

Pet Care in Poland

June 2025

Table of Contents

Pet Care in Poland

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

Cat Food in Poland

KEY DATA FINDINGS

2025 DEVELOPMENTS

Increasing cat population drives growth in cat food, with value higher than volume due to price increases Mars maintains its top place, as Azan's Brit brand continue to attract attention E-commerce remains key for sales of pet care, including cat food

PROSPECTS AND OPPORTUNITIES

Ongoing growth for cat food, with premiumisation trend expected to become stronger Retail e-commerce will remain important for added value and convenience Ongoing innovation expected in functional nutrition and protein-based food Summary 2 - Cat Food by Price Band 2025

CATEGORY INDICATORS

Table 19 - Cat Owning Households: % Analysis 2020-2025Table 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 2020-2025Table 23 - Sales of Cat Food by Category: Value 2020-2025Table 24 - Sales of Cat Food by Category: % Volume Growth 2020-2025Table 25 - Sales of Cat Food by Category: % Value Growth 2020-2025Table 26 - Sales of Dry Cat Food by Life-Cycle: % Value 2020-2025Table 27 - Sales of Wet Cat Food by Life-Cycle: % Value 2020-2025Table 28 - NBO Company Shares of Cat Food: % Value 2020-2024Table 29 - LBN Brand Shares of Cat Food: % Value 2021-2024Table 30 - LBN Brand Shares of Cat Treats and Mixers: % Value 2021-2024Table 31 - Distribution of Cat Food by Category: Volume 2025-2030Table 33 - Forecast Sales of Cat Food by Category: Value 2025-2030Table 34 - Forecast Sales of Cat Food by Category: % Volume Growth 2025-2030Table 35 - Forecast Sales of Cat Food by Category: % Value Growth 2025-2030

Dog Food in Poland

KEY DATA FINDINGS

2025 DEVELOPMENTS

Positive sales for dog food, supported by large dog population and the appeal of economy dry dog food Mars holds onto its top place as private labels are on the rise E-commerce maintains its leading distribution share, while discounters also rise

PROSPECTS AND OPPORTUNITIES

Premiumisation/personalisation, humanisation, and sustainability set to be rising trends Ever-expanding e-commerce channel set to maintain its strength and grow in share Could supplements for pets become the next big thing? 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 2020-2025Table 40 - Sales of Dog Food by Category: Value 2020-2025Table 41 - Sales of Dog Food by Category: % Volume Growth 2020-2025Table 42 - Sales of Dog Food by Category: % Value Growth 2020-2025Table 43 - Sales of Dry Dog Food by Life-Cycle: % Value 2020-2025Table 44 - Sales of Wet Dog Food by Life-Cycle: % Value 2020-2025Table 45 - NBO Company Shares of Dog Food: % Value 2020-2024Table 46 - LBN Brand Shares of Dog Food: % Value 2021-2024Table 47 - LBN Brand Shares of Dog Treats and Mixers: % Value 2021-2024Table 48 - Distribution of Dog Food by Category: Volume 2025-2030Table 50 - Forecast Sales of Dog Food by Category: % Volume Growth 2025-2030Table 51 - Forecast Sales of Dog Food by Category: % Volume Growth 2025-2030Table 52 - Forecast Sales of Dog Food by Category: % Value Growth 2025-2030

Other Pet Food in Poland

KEY DATA FINDINGS

2025 DEVELOPMENTS

Small mammals continue to be main contributors of growth in other pet food Vitakraft maintains its overall lead, thanks to strength of its portofolio and poppularity of namesake brand in small mammal/reptile food E-commerce remains strong for other pet food

PROSPECTS AND OPPORTUNITIES

Ongoing positive sales for other pet food, driven by small mammal food Omnichannel expansion set to continue New formats expected for aquatic enthusiasts

CATEGORY INDICATORS

Table 53 - Other Pet Population 2020-2025

CATEGORY DATA

Table 54 - Sales of Other Pet Food by Category: Volume 2020-2025Table 55 - Sales of Other Pet Food by Category: Value 2020-2025Table 56 - Sales of Other Pet Food by Category: % Volume Growth 2020-2025Table 57 - Sales of Other Pet Food by Category: % Value Growth 2020-2025Table 58 - LBN Brand Shares of Bird Food: % Value 2021-2024Table 60 - LBN Brand Shares of Small Mammal/Reptile Food: % Value 2021-2024Table 61 - Distribution of Other Pet Food by Format: % Value 2020-2025Table 62 - Forecast Sales of Other Pet Food by Category: Volume 2025-2030Table 63 - Forecast Sales of Other Pet Food by Category: Walue 2025-2030Table 64 - Forecast Sales of Other Pet Food by Category: % Volume Growth 2025-2030Table 65 - Forecast Sales of Other Pet Food by Category: % Volume Growth 2025-2030

Pet Products in Poland

KEY DATA FINDINGS

2025 DEVELOPMENTS

High costs of living place downwards pressure on sales of non-essential pet products Private label and affordable options see growth E-commerce continues to grow, with pet shops remaining strong for certain products

PROSPECTS AND OPPORTUNITIES

Sales expected to grow over the forecast period, thanks to improving economy and necessity of cat litter Online developments will help to shape trends Innovation expected to remain strong in pet products

CATEGORY DATA

Table 66 - Sales of Pet Products by Category: Value 2020-2025Table 67 - Sales of Pet Products by Category: % Value Growth 2020-2025Table 68 - Sales of Pet Healthcare by Type: % Value 2020-2025Table 69 - Sales of Other Pet Products by Type: % Value 2020-2025Table 70 - NBO Company Shares of Pet Products: % Value 2020-2024Table 71 - LBN Brand Shares of Pet Products: % Value 2021-2024Table 72 - Distribution of Pet Products by Format: % Value 2020-2025Table 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-poland/report.