

an event by



**ZOOMARK 2021**  
INTERNATIONAL

Con il patrocinio



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

## **PET FOOD: FOODS FOR CATS AND DOGS CONTINUE TO DRIVE THE ITALIAN MARKET**

**In the time of the pandemic the value of household pets is growing**

**The 14<sup>th</sup> edition of the annual Assalco – Zoomark Report will be presented on 10 November**

In the year ending in June 2021, the **market for cat and dog food products in Italy** added up to a total business volume of **2,431 million euros** (and an increase in turnover of +8%) for the channels of Grocery Retail <sup>1</sup>, Traditional Pet shops <sup>2</sup>, Pet shop Chains <sup>3</sup>, Grocery Retail own Pet shops<sup>4</sup> and General Online trading (Grocery Retail groups and Amazon)<sup>5</sup>.

The main distribution platforms – Grocery Retail, Traditional Pet shops, Pet shop chains – amount to a combined business volume of 2,338.7 million euros and demonstrated a positive trend of **6.4%**.

The data analysed by IRI Information Resources is included in the **14<sup>th</sup> edition of the annual Assalco – Zoomark Report** and will be presented at the inaugural Conference of **Zoomark International**, the international B2B event for products and equipment for pets, organized by BolognaFiere and held from 10 to 12 November 2021.

### **RELATIONSHIPS WITH PETS ARE CHANGING, THE PET POPULATION IS GROWING**

In a period characterized by the ongoing Covid-19 pandemic, attention to pets has increased significantly and there is a growing awareness of the many physical and psychological benefits they bring to households. The greater value of the relationship with pets has led to an increase in the pet population: according to Euromonitor, there are **an estimated 62 million pets**<sup>6</sup> in Italy, including almost 30 million fish, more than 16 million dogs and cats, about 13 million birds and more than 3.5 million small mammals and reptiles.

### **CATS AND DOGS CONTINUE TO DRIVE THE PET FOOD MARKET**

Cat and dog food continues to be the most important component of the Italian pet food market. The **Grocery Retail channel** accounts for 56.5% of total turnover, or €1,373 million, and 75.9% of volumes, or 503,835 tonnes. In the year ending June 2021 IRI reported a 6.2% increase in turnover and a 4.5% increase in volumes. This was followed by **Traditional Pet shops**, which accounted for 14.2% of volumes (corresponding to approximately 93,953 tonnes) but generated 26.9% of value (€653.6 million in turnover), and the **Pet shop**

---

<sup>1</sup>Grocery Retail refers to the total of hypermarket, supermarket, superettes, convenience stores(including micromarkets, retail points smaller than 100m<sup>2</sup>) and discount supermarket

<sup>2</sup>Traditional pet shops number 4,857 in Italy, data updated to June 2019 – source: IRI

<sup>3</sup>For the IRI panel, Pet shop chains refers to: L'isola dei Tesori, Maxi Zoo, Croce Azzurra, Italpet, Zoo Megastore, Agrizoo2, Arcaplanet, Fauna Food and Zoomarket are not included in the IRI survey but, nonetheless, number 413 sales points – data updated to August 2020

<sup>4</sup>Grocery Retail own Pet shops: specialized shops belonging to Grocery Retail groups. Leader panel of 86 sales points: Amici di Casa Coop, Petstore Conad, Animali Che Passione, Joe Zampetti, Pet Elite (Selex) and Ayoka (Vegè Multicedi) - source IRI.

<sup>5</sup> IRI E-Commerce: tracking online sales of general online traders and pure players (Esselunga, Carrefour, Pam/Panorama, Coop, Bennet, Unes, Finiper, Everli, Gros, Così Comodo, Crai, Basko, Lillapoix, Risparmio Casa, Nonna Isa, Più Me and Amazon).

<sup>6</sup> Source: Passport – Euromonitor International, May 2020 (estimates recalculated)

an event by



**ZOOMARK 2021**  
INTERNATIONAL

Con il patrocinio



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

**Chains**, which accounted for 7% of volumes and 12.8% of value, for a total of 46.7 tonnes and €312 million, with a particularly significant growth trend (+19.7% in value and +13.8% in volume compared with the previous year).

Among the relatively new distribution channels, **Grocery Retail own Pet Shops** achieved a turnover of €43.6 million in the year to June 2021, accounting for 1.8% of the total market (physical and online channels). The health emergency provided a strong boost to **e-commerce**, in line with what occurred in other FMCG segments. Data collected by IRI on online sales of dog and cat food by generalist operators (Grocery Retail groups and Amazon) show a turnover of €49 million: although this channel currently represents only 2% of the total pet food turnover (physical and online channels), it has grown by 104% compared to last year and looks set to become even more significant in the future.

Comparing, however, the cat and dog food market, including wet, dry and snack foods, IRI notes that **cat** products represent 53.5% of the value achieved in the Grocery Retail, Traditional Pet shop and Pet shop Chains channels, with a turnover of €1,251.5 million. Growth in value terms was 8.1%. **Dog** food accounted for 46.5% of the total Grocery Retail, Traditional Pet shop and Pet shop Chains market in value terms, or €1,087 million.

#### **FOOD FOR OTHER PETS: BIRDS AND RODENTS STILL LEADING THE WAY**

The pet food market for smaller animals saw the year ending in June 2021 with turnover of just over **€12 million** at hypermarkets, supermarkets and superettes, with a growth in volume of 1.9%.

The main segment is that of **ornamental birds**, which covers 42.9% of the value and just under 50% of volumes. This segment is followed by foods for **rodents** (31.4% of turnover and 39.6% of volumes). Products for feeding **fish** and **turtles** represented, respectively, 12.6% and 11.8% of this market segment.

#### **MORE ATTENTION TO PET HYGIENE AND ACCESSORIES**

The increase in the pet population and more time spent with pets during the pandemic was reflected in the growth experienced for **hygiene products, toys and accessories**. IRI's survey of Grocery Retailers confirmed a turnover of **€75 million** in the year to June 2021, up **4.1%** on the previous period.

In this category, the most dynamic segments were hygiene products (absorbent pads, wipes, shampoo, brushes, deodorants, etc.), up 7.1%, and toys, up 14.6% in value terms. **Cat litter**, taken separately, saw a turnover of over **78 million euros** in the same channel, up **4.6%** in value terms.

#### **Nota: THE ASSALCO-ZOOMARK REPORT**

The Assalco-Zoomark Report is the annual publication by Assalco, the National Association of Pet Food and Pet Care Industries, and Zoomark International and is a point of reference for the entire pet sector.

The Report documents the evolution of the buying habits of pet owners (Market Area), the presence and growing importance of pets in Italy (Social Area), the latest surveys on veterinary facilities (Health Area). IRI Information Resources and ANMVI (the National Association of Italian Veterinary Doctors) contributed to the drafting of the Report.

The digital edition of the Report will be available from November 10 on the websites Assalco.it and Zoomark.it

an event by



**ZOOMARK 2021**  
I N T E R N A T I O N A L

Con il patrocinio



**ASSALCO**

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

**ZOOMARK INTERNATIONAL – Media contact**

**Communication and External Relations Manager**

Isabella Bonvicini - [isabella.bonvicini@bolognafiere.it](mailto:isabella.bonvicini@bolognafiere.it)

Tel. +39 051 282 920 / +39 335 7995370

**Press Office**

Gregory Picco - [gregory.picco@bolognafiere.it](mailto:gregory.picco@bolognafiere.it)

Tel. +39 051 282 862 / +39 334 6012743

**ASSALCO – Press Office**

Silvia Vergani

[silvia.vergani@b-story.eu](mailto:silvia.vergani@b-story.eu) - +39 349 7668102

Massimo Spagarini

[massimo.spagarini@b-story.eu](mailto:massimo.spagarini@b-story.eu) - +39 340 3587701

**ASSALCO - The National Association for Pet Food and Pet Care Industries** brings together the main companies in pet food and pet care operating in Italy. The associated companies today represent almost all of the national market for pet foods. At European level ASSALCO is a member of FEDIAF, the European Pet Food Industry Federation.

**BolognaFiere** - With around 100 events in Italy and around the world, the BolognaFiere Group is one of the leading companies in the trade fair sector and is Italy's most successful company in the sector in terms of revenues from abroad in key markets like Asia, Russia and North America. In Italy the Group boasts trade fair facilities in Bologna, Modena and Ferrara and is industrial partner of the Nuova Fiera del Levante in Bari. BolognaFiere operates in the direct organization and management of trade fair events and holds a leadership position in exhibition stand production services.