

2008
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The German Pet Market

Structure & Sales Data

Pet Care Market 2008

Total Sales in Pet Care Market

	Million €	Change*
Complete pet food	2,594	+ 4.6 %
Pet supplies & accessories	906	+ 3.9 %

TOTAL MARKET

3,500

+ 4.4 %

Market for complete pet food



Dog food

	Million €	Change*
Wet food	350	+ 2.3 %
Dry food**	391	+ 4.5 %
Snacks	296	+ 3.5 %
TOTAL	1,037	+ 3.5 %



Cat food

Wet food	877	+ 3.8 %
Dry food	281	+ 11.5 %
Snacks	153	+ 11.7 %
TOTAL	1,311	+ 6.3 %



Bird food

Complete/main/supplementary food***	58	+ 1.8 %
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Fish food

Complete/main/supplementary food (incl. pond food)	70	- 1.4 %
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Other pet food

Main food/snacks	118	+ 0.9 %
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TOTAL

2,594




+ 4.6 %

* Changes versus 2007

** Incl. semi-moist food

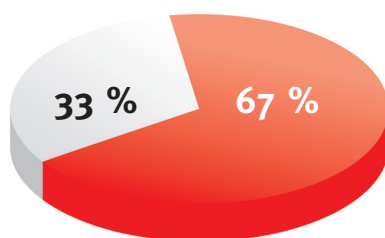
*** Plus approx. € 15 million in winter and bulk food at breeders

Market for Pet Supplies

	Million €	Change*
 Dogs	146	+ 4.3 %
 Cats	172	+ 6.2 %
 Cat litter	218	+ 6.3 %
 Pet birds	46	+ 2.2 %
 Ornamental fish	220	- 0.9 %
 Small animals	104	+ 6.1 %
TOTAL	906	+ 3.9 %

Turnover by Sales Channel

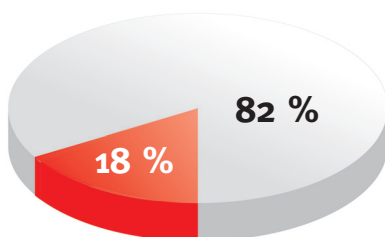
Complete meal pet food



Million €

Retail**	1,744	67 %
Specialty trade***	850	33 %
TOTAL	2,594	100 %

Pet supplies

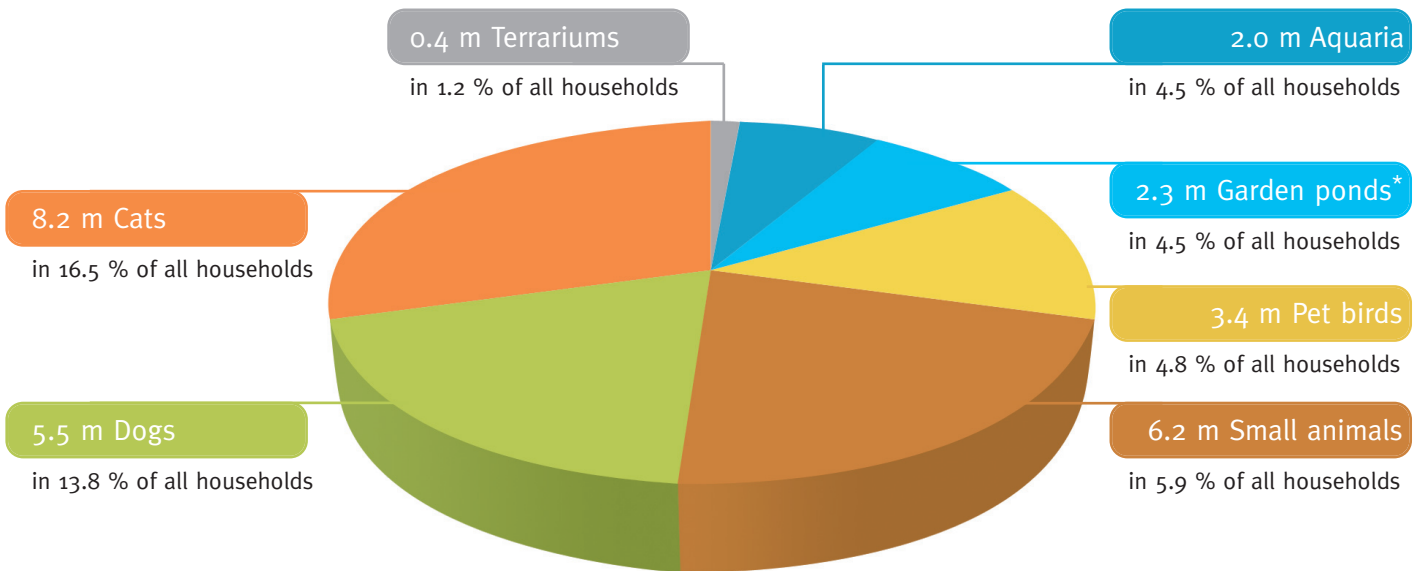


Retail**	159	18 %
Specialty trade***	747	82 %
TOTAL	906	100 %

Pet Care

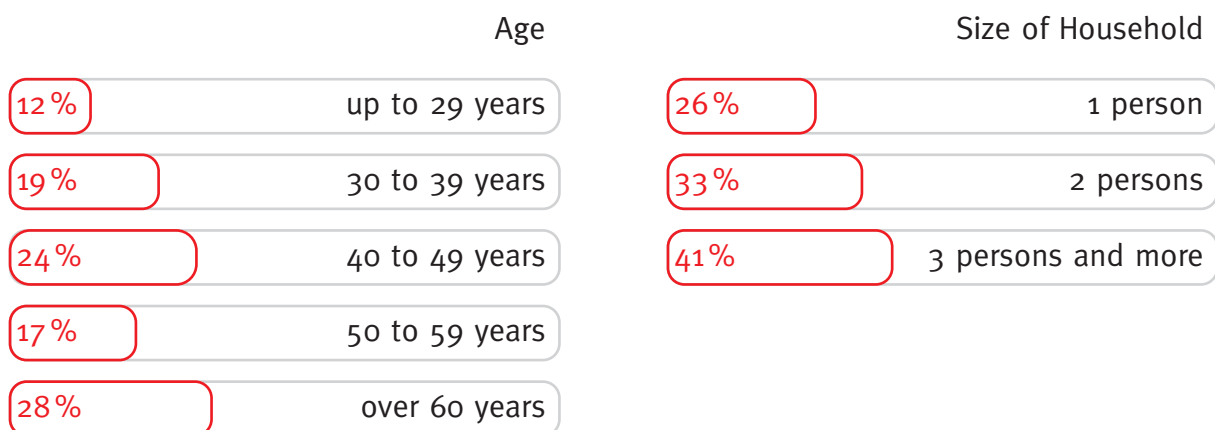
23.3 million pets (excl. fish and terrarium animals) live in German households. More than one third of all households in Germany have at least one pet.

German Households with Pets



* with ornamental fish

Socio-demographic Profile of Households with Pets



Market data was collected by IVH member companies based on an extended database. Therefore, direct comparison with IVH data for 2007 is possible only to a limited extent.

The population figures and the socio-demographic profile of households with pets were collected on behalf of IVH in a separate survey.

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