



Passport

Cat Food in Belgium

Euromonitor International

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purposes only.
Some content and data have been
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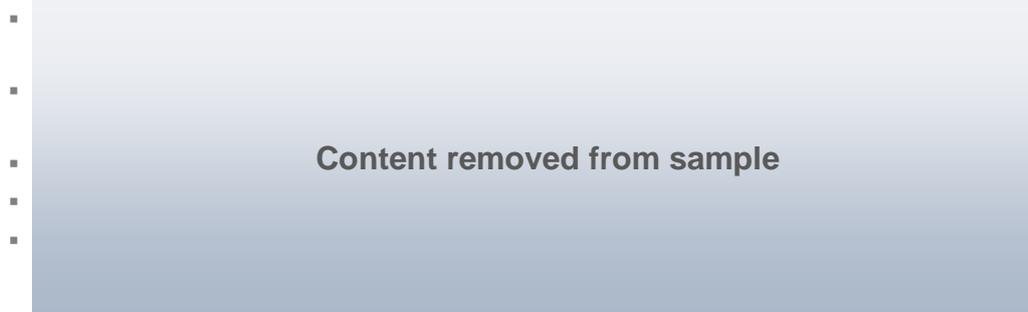
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CAT FOOD IN BELGIUM - CATEGORY ANALYSIS

HEADLINES

- In 2020 cat food records retail volume growth of 1% and current value growth of 5% to reach sales of...



PROSPECTS

Urbanisation Boosts Cat Ownership, But Benefits Cat Products Such As Cat Litter and Toys, As Well As Supporting the Growing Interest in Small Dogs, Mammals and Reptiles

Over the review period, changes to legislation in Belgium around registering pet ownership and compulsory sterilisation did not cause a dramatic decline on the cat population...



Premium Dry Cat Food Records the Highest Growth, However Wet Cat Food Shows More Significant Innovation, Set To Perform Well Over the Forecast Period

Premium dry cat food registers the strongest current value growth, with dry cat food having traditionally been...

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As Cat Owners Want To Pamper and Treat Their Felines, Cat Treats Remain One of the Fastest-growing Areas in All Belgium Pet Food

Cat treats are seeing solid growth in cat food, as well as overall, on the Belgium pet food landscape...

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COMPETITIVE LANDSCAPE

Mars and Nestlé Continue To Lead the Landscape, However, New Competition From Premium Wet Cat Food Players Is Set To Threaten Their Share Over the Forecast Period

Mars Belgium and Nestlé Purina PetCare continue to...



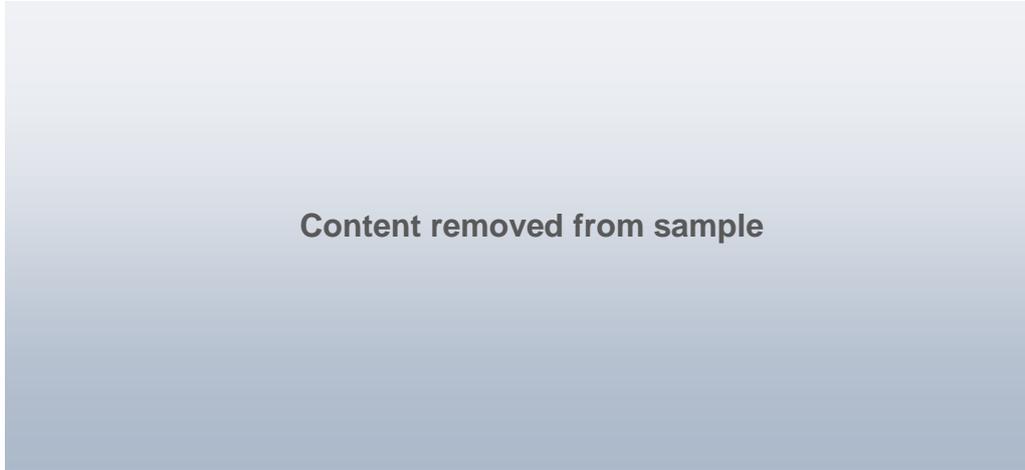
Economy Cat Food Is Dominated by Private Label Players, With Little Innovation As Main Supermarket Chains Lead the Landscape

The landscape for economy cat food is stagnant...



Cat Owners Increasingly Demand Eco-friendly, Sustainable and Healthy Product Options, All of Which Are Set To Grow Over the Forecast Period

With cats reputed to be selective over their food, changes and innovations to food tend...



CATEGORY INDICATORS

Table 1 Cat Owning Households: % Analysis 2015-2020

	2015	2016	2017	2018	2019	2020
% Households owning a cat (% households)	Data removed from sample					
Households owning a cat ('000 Households)						

Source: Euromonitor International from official statistics

Table 2 Cat Population 2015-2020

'000s of animals	2015	2016	2017	2018	2019	2020
Cat Population	Data removed from sample					

Source: Euromonitor International from official statistics

Table 3 Consumption of Cat Food by Prepared vs Non-prepared: % Analysis 2015-2020

% total consumption	2015	2016	2017	2018	2019	2020
Prepared cat food	Data removed from sample					
Non-prepared cat food						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

CATEGORY DATA

Summary 1 Cat Food by Price Band 2020

Category	Price range per kg	EUR	Brand examples
Wet cat food	Premium	Above 5.00	Sheba, Purina Gourmet
	Mid-priced	Between 2.51 - 4.49	Whiskas, Purina Felix
	Economy	Below 2.50	Aldi, Maxi Zoo Fit and Fun
Dry cat food	Premium	Above 4.50	Purina One, Royal Canin
	Mid-priced	Between 2.01 - 4.49	Whiskas, Purina Friskies
	Economy	Below 2.00	Aldi, Carrefour

Source: Euromonitor International

Table 4 Sales of Cat Food by Category: Volume 2015-2020

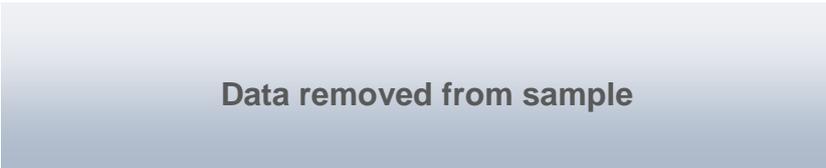
Tonnes	2015	2016	2017	2018	2019	2020
Cat Treats and Mixers	Data removed from sample					
- Cat Mixers						
- Cat Treats						
Dry Cat Food						
- Economy Dry Cat Food						
- Mid-Priced Dry Cat Food						
- Premium Dry Cat Food						
Wet Cat Food						
- Economy Wet Cat Food						
- Mid-Priced Wet Cat Food						
- Premium Wet Cat Food						
Cat Food						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 5 Sales of Cat Food by Category: Value 2015-2020

EUR million	2015	2016	2017	2018	2019	2020
Cat Treats and Mixers	Data removed from sample					
- Cat Mixers						
- Cat Treats						
Dry Cat Food						
- Economy Dry Cat Food						
- Mid-Priced Dry Cat Food						

- Premium Dry Cat Food
- Wet Cat Food
- Economy Wet Cat Food
- Mid-Priced Wet Cat Food
- Premium Wet Cat Food
- Cat Food



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 6 Sales of Cat Food by Category: % Volume Growth 2015-2020

% volume growth	2019/20	2015-20 CAGR	2015/20 Total
Cat Treats and Mixers	Data removed from sample		
- Cat Mixers			
- Cat Treats			
Dry Cat Food			
- Economy Dry Cat Food			
- Mid-Priced Dry Cat Food			
- Premium Dry Cat Food			
Wet Cat Food			
- Economy Wet Cat Food			
- Mid-Priced Wet Cat Food			
- Premium Wet Cat Food			
Cat Food			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 7 Sales of Cat Food by Category: % Value Growth 2015-2020

% current value growth	2019/20	2015-20 CAGR	2015/20 Total
Cat Treats and Mixers	Data removed from sample		
- Cat Mixers			
- Cat Treats			
Dry Cat Food			
- Economy Dry Cat Food			
- Mid-Priced Dry Cat Food			
- Premium Dry Cat Food			
Wet Cat Food			
- Economy Wet Cat Food			
- Mid-Priced Wet Cat Food			
- Premium Wet Cat Food			
Cat Food			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 8 Sales of Dry Cat Food by Life-Cycle: % Value 2015-2020

% retail value rsp	2015	2016	2017	2018	2019	2020
Adult	Data removed from sample					
Kitten/Pup						
Senior						
Other						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 9 Sales of Wet Cat Food by Life-Cycle: % Value 2015-2020

% retail value rsp	2015	2016	2017	2018	2019	2020
Adult	Data removed from sample					
Kitten/Pup						
Senior						
Other						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 10 NBO Company Shares of Cat Food: % Value 2015-2019

% retail value rsp	2015	2016	2017	2018	2019
Company	Data removed from sample				

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 11 LBN Brand Shares of Cat Food: % Value 2016-2019

% retail value rsp Brand (GBO)	Company (NBO)	2016	2017	2018	2019
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Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 12 LBN Brand Shares of Cat Treats: % Value 2016-2019

% retail value rsp Brand (GBO)	Company (NBO)	2016	2017	2018	2019
-----------------------------------	---------------	------	------	------	------

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 13 Distribution of Cat Food by Format: % Value 2015-2020

% retail value rsp	2015	2016	2017	2018	2019	2020
Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
-- Modern Grocery Retailers						
--- Convenience Stores						
--- Discounters						
--- Forecourt Retailers						
--- Hypermarkets						
--- Supermarkets						
-- Traditional Grocery Retailers						
- Mixed Retailers						
-- Department Stores						
-- Mass Merchandisers						
-- Variety Stores						
-- Warehouse Clubs						
- Non-Grocery Specialists						
-- Pet superstores						
-- Pet shops						
-- Health and Beauty Specialist Retailers						
--- Beauty Specialist Retailers						
--- Chemists/Pharmacies						
--- Drugstores/parapharmacies						
--- Other Health and Beauty Retailers						
-- Home and Garden Specialist Retailers						
--- Home Improvement and Gardening Stores						
--- Homewares and Home Furnishing Stores						
-- Other Non-Grocery Specialists						
Non-Store Retailing						
- Direct Selling						
- Homeshopping						
- E-Commerce						
Non-retail channels						
- Veterinary clinics						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 14 Forecast Sales of Cat Food by Category: Volume 2020-2025

Tonnes	2020	2021	2022	2023	2024	2025
Cat Treats and Mixers	Data removed from sample					
- Cat Mixers						
- Cat Treats						
Dry Cat Food						
- Economy Dry Cat Food						
- Mid-Priced Dry Cat Food						
- Premium Dry Cat Food						
Wet Cat Food						
- Economy Wet Cat Food						
- Mid-Priced Wet Cat Food						
- Premium Wet Cat Food						
Cat Food						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 15 Forecast Sales of Cat Food by Category: Value 2020-2025

EUR million	2020	2021	2022	2023	2024	2025
Cat Treats and Mixers	Data removed from sample					
- Cat Mixers						
- Cat Treats						
Dry Cat Food						
- Economy Dry Cat Food						
- Mid-Priced Dry Cat Food						
- Premium Dry Cat Food						
Wet Cat Food						
- Economy Wet Cat Food						
- Mid-Priced Wet Cat Food						
- Premium Wet Cat Food						
Cat Food						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 16 Forecast Sales of Cat Food by Category: % Volume Growth 2020-2025

% volume growth	2020/21	2020-25 CAGR	2020/25 Total
Cat Treats and Mixers	Data removed from sample		
- Cat Mixers			
- Cat Treats			
Dry Cat Food			
- Economy Dry Cat Food			
- Mid-Priced Dry Cat Food			
- Premium Dry Cat Food			
Wet Cat Food			
- Economy Wet Cat Food			
- Mid-Priced Wet Cat Food			

- Premium Wet Cat Food
Cat Food



Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 17 Forecast Sales of Cat Food by Category: % Value Growth 2020-2025

% constant value growth

	2020/2021	2020-25 CAGR	2020/25 Total
Cat Treats and Mixers	Data removed from sample		
- Cat Mixers			
- Cat Treats			
Dry Cat Food			
- Economy Dry Cat Food			
- Mid-Priced Dry Cat Food			
- Premium Dry Cat Food			
Wet Cat Food			
- Economy Wet Cat Food			
- Mid-Priced Wet Cat Food			
- Premium Wet Cat Food			
Cat Food			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

PET CARE IN BELGIUM - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

Premiumisation Boosts Value Sales in Pet Care, However, Growing Urbanisation and the Rise in Ownership of Smaller Pets, Impacts Volume Sales

Pet care in Belgium continues to record substantial current value growth, with particularly high levels of growth recorded by premium dry cat food...

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Humanisation, Health and Wellness and Premiumisation Shape the Pet Care Landscape in 2020

Humanisation continues to rise in the Belgium pet care landscape, influencing the popularity of pet accessories...

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International Players Continue To Lead the Landscape, However, Mars Belgium and Nestlé Purina Petcare Struggle Against the Rise of Premiumisation

Mars Belgium NV SA leads the competitive landscape in pet care...

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E-commerce Continues To Increase; However, Supermarkets and Pet Superstores Are Still the Most Popular Places To Purchase Pet Care

E-commerce continues to thrive in Belgian pet care and is one of the fastest-growing...

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Increased Spending on Premium Food, Treats, Accessories, and Sustainable, Eco-friendly Pet Care Products, Will Boost Growth Over the Forecast Period

Pet care in Belgium is set to record increased growth compared to 2020...

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MARKET INDICATORS

Table 18 Pet Populations 2015-2020

'000s of animals	2015	2016	2017	2018	2019	2020
Bird Population	Data removed from sample					
Cat Population						
Dog Population						
Fish Population						
Reptile Population						
Small Mammal Population						
Pet Population						

Source: Euromonitor International from official statistics

MARKET DATA

Table 19 Sales of Pet Food by Category: Volume 2015-2020

Tonnes	2015	2016	2017	2018	2019	2020
Dog and Cat Food	Data removed from sample					
Other Pet Food						
Pet Food						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 20 Sales of Pet Care by Category: Value 2015-2020

EUR million	2015	2016	2017	2018	2019	2020
Dog and Cat Food	Data removed from sample					
Other Pet Food						
Pet Food						
Cat Litter						
Pet Healthcare						
Pet Dietary Supplements						
Other Pet Products						
Pet Products						
Pet Care						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 21 Sales of Pet Food by Category: % Volume Growth 2015-2020

% volume growth	2019/20	2015-20 CAGR	2015/20 Total
Dog and Cat Food	Data removed from sample		
Other Pet Food			
Pet Food			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 22 Sales of Pet Care by Category: % Value Growth 2015-2020

% current value growth	2019/20	2015-20 CAGR	2015/20 Total
Dog and Cat Food	Data removed from sample		
Other Pet Food			
Pet Food			
Cat Litter			
Pet Healthcare			
Pet Dietary Supplements			
Other Pet Products			
Pet Products			
Pet Care			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 23 NBO Company Shares of Pet Food: % Value 2015-2019

% retail value rsp	2015	2016	2017	2018	2019
Company	Data removed from sample				

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 24 LBN Brand Shares of Pet Food: % Value 2016-2019

% retail value rsp Brand (GBO)	Company (NBO)	2016	2017	2018	2019
-----------------------------------	---------------	------	------	------	------

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 25 NBO Company Shares of Dog and Cat Food: % Value 2015-2019

% retail value rsp Company	2015	2016	2017	2018	2019
-------------------------------	------	------	------	------	------

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 26 LBN Brand Shares of Dog and Cat Food: % Value 2016-2019

% retail value rsp Brand (GBO)	Company (NBO)	2016	2017	2018	2019
Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 27 Penetration of Private Label in Pet Care by Category: % Value 2015-2020

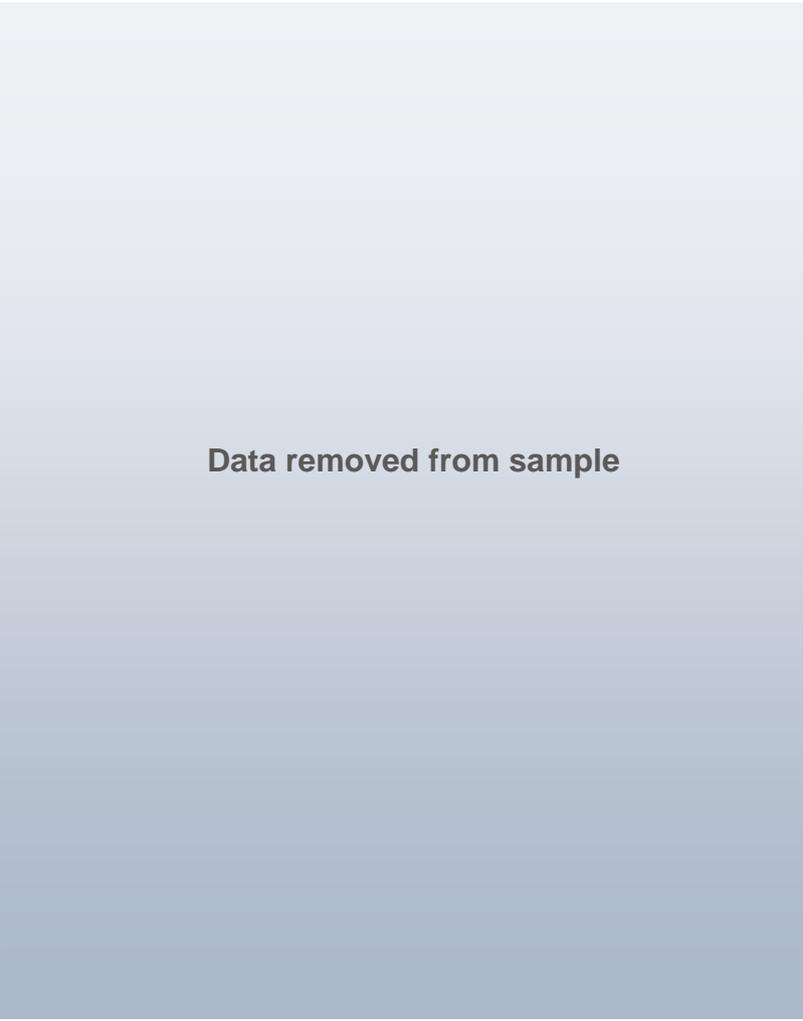
% retail value rsp	2015	2016	2017	2018	2019	2020
Pet Care	Data removed from sample					
Pet Food						
Pet Products						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 28 Distribution of Pet Care by Format: % Value 2015-2020

% retail value rsp	2015	2016	2017	2018	2019	2020
Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
-- Modern Grocery Retailers						
--- Convenience Stores						
--- Discounters						

- Forecourt Retailers
- Hypermarkets
- Supermarkets
- Traditional Grocery Retailers
- Mixed Retailers
- Department Stores
- Mass Merchandisers
- Variety Stores
- Warehouse Clubs
- Non-Grocery Specialists
- Pet superstores
- Pet shops
- Health and Beauty Specialist Retailers
- Beauty Specialist Retailers
- Chemists/Pharmacies
- Drugstores/parapharmacies
- Other Health and Beauty Retailers
- Home and Garden Specialist Retailers
- Home Improvement and Gardening Stores
- Homewares and Home Furnishing Stores
- Other Non-Grocery Specialists
- Non-Store Retailing
- Direct Selling
- Homeshopping
- E-Commerce
- Non-retail channels
- Veterinary clinics
- Total

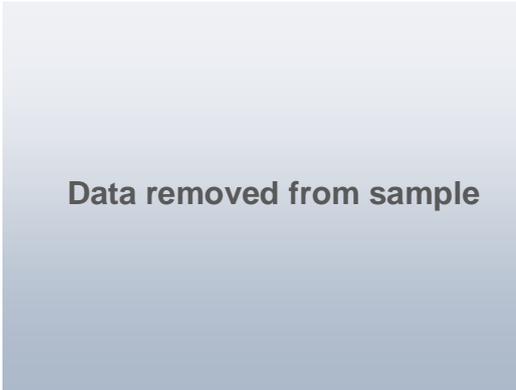


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 29 Distribution of Pet Care by Format and Category: % Value 2020

% retail value rsp

	PF	PP
Store-Based Retailing		
- Grocery Retailers		
-- Modern Grocery Retailers		
--- Convenience Stores		
--- Discounters		
--- Forecourt Retailers		
--- Hypermarkets		
--- Supermarkets		
-- Traditional Grocery Retailers		
- Mixed Retailers		
-- Department Stores		
-- Mass Merchandisers		
-- Variety Stores		
-- Warehouse Clubs		



- Non-Grocery Specialists
- Pet superstores
- Pet shops
- Health and Beauty Specialist Retailers
- Beauty Specialist Retailers
- Chemists/Pharmacies
- Drugstores/parapharmacies
- Other Health and Beauty Retailers
- Home and Garden Specialist Retailers
- Home Improvement and Gardening Stores
- Homewares and Home Furnishing Stores
- Other Non-Grocery Specialists
- Non-Store Retailing
- Direct Selling
- Homeshopping
- E-Commerce
- Non-retail channels
- Veterinary clinics
- Total

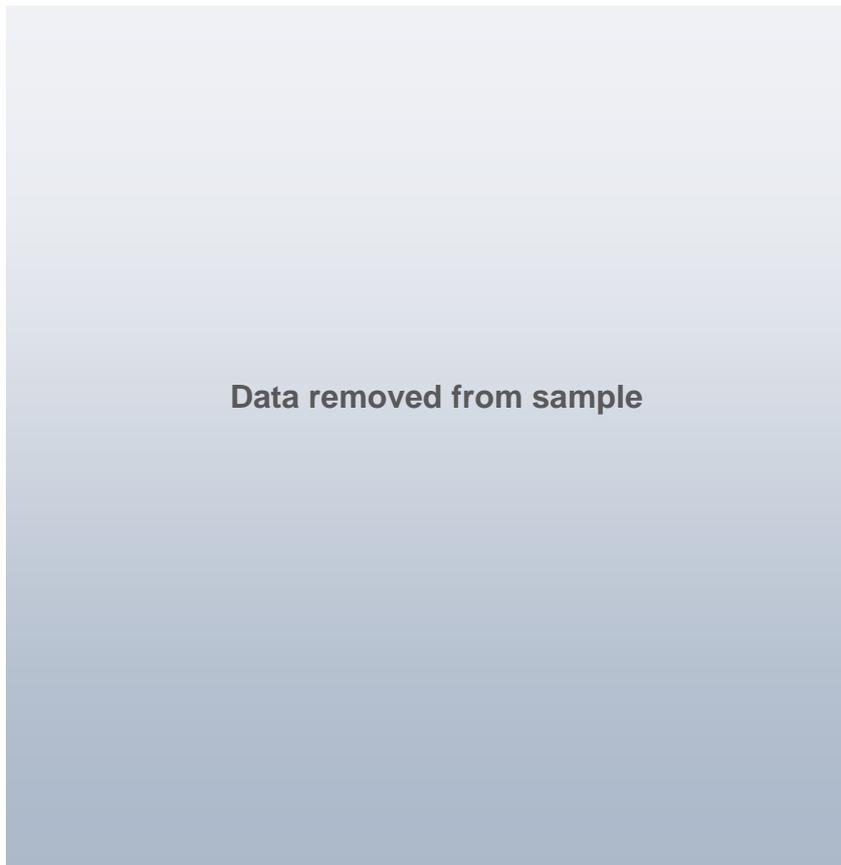


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources
 Key: PF = pet food; PP = pet products

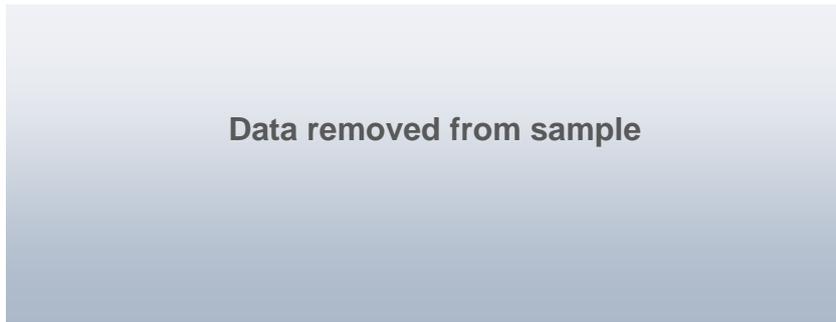
Table 30 Distribution of Dog and Cat Food by Format: % Value 2015-2020

% retail value rsp	2015	2016	2017	2018	2019	2020
--------------------	------	------	------	------	------	------

- Store-Based Retailing
- Grocery Retailers
- Modern Grocery Retailers
- Convenience Stores
- Discounters
- Forecourt Retailers
- Hypermarkets
- Supermarkets
- Traditional Grocery Retailers
- Mixed Retailers
- Department Stores
- Mass Merchandisers
- Variety Stores
- Warehouse Clubs
- Non-Grocery Specialists
- Pet superstores
- Pet shops
- Health and Beauty Specialist Retailers
- Beauty Specialist Retailers
- Chemists/Pharmacies
- Drugstores/parapharmacies
- Other Health and Beauty Retailers
- Home and Garden Specialist Retailers
- Home Improvement



- and Gardening Stores
- Homewares and Home Furnishing Stores
- Other Non-Grocery Specialists
- Non-Store Retailing
- Direct Selling
- Homeshopping
- E-Commerce
- Non-retail channels
- Veterinary clinics
- Total

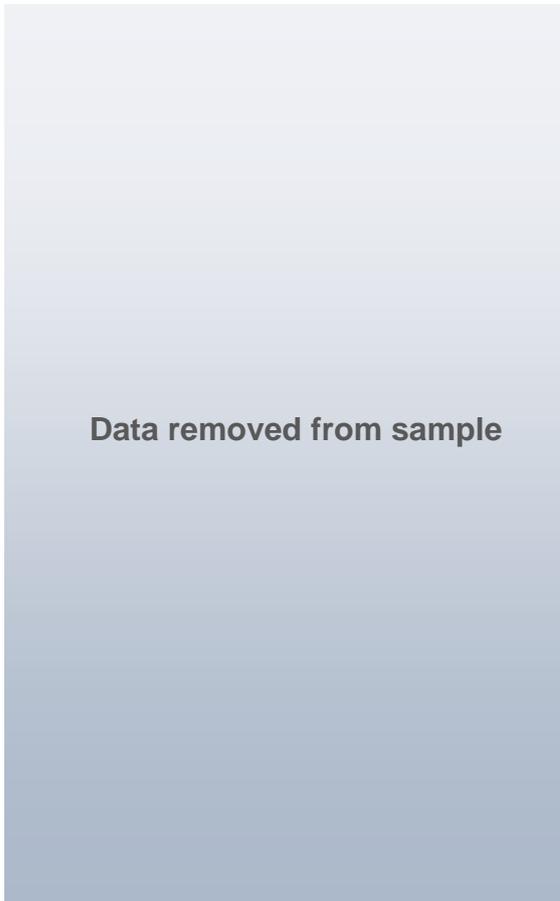


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 31 Distribution of Dog and Cat Food by Format and Category: % Value 2020

% retail value rsp

	CF	DF
Store-Based Retailing		
- Grocery Retailers		
-- Modern Grocery Retailers		
--- Convenience Stores		
--- Discounters		
--- Forecourt Retailers		
--- Hypermarkets		
--- Supermarkets		
-- Traditional Grocery Retailers		
- Mixed Retailers		
-- Department Stores		
-- Mass Merchandisers		
-- Variety Stores		
-- Warehouse Clubs		
- Non-Grocery Specialists		
-- Pet superstores		
-- Pet shops		
-- Health and Beauty Specialist Retailers		
--- Beauty Specialist Retailers		
--- Chemists/Pharmacies		
--- Drugstores/parapharmacies		
--- Other Health and Beauty Retailers		
-- Home and Garden Specialist Retailers		
--- Home Improvement and Gardening Stores		
--- Homewares and Home Furnishing Stores		
-- Other Non-Grocery Specialists		
Non-Store Retailing		
- Direct Selling		
- Homeshopping		
- E-Commerce		
Non-retail channels		
- Veterinary clinics		
Total		



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Key: CF = cat food; DF = dog food

Table 32 Forecast Sales of Pet Food by Category: Volume 2020-2025

Tonnes	2020	2021	2022	2023	2024	2025
Dog and Cat Food	Data removed from sample					
Other Pet Food						
Pet Food						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 33 Forecast Sales of Pet Care by Category: Value 2020-2025

EUR million	2020	2021	2022	2023	2024	2025
Dog and Cat Food	Data removed from sample					
Other Pet Food						
Pet Food						
Cat Litter						
Pet Healthcare						
Pet Dietary Supplements						
Other Pet Products						
Pet Products						
Pet Care						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 34 Forecast Sales of Pet Food by Category: % Volume Growth 2020-2025

% volume growth	2020/21	2020-25 CAGR	2020/25 Total
Dog and Cat Food	Data removed from sample		
Other Pet Food			
Pet Food			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 35 Forecast Sales of Pet Care by Category: % Value Growth 2020-2025

% constant value growth	2020/2021	2020-25 CAGR	2020/25 Total
Dog and Cat Food	Data removed from sample		
Other Pet Food			
Pet Food			
Cat Litter			
Pet Healthcare			
Pet Dietary Supplements			
Other Pet Products			
Pet Products4.6			
Pet Care			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

CORONAVIRUS (COVID-19)

The data and analysis in this report were compiled in early 2020, weeks before the World Health Organization declared COVID-19 a global pandemic on 11 March 2020. As such, projections for 2020 and beyond will not capture the full implications of this pandemic on the pet care industry. Historic data have been fully updated and can be leveraged to gauge historic developments through 2019.

The rapid evolution of COVID-19 has significant implications for pet care in the short, medium and long term. The pandemic threatens supply chains, impacting the workforce and availability of key inputs. The recessionary fallout will test pet humanisation trends, particularly in severe downturn scenarios. At retail level, COVID-19 is accelerating an online shift as social distancing changes habits. Pet ownership trends are also changing as adoptions surge in some markets, while abandonments increase in others.

For the latest insight on COVID-19, readers can access strategic analysis and updates on the Passport system and www.euromonitor.com. Please refer to The Impact of Coronavirus on Pet Care report as a starting point. Additional content will be added on a systematic basis as the situation develops.

DEFINITIONS

This report analyses the market for pet care in Belgium. For the purposes of the study, the market has been defined as follows:

- Dog food
- Cat food
- Other pet food
- Pet products

SOURCES

Sources used during the research included the following:

Summary 2 Research Sources

Official Sources

Trade Associations

Trade Press

Data removed from sample



Source: Euromonitor International