



Euromonitor
International

Pet Care in France

May 2025

Table of Contents

EXECUTIVE SUMMARY

- Pet care in 2025: The big picture
- 2025 key trends
- Competitive landscape
- Retail developments
- What next for pet care?

MARKET INDICATORS

Table 1 - Pet Populations 2020-2025

MARKET DATA

- Table 2 - Sales of Pet Food by Category: Volume 2020-2025
- Table 3 - Sales of Pet Care by Category: Value 2020-2025
- Table 4 - Sales of Pet Food by Category: % Volume Growth 2020-2025
- Table 5 - Sales of Pet Care by Category: % Value Growth 2020-2025
- Table 6 - NBO Company Shares of Pet Food: % Value 2020-2024
- Table 7 - LBN Brand Shares of Pet Food: % Value 2021-2024
- Table 8 - NBO Company Shares of Dog and Cat Food: % Value 2020-2024
- Table 9 - LBN Brand Shares of Dog and Cat Food: % Value 2021-2024
- Table 10 - Penetration of Private Label in Pet Care by Category: % Value 2020-2025
- Table 11 - Distribution of Pet Care by Format: % Value 2020-2025
- Table 12 - Distribution of Pet Care by Format and Category: % Value 2025
- Table 13 - Distribution of Dog and Cat Food by Format: % Value 2020-2025
- Table 14 - Distribution of Dog and Cat Food by Format and Category: % Value 2025
- Table 15 - Forecast Sales of Pet Food by Category: Volume 2025-2030
- Table 16 - Forecast Sales of Pet Care by Category: Value 2025-2030
- Table 17 - Forecast Sales of Pet Food by Category: % Volume Growth 2025-2030
- Table 18 - Forecast Sales of Pet Care by Category: % Value Growth 2025-2030

DISCLAIMER

SOURCES

Summary 1 - Research Sources

KEY DATA FINDINGS

2025 DEVELOPMENTS

- The rising cat population supports value growth, as consumers invest in premium products
- Nestlé Purina PetCare France retains its lead while recording the strongest uplift in share
- Retail e-commerce leads sales, with key players including dedicated pet shops

PROSPECTS AND OPPORTUNITIES

- High-quality proteins, superfood ingredients and functional benefits are set to drive value growth
- Retail e-commerce and an omnichannel approach will remain key strategies for distributors
- Health-focused innovation is set to shape cat food launches over the forecast period
- Summary 2 - Cat Food by Price Band 2025

CATEGORY INDICATORS

- Table 19 - Cat Owning Households: % Analysis 2020-2025
- Table 20 - Cat Population 2020-2025

Table 21 - Consumption of Cat Food by Prepared vs Non-prepared: % Analysis 2020-2025

CATEGORY DATA

- Table 22 - Sales of Cat Food by Category: Volume 2020-2025
- Table 23 - Sales of Cat Food by Category: Value 2020-2025
- Table 24 - Sales of Cat Food by Category: % Volume Growth 2020-2025
- Table 25 - Sales of Cat Food by Category: % Value Growth 2020-2025
- Table 26 - Sales of Dry Cat Food by Life-Cycle: % Value 2020-2025
- Table 27 - Sales of Wet Cat Food by Life-Cycle: % Value 2020-2025
- Table 28 - NBO Company Shares of Cat Food: % Value 2020-2024
- Table 29 - LBN Brand Shares of Cat Food: % Value 2021-2024
- Table 30 - LBN Brand Shares of Cat Treats and Mixers: % Value 2021-2024
- Table 31 - Distribution of Cat Food by Format: % Value 2020-2025
- Table 32 - Forecast Sales of Cat Food by Category: Volume 2025-2030
- Table 33 - Forecast Sales of Cat Food by Category: Value 2025-2030
- Table 34 - Forecast Sales of Cat Food by Category: % Volume Growth 2025-2030
- Table 35 - Forecast Sales of Cat Food by Category: % Value Growth 2025-2030

Dog Food in France

KEY DATA FINDINGS

2025 DEVELOPMENTS

- Incorporating added health benefits is a key driver of growth for dog food and treats
- Nestlé Purina PetCare France SAS retains its lead as Friskies and Fido improve its share
- Retail e-commerce leads distribution while physical retailers continue to expand store locations

PROSPECTS AND OPPORTUNITIES

- Premium dog food is set to drive growth as consumers become increasingly willing to invest in health benefits
 - Therapeutic dog food is set to thrive while human food trends inspire new recipes and products
 - Rising demand for sustainable sources of animal protein is expected to drive sales of insect-based products
- Summary 3 - Dog Food by Price Band 2025

CATEGORY INDICATORS

- Table 36 - Dog Owning Households: % Analysis 2020-2025
- Table 37 - Dog Population 2020-2025
- Table 38 - Consumption of Dog Food by Prepared vs Non-prepared: % Analysis 2020-2025

CATEGORY DATA

- Table 39 - Sales of Dog Food by Category: Volume 2020-2025
- Table 40 - Sales of Dog Food by Category: Value 2020-2025
- Table 41 - Sales of Dog Food by Category: % Volume Growth 2020-2025
- Table 42 - Sales of Dog Food by Category: % Value Growth 2020-2025
- Table 43 - Sales of Dry Dog Food by Life-Cycle: % Value 2020-2025
- Table 44 - Sales of Wet Dog Food by Life-Cycle: % Value 2020-2025
- Table 45 - NBO Company Shares of Dog Food: % Value 2020-2024
- Table 46 - LBN Brand Shares of Dog Food: % Value 2021-2024
- Table 47 - LBN Brand Shares of Dog Treats and Mixers: % Value 2021-2024
- Table 48 - Distribution of Dog Food by Format: % Value 2020-2025
- Table 49 - Forecast Sales of Dog Food by Category: Volume 2025-2030
- Table 50 - Forecast Sales of Dog Food by Category: Value 2025-2030
- Table 51 - Forecast Sales of Dog Food by Category: % Volume Growth 2025-2030
- Table 52 - Forecast Sales of Dog Food by Category: % Value Growth 2025-2030

Other Pet Food in France

KEY DATA FINDINGS

2025 DEVELOPMENTS

The cost-of-living crisis reduces ownership of other pets, challenging food sales

Versele-Laga NV leads the fragmented competitive landscape, while Riga SA increases its share

Pet shops and superstores lead sales, supported by store expansions

PROSPECTS AND OPPORTUNITIES

Limited population growth for other pets will challenge forecast sales

Sales through retail e-commerce are set to be driven by specialist websites

Innovation is set to focus on added health benefits and sustainability

CATEGORY INDICATORS

Table 53 - Other Pet Population 2020-2025

CATEGORY DATA

Table 54 - Sales of Other Pet Food by Category: Volume 2020-2025

Table 55 - Sales of Other Pet Food by Category: Value 2020-2025

Table 56 - Sales of Other Pet Food by Category: % Volume Growth 2020-2025

Table 57 - Sales of Other Pet Food by Category: % Value Growth 2020-2025

Table 58 - LBN Brand Shares of Bird Food: % Value 2021-2024

Table 59 - LBN Brand Shares of Fish Food: % Value 2021-2024

Table 60 - LBN Brand Shares of Small Mammal/Reptile Food: % Value 2021-2024

Table 61 - Distribution of Other Pet Food by Format: % Value 2020-2025

Table 62 - Forecast Sales of Other Pet Food by Category: Volume 2025-2030

Table 63 - Forecast Sales of Other Pet Food by Category: Value 2025-2030

Table 64 - Forecast Sales of Other Pet Food by Category: % Volume Growth 2025-2030

Table 65 - Forecast Sales of Other Pet Food by Category: % Value Growth 2025-2030

Pet Products in France

KEY DATA FINDINGS

2025 DEVELOPMENTS

The pet humanisation trend drives positive value growth for pet products

Vitakraft retains its lead through a wide range of goods available on and offline

Pet shops and superstores lead sales due to a wide variety of goods and personalised advice

PROSPECTS AND OPPORTUNITIES

Pet healthcare is expected to drive growth as the humanisation trend rises

An omnichannel approach will be key as consumers appreciate both convenience and personalised advice

Innovation is set to focus on technological solutions and sustainable attributes

CATEGORY DATA

Table 66 - Sales of Pet Products by Category: Value 2020-2025

Table 67 - Sales of Pet Products by Category: % Value Growth 2020-2025

Table 68 - Sales of Pet Healthcare by Type: % Value 2020-2025

Table 69 - Sales of Other Pet Products by Type: % Value 2020-2025

Table 70 - NBO Company Shares of Pet Products: % Value 2020-2024

Table 71 - LBN Brand Shares of Pet Products: % Value 2021-2024

Table 72 - Distribution of Pet Products by Format: % Value 2020-2025

Table 73 - Forecast Sales of Pet Products by Category: Value 2025-2030

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.