



# Passport

## Other Pet Food in Greece

Euromonitor International

May 2020

This sample report is for illustration  
purposes only.

Some content and data have been  
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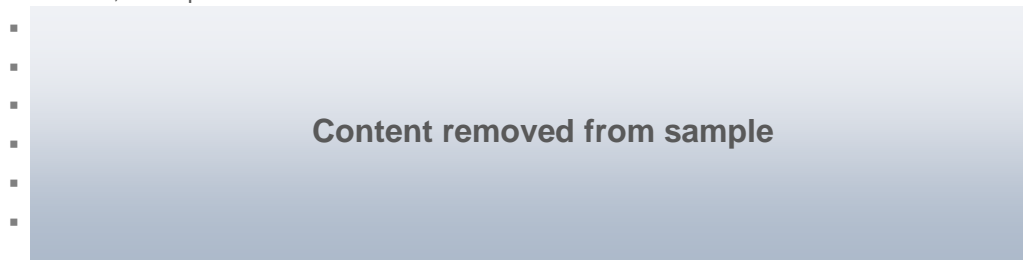
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# OTHER PET FOOD IN GREECE - CATEGORY ANALYSIS

## HEADLINES

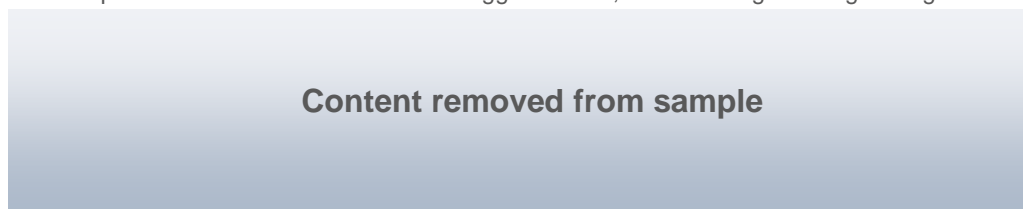
- In 2020, other pet food shows retail current value and volume declines of...



## PROSPECTS

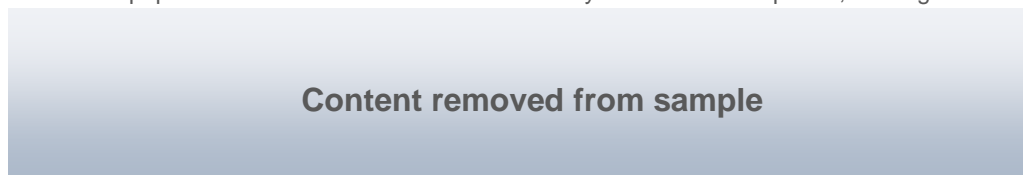
### Decline in Sales Reflects Falling Popularity of Other Pets

Other pet food in Greece continued to struggle in 2020, with all categories registering...



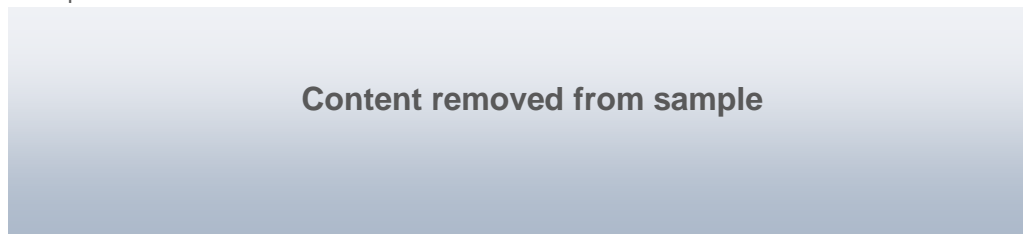
### Falling Populations and Home-made Food Impacts on Sales of Prepared Foods for Birds and Small Mammals

The bird population in Greece continued to fall slowly over the review period, leading to a...



### Relative Lack of Premiumisation in Other Pet Food Reflects More Specialised Demand

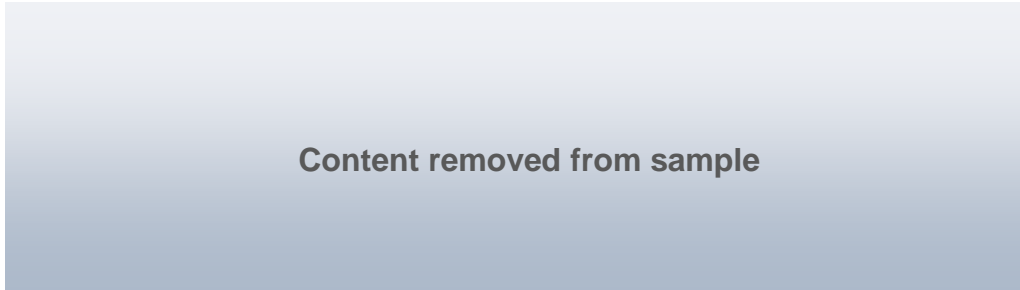
Premiumisation has been slow to emerge in other pet food in Greece. In fish food, for example...



## COMPETITIVE LANDSCAPE

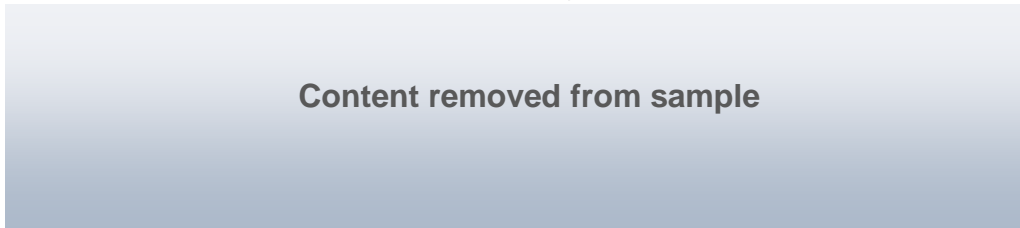
### Leaders Disturbed by Rise of Astron Chemicals Hellas in Fish Food

The overall competitive landscape in other pet food remained relatively stable in 2019.



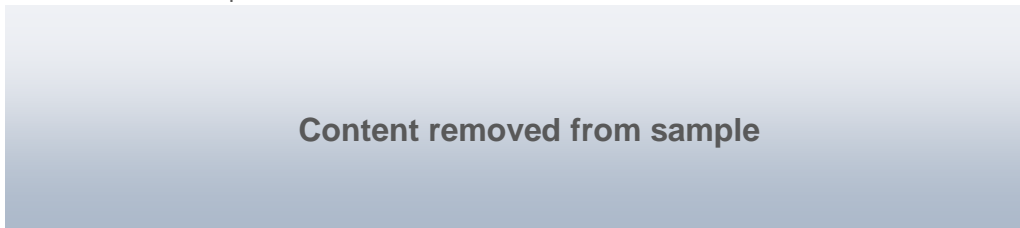
### Brit Finds Niche in Super-premium Rabbit Food

Rabbit food shows a polarisation between economy (plain) and super-premium varieties.



### Small Mammals Maintain Universal Appeal and Provide Scope for Product Variety

The small mammal population has remained static for a number of years, against a declining trend for birds and reptiles.



## CATEGORY INDICATORS

Table 1 Other Pet Population 2015-2020

'000s of animals	2015	2016	2017	2018	2019	2020
Bird Population	<b>Data removed from sample</b>					
Fish Population						
Reptile Population						
Small Mammal Population						
Other Pet Population						

Source: Euromonitor International from official statistics

## CATEGORY DATA

**Table 2** Sales of Other Pet Food by Category: Volume 2015-2020

Tonnes	2015	2016	2017	2018	2019	2020
Bird Food	<b>Data removed from sample</b>					
Fish Food						
Small Mammal/Reptile Food						
Other Pet Food						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 3** Sales of Other Pet Food by Category: Value 2015-2020

EUR million	2015	2016	2017	2018	2019	2020
Bird Food	<b>Data removed from sample</b>					
Fish Food						
Small Mammal/Reptile Food						
Other Pet Food						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 4** Sales of Other Pet Food by Category: % Volume Growth 2015-2020

% volume growth	2019/20	2015-20 CAGR	2015/20 Total
Bird Food	<b>Data removed from sample</b>		
Fish Food			
Small Mammal/Reptile Food			
Other Pet Food			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 5** Sales of Other Pet Food by Category: % Value Growth 2015-2020

% current value growth	2019/20	2015-20 CAGR	2015/20 Total
Bird Food	<b>Data removed from sample</b>		
Fish Food			
Small Mammal/Reptile Food			
Other Pet Food			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 6 LBN Brand Shares of Bird Food: % Value 2016-2019

% retail value rsp Brand (GBO)	Company (NBO)	2016	2017	2018	2019
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**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 7 LBN Brand Shares of Fish Food: % Value 2016-2019

% retail value rsp Brand (GBO)	Company (NBO)	2016	2017	2018	2019
-----------------------------------	---------------	------	------	------	------

**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 8 LBN Brand Shares of Small Mammal/Reptile Food: % Value 2016-2019

% retail value rsp Brand (GBO)	Company (NBO)	2016	2017	2018	2019
-----------------------------------	---------------	------	------	------	------

**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 9** Distribution of Other Pet Food by Format: % Value 2015-2020

% retail value rsp	2015	2016	2017	2018	2019	2020
Store-Based Retailing	<b>Data removed from sample</b>					
- Grocery Retailers						
-- Modern Grocery Retailers						
--- Convenience Stores						
--- Discounters						
--- Forecourt Retailers						
--- Hypermarkets						
--- Supermarkets						
-- Traditional Grocery Retailers						
- Mixed Retailers						
-- Department Stores						
-- Mass Merchandisers						
-- Variety Stores						
-- Warehouse Clubs						
- Non-Grocery Specialists						
-- Pet superstores						
-- Pet shops						
-- Health and Beauty Specialist Retailers						
--- Beauty Specialist Retailers						
--- Chemists/Pharmacies						
--- Drugstores/parapharmacies						
--- Other Health and Beauty Retailers						
-- Home and Garden Specialist Retailers						
--- Home Improvement and Gardening Stores						
--- Homewares and Home Furnishing Stores						
-- Other Non-Grocery Specialists						
Non-Store Retailing						
- Direct Selling						
- Homeshopping						
- E-Commerce						
Non-retail channels						
- Veterinary clinics						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 10** Forecast Sales of Other Pet Food by Category: Volume 2020-2025

Tonnes	2020	2021	2022	2023	2024	2025
Bird Food	<b>Data removed from sample</b>					
Fish Food						
Small Mammal/Reptile Food						



Other Pet Food

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 11 Forecast Sales of Other Pet Food by Category: Value 2020-2025

EUR million	2020	2021	2022	2023	2024	2025
Bird Food	<b>Data removed from sample</b>					
Fish Food						
Small Mammal/Reptile Food						
Other Pet Food						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 12 Forecast Sales of Other Pet Food by Category: % Volume Growth 2020-2025

% volume growth	2020/21	2020-25 CAGR	2020/25 Total
Bird Food	<b>Data removed from sample</b>		
Fish Food			
Small Mammal/Reptile Food			
Other Pet Food			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 13 Forecast Sales of Other Pet Food by Category: % Value Growth 2020-2025

% constant value growth	2020/2021	2020-25 CAGR	2020/25 Total
Bird Food	<b>Data removed from sample</b>		
Fish Food			
Small Mammal/Reptile Food			
Other Pet Food			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

# PET CARE IN GREECE - INDUSTRY OVERVIEW

## EXECUTIVE SUMMARY

### Rise in Pet Ownership and A Focus on Animal Welfare Bolster Pet Care

There has been continued growth in pet care in Greece in 2020. Cat ownership in urban areas has risen due to the relative ease of caring for cats and their better suitability to small apartment living.

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### Health and Wellbeing Drive Spending As Human Trends Spill Over Into Pet Care

The major trends impacting pet care in Greece in 2020 are humanisation and premiumisation.

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## Multinationals Maintain Lead While Smaller Companies Exploit More Polarised Demand

Two multinationals Nestlé Hellas and Mars Hellas continue to be the leading players in pet care in Greece...

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## Supermarkets Show Agility As E-commerce Continues To Make Inroads

Pet shops and pet superstores maintain their combined lead in sales of pet care in 2020...

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## Healthy Products and Scope for Innovation Point To A Stronger Performance for Pet Care Over the Forecast Period

Continued and increased growth in pet care is expected in Greece throughout the forecast period...

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## MARKET INDICATORS

Table 14 Pet Populations 2015-2020

'000s of animals	2015	2016	2017	2018	2019	2020
Bird Population	Data removed from sample					
Cat Population						
Dog Population						
Fish Population						
Reptile Population						
Small Mammal Population						
Pet Population						

Source: Euromonitor International from official statistics

## MARKET DATA

Table 15 Sales of Pet Food by Category: Volume 2015-2020

Tonnes	2015	2016	2017	2018	2019	2020
Dog and Cat Food	Data removed from sample					
Other Pet Food						
Pet Food						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 16 Sales of Pet Care by Category: Value 2015-2020

EUR million	2015	2016	2017	2018	2019	2020
Dog and Cat Food	Data removed from sample					
Other Pet Food						
Pet Food						
Cat Litter						
Pet Healthcare						
Pet Dietary Supplements						
Other Pet Products						
Pet Products						
Pet Care						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 17 Sales of Pet Food by Category: % Volume Growth 2015-2020

% volume growth	2019/20	2015-20 CAGR	2015/20 Total
Dog and Cat Food	Data removed from sample		

Other Pet Food  
Pet Food**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 18 Sales of Pet Care by Category: % Value Growth 2015-2020**

% current value growth

2019/20 2015-20 CAGR 2015/20 Total

Dog and Cat Food  
Other Pet Food  
Pet Food  
Cat Litter  
Pet Healthcare  
Pet Dietary Supplements  
Other Pet Products  
Pet Products  
Pet Care**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 19 NBO Company Shares of Pet Food: % Value 2015-2019**% retail value rsp  
Company

2015 2016 2017 2018 2019

**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 20 LBN Brand Shares of Pet Food: % Value 2016-2019**% retail value rsp  
Brand (GBO)

Company (NBO) 2016 2017 2018 2019

**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 21 NBO Company Shares of Dog and Cat Food: % Value 2015-2019

% retail value rsp Company	2015	2016	2017	2018	2019
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**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 22 LBN Brand Shares of Dog and Cat Food: % Value 2016-2019

% retail value rsp Brand (GBO)	Company (NBO)	2016	2017	2018	2019
-----------------------------------	---------------	------	------	------	------

**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 23 Penetration of Private Label in Pet Care by Category: % Value 2015-2020

% retail value rsp	2015	2016	2017	2018	2019	2020
--------------------	------	------	------	------	------	------

Pet Care  
Pet Food  
Pet Products

**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

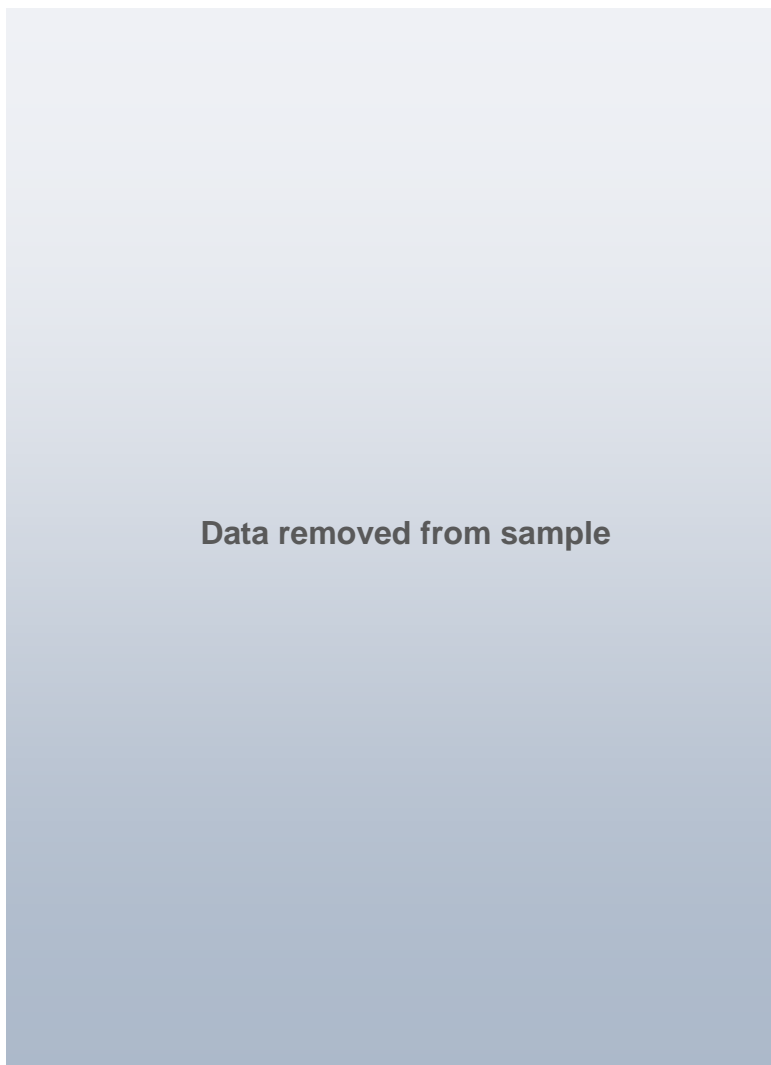
Table 24 Distribution of Pet Care by Format: % Value 2015-2020

% retail value rsp	2015	2016	2017	2018	2019	2020
--------------------	------	------	------	------	------	------

Store-Based Retailing  
- Grocery Retailers  
-- Modern Grocery  
Retailers

**Data removed from sample**

- Convenience Stores
- Discounters
- Forecourt Retailers
- Hypermarkets
- Supermarkets
- Traditional Grocery Retailers
- Mixed Retailers
- Department Stores
- Mass Merchandisers
- Variety Stores
- Warehouse Clubs
- Non-Grocery Specialists
- Pet superstores
- Pet shops
- Health and Beauty Specialist Retailers
- Beauty Specialist Retailers
- Chemists/Pharmacies
- Drugstores/parapharmacies
- Other Health and Beauty Retailers
- Home and Garden Specialist Retailers
- Home Improvement and Gardening Stores
- Homewares and Home Furnishing Stores
- Other Non-Grocery Specialists
- Non-Store Retailing
- Direct Selling
- Homeshopping
- E-Commerce
- Non-retail channels
- Veterinary clinics
- Total



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

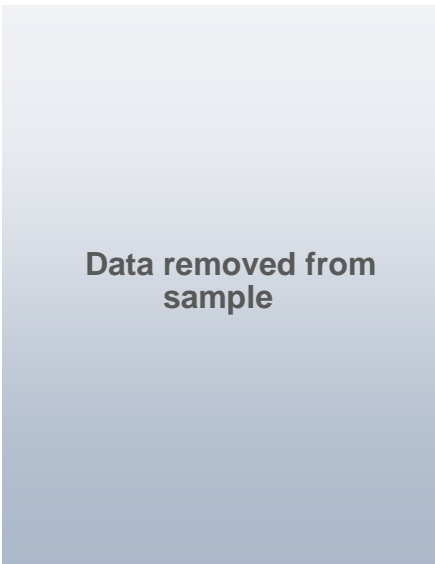
**Table 25**      Distribution of Pet Care by Format and Category: % Value 2020

% retail value rsp

- Store-Based Retailing
- Grocery Retailers
- Modern Grocery Retailers
- Convenience Stores
- Discounters
- Forecourt Retailers
- Hypermarkets
- Supermarkets
- Traditional Grocery Retailers
- Mixed Retailers
- Department Stores
- Mass Merchandisers

	PF	PP
	Data removed from sample	

- Variety Stores
- Warehouse Clubs
- Non-Grocery Specialists
- Pet superstores
- Pet shops
- Health and Beauty Specialist Retailers
- Beauty Specialist Retailers
- Chemists/Pharmacies
- Drugstores/parapharmacies
- Other Health and Beauty Retailers
- Home and Garden Specialist Retailers
- Home Improvement and Gardening Stores
- Homewares and Home Furnishing Stores
- Other Non-Grocery Specialists
- Non-Store Retailing
- Direct Selling
- Homeshopping
- E-Commerce
- Non-retail channels
- Veterinary clinics
- Total



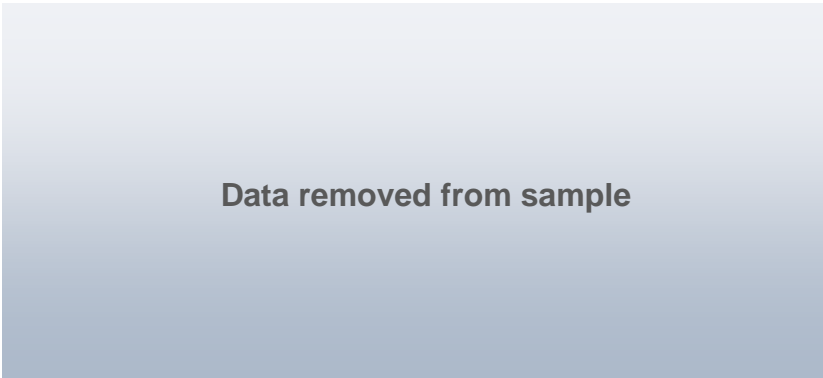
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources  
 Key: PF = pet food; PP = pet products

**Table 26** Distribution of Dog and Cat Food by Format: % Value 2015-2020

% retail value rsp	2015	2016	2017	2018	2019	2020
Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
-- Modern Grocery Retailers						
--- Convenience Stores						
--- Discounters						
--- Forecourt Retailers						
--- Hypermarkets						
--- Supermarkets						
-- Traditional Grocery Retailers						
- Mixed Retailers						
-- Department Stores						
-- Mass Merchandisers						
-- Variety Stores						
-- Warehouse Clubs						
- Non-Grocery Specialists						
-- Pet superstores						
-- Pet shops						
-- Health and Beauty Specialist Retailers						
--- Beauty Specialist Retailers						
--- Chemists/Pharmacies						
--- Drugstores/parapharmacies						
--- Other Health and Beauty Retailers						
-- Home and Garden						



- Specialist Retailers
- Home Improvement and Gardening Stores
- Homewares and Home Furnishing Stores
- Other Non-Grocery Specialists
- Non-Store Retailing
- Direct Selling
- Homeshopping
- E-Commerce
- Non-retail channels
- Veterinary clinics
- Total

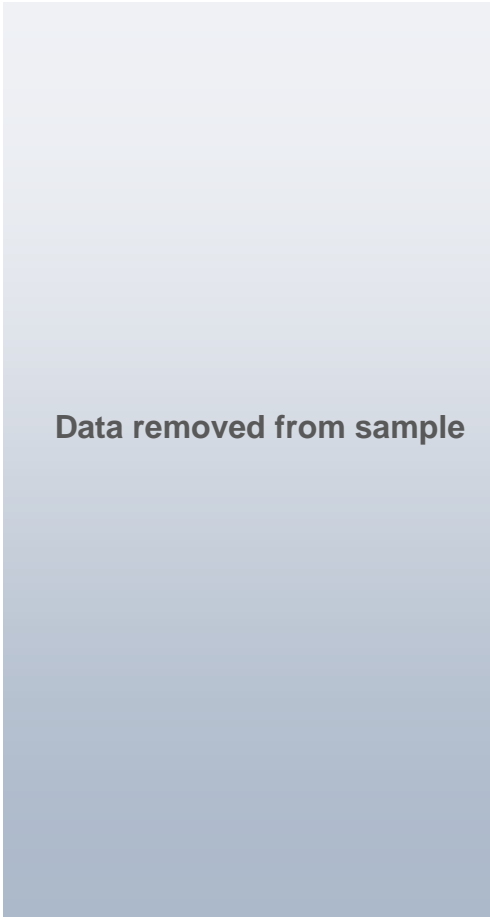


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 27** Distribution of Dog and Cat Food by Format and Category: % Value 2020

% retail value rsp

	CF	DF
Store-Based Retailing		
- Grocery Retailers		
-- Modern Grocery Retailers		
--- Convenience Stores		
--- Discounters		
--- Forecourt Retailers		
--- Hypermarkets		
--- Supermarkets		
-- Traditional Grocery Retailers		
- Mixed Retailers		
- Department Stores		
- Mass Merchandisers		
- Variety Stores		
- Warehouse Clubs		
- Non-Grocery Specialists		
-- Pet superstores		
-- Pet shops		
-- Health and Beauty Specialist Retailers		
--- Beauty Specialist Retailers		
--- Chemists/Pharmacies		
--- Drugstores/parapharmacies		
--- Other Health and Beauty Retailers		
-- Home and Garden Specialist Retailers		
--- Home Improvement and Gardening Stores		
--- Homewares and Home Furnishing Stores		
-- Other Non-Grocery Specialists		
Non-Store Retailing		
- Direct Selling		
- Homeshopping		
- E-Commerce		
Non-retail channels		
- Veterinary clinics		
Total		



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Key: CF = cat food; DF = dog food

**Table 28 Forecast Sales of Pet Food by Category: Volume 2020-2025**

Tonnes	2020	2021	2022	2023	2024	2025
Dog and Cat Food	<b>Data removed from sample</b>					
Other Pet Food						
Pet Food						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 29 Forecast Sales of Pet Care by Category: Value 2020-2025**

EUR million	2020	2021	2022	2023	2024	2025
Dog and Cat Food	<b>Data removed from sample</b>					
Other Pet Food						
Pet Food						
Cat Litter						
Pet Healthcare						
Pet Dietary Supplements						
Other Pet Products						
Pet Products						
Pet Care						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 30 Forecast Sales of Pet Food by Category: % Volume Growth 2020-2025**

% volume growth	2020/21	2020-25 CAGR	2020/25 Total
Dog and Cat Food	<b>Data removed from sample</b>		
Other Pet Food			
Pet Food			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 31 Forecast Sales of Pet Care by Category: % Value Growth 2020-2025**

% constant value growth	2020/2021	2020-25 CAGR	2020/25 Total
Dog and Cat Food	<b>Data removed from sample</b>		
Other Pet Food			
Pet Food			
Cat Litter			
Pet Healthcare			
Pet Dietary Supplements			
Other Pet Products			
Pet Products			
Pet Car			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

## CORONAVIRUS (COVID-19)

The data and analysis in this report were compiled in early 2020, weeks before the World Health Organization declared COVID-19 a global pandemic on 11 March 2020. As such, projections for 2020 and beyond will not capture the full implications of this pandemic on the pet care industry. Historic data have been fully updated and can be leveraged to gauge historic developments through 2019.

The rapid evolution of COVID-19 has significant implications for pet care in the short, medium and long term. The pandemic threatens supply chains, impacting the workforce and availability of key inputs. The recessionary fallout will test pet humanisation trends, particularly in severe downturn scenarios. At retail level, COVID-19 is accelerating an online shift as social distancing changes habits. Pet ownership trends are also changing as adoptions surge in some markets, while abandonments increase in others.

For the latest insight on COVID-19, readers can access strategic analysis and updates on the Passport system and [www.euromonitor.com](http://www.euromonitor.com). Please refer to The Impact of Coronavirus on Pet Care report as a starting point. Additional content will be added on a systematic basis as the situation develops.

## DEFINITIONS

This report analyses the market for pet care in Greece. For the purposes of the study, the market has been defined as follows:

- Dog food
- Cat food
- Other pet food
- Pet products

## SOURCES

Sources used during the research included the following:

### Summary 1 Research Sources

Official Sources	Data removed from sample
Trade Associations	
Trade Press	

Source: Euromonitor International