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BOLOGNA FIERE - ITALY



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THE 2022 ASSALCO-ZOOMARK REPORT: THE ITALIAN PET MARKET IS ON THE UP

Now in its 15th edition, the Report offers a snapshot of the changes in the Italian market for pet food and pet care products.

Constant growth: this, in a nutshell, is the scenario that emerges from the 2022 Assalco-Zoomark Report on the performance of the pet market in Italy. As always, the **key player** is **dog and cat food**, the main segment of pet food in Italy.

But let's take a closer look at the findings of the Report.

Pet food

In the 2007-2021 period the **Italian market for dog and cat food more than doubled its turnover**, from 1,163 to 2,533 million euros¹, with an average annual growth in value of +5.7%. According to IRI data, turnover was up by 7.1% and volume by 5% compared to 2020.

A surge in pet ownership

The growth in the market in the last two years can also be attributed to the rise in the number of people taking on dogs and cats that coincided with the **end of the first lockdown in 2020**.

More households buying pet products

The increase in the number of pet owners has resulted in a substantial rise in the number of households² buying dog and cat food, which now stands at **12.2 million**: about 1 million more than the previous year, and mostly young people of medium-high socio-economic status.

They represent **46.9%** of total Italian households (+3.4 points compared to last year).

Distribution channels

Compared to 15 years ago, the pet food market has seen profound changes in the weighting of the **specialized channel** and **Grocery**: the former has had an average annual growth rate of +8.3%, twice that of the latter (+4%).

Emerging channels of note include **supermarket petshops** and the **online channel**, which now accounts for 2.4% of the total market. The online channel, which grew during the pandemic, has attracted and retained **new shoppers**, breaking down the many cultural and cognitive barriers that appeared to be holding it back until a couple of years ago.

More attention to well-being

The growth of pet food is supported above all by an increase in purchases of **premium and superpremium products**, which are associated with **innovation** and increasing attention to pet welfare.

Hygiene and accessories

The market for hygiene products, toys and accessories is extremely dynamic, with **excellent performance in large-scale retail** (+5.8% compared to the previous period). The strongest segment is **cat litter**, which grew by 5% in the year ending December 2021.

1 Grocery + Specialized (+ IRI On Line in 2021). The IRI On Line channel excludes specialized e-commerce.

2 Source of data GFK - Consumer Panel: updated to year ending April 2021.