade ⁵	35 %	1,491 Million €
Total		4,259 Million €

Pet Accessories

Food retail ⁴	23 %	256 Million €
Specialized trade ⁵	77 %	858 Million €
Total		1,114 Million €

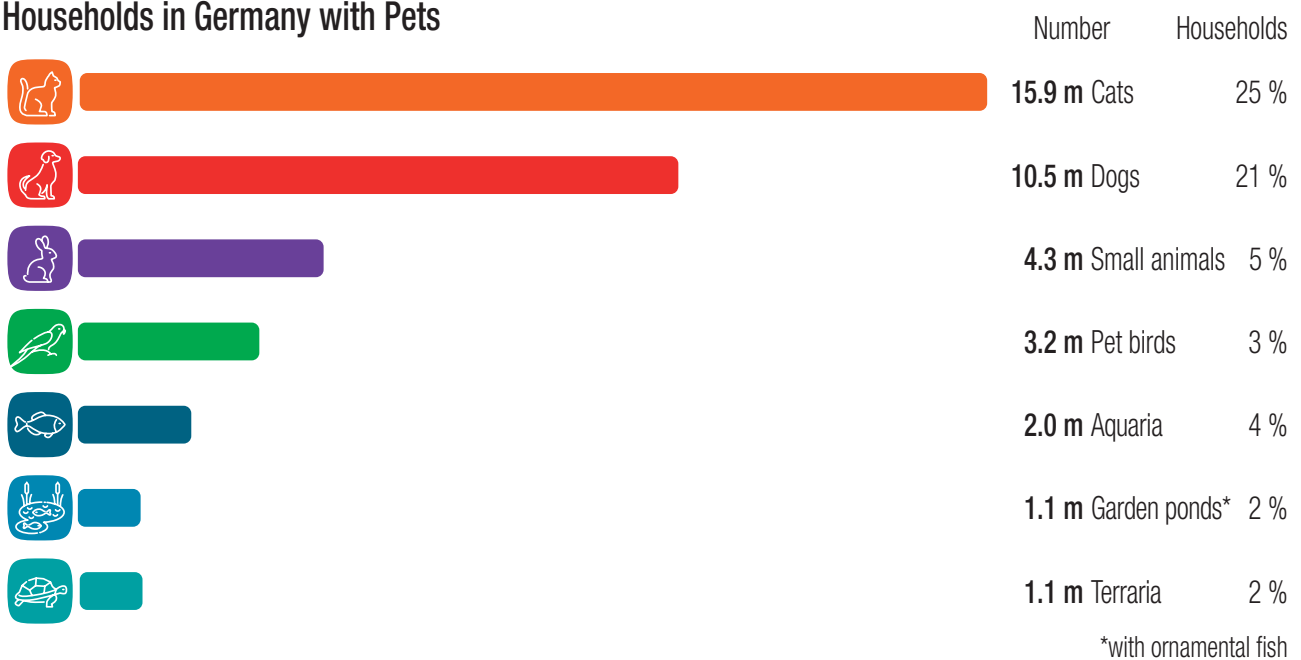
Online Sales

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 **2024 amounted to approximately 1,512 million euros**. As yet, no differentiated, species-specific data on the online market is available.

Pet Population

33.9 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

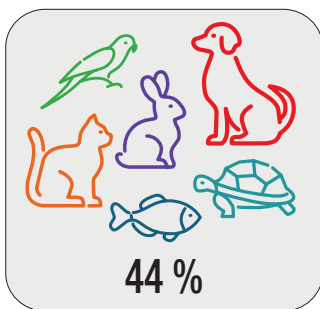


Households with Pets

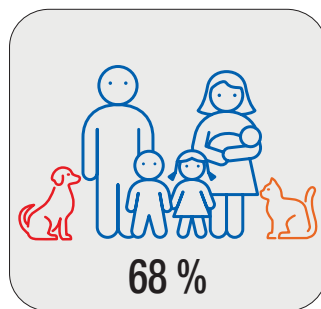
Size of Household



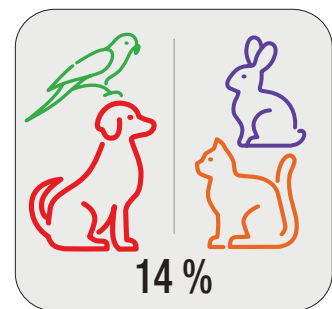
Age



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 based on a modified database.
Any direct comparison with the corresponding data for 2023 is therefore only possible to a limited extent.
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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