



**Euromonitor
International**

Pet Care in Austria

June 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

Breed-specific nutrition and a migration away from homemade food supports growth
Mars Austria OG leads while Vitakraft Pet Care GmbH & Co KG records the strongest growth
Supermarkets and pet stores and superstores compete for the leading position

PROSPECTS AND OPPORTUNITIES

Wet cat food is expected to remain a driver of growth as launches focus on premiumisation
Improved online-only features are set to support growth for retail e-commerce
Innovation will focus on products that support the specific health needs of cats
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 Austria

KEY DATA FINDINGS

2025 DEVELOPMENTS

- Premiumisation, health benefits and the rising dog population supports value growth
- Vitakraft Pet Care records a strong performance offering health-focused dog treats
- Pet shops and superstores lead distrubution as consumers appreciate additional in-person services

PROSPECTS AND OPPORTUNITIES

- A shift towards premium food with functional benefits is expected to support growth
 - Subscription services and delivery options will continue to support sales through retail e-commerce
 - Health is set to shape product innovation, with free-from recipes and human grade ingredients being key
- 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 Austria

KEY DATA FINDINGS

2025 DEVELOPMENTS

The easing of price increases supports retail volume growth for other pet food

Fressnapf Handels GmbH retains its lead while improving its share

Pet shops and superstores offer a wide variety of niche pet food options, leading sales

PROSPECTS AND OPPORTUNITIES

Growth will be driven by small mammals/reptile food, with a focus on premium solutions

Convenience, ease and subscription services are set to drive share for retail e-commerce

Sustainability, nutrition and personalised solutions are expected to be the focus of innovation

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 Austria

KEY DATA FINDINGS

2025 DEVELOPMENTS

Pet humanisation drives growth as consumers invest in pet healthcare

Fressnapf Handels GmbH maintains its lead, boosting share for private label goods

Pet shops and superstores retains its dominance as consumers appreciate in-store services

PROSPECTS AND OPPORTUNITIES

Growth is set to be driven by pet humanisation and health-focused spending

Retail e-commerce will continue to expand as a key channel for pet products

Innovation and sustainability are set to shape the future of pet products in Austria

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-austria/report.