



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



ZOOMARK 2019
INTERNATIONAL

an event by
Bologna Fiere

12th edition of the ASSALCO-Zoomark Report

Positive signs from the Italian pet food market: in excess of 2 billion euros, +1.5%

6 May 2019 – More than 60 million pets: around 30 million fish, 12.8 million birds, 7.3 million cats, 7 million dogs, 1.8 million small mammals, 1.3 million reptiles and a market worth more than 2 billion euros.

These are the figures revealed in the 12th edition of the ASSALCO-Zoomark Report, the annual overview of the pet market, presented today at the inauguration of Zoomark International 2019 – the international B2B event for products and equipment for pets organised by BolognaFiere, which will be taking place at the Bologna Exhibition Centre until 9 May.

The Report compiled by ASSALCO (National Association of Producers of Pet Food and Pet Care) for Zoomark International, with the contribution of IRI Information Resources, the Doxa market research firm and the National Association of Italian Veterinary Doctors (ANMVI).

CAT FOOD AND DOG FOOD. THE MARKET IS GROWING AT A FASTER RATE THAN THAT OF PACKAGED MASS CONSUMPTION GOODS

The market for cat and dog food products in 2019 reached a business volume of 2,082 million euros, recording growth of 1.5% compared with the previous year, developing at a greater rate of development greater than packaged mass consumption goods (0.01% in 2018). The market for cat food represents 52.3% of the total and is worth 1,089 million euros, while that the market for dog food is worth 993 million euros. In total 565,136 tonnes were sold (-1.2% compared with the previous year), to consumers whose purchasing choices are increasingly prioritising premium products and smaller formats.

Over the period 2015-2018 the market developed at an overall annual rate of +2.7% (while the growth rate for packaged mass consumption goods was 1.2%).

SEGMENTS: INCREASES FOR DRY FOOD AND SNACKS

All the main segments (wet, Dry, snack& treat) of dog food products recorded trends of either positive growth or remained in line with the performance of the last year. Wet foods, with revenues in line with those of last year, continued to be the most important segment (worth 48.1% of the total market). The segment of dry foods, however, recorded growth of 2.5% in revenues for a total of 900 million euros. Functional snacks (for example those developed to safeguard oral hygiene) continued to experience dynamic growth (+5.4% in value).

FOOD PRODUCTS FOR OTHER PETS: BIRDS AND RODENTS ARE THE MAIN SEGMENTS

In the retail sector the market for food for other pets recorded revenues of around 13.4 million euros, confirming the upward trend already seen in recent years. Food for birds (37.8%) and rodents (29.8%) were the main segments followed by food for turtles (15%) and fish (16.9%).

ACCESSORIES: LITTER PRODUCTS AND ANTI-PARASITE PRODUCTS

The market for **accessories for pet care and day-to-day pet management** (hygiene products, toys, leads, pet beds, bowls, aviaries, aquaria, turtle tanks and various equipment) which is worth around 71.3 million euros, in 2018 saw stable sales and a slight increase in revenues of 1.2%. Of particular note was the growth in the segment of anti-parasite products (+5.9% in value compared with 2017).

The sector of cat litter products, seen on its own, in 2018 recorded a business volume of 72.3 million euros, an increase of +6.2% compared with the previous year.



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Gianmarco Ferrari, President of Assalco

"The positive trend continued also for the year 2018. The market for pet food and pet accessories has been able to interpret – with an adequate offer of products – the requirements of pets and their owners, the purchasers, who are increasingly discerning and responsible when it comes to taking care of their pets. Concerning nutrition, they choose to trust industrial pet foods, seen as practical and safe and capable of ensuring a complete and balanced diet. At the same time, for accessories, pet care and day-to-day pet management, consumers appear to prefer innovative products."

Gianpiero Calzolari, President of BolognaFiere

"We have witnessed, through Zoomark International, the evolution and constant growth of the market for pet products and services. The attention that we reserve for the care and wellbeing of our pets finds an exhaustive response in the offer from companies in the sector. Innovation, attention to quality, raw materials, and nutritional requirements are some of the areas that highlight the commitment of companies in the sector that BolognaFiere, with targeted initiatives, is supporting in the identification of business strategies and development opportunities in emerging markets."

For a more detailed examination, further information and all of the specific market data, the complete ASSALCO-Zoomark Report 2019 will be available on the website www.assalco.it and on the website www.zoomark.it.

NOTE: Full details of the sources can be found in the Report itself.

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