



# ZOOMARK

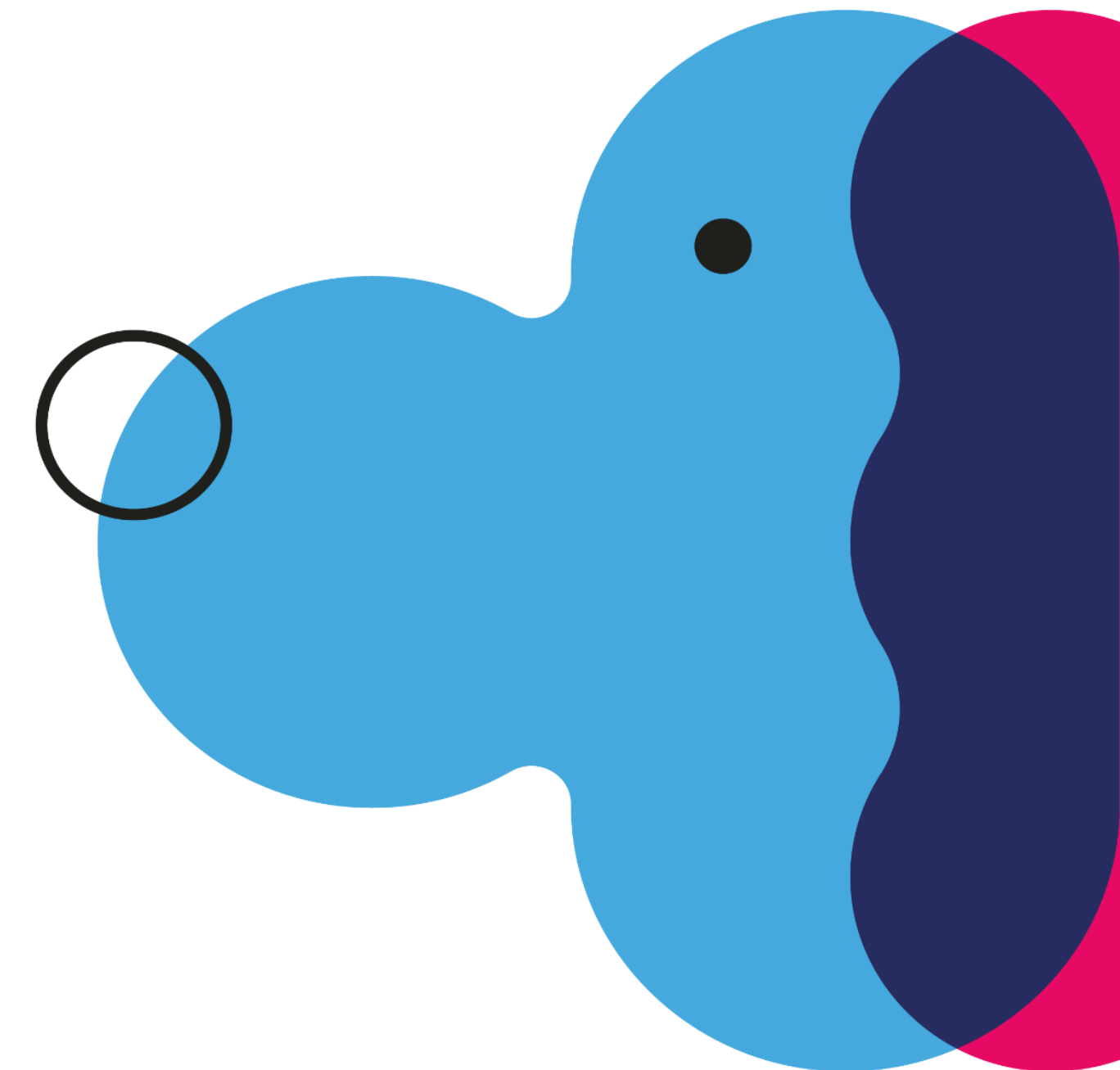
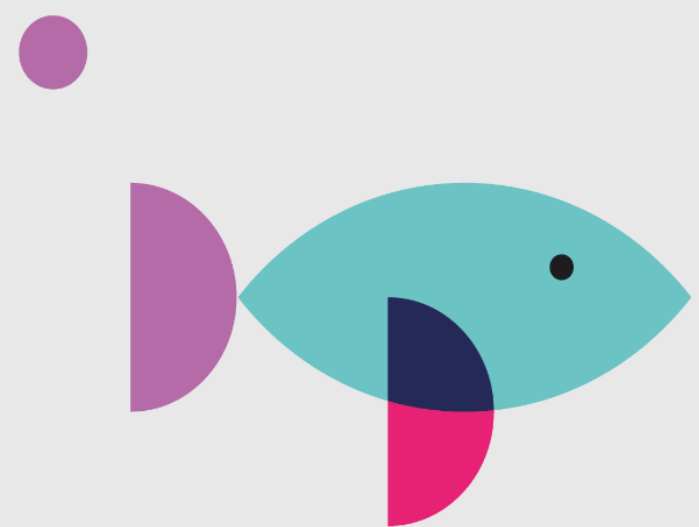
## Press Lunch

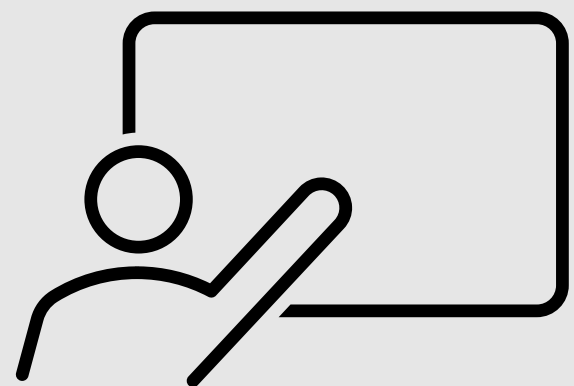
8 May 2024

From 12.30 p.m. to 1.30 p.m.\*

Hongkong room

NuernbergMesse





PRESS CONFERENCE  
8 May, 2024

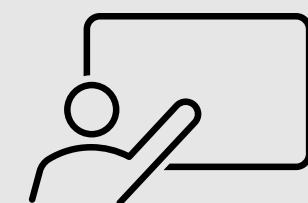
# Zoomark 2025: novelties and projects

**Luisa Bersanetti**  
Exhibition Manager



**ZOOMARK** 5–7  
May 2025

# Zoomark – Key Facts



# Record numbers of Zoomark 2023.




**1,060**

Exhibitors

From  
**57** Countries

 25%  
italian

 75%  
foreign

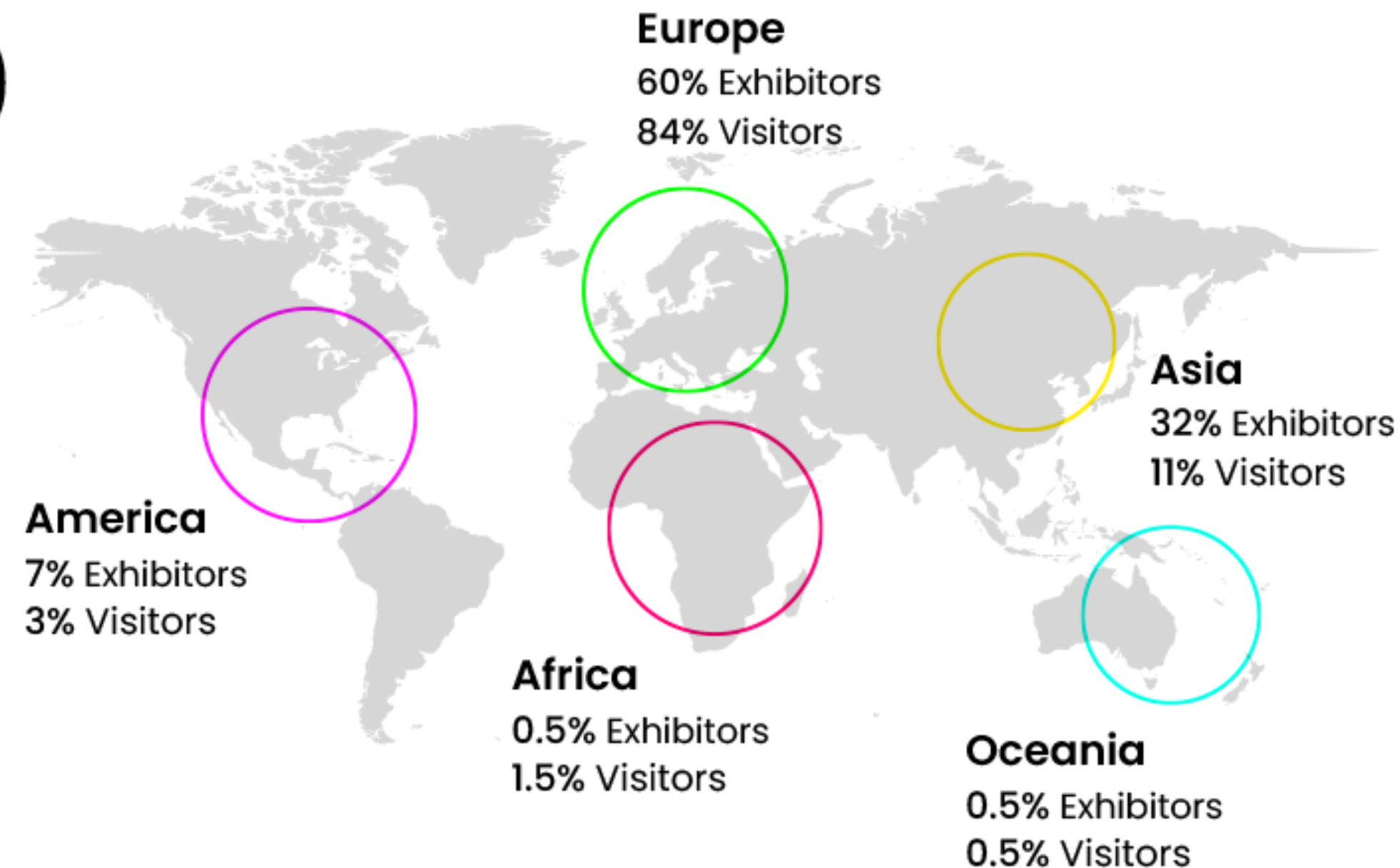
**27,950**

Visitors

From  
**120** Countries

 38%  
italian

 62%  
foreign



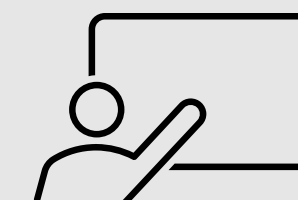
**1,200**

New products launches

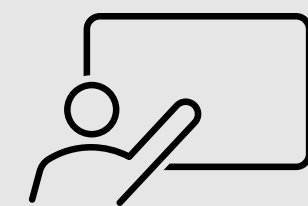


**95%**

Satisfied exhibitors

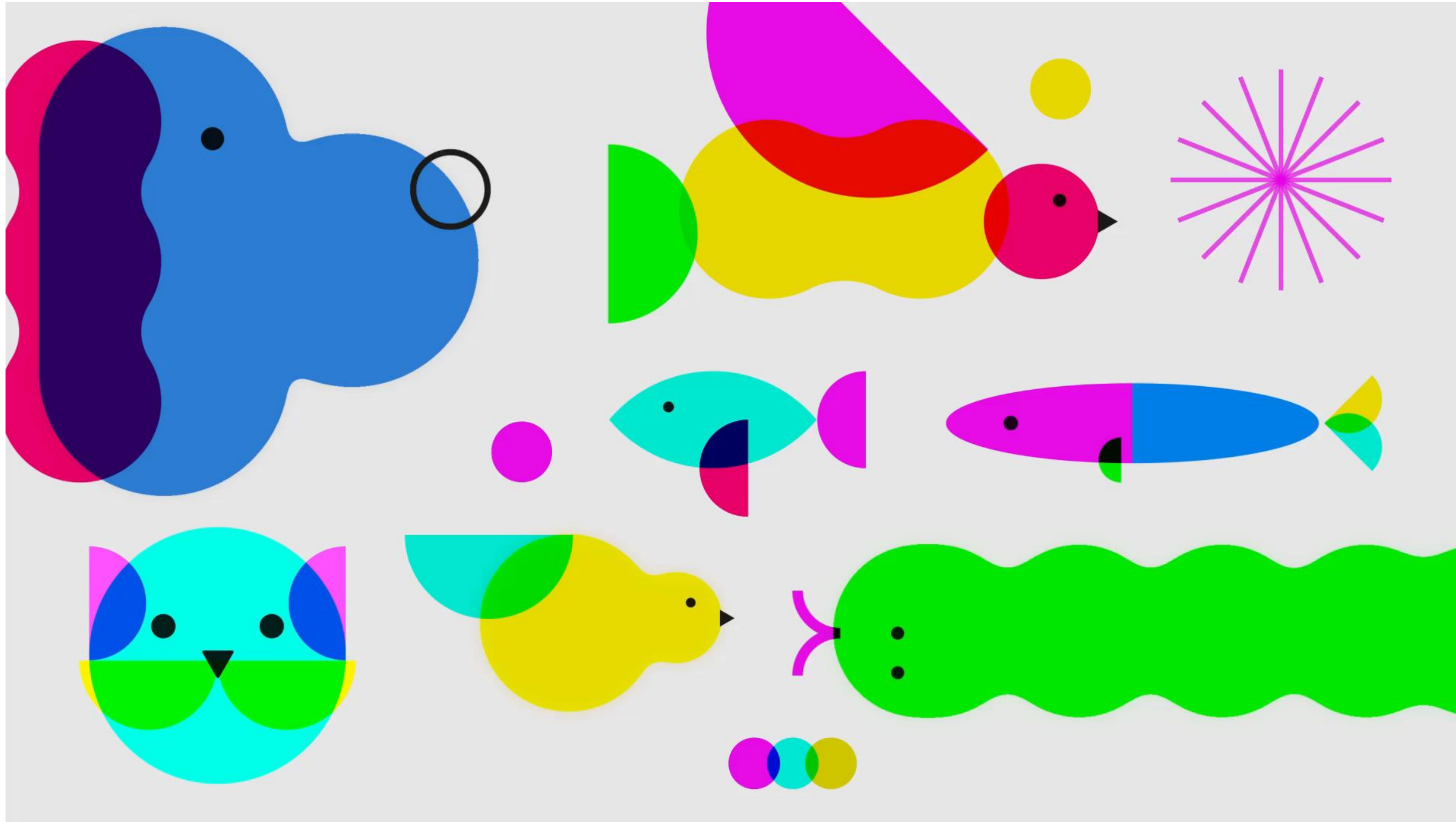


# Bigger and Bolder



# Bigger and Bolder

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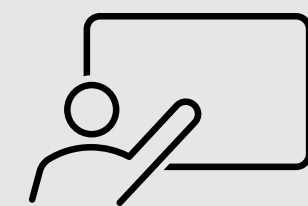
Branching out to new markets

Connecting with global players

Creating new alliances

Business network bigger than ever before

# International Bridge

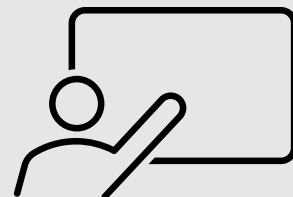


# China: a new frontier – PET Pavilion Focus



Private label  
and co-branding

Large-scale retail channel  
e-commerce platforms





# International Effort

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## India AND USA

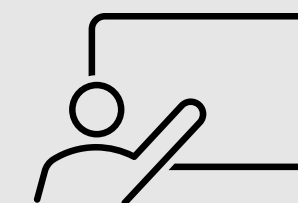
### IIPTF 2024

India International Pet Trade Fair



### Superzoo 2024

August - Superzoo (Las Vegas)



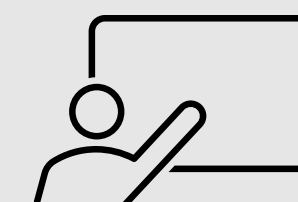
# International Bridge

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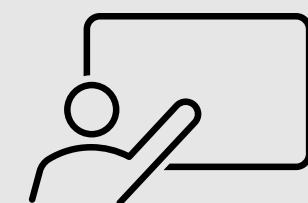
## Italy Pavilion

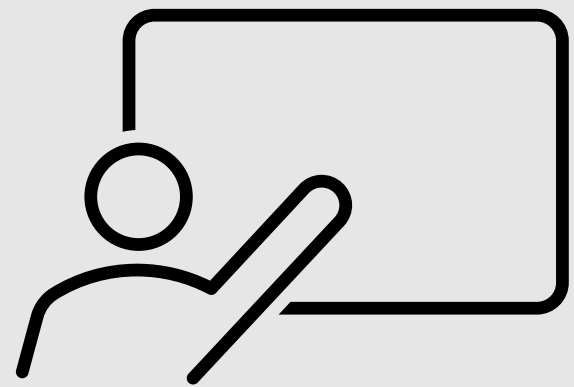
- promote B2B events in the respective countries
- **attracting visitors** to each other's markets
- Promoting Italian excellence

**petfair**<sup>®</sup>  
SE ASIA  
**BANGKOK, THAILAND**



See you in Bologna in less than a year's time  
Thank you!





PRESS CONFERENCE  
8 May 2024

## PET OWNERS IN ITALY

*Focus on non-food market*

**Mattia Barchetti**

**Nomisma - Head of Market Intelligence**

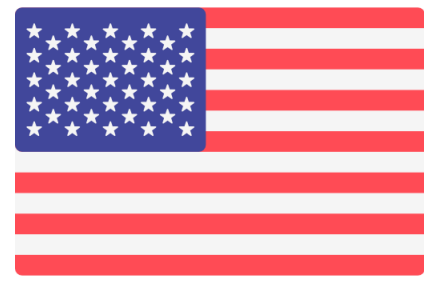


**ZOOMARK** 5-7  
May 2025

*Nomisma*

# The pet care market worldwide

## Total expenditure on pets in 2022



**130.0**

€ Billions

**+10%**  
Vs 2021



**33.0**

€ Billions

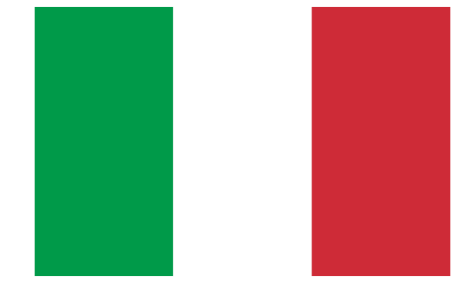
**+12%**  
Vs 2020



**53.6**

€ Billions

**+5%**  
Vs 2021



**6.8**

€ Billions

**+19%**  
Vs 2021

*non-food\**

**53%**

**38%**

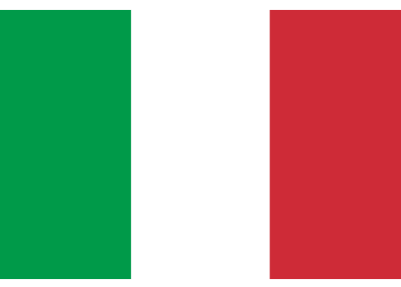
**46%**

**43%**

Source: Nomisma analysis on data from American Pet Product Association, Statista, FEDIAF and Istat. Note: for China the figure refers to 2021. (Exchange rate EUR/USD 2022 = 1,052; EUR/Yuan 2021 = 7,576)

\* Non-food refers to spending on everything that does not belong to the food category (accessories, medical expenses, other)

# Italian pet care market



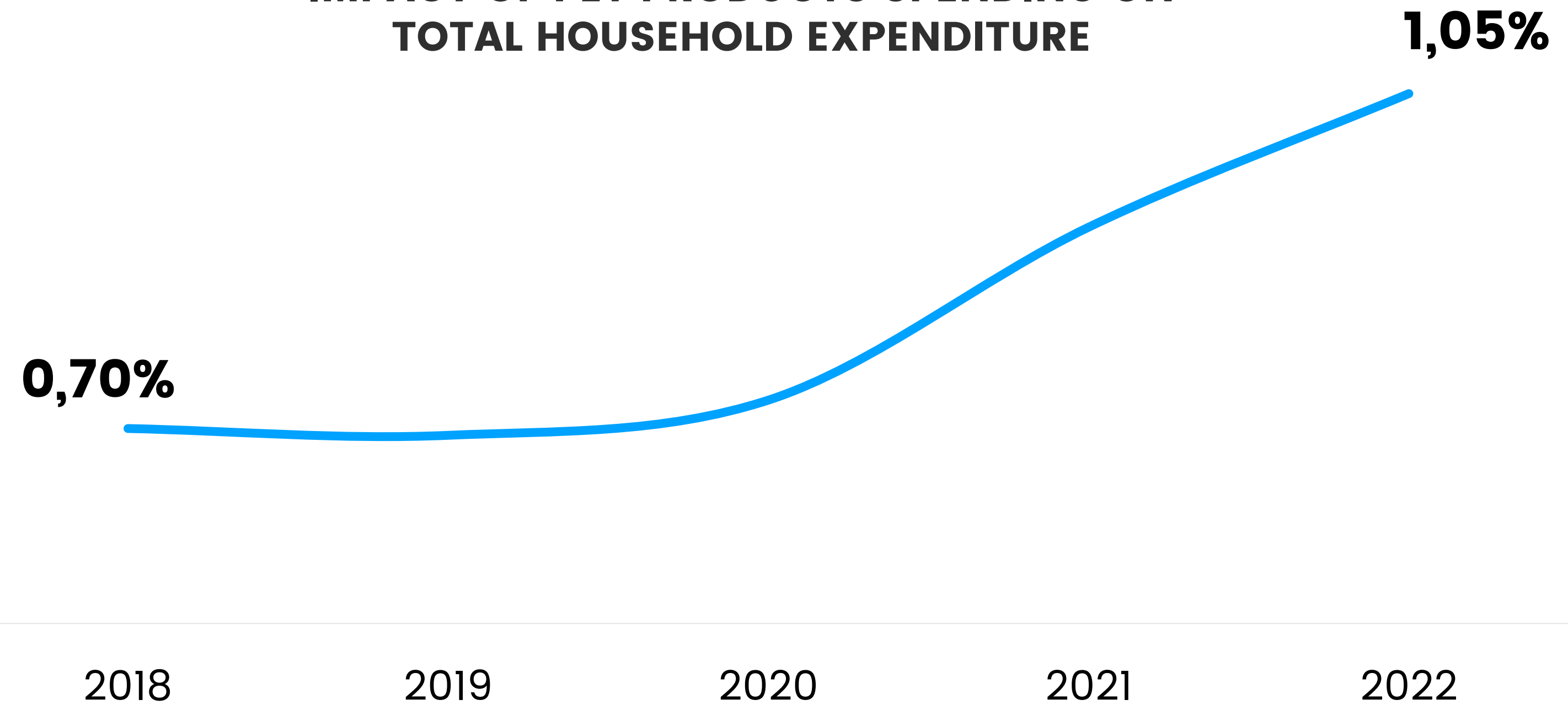
# 6.8

€ Billions

Expenditure by Italian households on their pets (in 2022)

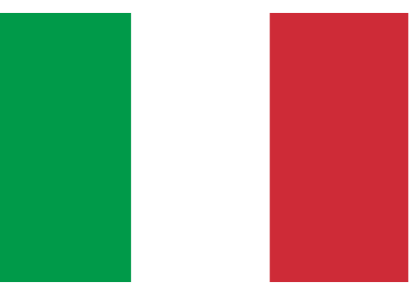
The recorded incidence of pet expenditure on household consumption increased by almost **35 bps** between 2018 and 2022.

## IMPACT OF PET PRODUCTS SPENDING ON TOTAL HOUSEHOLD EXPENDITURE



Source: Nomisma analysis on Istat data.  
Note: pet spending was compared to the consumption expenditure of Italian households net of food expenses.

# The pet accessories segment



**6.8**

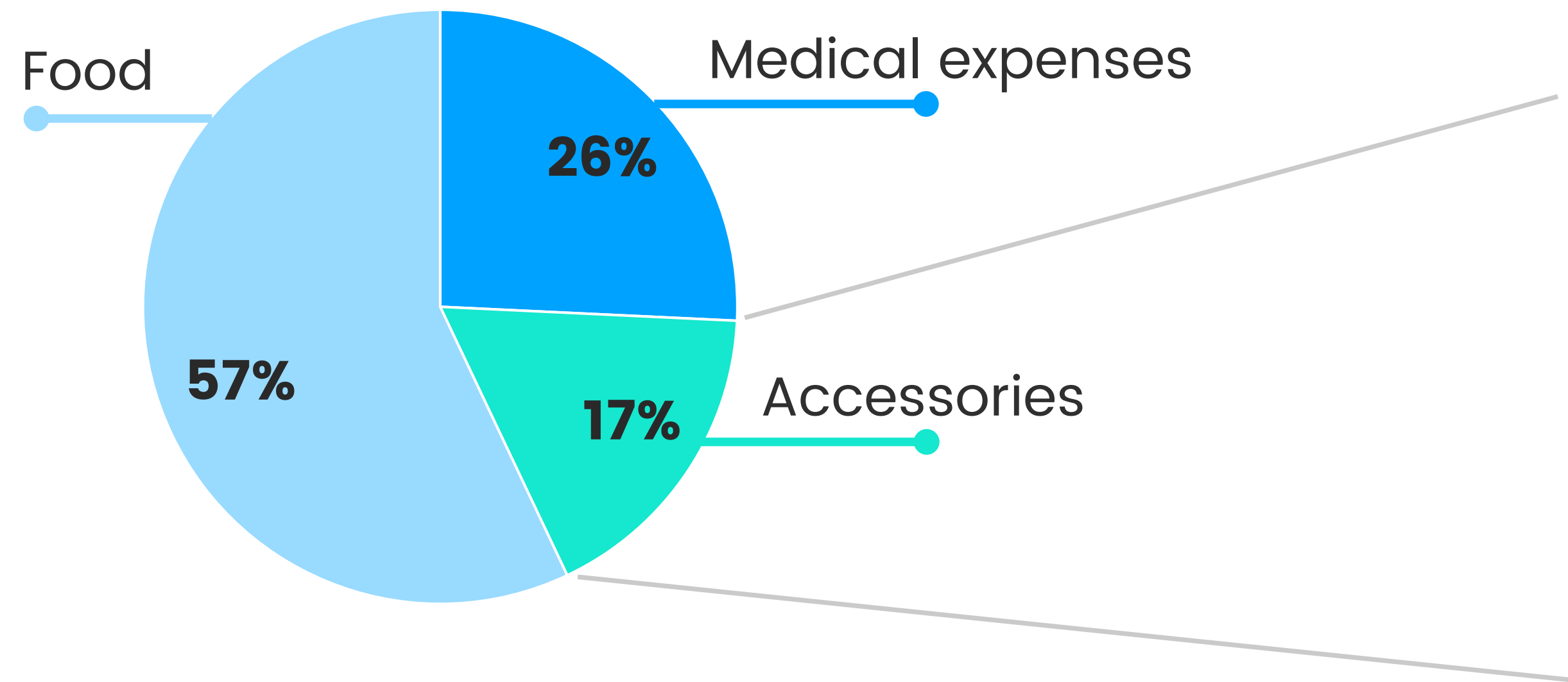
€ Billions

Expenditure by Italian households on their pets (in 2022)

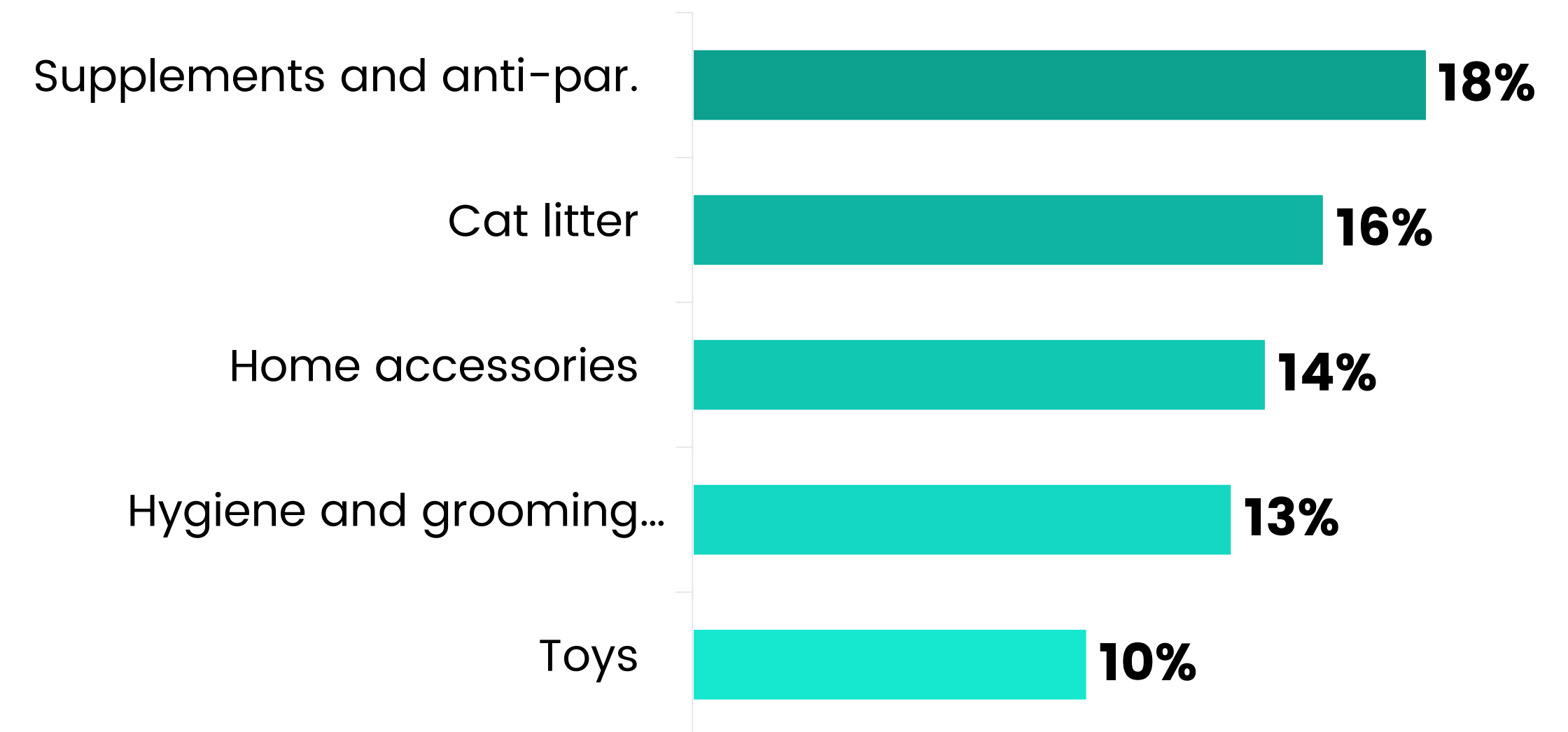
**1.2**

€ Billions

Italian household expenditure on pet **accessories** (in 2022)



## COMPOSITION OF EXPENDITURE ON ACCESSORIES\* (top five expenditure categories)



\*Expenditure in the last 12 months. Expenditure categories not reported include transport accessories, leashes and muzzles, clothing and electronic equipment.

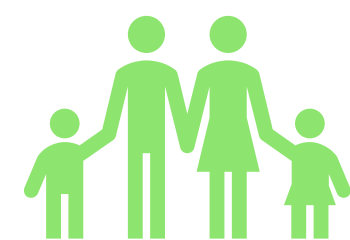
Source: Nomisma analysis on Istat data and Nomisma survey on pet owners.

# ITALIAN PET OWNER IDENTIKIT



**Age**  
**> 45 YEARS**

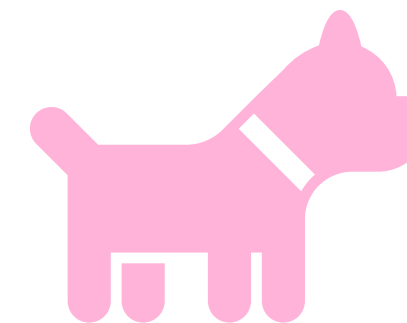
**47%**



**Household**  
**FAMILY WITH COHABITING CHILDREN**

**43%**

## Animal on which pet expenditure focuses



**DOG**

**52%**



Among those who have more than one pet: a **CAT** is the most frequent



**House type**  
**HOUSE WITH OUTDOOR SPACE**

**89%**

i.e. garden or balcony

## Lifestyle

**Conscientious and balanced**

**19%**

**Urban**

**10%**

**Global and curious**

**10%**

**Sustainable**

**10%**

**Active life**

**9%**

Percentages refer to the entire sample.

Source: Nomisma survey on Italian pet owners



# Spending habits

Pet owners who have purchased each product category in the last year

Calculation basis: total pet owners.

69%



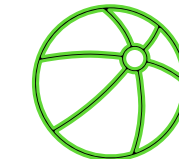
64%



63%



54%



38%



32%



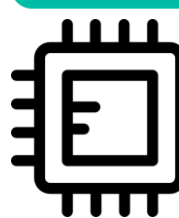
31%



24%



16%



In the last 12 months, how much did you spend on the following purchases for your pet?

Calculation basis: purchasers of each expenditure category.

Supplements & antipar. products

■ Up to €100 ■ From €101 to €300 ■ More than €300



Home accessories



Hygiene and grooming products



Toys



Leashes and muzzles



Cat litter\*



Transport accessories



Clothing



Electronic equipment

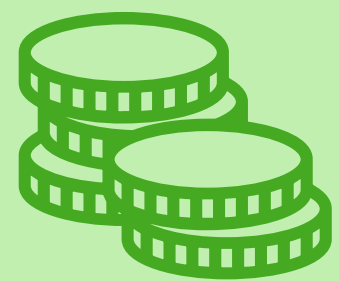


Source: Nomisma survey on Italian pet owners

\*Of plant and non-plant origin. The calculation basis includes pet owners who do not own cats.

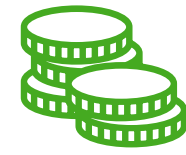
# "HIGH SPENDING" PET OWNERS

*i.e., they spend for their pet more than the sample average*



*Categories where the share of "high spenders" is higher than the sample average*

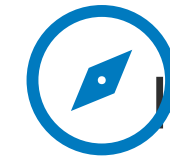
## Purchase choice drivers



High spender

**32%**  
*of pet owners interviewed*

## Lifestyle



Known manufacturer brand

**44%**

## Purchase channel of pet accessories



Luxury seekers

**42%**

## Household



Online specialised

**41%**

## Age



Family w/o cohabiting children

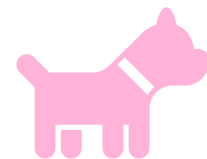
**39%**

## Pet on which expenditure is focused



30-45 years old

**37%**

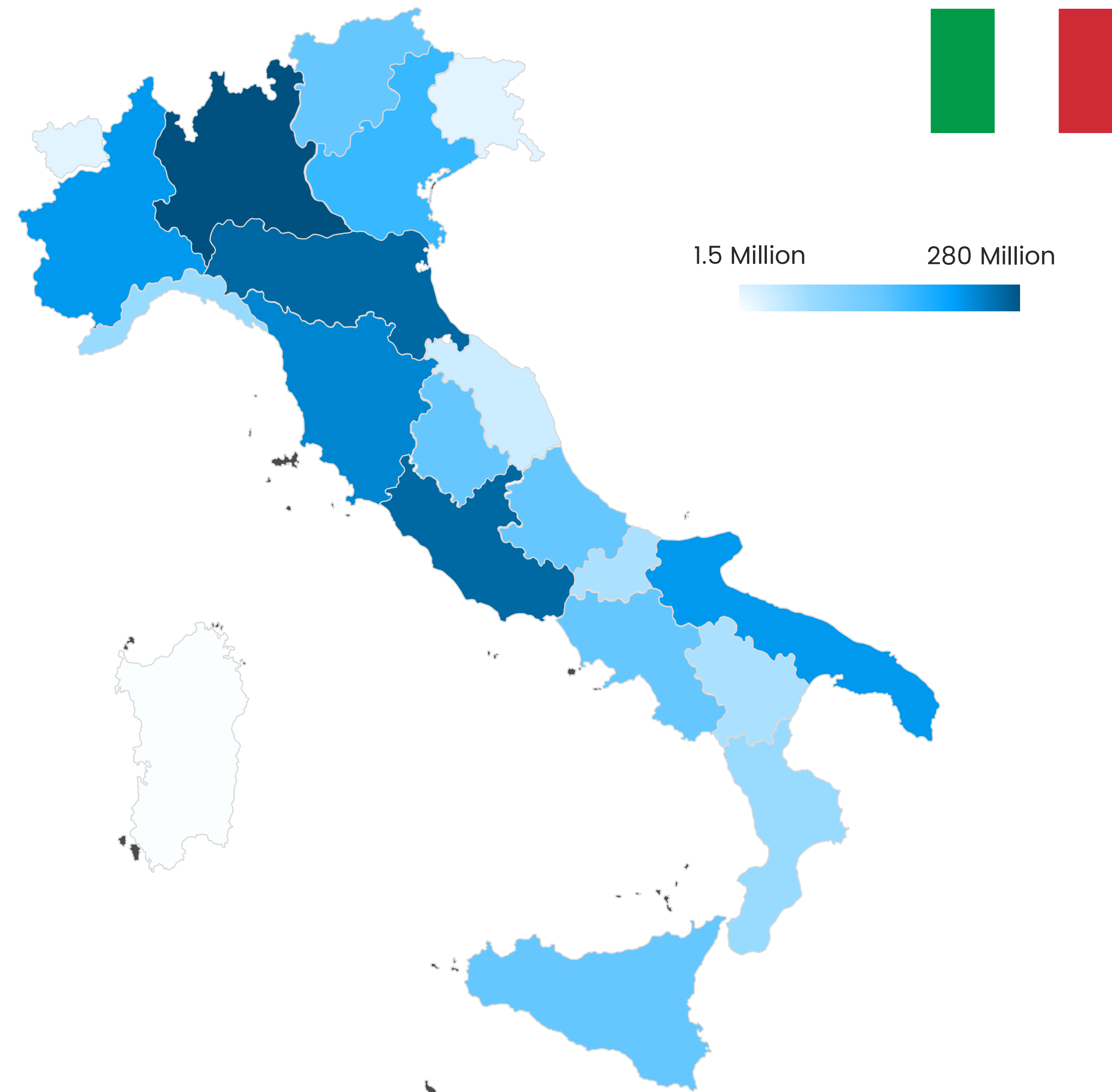


Dog

**37%**

Source: Nomisma survey on Italian pet owners

The regions of **Lombardy, Lazio, Emilia-Romagna, and Tuscany** account for more than 60% of the spending on pet accessories.



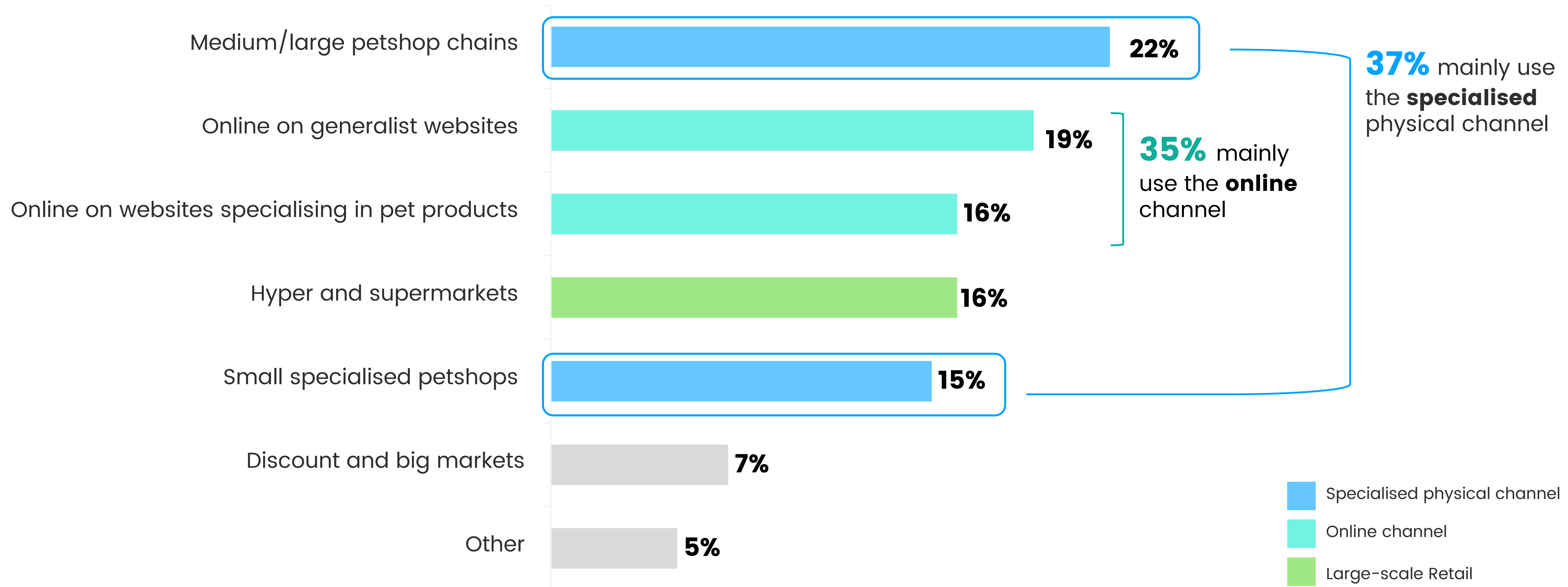
Source: Nomisma estimates on Istat data.

# Preference for the specialised channel and online



Where do you buy most of your pet accessories?

First answer in order of importance



Sample: total

Source: Nomisma survey on Italian pet owners

Note: accessories include toys, kennels, cages, clothing, transport accessories, hygiene products, supplements and electronic equipment.

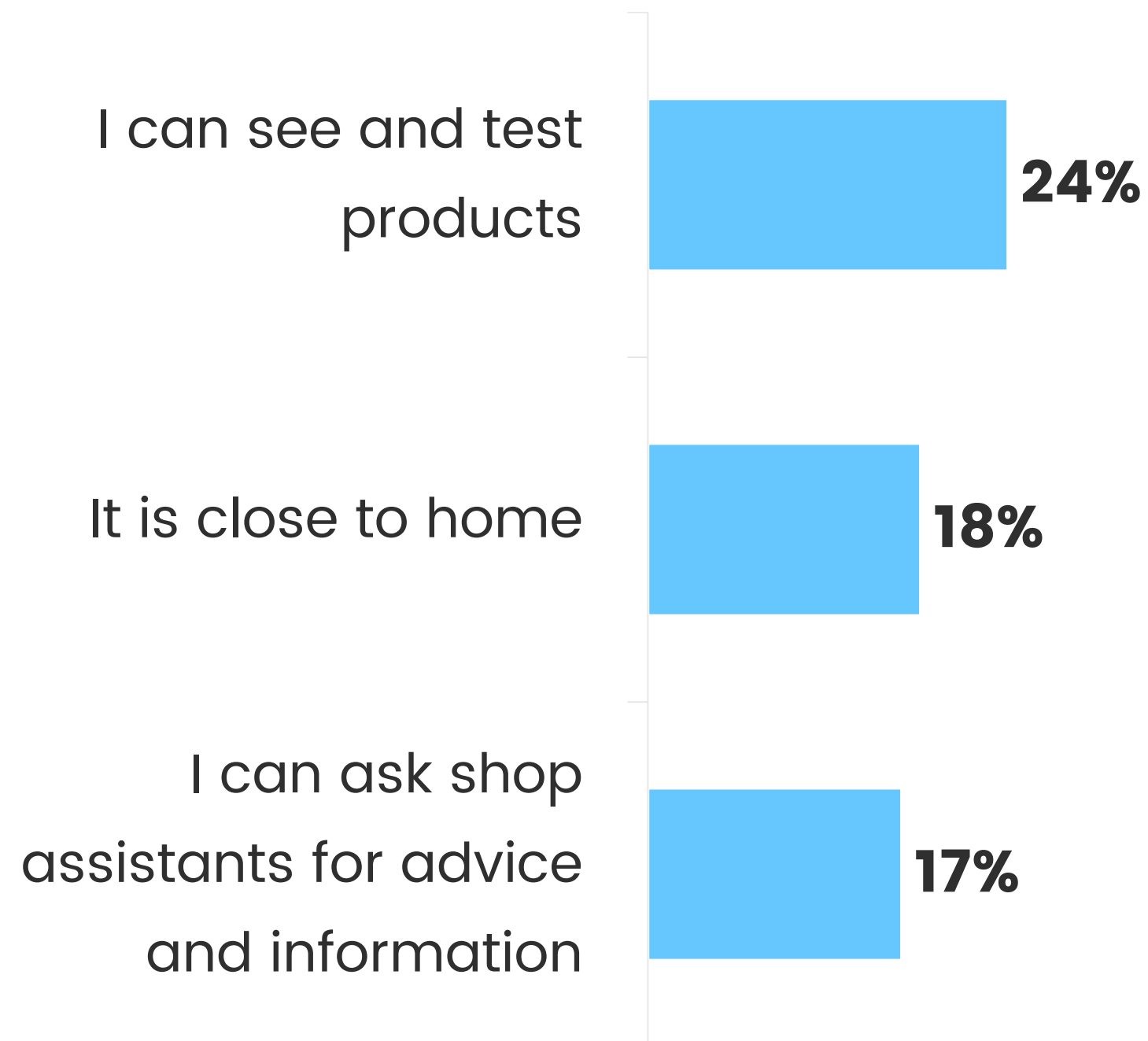
# User experience is the main advantage of offline channels

You buy accessories for your pet at ... because ...

*First answer in order of importance, the three most significant reasons were provided for each channel.*

## SPECIALISED SHOPS

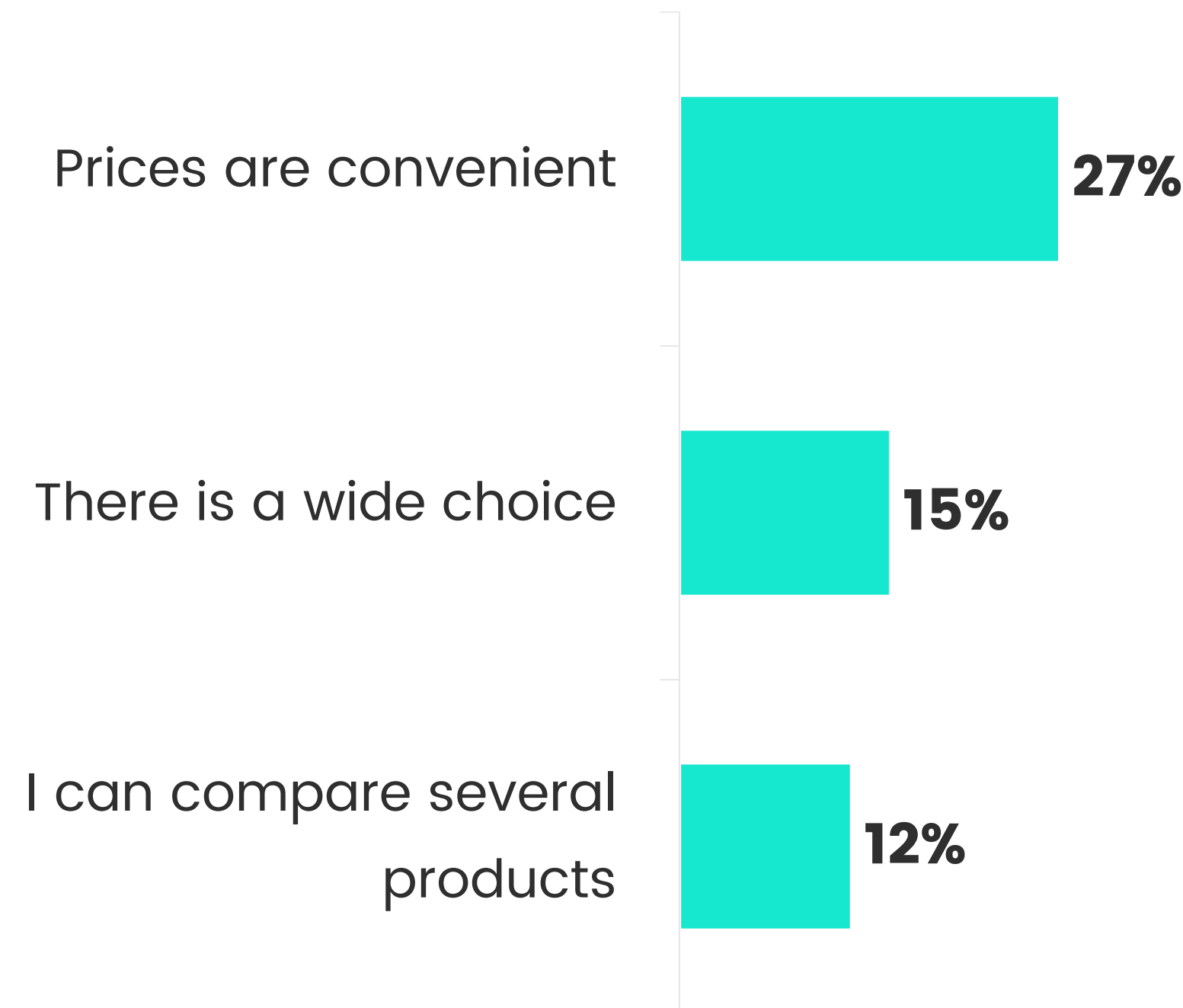
63% of the surveyed pet owners purchase through this channel



**Sample:** pet owners buying from specialised shops.

## ONLINE

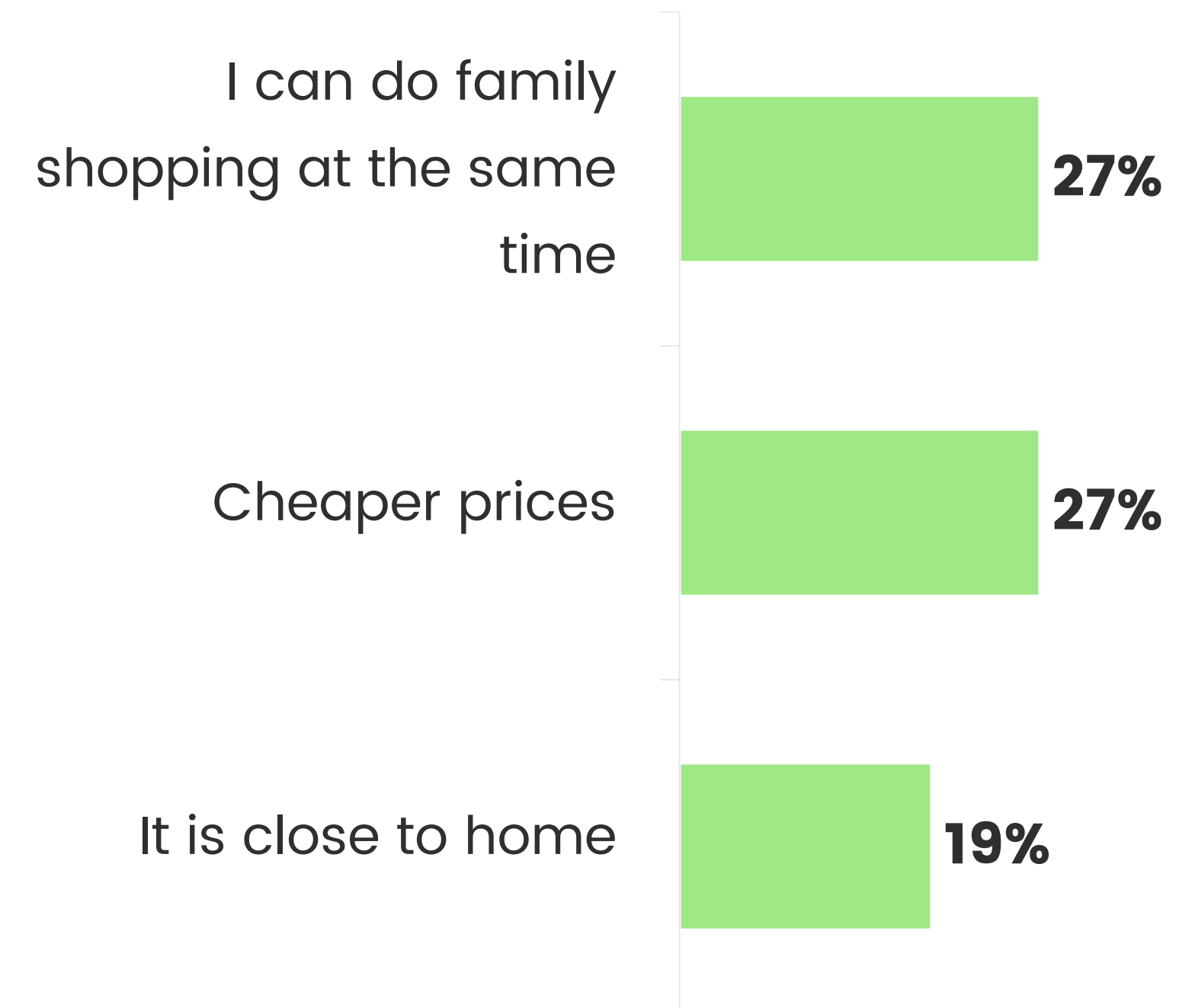
57% of the surveyed pet owners purchase through this channel



**Sample:** pet owners buying online.

## LARGE-SCALE RETAIL

35% of the surveyed pet owners purchase through this channel



**Sample:** pet owners buying from hyper and supermarkets.

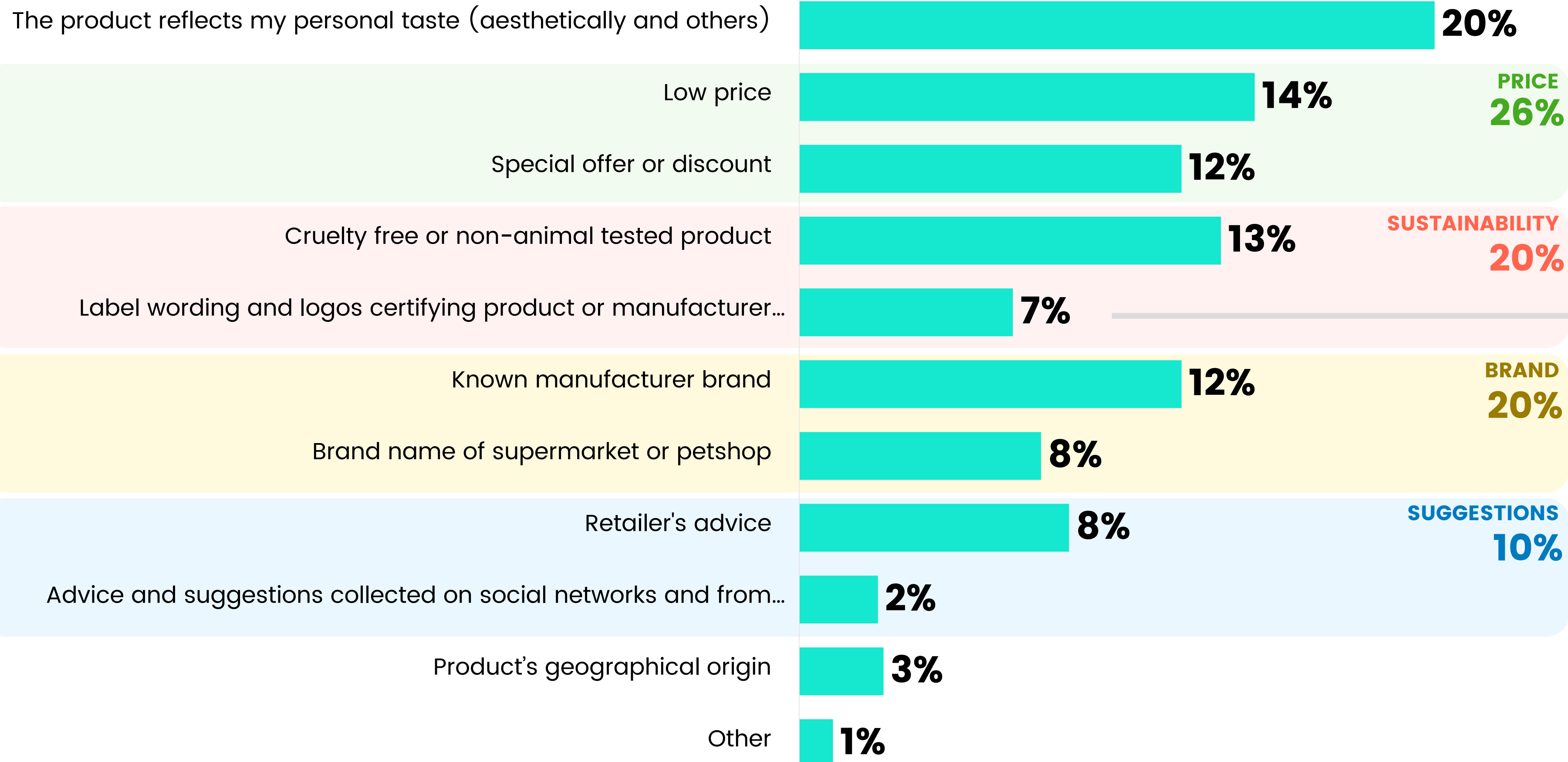
Source: Nomisma survey on Italian pet owners

Note: accessories include toys, kennels, cages, clothing, transport accessories, hygiene products, supplements and electronic equipment.

# Personal taste and price drive purchasing choices

## When buying accessories for your pet you choose based on ...

First answer in order of importance



Nevertheless...

**46%**

of pet owners will pay **more attention to sustainability** aspects in the next 2-3 years

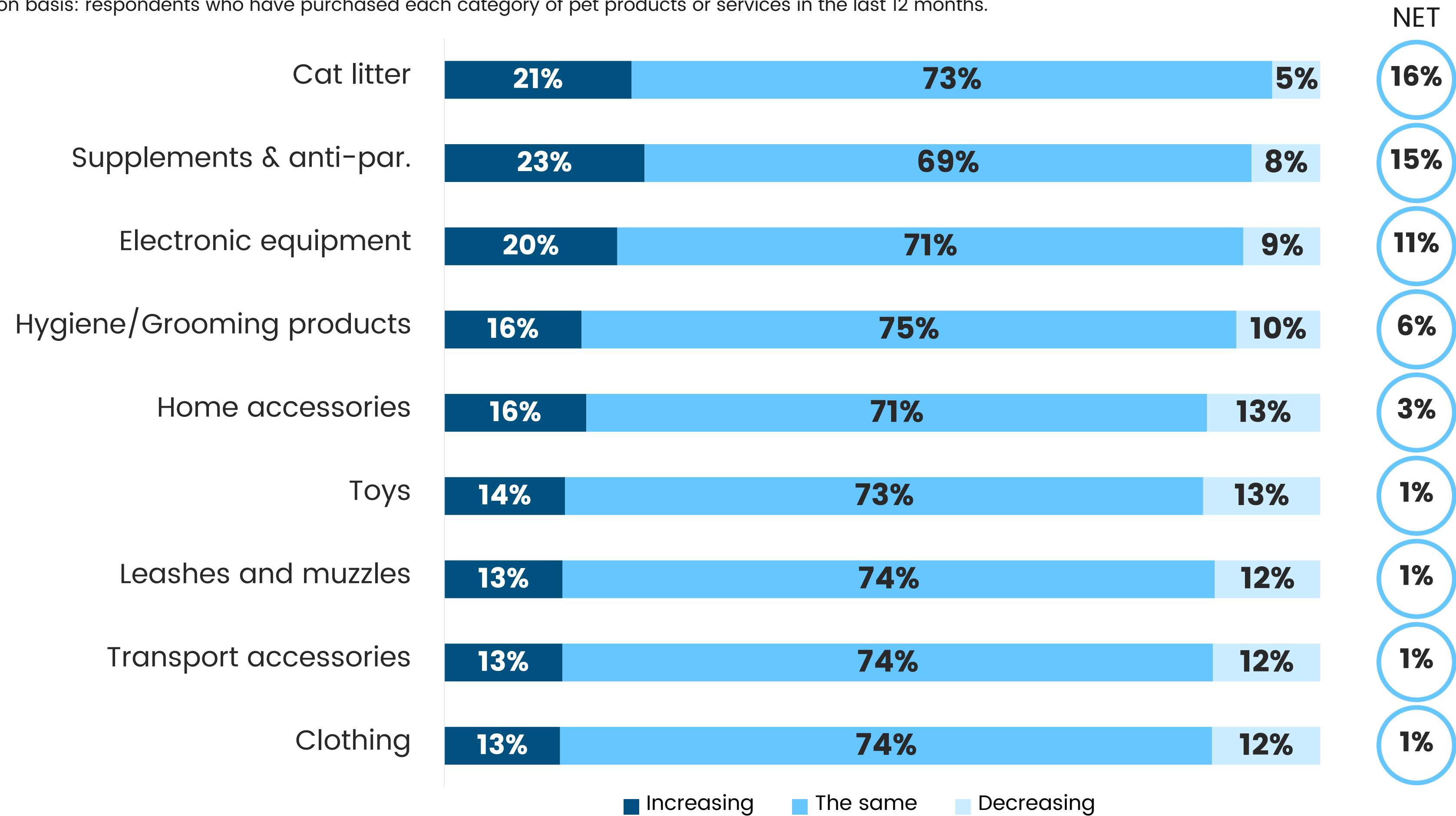
Source: Nomisma survey on Italian pet owners

Note: accessories include toys, kennels, cages, clothing, transport accessories, hygiene products, supplements and electronic equipment.

# Spending forecast: almost all categories growing

Looking ahead to the next 2-3 years, how much do you expect to spend on the following categories...?

Calculation basis: respondents who have purchased each category of pet products or services in the last 12 months.



Note: NET refers to the difference between those expecting an increase and those expecting a decrease in expenditure

Source: Nomisma survey on Italian pet owners

# The economic situation is favourable

## PURCHASING POWER RECOVERY

Percentage values, quarterly data



## EMPLOYMENT AT AN ALL-TIME HIGH

Percentage values, monthly data

Employment rate **61.9%**

Unemployment rate **7.5%**

## INFLATION TEMPORARILY UNDER CONTROL

Percentage values, monthly data

**1.2%**

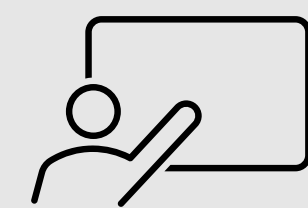
March 2024

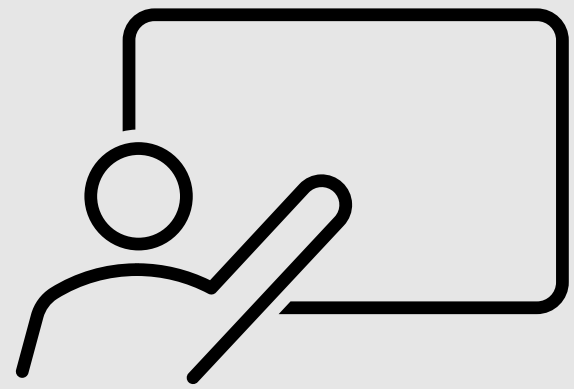
## POSSIBLE ITALIAN PET CARE MARKET EXPANSION

Source: Nomisma analysis on Istat data.



**THANK YOU**





PRESS CONFERENCE  
8 May, 2024

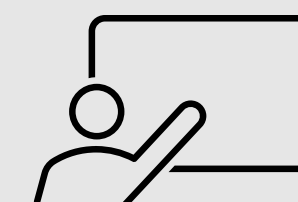
# Zoomark 2025: novelties & projects

**Pascale Sonvico**  
Show Office & Sales Manager



**ZOOMARK** 5–7  
May 2025

# TRENDS & GOALS



# TRENDS & GOALS

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The **domestic pet population is on the rise**, with pet owners increasingly attentive to their pets' health and needs, willing **to invest in premium, high-quality products** despite economic challenges and inflation.

The same trends can be detected throughout Europe, and in most of the rest of the world.

# TRENDS & GOALS

## Market Keywords:

Growth

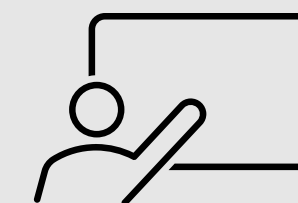
Awareness

Premium

## Bigger and bolder

**Zoomark**, with its winning combination of **culture and business**, has always been **an essential event for the pet market**.

Our international endeavours are part of our **large-scale strategy** to forge **partnerships** and **foster business** opportunities.

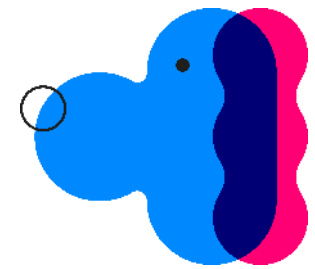


# TRENDS & GOALS

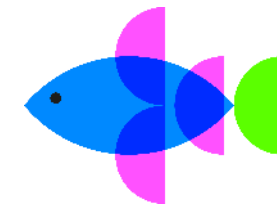
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## HUB of the future

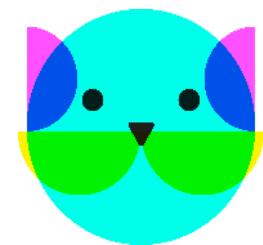
**Powerful platform for professional development and exchange**



Seminars, talks  
and round-tables



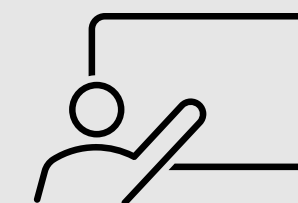
Networking opportunities



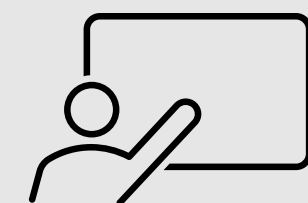
Market focuses



Inspiration



# SPECIAL AREAS





# SPECIAL AREAS



## Next 5.0

- The pet market into the **future**
- **Startups**
- Established companies leading **technological advancements**
- **High-tech solutions** for pets, owners, and the industry at large



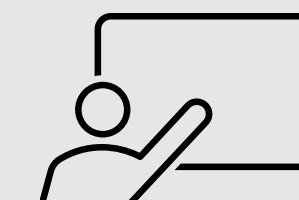
## Factory

- Pet industry **production and supply chain**
- **New hall 28**
- Raw materials suppliers, machinery, packaging, industry services



## Atelier

- **Pet fashion**
- **Design**
- **Beauty**



# SPECIAL AREAS

## What is coming back



### Pet Vision

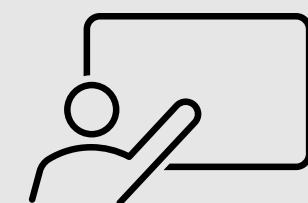
- Future trends sneak peak
- 500 new products in 2023



### Aqua Project

- Next-generation, design-focused fish and reptile tanks
- Captivating landscapes created by leading firms

# PARTNERSHIPS & COLLABORATIONS



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US Pavilion



British Pavilion



Chinese Pavilion



India Pavilion



Canada Pavilion



Czech Pavilion



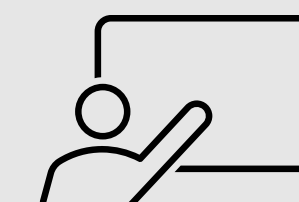
Brazil Pavilion



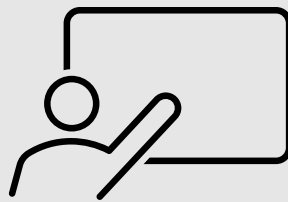
Greece Pavilion



Thailand Pavilion



# PARTNERSHIPS & COLLABORATIONS





Download the press kit!

**See you in Bologna, 5-7 May 2025!**

Thank you

