

# What to Expect for Dog and Cat Food at Zoomark

## Pet industry keeps growing

The pet care market continues to grow strong. According to Euromonitor, global pet care sales increased by 5.9% to USD197.6 billion from 2023 to 2024. The largest markets include North America and Europe, capturing more than 60% of commercially manufactured pet food worldwide.

## Recent developments

In the area of pet food, premiumisation and humanisation have been trends for years. Despite financial restrictions, pet owners seem to make household savings in areas outside of the pet area.

Humanisation leads dog and cat food trends to follow human food. With plant-based diets on the rise, pet owners may look for plant-based options for their pets. At the other end of the spectrum, some owners believe diets consisting of mainly raw meat are the only suitable option. Influencers, social media and online resources play an important role in driving decision making of pet owners for their own diets, and that of their pets.

One of the focus points for pet owners and pet food manufacturers alike is on

functional ingredients. Ingredients need to be in the recipe for a reason, otherwise they are easily classed as 'fillers' under online scrutiny. Pet food brands aiming to be in favor of similar online opinion may look to make meat protein the first element in the ingredient listing, due to the perceived health benefit for pets over, for example, cereals forming the main component.

Another point of differentiation between pet food brands is product type. Dry, extruded kibble and wet food continue to represent the majority of commercially produced complete pet food volumes. Variations to complete food formats include cold-pressed, frozen/fresh and gentle processed. In contrast, the area of snacks and treats allows more playful variation in formats as biscuits, training treats, liquid snacks, drops, or pillows.

## What is Zoomark?

Zoomark is a bi-annual, international trade show that takes place in Bologna, Italy in early May. This year is set to break its own records, estimating 1500 exhibitors including brands of pet food, accessories and care products, alongside suppliers



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of raw materials, machinery, packaging and services that make it all possible. This attracts close to 28,000 visitors. The Zoomark website reports about 90% of buyers comprise retail, distribution, trade, manufacturing and groomers. The remainder includes mass retailers, garden centers and veterinarians. With more than a third of all attendees being Italian, there is a strong focus on the Italian market.

## What does Zoomark offer?

While reports of other recent events showed disappointment in the lack of innovation, Zoomark is promising the latest inventions and future developments. These are to be showcased in the 'Pet Vision' area, organised by four trends: 'Value for money', 'Green transition', 'Brain & Health', and 'Mini Mania'. Also, young start-ups and newcomers can feed their creative ambitions with tech, industry trends and investment in the 'NEXT 5.0' area in hall 16. The themed 'Factory' area provides everything required for making pet food: machinery, packaging, raw materials and services. Aside from trade stands and meeting areas there are also lectures and seminars. Three days will not be enough to see all 10 halls, so here are the main things to look out for.

## What to look out for at Zoomark?

Squeezed household budgets cause pet owners to look sideways to alternative



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brands that may still be premium, but at a gentler price point. It will be interesting to see how different brands approach this when it comes to functional ingredients, as value for money can be enhanced both by using cheaper ingredient providing similar value, or by using ingredients at similar or even higher cost providing relatively more value. Similarly, a bigger-bang-for-buck can be attained by the end-consumer by buying similar quality products for a lower price, or by choosing a higher cost product providing relatively more value.

### Raw materials

Functional ingredients bring a benefit to the animal, and claims must be substantiated before they can be used for marketing purposes. A common approach is to use a specialist ingredient for a specific functional claim. There are, however, ingredients that have multiple functionalities. These multifunctional ingredients can allow for multiple claims, for example: eggshell membrane for joint and skin support, part-hydrolysed yeast for immunity and palatability, or citrus fiber for stool consistency and lowering energy content suitable for obese pets. The number of studies on health impact of insect protein is rising, perhaps leading to some launches with few other ingredients but still an array of claims. Irrespective of the number of claims that are made,

the rule book stipulates that the claim must be verifiable before the product is brought on the market.

There may be a jack-of-all-trades ingredient that meets all functional claims a brand is looking to make. This means the warehouse needs to store fewer materials, which means fewer supply lines, lowering risk of supply chain disruptions. Particularly if this material can be sourced locally this offers security alongside reduction of food miles. Whether multifunctional ingredients will indeed become of greater interest to brands remains to be seen, but there are advantages to considering this other than solely making claims.

Raw material suppliers with ingredients of which the claims have been substantiated in the target animal would have a head start over those with research in agricultural animals or humans. This research & development requires its return in market demand to warrant investment. Equally, suppliers need to be able to scale supply if demand increases, while mitigating risk of adulteration. A multifunctional ingredient with low inclusion and high value will be unattractive if the minimum order quantity is high, placing another requirement on the supplier. Established suppliers into pet food will be familiar with these demands, while this will be something to look out for with new suppliers.

### Finished products

Humanisation leads to owners having dietary considerations for their pet outside of, for example, cost or ease of feeding. Their own ethical values can draw them to polarised choices of plant-based versus high-meat diets. Emotional bonding can drive the choice of product formats from prioritised ease of feeding to food preparation at home.

### Premiumisation

Premiumisation has been a key word in describing pet food trends for years. Protein sources are generally costly ingredients used at high inclusions. Brands targeting consumers looking for high protein contents, specifically from meat, therefore must contend with the accompanying costs. It will be interesting to assess whether protein content of premium brands will come down a little.

Plant-based alternatives and meat replacer textured protein address the ideals for another part of the market. These ingredients come at a higher cost, but perhaps we can witness some product development in this space for a niche market segment.

Given the focus on functionality, perhaps more launches will make claims on nutrient density. Smaller portions will need to be fed with a higher energy content, most easily achieved by adding more fat. More focus may be placed on the specific fatty acid composition with a specific link to brain health, which fits in one of the four trends at Zoomark's 'Pet Vision' area.

Gut health and natural ingredients remain of great importance for the end consumers. Anything pro-, pre- and postbiotics have gained public acceptance and the number of product launches is expected to be higher than previous years.

### Product formats

Product cost may still increase when product value increases significantly in humanisation and emotional bonding. This may include balanced home-cook meals, or ready meals and take-away equivalents. Main innovations in this space are to be expected in the Next 5.0 startup area. Startups and investors will deliberate whether the access to this niche market is worth the risks associated with producing such a product. The eye will be on who the jury nominates and declares the winner of the startup challenge.

Established brands may be looking at more combinations of existing products. Perhaps combine a super-premium meal with a mid-premium supplement, establishing a higher engagement in meal preparation for a lower price. The same could be achieved by feeding different products for breakfast and dinner, or Sunday brunch, creating a space for owners to try out yoghurt sticks or other bonding products. 🐾

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