



MARKET ACCESS SECRETARIAT Global Analysis Report

Pet Food Sales in Canada

May 2016



EXECUTIVE SUMMARY

Bird Seed

The value and volume sales of bird seed is on an on-going decline with a current compound annual growth rate (CAGR) of -3.8 (in volume) and -1.4 (in value). This decline in sales is deeply associated to the declining bird population and the high-upfront costs associated with exotic birds.

Cat Food

In 2014, cat food sale values grew by 1% and sales volume by 3% from the previous year, reaching value sales of C\$723.6 million. This modest increase in growth came from the cat treats and premium cat food.

Dog Food

In 2014, dog food value sales grew by 4% and sales volume by 2% from the previous year, reaching value sales of C\$322.3 billion. This continuous increase in growth came from premium dry dog food and dog treats.

Source: Euromonitor International, 2016

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PET FOOD

Bird Seed

The value and volume sales of bird seed is on an on-going decline with a current compound annual growth rate (CAGR) of -3.8 (in volume) and -1.4 (in value). This trend is deeply associated to the decreasing bird population and the high-upfront costs associated with exotic birds. However, the increased priced of bird seed helped to somewhat offset the rate of decline (Euromonitor International, 2015).

Despite this decline in sales, premium offerings continue to maintain their market share; while economic offerings continue to lose their share as cheaper private label offerings are making further progress. Increasingly, consumers are buying seed mixes and food selections that resemble the food birds would find in their natural habitat, thereby improving sales of higher-quality bird food. But the high-end segment remains limited (Euromonitor International, 2015).

The retail and volume sales are expected to decline with a CAGR of - 2%. This expected decline in bird seed sales can be explained by the negative trends in bird ownership and the requirements and restrictions placed on the importation of pet birds by federal agencies such as the Canadian Food Inspection Agency (Euromonitor International, 2015).

Historic Volume and Retail Sales of Bird Seed in Canada, From 2011 to 2015

Category	Units	2011	2012	2013	2014	2015 ^E	2011 – 15 CAGR*(%)
Bird Food	'000 tonnes	2,953.8	2,802.8	2,696.3	2,604.6	2,531.7	-3.8
	CAD millions	33.2	32.3	31.9	31.6	31.4	-1.4

*E= Estimate

Forecast Volume and Retail Sales of Bird Seed in Canada, From 2016 to 2020

Category	Units	2016	2017	2018	2019	2020	2016 - 20 CAGR*(%)
Bird Food	'000 tonnes	2,468.4	2,391.9	2,341.7	2,297.2	2,260.4	-2.2%
	CAD millions	31	30.5	29.9	29.3	28.9	-1.7%

Source for both: Euromonitor International, 2016

*CAGR: Compound Annual Growth Rate

Cat Food

In 2014, cat food value grew by 1% and volume by 3% from the previous year. This continuous increase in growth came from cat treats and premium cat food.

Dry cat food is the leading sub-category of cat food category with a CAGR of 3.5% in value for the forecasted period (2016 to 2020). This is in part due to the growing demand for natural, organic, and grain-free formulas (Euromonitor International, 2015).

Cat food is predicted to have a CAGR of 1% for both value and volume sales over the next forecasted period, with an anticipated value of C\$790 million (Euromonitor International, 2015).



Historic Volume Sales of Cat Food in Canada, in (000) Tonnes from 2011 to 2015

Category	2011	2012	2013	2014	2015 ^E	2011-15 CAGR* (%)
Total Cat Food	154,485.4	155,611.0	157,236.8	158,826.2	160,424.5	0.9
Cat Treats and Mixers	2,295.1	2,316.7	2,349.1	2,380.6	2,409.4	1.2
Dry Cat Food	102,687.5	104,201.6	105,854.9	107,408.8	108,910.0	1.5
Wet Cat Food	49,502.9	49,092.8	49,032.8	49,036.8	49,105.2	-0.2

*E= Estimate

Historic Retail Sales of Cat Food in Canada, in CAD Millions from 2011 to 2015

Category	2011	2012	2013	2014	2015 ^E	2011-15 CAGR* (%)
Total Cat Food	663.8	683.3	703.2	723.6	744.0	2.9
Cat Treats and Mixers	61.5	63.4	65.4	67.5	69.6	3.1
Dry Cat Food	384.5	399.6	413.1	427.2	441	3.5
Wet Cat Food	217.8	220.4	224.7	229	233.3	1.7

*E= Estimate

Forecast Volume Sales of Cat Food in Canada, in (000) Tonnes from 2016 to 2020

Category	2016	2017	2018	2019	2020	2016-20 CAGR* (%)
Total Cat Food	161,994.6	163,568.8	165,047.3	166,339.5	167,516.6	0.8
Cat Treats and Mixers	2,440.9	2,473.9	2,506.1	2,537.9	2,571.4	1.3
Dry Cat Food	110,324.0	111,750.7	113,087.8	114,216.4	115,258.6	1.1
Wet Cat Food	49,229.7	49,344.1	49,453.4	49,585.3	49,686.6	0.2

Forecast Retail Sales of Cat Food in Canada, in CAD Millions from 2016 to 2020

Category	2016	2017	2018	2019	2020	2016-20 CAGR* (%)
Total Cat Food	756.2	766.7	775.8	783.6	789.8	1.1
Cat Treats and Mixers	71.6	73.4	74.9	76.4	77.8	2.1
Dry Cat Food	449.6	457.3	464.2	470.2	475.2	1.4
Wet Cat Food	235	236	236.7	237	236.8	0.2

Source for all: Euromonitor International, 2016

*CAGR: Compound Annual Growth Rate

Dog Food

In 2014, dog food value grew by 4% and by 2% in volume from the previous year, reaching a C\$1.1 billion in value sales. Premiumisation and humanisation remain the key factors supporting value growth (Euromonitor International, 2015).

Premium dry dog food and dog treats were the top sub-categories in 2014, both with a CAGR of 4% and 5% (2011 to 2015). The average unit price of dog food increased by 2% in 2014



(Euromonitor International, 2015). This was mostly driven by the continued growth in the average unit price of premium dry dog food.

Dog food is predicted to have a CAGR of 2% in value sales over the next forecasted period from 2016 to 2020, with an anticipated value of C\$1,278.8 billion.

Historic Volume Sales of Dog Food in Canada, in (000) Tonnes from 2011 to 2015

Category	2011	2012	2013	2014	2015 ^E	2011-15 CAGR* (%)
Total Dog Food	307,301.3	311,340.0	316,599.2	322,326.9	327,888.7	1.6
Dog Treats and Mixers	12,219.0	12,476.5	12,750.5	13,017.8	13,320.6	2.2
Dry Dog Food	261,020.6	265,039.3	270,023.6	275,442.1	280,652.8	1.8
Wet Dog Food	34,061.7	33,824.2	33,825.1	33,867.0	33,915.3	-0.1

*E= Estimate

Historic Retail Sales of Dog Food in Canada, in CAD Millions from 2011 to 2015

Category	2011	2012	2013	2014	2015 ^E	2011-15 CAGR* (%)
Total Dog Food	989.7	1,027.00	1,066.50	1,107.70	1,150.50	3.8
Dog Treats and Mixers	218.8	228.8	240.6	251.7	265.3	4.9
Dry Dog Food	640.2	665.9	691.1	718.8	745.7	3.9
Wet Dog Food	130.7	132.4	134.7	137.2	139.5	1.6

*E= Estimate

Forecast Volume Sales of Dog Food in Canada, in (000) Tonnes from 2016 to 2020

Category	2016	2017	2018	2019	2020	2016-20 CAGR* (%)
Total Dog Food	331,885.0	336,073.7	340,219.0	343,912.2	347,462.8	1.2
Dog Treats and Mixers	13,586.6	13,844.4	14,149.8	14,443.7	14,722.1	2.0
Dry Dog Food	284,269.7	288,052.8	291,782.0	295,115.7	298,329.0	1.2
Wet Dog Food	34,028.7	34,176.6	34,287.3	34,352.8	34,411.7	0.3

Forecast Retail Sales of Dog Food in Canada, in CAD Millions from 2016 to 2020

Category	2016	2017	2018	2019	2020	2016-20 CAGR* (%)
Dog Food	1,180.2	1,208.9	1,234.3	1,257.7	1,278.8	2.0
Dog Treats and Mixers	278.0	290.9	302.2	313.2	323.9	3.9
Dry Dog Food	761.7	776.9	790.3	802.1	812.1	1.6
Wet Dog Food	140.4	141.1	141.8	142.4	142.8	0.4

Source for all: Euromonitor International, 2016

*CAGR: Compound Annual Growth Rate



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- ats-sea.agr.gc.ca

RESOURCES

Euromonitor International, Cat Food in Canada, 2015.

Euromonitor International, Dog Food in Canada, 2015.

Euromonitor International, Other Pet Food in Canada, 2015.



PET FOOD IN CANADA

Global Analysis Report

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