



ASSALCO
Associazione Nazionale Imprese
per l'Alimentazione e la Cura
degli Animali da Compagnia



an event by



2007

Animals recognised
as sentient beings

2022

Animal protection
included in the
Italian
Constitution

15th Edition 2022 ASSALCO ZOOMARK REPORT

Pet Food and Pet Care
**Pets in Italy: 15 Years of
Changes in the Family
and Society**

SUMMARY

With contributions from



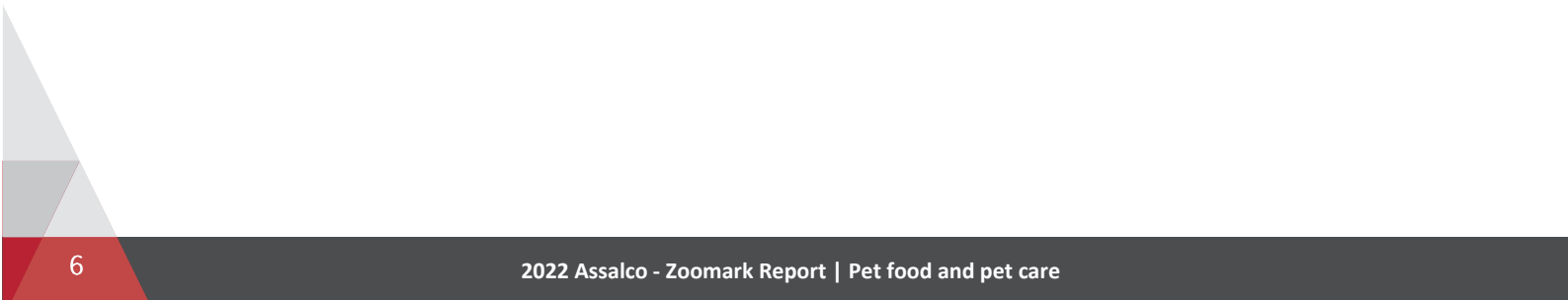


Contents

MARKET AREA.....	5
PET INFOGRAPHICS: POPULATION AND MARKET.....	7
FOOD FOR DOGS AND CATS.....	9
Size, development trends and key features of the sales channels - Groceries - Traditional Petshops - Petshop chains and the emerging channels.....	9
DOG AND CAT FOOD IN GROCERY STORES, TRADITIONAL PETSHOPS AND PET RETAIL CHAINS.....	10
THE MARKET FOR PET PRODUCTS: SIZE AND TRENDS OF THE MAIN CATEGORIES.....	13
SOCIAL AREA.....	16
SOCIAL AREA INFOGRAPHIC.....	18
THE PET POPULATION IN ITALY AND THE REST OF EUROPE.....	20
HOW PEOPLE'S RELATIONSHIP WITH THEIR PETS HAS CHANGED IN THE LAST 15 YEARS IN ITALY.....	22
Introduction.....	22
Methodology.....	22
Pets and their owners in Italy.....	22
How the Italians see it: the changes in people's relationship with their pets.....	23
How the Italians see it: how the role of pets in society has changed.....	23
Pet owners: how they view the developments in their relationship with their pets.....	24
Pet owners: how they view the developments in pet food.....	24
Non-owners: the idea of getting a pet.....	24
PETS: FIFTEEN YEARS OF POLITICS AS SEEN FROM THE PERSPECTIVE OF THE PARLIAMENTARY INTERGROUP.....	25
HEALTH AREA.....	28
THE CHANGES IN VETERINARY MEDICINE IN ITALY: INNOVATION AND TRADITION.....	30
Pets now protected by the Italian Constitution.....	30
The trusted expert: a key figure for pet owners.....	30
The work of vets during the pandemic.....	30
The new role of pets in families.....	31
Pet food: a resource for pet owners.....	31



MARKET AREA



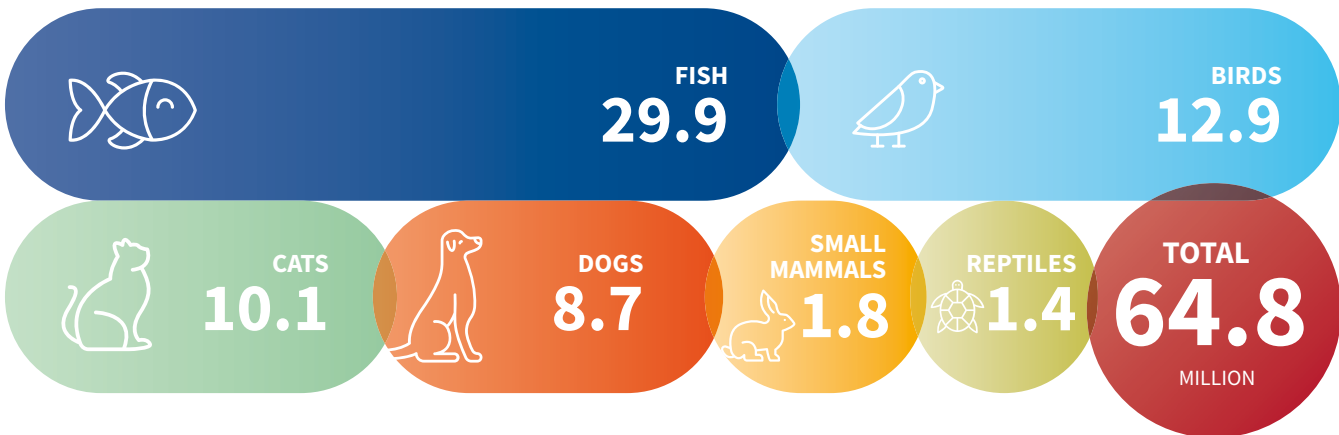
THE 2022 ASSALCO-ZOOMARK REPORT PETS: POPULATION AND MARKET

THE PET POPULATION IN ITALY IN 2021

SOURCE: EUROMONITOR



IN MILLIONS



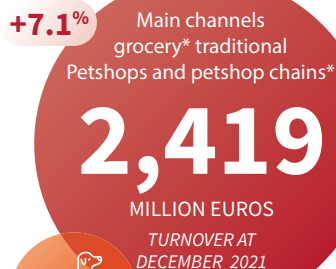
THE ITALIAN MARKET IN 2021

SOURCE: IRI

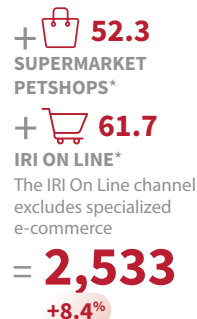


PET FOOD

DOG AND CAT FOOD

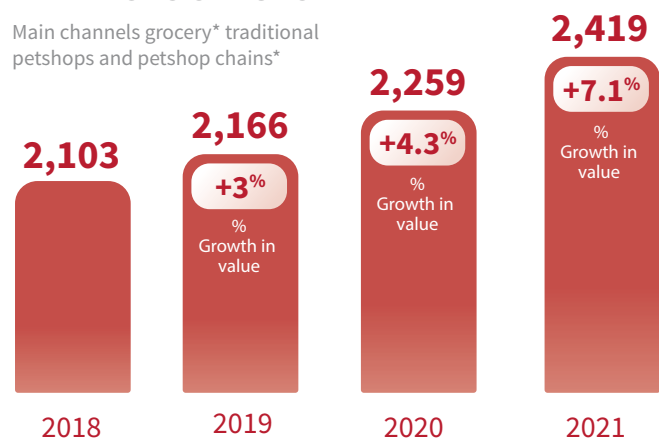


Emerging channels
in million euros

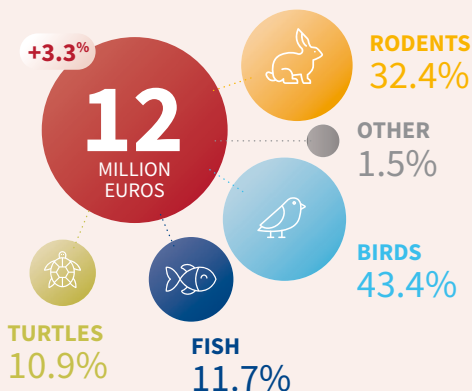


TOTAL DOG AND CAT FOOD MARKET IN MILLIONS OF EURO

Main channels grocery* traditional
petshops and petshop chains*

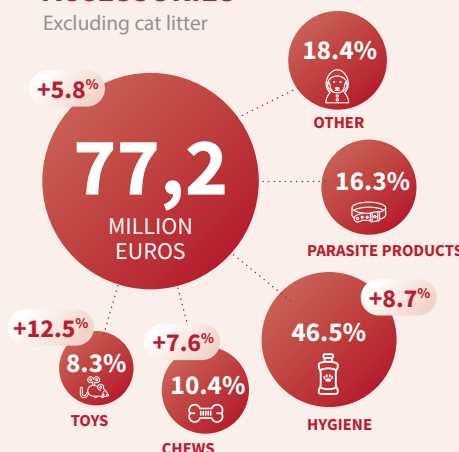


FOOD FOR SMALL ANIMALS



ACCESSORIES

Excluding cat litter



CAT LITTER



TURNOVER IN LARGE SCALE RETAIL

Notes on the infographic Pets: population and markets

Grocery: Large scale retail + Discount and traditional retail. IRI Panel Petshop Chains: L'isola dei Tesori, MaxiZoo, CroceAzzurra, Italpet, ZooMegastore,

Agrizoo2, Arcaplanet, Fauna Food and Zoomarket are excluded from IRI data.

Large scale retail Petshops: specialized stores belonging to large scale retail outlets. Leader panel of 86 Amici di Casa points of sale

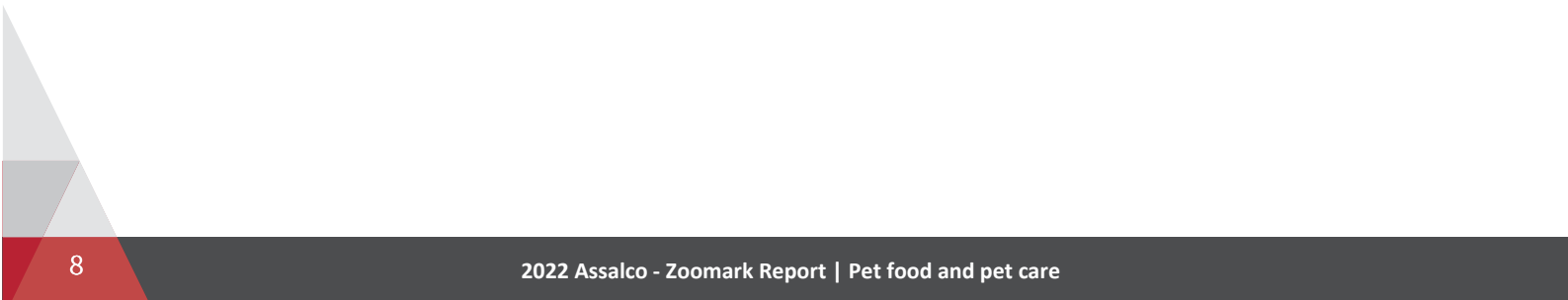
Coop, Petstore Conad, Animali Che Passione, Joe Zampetti, Pet Elite (Selex) and Ayoka (Vegè Multicedi). [source IRI]. E-commerce: source IRI On Line. The IRI On Line channel excludes specialized e-commerce.



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CAT AND DOG FOOD

Size, development trends and key features of the sales channels - Groceries - Traditional Petshops - Petshop chains and the emerging channels

In the year ending 26 December 2021, the Italian market for **cat and dog food** - in Groceries, Traditional Petshops and Petshop chains - had a **turnover of 2,419.4 million euros**, and sold a total of **658,467 tons of product**. Starting in 2020, the first year of the Covid-19 pandemic, the market showed rapid growth, building on an existing trend and **boosting total turnover by +7.1%** and **volume by +5%**.

Positive trend for dog and cat food: +7.1% in value and +5% in volume

Considering the emerging channels too, namely supermarket petshops¹ and the online channel (monitored by IRI)², the market for dog and cat food in Italy had a turnover of 2,533.4 million euros (+8.4%) and sold a total of 682,191 tons (+5.9%).

These figures show that the market for dog and cat food continues to grow faster than that of Consumer Packaged Goods, which in 2021 rose by +3.1%.³

During the period under analysis, the pet food market saw higher growth in value than volume, which is accounted for by consumers opting for more expensive products - premium, high quality products, smaller formats with a higher price/weight ratio, foods designed for specific health conditions in specialised stores and products that exploit emerging trends (e.g. natural, vegetarian/vegan, gluten-free, grain free, single protein, formulated with selected raw materials, etc ...).

As detailed in the previous Assalco - Zoomark Report (14th edition), the faster growth of the market over the last two years has been partly due to a **significant increase in ownership of dogs and cats** in Italian households, a trend which began at the end of the first lockdown, when many Italians decided to get a pet: the stress of the lockdowns led to many people wanting to take on a pet, in view of the well-known benefits of pet ownership.

The **increase** in pet ownership was reflected by a substantial increase in the number of **households⁴ purchasing dog and cat food**, which has now reached **12.2 million**: about **1 million more** than the previous year, and mostly younger people of medium-high socio-economic status, an interesting profile in terms of their spending power and tendency to go for higher quality products. As a result of this increase, the number of **households purchasing dog and cat food reached 46.9%** of the total number of Italian households (+3.4 points compared to last year).

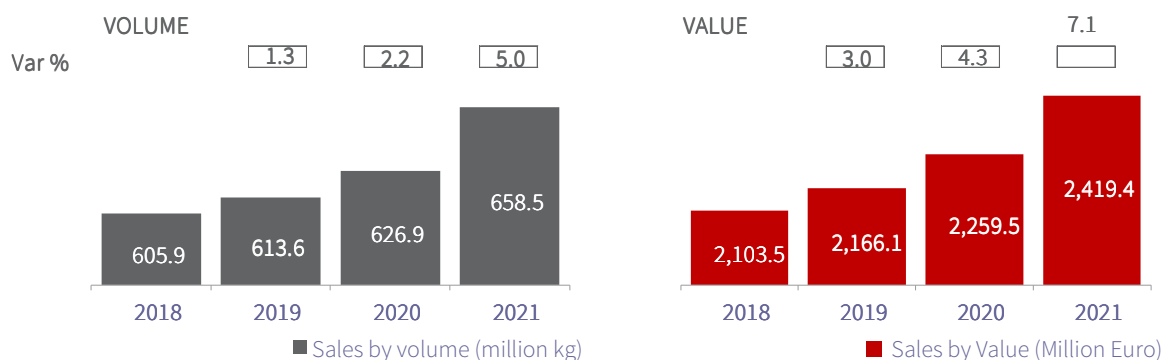
¹Large-scale retail Petshops: points of sale dedicated to the sale of pet food and accessories, belonging to companies in large-scale retail. The data contained in the report regards a leading panel of 86 points of sale - Amici di Casa Coop, Petstore Conad, Animali Che Passione, Joe Zampetti, Pet Elite (Selex) and Ayoka (Vegè Multicedi).

²Source IRI On Line The IRI On Line channel excludes specialised e-commerce.

³Hypermarkets, Supermarkets, Small self-service stores, Household and Personal Care shops, Discount supermarkets and online generalist retailers

⁴Source of data GfK - Consumer Panel: updated to year ending April 2021

DOG AND CAT FOOD IN GROCERY STORES, TRADITIONAL PETSHOPS AND PET RETAIL CHAINS



2022 Assalco – Zoomark Report: Source: IRI - 52 weeks to 26 December 2021

The positive trend in value continues: +7.1%

The main distribution platforms also showed a positive trend, with faster growth than 2020, and sales volume also grew at more than twice the rate of previous years.

The various distribution platforms - Groceries, Traditional Petshops and Petshop Chains - show different trends and results for the total market and its main segments.

Dog and cat food in Grocery stores, Traditional Petshops and Pet Retail Chains

Tot Pet food	Grocery			Traditional Petshops			Petshop Chains			Tot
	AT Dec 20	AT Dec 21	Var %	AT Dec 20	AT Dec 21	Var %	AT Dec 20	AT Dec 21	Var %	Var %
Sales by Vol (million kg)	489.4	515.0	5.2	94.1	93.9	-0.2	43.3	49.6	14.4	5.0
Sales Val (million €)	1,323.3	1,425.7	7.7	653.7	656.2	0.4	282.5	337.5	19.5	7.1

Zoomark Report 2022: Source: IRI - 52 weeks to 26 December 2021

The **Grocery** channel accounts for 58.9% of the total turnover of the pet food market (i.e. 1,425.7 million euros) and 78.2% of the volume (514,957 tons). The year ending December 2021 saw an increase in turnover of +7.7% and volume of +5.2%.

The Grocery category totals data from the channels: Hypermarkets, Supermarkets, small self-service shops, Traditional (including Micromarkets, stores less than 100 sqm) and Discount stores.

Supermarkets (9,127⁵ points of sale), which account for 29.7% of turnover and 31.9% of volume, saw an increase in value of 6.5% and volume of 2.7%. In the year ending December 2021, the **superstores**⁶ (7.9% of turnover) confirmed their growth with an increase in value of +8.1% and in volume of +3.2%.

⁵IRI universes update as of 30/6/2021

⁶Superstore: self-service store with a sales floor of at least 2,500 square metres and presence of packaged consumer goods

Hypermarkets⁷, which account for 7.2% of volume and 6.9% of turnover of total Dog and Cat Food, saw a growth in value of +4.9%, while volumes remained stable; **small self-service stores** (100-399 sqm), which represent 5.1% of turnover and 5.6% of volume, saw a drop in sales (-0.8% in value and -3.9% in volume): in the period in question, compared with the exceptional sales of the first lockdown, when due to the restrictions on mobility, Italians rediscovered the benefits of proximity (local locations, speed and service).

Double-digit growth for the discount channel

Among the Grocery channels, particular attention should be devoted to the **discount** channel, which starting from the second half of 2020 saw a boost in growth across all markets. In the dog and cat food market, the discount channel - which represents 28.6% of volume and 12.8% of turnover - saw double-digit growth in the period under analysis: +17.4% turnover and +12.6% in volume.

Petshop chains (7.5% of volume and 13.9% of value, translating to a total of 49.6 tons and 337.5 million euros) continued to grow, up 19.5% in value and 14.4% in volume compared to the previous year.

Petshop Chains are stores specialized in selling food and products for pets (over 750 stores, 413 of which are represented in the IRI report⁸) with at least 7 stores: L'Isola dei Tesori, Maxi Zoo, Croce Azzurra, Italpet, Zoo Megastore, Agrizoo2, Arcaplanet, Fauna Food and Zoomarket.

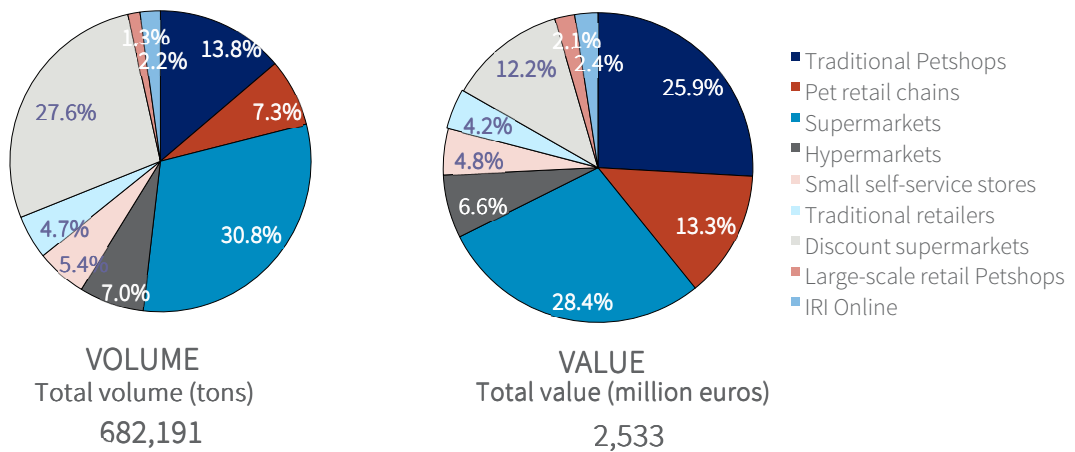
It should be noted that the last three brands are excluded from the IRI survey which therefore represents 413 points of sale.⁹

Traditional Petshops (4,857 stores¹⁰) represent the main non-grocery channel distributing pet products in Italy. They represent only 14.3% of volume (corresponding to approximately 93,947 tons), but they generate 27.1% of value (656.2 million euros).

Last year the channel saw a growth of 0.4% in turnover, with a slight dip in volume (-0.2%).

Despite strong competition from the chains, which are continuing to grow steadily, the advent of new distribution formats (supermarket pet stores and e-commerce monitored by IRI), traditional petshops represent innovation and service, with key a focus on their core business, and these factors have enabled them to preserve their identity and turnover.

Channels by volume and value



2022 Assalco - Zoomark Report: Source IRI - 52 weeks to 26 December 2021

⁷Hypermarkets: self-service stores with a sales floor of at least 2,500 square metres and presence of packaged consumer goods, and ongoing assortment of white goods and clothing.

⁸Latest available data: August 2020.

⁹Latest available data: August 2020.

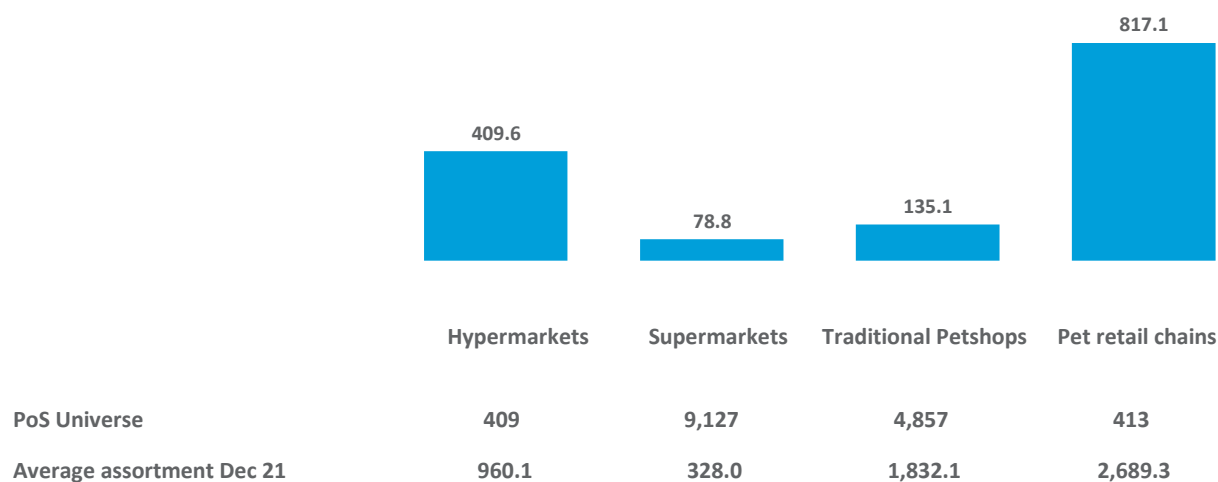
¹⁰Latest available data: 2019.

Traditional Petshops are confirming their high profitability, together with specialized chains. These petshops, with just over half of the number of outlets of supermarkets (4,857 compared to 9,127) on average invoice about double per store: 135,098 euros/year compared to 78,817 euros/year for supermarkets.

Chains, which boast the widest, deepest product assortments, have an average turnover per store that is on average six times that of a Traditional Petshop.

This confirms a substantial difference in the characteristics, profitability and target market for the products sold by the three channels, and in particular between Traditional Petshops and Chains.

Average annual sales per store



2022 Assalco - Zoomark Report 2022: Source: IRI - 52 weeks to 26 December 2021

THE MARKET FOR PET PRODUCTS: SIZE AND TRENDS IN THE MAIN CATEGORIES¹¹

In the year ending 26 December 2021 in the overall market monitored by IRI (Traditional Grocery +Petshop +Petshop Chains), all the main segments of dog and cat food showed positive trends in terms of value compared to the previous year.

	Sales Value (million euros)	% Share of Value	Var %
Wet cat food	807.7	33.4	8.4
Dry Cat food	425.0	17.6	5.6
Wet Dog Food	364.2	15.1	5.3
Dry Dog food	568.6	23.5	4.8
Snacks&Treats (Dog +Cat)	253.7	10.5	13.4
Tot. Dog and Cat Foods	2,419.4	100.0	7.1
Food for other animals	12.5		3.3
Pet accessories	77.2		5.8
Cat Litter	79.8		5.0

2022 Assalco - Zoomark Report 2022: Source: IRI - 52 weeks to 26 December 2021

Wet food remains the **leading segment**, with a turnover of 1,172 million euros that equates to a market share of 48.4%.

In the year ending December 2021 there was an **increase** in the sale of **wet food**, with turnover up +7.4%.

The growth of wet foods was mainly driven by the Grocery channel which generated 68.3% of turnover overall (wet cat food 69% and wet dog food 66.7%).

Within the wet food category, the main segment, wet cat food (33.4% of the value of dog and cat food) rose in turnover by 8.3% in Grocery (+5.8% in volume) and by +2.5% in Traditional Petshops (+2.3% in volume) while wet dog food (15.1% of the total turnover) grew by 5.8% (+4.3% in volume) in Grocery and fell by -1.9% (-4.6% in volume) in Traditional Petshops. In the Petshop chains both segments grew: wet cat food was up +21.8% in value and +17.1% in volume; wet dog food rose by +17.4% in value and +12.1% in volume.

Wet foods proved to be the category worth the most out of the total market

The **dry food segment** is worth 995 million euros and accounts for 41.1% of the market: 23.5% of dry dog food and 17.6% of dry cat food.

For this segment, beyond the still **very dynamic performance** of the **Chains** (dry dog food +17.6% in value and +13.4% in volume; dry cat food +20.6% in value and +15.8% in volume), in the year ending December 2021, **Grocery** saw **dry cat food up** by +6.4% (+5.4% in volume) and **dry dog food up** by +4.5% (+4.3% in volume); in **Traditional Petshops** we find the following scenario: while **dry cat food fell** by 2.5% in value

¹¹Data regarding food for other animals, cat litter products and accessories regard the large-scale retail sector (hypermarkets, supermarkets and independent retailers up to 100 sqm).

(-3.4% in volume), **dry dog food rose slightly**, by 0.6% in value and +0.7% in volume.

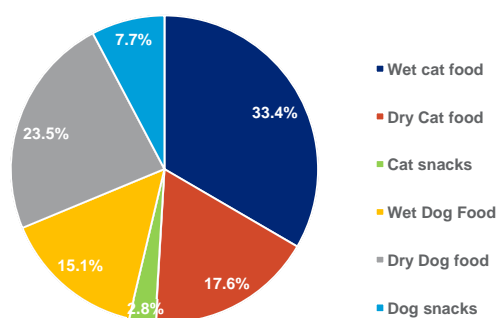
In terms of channels, unlike wet food, which saw dog and cat food in alignment in the Grocery channel, dry dog food saw most of its sales in Traditional Petshops (47.7%) while dry cat food was strongest in the Grocery channel (60.3%)

Snacks continue to be a very dynamic segment: +13.4% in value

Functional **snacks** and treats (snacks with functional objectives, for example oral hygiene, or treats designed to be appetizing, usually administered as a reward or more simply to keep the animal busy, e.g. chews), continued to show positive dynamics (+13.4% in value).

Double-digit growth was reported in both Grocery and Chains: in the Chains cat snacks grew by 20.4% and dog snacks by 19.7%, while in Grocery, dog snacks were up 10.4% and cat snacks 26.3%. In Traditional Petshops, dog snacks rose by +2.6% while cat snacks grew by +8.6%.

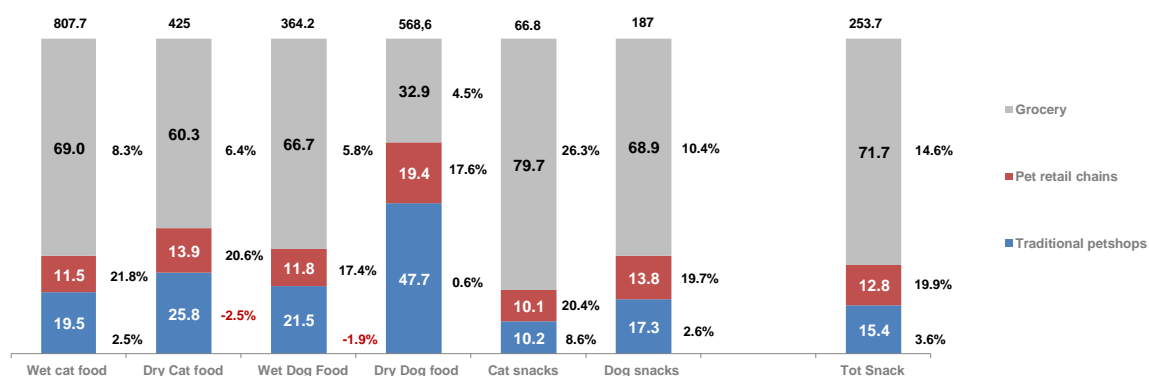
Breakdown of the market for dog and cat food



Share of Value		
Cat	Food	Products
		53.7%
Dog	Food	Products
		46.3%

2022 Assalco - Zoomark Report: Source IRI - 52 weeks to 26 December 2021 - data on value

Pet food shares and trends by channel (dog and cat)



2022 Assalco - Zoomark Report: Source IRI - 52 weeks to 26 December 2021 - data on value

As for the other categories covered (food for other animals, animal accessories and litter), when it comes to large-scale retail¹² alone, **food for other animals** grew by +3.3% in value.

In large-scale retail, the **accessories** market (hygiene products, parasite treatments, toys, leashes, beds,

¹² Hypermarkets, supermarkets and small self service stores (100-399 sqm)

bowls, cages, aviaries, aquariums, turtle tanks and various tools) also saw an increase of +5.8% compared to last year.

The **positive trend** in **cat litter** of the last few years continued: in the year ending December 2021 in the large-scale retail channel it grew in turnover by +5%.

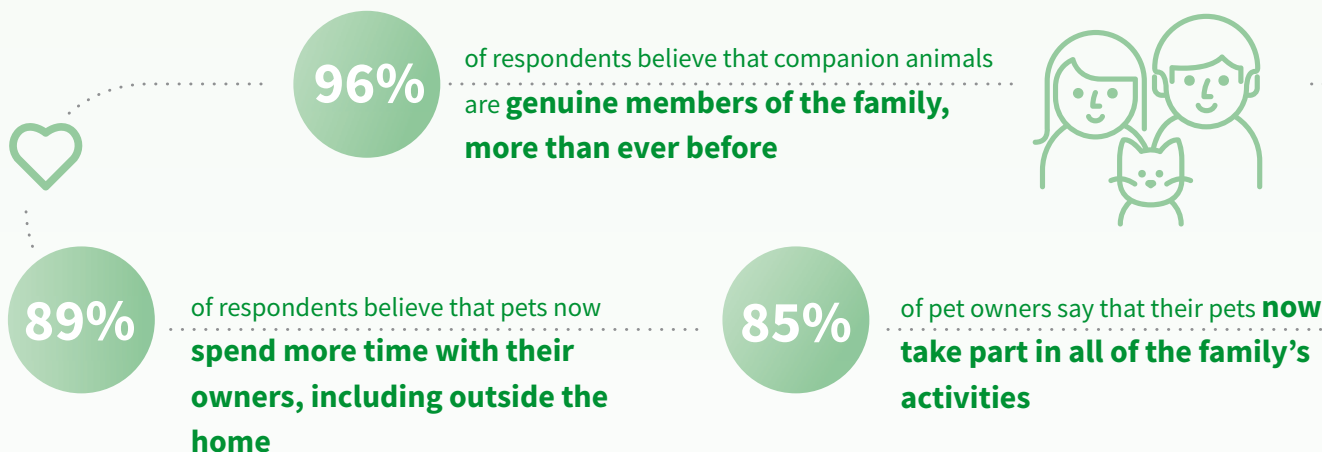
SOCIAL AREA

THE 2022 ASSALCO - ZOOMARK REPORT

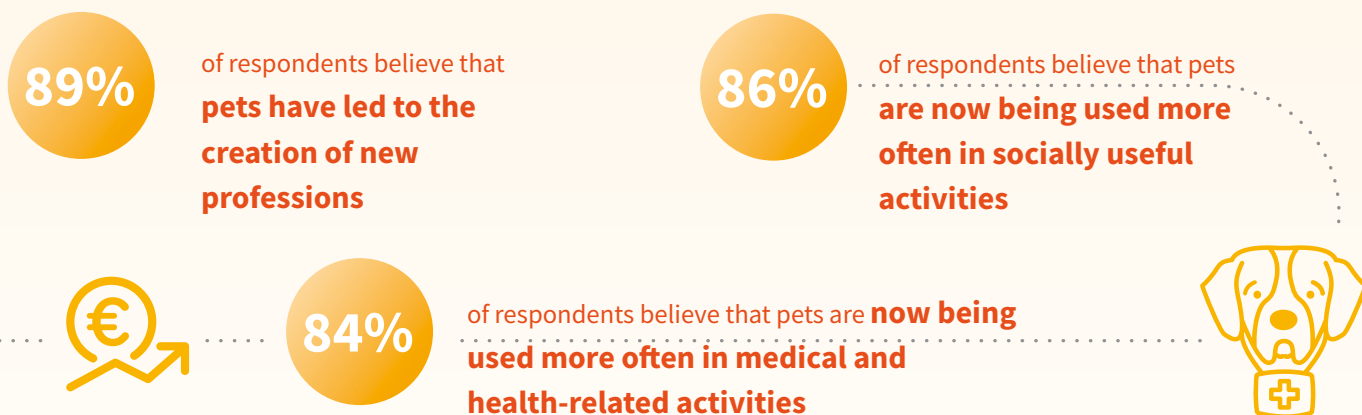
ITALIANS AND PETS: HOW THE RELATIONSHIP HAS CHANGED IN THE LAST 15 YEARS

IN THE LAST 15 YEARS PETS HAVE INCREASINGLY BECOME:

→ GENUINE MEMBERS OF THE FAMILY



→ USEFUL IN SOCIETY



→ TAKEN INTO CONSIDERATION BY THE INSTITUTIONS



Source: Doxa Survey "Companion animals: how has their role in the family and society changed in the last 15 years?"



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THE PET POPULATION IN ITALY AND THE REST OF EUROPE

In 2021, continuing the trend sparked by the Covid-19 pandemic, various sources reported an increase in the number of pets in Italian households for the second year running. Euromonitor has estimated the total to be around **64.769 million animals**.

More than 64 million
pets in Italy in 2021

The most common pets in Italy are **fish**: there are more than **29.9 million fish** kept as pets in Italy, about half the total number of pets in the country. **Dogs and cats total over 19 million, and both are on the rise.**

Euromonitor has also calculated **12.88 million birds**, while **small mammals** and **reptiles** are estimated at **1.8 and 1.36 million**, respectively.

	Estimates - 2021 (million)
Dogs	8.729
Cats	10.077
Fish	29.9
Ornamental birds	12.88
Small mammals	1.819
Reptiles	1.364
Total Pet Population	64.769

2022 Assalco - Zoomark Report: Source Euromonitor

If we compare Euromonitor data for 2007 on the pet population in Italy with the figures shown above, we can see a significant increase in ownership of cats and dogs, and a stable situation for other pets: the number of birds, small mammals and reptiles has decreased slightly, while fish are slightly on the up.

A surge in cat and
dog ownership in the
last 15 years

In more detail, over the last 15 years the number of dogs in Italian households has risen by 1.764 million. But the gold medal goes to cats, from 7.39 to over 10 million: a rise of 2.687 million. Birds, small mammals and reptiles have decreased slightly, with 75,000, 11,000 and 24,000 units respectively. Fish alone have seen a slight increase, of 58,000.

Looking at **Europe** as a whole, Fediaf, the European Pet Food Federation, estimates¹³ that the continent's households own **more than 310 million pets, considering dogs, cats, birds, small mammals, reptiles and number of aquariums.**

More than 310 million
pets in Europe

Considering the European Union alone, the number of pets exceeds 230 million.

Cats are most popular pet (113 million), followed by dogs (almost 93 million), ornamental birds (48 million), small mammals (just under 30 million), fish, with over 16 million aquariums, and 11 million

¹³ Fediaf - Facts&Figures 2021

reptiles. This ranking also applies to the European Union, with a smaller gap between cats and dogs.

	Estimates - 2021 (million)	
	Europe	European Union
Dogs	92.948	72.709
Cats	113.588	83.622
Aquariums	16.404	10.700
Ornamental birds	48.720	33.950
Small mammals	29.348	21.544
Reptiles	11.437	9.811
Total Pet Population	312.445	232.336

2022 Assalco - Zoomark Report - Source: Fediaf

HOW PEOPLE'S RELATIONSHIP WITH THEIR PETS HAS CHANGED IN THE LAST 15 YEARS

Introduction

In the last 15 years, the relationship between people and pets has changed. To get a better idea of the scenario and the nuances involved, BVA-Doxa was appointed to do a study, which also set out to investigate the benefits that living with pets can bring to people's lives and society in general.

The Doxa survey
of the Italian
population

Methodology

To gather direct experiences of the changing relationship between humans and pets in the last 15 years, and how this is viewed by the Italian population, the survey was conducted on a representative sample of the adult Italian population¹⁴ between the ages of 35 and 74.

To ensure a representative sample, the interviews were distributed according to variables of gender, age, geographical area and level of education, as shown in the graph below:

Pets and their owners in Italy

Among respondents, 42% turned out to own one or more pets.

In detail, 28% of respondents possessed one or more dogs, while cat ownership regarded 22% of respondents.

No significant differences between age groups and geographical areas were detected.

One highly discriminating variable turned out to be the presence of children / young people (aged 0-14) in the household: in families with children, the presence of both dogs and cats is 11 percentage points higher than in families without children. Families with children also had a greater number of other types of pets (the only exception being birds).

Children and pets: a winning combination

Analysing and cross-referencing the data, it emerges that terrarium animals and small mammals are more widespread among younger respondents, i.e. those belonging to the 35 – 49 age group. When it comes to geographical area, compared to the average there appear to be more bird owners in Southern Italy, while terrarium animals are more widespread in the North East and Centre regions.

The average number of dogs owned is 1.2, while the figure for cats is 1.6.

¹⁴ Data was gathered from online interviews to a sample of 1,000 individuals aged 35-74 selected from a BVA-Doxa proprietary panel. The survey was conducted in the period between 4 and 10 April 2022.

How the Italians see it: the changes in people's relationship with their pets

In general, Italians aged 35-74, whether pet owners or not, have perceived the changes in the relationship between owners and pets over the last 15 years.

The Italians' point of view: how has the relationship between humans and pets changed?

Many of the statements on these changes that were presented during the interviews met with widespread agreement, with those who replied "agree" or "strongly agree" adding up to 90%. In particular, people were highly aware that pets are increasingly seen as members of the family, and that there are more pets in Italian families and a growing level of attention to pets, both in general and in reference to care and nutrition.

89% of respondents also believed that, compared to 15 years ago, pets now spend more time with their owners outside the home too, with more and more pet-friendly places.

And, when respondents were asked if they thought pet owners devoted too much attention to their animals, less than half of the sample interviewed believed that this attention was "excessive".

Coming to what respondents believed were the reasons for owning a pet, various, similar aspects emerged: from the company provided by pets, to the elderly in particular, to their role in making children and adolescents more responsible. It is worth noting how many replied that "the family is more complete with a pet". And on the contrary, fewer than 1 in 10 Italians believe that people took on a pet to follow the example of celebrities and influencers: the view is that people choose to have a pet because they are aware of the benefits and know how pet ownership enriches family life, not because they want to follow fashion.

The Italian viewpoint: how the role of pets in society has changed

When it comes to the changing role of pets in society, the respondents were well aware of the major changes that have taken place over the last 15 years, on many aspects: new professions have been created, there are more safeguards for pets, both locally and nationally, and animals are increasingly being used for activities that are both socially useful as well as for medical and health-related purposes.

The Italian perspective: pets in society

Though pets make such a great contribution to society, according to 77% of respondents, they are still not sufficiently protected – although there is more consideration of them in the law than 15 years ago.

But legislation is not the only area where more has to be done - pet owners need to do more too, though 59% of respondents viewed them as more attentive and responsible than 15 years ago.

These findings apply across public opinion: indeed the perception of pets in society is not conditioned by whether respondents owned pets or not.

Respondents were also given the opportunity to express negative opinions about the increasing presence of pets in cities - but when the data pertaining to statements that could have evidenced a negative view of this trend was analysed, it was noted that the number of "pet rejectors" remains low: only 14% (strongly agree) +26% (agree) of the total sample believed there were too many public places accessible to pets, and only 10% + 22% believe there is an excess of media attention to pets.

Pet owners: how they view the developments in their relationship with their pets

Pet owners could only confirm the changes that have taken place over the last 15 years in terms of the growing attention to and consideration for pets, their care, health and well-being.

The main indicators of this include: pets increasing being part of all areas of family life, the increased time dedicated to pets (for play, cuddles, etc.) and the increasingly frequent, specific purchases of hygiene and cleaning products.

The perspective of pet owners: how has their relationship with their pets changed?

Confirming that pets are *bona fide* members of the family, as compared to 15 years ago, 85% of owners reported that pets are involved in all of the family's activities.

This percentage applies not only to dog owners, as might be imagined, but also to owners of cats and other pets.

Pet owners are more aware of their pets' needs and spend more time caring for them, and choosing pet care products such as hygiene products or toys. 69% of owners also buy necessary products in the form of a gift, but only a small percentage of owners believe that this is "excessive". Indeed only 11% agreed strongly with the statement "Compared to a few years ago, today we make more use of luxury services for our pet (e.g. spas)".

Pet owners: how they view the developments in pet food

When it comes to feeding their pets, pet owners have a clear perception of the changes that have taken place in the last 15 years, acknowledging the advances made by companies, above all in terms of innovation and the practicality of industrially produced food products.

Pet nutrition in Italy: how it has developed over the last 15 years

90% of respondents believe that more research and innovation is being carried out by pet food companies. A similar percentage, 89%, consider processed foods more practical than they did 15 years ago.

The way we feed our pets has changed compared to the past also due to a greater awareness of our pets' nutritional needs – we now know that homemade concoctions can prove harmful. Devoting attention to nutrition is also seen as a way of showing affection to our pets.

Non-owners: the idea of getting a pet

The survey also explored the willingness to embark on pet ownership among respondents currently without a pet. Almost half of the sample (48%) stated that they intended to get a pet in the future.

The most significant data undoubtedly regards those planning to take on a pet by the end of the year (7%) or in the next 2-3 years, also 7%, for a total of 14%.

Non-owners or future owners?

The share of the sample not intending to get a pet (52%) attributed this decision to lack of space and time and the fact of not being at home for long periods. The main thing stopping people from getting pets is therefore the awareness of not being able to guarantee quality time together and ensure the animal's

well-being. In third place among the reasons for not wanting a pet is not having someone they can rely on to take care of the pet if necessary.

PETS: FIFTEEN YEARS OF POLITICS AS SEEN FROM THE PERSPECTIVE OF THE PARLIAMENTARY GROUP

If we consider all aspects of the relationship between people and pets, it cannot be denied that many things have changed in the last fifteen years. This applies to society, culture, and the awareness of the institutions, and therefore also our country's legal system. An issue long viewed as "marginal" in politics has become increasingly important, for the simple reason that it has become more significant in the everyday lives of Italians and consequently also in public opinion.

From pets being formally recognised as sentient beings...

It is no coincidence that a key review of legislation began after the approval of the **Lisbon Treaty** on the Functioning of the European Union (TFEU) of 2007, ratified by Italy with Law 130 of 2008 and in force since 1 December 2009. Despite the exemptions which limit its effectiveness, the heart of Article 13 of the TFEU ("The Union and the Member States shall, since animals are sentient beings, pay full regard to the welfare requirements of animals") enshrines **a new conception of animals as subjects meriting protection** in themselves, a notion considered on a par with traditional constitutional principles such as openness (art. 15), the protection of personal data (art. 16), and respect for religious associations and communities (art. 17). A clear affirmation of animal subjectivity, after centuries of philosophical debate on the subject, from Descartes's denial to contemporary supporters of the notion (Singer, Regan).

In this context, the Parliament of the XVI legislature reviewed the legislation on the abandonment, mistreatment and killing of animals amended in 2004 with Law 189, which made **mistreatment a crime** and introduced Title IX b of the penal code "Crimes against the sentiment for animals" (and not "against animals": note the anthropocentric approach that has remained in force to this day), including examples such as killing out of cruelty and not necessity, or the organization of animal fights. The opportunity to clamp down on animal cruelty came with the ratification – 23 years late! – of the European Convention for the Protection of Pet Animals.

The **new law (201/2010)** not only increases the penalty for killing an animal up to two years imprisonment, and mistreatment up to 18 months, or a fine from 5 thousand to 30 thousand euros, but also introduces a **new crime**, the **illicit trafficking of companion animals**, to counter the serious phenomenon of smuggling puppies from Eastern Europe. If the animals do not have individual identification and health certificates, the traffickers can be punished with a prison sentence from three months to one year and a fine from 3 thousand to 15 thousand euros, which goes up if the puppies are less than twelve weeks old, while for the illegal import, transportation and sale of puppies and kittens there is a fine of up to one thousand euros per animal imported, 2 thousand euros if aged under three months. This is a law that animal welfare associations have been calling for for some time, and that makes it possible to effectively combat an illegal trade worth 300 million euros a year.

The XVI legislature also **reformed the highway code (2010)** and the **law on condominiums (2012)**, both of which introduce key changes regarding animals. Law 120/2010 introduces the obligation to stop and aid an injured animal in the event of a road accident. In particular, paragraph 9-b of Article 189 of the Code requires those who have caused an accident resulting in injury to one or more pets, livestock or protected species to stop and provide assistance to the injured animals. Failure to comply is punished with a fine from 389 to 1,559 euros. The obligation to provide timely assistance also applies to the road users who did not cause the accident but were involved in it. In this case, failure to comply incurs a smaller fine. Law 220/2012, which contains new rules on condominiums, explicitly states that condominium regulations cannot prohibit the owning or keeping of pets. The rule also applies to the common areas. People can only be prohibited from keeping a pet when this is stated in their rental contract.

The subsequent legislature approved the European Delegation Law 96/2013, which transposed the EU

Directive 2011/63 on the protection of animals used for scientific purposes, introducing key limits on the use of primates, dogs, cats and endangered species, and the **complete ban on breeding "dogs, cats and non-human primates" for experimentation**: a successful outcome after years of protests against the Morini laboratory beagle farms (Reggio Emilia, closed in 2010) and Green Hill (Brescia, closed in 2012). This has been transposed into Legislative Decree 26/2014 which regulates animal testing in our country.

Article 77 of the environmental bill linked to the **2015** budget (Law 221/2015), while not overturning the traditional distinction between person and thing, introduces a significant new development: **pets cannot be seized by debt collectors**. This also applies to therapy or support animals owned by the debtor, his/her spouse, cohabitant or children. In essence, **law makers are acknowledging the positive role and sentimental importance of animals** and excluding them from the possessions that can be seized.

Another major innovation, in terms of both organization and principle, was introduced at the end of the legislature with the **reform of the civil protection body** (Legislative Decree No. 1 of 2 January 2018) which decrees that **animals are now to be covered by the activities of the civil protection body**, namely interventions "carried out to provide assistance and rescue services to communities and animals affected by disasters, and to reduce the impact of the latter." This new inclusion makes it possible to improve on the impromptu and often ineffective efforts to provide aid, and better organize the work of volunteers engaged in the rescue, recovery and management of animals, especially pets, in the event of natural or human-made disasters.

With the XVIII legislature, the efforts of deputies and senators shifted up a gear. Following the example of the European Parliament and based on some pilot projects, the **Parliamentary Intergroup on Animal Rights**, chaired by the Hon. Michela Vittoria Brambilla, was established. Not a discussion group but a genuine cross-party think tank with **four main objectives: constitutional reform, the adaptation of criminal and civil laws regarding animals, combating the stray animal problem and reducing taxes and health expenses** applied to pet owners. The first **objective** has been accomplished and represents a genuine milestone, not only because the change affects the fundamental principles of the Constitution (something that never before implemented in its history). The **new text of the Constitution**, in force since 9 March, finally includes the explicit **protection** of the environment, ecosystems, biodiversity and **animals** (the latter in the manner and within the limits provided for by a state law). Italy had been lagging behind its other European partners in this regard. Germany, for example, sanctioned the protection of the environment in 1994, including an important phrase from our own Constitution: "also in the interest of future generations", and in 2002 extended this protection to animals.to constitutional protection

The reform objectively gives new impetus to the measures the Senate Justice Committee is working on, with the aim of **reinforcing animal protection using both criminal and civil measures**. One of the most urgent changes, and the most likely to gather support and be accomplished before the end of the legislature is the introduction of harsher penalties for those who mistreat or kill animals. France has already implemented this with its recent law to "combat mistreatment" and "strengthen the bond between humans and animals", and Spain is also working in this direction. In France the mistreatment of animals is now punished with a maximum of up to 3 years imprisonment and a fine of up to 45,000 euros. If the mistreatment causes the death of the animal, the sentence can rise to 5 years in prison and a fine of 75,000 euros. In Italy the maximum is 18 months and 30 thousand euros (50% more if the mistreatment leads to the death of the animal).

On the issue of stray animals and tax/health policies, the Intergroup worked actively on the occasion of the budget laws. The 2020 budget saw an increase of 1.5 million euros allocated for the purposes indicated by the framework law on stray animals – Law no. 281/1991, but with a specific aim: 60% of resources to be devoted to the Southern regions to implement extraordinary measures to prevent and control the phenomenon, and half a million euros for awareness and responsibility campaigns. More limited measures, but nonetheless meaningful after years of inaction, were introduced on the tax front, with an increase in the deductible figure for veterinary expenses implemented in two stages (2020 and 2021): the IRPEF deduction of 19 percent on veterinary expenses exceeding 129.11 euros now applies up

to a maximum of €550. Given the state of public finances, at present the question of **reducing VAT on pet food and veterinary treatments** is not feasible, despite pressure from the Intergroup each year. Following the vote on the 2021 budget law, as of 24 May 2021, dogs and cats can be treated with drugs approved for human use, instead of much more expensive veterinary drugs. The same law foresees funding of 10 million euros (subsequently increased by 3 million euros for 2021) to municipalities that are insolvent or at risk of insolvency, to bring animal shelters up to standard. **During the Covid emergency, the Intergroup worked to ensure that pet food and services were included among the services considered essential.**

The future objectives of the Parliamentary Intergroup on Animal Rights

"The most important challenges that need to be tackled in the short to medium term – observed the Hon. Brambilla, chair of the Intergroup - include tightening sanctions for the mistreatment and killing of animals and implementing tax and financial policies more favourable to owners. The increase in poverty due to the effects of the Covid emergency and now the war makes it more difficult for families to bear the current tax burden involved in maintaining animals, which carries the risk of pet owners having to cut corners on health costs, thus hindering preventative strategies. **Reducing VAT on food and veterinary care is a common sense proposal and it is something we are determined to pursue, to apply the "one health" principle** that the World Health Organization has long championed, and to **stimulate recovery by strengthening one of the most dynamic and resilient sectors of our economy, in line with the European project of VAT reform** that aims, among other things, to foster the ecological transition, the digital transition and public health".

HEALTH AREA

THE CHANGES IN VETERINARY MEDICINE IN ITALY: INNOVATION AND TRADITION¹⁵

At present there are 27,200 veterinarians active in Italy. 70% of these are self-employed and work with pets. Women account for more than half (51.8%). The average age is 52. There are 8,600 authorised veterinary facilities throughout Italy, 74% of which are practices.

Pets are now protected by the Italian Constitution

For 15 years, the Assalco Zoomark Reports have expressed the hope that the role pets already play in families and society will also receive legal recognition. 2022 saw a historic development: animal protection was included in Article 9 of the Italian **Constitution**. It is hoped that the legislative implementation of this fundamental principle of the Italian Republic will translate into social and fiscal policies for households and pet owners.

The veterinary interpretation of article 9 can be summed up in three words: prevention, animal health and animal welfare, which, when taken together, add up to overall quality of life for animals. When it comes to living with a pet, this also affects the owner's quality of life, given the increasingly interdependent emotional bonds between humans and companion animals.

The trusted expert: a key figure for pet owners

In the last 15 years, as documented by the surveys conducted by the Italian National Association of Veterinarians, vets have become **the key "influencers" for pet owners**.

Italian pet owners view their vet as an indispensable point of reference for any issue - from nutrition to parasite control, hygiene and behaviour - throughout the animal's life, from weaning to aging. People are also increasingly turning to vets for advice not strictly related to health, such as cleaning, grooming, accessories and toys.

Vets as a point of
reference for pet
owners

91% of owners have a trusted veterinarian. 94% of them state that they follow their vet's indications on health, care and well-being of their pet to the letter, and an increasing number (81%) ask vets for advice on dietary conditions that require special measures and a specific veterinary diet.

The work of vets during the pandemic

The **Covid-19 Pandemic** heralded a major change in veterinary practice, highlighting how deeply attached people are to their pets. During the 2020 lockdown, and throughout the emergency in 2021, people's relationship with their trusted veterinarian grew stronger. The emotional bond with pets has made the relationship we have with them even stronger and increased their sentimental value. The result has been an increase in veterinary care. It is now increasingly rare that people only take their pets to the vet in an emergency or when an illness has already progressed. There is a sharp increase in the number of owners who are careful about prevention and who have learned to recognize when their pet is not well.

41% of vets saw an increase in business as a result of the pandemic, especially among existing clients who increased the frequency of their consultations. Since the beginning of the pandemic, 86% of facilities have maintained an appointment system for visits, a measure adopted to comply with social distancing rules

¹⁵ Text by ANMVI - Italian National Association of Veterinarians

which has now become widely established, as both the vets and their clients appreciate it.

The new role of pets in families

In the last 15 years the **law** has changed and of course the legal affirmation of the value of companion animals has not gone unnoticed by the veterinary profession, including with regard to minors and the elderly.

87% of pet owners are convinced that pets help improve people's immune systems, given that they foster socializing and thus contribute to the psychophysical health of the owner, including elderly owners. There is strong demand for stricter rules (82%) regarding the care and protection of animals and harsher penalties (89%) for those who commit crimes against animals.¹⁶

The emotional and sentimental value of companion animals is increasingly evident to vets. In medical and scientific terms all this has translated into a spike in the demand for **increasingly specialized veterinary care**, which has produced extensive research literature and raised the bar for technological, pharmacological, nutritional and clinical/therapeutic solutions currently available to the highest ever level.

For 56% of owners, spending on veterinary care is justified by the quality, professionalism and services on offer; only 34% of owners do not appreciate the price to quality ratio.

93% of owners pay attention to the professional's qualifications and the quality of the facility, attributing increasing importance to both advanced specialised training qualifications and quality certifications.

The specialist advice provided by Veterinarians represents 83% of the consulting offered, with behavioural advice being prevalent.

Pet food: a resource for pet owners

In this scenario of scientific progress, pet food deserves a mention alongside veterinary medicine. Nutritional science confirms that **industrial pet food** is tailored to meet the dietary needs of pets of all species and all ages. Industrial pet food, created to respond to the everyday needs of families juggling life

Pet food products:
good for pets,
practical for owners

between home and work, is now supported by scientific evidence, a significant amount of nutritional research and formulations guaranteed to be good for lasting health. An appropriate diet can prevent or counter disease, reduce the risk of obesity and eliminate any risks associated with home-made foods. Household leftovers or

home-made concoctions can be harmful or even a source of food-borne toxins. The **food safety** of pet food, on the other hand, guarantees control of manufacturing processes from the choice of raw materials to packaging.

Pet food is recommended by 97% of Italian veterinarians. 86% of vets believe that pre-packaged industrial food is the safest. 20% of Italian veterinary facilities provide food products directly to the client. The reasons why this number is so low include organisational and logistical issues (76%), and the presence of a store in the vicinity (13%). Only 7% of pet owners now opt for homemade food (10 years ago it was 18%), and cat owners above all are moving away from homemade preparations.

¹⁶Source: SWG. 2021