

FEDIAF | The Voice of the European Pet Food Industry



ANNUAL REPORT 2026





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Foreword by Rosa Carbonell, FEDIAF President

It is a pleasure to introduce FEDIAF's Annual Report for 2025/2026. Our newly released Facts & Figures, featured in the pages that follow, again underscore our industry's significant role: we are responsible for producing around 9.1 million tonnes of pet food worth approximately €29.3 billion, which feeds hundreds of millions of pets across Europe. This is a big responsibility, which we take seriously.

2025 was also a year of important internal progress, as we strengthened the Secretariat with the recruitment of a new Secretary General and a new Technical Director, bringing fresh expertise and reinforcing our capacity to serve members and engage with EU institutions.

As ever, all of this is grounded in our three pillars of action: ensuring the supply of safe and nutritious pet food, championing the pivotal role of pets in society, and driving sustainability from farm to bowl.



ENSURING THE SUPPLY OF SAFE AND NUTRITIOUS PET FOOD

The past year was marked by sustained and effective advocacy to maintain a supportive regulatory framework for the pet food industry. The protection and re-authorisation of key feed additives — including hydrocolloids such as xanthan gum, locust bean gum and acacia gum — remained a central priority. Through coordinated scientific and regulatory work, we helped safeguard the continued availability of these essential ingredients, avoiding market disruptions and contributing to a more transparent and predictable framework for operators.

We also updated and published the 2025 edition of the FEDIAF Nutritional Guidelines for cats and dogs, reinforcing their role as the cornerstone reference for the industry. New factsheets on healthy weight management and grain-free diets were released, providing science-based, accessible guidance for consumers and professionals alike. In parallel, new addenda to the Labelling Code on organic pet food and PARNUTS were finalised and submitted to the European Commission for review.

On trade, 2025 saw real progress. Following our advocacy, new Korean pet food import requirements were postponed by two years, preserving market access for EU manufacturers. We advanced discussions on establishing a dedicated EU health certificate for the Kingdom of Saudi Arabia, and worked throughout the year to ensure that processed pet food is recognised as a safe commodity during animal disease outbreaks.



PROMOTING THE ROLE OF PETS IN SOCIETY

FEDIAF continued to champion the important role that pets play in the lives of Europeans. Through our ongoing collaboration within Pet Alliance Europe — alongside AnimalhealthEurope, FVE and FECAVA — we have



reinforced the case for responsible pet ownership and the broader societal benefits of companion animals. Pet Power Night, co-organised with our Pet Alliance Europe partners in Brussels, again provided a highly visible platform to highlight these values to EU policymakers and stakeholders.

The Annual General Meeting and Congress in Madrid, held under the theme ‘Promoting Trust and Transparency in the Pet Food Sector’, brought together over 140 participants and reflected the energy, commitment and expertise of our membership. The quality of the discussions demonstrated why FEDIAF’s strength lies in the collective knowledge of those who contribute to its work.

We also made important strides in how we communicate externally. A renewed Public Affairs and Communication Strategy was approved, and FEDIAF’s LinkedIn presence grew by 25%, reaching over 320,000 total impressions. These efforts are helping to build trust and visibility for our industry across the policy and scientific landscape.



DRIVING SUSTAINABILITY FROM FARM TO BOWL

In February 2025, we were delighted to receive the formal endorsement by the European Commission of the updated Product Environmental Footprint Category Rules (PEFCR) for Pet Food. This milestone provides the sector with a harmonised, EU-recognised methodology for measuring environmental impacts and prepares our members for future green claims frameworks. We remain committed to ensuring that PEFCRs are formally recognised as the leading method of substantiation for environmental claims.

We also continued to defend the essential role of Category 3 animal by-products in the bioeconomy. These materials — safe, sustainable, and already part of the circular food chain — face growing pressure from renewable energy incentives. FEDIAF successfully contributed to maintaining Category 3 animal fats outside Annex IX of the Renewable Energy Directive and to securing their recognition as valuable co-products in the European Commission’s Bioeconomy Strategy.

Alongside this, we contributed to the ongoing discussions around the Circular Economy Act and the Packaging and Packaging Waste Regulation, ensuring that pet food sector specificities are properly reflected in implementation measures.

A COLLECTIVE VOICE — THANK YOU

This report offers a comprehensive overview of the initiatives delivered across FEDIAF’s Working Groups, committees and task forces. Our members’ expertise and engagement in these groups is immensely valuable, and I encourage anyone who is not yet involved to reach out and join us.

I want to extend my particular thanks to the whole FEDIAF Secretariat for their valuable daily work. Without the team in Brussels, none of our achievements would have been possible. A heartfelt thank you also to our Board of Directors, Chairs and expert members for their continued engagement and commitment to our joint efforts.

Thank you for your continued support. We look forward to building on this year’s progress together.

Rosa Carbonell
PRESIDENT, FEDIAF

A message from the Secretary General

Stepping into the role of Secretary General at the end of last year, I am grateful for the warm welcome received from across the European pet food community and its many partners. Joining FEDIAF at such a dynamic moment, as reflected throughout this Annual Report, is a privilege and a responsibility.

The achievements presented in this Report clearly demonstrate the breadth of work carried out across our Committees, Working Groups and Task Forces. They are the direct result of the commitment of our members, the strength of their expertise, and the professionalism of the Secretariat.

Over the past months, I have focused on listening and learning from members, policymakers, and from many organisations with whom we collaborate. This has provided valuable insight into the expectations placed on our sector and the opportunities ahead. Building on this, my priority has been to strengthen how we work together, improving internal processes and coordination, and ensuring leadership over our collective efforts in an increasingly complex regulatory landscape.

A strengthened and consolidated FEDIAF Secretariat will enable us to engage more effectively with EU institutions, policy makers, agencies, partners and other stakeholders, ensuring that our contributions remain science-based, solution-oriented and aligned with public policy objectives. The positive reception of our publications and events already illustrates the trust placed in FEDIAF as a reliable partner in discussions on feed safety, animal nutrition and health, sustainability and the circular economy. Our priority is to further build on that, as a transparent, constructive and forward-looking association.

FEDIAF will continue to champion a regulatory environment that recognises specificities of our sector, supports innovation and ensures the availability of safe, high quality pet food for millions of companion animals in Europe and beyond. We will also deepen our engagement on sustainability, data, and the role of pets in society - areas where expectations are rising and where our industry has much to contribute.

I am grateful for the trust placed in us and for the open dialogue and collaborative approach strengthening our ability to respond quickly and coherently to emerging challenges. It is exactly what characterizes our internal cooperation with members as well as our external stakeholder collaboration. We are thus sincerely excited to work alongside all of you, institutions, partners and experts, as we continue moving forward.

Milica Jevtić
FEDIAF SECRETARY GENERAL

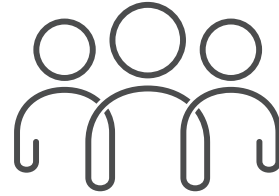


2025/2026 in Numbers



60

Meetings of Working Groups and Task Forces



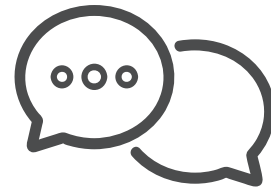
30

Meetings of Statutory and Governance Bodies



60+

Meetings with external Stakeholders



20+

Consultation Responses, Position Papers and Joint Letters



140+

Congress Attendees



10

Internal Newsletters



4

Featured Press Articles



3

Factsheets Published



4

Trainings Delivered

FEDIAF – A SNAPSHOT Events

Annual Congress 2025 Madrid, 12 June 2025



#PetPower

Pet Power Night

Brussels, 22 September 2025



FEDIAF – A SNAPSHOT

Member Engagement



The FEDIAF Secretariat visits the Waltham Petcare Science Institute and Mars Petcare's Care and Treats Site in Birstall, UK, April 2026.



Milica Jevtić and Giuseppe Luca Capodiecì visit Rondo and Bewital, Germany, February 2026.



Above Right: The FEDIAF Secretariat visits SOPRAL and La Normandise, France, August 2025.



Milica Jevtić and Franco Garbelotto attend the UK Pet Food Convention, UK, November 2025.



Networking and Collaboration



Delara Khodadad represents FEDIAF at the yearly ESVCN Congress, Leipzig, September 2025.

Milica Jevtić represents FEDIAF at the Responsible Pet Ownership event organised by Purina, Zagreb, November 2025.



Nordic Pet Food Conference

Team Building for the FEDIAF Secretariat, making Chocolate pralines, Brussels, December 2025

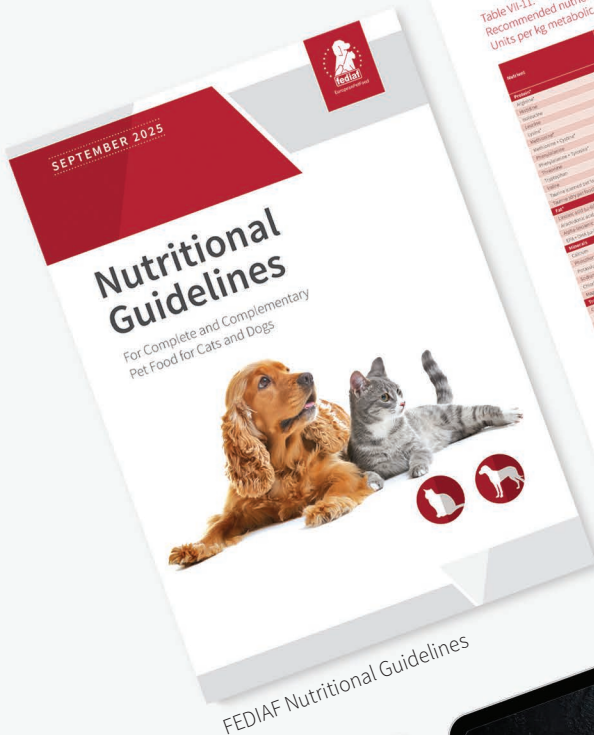
Above Right: Aleksandra Prandota is invited as a speaker to the Nordic Pet Food Conference, Gothenburg, September 2025



The FEDIAF Secretariat attends the FoodDrinkEurope Partnership, which included a display of pet food products. Brussels, February 2026.

FEDIAF – A SNAPSHOT

Publications



FEDIAF Nutritional Guidelines

Table VII-11. Recommended nutrient levels for complete food for dogs and cats
Units per kg metabolic bodyweight (dogs kg BW^{0.75}, cats kg BW^{0.67})

| Nutrient | Unit | Minimum | | Maximum | |
|---------------|-------|---------|------|---------|------|
| | | Dogs | Cats | Dogs | Cats |
| Crude protein | % | 10.0 | 10.0 | 32.0 | 32.0 |
| Crude fat | % | 5.0 | 5.0 | 20.0 | 20.0 |
| Crude fibre | % | 0.5 | 0.5 | 1.0 | 1.0 |
| Crude ash | % | 1.0 | 1.0 | 10.0 | 10.0 |
| Calcium | % | 0.08 | 0.08 | 0.18 | 0.18 |
| Phosphorus | % | 0.05 | 0.05 | 0.12 | 0.12 |
| Iron | mg/kg | 100 | 100 | 1000 | 1000 |
| Zinc | mg/kg | 100 | 100 | 1000 | 1000 |
| Copper | mg/kg | 10 | 10 | 100 | 100 |
| Selenium | mg/kg | 0.1 | 0.1 | 1.0 | 1.0 |
| Chlorine | % | 0.1 | 0.1 | 0.5 | 0.5 |
| Sulphur | % | 0.1 | 0.1 | 0.5 | 0.5 |
| Sodium | % | 0.1 | 0.1 | 0.5 | 0.5 |
| Potassium | % | 0.1 | 0.1 | 0.5 | 0.5 |
| Magnesium | % | 0.01 | 0.01 | 0.05 | 0.05 |
| Choline | mg/kg | 100 | 100 | 1000 | 1000 |
| Arginine | mg/kg | 100 | 100 | 1000 | 1000 |
| Protein | % | 10.0 | 10.0 | 32.0 | 32.0 |
| Fat | % | 5.0 | 5.0 | 20.0 | 20.0 |
| Fibre | % | 0.5 | 0.5 | 1.0 | 1.0 |
| Ash | % | 1.0 | 1.0 | 10.0 | 10.0 |
| Calcium | % | 0.08 | 0.08 | 0.18 | 0.18 |
| Phosphorus | % | 0.05 | 0.05 | 0.12 | 0.12 |
| Iron | mg/kg | 100 | 100 | 1000 | 1000 |
| Zinc | mg/kg | 100 | 100 | 1000 | 1000 |
| Copper | mg/kg | 10 | 10 | 100 | 100 |
| Selenium | mg/kg | 0.1 | 0.1 | 1.0 | 1.0 |
| Chlorine | % | 0.1 | 0.1 | 0.5 | 0.5 |
| Sulphur | % | 0.1 | 0.1 | 0.5 | 0.5 |
| Sodium | % | 0.1 | 0.1 | 0.5 | 0.5 |
| Potassium | % | 0.1 | 0.1 | 0.5 | 0.5 |
| Magnesium | % | 0.01 | 0.01 | 0.05 | 0.05 |
| Choline | mg/kg | 100 | 100 | 1000 | 1000 |
| Arginine | mg/kg | 100 | 100 | 1000 | 1000 |

Table VII-12. Impact of energy requirement on nutrient intake and minimum recommendations

| | 4 kJ/kg | 75 kJ/kg (ME) | 120 kJ/kg (ME) | 15 kg ME |
|--|------------------------------------|--------------------------------------|--------------------------------------|--------------------------------------|
| ME | 300 kcal | 180 kcal | 430 kcal | 124 kcal |
| Daily energy intake | 250 kcal | 47 g | 230 g | 30 g |
| ME intake (ME/kg BW ^{0.75} per day) | 63 g | 4.75 mg | 22.5 mg | 3.36 mg per 200 g BW ^{0.75} |
| Total daily requirement | 75 mg per 100 g BW ^{0.75} | 10.0 mg per 100 g BW ^{0.75} | 22.5 mg per 100 g BW ^{0.75} | 3.36 mg per 200 g BW ^{0.75} |
| Additional 2x level | | | | |

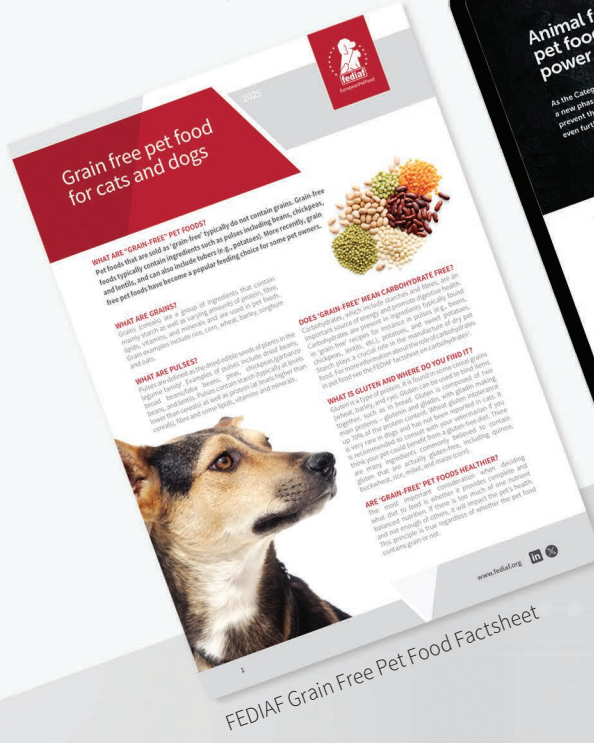
72.5. Impact of energy requirement on product formulation

Balanced nutrition ensuring adequate intakes of energy, protein, minerals and vitamins is essential for cats and dogs to ensure health and longevity in order to achieve the recommended intake of energy and nutrients. The product must be formulated to match these needs. FEDIAF recommendations are particularly based on ME. ME recommendations are provided in the table below. Major differences between FEDIAF and NRC systematic adjustment apply to all essential nutrients due to different assumptions on daily maintenance energy requirements.

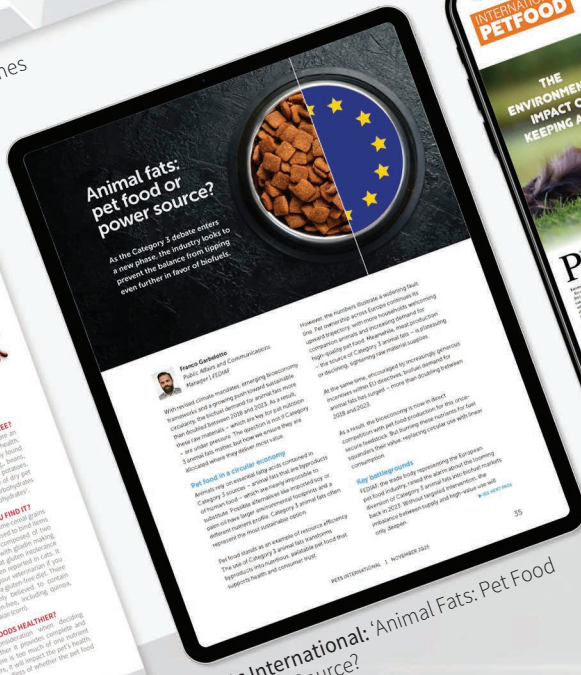
The NRC adult maintenance recommendations for dogs are based on an average maintenance energy requirement of 130 kcal/kg BW^{0.75} per day, which is the average energy intake observed in laboratory kennel dogs of various breeds.

FEDIAF however takes a different approach and uses an average energy requirement of 120 kcal/kg BW^{0.75} per day for 15 kg dogs as a basis for the adult maintenance recommendations, which is typical for dogs with 1.5 hours of low activity per day.

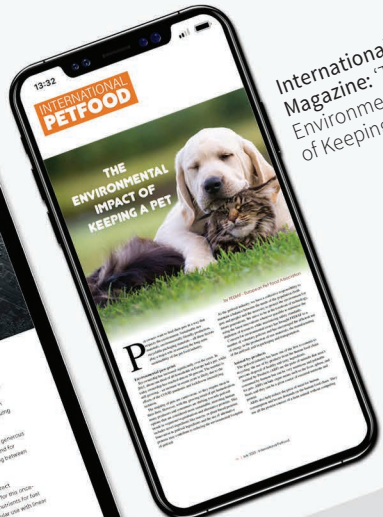
FEDIAF recommendations for normal active adult cats are based on a daily average maintenance energy requirement of 25 kcal/kg BW^{0.75} per day for 4 kg cats. For normal active indoor adult cats the average maintenance energy requirement is 20 kcal/kg BW^{0.75} per day. For 10 kg cats the average maintenance energy requirement is 15 kcal/kg BW^{0.75} per day. For 15 kg cats the average maintenance energy requirement is 12 kcal/kg BW^{0.75} per day. For 20 kg cats the average maintenance energy requirement is 10 kcal/kg BW^{0.75} per day. For 25 kg cats the average maintenance energy requirement is 8 kcal/kg BW^{0.75} per day. For 30 kg cats the average maintenance energy requirement is 7 kcal/kg BW^{0.75} per day. For 35 kg cats the average maintenance energy requirement is 6 kcal/kg BW^{0.75} per day. For 40 kg cats the average maintenance energy requirement is 5 kcal/kg BW^{0.75} per day. For 45 kg cats the average maintenance energy requirement is 4 kcal/kg BW^{0.75} per day. For 50 kg cats the average maintenance energy requirement is 3 kcal/kg BW^{0.75} per day. For 55 kg cats the average maintenance energy requirement is 2 kcal/kg BW^{0.75} per day. For 60 kg cats the average maintenance energy requirement is 1 kcal/kg BW^{0.75} per day.



FEDIAF Grain Free Pet Food Factsheet



Pets International: 'Animal Fats: Pet Food or Power Source?'



International Petfood Magazine: 'The Environmental Footprint of Keeping a Pet'

You can find out more information on our website. Please scan the QR Codes below with your camera phone.



Factsheets



Nutritional Guidelines

Social Media Presence

14.000+ followers (+25% growth in one year)

100+ posts

180 reposts

320.000 total impressions

8.000 reactions

200+ comments



FEDIAF Achievements 2025/2026

Across an exceptionally broad and fast-moving landscape, the Association delivered concrete wins that strengthened stability for the sector, protected access to essential raw materials, reduced compliance risks and ensured that EU decision-making remained grounded in science and proportionality.

KEY FEED ADDITIVES

FEDIAF remained actively engaged in re-authorisation processes for several critical feed additives, including hydrocolloids widely used by pet food manufacturers. Through coordinated scientific and regulatory work, FEDIAF helped avoid abrupt market disruptions, supported applicants through complex regulatory procedures, and contributed to a more transparent and predictable framework for the sector. Highlights included securing an 18-month period to generate new tolerance data for xanthan gum authorisation for dogs, and delivering tolerance studies for locust bean gum that demonstrated safety with no adverse effects.

PEFCR FOR PET FOOD

A significant milestone was the formal endorsement and publication by the European Commission of the updated Product Environmental Footprint Category Rules (PEFCR) for Pet Food. This provides the sector with a harmonised, EU-recognised methodology for assessing environmental impacts and prepares manufacturers for future environmental claims and substantiation frameworks. The endorsement reinforces the industry's leadership in transparent, science-based sustainability communication.

FEDIAF has also continued to engage with the European Commission and sectoral stakeholders on the revision of the Environmental Footprint (EF) recommendation, which will fundamentally reshape the approach to Product Environmental Footprint (PEF) in the coming years. The Association supports streamlining of the revision processes for PEFCRs, easier access to reliable datasets and a broad simplification of the EF method.

CATEGORY 3 ANIMAL BY-PRODUCTS

FEDIAF contributed to maintaining Category 3 animal by-products outside Annex IX of the Renewable Energy Directive in 2025, through sustained technical and policy engagement. The Association advocated for a

broader evaluation of renewable energy incentives and biomass flows, which was recognised by the European Commission in the Bioeconomy Strategy. This work supported consistent and balanced national implementation of the Directive, recognising the essential role of Category 3 animal fats for the pet food sector.

In view of the broader revision of the Renewable Energy Directive, FEDIAF continues to raise awareness towards the risk of diversion of valuable Category 3 animal fats towards biofuels and advocate for protections for their use in pet food as a critical raw material for the sector.

MARKET ACCESS TO KEY EXPORT DESTINATIONS

Following FEDIAF's advocacy Market access conditions to third countries improved over the past twelve months. New Korean import rules were postponed by two years (now applying from January 2028), giving EU manufacturers additional time to adapt. Progress was also made with the Kingdom of Saudi Arabia on establishing a dedicated EU health certificate for pet food. Considerable efforts were made throughout the year to secure recognition of processed pet food as a safe commodity during animal disease outbreaks, helping to remove unjustified trade barriers.

HARMONISED NUTRITION AND LABELLING FRAMEWORKS

The year saw the publication of an updated edition of the FEDIAF Nutritional Guidelines for cats and dogs, building on their long-standing role as the reference framework for the industry. New factsheets on weight management and grain-free diets were published to support consumer understanding and responsible pet ownership. In parallel, FEDIAF finalised new addenda to the Labelling Code, focusing on Organic Pet Food and PARNUTS, which are now undergoing review and approval by the European Commission.

A STRONGER EVIDENCE BASE FOR FUTURE DECISIONS

New data sources, internal surveys and technical outputs further strengthened FEDIAF's analytical foundation. The industry mycotoxins survey delivered robust, real-world data on contamination patterns in pet food. Targeted member surveys were used to assess the relevance of specific additives and materials and to defend against unnecessary labelling provisions. Together with updated tolerance data and progress on analytical methods, this work provided FEDIAF with robust evidence to support science-based, risk-proportionate regulatory advocacy.

STRENGTHENED STANDING WITH EU INSTITUTIONS

FEDIAF further strengthened structured engagement with relevant European Commission services through sustained working-level cooperation and regular senior-level exchanges, reinforcing FEDIAF's recognition as a key stakeholder for the feed sector and ensuring constructive involvement in policy discussions across multiple regulatory, technical and strategic files.



Working Group Highlights

Additives and Undesirable Substances



FEDIAF's Additives and Undesirable Substances Working Group brings together industry experts to support the safe use, authorisation and continued availability of feed additives and to address risks related to undesirable substances.

Through continuous engagement with the European Commission, EFSA and partner associations, the WG safeguards access to essential ingredients, supports innovation and ensures regulatory compliance underpinning safe, high-quality and nutritionally balanced pet food across Europe.

KEY ACTIVITIES

- Coordinated, financed and delivered tolerance studies for **locust bean gum** (LBG) in dogs and cats, demonstrating safety with no adverse effects and enabling dossier submission on time.
- Secured an 18-month period to generate new tolerance data for the **xanthan gum authorisation for dogs**, avoiding market loss of XG to produce complete pet food for dogs.
- Actively supported the authorisation of **acacia gum for use in cat and dogs** and the renewal of **potassium citrate** in the context of its reclassification from feed material to feed additive.

Analytical Science



The Analytical Methods Working Group provides FEDIAF members with specialized scientific and technical expertise on analytical methodologies relevant to feed and pet food. Its primary mission is to develop, validate, and harmonize robust analytical methods for assessing key nutrients, contaminants, and other constituents present in feed materials and finished products.

In addition to advancing methodological standards, the group offers technical guidance to FEDIAF's Nutrition, Scientific, and Regulatory Working Groups. It also supports external stakeholders and partners by sharing best practices, ensuring alignment with evolving regulatory requirements, and promoting consistency in analytical practices across the sector.

KEY ACTIVITIES

- Completed the **Inorganic Phosphorus Study**, including development of the study protocol, sending and assessing samples in internal as well as third-party labs.
- Completed the planning phase of the **Acrylamide Study**, defining scope, sampling strategy, and analytical considerations necessary for study launch.



Environmental Sustainability



The ESG leads FEDIAF’s work on environmental and sustainability policy, ensuring scientifically robust, practical and sector-aligned positions. It coordinates cross-industry engagement, anticipates regulatory risks and supports members in navigating evolving EU sustainability requirements. Its work strengthens FEDIAF’s credibility as the voice of the EU pet food industry on environmental matters.

KEY ACTIVITIES

- Delivered **consolidated FEDIAF input to the Commission on PEF/PEFCR** implementation and priorities for a methodological revision, and supported members with technical interpretation and data requirements.
- Provided **coordinated expertise on the Circular Economy Act and Packaging and Packaging Waste Regulation (PPWR) process**, helping ensure the feasibility of packaging, labelling, and reuse provisions for pet food.
- Continued efforts for the **recognition of Category 3 Animal By-Products (ABPs) as valuable co-products** in EU bioeconomy and climate policy discussions, mitigating diversion risks under Renewable Energy Directive (RED) III/Annex IX revisions.



Feed Materials and Trade



The Feed Materials and Trade Working Group brings together industry experts across two distinct yet connected streams.

The Feed Materials stream focuses on safeguarding the availability of plant- and animal-derived raw materials for the pet food sector, carefully assessing regulatory frameworks—particularly the Animal By-Products Regulations—and proposing amendments to ensure they remain fit for purpose for our industry.

The Trade stream focuses on exports to non-EU countries, identifying and addressing non-tariff trade barriers and restrictions; together, these complementary streams ensure regulatory decisions that enable and protect market access for FEDIAF members.

KEY ACTIVITIES

- Contribution to the fifth round of amendments to the **Feed Material Catalogue (FMC)** and engagement with the European Commission and Member States, to support regulatory clarity and continued use of key feed materials.
- Engagement with the EU FEED Chain Task Force under the **Circular Feed Platform** for publishing the Feed Circularity Catalogue (May 2025). The Catalogue provides regulatory options to promote sustainability in the feed industry’s supply chain in the long term.
- Active collaboration with DG TRADE, securing a two-year transition period of **Korea’s new pet food import requirements** (now enacted upon 1 January 2028), preserving market access and giving EU manufacturers time to adapt while discussions continue. Additionally, sustaining market access to the **Kingdom of Saudi Arabia** by supporting discussions on establishing clearer and more coherent sanitary requirements.

Working Group Highlights

Nutrition



Working closely with the Scientific Advisory Board, the Nutrition Working Group plays a central role in advancing the wellbeing of pets by promoting safe, nutritious, and palatable pet food grounded in the latest scientific evidence. The group ensures that the **FEDIAF Nutritional Guidelines** remain the cornerstone reference for pet nutrition in Europe and, increasingly, internationally.

By updating these guidelines in line with emerging science, the group helps maintain a level regulatory playing field and strengthens scientific cooperation between pet food manufacturers, veterinary professionals, academics, and regulatory authorities.

Their work supports industry alignment on key nutritional topics, fosters transparent engagement with policymakers, and contributes to the continuous improvement of nutritional standards for cats and dogs.

KEY ACTIVITIES

- Finalised and launched the 2025 FEDIAF Nutritional Guidelines, integrating new scientific evidence and ensuring alignment with current regulatory expectations.
- Developed and published updated factsheets on grain-free pet diets and on healthy weight management for cats and dogs, offering clear and practical guidance for industry representatives and consumers.



Product Communication



The Product Communication Working Group ensures that pet food labelling and communication across Europe remain consistent, legally compliant, and scientifically sound. By translating complex EU legislation into clear and practical industry guidance, the group supports FEDIAF members in meeting regulatory requirements while communicating transparently with consumers.

The group plays an active role in regulatory dialogues, contributing expert insights to discussions on labelling rules, claims, and emerging trends in consumer information. Through its focus on harmonisation and proportionality, it helps maintain a level competitive playing field, reinforces consumer trust in pet food products, and strengthens FEDIAF's contribution to a predictable regulatory environment.

KEY ACTIVITIES

- Finalised drafting of the **Labelling Code Addendum on Organic Pet Food Labelling** and **PARNUTS**, securing internal approval and initiating the formal process with the European Commission.
- Initiated a structured dialogue with the European Commission on **Hydrocolloids labelling**, creating a platform for industry-wide clarity on the appropriate classification and communication of these additives.





Small Pets



The Small Pets Working Group serves as FEDIAF's dedicated expert forum on nutritional, technical, and regulatory matters affecting small pet species. Its mandate is to ensure the nutritional adequacy, welfare, and safety of small pets by developing and maintaining species specific FEDIAF nutritional guidelines that reflect the latest scientific knowledge.

The group monitors and evaluates EU regulatory developments that may influence small pet nutrition, such as rules on feed additives, positive lists, and broader policy measures, and provides timely guidance to ensure members understand both the scientific and regulatory implications. Through this work, the group supports harmonised practices across the industry and positions FEDIAF as a reliable source of expertise on small pet care and nutrition.

KEY ACTIVITIES

- Launched the expert group drafting the **FEDIAF Fish Guidelines**, initiating the development of harmonised nutritional guidance for ornamental fish.

Communication

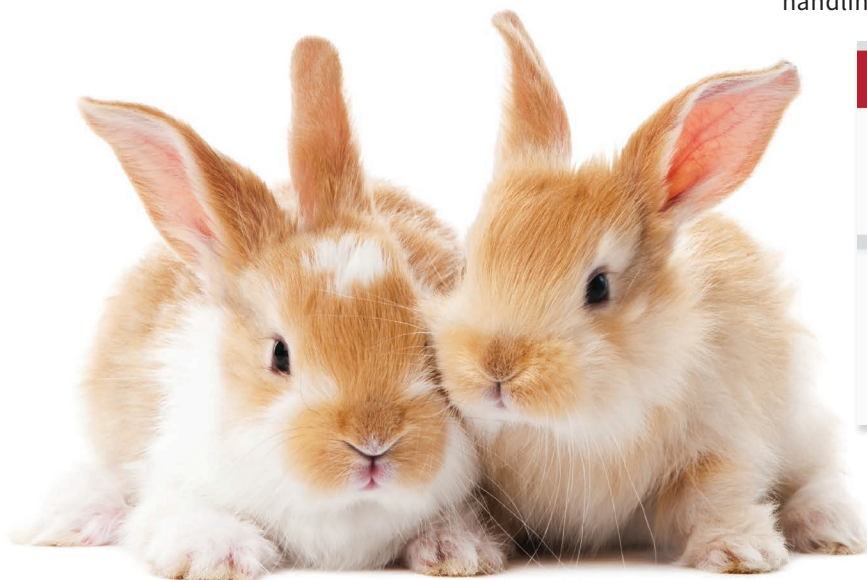


The Communication Working Group plays a leading role in shaping, coordinating and strengthening FEDIAF's internal and external communication. Its mandate covers the development of coherent messaging, proactive reputation management, media coordination, brand alignment and horizontal support to all technical Working Groups.

The Communication Working Group ensures that FEDIAF communicates with clarity, consistency and credibility – towards members, EU institutions, partner organisations, media and the public—while enabling the Secretariat and Working Groups to operate with a unified voice.

KEY ACTIVITIES

- Launched **FEDIAF Insights**, a new flagship internal information format providing consistent, timely updates on the Secretariat's activities, cross-WG dossiers and institutional developments.
- Implemented a renewed **Public Affairs & Communication Strategy**, establishing a clear framework for proactive engagement and message discipline.
- Strengthened **FEDIAF's external profile** through increased LinkedIn activity, improved visibility for key events (including Pet Power Night, ESCVN launch and the AGM/Congress), and more structured media handling.



FEDIAF at a Glance

Mission

FEDIAF is the trade body representing the European pet food industry. Its members include 15 national trade associations and five companies, covering 18 European countries and representing about 95% of the Industry.


Our mission is to be the credible and responsible voice of the European pet food industry, collaborating with authorities, regulators, academics and civil society to achieve favourable conditions for the supply of safe, nutritious and palatable products – while promoting responsible pet ownership, animal wellbeing, the social role of pets, and sustainable development.



**SUSTAINABILITY GUIDES
HOW WE OPERATE**
From farm to bowl,
we work to use resources
responsibly and reduce
our environmental
footprint at every
step.



**SCIENCE DRIVES
EVERYTHING WE MAKE**
Our technical expertise
ensures every product
meets the highest standards
of safety and nutrition
– because pets deserve
nothing less.



**SOCIETY SHAPES WHY
WE EXIST**
Pets enrich human lives
in ways that are hard to
quantify – as companions,
protectors and sources
of connection. We take
our responsibility to their
welfare seriously.



Governance

FEDIAF operates through a structured, multi-tiered governance framework ensuring effective strategic leadership, broad member representation, and rigorous technical oversight.

BOARD OF DIRECTORS

The governing body of the Association. It provides overall strategic direction, oversees key institutional decisions, and ensures organisational accountability.

EXECUTIVE COMMITTEE (EXCO)

The central forum for strategic guidance and coordination. Each member association is represented, ensuring that discussions and decisions reflect the perspectives and priorities of the full membership.

REVIEW COMMITTEE

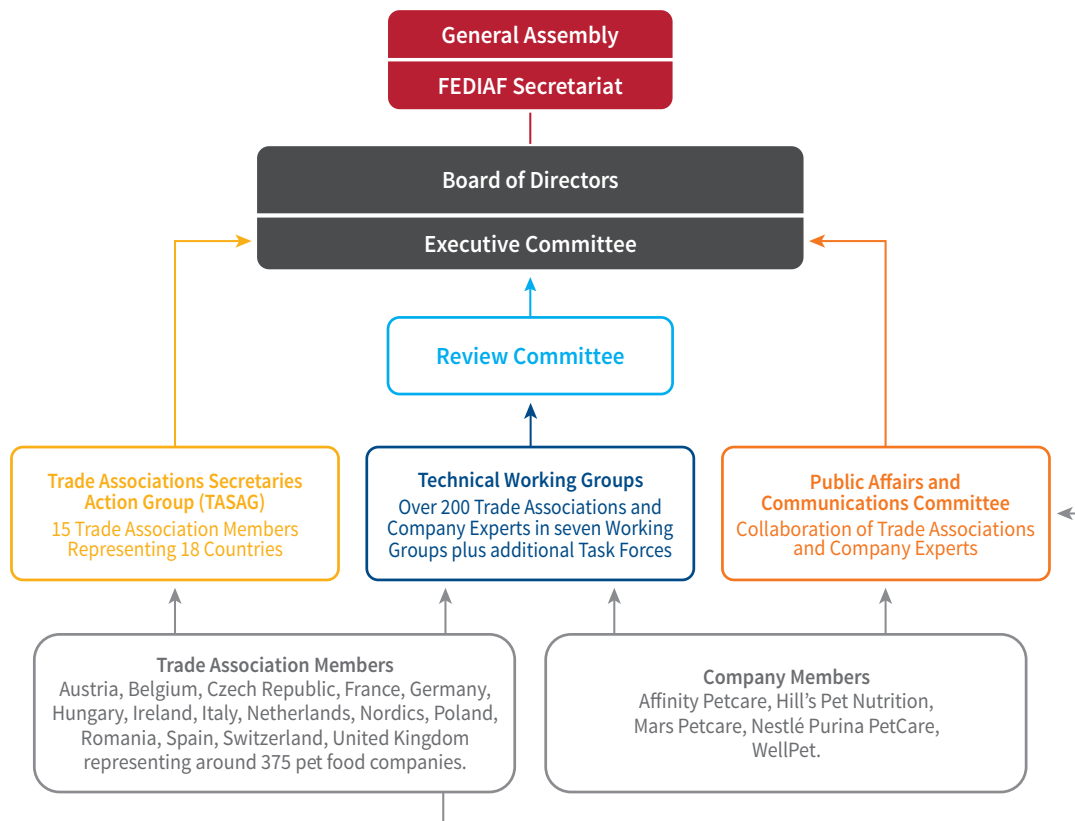
The Association’s core technical coordination body. It facilitates alignment across Working Groups, supports coherence across technical dossiers, and provides guidance on cross-cutting issues.

WORKING GROUPS AND TASK FORCES

Expert bodies operating under the coordination of the Review Committee. Working Groups focus on ongoing technical areas, while Task Forces are established on a time-limited basis to address specific or emerging topics.

TRADE ASSOCIATION SECRETARIES ACTION GROUP (TASAG)

A dedicated forum bringing together the Secretaries General of all national member associations. TASAG supports coordination, information exchange, and alignment between national associations and FEDIAF.



The FEDIAF Secretariat in 2026

FEDIAF's Secretariat supports the Association's governance, Working Groups and members by ensuring the effective coordination of technical, regulatory, public affairs and operational activities. The Secretariat acts as the central point of contact for EU institutions, stakeholders and partners, and provides continuity and expertise across all areas of work.



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FEDIAF members

FEDIAF has 15 members associations and five company members (Affinity Petcare, Hill's Pet Nutrition, Mars Petcare, Nestlé Purina PetCare and Wellpet), representing 18 countries.



öhtv
Österreichische Heimtierfuttermittel
Vereinigung
www.oehvt.at



BEPEFA
Belgian Pet food Association
www.bepefa.eu



SVPDZ
Sdruzeni vyrobcu potravy pro domaci zvirata
www.svpdz.cz



NPFA
Nordic Pet Food Association
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www.npfa.dk



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et autres animaux familiers
www.facco.fr



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Industrieverband
Heimtierbedarf (IVH) e.V.
IVH
Industrieverband Heimtierbedarf e.V.
www.ivh-online.de



FHFI
Federation of Hungarian Food
Industries
www.elelmiszeripar.hu



ibec
PFAl Pet food Association of Ireland
www.fooddrinkireland.ie
www.ibec.ie



ASSALCO
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per l'Alimentazione e la Cura degli
Animali da Compagnia
www.assalco.it



NVG
Nederlandse Voedingsindustrie
Gezelschapsdieren (NVG)
www.nvg-diervoeding.nl



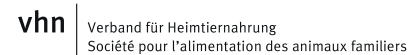
POLKARMA
Polish Pet Food Manufacturers'
Association
www.polkarma.pl



ARPAC
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VHN
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Swiss Pet Food Association
www.vhn.ch



UK Pet Food
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FACTS & FIGURES 2026



European Pet Food Data: Continuity, Rigour and Methodological Growth

FEDIAF's Facts & Figures are highly regarded throughout Europe and frequently referenced by authorities, stakeholders, and the media. We are delighted that the European Commission cites our pet population data during discussions, alongside numerous pet industry and veterinary colleagues.

With this recognition comes the responsibility to ensure our approach remains robust and thorough. We continue to work with external data experts at Soulor Consulting to meticulously review both pet population and market data, and this year Soulor has again managed the data collection process.

As per tradition, we have liaised with all 15 of our National Association members, who have supplied local population figures and market data—where available. The participating countries are listed in the Appendix (page 15). Soulor Consulting has conducted a rigorous review, aligning data and applying additional layers of verification against previous records, inflation figures, and other relevant metrics.

The country list remains the same as in the previous report, continuing to cover all of the European Union (EU), European Economic Area (EEA) and most of the remaining Council of Europe member states (41 of the 48 CoE members).

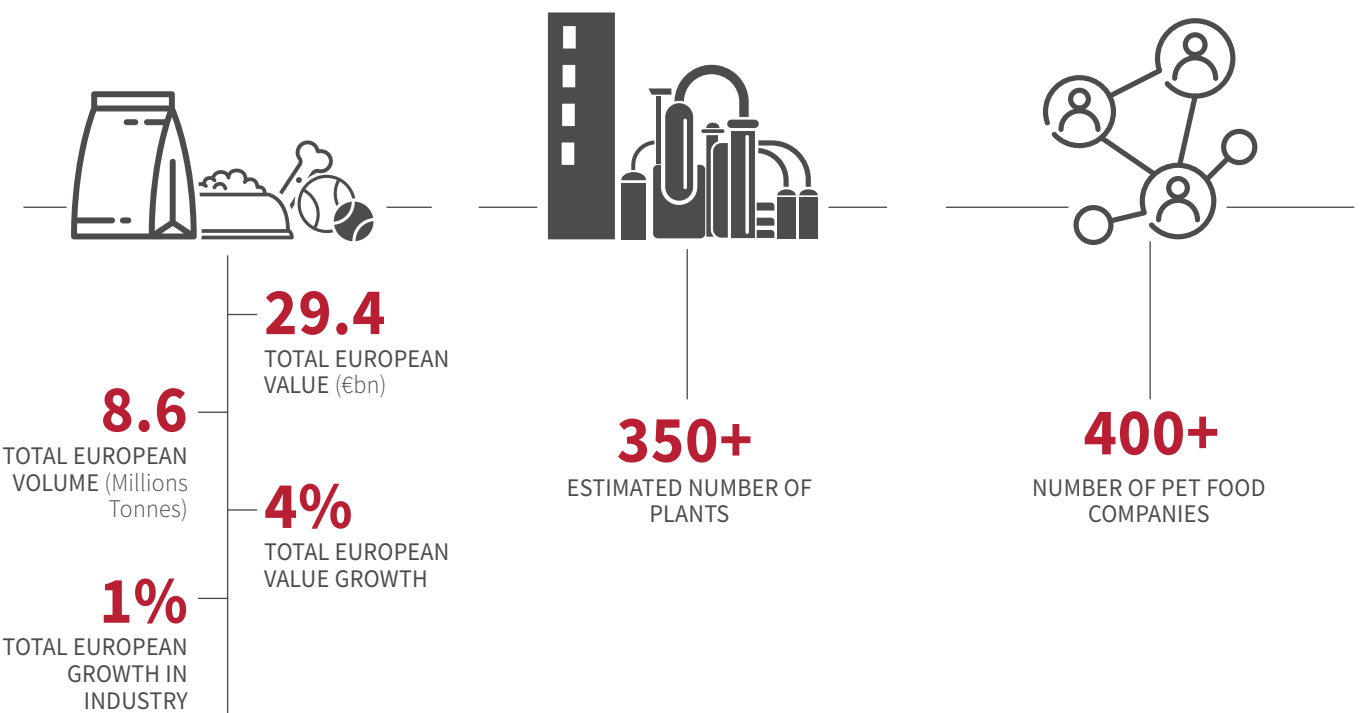
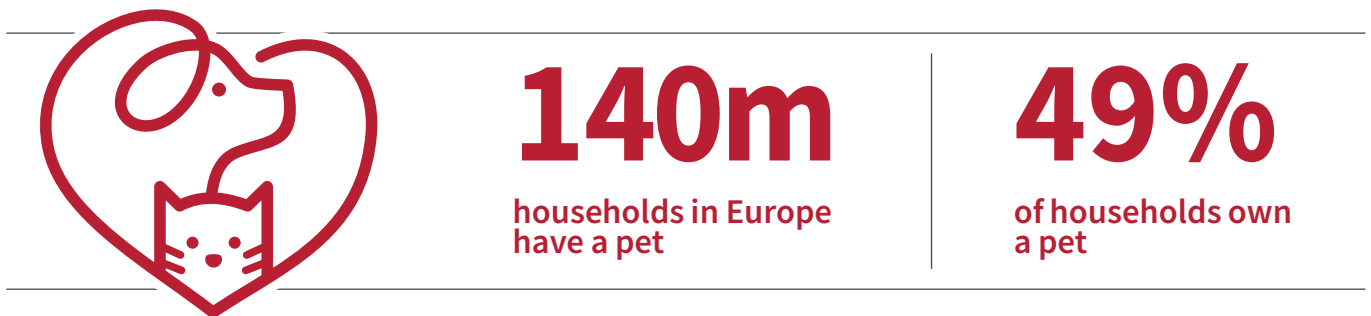
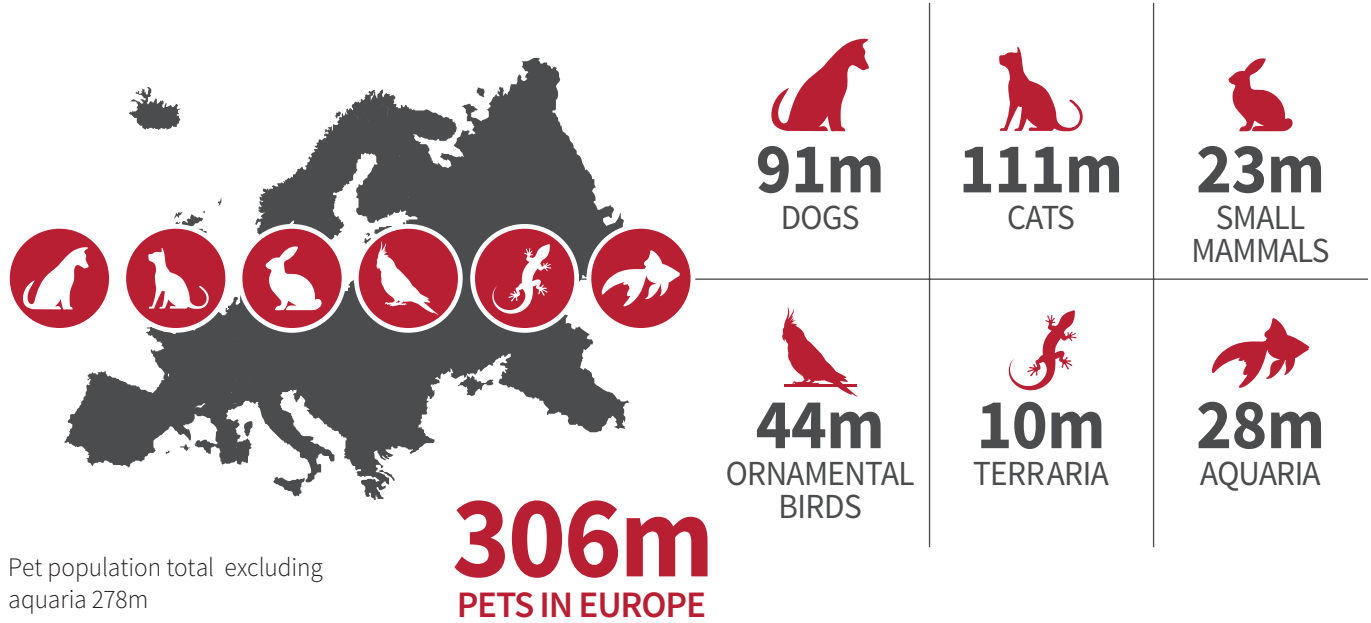
In line with our established methodology, we gather data from two years prior to publication — therefore, in 2026, we publish data from 2024*. We continue to consolidate and refine our methodology year on year, ensuring ever greater consistency and accuracy in how data is collected, estimated, and verified across all participating countries.

For further insights into our methodology, detailed notes are available in the Appendix, ensuring transparency and clarity in our data collection and analysis processes.





European Overview 2024



*Russia is no longer included and we have incorporated a set of new countries that were previously not included to ensure that the data covers all of the European Union (EU), European Economic Area (EEA) and most of the remaining Council of Europe member states (the report now covers 41 of the 48 CoE members). Details are available in the Appendix.
Data sourced via FEDIAF's National Association members and aligned by Soulor Consulting. For more information on our methodology, please read the Appendix.

A Pet Food Format Overview

IN EUROPE



58%

of pet food produced is for dogs



41%

of pet food produced is for cats

IN EUROPE



46%

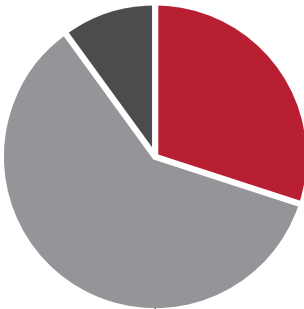
In value terms 46% comes from the dog sector



50%

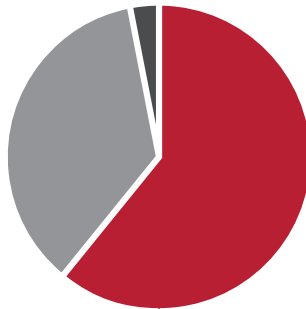
In value terms 50% comes from the cat sector

DOG FOOD
VOLUME
SPLITS



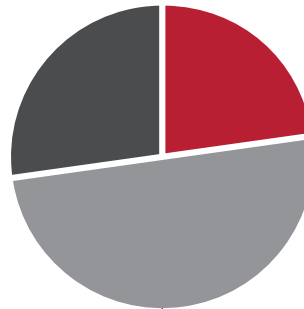
Wet Dog 30%
Dry Dog 60%
Treats Dog 10%

CAT FOOD
VOLUME
SPLITS



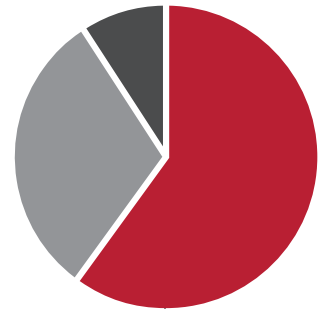
Wet Cat 61%
Dry Cat 36%
Treats Cat 3%

DOG FOOD
VALUE
SPLITS



Wet Dog 23%
Dry Dog 50%
Treats Dog 27%

CAT FOOD
VALUE
SPLITS



Wet Cat 60%
Dry Cat 31%
Treats Cat 9%





European Dog Population

| | |
|----------------------|-------------------|
| Albania | 90,000 |
| Austria | 836,000 |
| Belgium | 2,085,000 |
| Bosnia & Herzegovina | 184,000 |
| Bulgaria | 729,000 |
| Croatia | 778,000 |
| Cyprus | 179,000 |
| Czechia | 2,229,000 |
| Denmark | 618,000 |
| Estonia | 254,000 |
| Finland | 798,000 |
| France | 9,700,000 |
| Germany | 10,500,000 |
| Greece | 649,000 |
| Hungary | 2,773,000 |
| Iceland | 28,000 |
| Ireland | 563,000 |
| Italy | 9,000,000 |
| Kosovo | 48,000 |
| Latvia | 274,000 |
| Liechtenstein | 2,000 |
| Lithuania | 312,000 |
| Luxembourg | 47,000 |
| Malta | 100,000 |
| Montenegro | 42,000 |
| Netherlands | 1,667,000 |
| North Macedonia | 98,000 |
| Norway | 553,000 |
| Poland | 8,282,000 |
| Portugal | 3,071,000 |
| Rep. of Moldova | 170,000 |
| Romania | 4,258,000 |
| Serbia | 513,000 |
| Slovakia | 1,436,000 |
| Slovenia | 305,000 |
| Spain | 6,962,000 |
| Sweden | 1,155,000 |
| Switzerland | 515,000 |
| Türkiye | 1,466,000 |
| Ukraine | 4,536,000 |
| United Kingdom | 13,400,000 |
| TOTAL EUROPE | 91,205,000 |

European Cat Population



| | |
|----------------------|--------------------|
| Albania | 98,000 |
| Austria | 2,019,000 |
| Belgium | 3,128,000 |
| Bosnia & Herzegovina | 199,000 |
| Bulgaria | 793,000 |
| Croatia | 456,000 |
| Cyprus | 55,000 |
| Czechia | 1,395,000 |
| Denmark | 670,000 |
| Estonia | 313,000 |
| Finland | 1,003,000 |
| France | 16,700,000 |
| Germany | 15,900,000 |
| Greece | 601,000 |
| Hungary | 2,357,000 |
| Iceland | 40,000 |
| Ireland | 404,000 |
| Italy | 11,900,000 |
| Kosovo | 53,000 |
| Latvia | 417,000 |
| Liechtenstein | 9,000 |
| Lithuania | 163,000 |
| Luxembourg | 105,000 |
| Malta | 23,000 |
| Montenegro | 45,000 |
| Netherlands | 3,001,000 |
| North Macedonia | 106,000 |
| Norway | 787,000 |
| Poland | 7,463,000 |
| Portugal | 2,116,000 |
| Rep. of Moldova | 185,000 |
| Romania | 4,439,000 |
| Serbia | 558,000 |
| Slovakia | 535,000 |
| Slovenia | 471,000 |
| Spain | 4,939,000 |
| Sweden | 1,723,000 |
| Switzerland | 1,520,000 |
| Türkiye | 4,928,000 |
| Ukraine | 6,944,000 |
| United Kingdom | 12,300,000 |
| TOTAL EUROPE | 110,861,000 |

Data sourced via FEDIAF's National Association members and aligned by Soulor Consulting. For more information on our methodology, please read the Appendix.



European Ornamental Bird Population

| | |
|----------------------|-------------------|
| Albania | 5,000 |
| Austria | 128,000 |
| Belgium | 156,000 |
| Bosnia & Herzegovina | 11,000 |
| Bulgaria | 44,000 |
| Croatia | 27,000 |
| Cyprus | 88,000 |
| Czechia | 68,000 |
| Denmark | 211,000 |
| Estonia | 10,000 |
| Finland | 58,000 |
| France | 3,600,000 |
| Germany | 3,200,000 |
| Greece | 962,000 |
| Hungary | 411,000 |
| Iceland | 10,000 |
| Ireland | 105,000 |
| Italy | 12,700,000 |
| Kosovo | 3,000 |
| Latvia | 13,000 |
| Liechtenstein | 1,000 |
| Lithuania | 24,000 |
| Luxembourg | 26,000 |
| Malta | 116,000 |
| Montenegro | 2,000 |
| Netherlands | 1,562,000 |
| North Macedonia | 6,000 |
| Norway | 195,000 |
| Poland | 1,139,000 |
| Portugal | 756,000 |
| Rep. of Moldova | 10,000 |
| Romania | 297,000 |
| Serbia | 31,000 |
| Slovakia | 31,000 |
| Slovenia | 41,000 |
| Spain | 3,229,000 |
| Sweden | 317,000 |
| Switzerland | 108,000 |
| Türkiye | 11,939,000 |
| Ukraine | 714,000 |
| United Kingdom | 1,600,000 |
| TOTAL EUROPE | 43,954,000 |

Number of European Aquaria



| | |
|----------------------|-------------------|
| Albania | 8,000 |
| Austria | 252,000 |
| Belgium | 254,000 |
| Bosnia & Herzegovina | 17,000 |
| Bulgaria | 68,000 |
| Croatia | 36,000 |
| Cyprus | 8,000 |
| Czechia | 110,000 |
| Denmark | 292,000 |
| Estonia | 12,000 |
| Finland | 42,000 |
| France | 1,669,000 |
| Germany | 2,000,000 |
| Greece | 89,000 |
| Hungary | 85,000 |
| Iceland | 8,000 |
| Ireland | 31,000 |
| Italy | 1,400,000 |
| Kosovo | 5,000 |
| Latvia | 15,000 |
| Liechtenstein | 2,000 |
| Lithuania | 27,000 |
| Luxembourg | 16,000 |
| Malta | 13,000 |
| Montenegro | 4,000 |
| Netherlands | 720,000 |
| North Macedonia | 9,000 |
| Norway | 160,000 |
| Poland | 404,000 |
| Portugal | 98,000 |
| Rep. of Moldova | 16,000 |
| Romania | 152,000 |
| Serbia | 48,000 |
| Slovakia | 42,000 |
| Slovenia | 36,000 |
| Spain | 708,000 |
| Sweden | 267,000 |
| Switzerland | 217,000 |
| Türkiye | 899,000 |
| Ukraine | 410,000 |
| United Kingdom | 17,100,000 |
| TOTAL EUROPE | 27,749,000 |

Data sourced via FEDIAF's National Association members and aligned by Soulor Consulting. For more information on our methodology, please read the Appendix.



European Small Mammal Population

| | |
|----------------------|-------------------|
| Albania | 7,000 |
| Austria | 500,000 |
| Belgium | 313,000 |
| Bosnia & Herzegovina | 15,000 |
| Bulgaria | 58,000 |
| Croatia | 38,000 |
| Cyprus | 38,000 |
| Czechia | 187,000 |
| Denmark | 389,000 |
| Estonia | 28,000 |
| Finland | 164,000 |
| France | 4,700,000 |
| Germany | 4,300,000 |
| Greece | 412,000 |
| Hungary | 394,000 |
| Iceland | 10,000 |
| Ireland | 184,000 |
| Italy | 1,800,000 |
| Kosovo | 4,000 |
| Latvia | 34,000 |
| Liechtenstein | 2,000 |
| Lithuania | 64,000 |
| Luxembourg | 34,000 |
| Malta | 16,000 |
| Montenegro | 3,000 |
| Netherlands | 641,000 |
| North Macedonia | 8,000 |
| Norway | 200,000 |
| Poland | 1,289,000 |
| Portugal | 257,000 |
| Rep. of Moldova | 14,000 |
| Romania | 94,000 |
| Serbia | 41,000 |
| Slovakia | 44,000 |
| Slovenia | 88,000 |
| Spain | 548,000 |
| Sweden | 506,000 |
| Switzerland | 408,000 |
| Türkiye | 854,000 |
| Ukraine | 818,000 |
| United Kingdom | 3,000,000 |
| TOTAL EUROPE | 22,504,000 |

Number of European Terraria



| | |
|----------------------|------------------|
| Albania | 2,000 |
| Austria | 129,000 |
| Belgium | 52,000 |
| Bosnia & Herzegovina | 3,000 |
| Bulgaria | 14,000 |
| Croatia | 3,000 |
| Cyprus | 1,000 |
| Czechia | 5,000 |
| Denmark | 115,000 |
| Estonia | 1,000 |
| Finland | 30,000 |
| France | 2,100,000 |
| Germany | 1,100,000 |
| Greece | 6,000 |
| Hungary | 59,000 |
| Iceland | 6,000 |
| Ireland | 23,000 |
| Italy | 1,374,000 |
| Kosovo | 1,000 |
| Latvia | 1,000 |
| Liechtenstein | 2,000 |
| Lithuania | 2,000 |
| Luxembourg | 9,000 |
| Malta | 12,000 |
| Montenegro | 1,000 |
| Netherlands | 287,000 |
| North Macedonia | 2,000 |
| Norway | 110,000 |
| Poland | 219,000 |
| Portugal | 46,000 |
| Rep. of Moldova | 3,000 |
| Romania | 32,000 |
| Serbia | 10,000 |
| Slovakia | 4,000 |
| Slovenia | 4,000 |
| Spain | 740,000 |
| Sweden | 62,000 |
| Switzerland | 204,000 |
| Türkiye | 166,000 |
| Ukraine | 822,000 |
| United Kingdom | 2,122,000 |
| TOTAL EUROPE | 9,882,000 |

Data sourced via FEDIAF's National Association members and aligned by Soulor Consulting. For more information on our methodology, please read the Appendix.

European Population Total

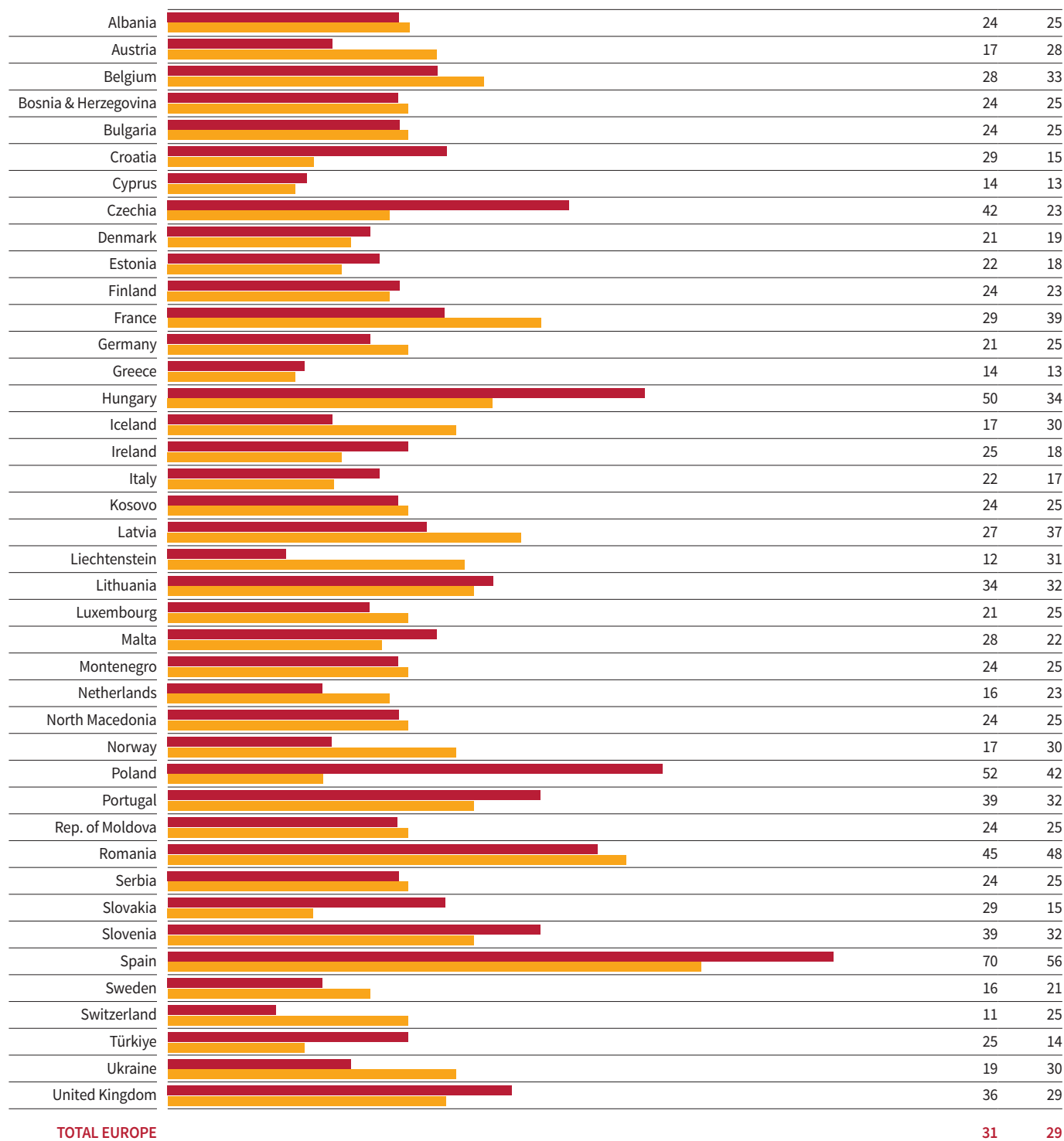
| | |
|----------------------|--------------------|
| Albania | 210,000 |
| Austria | 3,864,000 |
| Belgium | 5,988,000 |
| Bosnia & Herzegovina | 429,000 |
| Bulgaria | 1,706,000 |
| Croatia | 1,338,000 |
| Cyprus | 369,000 |
| Czechia | 3,994,000 |
| Denmark | 2,295,000 |
| Estonia | 617,000 |
| Finland | 2,095,000 |
| France | 38,469,000 |
| Germany | 37,000,000 |
| Greece | 2,719,000 |
| Hungary | 6,079,000 |
| Iceland | 102,000 |
| Ireland | 1,310,000 |
| Italy | 38,174,000 |
| Kosovo | 114,000 |
| Latvia | 753,000 |
| Liechtenstein | 18,000 |
| Lithuania | 592,000 |
| Luxembourg | 237,000 |
| Malta | 280,000 |
| Montenegro | 97,000 |
| Netherlands | 7,878,000 |
| North Macedonia | 229,000 |
| Norway | 2,005,000 |
| Poland | 18,796,000 |
| Portugal | 6,344,000 |
| Rep. of Moldova | 398,000 |
| Romania | 9,272,000 |
| Serbia | 1,201,000 |
| Slovakia | 2,092,000 |
| Slovenia | 945,000 |
| Spain | 17,126,000 |
| Sweden | 4,030,000 |
| Switzerland | 2,972,000 |
| Türkiye | 20,252,000 |
| Ukraine | 14,244,000 |
| United Kingdom | 49,522,000 |
| TOTAL EUROPE | 306,155,000 |

European Population Total Excluding Aquaria

| | |
|----------------------|--------------------|
| Albania | 202,000 |
| Austria | 3,612,000 |
| Belgium | 5,734,000 |
| Bosnia & Herzegovina | 412,000 |
| Bulgaria | 1,638,000 |
| Croatia | 1,302,000 |
| Cyprus | 361,000 |
| Czechia | 3,884,000 |
| Denmark | 2,003,000 |
| Estonia | 605,000 |
| Finland | 2,053,000 |
| France | 36,800,000 |
| Germany | 35,000,000 |
| Greece | 2,630,000 |
| Hungary | 5,994,000 |
| Iceland | 94,000 |
| Ireland | 1,279,000 |
| Italy | 36,774,000 |
| Kosovo | 109,000 |
| Latvia | 738,000 |
| Liechtenstein | 16,000 |
| Lithuania | 565,000 |
| Luxembourg | 221,000 |
| Malta | 267,000 |
| Montenegro | 93,000 |
| Netherlands | 7,158,000 |
| North Macedonia | 220,000 |
| Norway | 1,845,000 |
| Poland | 18,392,000 |
| Portugal | 6,246,000 |
| Rep. of Moldova | 382,000 |
| Romania | 9,120,000 |
| Serbia | 1,153,000 |
| Slovakia | 2,050,000 |
| Slovenia | 909,000 |
| Spain | 16,418,000 |
| Sweden | 3,763,000 |
| Switzerland | 2,755,000 |
| Türkiye | 19,353,000 |
| Ukraine | 13,834,000 |
| United Kingdom | 32,422,000 |
| TOTAL EUROPE | 278,406,000 |

Data sourced via FEDIAF's National Association members and aligned by Soulor Consulting. For more information on our methodology, please read the Appendix.

% of European Households Owning at Least One Dog or One Cat



Data sourced via FEDIAF's National Association members and aligned by Soulor Consulting. For more information on our methodology, please read the Appendix.

Appendix

FEDIAF Annual Population Data Methodology 2022 Onwards

This year national associations provided data for 2024 (some markets cannot provide the most recent year of data in time for FEDIAF's report therefore it was decided in 2023 that the report to be published in 2024 would harmonise data for 2022 and this lag continues for 2024 data published in 2026).

Most of our national associations provide FEDIAF with aquaria as they now understand that we collect aquaria not fish. As a result, FEDIAF has not had to 'translate' fish numbers into aquaria. Where markets have not provided any data, Soulor has based figures on what was published in 2023 and the number has been aligned according to the average number of pets per household.

This year the country list is the same as the last report. For countries where national associations provided data, this data was checked against 2023 to ensure consistency and in some cases 2023 data was published last year this data has been used again for 2024 (where NA have submitted). For countries that did not submit data, Soulor Consulting used 2023 populations and calculated these missing data using a new methodology. All final population data was rounded (growth rates are calculated using the unrounded data). One change this year is that the European Medicines Agency (EMA) has shared their 2024 population data for cats and dogs and where there were significant differences with FEDIAF published 2023 data the FEDIAF 2024 data has been adjusted to be inline with the EMA data. This process has also been done for those countries for 2023 data (CY, DK, FI, LT, LU, MT & SK) using the new 2024 data and applying the change in number of households 2024 vs. 2023.

The Total Europe & EU total households owning a pet percentages are calculated from those National Associations that submitted a number for households owning a pet (total) which were FR, DE, IT, NL, ES & GB. Those countries account for 59% of the total pet population (Total Europe, 64% for EU where GB was

removed from the calculation as no long in the EU). Those calculated percentages of households owning for those five/six countries was applied to the number of total households for Total Europe and EU.

FEDIAF ANNUAL MARKET DATA METHODOLOGY 2022 ONWARDS

As with Population data, this year national associations were asked to provide data for 2024. Where a national association was not able to provide volume or value sales for the market, this missing data was calculated based on expected price per kilo. Where a country did not submit, the total for total pet was estimated using a new methodology. Last year national associations were asked to provide more detail than in previous years to cover, cat and dog food, split into wet, dry and treats. For countries that are estimated the 2023-2024 growth is also based on rate of consumer inflation for 2022-2023. For 2024 (and restated 2023 data) EMA Populations data changes have been made to Market Data to ensure logical consistency.

LISTS OF COUNTRIES INCLUDED

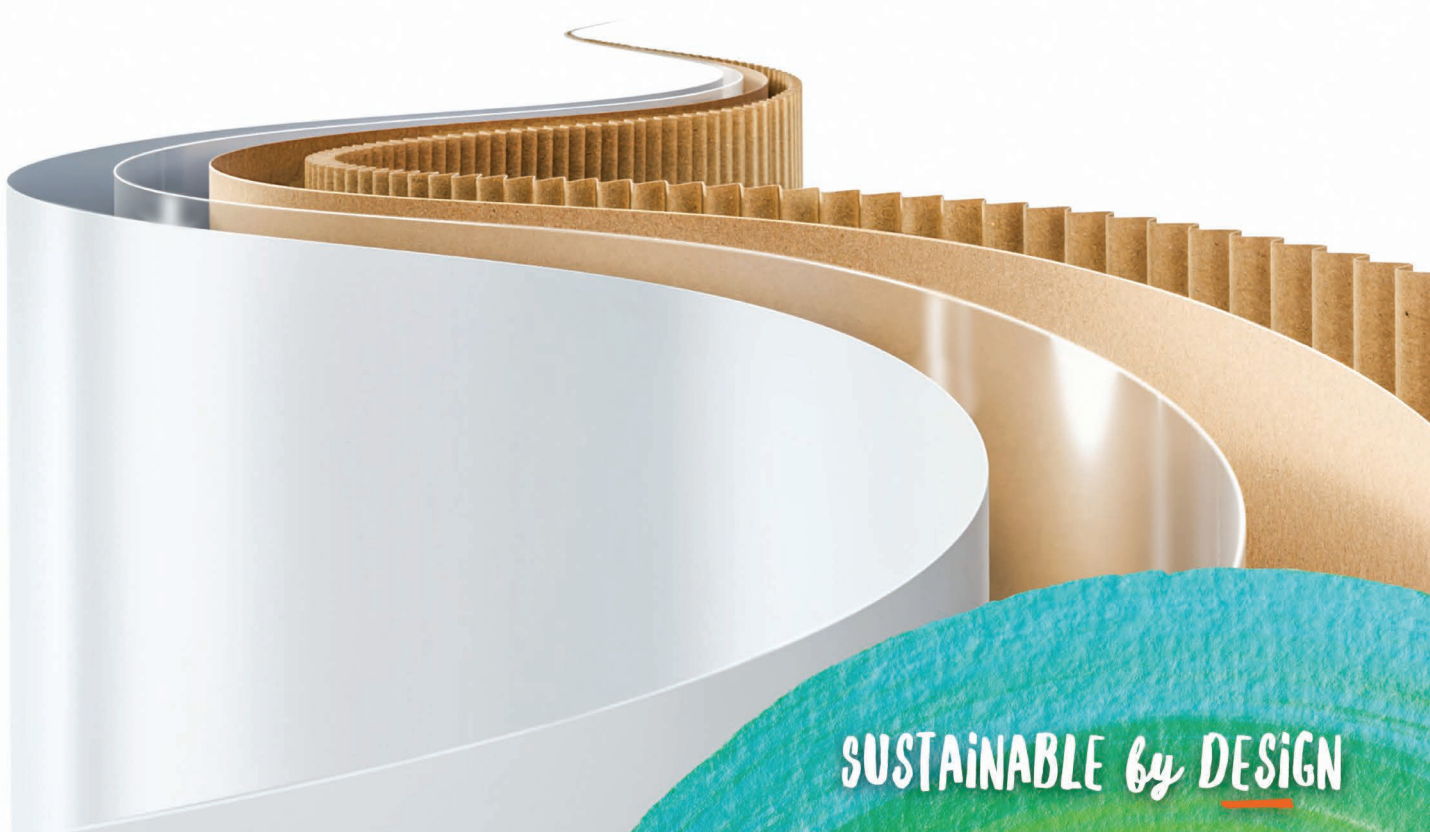
- Population & Market Data from NA data: AT, BE, CZ, FR, DE, HU, IT, NL, NO, PL, SK, ES, SE, CH, UK (some data points were changed by Soulor Consulting during checking process).
- 2026 notes: CH is 2025 data with a new methodology; FR methodology change & 2023 data restated; BE Dog Population 2024 revised after discussion with NA.
- Population & Market Data from FEDIAF/Soulor Consulting Estimates: AL, BA, BG, HR, CY, DK, EE, FI, GR, IS, IE, XK, LV, LI, LT, LU, MT, ME, MK, PT, MO, RO, RS, SI, TR, UA.
- Sales split Cat/Dog table: Limited to: AT, CZ, FR, DE, IT, NL, NO, SK, ES, SE & GB (91% of total volume submitted).

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