



Pet Care in France

April 2024

Table of Contents

Pet Care in France

EXECUTIVE SUMMARY

Pet care in 2024: The big picture

2024 key trends

Competitive landscape

Retailing developments

What next for pet care?

MARKET INDICATORS

Table 1 - Pet Populations 2019-2024

MARKET DATA

Table 2 - Sales of Pet Food by Category: Volume 2019-2024

Table 3 - Sales of Pet Care by Category: Value 2019-2024

Table 4 - Sales of Pet Food by Category: % Volume Growth 2019-2024

Table 5 - Sales of Pet Care by Category: % Value Growth 2019-2024

Table 6 - NBO Company Shares of Pet Food: % Value 2019-2023

Table 7 - LBN Brand Shares of Pet Food: % Value 2020-2023

Table 8 - NBO Company Shares of Dog and Cat Food: % Value 2019-2023

Table 9 - LBN Brand Shares of Dog and Cat Food: % Value 2020-2023

Table 10 - Penetration of Private Label in Pet Care by Category: % Value 2019-2024

Table 11 - Distribution of Pet Care by Format: % Value 2019-2024

Table 12 - Distribution of Pet Care by Format and Category: % Value 2024

Table 13 - Distribution of Dog and Cat Food by Format: % Value 2019-2024

Table 14 - Distribution of Dog and Cat Food by Format and Category: % Value 2024

Table 15 - Forecast Sales of Pet Food by Category: Volume 2024-2029

Table 16 - Forecast Sales of Pet Care by Category: Value 2024-2029

Table 17 - Forecast Sales of Pet Food by Category: % Volume Growth 2024-2029

Table 18 - Forecast Sales of Pet Care by Category: % Value Growth 2024-2029

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Cat Food in France

KEY DATA FINDINGS

2024 DEVELOPMENTS

Pet cat population stabilises in 2024 but financial challenges continue to limit new adoptions

Players look to offer better value without compromising on quality

Smaller players make headway as leading players face stock shortages

PROSPECTS AND OPPORTUNITIES

Healthy and natural products likely to remain popular choices in cat food over the forecast period

Health and wellness concerns likely to dictate the development of cat food in France

E-commerce opening up new opportunities for cat food

CATEGORY INDICATORS

Table 19 - Cat Owning Households: % Analysis 2019-2024

Table 20 - Cat Population 2019-2024

Table 21 - Consumption of Cat Food by Prepared vs Non-prepared: % Analysis 2019-2024

CATEGORY DATA

Summary 2 - Cat Food by Price Band 2024

Table 22 - Sales of Cat Food by Category: Volume 2019-2024

Table 23 - Sales of Cat Food by Category: Value 2019-2024

Table 24 - Sales of Cat Food by Category: % Volume Growth 2019-2024

Table 25 - Sales of Cat Food by Category: % Value Growth 2019-2024

Table 26 - Sales of Dry Cat Food by Life-Cycle: % Value 2019-2024

Table 27 - Sales of Wet Cat Food by Life-Cycle: % Value 2019-2024

Table 28 - NBO Company Shares of Cat Food: % Value 2019-2023

Table 29 - LBN Brand Shares of Cat Food: % Value 2020-2023

Table 30 - LBN Brand Shares of Cat Treats and Mixers: % Value 2020-2023

Table 31 - Distribution of Cat Food by Format: % Value 2019-2024

Table 32 - Forecast Sales of Cat Food by Category: Volume 2024-2029

Table 33 - Forecast Sales of Cat Food by Category: Value 2024-2029

Table 34 - Forecast Sales of Cat Food by Category: % Volume Growth 2024-2029

Table 35 - Forecast Sales of Cat Food by Category: % Value Growth 2024-2029

Dog Food in France

KEY DATA FINDINGS

2024 DEVELOPMENTS

Sales of dog food in decline as the pet population drops and consumers look to reign in their spending

Pet shops and superstores continue to make inroads in dog food with an ever expanding network of outlets, products and services

Private label gains share despite strong brand loyalty in dog food

PROSPECTS AND OPPORTUNITIES

Dog food packaging set to be the focus of innovation

Focus on health and wellness likely to inform new product development in dog treats and mixers

Therapeutic dog food set to thrive while human food trends could inform new recipes and products

CATEGORY INDICATORS

Table 36 - Dog Owning Households: % Analysis 2019-2024

Table 37 - Dog Population 2019-2024

Table 38 - Consumption of Dog Food by Prepared vs Non-prepared: % Analysis 2019-2024

CATEGORY DATA

Summary 3 - Dog Food by Price Band 2024

Table 39 - Sales of Dog Food by Category: Volume 2019-2024

Table 40 - Sales of Dog Food by Category: Value 2019-2024

Table 41 - Sales of Dog Food by Category: % Volume Growth 2019-2024

Table 42 - Sales of Dog Food by Category: % Value Growth 2019-2024

Table 43 - Sales of Dry Dog Food by Life-Cycle: % Value 2019-2024

Table 44 - Sales of Wet Dog Food by Life-Cycle: % Value 2019-2024

Table 45 - NBO Company Shares of Dog Food: % Value 2019-2023

Table 46 - LBN Brand Shares of Dog Food: % Value 2020-2023

Table 47 - LBN Brand Shares of Dog Treats and Mixers: % Value 2020-2023

Table 48 - Distribution of Dog Food by Format: % Value 2019-2024

Table 49 - Forecast Sales of Dog Food by Category: Volume 2024-2029

Table 50 - Forecast Sales of Dog Food by Category: Value 2024-2029

Table 51 - Forecast Sales of Dog Food by Category: % Volume Growth 2024-2029

Table 52 - Forecast Sales of Dog Food by Category: % Value Growth 2024-2029

Other Pet Food in France

KEY DATA FINDINGS

2024 DEVELOPMENTS

Pet humanisation trend less visible when it comes to other pets
Consumers showing a growing interest in sustainability and the local environment
More consumers go online in search of the best deals

PROSPECTS AND OPPORTUNITIES

Premiumisation could expand in other pet food over the forecast period as players expand their offer
Focus on pet health expected to inform new product development while e-commerce is set increase its share of distribution
Other pet population likely to be linked to the recovery of the French economy

CATEGORY INDICATORS

Table 53 - Other Pet Population 2019-2024

CATEGORY DATA

Table 54 - Sales of Other Pet Food by Category: Volume 2019-2024
Table 55 - Sales of Other Pet Food by Category: Value 2019-2024
Table 56 - Sales of Other Pet Food by Category: % Volume Growth 2019-2024
Table 57 - Sales of Other Pet Food by Category: % Value Growth 2019-2024
Table 58 - LBN Brand Shares of Bird Food: % Value 2020-2023
Table 59 - LBN Brand Shares of Fish Food: % Value 2020-2023
Table 60 - LBN Brand Shares of Small Mammal/Reptile Food: % Value 2020-2023
Table 61 - Distribution of Other Pet Food by Format: % Value 2019-2024
Table 62 - Forecast Sales of Other Pet Food by Category: Volume 2024-2029
Table 63 - Forecast Sales of Other Pet Food by Category: Value 2024-2029
Table 64 - Forecast Sales of Other Pet Food by Category: % Volume Growth 2024-2029
Table 65 - Forecast Sales of Other Pet Food by Category: % Value Growth 2024-2029

Pet Products in France

KEY DATA FINDINGS

2024 DEVELOPMENTS

Premiumisation seen in cat litter while focus on pet health triggers growth
Pet humanisation trend continues to fuel demand for pet accessories
Flea/tick treatments remain important to maintaining pet health

PROSPECTS AND OPPORTUNITIES

Innovation and new technology should help boost sales of pet products
Concept stores bring an air of sophistication to pet products
Sustainability like to come back into focus as the economy stabilises

CATEGORY DATA

Table 66 - Sales of Pet Products by Category: Value 2019-2024
Table 67 - Sales of Pet Products by Category: % Value Growth 2019-2024
Table 68 - Sales of Pet Healthcare by Type: % Value 2019-2024
Table 69 - Sales of Other Pet Products by Type: % Value 2019-2024
Table 70 - NBO Company Shares of Pet Products: % Value 2019-2023
Table 71 - LBN Brand Shares of Pet Products: % Value 2020-2023
Table 72 - Distribution of Pet Products by Format: % Value 2019-2024
Table 73 - Forecast Sales of Pet Products by Category: Value 2024-2029

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/pet-care-in-france/report.