



Pet Care in South Africa

May 2024

Table of Contents

Pet Care in South Africa

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 South Africa

KEY DATA FINDINGS

2024 DEVELOPMENTS

Innovation in terms of specialised diets

Growth across price segments in a high inflation environment

PROSPECTS AND OPPORTUNITIES

Combating inflation with innovation

Rising distribution through retail e-commerce

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 South Africa

KEY DATA FINDINGS

2024 DEVELOPMENTS

The South African economy and its impact on dog food
Importance of health and wellness rises, but demand for affordable food is strong

PROSPECTS AND OPPORTUNITIES

Value growth set to continue for dog food, especially economy dog food
Opportunities to gain share through the online environment

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 South Africa

KEY DATA FINDINGS

2024 DEVELOPMENTS

Inflation also has an impact on other pet food
Marltons Pets & Products (Pty) Ltd maintains its lead

PROSPECTS AND OPPORTUNITIES

The influence of social media on other pet food
Marltons Pets & Products and Brenncoco Feeds Mills set to remain the leaders in other pet food

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 South Africa

KEY DATA FINDINGS

2024 DEVELOPMENTS

Stable growth for pet products
The effects of pet ownership and pet humanisation in pet products

PROSPECTS AND OPPORTUNITIES

Pet humanisation will continue to drive demand for pet products
Targeting Generation Z and Millennial pet owners

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

Table 74 - Forecast Sales of Pet Products by Category: % Value Growth 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-south-africa/report.