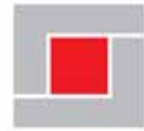
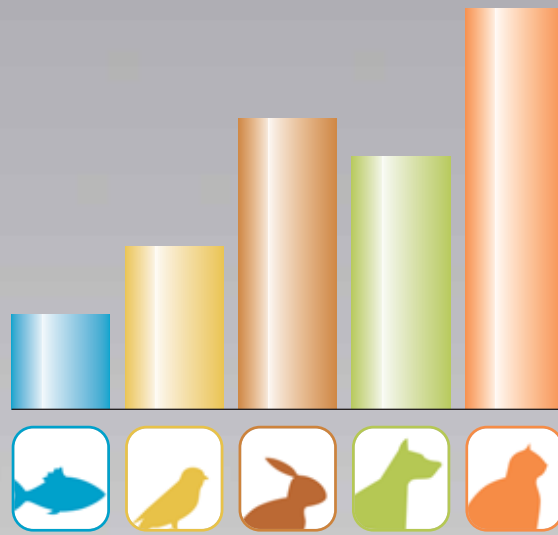


IVH



Industrieverband
Heimtierbedarf (IVH) e.V.



2009

The German Pet Market

Structure & Sales Data

Pet Care Market 2009

Total Sales in Pet Care Market

	Million €	Change*
Complete pet food	2,694	+ 2.9 %
Pet supplies & accessories	909	+ 0.2 %

TOTAL MARKET

3,603

+ 2.2 %

Market for Complete Pet Food



Dog food

	Million €	Change*
Wet food	353	+ 0.6 %
Dry food**	410	+ 2.5 %
Snacks	308	+ 4.4 %
TOTAL	1,071	+ 2.4 %



Cat food

Wet food	915	+ 3.0 %
Dry food	297	+ 6.1 %
Snacks	164	+ 6.5 %
TOTAL	1,376	+ 4.1 %



Bird food

Complete/main/supplementary food***	56	- 3.4 %
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Fish food

Complete/main/supplementary food (incl. pond food)	68	- 2.9 %
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Other pet food

Main food/snacks	123	+ 0.8 %
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TOTAL

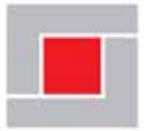
2,694

+ 2.9 %







* Changes versus 2008

** Incl. semi-moist food

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



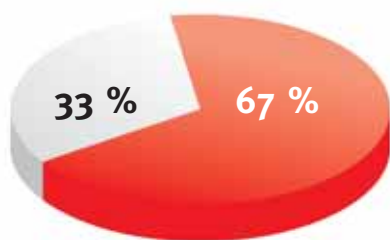
Market for Pet Supplies

	Million €	Change*
 Dogs	150	+ 2.7 %
 Cats	179	+ 4.1 %
 Cat litter	222	+ 1.4 %
 Pet birds	44	- 4.3 %
 Ornamental fish	209	- 5.0 %
 Small animals	105	+ 1.0 %
TOTAL	909	+ 0.2 %

Turnover by Sales Channel

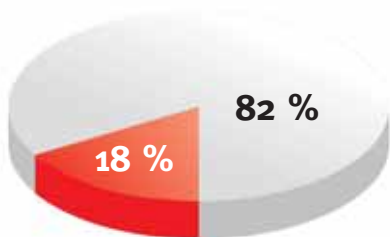
Complete meal pet food

Million €



Retail**	1,798	67 %
Specialty trade***	896	33 %
TOTAL	2,694	100 %

Pet supplies

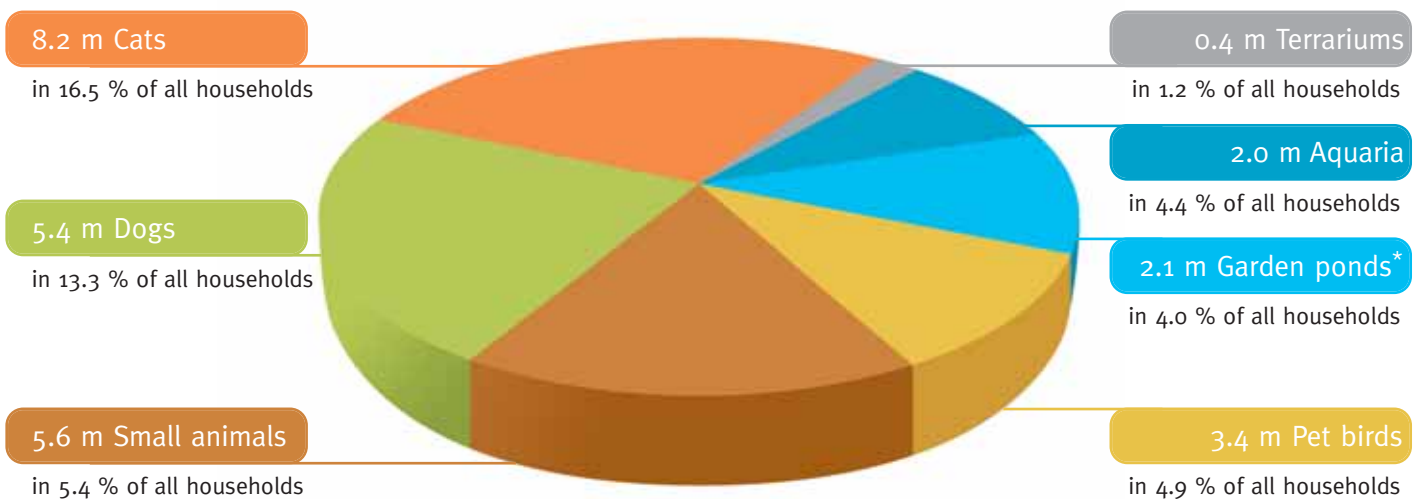


Retail**	160	18 %
Specialty trade***	749	82 %
TOTAL	909	100 %

Pet Care

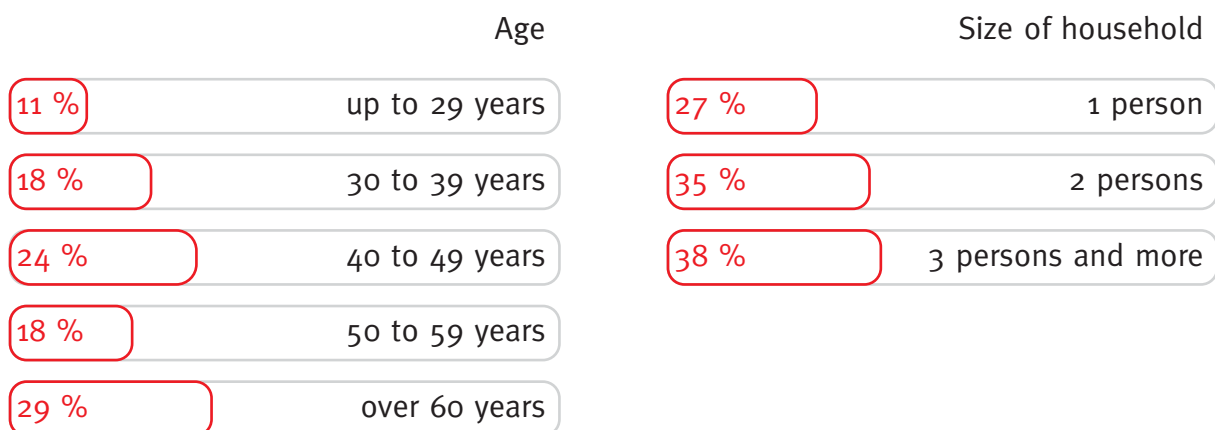
22.6 million pets (excl. fish and terrarium animals) live in German households. More than one third of all households in Germany have at least one pet.

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 2008 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.

Legal notice:

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