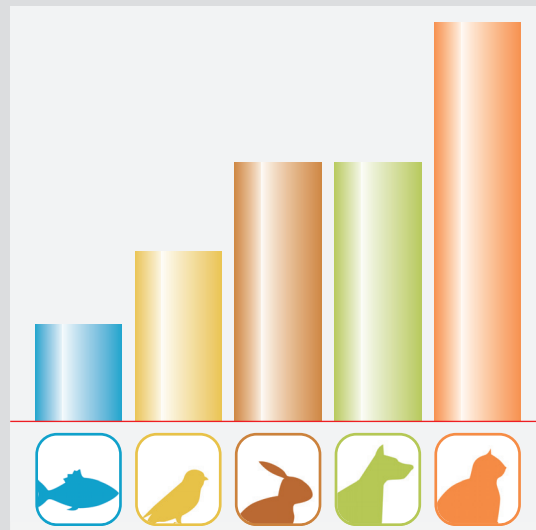


The German Pet Market



2010

Structure & Sales Data

Pet Care Market 2010

Prepared pet food

	Million €	Change*
Complete pet food	2,777	+ 0.8 %
Pet accessories	930	+ 0.7 %

TOTAL MARKET

3,707

+ 0.8 %

Market for Prepared Pet Food



Dog food

	Million €	Change*
Wet food	354	- 1.1 %
Dry food **	416	- 1.4 %
Snacks	332	+ 3.4 %
TOTAL	1,102	+ 0.1 %



Cat food

Wet food	940	+ 1.8 %
Dry food	312	+ 3.0 %
Snacks	183	+ 8.3 %
TOTAL	1,435	+ 2.9 %



Bird food

Complete & complementary food***

53 - 7.0 %



Fish food

Complete & complementary food (incl. pond food)

60 - 11.6 %



Other pet food

Compound food/snacks

127 - 4.5 %

TOTAL

2,777







+ 0.8 %

* Changes versus 2009

** Incl. semi-moist food

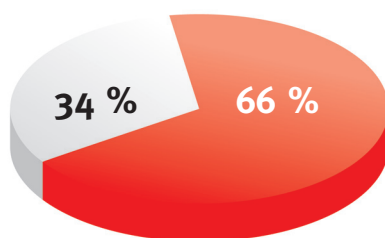
*** Plus approx. € 15 million in winter and bulk food at breeders

Market for Pet Accessories

	Million €	Change*
 Dogs	155	+ 3.3 %
 Cats	184	+ 2.8 %
 Cat litter	241	+ 1.7 %
 Pet birds	43	- 2.3 %
 Ornamental fish	201	- 3.9 %
 Small animals	106	+ 0.9 %
TOTAL	930	+ 0.7 %

Turnover by Sales Channel

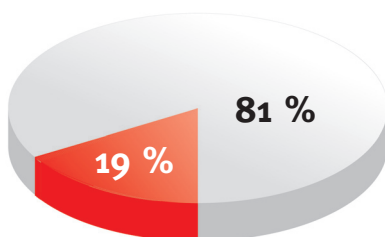
Prepared pet food



Million €

Retail**	1,821	66 %
Specialty trade***	956	34 %
TOTAL	2,777	100 %

Pet accessories

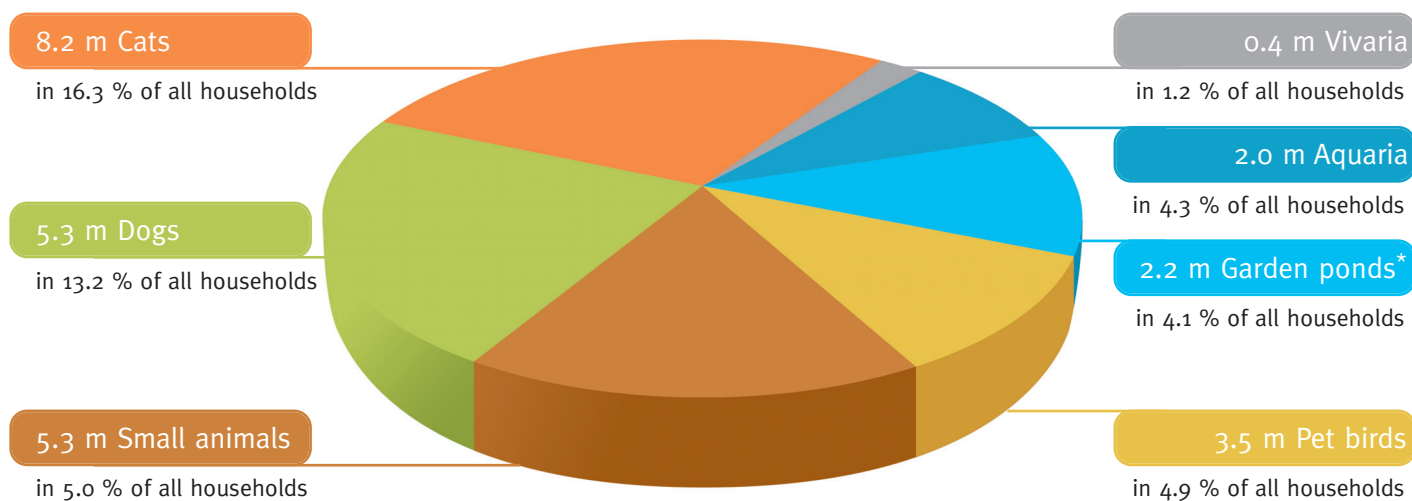


Retail**	175	19 %
Specialty trade***	755	81 %
TOTAL	930	100 %

Pet Care

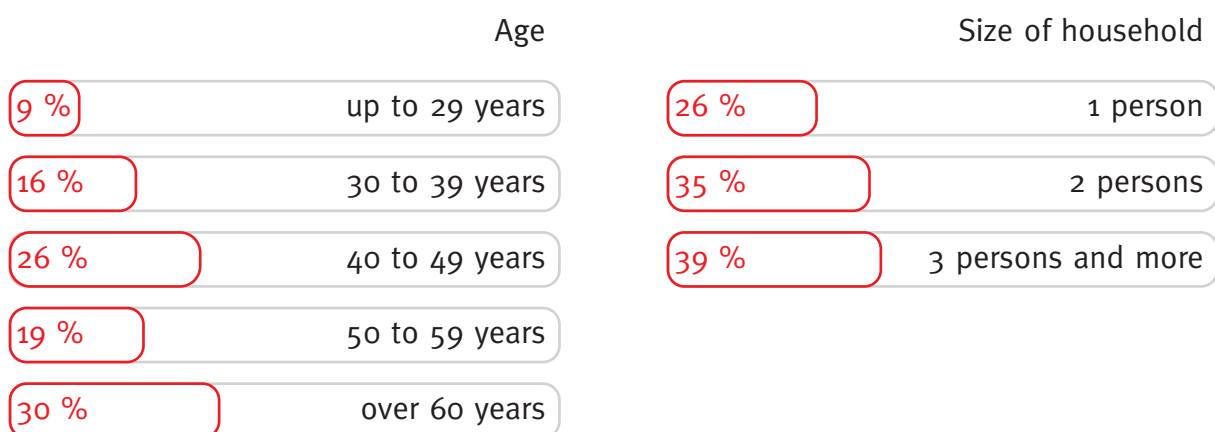
22.3 million pets (excl. fish and vivarium animals) live in German households. More than one third of all households in Germany have at least one pet.

German Households with Pets



* with ornamental fish

Socio-demographic Profile of Households with Pets



Market data was collected by IVH member companies based on an extended database. Therefore, direct comparison with IVH data for 2009 is possible only to a limited extent.

The population figures and the socio-demographic profile of households with pets were collected on behalf of IVH in a separate survey.

Legal notice:

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