

Pet Care in Canada

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

- Growing sophistication and premiumisation in cat food in Canada
- Canadian sourced, freeze-dried and raw cat food win over local consumers
- Functional food for Canadian cats

PROSPECTS AND OPPORTUNITIES

- Emphasis on Canadian sourcing and sustainability
- Advancements in technology to usher in personalised cat food plans
- E-commerce and brick-and-mortar synergy

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 Canada

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Dehydrated and raw food options gain traction
- Premiumisation trend increases spending on high-quality, health-orientated dog food
- Functional dog food emerges as a niche

PROSPECTS AND OPPORTUNITIES

- Emphasis on sustainability and transparency
- Rise of personalised nutrition
- Convenience and wide selections to push online sales of dog 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 Canada

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Premiumisation and natural trends mirror dog and cat food developments
- Species-specific nutrition for fish and reptiles
- Convenience drives online and offline retailing responses

PROSPECTS AND OPPORTUNITIES

- Sustainable packaging and sourcing
- Personalised pet food through healthcare and technology developments
- Focus on natural and organic 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 Canada

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Owners adapt the home environment to their pets
- Focus on sustainability and eco-friendly pet products
- Subscription services gain traction in pet products

PROSPECTS AND OPPORTUNITIES

- Personalised healthcare, grooming and other pet products to gain momentum
- Rise of tech-enabled products for pets
- Focus on mental stimulation and interactive toys

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-canada/report.