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International Markets Bureau

MARKET INDICATOR REPORT | APRIL 2011

Consumer Trends

Pet Food in Germany

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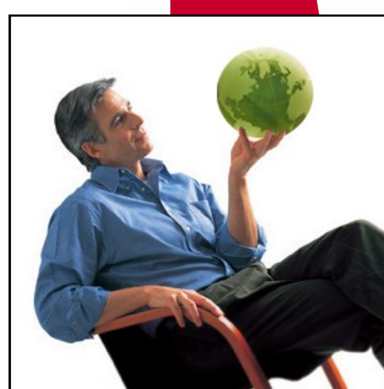


Growing Forward

Canada

EXECUTIVE SUMMARY

Source: *Shutterstock*

Germany has shown one of the strongest economic recoveries in Europe. The country is also sixth on the list of the fastest growing pet food markets globally and is expected to be valued at US $2.2 billion in 2014.

While the German Gross Domestic Product (GDP) experienced an unprecedented decline during 2009, value and volume sales of pet food remained relatively unaffected. Few German consumers were willing to cut back on their pet's nutrition, as they perceive their animals to be extended members of the family. Pet ownership in Germany is predominantly seen in younger and older demographics.

The importance of pets in Germany is expected to increase over the coming years. For example, the cat population is expected to increase to 9.5 million by 2015. This will cause cat food sales to perform well in the foreseeable future. It is important to note, however, that at this time there are many pet owners seeking more value and turning to lower cost products in a bid to reduce costs.

As the German economy continues to improve, pet owners will increasingly purchase higher quality products and those with added value. Euromonitor analysts anticipate some pet foods, such as dry formats and those aimed at the various stages of a pets life, will perform well. As well, pet owners who shifted from branded to unbranded pet food products, are likely to shift their purchasing preferences back towards branded products in the future.

INSIDE THIS ISSUE

DID YOU KNOW?

- Pet humanization is driving pet food purchases.
- Canada ranks 24th in exporting dog and cat food preparations into Germany

CONSUMER TRENDS

- Pet humanization is driving product purchases in Germany. Pet owners are looking for products which "support a healthy immune system", "develop softer coats", and "promote healthier skin" in an effort to improve their pet's overall health.

- A number of German pet owners are switching to private label products and finding they meet their pets' basic needs, particularly with the higher-end, more premium labels. This trend has resulted in a high penetration rate of private label across pet foods, especially in sales of cat food. Private label penetration into the German pet food sector, based on the percentage of retail sales for the past five years were; 32.6% in 2005, 34.1% in 2006, 35% in 2007, 35.4% in 2008, and 35% in 2009.

- Private label aside, the German pet food market consists mainly of large multinational players. These companies benefit from large marketing and innovation capacities, as well as a fairly loyal customer base.

- The organic pet food market in Germany has been witnessing the same trends as the packaged foods market over the last few years. A recent survey showed that 1 in 4 consumers who purchase organic food for themselves would be happy to purchase organic food for their pets as well.

RETAIL TRENDS

- Fressnapf accounts for approximately one-third of total pet food sales in Germany. The chain has a total of 777 stores in Germany and 1,114 more spread across Europe. The company's global pet care banner sales for 2009 were US $1.3 billion. The organization's central warehouse is located in Krefeld and is Europe's largest pet supply distribution outlet.

- Smaller independent retailers are struggling and there has been some consolidation as larger chains, such as Edeka (15,000 outlets in Germany) regularly acquire these smaller businesses. Edeka currently owns 25% of the grocery market. The superstore-like environment has meant small independent pet shops are losing sales, falling from a 25% share in 2000 to less than 15% in 2009. This trend is projected to continue in the near future.

- Discounters are also a top performer as they help further the presence of private label.

- The trends seen in the packaged food industry will filter down to the pet food industry, including age-specific, and health-related pet foods.

- Price wars have been dominating the retail industry in Germany over the past year, pitting grocery chains against discounters, supporting the claim that consumers are still price-conscious in general.

Germany - Sales of Pet Food by Distribution Format: % Analysis 2010

Retail Venue	% Retail Sales
Pet Superstores	23.2
Supermarkets/Hypermarkets	47.2
Grocery Retailers	63.3
Discounters	14.3

Source: *Euromonitor International estimates*

Germany - Sales of Dog and Cat Food by Distribution Format: % Analysis 2010

Retail Venue	% Retail Sales Dog Food	% Retail Sales Cat Food
Pet Superstores	23	20
Supermarkets/ Hypermarkets	42.9	57.1
Grocery Retailers	61.3	73.9
Discounters	16.4	14.9

Source: *Euromonitor International estimates*

MARKET DATA

- While there were some fluctuations in the German pet population, the overall number of pets has increased, rising from 70 million animals in 2000 to 72.6 million in 2009. The increase was most notably amongst cats, the population of which has increased from seven million in 2000 to 8.3 million in 2009.

- The increase and forecasted growth in the overall pet population in Germany is being attributed to two factors: the only growing demographic in the country is pensioners, coupled with a steady decline in birth rates.

- This rising pet population continues to contribute to an increase in the overall market for pet food, both in value and volume terms, although some categories such as bird and fish food have been underperforming compared to products such as cat or dog food.

Germany - Pet Food market - US Millions

	2005	2006	2007	2008	2009	2010
Cat Food	1,453.20	1,513.10	1,626.60	1,717.90	1,788.40	1,856.90
Dog Food	1,267.20	1,278.50	1,334.90	1,390.10	1,431.30	1,478.40
Other Pet Food	321.9	323.1	322.4	330	335.7	340.1
Pet Food total	3,042.30	3,114.70	3,283.90	3,438.00	3,555.40	3,675.40

Source: *Euromonitor*

- After falling by 5.7% in 2007, the volume of pet food imported into Germany followed signs of the country's economic recovery, with positive growth of 0.1% in 2008, and 0.6% in 2009.

- The most popular packaging for both dog and cat food is metal food cans (400g size) or aluminum trays (100g size), followed by flexible packaging, such as stand-up (100g size) or plastic pouches (50g size).

INDUSTRY COMPETITION

- The Global Trade Atlas lists the following top five countries exporting dog and cat pet food preparations for retail into Germany for 2009: the Netherlands—CAD $314.7 million, France—CAD $214.1 million, Liechtenstein—CAD $108 million, the United Kingdom—CAD $60.3 million, and Austria—CAD $42.9 million. Canada ranked 24th on the list, exporting CAD $204.1 thousand during the same time period, slightly up from the 2008 total of CAD $199.9 thousand. There is much to do to fill the gap between import opportunities and Canadian exports to this market.

German Import Statistics - Pet Food - Tonnes

2004	2005	2006	2007	2008	2009
554,288	596,600	600,382	565,918	566,695.40	570,040

Source: *Euromonitor International*

German Pet Food Industry - Brand Shares (by Global Brand Name) - Retail Sales - % breakdown

Brand	Company name (GBO)	2005	2006	2007	2008	2009
Whiskas	Mars Inc	9.9	9.6	9.4	9.2	9
Pedigree	Mars Inc	6.2	5.8	5.5	5.6	5.6
Vitakraft	Vitakraft-Werke Wührmann & Sohn	4.5	4.3	4.1	4.1	4.1
Felix	Nestlé SA	2.8	3	3.2	3.6	3.9
Sheba	Mars Inc	4.4	4.3	4.1	4	3.8
Kitekat	Mars Inc	4.3	4.1	3.9	3.7	3.6
Frolic	Mars Inc	3.6	3.4	3.2	3.2	3.2
Gourmet	Nestlé SA	2.1	2.2	2.3	2.3	2.3
Purina	Nestlé SA	2.1	2.2	2.2	2.2	2.1
Royal Canin	Mars Inc	2.3	2.2	2.1	2.1	2.1
Eukanuba	Procter & Gamble Co, The	1.9	1.9	1.9	1.9	1.9
Chappi	Mars Inc	1.8	1.5	1.6	1.6	1.6
Cesar	Mars Inc	1.6	1.5	1.4	1.4	1.5
Tetra	Spectrum Brands Inc	1.6	1.6	1.5	1.5	1.4
Gimborn	Süd-Chemie AG	1.6	1.5	1.4	1.4	1.4
Hill's Science Diet	Colgate-Palmolive Co	1.1	1.1	1.3	1.3	1.3
Purina ONE	Nestlé SA	0.7	0.7	0.8	0.9	1
Gimpet	Süd-Chemie AG	0.9	0.9	0.9	1	0.9
Affinity Brekkies	Agrolimen SA	1	1	0.8	0.8	0.7
Dog Chow	Nestlé SA	0.6	0.6	0.6	0.6	0.6
Iams	Procter & Gamble Co, The	0.4	0.5	0.5	0.4	0.5
JBL	JBL GmbH & Co KG	0.5	0.5	0.5	0.5	0.4
Matzinger	Nestlé SA	1	1	0.3	0.3	0.4
Perfect Fit	Mars Inc	-	-	0.1	0.2	0.4
Beneful	Nestlé SA	0.1	0.2	0.2	0.2	0.2
Loyal	Mars Inc	0.4	0.4	0.2	0.2	0.2
Trill	Mars Inc	0.2	0.2	0.1	0.1	0.1
Mixer	Mars Inc	0.1	0.1	0.1	0.1	0.1
Pitti	Pitti Heimtierprodukte Gmbh	0.1	0.1	0.1	0.1	0.1
Private label	Private Label	32.6	34.1	35	35.4	35
Others	Others	9.6	9.6	10.6	9.9	10.5

Source: *Euromonitor International*

▶ WHOLESALER/DISTRIBUTION IMPORTERS

- German law places no restrictions on the means used to distribute imported goods in the country. Thus, foreign businesses can select the distribution channel/s best suited to their product and preferred degree of involvement in the German market. The most common distribution channels consist of wholesale and retail enterprises, trading houses, merchants, commercial agents, distributors and, finally, subsidiaries in Germany.

- There are over 85 pet product suppliers in Germany. Below is a list of some of the important ones (Pet Product Suppliers Inventory, www.petproducts1.com):

    - Bewital Gmbh & co. Kg., phone: +49-2862-5810—Import and distribute.
    - Christian Steinbach-zoobedarf-heimtiernahrung, Inhaber Ralf Steinbach 7, Wabern, Germany, phone: +49-5683-99850—import pet food, production and distribution.
    - Fressnapf Stelberg Gmbh, Troisdorf, Germany, phone: +49-2241-404470—pet food import, export, production, and distribution.
    - Wh-Pet Products GMbh, Brusseler Str. 10 48455 Bad Bentheim, Germany phone: +49 59 24 25 52 40, wholesaler of pet foods
    - Scharnebecker Muhle Diha Gmbh, Kringelsburg 1 21379 Scharnebeck, Germany, phone: +49 413 69 12 40, wholesaler of pet foods
    - Systemhandel Vertriebsgesellschaft Fur Food, Aubere Sulzbacher Str. 47 90491 Nurnberg, Germany, phone: +49 91 19 59 80 60. Distributor of pet food.
    - Technoplan Consult & Vertriebs Gmbh, Rechbergstrl 11 73101 Aichelberg, Germany phone: +49 716 49 422 30. Distributor of pet food.
    - Verhoeven Handelsgesellschaft Mbh, Erich-wolf-Str. 18 63840 Hausen, Germany phone: +49 602 22 56 53. Distributor of pet foods.
    - Raiffeisen-Warengenossenschaft Twistringen Eg, Konrad-Adenauer-Str. PF 1255 27239 Twistringen, Germany phone: +49 424 39 29 60. Wholesaler of pet food.
    - Heinrich Nagel KG (Gmbh & Co.), Monckebergstr. 17 PF 104729 20095 Hamburg, Germany phone: +49 403 09 51 40. Wholesaler of pet food.
    - Jokisch Schnellgerichte Gmbh, Hinter Den Kirschkaten 26 23560 Lubeck, Germany phone: +49 451 58 31 90. Wholesaler of pet food.
    - Allco Heimtierbedarf Gbh & Co. KG, Muggenort 21 27321 Morsum, Germany phone: +49 423 39 32 00. Distributor of pet food.
    - Becker-Schoell Aktiengesellschaft, Im Kalten Brunnen 14 72666 Neckartailfingen, Germany phone: +49 712 79 32 73. Wholesaler of dog and cat food.

PRODUCT DEVELOPMENTS

- The number of premium pet food products on the shelves is growing, as consumers' demand for gastronomy and gourmet products is increasing. These consumers want natural and organic ingredients for their pets. Some examples of this trend are Gourmet Eiersouffle (egg soufflé flavoured cat food), or certified organic products such as Defu Bio-Organic, advertised as free from genetically modified ingredients, certified organic, without preservatives and free from industrial meat. The market for organic pet food and pet food that is "free from" undesirable ingredients such as GMO, as well as products with unusual premium flavours are expected to become increasingly important.

- Segmentation of the 362 new pet food products launched in 2009 supports the trend towards healthier, more natural pet foods, with the most popular claim being "no additives/preservatives" in 142 of the new pet food products launched. The next most popular claim was in the "aids digestion and urinary tract" category, with 75 new pet food products. The "helps skin and coat" claim was found in 66 new products, followed by "vitamin and mineral fortified" in 48 of the 362 new pet food products launched.

- A breakdown of the 2009 new product launches by sub-category, shows that wet cat food had the most launches with 109. Following in second place was dog snacks and treats with 57 new products, dry cat food with 54, wet dog food with 52, dry dog food with 48, and cat snacks and treats with 42.

DOG FOOD

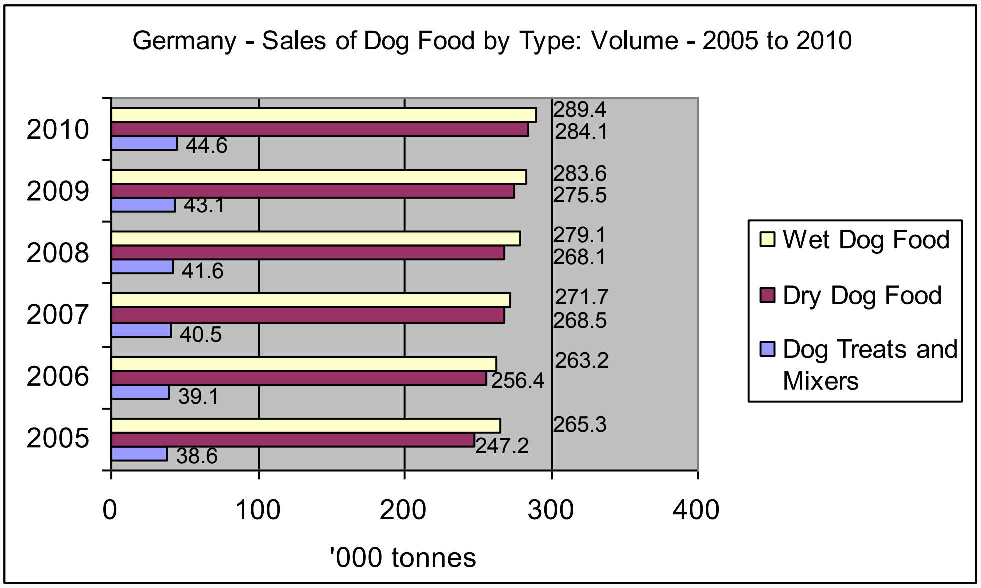
- As of 2009, 13.3% of German households owned a dog, a number that has remained unchanged since 2005. However, the dog *population* has grown from 5.3 million in 2005 to 5.5 million in 2009. Current estimates for 2010 indicate that the dog population is unchanged.

- Ownership of smaller dogs is becoming more widespread, because, as opposed to larger dogs, owners can treat them more like children.

- In 2009, German dog owners purchased prepared dog food over non-prepared, 60% of the time.

- Dog treats and mixers, with an estimated Cumulative Average Growth Rate (CAGR) of 15.5% between 2005 to 2010, had the greatest *volume growth* in the dog food/treat industry in Germany. Following closely behind was dry dog food with a CAGR of 14.9% over the same time frame. Wet dog food also experienced growth with a CAGR estimate of 9.1% from 2005-2010.

- When taking a look at *value growth* between 2005 to 2010, we see a CAGR of 21.2% for dry dog food, followed by 16.8% for dog treats/mixers, and a CAGR of 11.5% in value for wet dog food.



Source: *Euromonitor International*

Germany - Sales of Dog Food by Type: Value 2005-2010 in US $ millions

	2005	2006	2007	2008	2009	2010
Dog Treats and Mixers	323.5	328.5	341.8	354.3	365.3	378
Dry Dog Food	489.7	501.8	524.4	553.6	572.7	593.6
Wet Dog Food	454.2	448.4	466	482.3	493.4	506.1
Dog Food	1,267.20	1,278.50	1,334.90	1,390.10	1,431.30	1,478.40

Source: *Euromonitor International*

Germany - Dog Food by Price Band 2009

Sector	Item	Price range per kg [US $]
Wet Dog Food	Super Premium	Above 7.87
	Standard Premium	6.56 - 7.85
	Standard	3.93 - 6.54
	Economy	Below 3.92
Dry Dog Food	Super Premium	Above 7.87
	Standard Premium	5.90 - 7.85
	Standard	3.28 - 6.43
	Economy	Below 3.8

Source: *Euromonitor International*

Germany - Forecast Sales of Dog Food by Type: Volume 2011-2015

'000 Tonnes	2011	2012	2013	2014	2015
Dog Treats and Mixers	45.6	46.3	47	47.8	48.4
Dry Dog Food	292	300	308.1	315.8	323
Wet Dog Food	295	299.4	303	306.3	309.4
Total Dog Food	632.6	645.7	658.2	669.9	680.9

Source: *Euromonitor International estimates*

Germany - Forecast Sales of Dog Food by Type:
% Volume Growth 2010-2015

% Volume Growth	2014/15	2010-15 CAGR	2010/15 TOTAL
Dog Treats and Mixers	1.4	1.7	8.6
Dry Dog Food	2.3	2.6	13.7
Wet Dog Food	1	1.4	6.9
Total Dog Food	1.6	2	10.2

Source: *Euromonitor International estimates*

Source: *Mintel*

Germany - Forecast Sales of Dog Food by Type: Value 2011-2015

EUR million	2011	2012	2013	2014	2015
Dog Treats and Mixers	377.9	383.9	389.8	394.7	399.4
Dry Dog Food	599.7	617.9	635.7	651.6	665.8
Wet Dog Food	506.2	515.4	522.5	528	532.6
Total Dog Food	1,483.80	1,517.40	1,548.30	1,574.70	1,598.00

Source: *Euromonitor International estimates*

Germany - Forecast Sales of Dog Food by Type:
% Value Growth 2010-2015

% Constant Value Growth	2010-15 CAGR	2010/15 TOTAL
Dog Treats and Mixers	1.6	8.1
Dry Dog Food	2.8	14.8
Wet Dog Food	1.5	7.7
Total Dog Food	2	10.7

Source: *Euromonitor International estimates*

DOG FOOD COMPETITORS

Germany - Top Dog Food Brand Shares 2006-2009 - % retail sales

Item	Company	2006	2007	2008	2009
Fressnapf	Fressnapf Tiernahrungs GmbH	13	13.2	13.7	13.8
Pedigree	Mars Deutschland GmbH	-	13.6	13.9	13.8
Frolic	Mars Deutschland GmbH	-	7.8	8	7.9
Purina	Nestlé Purina Petcare Deutschland GmbH	5.4	5.3	5.4	5.3
Aldi	Aldi Einkauf GmbH & Co oHG	5.1	5.2	5.2	5.3
Chappi	Mars Deutschland GmbH	-	3.8	3.9	4
Eukanuba	Iams Pet Food GmbH & Co KG	3.6	3.6	3.6	3.7
Rewe	Rewe Zentral AG	5.3	5.5	5.6	3.7
Royal Canin	Mars Deutschland GmbH	-	3.8	3.6	3.6
Cesar	Mars Deutschland GmbH	-	3.5	3.6	3.6
Gimborn	H Von Gimborn GmbH	3.7	3.5	3.5	3.5
Vitakraft	Vitakraft-Werke Wührmann & Sohn	2.3	2.3	2.3	2.3
Dog Chow	Nestlé Purina Petcare Deutschland GmbH	1.6	1.6	1.6	1.6
Hill's Science Plan	Hill's Pet Nutrition GmbH	1.2	1.3	1.3	1.3
Matzinger	Nestlé Purina Petcare Deutschland GmbH	2.4	0.9	0.9	1
Purina ONE	Nestlé Purina Petcare Deutschland GmbH	0.5	0.5	0.8	0.8
Beneful	Nestlé Purina Petcare Deutschland GmbH	0.4	0.5	0.6	0.6
Loyal	Mars Deutschland GmbH	-	0.5	0.5	0.4
Mixer	Mars Deutschland GmbH	-	0.3	0.3	0.3
Other Private Label	Other Private Label	11.1	10.7	9.8	9.8
Others	Others	9.5	12.7	12.1	13.6

Source: *Euromonitor International estimates*

Germany - Dog Treats Brand Shares 2006-2009

% Retail Value	Company	2006	2007	2008	2009
Purina Snacks	Nestlé Purina Petcare Deutschland	21.5	21.6	21.7	21.6
Pedigree	Mars Deutschland GmbH	-	21.3	21.3	21.3
Gimborn	H Von Gimborn GmbH	14.9	14.2	14.1	14
Fressnapf	Fressnapf Tiernahrungs GmbH	8.4	8.9	9.2	9.5
Vitakraft	Vitakraft-Werke Wührmann & Sohn	7.9	7.8	7.7	7.8
Frolic	Mars Deutschland GmbH	-	4.2	4.1	5
Aldi	Aldi Einkauf GmbH & Co oHG	3.1	3.1	2.7	2.7
Rewe	Rewe Zentral AG	8.4	8.3	8.1	-
Pedigree	Masterfoods GmbH	22.5	-	-	-
Frolic	Masterfoods GmbH	3.4	-	-	-
Others	Others	9.7	10.7	11.1	18.2

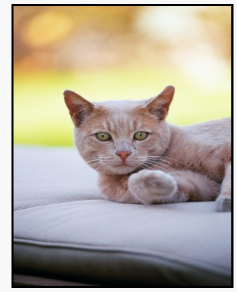
Source: *Euromonitor International estimates*

CAT FOOD

- As of 2009, 15% of German households owned a cat, a number that has remained unchanged since 2005. However, the cat population has grown from 7.6 million in 2005 to 8.3 million in 2009. Current estimates for 2010 places the cat population at approximately 8.5 million.

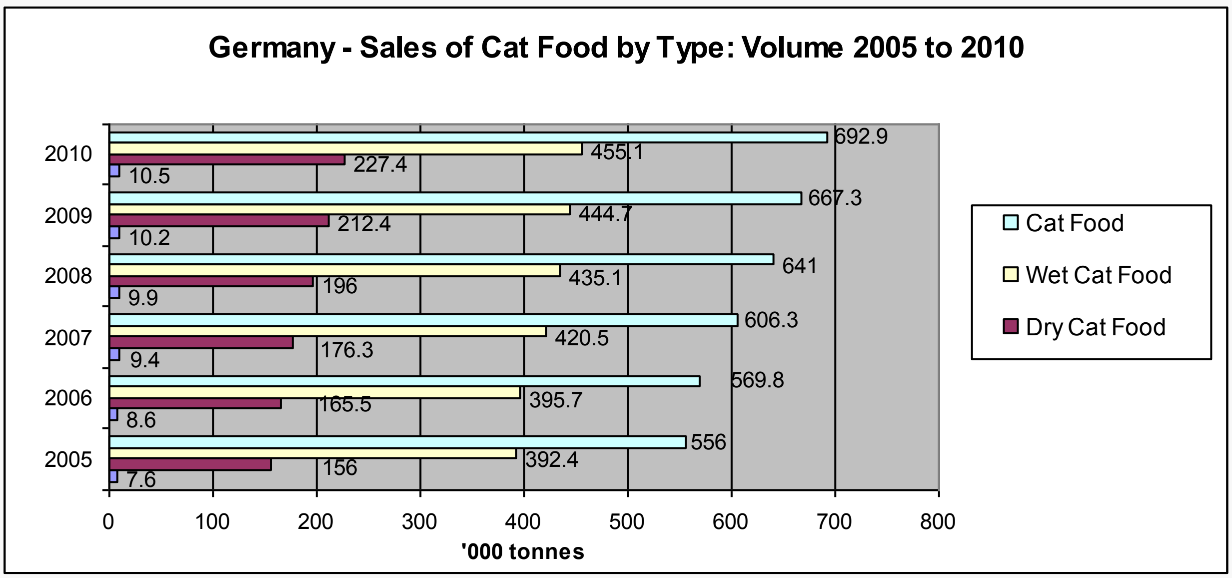
- In 2009, German cat owners purchased prepared cat food over non-prepared 97% of the time.

- Dry cat food, with an estimated CAGR of 7.8% between 2005 to 2010, had the greatest *volume growth* in the cat food/treat industry in Germany. Following closely behind was cat treats with a CAGR of 6.7% over the same time frame. Wet cat food experienced slight growth with a CAGR estimate of 3% from 2005 to 2010.



Source: *Shutterstock*

- Looking at *value growth* between 2005 to 2010, we see a CAGR of 8.1% for dry cat food, followed by 6.3% for cat treats/mixers, and a CAGR of 3.9% in value for wet cat food.



Source: *Euromonitor International*

Germany - Sales of Cat Food by Type: Value 2005-2010 in US $ millions

	2005	2006	2007	2008	2009	2010
Cat Treats and Mixers	126.7	141.5	154.5	161.6	167.4	172.1
Dry Cat Food	298.9	318.6	340	378.9	410.5	440.8
Wet Cat Food	1,027.50	1,052.90	1,132.20	1,177.90	1,210.30	1,243.90
Total Cat Food	1,453.20	1,513.10	1,626.60	1,717.90	1,788.40	1,856.90

Source: *Euromonitor International estimates*

Germany - Cat Food by Price Band 2009

Sector	Type	Price range per kg (US $)
Wet Cat Food	Super Premium	Above 10.5
	Standard Premium	6.41 - 10.46
	Standard	2.62 - 6.40
	Economy	Below 2.60
Dry Cat Food	Super Premium	Above 10.47
	Standard Premium	6.54 - 10.45
	Standard	3.27 - 6.53
	Economy	Below 3.79

Source: *Euromonitor International*

Germany - Forecast Sales of Cat Food by Type: Volume 2011-2015

'000 Tonnes	2011	2012	2013	2014	2015
Cat Treats and Mixers	10.8	11.1	11.5	11.8	12
Dry Cat Food	239.6	250.1	259.9	269.1	278.1
Wet Cat Food	463.2	470.8	478.9	487	495.1
Total Cat Food	713.6	732	750.2	767.8	785.2

Source: *Euromonitor International estimates*

Germany - Forecast Sales of Cat Food by Type: % Volume Growth 2010-2015

	2014/15	2010-15 CAGR	2010/15 TOTAL
Cat Treats and Mixers	2.4	2.8	14.7
Dry Cat Food	3.4	4.1	22.3
Wet Cat Food	1.7	1.7	8.8
Total Cat Food	2.3	2.5	13.3

Source: *Euromonitor International estimates*

Germany - Forecast Sales of Cat Food by Type: % Value Growth 2010-2015

	2010-15 CAGR	2010/15 TOTAL
Cat Treats and Mixers	2.1	11
Dry Cat Food	4.5	24.8
Wet Cat Food	1.7	8.9
Total Cat Food	2.5	12.9

Source: *Euromonitor International estimates*

Germany - Forecast Sales of Cat Food by Type: Value 2011-2015 - US millions

	2011	2012	2013	2014	2015
Cat Treats and Mixers	172.6	177.1	180.9	184.9	186.8
Dry Cat Food	456.4	478.7	499.5	518.8	537.5
Wet Cat Food	1,242.5	1,266.3	1,287.9	1,306.2	1,323.9
Total Cat Food	1,871.5	1,922.1	1,968.2	2,008.8	2,048.2

Source: *Euromonitor International estimates*

CAT FOOD COMPETITORS

Germany - Cat Food Brand Shares 2006-2009

% Retail Value RSP	Company	2006	2007	2008	2009
Whiskas	Mars Deutschland GmbH	-	18.9	18.4	17.8
Fressnapf	Fressnapf Tiernahrungs GmbH	14	15.5	16.6	17.5
Rewe	Rewe Zentral AG	8.6	8.7	8.7	8.7
Felix	Nestlé Purina Petcare Deutschland GmbH	6.1	6.5	7.3	7.8
Sheba	Mars Deutschland GmbH	-	8.4	8	7.6
Kitekat	Mars Deutschland GmbH	-	7.8	7.4	7.2
Aldi	Aldi Einkauf GmbH & Co oHG	5.7	6.3	6.7	6.9
Gourmet	Nestlé Purina Petcare Deutschland GmbH	4.6	4.6	4.6	4.5
Gimpet	H Von Gimborn GmbH	1.9	1.9	1.9	1.9
Hill's Science Plan	Hill's Pet Nutrition GmbH	1.2	1.6	1.6	1.5
Affinity Brekkies	Affinity Petcare Deutschland GmbH	2	1.7	1.6	1.4
Purina ONE	Nestlé Purina Petcare Deutschland GmbH	1.1	1.2	1.3	1.3
Vitakraft	Vitakraft-Werke Wührmann & Sohn	1.3	1.3	1.3	1.3
Royal Canin	Mars Deutschland GmbH	-	1.1	1.2	1.2
Iams	Iams Pet Food GmbH & Co KG	1	1	0.9	0.9
Eukanuba	Iams Pet Food GmbH & Co KG	0.8	0.8	0.8	0.9
Perfect Fit	Mars Deutschland GmbH	-	0.1	0.5	0.7
Whiskas	Masterfoods GmbH	19.7	-	-	-
Sheba	Masterfoods GmbH	8.9	-	-	-
Kitekat	Masterfoods GmbH	8.5	-	-	-
Royal Canin	Masterfoods GmbH	1.1	-	-	-
Other Private Label	Other Private Label	10.4	9.5	8.9	8.4
Others	Others	3.1	3	2.4	2.4

Source: *Euromonitor International estimates*

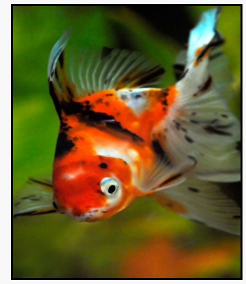
OTHER PET FOOD

- Within the other pet food category, Germans are shifting away from birds, the population of which declined to less than 3.5 million in 2009, towards fish and small mammals. In 2009, the fish population increased to 52.8 million (from 52.03 million in 2008), while the small mammal population reached 2.4 million (from 2.32 million in 2008). Hamsters and guinea pigs are particularly popular and are seen as ideal “starter pets” for small children. Fish are seen as a “man’s pets” as they are the only pets which one can ‘upgrade’, for example by buying a larger fish tank, accessories, plants, or stones.

- Fish food sales remain steady, increasing minimally by approximately 1% in 2009 to US $92.6 million. Small mammal/reptile food sales are expected to increase by over 2% to US $162.3 million in 2010.

- The German other pet food sector has seen a small increase in the demand for small mammal and fish food, however, growth in the bird food subsector has remained stable with value sales falling in 2009. This dip contributed to the less than stellar performance of the sector overall.

- When taking a look at sales volume, small mammal/reptile food reached 41,242.5 tonnes in 2009, up from 40,073.10 tones in 2008. Current estimates for 2010 show volume sales reaching 43,107 tonnes. In addition, small mammal/reptile food was the strongest sales performer in the other pet food sector, reaching US $158.8 million in 2009, and is predicted to reach $162.3 million in 2010.
- Small mammal/reptile foods' percentage of volume and value growth from 2005 to 2010 is predicted to reach 3%.
- The unit price of other pet food increased marginally from US $4.75 to US $4.78 per kilogram in 2009.
- The other pet food market is fragmented with limited brand loyalty and lack of perceived added-value amidst many branded products.
- Since 2000, the purchases of other pet food in Germany have migrated from being predominantly bought in pet shops (33%) to now being made through pet superstores (39%).



Germany - Other Pets Population 2005 - 2010

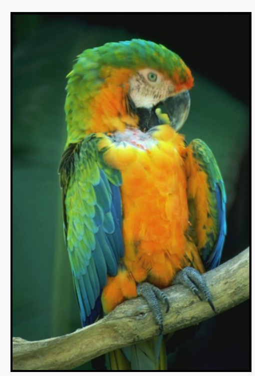
000s of Animals	2005	2006	2007	2008	2009	2010
Bird Population	3,800	3,750	3,500	3,495	3,470	3,420
Fish Population	53,500	53,800	54,200	52,032	52,800	53,850
Small Mammal Population	2,060	2,180	2,276	2,230	2,360	2,300
Reptile Population	140	160	180	160	165	175

Source: *Euromonitor International   Note 2010 numbers are estimates*

Germany - Sales of Other Pet Food by Type: Volume 2005-2010

Tonnes	2005	2006	2007	2008	2009	2010
Bird Food	28,703.30	25,960.50	23,649.30	24,657.40	24,791.40	24,572.30
Fish Food	3,899.90	4,022.30	4,138.60	4,093.20	4,090.90	4,102.70
Small Mammal/Reptile Food	36,398.70	38,074.40	38,658.80	40,073.10	41,242.50	42,107.30
Total Other Pet Food	69,001.80	68,057.20	66,446.70	68,823.80	70,124.70	70,782.20

Source: *Euromonitor International estimates*



Germany - Sales of Other Pet Food by Type: % Volume Growth 2005-2010

% Volume Growth	2009/10	2005-10 CAGR	2005/10 TOTAL
Bird Food	-0.9	-3.1	-14.4
Fish Food	0.3	1	5.2
Small Mammal/Reptile Food	2.1	3	15.7
Total Other Pet Food	0.9	0.5	2.6

Source: *Euromonitor International estimates*

Germany - Sales of Other Pet Food by Type: Value 2005-2010

US million	2005	2006	2007	2008	2009	2010
Bird Food	90	81	75.1	78.1	79.5	79.5
Fish Food	67	89.6	95.2	93.9	94.4	95
Small Mammal/ Reptile Food	142.5	149.5	152.1	158	161.9	165.5
Other Pet Food	321.9	323.1	322.4	330	335.7	340.1

Source: *Euromonitor*

Germany - Forecast Sales of Other Pet Food by Type: Volume 2011-2015

Tonnes	2011	2012	2013	2014	2015
Bird Food	24,401.60	24,256.00	24,063.00	23,728.30	23,280.60
Fish Food	4,133.70	4,153.10	4,194.30	4,230.00	4,261.10
Small Mammal/Reptile Food	42,847.00	43,552.20	44,211.90	44,740.30	45,305.90
Total Other Pet Food	71,382.40	71,961.20	72,469.10	72,698.60	72,847.60

Source: *Euromonitor International estimates*

Germany - Forecast Sales of Other Pet Food by Type: Value 2011-2015

US millions	2011	2012	2013	2014	2015
Bird Food	78.7	78.3	77.8	76.6	75.1
Fish Food	94.3	94.8	96.1	97.2	97.8
Small Mammal/Reptile Food	165.4	168	170.3	172	173.6
Total Other Pet Food	338.3	341.2	344.2	345.5	346.6

Source: *Euromonitor International estimates*

Germany - Forecast Sales of Other Pet Food by Type: % Volume Growth 2010-2015

% Volume Growth	2014/15	2010-15 CAGR	2010/15 TOTAL
Bird Food	-1.9	-1.1	-5.3
Fish Food	0.7	0.8	3.9
Small Mammal/Reptile Food	1.3	1.5	7.6
Other Pet Food	0.2	0.6	2.9

Source: *Euromonitor International estimates*

Germany - Forecast Sales of Other Pet Food by Type: % Value Growth 2010-2015

% Constant Value Growth	2010-15 CAGR	2010/15 TOTAL
Bird Food	-0.7	-3.6
Fish Food	1	4.9
Small Mammal/Reptile Food	1.3	6.9
Other Pet Food	0.8	3.9

Source: *Euromonitor International estimates*

OTHER PET FOOD COMPETITORS

Germany - Bird Food Brand Shares 2006-2009

% Retail Value RSP	Company	2006	2007	2008	2009
Vitakraft	Vitakraft	50.5	52.8	52.5	52.8
Fressnapf	Fressnapf Tiernahrungs GmbH	19.4	22	21.9	21.2
Trill	Mars Deutschland GmbH	-	6	6.4	6.6
Pitti	Pitti Heimtierprodukte Gmbh	5.2	5	4.8	5
Trill	Masterfoods GmbH	7.1	-	-	-
Other Private Label	Other Private Label	9.7	7.4	6.4	6.2
Others	Others	8.1	6.7	8	8.2

Source: *Euromonitor International estimates*

Germany - Fish Food Brand Shares 2006-2009

% Retail Value RSP	Company	2006	2007	2008	2009
Tetra Min	Tetra Werke GmbH	35.4	35.1	35.3	35.7
Vitakraft	Vitakraft-Werke Wührmann & Sohn	18	18.3	19.5	20.3
JBL	JBL GmbH & Co KG	7.6	7	7.3	7.4
Private label	Private Label	6.5	7.3	7.8	7.9
Others	Others	32.6	32.3	30.1	28.7

Source: *Euromonitor International estimates*

Germany - Small Mammal/Reptile Food Food Brand Shares 2006-2009

% Retail Value RSP	Company	2006	2007	2008	2009
Vitakraft	Vitakraft	17.2	17.2	17.1	18.6
Tetra	Tetra GmbH	11.2	11.3	11	9.7
JBL	JBL GmbH & Co KG	6.1	6.1	6	5.2
Private label	Private Label	3.8	3.9	4.2	4.5
Others	Others	61.8	61.5	61.8	62

Source: *Euromonitor International estimates*

ANNEX 'A'

This report analyses the market for Pet Food in Germany. For the purpose of the study, the market has been defined as follows:

- Dog food
- Cat food
- Other pet food

Dog and cat food sales are broken down by product type (wet/dry) and price platform. Examples of key brands in each price platform in Germany are as follows:

- Super premium: Purina ONE, Iams, Eukanuba
- Standard premium: Whiskas, Sheba, Royal Canin, Ceasar
- Mid-priced: Felix, Kitekat, Frolic, Pedigree
- Economy: Chappi, Loyal

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