

Pet food: the Italian market has grown by 4.2% in value Turnover now exceeds 2 billion euros

Also growing is the market for pet accessories

11 May 2021 - The **Italian pet food market** continues to show positive progress. In 2020 the market grew both in terms of value (+4.2% compared with 2019) and volume (+2%), achieving an overall turnover of more than **2 billion euros**. The pandemic has been complicit in this growth as pets have assumed an increasingly important role in households, which now own **more than 60 million animals**, including cats, dogs, small mammals, birds, fish and reptiles. These are the initial indications of the **14th edition** of the **Assalco - Zoomark Report**, compiled by **Assalco**, the National Association for Pet Food and Pet Care Businesses, that will be presented at **Zoomark International**, which is scheduled to take place from **10 to 12 November 2021 at BolognaFiere**.

The event, the only in-person fair in 2021 will be the first international reference event for the sector following the suspension of trade fair activities as a result of the Covid-19 emergency. This eagerly awaited event is registering substantial demand from exhibitors (national and international) and operators that recognise the need to meet again at the Fair.

THE PET FOOD MARKET IS BEING DRIVEN BY PRODUCTS FOR CATS AND DOGS

Cat food and dog food continue to be the most significant categories in the Italian pet food market. In 2020, IRI found that sales in the main distribution channels – **Grocery, traditional Pet shops and Pet shop chains**¹ – amounted to **2,257 million euros for a total of 626,600 tonnes of pet food sold**, therefore registering respective increases of 4.2% and 2% on 2019. In addition to this data are the results achieved by the **pet shops in in Grocery Retail**², the new distribution format that has given life to some retail sections within Grocery Retail, which in 2020 sold **6,036 tonnes of cat and dog food**, for a value of **34.3 million euros**.

Concerning the age-old struggle between cat and dog, it is the former that is currently on top, driving Italians' spending on pet food. **Cat food** represents, in fact, **53.2% of the total value** of the market in Grocery, traditional Pet shops and pet shop chains, for a value a little over 1,200 million euros (+5.9% compared with 2019). **Dog food** represents the remaining **46.8% of the market** with a value of around 1,057 million euros, a figure that is also growing (+2.3%) compared with 2019.

BIRDS AND SMALL RODENTS LEAD THE WAY IN THE SEGMENT OF PETFOOD FOR SMALL PETS

The market for pet food for small animals in 2020 saw revenues of a little over **12 million euros** at hypermarkets, supermarkets and minimarts. Products for birds and rodents dominate the market: foods for **ornamental birds** represent **42.1% of the market value** and **50.5% of volumes**, while **food for rodents** makes up **30% of the value** and **38.9% of the volume**.

THE MARKET FOR PET HYGIENE PRODUCTS CONTINUES TO GROW

Data from IRI also shows growth in the compartment of **accessories for day-to-day pet care**, within which we can find products for hygiene, play, leads, pet beds, bowls, cages, aquaria – for fish and reptiles – and various related items. In 2020 this market recorded in the **Grocery Retail channel** a value equal to **72.8 million euros** and a **2.3% increase in value** and **6.7% in volume** compared with 2019.

¹ Panel IRI Pet shop chains represented by L'isola dei Tesori, Maxi Zoo, Croce Azzurra, Italpet, Zoo Megastore, Agrizoo2. Arcaplanet, Fauna Food and Zoomarket are not included in the IRI study.

² Pet shop Grocery Retail: areas specialized in sales of foods and accessories for animals and belonging to Grocery Retail organizations: the data contained in the report relates to a leader panels of 86 sales point with the retail groups: Amici di Casa Coop, Petstore Conad, Animali Che Passione, Joe Zampetti, Pet Elite (Selex) and Ayoka (Vegè).

The segment of **hygiene products** (mats, wet wipes, shampoos, brushes, deodorants and other beauty products) confirms its importance with a value of almost **33 million euros, up by 14.7%** compared with the previous year. Also the segment for **pet toys** has reached significant dimensions, with an overall business volume close to **6 million euros (+1.7%** compared with 2019).

Cat litter trays, a segment analysed separately, in 2020 recorded sales in the **Grocery Retail channel of more than 76 million euros, an increase in value of 3.1%** compared with the previous year.

"2020 confirmed the positive progress of the Italian pet food and pet care markets," stressed Gianmarco Ferrari, President of Assalco. "During such a dramatic time as the Covid pandemic, the role of pets in households has become even more important, as has been confirmed by Italians' heightened attention to pet foods and pet care products that are essential to their pets' wellbeing. As pet food and the veterinary services are essential services for pet owners, we are renewing our call for a rethink on the possibility to lighten the tax burden on pet-owning households." Added Ferrari. "Today in our country pet food and veterinary services are subject to VAT of 22%, the same as luxury goods. In other countries, like Germany, which considers the social role of pets, this VAT level is 7%, less than a third of the figure in Italy. We are urging, therefore, that pet food and veterinary services be repositioned within the special 10% bracket."

"We considered it important to confirm the hosting of the event in 2021," announced Gianpiero Calzolari, "to offer exhibitors and international operators from the pet industry the opportunity to meet in person for a strategic moment of interaction and networking with commercial contacts. We made this decision together with the companies, sensing from them their need to meet following a period in which the sector has demonstrated stability and a capacity for innovation. Over this last challenging year, in which it has not been possible to hold in-person events, we have launched new initiatives and consolidated important alliances to provide the sector with new business opportunities and to boost international competitiveness. We are sure that the acceleration in the vaccine campaigns worldwide, the consequent lifting of travel restrictions and the context of utmost safety that BolognaFiere will ensure at Zoomark International 2021 are vital to supporting the success of the event, which after this autumn edition will return to its traditional spring dates in 2023."

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ASSALCO – the National Association of Pet Food and Pet Care Businesses brings together Italy's main companies in the sectors of pet food and pet care. The companies that belong to the association today represent almost the entirety of the national market for pet foods. At European level ASSALCO belongs to FEDIAF, the European Pet Food Industry Federation.

BolognaFiere – With around 100 events in Italy and the world, the BolognaFiere Group is a leader in the trade fair sector and is Italy's most successful in terms of revenues generated abroad in key markets such as Asia, Russia and North America. In Italy the Group has fair venues in Bologna, Modena and Ferrara and is the industrial partner of the Nuova Fiera del Levante in Bari. BolognaFiere operates in the direct organization and management of fair events and boasts a leading role in exhibition stand services.