



THE GERMAN PET MARKET

Structure & Sales Data




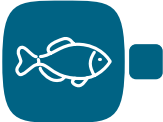

2025

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	4,272	+ 0.3 %				
Pet accessories	1,063	- 4.6 %				
Total	5,335	- 0.7 %	1,521	+ 0.6 %	134	- 7.6 %
			Total		6,990	
			(Bricks & Mortar Trade, Online and Food for Wild Birds)			

Market for Prepared Pet Food

	Bricks & Mortar Trade	
	Million €	Change ²
Dog Food		
		
Wet food	582	- 1.9 %
Dry food ³	403	- 2.7 %
Snacks	768	+ 2.1 %
Total	1,753	- 0.3 %
Cat Food		
		
Wet food	1,556	+ 1.1 %
Dry food	379	+ 0.5 %
Snacks/Cat milk	380	+ 3.0 %
Total	2,315	+ 1.3 %
Pet Bird Food		
		
Complete food	45	- 3.8 %
Snacks/Complementary food	23	- 3.5 %
Total	68	- 3.7 %
Ornamental Fish Food		
		
Complete food/Snacks (incl. pond food)	60	- 3.2 %
Total	60	- 3.2 %
Food for Small Animals		
		
Complete food/Snacks	76	- 7.3 %
Total	76	- 7.3 %
Total	4,272	+ 0.3 %

Turnover figures based on consumer prices

¹⁾ without bulk food







²⁾ Changes versus 2024

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	200	- 6.5 %
	Cats	230	- 5.0 %
	Cat litter	370	- 1.6 %
	Pet Birds	24	- 11.1 %
	Ornamental Fish	160	- 4.2 %
	Small animals	79	- 10.2 %
Total		1,063	- 4.6 %

Turnover by Sales Channel

Prepared Pet Food

Food retail ⁴	66 %	2,820 Million €
Specialized trade ⁵	34 %	1,452 Million €
Total		4,272 Million €

Pet Accessories

Food retail ⁴	24 %	255 Million €
Specialized trade ⁵	76 %	808 Million €
Total		1,063 Million €

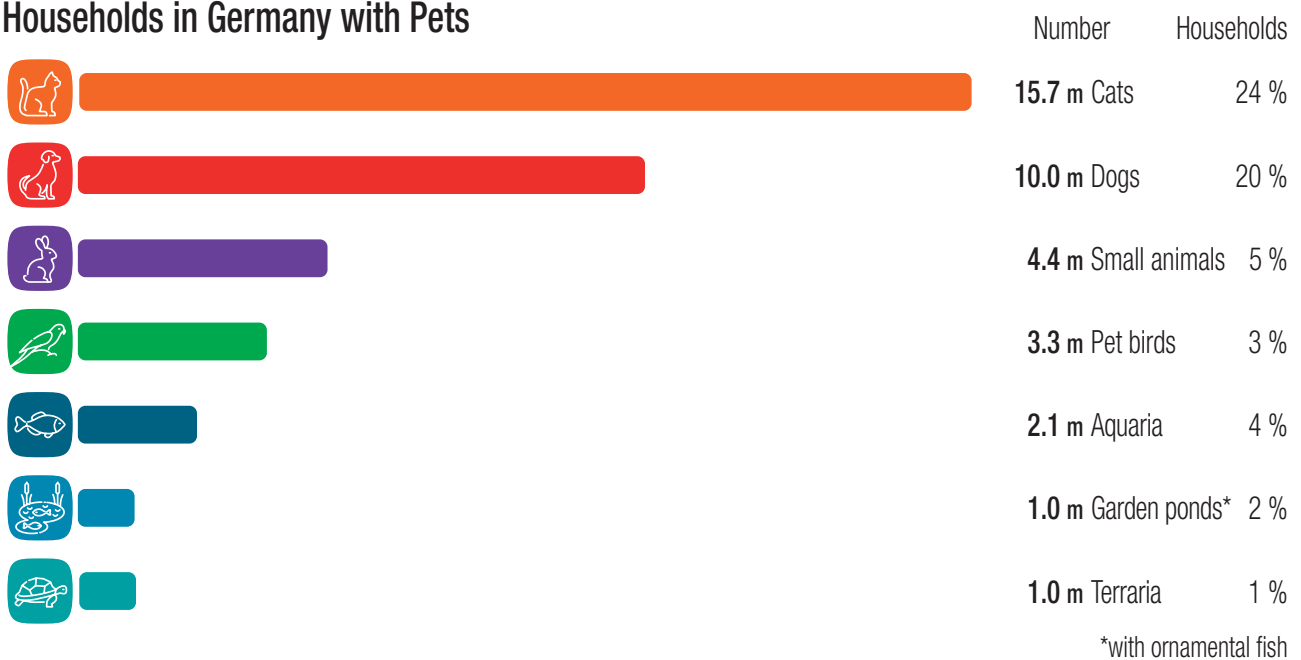
Online Sales

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 **2025 amounted to approximately 1,521 million euros**. As yet, no differentiated, species-specific data on the online market is available.

Pet Population

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

Households in Germany with Pets

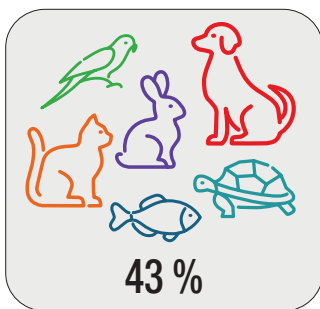


Households with Pets

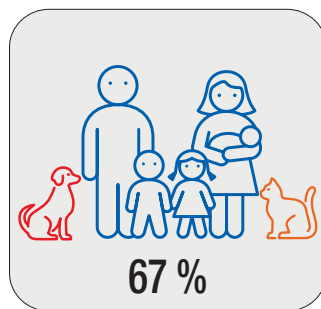
Size of Household



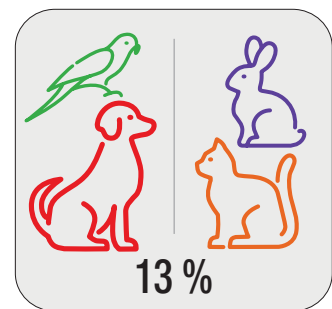
Age



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.

The population figures were collected on behalf of IVH and ZZF in a separate survey (basis: representative survey among 5,000 households).