

An event by:



6.5 → 9.5 / 2019
BOLOGNAFIERE
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ZOOMARK 2019
INTERNATIONAL

PRESS RELEASE

THE ITALIANS AND THEIR PETS: THE RATIO IS 1 TO 1. A SUMMARY OF THE 2018 ASSALCO-ZOOMARK REPORT ON PET FOOD AND CARE

The 2018 ASSALCO – ZOOMARK Report on Pet Food and Pet Care (regarding 2017) has just been published by the Italian National Association for Pet Food and Pet Care Companies (ASSALCO) and Zoomark International, the international trade fair for pet products and accessories organized by **BolognaFiere**.

Zoomark International 2019 (on in Bologna from 6 to 9 May) will see the presentation of the 2019 Assalco-Zoomark Report, covering market trends in 2018.

The report offers an annual snapshot of market trends and social and institutional developments, documenting the growing importance of the role pets play in Italy. It is produced in collaboration with some of the leading players in the industry, supported by scientific evidence, research and contributions from experts (including Centro Studi Sintesi, IRI Information Resources and the Italian National Association of Veterinarians-ANMVI).

What emerges from the Report is that Italy is one of the most "pet friendly" countries, both in terms of numbers and the care devoted to the animals: they are not only recognised members of our families, but also of our communities. In public opinion in Italy there is increasing awareness of the social role of pets and people are acknowledging the need for greater institutional and legal recognition.

According to an international survey carried out in the United States and several European countries, 67% of our compatriots live with at least one pet, putting Italy just behind the United States and Poland, in the lead at 70%. The Czech Republic and France are in joint fourth place (65%). Italy is also estimated to be the **number one European country in terms of the number of pets in relation to the population, with a one to one ratio**. Excluding fish and considering the total number of dogs, cats, birds, small mammals and reptiles, Italy has 50.3 pets per 100 inhabitants, putting it in first place ahead of France (46.5), Poland (41), Spain (40.2), Germany (39.8) and the United Kingdom (30.3).

The Italians' love of animals is also evident in other aspects. Indeed on a scoreboard of "pet-friendly" countries drawn up by a well-known travel site, Italy ranks third in Europe after France and Germany. The site examined accessibility to public transport, shops and restaurants.

Though there is as yet no national register of pets, **the number of pets in Italy is estimated to be stable at around 60 million**. Or 60,400,000 to be precise, according to the latest data from Euromonitor. Fish are the biggest category: with around 30 million in Italian homes, they account for around half of the total number of pets. Fish are followed by birds (just under 13 million), cats (7.5 million), dogs (approximately 7 million) and, finally, small mammals and reptiles (3 million). In a recent survey by Eurispes on people living with pets, 53.5% of those interviewed stated that they devote a considerable amount of their free time to their animal's needs (walking, play, outdoor activities). Along the same lines, 46.2% of respondents declared that they only go on holiday if their pet can come too. Around 58% of those interviewed calculated that they spent up to 50 euros per month on their pet, while more than 30% spend between 50 and 100 euros.

The number of pets belonging to people in the over 65 age group in Italy merits special attention: **one out of two pensioners has a pet**. According to the latest study by Federanziani, the percentage of animals owned by senior citizens has risen from 39% in 2015 to 55%. **51.6% of respondents have a dog, while 33.3% own a cat**. 80% of owners take their dogs out daily, while 71.2% of those living with a cat say they play with it every day. In addition to this, the over 65s not only look after their own pets, but also those of family and

friends, a situation which applies to 66.7% of respondents. Lastly, it was observed that despite the fact that for almost one out of two over 65s the monthly spend on pet food and care had a significant or moderate impact on the family budget, for 78% of respondents, having a healthy, happy pet was fundamental. Not surprisingly, animal welfare was the third most important issue (after work and security) that seniors felt deserved more attention in politics.

This sentiment is so deeply felt that in the last five years politicians from all parties have submitted proposals for laws regarding pets, at the rate of one a month. Compared to the 22 projects recorded in the five year period 2008-2013, **during the last parliamentary term (2013-2018) 58 bills about issues related to pets were presented.** Yet none of these was approved. Despite the importance of the issue in public opinion, most of the bills were never even discussed. They advanced various proposals on the issue of pet welfare, from economic allowances to the notion of pets as unattachable assets, to fostering, improving quality of life, the creation of a National Register, and the recognition of pets as sentient beings in the Constitution, etc.

Nutrition is a vital part of pet health. From the Report it emerged that industrial pet food supplies a complete, balanced diet. The formulations on offer provide all the necessary nutrients and take account of different needs (according to age, breed, size, the animal's lifestyle, etc.) in line with the specifications drawn up by prestigious international bodies which are gathered and updated in the guidelines released by FEDIAF (European Pet Food Industry Federation). The pet food produced and sold in Italy is safe and guaranteed, thanks also to the National Plan for Animal Nutrition supervised by the Ministry of Health. In the last three years, out of 801 samples only four non-compliant products were identified. **According to the latest studies available, industrial pet food is by far the preferred choice in Italy (77%).**

In 2017, the Italian market for dog and cat food recorded a turnover of 2,051 million euros, with total sales of 573,940 tons. The positive trend was confirmed, with a 3.8% increase in turnover compared to the previous year, and sales volume rose by 2.4%, a growth rate higher than that of packaged consumer products (+2.3% in 2017). In the 2014-2017 period, the market developed with a compound annual growth rate of 3.6% in value and 1.6% in volume.

In 2017 the market for food for other pets continued to decline, with a turnover of just over 15 million euros: sales fell 6.1% in value and 2.8% in volume. As for the accessories market (hygiene products, games, leashes, kennels, bowls, cages, aviaries, aquariums, turtle tanks and various utensils) in the mass retail sector, in 2017 sales volume remained stable while turnover dipped slightly, -2%, with total sales of around 72 million euros. This represents the sum of sales in hypermarkets, supermarkets and independent retailers. The market for pet hygiene products (shampoos, brushes, deodorants, and everything to do with grooming and hygiene), continues to grow, with an increase of 15% in value compared to 2016. The other sectors - chew toys, toys, anti-parasite treatments - have seen a drop in sales. Cat litter products, recorded separately, fell slightly in terms of volume, -0.4%, but rose in value by 1%, with a turnover of 68 million euros.

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