

Italians choose industrial food for their pets

The pet food market for cats and dogs has grown by 1.7%: this is the information given by the ASSALCO – ZOOMARK 2014 Report. Pets are ever more part of the family to the point that 89% of pet owners confirm that they do not let their pet want for anything, not even in a difficult moment like the present.

29th May 2014 – The Italian market for pet food products again presents positive dynamics for the year 2013 according to what has been observed by the 2014 ASSALCO – ZOOMARK Report.

Limiting the analysis to the main segment which is constituted by **cat and dog food**, the growth in turnover with respect to 2012 is equal to **+1.7%**, for a total of **1,776.3 million euros**¹.

Cat food is worth 945 million euros whilst dog food sales is reported to be 716.1 million euros. To these figures the turnover generated by **snacks and treats** must be added, a segment undergoing great development, and which is constituted by snack products with functional aims, and by treats which are usually given as rewards. Functional snacks and treats have a **13.6% value growth**, confirming the fact that this segment is that with the most interesting dynamics, for a total turnover of 115.2 million euros.

The market is increasing in value as cat and dog owners still wish to guarantee them healthy, correct and balanced diets that industrial food offers being specifically studied on the basis of the pet's necessities. The positive trend of the market is tied to the tendency that many owners purchase high quality, premium, and super premium food, **choosing their purchases with the wellbeing of their pets in mind**. Another reason for the growth in value is the capability of both brand and distribution producers to modulate their offers on the basis of the necessities of the consumer, taking into account both packaging practicality and the specific needs of the pet.

In a scenario of ever decreasing consumption where even the Grocery market has registered a growth equal to zero, the pet food market has proven to be more resistant to the present market contractions regarding consumption.

By analysing the data, it is possible to note that each channel presents distinguished dynamics. The **traditional pet shop** is that which has mostly been affected by the sensibility of the customer to the price of the product, whilst the **pet shop chains** confirm an interesting phenomenon with a value growth of 17.9% and must be attentively observed for any future developments.

As well as the "traditional" channels, even the pet food market is widening its horizons to the **new opportunities generated by the Internet**, even though it remains a "niche" channel, and to the **"mobile"** channels which consent the distribution of targeted offers for each customer near the shelf or close to the retail store.

Growth is the trend which associates all market segments except for the moist dog food which has undergone a decrease of 1.1%. Dry cat food has undergone a slight increase (+0.5%), whilst moist cat food and dry dog food are confirmed as the "drivers" of the general increase (+1.1% and +2.4% respectively). The **moist food** segment is once again confirmed as the most important: registering about 902.2 million euros, which equals 50.8% of the total market. This confirmation is facilitated by an enrichment of references, giving added value in small packaging, and gastronomic or functional characterisation, with particular reference to cat food. The **dry food** segment is, on the other hand, worth 758.9 million euros and is responsible for 42.7% of the total market. It is made up of 24.1% dry dog food and 18.6% dry cat food. As already noted, **functional snacks and treats** represent the most dynamic segment with a value growth of over 13% and a total market weight of 6.5%. Although cat snacks have grown more than 25% on the sum of the three observed channels, the weight on the total pet food market of these products remains marginal as it is a category almost exclusively dedicated to dogs.

The present data is illustrated, together with numerous other updates, in the **7th edition of the Assalco-Zoomark Report**, the annual report that informs operators of this sector and lovers of the animal world on the trends and tendencies of the pet food and pet care market. The Report is written by Assalco - Italian Association of Pet-Food

¹ IRI Information Resources data, Year Terminated December 2013 – Total Market: Grocery + Traditional Pet Shop + Pet Shop Chains

and Pet-Care Industries - and Zoomark International - International Exhibition of Products and Accessories for Pets. Two important bodies have, as always, collaborated and contributed to the realisation of the document: on the one hand ANMVI: National Association of Italian Veterinary Doctors, and on the other, IRI Information Resources, a leading company for market research that, this year, undertook the survey which has enriched the Report.

The data gathered by the **IRI survey** have evidenced just how important the relationship between a pet and its adoptive family really is. Luigi Shiappapietra, President of Assalco, affirms *"The economic context has not had excessively negative effects on our market because pets are considered, to all extents and purposes, members of the family and the person buying pet food is not willing to sacrifice pet food which is correctly balanced, healthy and specifically studied for the necessities of their pet. According to the IRI survey, 89% of pet owners are unwilling to make cuts when purchasing for their pets and 30% declare that they have not modified their buying habits due to the economic crisis"*. Putting together this information and the factors considered when buying pet food, the first of which is the advice of the vet, it seems evident that pet owners are strongly aware of the importance of a diet which is specifically calibrated to the needs of those pets that, through their company, enrich their owners lives.

Looking, on the other hand, at the analysis of the market that regards **food for other animals**, it is possible to observe that the large distribution organisations have undergone a value decrease of 6.3%. That same channel, however, continues to show a favourable moment with regard to **accessories** which shows a positive trend of +3.1% with respect to the year 2012. This growth is especially driven by **anti-parasitic products** and this confirms the interest of the pet owner in the wellbeing of their pet. **Cat litter** recovers with respect to last year and closes 2013 with a growth of +5.5.

These and other contents in the ASSALCO – ZOOMARK 2014 Report, available at:

<http://www.assalco.it/index.php?action=shownews&id=1&nid=5321>

http://www.zoomark.it/media/zoomark/documenti/assalco/Assalco-Zoomark_Report_Excerpt.pdf

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ASSALCO – Italian Association of Pet-Food and Pet-Care Industries gathers the main Companies in the pet food and pet care sectors that operate in Italy. The member Companies represent **over 90% of the National market** regarding pet food. On a European level, ASSALCO is member of FEDIAF, the European Pet Food Industry Federation.

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