

Pet Care in Ireland

April 2024

Table of Contents

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

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Persistent inflationary pressure sustains unit price increases
- Cat owners' value for money focus boosts the demand for private label
- Ongoing emphasis on sustainability fuels new product developments

PROSPECTS AND OPPORTUNITIES

- Mars and Nestlé are expected to remain the leaders
- New retail developments are anticipated
- Enhanced nutritional standards and a focus on premium offerings

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 Ireland

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Financial constraints limit dog ownership and retail volume growth potential
- Private label performs strongly as dog owners seek cost-effective options
- Premiumisation and financial concerns lead to polarisation

PROSPECTS AND OPPORTUNITIES

- Economic constraints are set to ease, but the popularity of private label is expected to persist in the short term
- Sustainability a focus with insect-based food set to gain traction
- Rise in dog obesity to heighten nutrition awareness and drive a demand for fresher food

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 Ireland

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Small mammals are seen as more budget-friendly pets than dogs or cats
- Small players leverage lower prices to exert pressure on the leading companies
- Innovative strategies to lure consumers to specialist retailers

PROSPECTS AND OPPORTUNITIES

- Cat and dog food concepts could shape innovation in other pet food
- Affordability is set to continue to spur other pet ownership
- More limited opportunities for private label 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 Ireland

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Economic pressures continue to hinder the demand for perceived discretionary “other” pet products
- Innovative products emerge in pet healthcare
- E-commerce continues to leverage competitive advantages to lead distribution

PROSPECTS AND OPPORTUNITIES

- Emphasis on health and wellness to push the potential of pet healthcare
- Increasing focus on sustainability in pet products
- Innovation and technology enhancements are set to revolutionise pet products

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

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-ireland/report.