



# ASSALCO

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



## ZOOMARK

an event by



# 18th edition 2025 ASSALCO – ZOOMARK REPORT

Pet food and pet care  
The changing role of pets in society:  
relationships, integration and rights.

SUMMARY

with contributions from



Circana.



ASSOCIAZIONE NAZIONALE MEDICI VETERINARI ITALIANI



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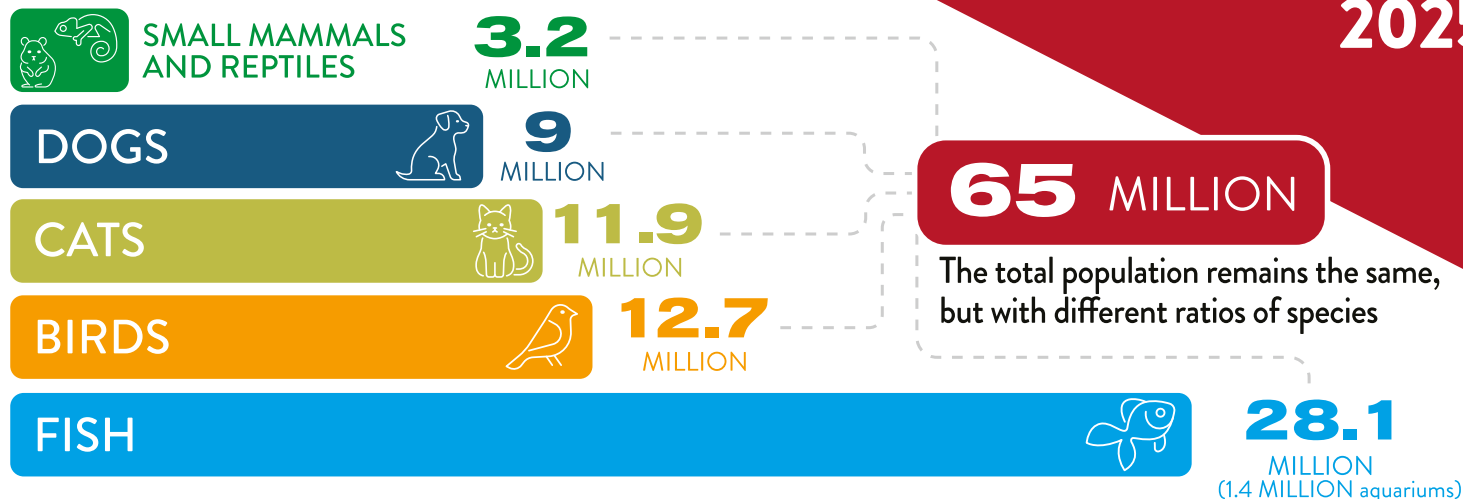
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## MARKET AREA



# PET POPULATION IN ITALY IN 2024

# ASSALCO ZOOMARK REPORT 2025



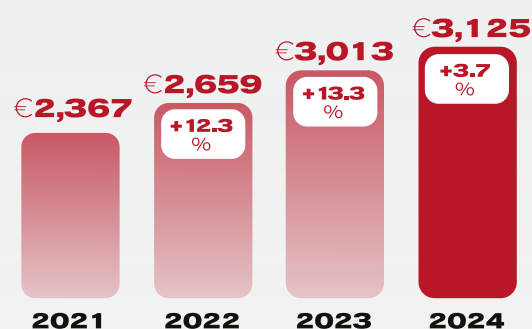
## THE MARKET IN ITALY IN 2024

### FOOD PRODUCTS DOG AND CAT

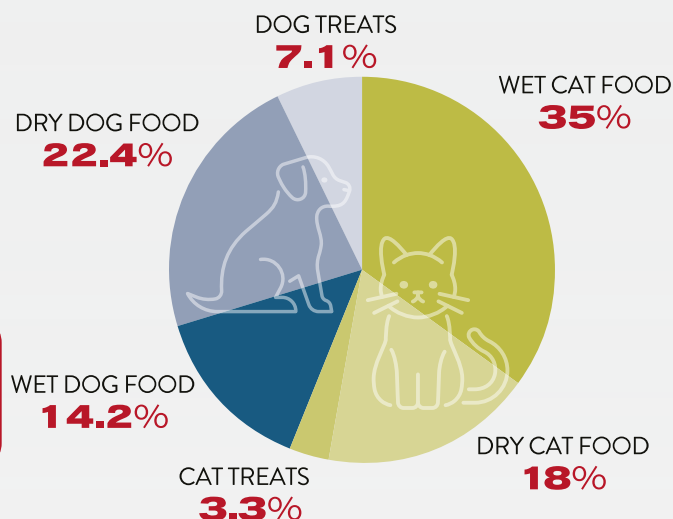
Value in MILLION euro

Grocery + Specialized retail (Traditional + Chains + supermarket petshops)

**€ 3,125 MILLION**



**CAGR**  
Average growth rate  
2021-2024  
**9.8%**  
in value

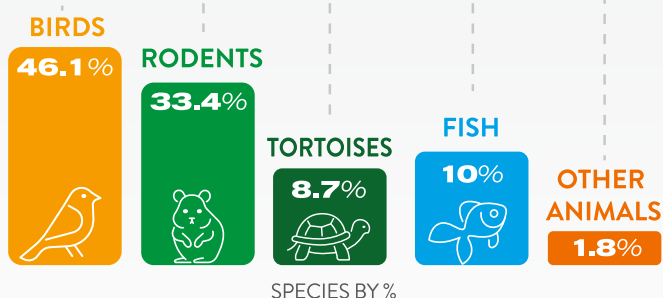


SOURCE: CIRCANA

## FOOD FOR SMALL COMPANION ANIMALS:

THE MARKET IN ITALY IN 2024 (LARGE-SCALE RETAIL)

**€13.4 MILLION**

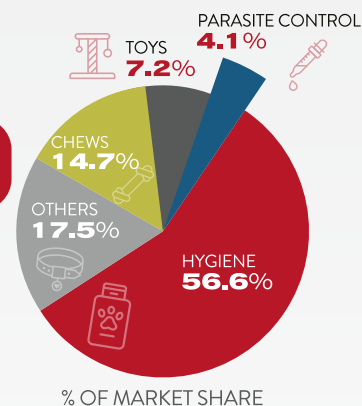


## ACCESSORIES

THE MARKET IN ITALY IN 2024

**€83.7 MILLION**

**SPECIALISED RETAIL**  
Trend in parasite products  
**+10.7%** By value  
**+6.8%** By unit



## CAT LITTER

MARKET IN ITALY  
IN 2024  
(LARGE-SCALE RETAIL)

**€102.5 MILLION**

**+2.5% vs 2023**

**Notes on Pet population and market infographic**  
Large-scale retail: Hypermarkets + Supermarkets + Small ind. retailers: Grocery: LSR+ Discount + traditional retail

Petshop chains: l'Isola dei Tesori, Croce Azzurra, Arca di Noè, Italpet, Zoo Megastore, Agrizoo2. Arcaplanet, Fauna Food, Petmark and Zoomarket are not included in Circana data.

Supermarket Petshops: Shops selling pet food and pet products belonging to a network of retail outlets that are owned by a supermarket chain.



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**Bologna Fiere Group**



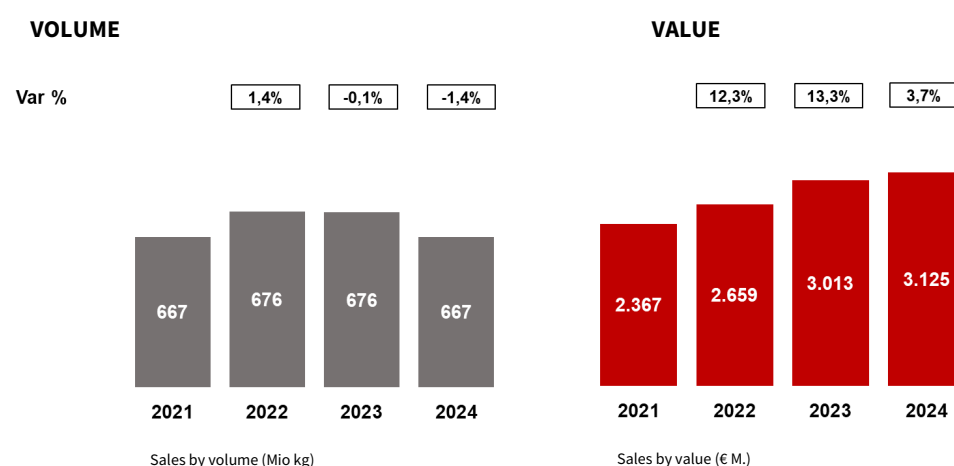


## THE MARKET FOR PET FOOD AND PRODUCTS: SIZE AND TRENDS<sup>1</sup>

In 2024, the market for Consumer Packaged Goods<sup>2</sup> in Italy – namely food products for human use, products for pets, household and personal care products - saw a positive trend with growth of 2.1% in value compared to 2023, driven once again mainly by the inflationary push that continued throughout 2024. If we analyse the trend in volume sales<sup>3</sup>, Consumer Packaged Goods grew by 1.6%, due to shoppers having less purchasing power. This figure comes from the total of the channels Hypermarkets, Supermarkets, Small self service shops, Household and Personal Care Shops, Discount supermarkets and Online.

One interesting element is the increase in the use of promotions (with a 1.3% increase in sales through promotions) spread across all the main channels.

Let's take a look at the pet food and pet care market in a year which brought further uncertainty.



2025 Assalco – Zoomark Report Source: Circana - 52 weeks to 29th December 2024

In 2024, the market for **food products for dogs and cats** in Italy – in the Grocery and Specialised retail channels – had a **turnover of over € 3.1 bn**, and **sold 666,504 tons** of product.<sup>4</sup> The market for cat and dog food continued to grow, albeit with different dynamics compared to the previous year. The price increases observed in 2023 slowed down, yet there is an important variable to take into account when interpreting market trends: value sales showed a smaller increase than in the past (+3.7%), while volume sales were down slightly, realigned with 2021 figures.

Dog and cat food:  
growth in  
revenue (+3.7%)  
with volumes in  
line with 2021

Last year's figures for value sales of cat and dog food reflect a positive medium-term trend, with an average growth rate (**CAGR**)<sup>5</sup> **of +9.8% in value sales from 2021 to 2024**, taking the market from €2.4 billion in 2021 to €3.1 billion in 2024.

Observing how the market has evolved over the last decade, sales by value have increased steadily at a higher average rate than sales by volume. The increase in the turnover of the pet food market is closely linked to the demographic changes in Italian households, which are getting smaller and older. Over the years, this has led to more attention being paid to pets, translating into an increasing focus on premium products.

<sup>1</sup> The figures on Dog and Cat food regard the Grocery + specialised retail channels. The Grocery channel: Hypermarkets, Supermarkets, small self-service shops up to 100sqm, Discount supermarkets and Traditional stores; Specialised retail: Traditional Pet shops, Pet shop chains and Supermarket Pet shops.

The data regarding food for other animals, cat litter products and accessories regard the large-scale retail sector (hypermarkets, supermarkets and independent retailers up to 100 sqm).

<sup>2</sup> Packaged Consumer Goods. 2024: 52 weeks ending on 29th December 2024.

<sup>3</sup> Calculation of volume = Values at constant prices

<sup>4</sup> Year ending 29th December 2024.

<sup>5</sup> CAGR - Compound Average Growth Rate

Another key factor is the **ever-increasing attention to the well-being of companion animals**: pet owners are conscious of the importance of proper nutrition for their pets, and the market is responding with more "customised" products created to suit different needs (age, breed, health conditions).

To sum up, despite continuing inflation and economic uncertainties caused by the increase in the cost of energy and some raw materials, as well as a general slowdown in growth, the pet food market remains a resilient sector. In 2024, pet owners continued to invest in their pets' health and well-being, a demonstration of customer loyalty which makes this industry less vulnerable to external threats.

In 2024, in the overall market surveyed by Circana, all major segments of dog and cat food showed a positive trend in value compared to last year.

Tot Grocery+Specialised retail	Sales Value (M. Euro)	% Share of Value	% change vs 2023
<b>Tot. Dog and Cat Food</b>	<b>3,125</b>	<b>100</b>	<b>3.7 %</b>
<b>Cat</b>	<b>1,757.9</b>	<b>56.3</b>	<b>5 %</b>
Wet cat food	1,093.7	35	5.3%
Dry cat food	561.7	18	3.6%
Cat treats	102.5	3.3	10.2%
<b>Dog</b>	<b>1,367.1</b>	<b>43.7</b>	<b>2.1%</b>
Wet dog food	444.8	14.2	1.9%
Dry dog food	699	22.4	2.3%
Dog treats	223.3	7.1	1.7%

2025 Assalco – Zoomark Report Source: Circana - 52 weeks to 29th December 2024

Cat food accounts for more than 56% of the total market

Cat food continues to represent the main segment of the market, and its value share out of total sales was up (56.3% of the total pet food market).

In relation to the **total pet food market, wet foods** are the most important segment, with a turnover of € 1,538.5 million, translating to 49% of the market share.

Wet foods continue to be the biggest sector of the market.

In the year ending December 2024, sales of wet foods continued to grow, up by 4.3% in value with volumes remaining stable (325 million kg, on a par with 2023).

The **Grocery** channel, which generated 72.5% of sales (wet cat food 72.7% and wet dog food 71.9%) saw value rise by 3.2% while volumes remained basically stable (-0.3%). Within the wet food category, the main segment, wet cat food (35% of the value of dog and cat food) rose in turnover by 4.5% in the Grocery channel (+1.8 in

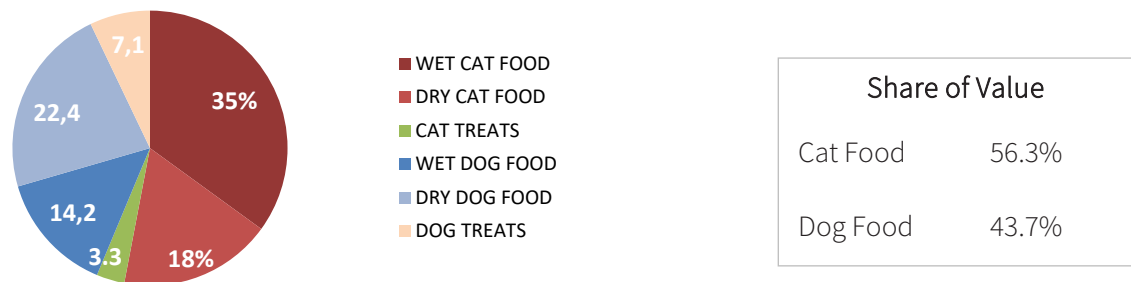
volume), a trend partially reflected in **Traditional Pet shops**, which saw a slight increase in turnover, up 3.2%, which was not however accompanied by a growth in volume. In the Grocery channel, wet dog food showed slight growth of 0.3% (while volume was down 2.8%). A similar trend was observed in Traditional Pet shops, which saw a growth of 3.6% in value and a drop of 3.4% in volume. In **Chains+Supermarket Pet shops** both segments continued to grow: double-digit growth was recorded for both Wet Dog food (+10.5%) and Wet Cat food (+14.1%), accompanied by an increase in demand above all for Wet Cat food (+10.7%), while Wet Dog food saw a lower growth rate (+3.4%).

Overall, the **total market for dry food** generated € 1,260.7 million (+13.4% in value and -1.1% in volume compared to the previous year) and had a 40.4% market share with the following breakdown: 22.4% dry dog food and 18% dry cat food.

In the year ending December 2024, the **Grocery** channel, which accounted for exactly half of total sales, only saw value increase in dry cat food (+2.6%), and demand did not go up. As for dry dog food, after seeing double-digit growth in 2023, this segment fell by 1% in value and the slowdown in sales by volume also continued (-6.5%). In the same period, specialised retailers also observed a similar scenario. In **Traditional Pet shops**, both segments grew in value (+2.3% dry dog, +3% dry cat), but with differing trends in terms of volume: while dry cat food recovered slightly (+2.6%) dry dog food fell by 3.7%. The **Pet shop Chains+Supermarket Pet shops** performed well and bucked the trend observed in Traditional Pet shops. After seeing double-digit growth in 2023, in 2024 their growth was slower, though still good (dry dog +8.6% in value and +3.4% in volume; dry cat +9.7% in value and +3.6% in volume). In terms of sales by channel, unlike wet food, which saw sales of dog and cat food aligned in the Grocery channel, dry dog food generated most of its sales in Traditional Pet shops (42.4% of sales) while dry cat food was to the fore in the Grocery channel (64% of sales).

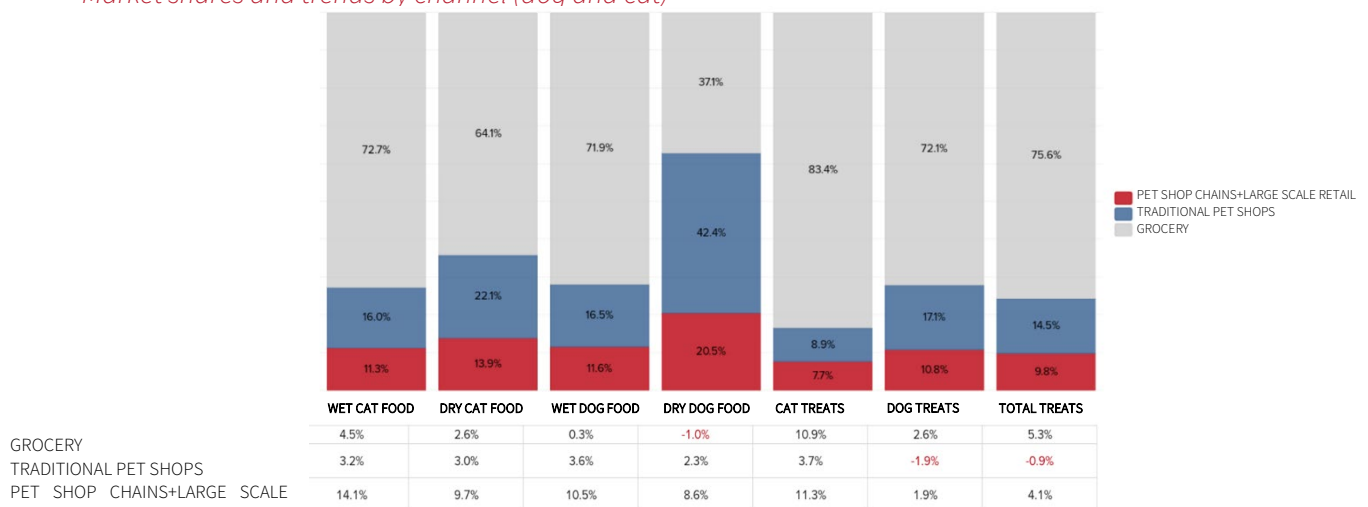
In the total **Italian market**, functional **snacks** and treats (products with a specific purpose such as dental hygiene, or flavour-focussed products usually given as a reward) for cats and dogs continue to show growth in value (+4.2%), while volume sales have decreased (-0.9%). The trends in treats and snacks are differentiated by species: cat treats saw double-digit growth in both value and volume, at +10.2% and +11.5% respectively, while dog snacks were up in value (+1.7%), but down in volume (-3.3%). In the **Grocery** channel, Cat Treats grew by +10.9% (+12.4% in volume) and dog treats by 2.6% (-1.7% in volume); specialised retail was led by **Chains+Supermarket pet shops** which saw double-digit growth in cat treats (+11.3%), with dog treats also growing but to a lesser extent (+1.9%). In the **Traditional** retail channel, dog treats continued to slow down in both value and volume, while cat treats grew by +3.7% in value, accompanied by an increase in demand (+5% in volume).

### Breakdown of the market for dog and cat food



2025 Assalco – Zoomark Report Source: Circana - 52 weeks to 29th December 2024 - value data

### Market shares and trends by channel (dog and cat)



2025 Assalco – Zoomark Report Source: Circana - 52 weeks to 29th December 2024 - value data

## FOODS FOR OTHER TYPES OF PETS

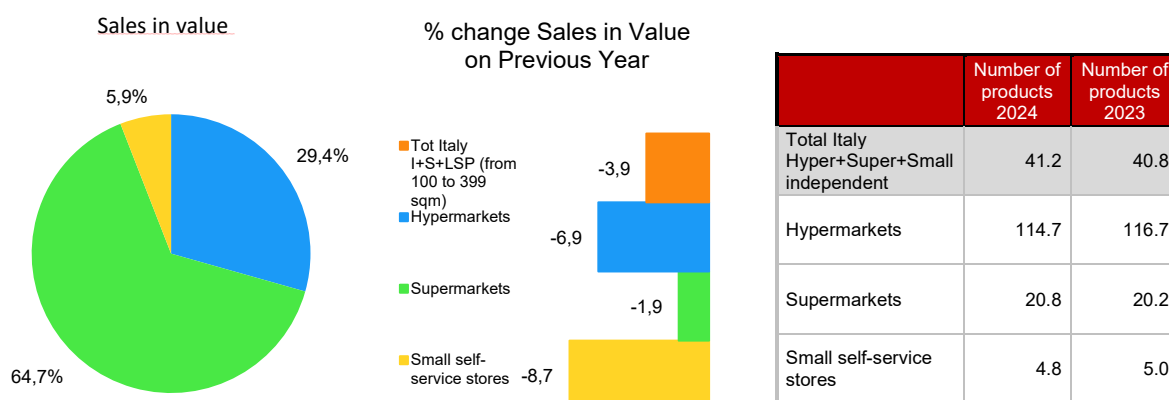
As in previous years, the segment of **food for other pets** was analysed in relation to purchases made in the three channels of large-scale retail; hypermarkets, supermarkets and small self-service stores.

In the year ending December 2024, the market for "food for other pets" made € 13.4 million, down 3.9% in value and 4.5% in volume.

	Year ending Dec '24	% change vs 2023
Sales in value (Euro)	13,437,945	-3.9
Sales by Volume	2,936,834	-4.5
Unit sales	5,139,426	-4.4

2025 Assalco – Zoomark Report - Source: Circana - 52 weeks to 29th December 2024

The market displayed similar negative trends across all channels, mainly led by hypermarkets, which account for more than 29% of revenues and fell by 6.9% in value and 5.9% in volume, while Supermarkets (64.7% of revenues) fell by almost 2% in value and 3.2% in volume. The segment of Small self-service stores represents almost 6% of the total and also saw a drop in both value and volume.



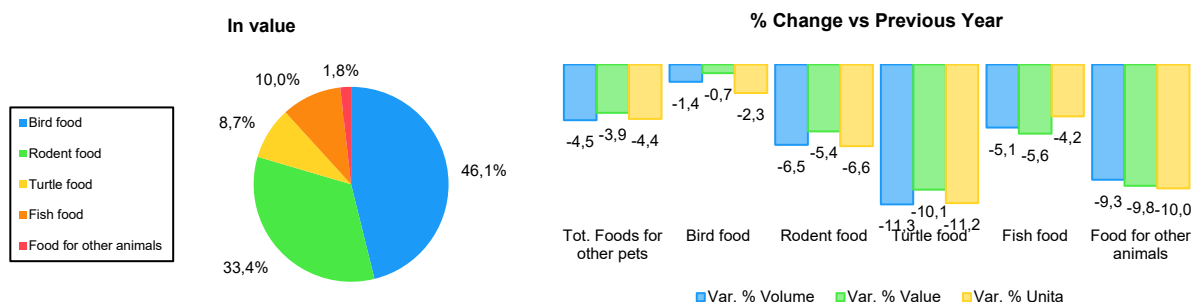
2025 Assalco – Zoomark Report - Source: Circana - 52 weeks to 29th December 2024

The main segment is bird food, which accounts for 46.1% of the value, and fell by 0.7% in value and 1.4% in volume. The second segment is rodent feed (33.4% of turnover), which also fell (-5.4% in value and -6.5% in volume) compared to last year.

Negative trends were also observed for fish and turtle/tortoise feed.

It should be noted that the data refer exclusively to large-scale retail and may not therefore reflect general trends. There are many products of this type available both in the specialised channel and online.

## Weighting of different foods by type of animal



2025 Assalco – Zoomark Report - Source: Circana - 52 weeks to 29th December 2024

## ACCESSORIES AND CAT LITTER

In the year ending December 2024, the market for **accessories** in large-scale retail saw a fall in turnover of 2.6% and units sold of 0.7%.

It should be noted that, as for the other categories, the accessories market (which includes hygiene products, toys and other accessories, i.e. leashes, beds, bowls, cages, aviaries, aquariums, turtle tanks and assorted items), the channel in question is large-scale retail, i.e. the sum of Hypermarkets, Supermarkets and Small self-service stores.

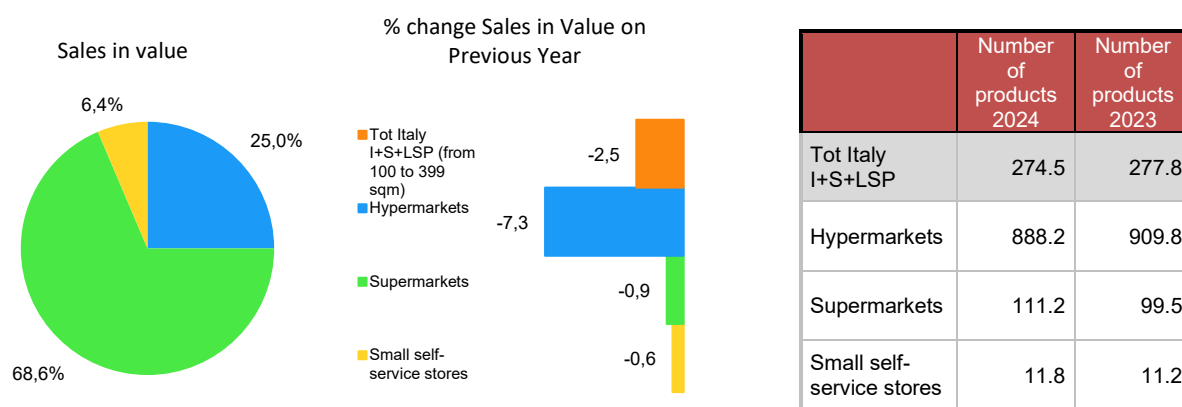
	Year Ending Dec 24	% change vs 2023
Sales in value (Euro)	83,691,594	-2.6
Unit sales	20,508,017	-0.7

2025 Assalco – Zoomark Report - Source: Circana - 52 weeks to 29th December 2024

The fall in revenues is largely due to a drop in Hypermarket sales (which account for 1/4 of total revenue and fell by 7.3%); Supermarkets (68.6% of revenues) also fell, but to a lesser extent (-0.9%); while Small Self-service stores (6.4% of revenues) was down once more (-0.6%).

Product assortment was rationalised, decreasing in both Hypermarkets and Supermarkets.

It should be noted that, as for the data for food for other animals, these figures refer exclusively to large-scale retail and may not therefore reflect general trends. Indeed, there are many products in the accessories category available both in the specialised channel and online.



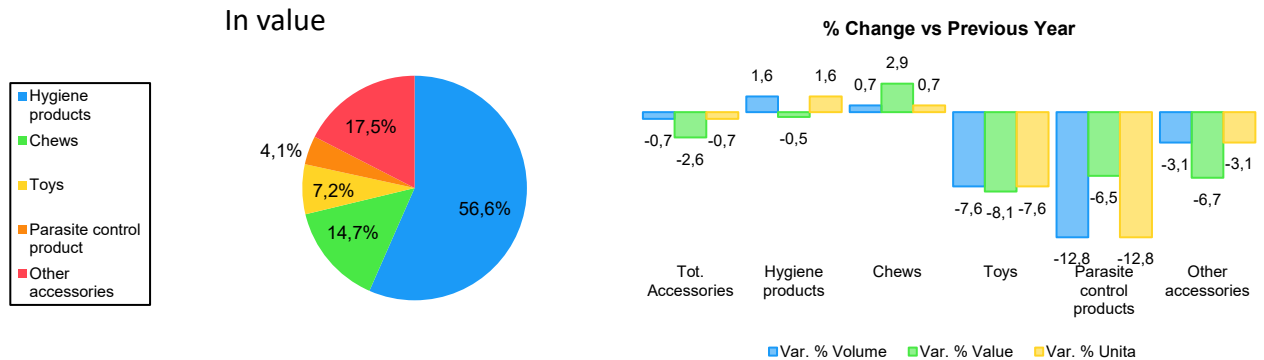
	Number of products 2024	Number of products 2023
Tot Italy I+S+LSP	274.5	277.8
Hypermarkets	888.2	909.8
Supermarkets	111.2	99.5
Small self-service stores	11.8	11.2

2025 Assalco – Zoomark Report - Source: Circana - 52 weeks to 29th December 2024

Hygiene products (pee pads, wipes, shampoos, brushes, deodorants - everything related to care and grooming) make up more than half of the total accessories market and saw growth of 1.6% by volume, while value was largely stable (-0.5%). The category of chews saw growth in both value (+2.9%) and volume (0.7%). Parasite control products, a category which has seen significant product innovation in the last few years, were down in both value and unit sales in large-scale retail, but in specialised retail (Chains+Supermarket Pet shops+Traditional) they were up 10.7% in value and 6.8% in unit sales.

The positive trend in hygiene products regarded volume alone. Parasite control products were on the up in specialised

#### Weighting of the various categories of accessories



2025 Assalco – Zoomark Report - Source: Circana - 52 weeks to 29th December 2024

#### Cat litter products

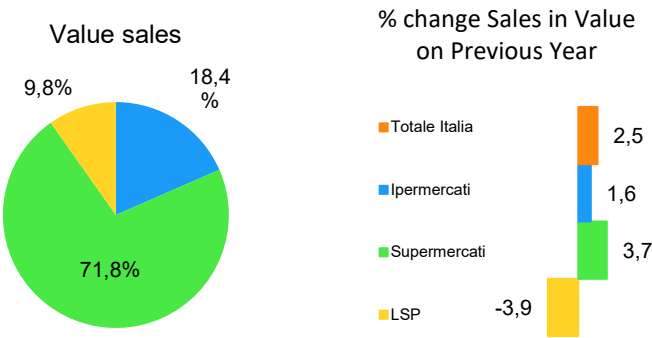
Although **cat litter products** can be classed as hygiene products, they are considered separately, as they represent the most important non-food segment in the large-scale retail channel; indeed, in the year ending December 2024 this segment was worth more than € 102 million.

	Year Ending Dec '24	% change vs 2023
Sales in value (Euro)	102,513,054	2.5
Sales by Volume	126,655,242	1.0
Unit sales	24,146,985	2.4

2025 Assalco – Zoomark Report Source: Circana - 52 weeks to 29th December 2024

In the year ending December 2024 the market grew in value by 2.5% and volume by 1%.

When it comes to the performance of the various channels, Supermarkets, which make up 71.8% of revenues, reported growth in both value (+3.7%) and volume (+2.1%). Hypermarkets also saw growth (+1.6% in value, but -1% in volume), while figures were down for small self-service stores (-3.9% in value and -3.2% in volume).

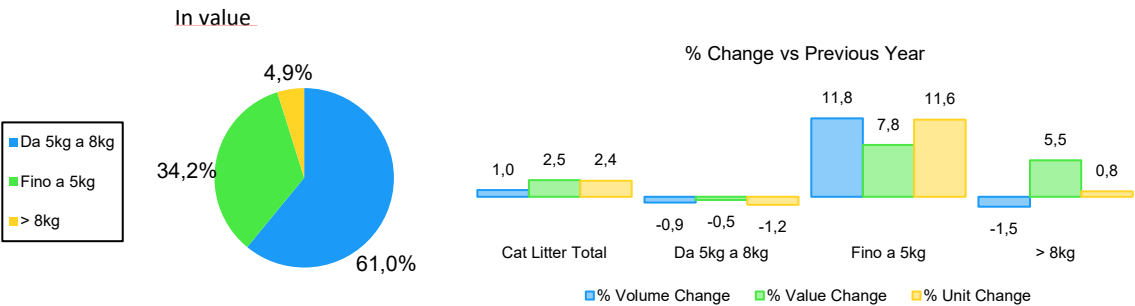


	Number of products 2024	Change in Number of products vs 2023
Tot. Ita. H+S+SSS	14.9	-0.2
Hypermarkets	31.6	0.3
Supermarkets	2.1	-0.4
Small self-service stores	5.5	-0.0

2025 Assalco – Zoomark Report - Source: Circana - 52 weeks to 29th December 2024

The best-selling format (61% value share) was the medium-size pack (5-8 kg), which fell slightly in value (0.5%). The "space-saving" format (up to 5 kg) continues to grow in popularity (+7.8% in value, +11.8% in volume), and accounts for more than a third of the entire market in value. This format represents a smaller spend, even though the larger format is better value for money. More moderate growth (+5.5% in value) was reported by the over 8 kg format, which makes up less than 5% of the market.

### Weighting of cat litter products



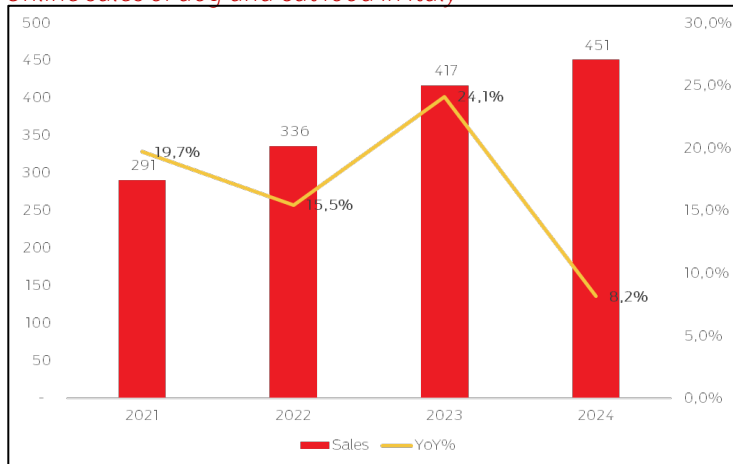
2025 Assalco – Zoomark Report Source: Circana - 52 weeks to 29th December 2024

## PET MARKET E-COMMERCE

### An overview of the e-commerce market for pet food

According to internal data, the total value of the **online market for dog and cat food** in Italy in 2024 was **€ 451 million**, up 8.2% compared to 2023.<sup>6</sup>

### Online sales of dog and cat food in Italy



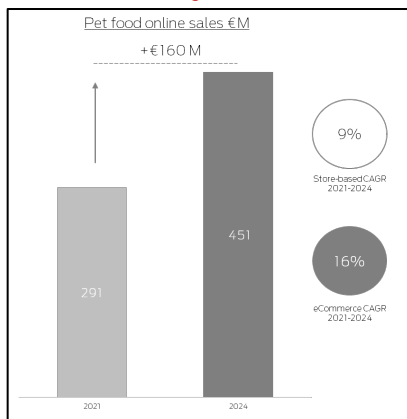
2025 Assalco – Zoomark Report - Source: internal data

The 2024 figures pertaining to year-on-year growth (YoY%) once again show interesting trends, it being assumed that the pandemic is no longer driving online purchasing.

**Cat products** are leading the **growth** of the online channel: sales of wet food are up 13% and dry food 9%.

Compared to 2021, the Compound Average Growth Rate (**CAGR**) is 16% for online sales of pet food, which translates to € 160 million.

### Online sales of dog and cat food in Italy



2025 Assalco – Zoomark Report - Source: internal data

The analysis focuses on pet food, though the online channel is also popular for purchases of pet accessories and care and hygiene products. One key factor when choosing the online channel is the convenience of home delivery of heavy products, such as bulk formats of cat litter. Nonetheless, consumers are still interested in brick-and-mortar shops where they can choose products in person and compare offers.

<sup>6</sup> Coverage equal to about 90% of the online category.



### An analysis of the platforms and market estimates: research by Casaleggio Associati

According to the 2025 E-commerce Italy Report by Casaleggio Associati, in 2024 there were 174 sites exclusively dedicated to pet products with significant traffic in Italy. This is a limited number, around 2% of all the sites analysed in the report, but with a high percentage of Italian sites: 80% of those in the top ten are Italian-owned.

The ranking identified the following top ten pet market e-commerce platforms in Italy in 2025 (data from 20th March 2025):

Latest update: 20 March 2025

Search a company (e.g. www.amazon.it) <span>Search</span>						
Sector: Pets <span>Source: SEMRUSH CA</span>						
	Company	Sector	Popularity Index	Est. Unique Visitors	Est. Avg Time	Est. Bounce Rate
1	Zooplus	Pets	10.000	1.018.919	09:24	48,0% <span>Follow</span>
2	Arcaplanet	Pets	9.306	928.772	07:29	58,0% <span>Follow</span>
3	Isola dei Tesori	Pets	3.611	146.336	06:32	55,0% <span>Follow</span>
4	QuattroZampe Shop	Pets	3.472	159.213	10:24	53,0% <span>Follow</span>
5	Bauzaar	Pets	3.333	149.111	04:20	48,0% <span>Follow</span>
6	AquariumLine	Pets	2.778	71.400	10:27	31,0% <span>Follow</span>
7	Robinsonpetshop	Pets	2.639	101.453	06:37	71,0% <span>Follow</span>
8	CentroVete	Pets	2.639	97.605	06:37	55,0% <span>Follow</span>
9	Bitiba	Pets	2.639	84.034	05:42	40,0% <span>Follow</span>
10	FarmaPets	Pets	2.500	91.110	07:05	63,0% <span>Follow</span>

2025 Assalco – Zoomark Report - Source: Casaleggio Associati, ECommerce ranking

The **list of the main e-commerce sites operating in the pet market in Italy** was drawn up by the Ecommerce Ranking algorithm, which considers a number of factors to evaluate the popularity and performance of online platforms. The main parameters are:

- Number of unique visitors in Italy monthly (estimated from Semrush data);
- Online brand popularity, based on mentions, research and social media interactions;
- Average time spent on the site, an indicator of the level of user involvement;
- Bounce rate, which measures the number of users who leave the site after viewing a single page;
- Importance of the site in the sector in question, calculated on the basis of previous data and proprietary metrics of Casaleggio Associati.

### Who buys online? The study by Trovaprezzi

On the occasion of International Dog Day and International Cat Day, the price comparison site Trovaprezzi analysed the behaviour of Italian consumers buying products for cats and dogs, and drew up a profile of the pet owners who use the price comparison site when making online purchases.

Those who carry out online searches for pet products are mainly **women** (62%), but these searches do not appear to be linked to a specific age group: prospective online shoppers are **equally distributed among the age groups** 25 – 34, 35-44 and 45-54. When it comes to geographical distribution, the Trovaprezzi portal notes that a third of searches for products and pet food are carried out in the Lombardy region. This is followed by Lazio, with 16% of searches, Emilia-Romagna at 7% and Tuscany, Piedmont, Veneto and Campania at 6%.



## SOCIAL AREA

# THE PET POPULATION IN ITALY

The pet population in Italy is estimated to be **almost 65 million**. Compared to the previous year, the total population is stable, but the ratio between the various species has changed.

**Dogs and cats** total **over 20 million**, with cats now in the lead at 12 million - more than 1 million more than last year. Dogs are also on the up, but with a more moderate increase, which regards mostly small dogs.

Although the total remains stable, the make-up of the pet population is changing

The most popular pets in Italy continue to be **fish**, yet due to a reduction in the number of shops selling live animals and more stringent legislation (Legislative Decree 135/2022), their numbers went down to **28.1 million** in 2024. Assuming average ownership of 20 fish, we can calculate that there are **1.4 aquariums** in Italian households.

The number of **pet birds** has also been affected by the reduction in the number of vendors selling live animals, and the more stringent legislation regarding the registration of pets. In addition, the number of hobbyists has fallen. The pet bird population in Italy is estimated to be **12.7 million**.

The population of **small mammals** and **reptiles** is estimated to be stable, at over **3 million**.

Estimate of pets by species - 2024 (million)	
Dogs	9
Cats	11.9
Fish	28.1
Aquariums	1.4
Ornamental birds	12.7
Small mammals and reptiles	3.2
Total Pet Population	64.9

2025 Assalco – Zoomark Report - Source: internal estimate

## Towards a National Pet Registry

These estimates will be accompanied by official figures gathered by the Ministry of Health, which is working with Italian regional authorities to make the new Pet Identification System fully operational throughout the country. The National Pet Registry, known as the **National Identification System for Companion Animals** (SINAC), will in fact guarantee timely data, which is essential for the correct management of public and animal health, formulating effective measures to protect animal welfare and the related economic planning.

**Registration is now required for all pets: dogs, cats and ferrets, but also rodents, pet rabbits, invertebrates, ornamental fish, amphibians, reptiles and birds.**

## PET MONITOR 2025 – CONSIDERATIONS ON THE PET FOOD MARKET

Pet Monitor 2025 is an exclusive survey of Italian pet owners and retailers carried out by Pet Trend magazine together with the website Animali da Compagnia.it, in collaboration with Marilena Colussi, director of marketing and communication research. The aim of the survey is to identify, analyse and monitor over time the trends that influence the present and future of the pet food market.

### Pet owners

The survey<sup>7</sup> was administered via web to **450 owners of dogs and/or cats**, with a lesser number of other animals (rodents, birds...), which were almost always present along with dogs and/or cats. The questionnaire was answered by the family members who bought pet supplies. The sample was representative of the main geographic areas of Italy and age groups (from 18 to 70 and over) and varied in terms of household composition<sup>8</sup>, occupation (about half work) and education<sup>9</sup>. *The profile of pet owners*

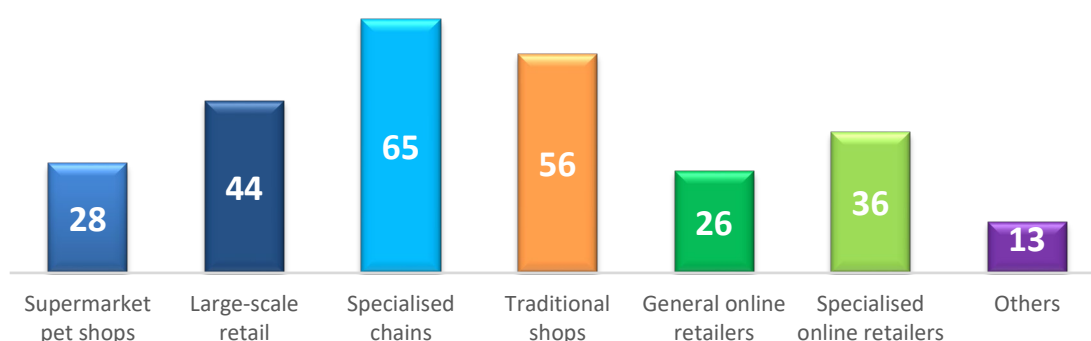
There was a higher than average percentage of women.

Among dog owners, the majority (59%) own only one dog, but 21% of dog owners have two, 9% have three and 11% four or more. Among cat owners, there is a higher percentage of multiple ownership: 16.8% have at least four cats, 13.6% have three, 22% have two and 47.6% one. In addition, 73% of the sample has lived with pets for over 5 years.

Among the main results that emerged:

- **Pets are bona fide members of the family.** 96% of dog and cat owners consider them to be an integral part of the family.
- **The impact on consumption.** The importance of pets also has a direct impact on the demand for products and services: growing attention is being paid to animal well-being, health, nutrition and comfort, and the market is constantly evolving to respond to pets' emotional needs, above and beyond their physical needs.
- **The sales channels for pet products.** Pet owners use different sales channels for their pet purchases (food and other products). In first place (65%), are specialised chains (e.g. Arcaplanet etc.). This is followed by purchases in traditional pet shops (56%) and supermarkets (53% in supermarkets and/or supermarket pet shops such as Petstore Conad). The online channel is significant: more than 1/3 of purchases take place online. Other channels were marginal (veterinary, grooming...).

### Sales channels for pet products



Source: Pet Monitor 2025

### Pet retailers

The sample included **50 retailers located throughout Italy**, representing different distribution

<sup>7</sup> The fieldwork started in mid-December 2024 and ended at the end of February 2025.

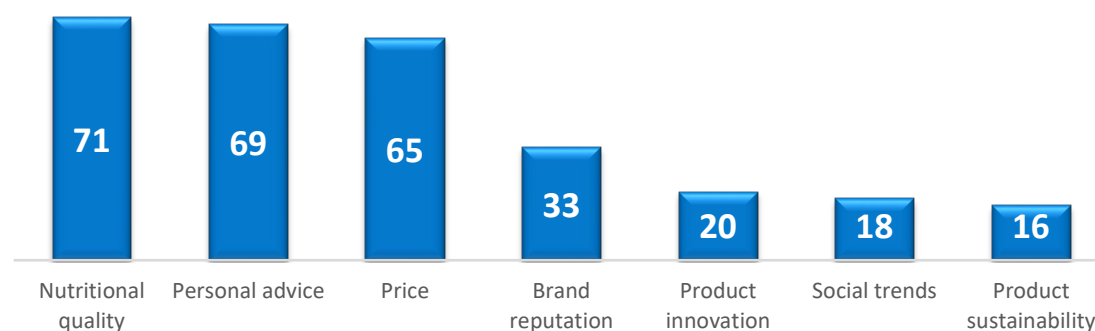
<sup>8</sup> 35% couples, 32% families (two parents and at least one child), 22% single, 9% single parents, 2% other

<sup>9</sup> 58% high school diploma, 30% degree, 12% middle school diploma

formats. The survey was carried out online between January and the end of February 2025. The main data gathered show:

- **The market trends in pet food:** strong growth of *natural* and *grain-free* products, with an increasing focus on *functional* foods, in particular "*complementary products*" in the form of tablets, powders and pastes for specific functional purposes to support the well-being of companion animals. Also on the up were certified *green*, sustainable foods; and lately, to a limited extent, *organic* foods too.
- **The role of customer service:** 84% of retailers consider customer service essential for loyalty and business success. 57% of customers rely greatly on the retailer's advice when choosing products for their pets.
- **Sustainability:** for 59% of pet retailers, customers attach importance to eco-friendly products and brands: green packaging, recycled and/or biodegradable plastics, sustainable manufacturers, waste and scrap reduction.
- **Factors influencing product choice:** according to 71% of retailers, pet owners select products for their nutritional quality. Almost the same percentage believes that product choice is influenced by advice from sales personnel. Price is also a factor.
- **Premiumisation:** there is also interest in premium food products (high quality natural treats and chews, extra palatable formulas and high-quality ingredients).

#### *The factors that influence customer choice according to Pet retailers*



Source: Pet Monitor 2025

#### *New food trends: supplements / "complementary products"*

These are **specific products** for pets, **in the form of tablets, powders and pastes**, designed to deliver specific functional benefits, similar to the "supplements" for humans. 41% of pet owners are familiar with and generally buy this kind of product, which supplements their pets' diet to support various bodily functions.

Complementary products: tablets, powders and pastes designed to deliver specific functional benefits

52% have a positive opinion of supplements for pets (dogs and cats), as well as for humans (50%). 79% of respondents (very and quite favourable) are willing to use them for their pets.

Retailers also see these "complementary products" in the form of tablets, powders and pastes in a positive way, both for humans and, even more so, for pets: 76% recognise their value and promote their use, above all for immune system support and joint health.

## PET ACCESSORIES: THE STUDY BY NOMISMA

Nomisma<sup>10</sup> conducted the study "Analysis of the non-food pet sector, the voice of Pet Owners and Specialised Channels" between 2024 and 2025. It explored the sector both from the point of view of pet owners<sup>11</sup>, and that of traditional pet shops and pet shop chains<sup>12</sup>.

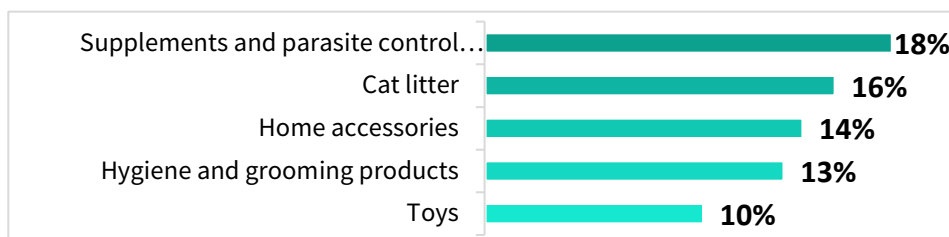
### The role of non-food purchases in Italian spending on pets

Italians are increasingly attentive to the well-being and care of their pets. Their annual expenditure, which includes all spending on products and services (pet food, medical expenses, accessories...) was estimated at € 7 billion in 2023. This figure includes food, "non-food" (accessories, hygiene and care products, litter, home and travel accessories, electronic equipment, etc.), veterinary expenses and other services such as grooming. Spending on **accessories** and care and hygiene products stands at around **€ 1.2 billion**.<sup>13</sup>

According to the Nomisma survey of pet owners, the non-food categories where they spend the most are **supplements and parasite control products**, which make up just under a fifth of total spending, followed by **cat litter** (16%) and **household accessories** (e.g. beds, bowls, cushions and other products for pet well-being and comfort), which represent 14% of the non-food spend.

Pet owners are interested in parasite control products, cat litter and home accessories

### Percentage breakdown of non-food pet spending in 2023 (top five categories)



Source: Nomisma survey of Italian pet owners

Categories not included: transport accessories, leashes and muzzles, clothing and electronic equipment.

When buying non-food items, **37%** of Italian pet owners choose the **specialised channel**, with a relative preference for pet shop chains, while another **35%** indicate **online** as their first channel, both general and specialised online retailers.

<sup>10</sup> An independent company offering sectoral and territorial studies, economic research, market intelligence and consultancy services. For more information: [www.nomisma.it](http://www.nomisma.it)

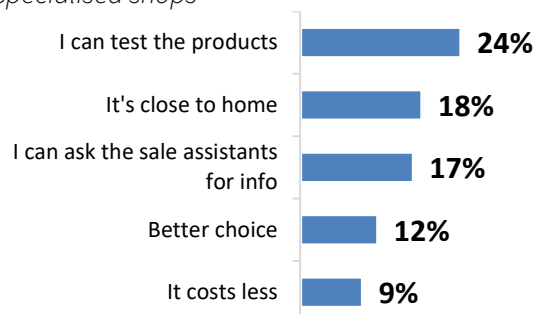
<sup>11</sup> CAWI interviews with more than 600 Italians.

<sup>12</sup> CAWI and CATI surveys of about 120 shops nationwide.

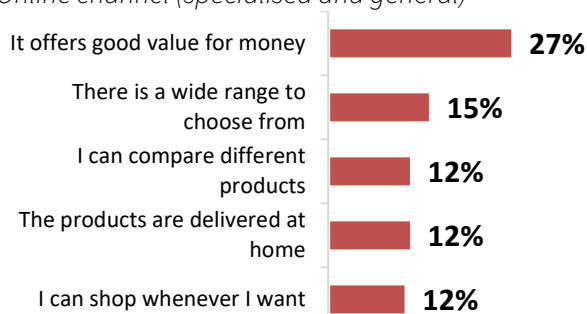
<sup>13</sup> Source: ISTAT, final household expenditure 2023

## The advantages of the various sales channels for non-food pet purchases (top 5 in order of importance)

### Specialised shops



### Online channel (specialised and general)



Source: Nomisma Survey on Italian pet owners

Alongside these dynamics, among those who routinely choose large-scale retail outlets for non-food pet purchases, more than half indicate value for money and the convenience of combining pet purchases with the household shop as key factors in their choice.

Regardless of the preferred channel for buying accessories and other non-food products, the main factors taken into consideration by pet owners are **price** (26% of owners mainly look for low prices or discounts when buying non-food items), and personal **tastes** (20%), while **brand loyalty** is the third factor: 20% of pet owners choose products by a well-known or previously used brand.

### The perspective of pet shops specialised in non-food items

The survey carried out by Nomisma for Zoomark involved both independent stores and chains, both large national and international groups and chains connected to supermarkets.

Traditional pet shops have an average surface area of close to 200 m<sup>2</sup>, and have about 2 employees per point of sale. In general, the study reported that almost 3 out of 4 shops have been in business for over 10 years, showing their connection to their local area and strong relationship with customers.

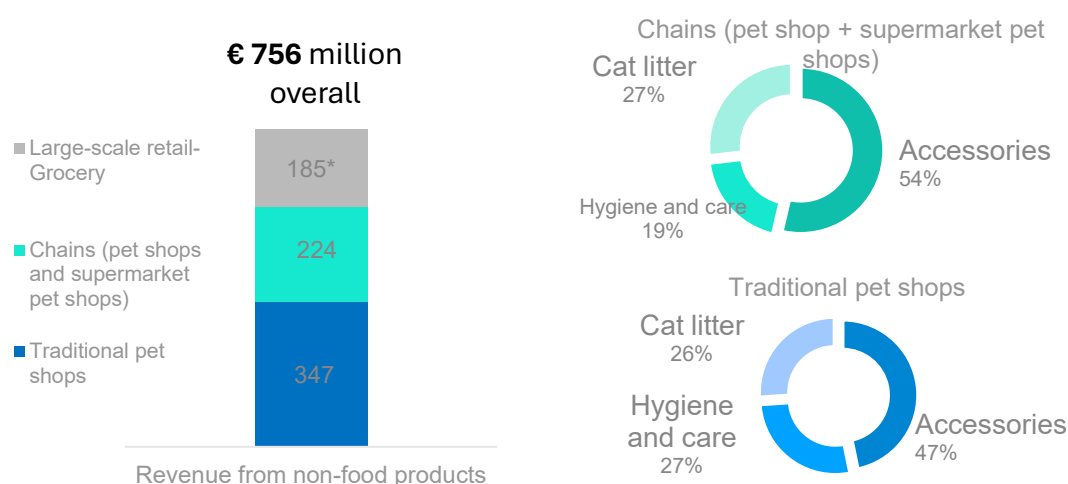
The non-food market is estimated to be worth € 756 million

In terms of the **turnover** of the **non-food** sector in specialised stores, in 2023 it was over € 570 million, as well as just under € 200 million from cat litter and accessories in large-scale retail outlets. Overall, non-food pet products are worth **€ 756 million**, 17% of the total pet market.

As for the turnover generated by the sub-categories of the non-food sector, there are slight differences between the figures for pet shop chains, which recorded higher sales of accessories (54% of non-food turnover) and cat litter (27%), compared to traditional stores, where sales of pet care and hygiene products were relatively higher (27%), despite accessories being the key category in terms of non-food turnover.



*Market for non-food pet products in Italy (2023) and sales breakdown by type of shop and product  
\*in large-scale retail, the figure refers only to cat litter and accessories*



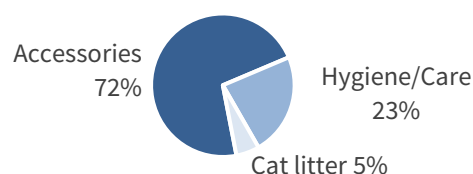
2025 Assalco – Zoomark Report - Source: Nomisma estimates based on Istat data, 2024 Assalco – Zoomark Report, Survey of Italian pet shops

Analysing non-food sales by **animal species**, 57% of sales in the pet shops surveyed were products for dogs, followed by litter and cat products (26%) and products for fish and turtles (8% of the total).

In terms of **product assortment**, specialised shops offer customers between 1,800 and 2,000 non-food items. Overall, accessories account for more than 70% of the product assortment. Pet care and hygiene products make up about a quarter of the total items on offer, while there is less assortment among cat litter products.

*Breakdown of the product assortment (% of total non-food products available in specialised pet shops)*

2025 Assalco – Zoomark Report - Source: Nomisma Survey of Italian pet shops



When it comes to the choice of products to stock, one **leading factor**, prioritised by more than one in four shopkeepers, is to select Italian-made products. This is followed by personal taste (crucial above all for small independents). It is a dynamic that reflects the preferences of the pet owners themselves. Price plays a secondary role when it comes to selecting products to sell: fewer than one in ten shopkeepers indicate it as their primary criterion.

As well as supplying a wide range of food and non-food products, specialised shops often also offer various **additional services** designed to consolidate their relationship with their customers, such as social media (77% of the points of sale involved in the study) and a website (60% of cases), through which almost a third of the shops sell online, in some cases delivering to the customer at home. 37% of stores, especially the smaller ones, where the bond with customers can be stronger, offer grooming services. It is slightly less common to see shops organising courses and special events, but 30% of them do offer nutritional and veterinary advice among their services, to help monitor and improve the health of pets.

## PETS AS A SOURCE OF WELL-BEING: ECONOMIC AND SOCIAL INDICATIONS

According to recent research published on 31st March in the journal *Social Indicators Research*<sup>14</sup>, the **presence of a pet** can contribute to individual well-being to an extent similar to that resulting from close social relationships, such as being **married** or having regular contact with friends and family. The study, based on a representative sample of 2,500 British families, estimated that the benefit in terms of life satisfaction associated with living with a dog or cat is equivalent, in economic value, to a **significant increase in annual income**.

Using an advanced statistical methodology known as the instrumental variables approach, researchers from the **University of Kent** and the **London School of Economics** isolated the causal effect of the presence of a pet on life satisfaction, beyond a mere correlation. The findings suggest that daily interactions with a pet can provide a level of emotional support comparable to that offered by meaningful human relationships. This reinforces the idea that pets represent more than just an element of affective value: they are also an important factor when it comes to our social and psychological well-being, which is even more significant for certain age groups.

### Pets: a valuable presence for seniors

On the occasion of its 69th National Congress, the **Italian Society of Gerontology and Geriatrics** (SIGG) addressed the beneficial effects of the relationship with pets for the elderly. Working in partnership with veterinarians, the specialists highlighted the beneficial effects of animal-assisted interventions on anxiety, depression and dementia, but also how the mere presence of a pet stimulates motor activity, and lowers blood pressure, heart rate and respiratory rate, reducing the risk of strokes and heart attacks.

Living with a pet **reduces elderly people's medical appointments by 15%**, and offers **health benefits on a par with medication**, as well as helping to combat loneliness. This equates to a **saving for the National Health Service** of about **€ 4 billion** annually, due to the reduced need for medical interventions and reduced spending on medicines.

### Pets and mental health: findings from the Istituto Superiore di Sanità

The Centre for Behavioural Sciences and Mental Health (SCIC) of the Istituto Superiore di Sanità highlighted the **important role of companion animals in the field of mental health and psycho-physical well-being**. Animal Assisted Interventions (AAI) represent a support in clinical and care-giving settings, and can be used in the context of a variety of conditions, including autism spectrum disorders, psychosis (including at the onset), and neuromotor disorders such as Parkinson's disease, as well as supporting vulnerable individuals such as elderly people in residential facilities and child victims of abuse or bullying.

The SCIC Centre, which in 2015 contributed to drawing up the National Guidelines for AAIs – a reference document that provides guidelines for training and application to ensure best practices, unified on a national scale – has also helped develop specific protocols for the use of AAIs in different contexts.

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<sup>14</sup> Gmeiner, M.W., Gschwandtner, A. The Value of Pets: The Quantifiable Impact of Pets on Life Satisfaction. *Soc Indic Res* (2025). <https://doi.org/10.1007/s11205-025-03574-1>

## PETS AT WORK: A GROWING TREND IN ITALY TOO

In recent years, the idea of pets being present in the workplace has aroused growing interest, in line with a greater focus on the psycho-physical well-being of workers and the importance of the human-animal bond. This has even led to the introduction of "Take your dog to work day".

In Italy, for a number of years, various pioneering companies have been letting employees take their pets to work on a regular basis, after drawing up rules to safeguard the rights of all their workers. There are clear signs that private, public and institutional settings are now more open to the idea.

A case in point is the **Italian Senate**, which - with the due regulations - has recently authorised pet access to its offices, at the behest of a number of senators aware of the issue of animal well-being and work-life balance, such as Senator Biancofiore. This development has great symbolic importance, which could pave the way for a cultural shift.

Another significant example comes from the **Sicily Regional Council**, where employees of the Department of the Environment are now allowed to bring their dogs to work, as long as they respect specific rules designed to safeguard both the animals and the other employees. The initiative, which also requires participants to ensure they respect the workplace and the work of their colleagues, makes Sicily one of the first regional administrations to enable personnel to enjoy their pets' company during working hours.

As well as public offices, some universities have also adopted pet-friendly policies, allowing staff to bring their pets - dogs and cats in particular - to work.

One of the first universities to formally introduce this type of policy was the **University of Verona**, which since 2020 has permitted its employees to bring their pets into the office, subject to authorisation and internal regulations. More recently, the **University of Trento** has also introduced a pilot project enabling employees to bring cats and dogs into the workplace, as long as they comply with health and safety and organisational regulations, and do not enter teaching areas, communal areas or laboratories. A similar initiative has also been introduced by the **University of Milan-Bicocca**, which in 2024 approved a regulation for the controlled admittance of pets into the workplace.

Pet-friendly  
universities

These examples reflect the changing view of animals in society, showing how **pet-friendliness can represent an added value**, not just for pet owners, but for the culture of the entire organisation. Several international studies have demonstrated that **the presence of animals in the workplace can help reduce stress, improve productivity and strengthen interpersonal relationships**.

Though a number of not insignificant regulatory and management aspects need to be addressed - from safety to compatibility with possible allergies or phobias - the work being done by some Italian institutions represents a concrete step towards a new conception of the workplace, more empathetic and attentive to the needs of people and pets.

## WORKING DOGS: HELPING TO PROTECT THE ENVIRONMENT AND PUBLIC HEALTH

The use of animals specially trained to carry out activities in the public interest is a growing field that combines behavioural knowledge and innovation to serve the community. Experiences in the field confirm the strategic role these animals can play when it comes to strengthening prevention and control systems.

### Dogs trained to detect the *Xylella* bacterium

One of the most significant cases concerns the dogs trained for the **early identification of the *Xylella* bacterium**, a plant pathogen that has decimated the olive groves of Southern Italy.

Six sniffer dogs are being used to identify trees affected by the bacterium before any visible symptoms appear, thus making it possible to intervene more effectively. The *Xylella* dog project was set up and funded by Coldiretti and Unaprol, in partnership with the Italian Kennel Club (Ente nazionale cinofilia italiana) and the CNR (National Research Council).

### Arson dogs trained to detect the presence of accelerants

After appropriate trials, in November 2022 the first arson dog unit in Italy was set up. These dogs are specifically trained to **detect the presence of accelerants in wildland fires**. The first team comprised Aika, a Belgian Malinois, and her handler Giovanni Cirivello, a dog trainer in service in the Palermo Fire Brigade. In 2025, Max, a four-year-old Belgian shepherd from the Sicilian regional unit, has been involved in investigations of potential cases of arson throughout Italy.

### Combating African swine fever

In the context of the measures implemented to contain African swine fever (ASF), there are initiatives involving dogs trained to **identify infected wild boar carcasses**, thus enabling affected areas to be decontaminated more rapidly. As of 2019, ENCI<sup>15</sup>, with the patronage of ISPRA<sup>16</sup>, LEGAMBIENTE, SIEF<sup>17</sup> and the Department of Veterinary Medicine of the Federico II University of Naples, set up a pilot project to train dog+handler teams to detect infected carcasses and thus help with monitoring operations.

### "Tartadogs": the dogs helping to protect marine biodiversity

Italy's "Tartadogs" are dogs trained to **detect nests of *Caretta caretta* sea turtles** on the country's beaches. The initiative is part of Legambiente's Life Turtlenest project and enables nesting sites to be identified early on, guaranteeing that they can be protected throughout the incubation period, up to the hatching of the young and their journey towards the sea.

### Bear dogs as a deterrent

Six dogs in the canine unit of the Trentino Forestry Corps have been trained to detect the presence of bears, signal their proximity and deter them from approaching residential areas, farms and areas frequented by people.

### Dogs trained to detect landmines and for humanitarian remediation

The European Union supported the use of mine detector dogs in Ukraine as essential in **post-conflict remediation efforts**. The first dogs trained were used in high-risk areas to detect explosive devices hidden in the ground.

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<sup>15</sup> Ente Nazionale Cinofilia Italiana (the Italian Kennel Club)

<sup>16</sup> Istituto Superiore per la Protezione e Ricerca Ambientale (Higher Institute for Environmental Protection and Research)

<sup>17</sup> Società Italiana di Ecopatologia della Fauna (Italian Society of Wildlife Ecopathology)

### Sniffer dogs helping to combat the synthetic drugs trade

In the United States, in response to the fentanyl epidemic, dogs have been trained to detect trace amounts of this substance, as well as marijuana, cocaine, heroin, methamphetamine and ecstasy. These dogs are used in airports and at land borders and represent a vital element in the **war against drug trafficking**.

### Assistance dogs

Assistance dogs **provide support to people with physical, cognitive or mental disabilities**, carrying out tasks that the individual cannot perform independently. They include guide dogs for the blind, dogs for the deaf, mobility assistance dogs, emotional support dogs for post-traumatic stress disorder, autism and developmental disorders, and medical alert/response dogs (for conditions such as diabetes or epilepsy).

In the 2025 Budget these dogs have been acknowledged, guaranteeing that they can access public transport and public places, given the significant, ongoing support they provide to people with disabilities and health conditions. It is hoped that this recognition will soon also extend to dogs involved in AAI and working dogs.

## THE CHANGES IN ITALIAN AND EUROPEAN LEGISLATION SAFEGUARDING PETS

In recent years, on both a European and national level, new institutional and procedural measures, as well as a range of legal measures, have been introduced to safeguard the rights of pets, with the aim of combatting the stray animal crisis and animal cruelty, and protecting the public.

### A European Commissioner for animal health and welfare: a turning point for the Union

For the first time in the history of the European Union, the Commission has appointed a Commissioner responsible for animal health and welfare, the Hungarian Olivér Várhelyi.

This landmark decision marks a key step towards **greater institutional attention to animal welfare**, something that has long been the focus of debate in Europe.

### The reform to the legislation regarding crimes against animals: a new legal and sentencing framework

In Italy, in 2024 the bill signed by the Hons. Brambilla, Rizzetto, Bergamini, Dalla Chiesa, De Monte, Evi, Gallo, Longi and Sacconi Jotti for an organic reform of **animal cruelty legislation** took an important step forward. After being approved by the Chamber of Deputies on its first reading, it is currently being examined by the Senate. The bill proposes a sweeping reform of Section 9 B of Book II of the Criminal Code, and is based on recognising animals as sentient beings and thus **worthy of protection in their own right**, no longer purely in terms of their relationship with humans.

### The new Highway Code: Zero tolerance for animal abandonment

The amendments to the Italian Highway Code that came into force on 14th December 2024 also sent out a strong message on the **road safety** and **animal protection front**. Among the measures introduced, the harsher penalties for abandoning pets or captive animals were significant. In addition to the provisions of Article 727 of the Criminal Code, the new Highway Code increased penalties by a third if this criminal act is committed on the road or near one. Moreover, if the act of abandoning an animal results in a road accident causing injuries or fatalities, the penalties that apply are those for a criminal vehicular operation resulting in bodily harm, or vehicular homicide, respectively. Along with the main penalty, the additional penalties foreseen by current legislation for those offences are also applied, including a driving ban for six months to one year or revocation of the driving licence.

Driving bans for  
those who abandon  
animals on the roads

### Access to beaches for pets: new criteria in tenders for state concessions

The new so-called "Anti-Infringements" decree **explicitly acknowledges pets' right to access public coastline, lakeside and riverside areas**. The measure transposes the indications of the European Commission, taking over from the infringement procedure regarding state concessions for tourist-recreational use.

### Access to healthcare facilities: the example of Tuscany

With the aim of enhancing patients' psycho-physical well-being, the Tuscany Regional Council has adopted an innovative measure that **allows pets to be taken into public health facilities**, clinics and nursing homes. It applies to dogs, cats and other registered animals.

### Financial assistance for veterinary expenses: the "pet bonus" comes into force

After months of waiting, the Conference of Regions has finally approved the measure introducing the **"pet bonus"** that was included in the 2024 Budget but not yet implemented due to no agreement being reached between central government and the regional authorities. The measure, with total funding of € 750,000 distributed over three years (2024-2026), aims to help a limited number of citizens pay for

veterinary medicines and appointments. The amount of money provided and the procedure for applying will be decided by each Region, responsible for implementing the measure.

The much-needed **reduction in the VAT rate on pet food and veterinary care** has yet to be introduced: VAT currently stands at 22%, the same rate applied to non-essential products and services. Consumer and animal rights associations, along with representatives of the veterinary profession and the pet industry, have long been calling for VAT to be cut from 22% to 10%, in line with European legislation, which applies the subsidized rate to animal food products. Reducing VAT would help counteract the phenomenon of pet owners abandoning or giving up their pets: a reprehensible act but one which is sometimes motivated by financial reasons.

Cutting VAT  
on pet food and  
vet services from  
22% to 10%

Once more, there are initiatives under way in this Legislature to amend the law on VAT and include veterinary services and pet food in the lower bracket. The bill was presented by the Hon. Tassinari and co-signed by the Hon. Dalla Chiesa, supported by the Chairman of Assopets, Maturi.

#### The new ATECO code for grooming services: official recognition for a growing industry

From 1st April 2025, **grooming** services for pets will be identified by the **new ATECO code 96.99.12**, introduced as part of the review of the classification system for business activities carried out by ISTAT.

#### New EU legislation for safe pet accessories

Product safety is regulated and guaranteed by specific rules for individual sectors (such as machinery, toys, pressure equipment...) and, in the absence of specific regulations, until 13th December 2024, it was exclusively governed by the Consumer Code.

However, the spread of digital products and the growth of e-commerce have called for greater attention to consumers and harmonisation to avoid grey areas and disparities due to the application of different regulations between Member States.

EU law has therefore developed a **framework of rules and provisions designed to regulate the manufacture and sale of products to ensure their safe use and protect users and consumers**: EU regulation 2023/988, applicable from 13th December 2024. The Regulation applies to all consumer products, new, used, reconditioned or repaired, sold both online and offline, which do not have specific safety regulations: in the absence of specific provisions regulating safety, Regulation 988 applies across the board, to "plug the gaps".

This is the case with **pet accessories**: as this sector does not have specific rules of its own, it therefore falls fully within the scope of Regulation 988. These products are therefore covered by the new measures introduced by the regulation, e.g. responsibility being extended to all economic operators in the supply chain, including digital marketplaces and platforms. The Regulation also introduces updated parameters and criteria to evaluate product safety, including labelling bearing instructions and warnings. For imported products, the Regulation imposes the mandatory presence of an accountable economic operator in the EU, and in terms of the Authorities, closer supervision of the market and rapid alert system (Safety Gate).

Product safety  
regulations also  
apply to pet  
accessories

#### Antitrust laws regarding e-commerce for the sale of pet food and veterinary products

In order to protect buyers of pet products, the Italian Antitrust Regulator has **examined online vendors of pet food, veterinary medicines and parapharmaceuticals**.

## THE GREEN DEAL

The pet food and pet care industry is among the sectors taking on the European Green Deal and applying the new regulations now in force or in the process of being drawn up.

In particular, **EU Regulation 2025/40, on packaging and packaging waste (PPWR)**, published in January 2025, introduces progressive but stringent norms on environmental sustainability and packaging labelling. The new Regulation introduces extended responsibilities for manufacturers when it comes to preventing packaging waste, such as reducing unnecessary packaging, and collection, treatment and recycling.

### Sustainable packaging

Among the new rules, from 1st January 2030 non-recyclable packaging will no longer be permitted on the market, and plastic packaging must contain the required percentage of recycled material. This percentage will increase from 2040.

The PPWR Regulation also prohibits the use of claims that highlight characteristics of packaging that are an obligatory requirement of the Regulation.

And when it comes to claims and marketing communications, in September 2026, the so-called **Greenwashing Directive**, EU Directive 2024/825, will come into force. This will empower consumers for the green transition and strengthen consumer protection against untrustworthy or false environmental claims.

Meanwhile the so-called **Green Claims Directive** has yet to be approved. This proposed directive of the European Parliament and Council regards the communication of explicit environmental assertions.

Here too, the aim is to ensure consumers receive reliable information about product sustainability, and to combat the proliferation of private initiatives regarding sustainability labelling. To this end, Member

### Clear, substantiated sustainability information on product labels

States are required to approve claims to ensure that the information they provide is reliable, transparent and regularly reviewed.

When it comes to pet food products, the **calculation method officially recognised by the European Commission to justify claims regarding the environmental impact of dog and cat food (the PEFCR for Pet Food)** has recently been updated.

The PEFCR (**The Product Environmental Footprint Category Rules**) for Pet Food is the official method for communicating the environmental impact of products in the single market.

Member States and the private sector are invited to use the PEF method, which is a method of LCA (life cycle assessment) developed to **evaluate the environmental impact of products across their entire life cycle**, i.e. from the sourcing of the raw materials to the final disposal of the packaging.

Lastly, there is also the **EUDR Regulation on combating deforestation**, Reg. EU 2023/1115, which establishes strict rules regarding the marketing and export of products made using relevant commodities derived from cattle, cocoa, coffee, oil palm, rubber, soya and wood (listed in Annex I of the Regulation). European operators, including those in the pet food and pet care industry, who are the first to place on the market or export from Europe products listed in the EUDR Regulation must demonstrate that these products are deforestation-free, have been produced in compliance with the legislation of the country of production and are the subject of a declaration of due diligence.



## HEALTH AREA

# PET FOOD: A RESOURCE THAT GUARANTEES SAFETY AND A BALANCED DIET

## The role of pet food in pet longevity

Data from Japan confirm a trend that is increasingly evident on a global level: **our pets' quality of life is constantly improving**, thanks also **to the significant role played by the food they eat**. A notable example comes from the survey<sup>18</sup> conducted by the Japan Pet Food Association (JPFA), according to which the average life span of pet dogs has increased by almost a year in the last decade, from 13.87 years in 2010 to 14.62 years in 2023.

This progress can be attributed to the fact that owners are now more attentive to their pets' health, access

Pet food contributes  
to pets' increasing  
life span

to veterinary care is more widespread, and the ongoing progress of the pet food industry, committed to developing increasingly dedicated, balanced nutritional solutions designed to meet the specific needs of each stage of the pet's life.

## Pet food safety: the joint commitment of manufacturers and official veterinarians

The safety and quality of pet food is ensured thanks to the significant system of controls carried out at production plants and on products, as well as throughout the supply chain.

Every day manufacturers implement **control plans based on risk analysis** and approved by the relevant health authorities. In addition, regular inspections are carried out by official veterinarians from the National Health Service.

## The National Animal Nutrition Plan

The **National Animal Nutrition Plan** (PNAA) drawn up by the Ministry of Health is designed to plan and roll out an official system of controls throughout Italy, across the entire animal feed supply chain, guaranteeing the protection of human, animal and environmental health. The PNAA is implemented by means of inspections, with samples taken and analysed throughout the supply chain, from the sourcing of the raw material to distribution.

## 99% of pet food meets the standards

The results from the last annual report on the checks carried out, regarding 2023 (the last year of the 2021-2023 PNAA), confirm the compliance of the pet food supply chain.

Results for 2023:  
99% of pet food  
met the standards

In particular, 98% of finished pet food and raw materials destined for pet food production was found to **comply with current regulations**.

Considering **pet food alone**, the figure is **99%**.

Checks carried out on imported products did not detect any non-compliant pet food products.

## The work of the pet food industry: updating the Nutritional Guidelines

In 2024, the European pet food industry updated the main Nutritional Guidelines for pet dogs, cats and rabbits. The work, coordinated by FEDIAF – the European Pet Food Industry Association - represents an essential benchmark for formulating safe, balanced food products that comply with European regulations. The Guidelines are **rigorously reviewed** by FEDIAF's Nutrition Working Group and Scientific Advisory Board, a scientific committee composed of independent nutrition scientists from numerous European universities.

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<sup>18</sup> [Dog lifespan in Japan up by 0.75 years since 2010 - The Mainichi](#)

## THE EVOLUTION OF PET HEALTH SERVICES<sup>19</sup>

### Veterinarians and veterinary facilities today

In Italy, at 31st December 2024, the Register of Italian Veterinarians numbered **35,484 professionals**: 18,133 women and 17,351 men (source: FNOVI). There are currently 25,380 "active" veterinarians (source: ENPAV). 4,499 of them are Official Veterinarians (working for the National Health Service) according to the latest statistics on health care personnel published by the Ministry of Health; 1,662 are affiliated to the regional health service. The majority of veterinarians (around 17,000) are self-employed practitioners working in the field of companion animals, equines and livestock. There are 8,647 private veterinary facilities for companion animals in Italy, which include clinics, practices/offices, hospitals and laboratories.

### The new rules for admission to the degree course in Veterinary Medicine

The rules for admission to the master's degree programme in Veterinary Medicine are in the process of being reformed. The reform, which will also apply to courses in Medicine and Surgery and Dentistry, and will enter into force from the academic year 2025-2026, entails a **structural review of the current selection system**, with the aim of making the process more merit-based and in line with the training and personnel needs of the Italian National Health Service (SSN).

The reform does not do away with the number cap, but there will no longer be an admission test. Enrolment will be open to all for the first semester, which will be the same for courses in Medicine, Dentistry and Veterinary Medicine. Access to the second semester will be restricted to those who have obtained all the credits required in the first, in a national ranking in order of merit.

If not admitted, students will be able to continue their studies on other courses in the biomedical, health, pharmaceutical or veterinary field, and the credits they have obtained will be recognised. For the first semester students will therefore be able to apply free of charge to two courses.

The same first semester for students of Veterinary Medicine, Medicine and Dentistry

### National Veterinary Prevention Day established

In March 2025 the **National Day of Veterinary Prevention** was established, in order to raise awareness of the importance of prevention in the veterinary field and role of veterinary medicine in protecting public, animal and environmental health, according to the principles of the One Health approach. It will be celebrated annually on 25th January, the day the World Organisation for Animal Health (WOAH, formerly OIE) was founded.

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<sup>19</sup>Text by ANMVI – the Italian National Association of Veterinarians

## PET NUTRITION AS A LEGALLY RECOGNISED ELEMENT OF WELFARE<sup>20</sup>

The current European legislature, like the previous one, is moving forward with a proposed Regulation formulated in 2023 by the European Commission (Proposal for a Regulation of the European Parliament and the European Council on the welfare of dogs and cats and their traceability - COM (2023) 769 final).

This proposal, the first ever in European law, introduces legislative principles for the health and welfare of dogs and cats, which reflect some of the points in the FEDIAF EuropeanPetFood Manifesto. In 2024 FEDIAF called on policy makers to protect the dietary welfare of the 340 million pets in Europe.

The Commission text (COM (2023) 769 final) has the merit of also **explicitly contemplating the needs of animals in terms of nutrition**. The Commission acknowledges the proven scientific value of the "five domains" concept related to animal welfare (nutrition, physical environment, health, behavioural interactions and mental state). It introduces the principle that "dogs and cats must be provided with water and feed of a quality and quantity that ensures they receive the proper nutrition and hydration".

Dogs and cats must receive food in line with their dietary needs

The scope of this proposal, although mainly oriented to commercial activities, also takes into account the principle of proper nutrition for dogs and cats housed in shelters and living with families, to make pet owners aware of their responsibilities.

The ENVI Committee, in the amendments phase, further stressed the concept of "dietary needs", as a parameter of responsible pet ownership.

For the Italian National Association of Veterinarians (ANMVI) - which supported the Commission's proposal in 2023 - this represents a milestone in legislation for the traceability and health of dogs and cats. The Commission - which is assisted in its legislative work by the Standing Committee on Plants, Animals, Food and Feed (formerly Article 58 (1) of Regulation (EC) No. 178/2002) - requires that dogs and cats be administered not only "*feed free of substances that may cause suffering*", but also "*feed that guarantees the proper functioning of the gastrointestinal system*" and "*in sufficient quantity and quality to meet their physiological, nutritional and metabolic needs (...) in the context of a diet suited to the age, breed, category, level of activity and state of health of dogs and cats*". All this requires Veterinarians to be equipped with specific professional knowledge when dealing with breeders, economic operators and pet owners.

### From homemade concoctions to food poisoning

While 99% of industrial pet food is in compliance with the food safety criteria set by European and national legislation, **homemade concoctions** - the legacy of substandard pet ownership - **represent a significant risk for pets**, and indirectly for human health too. Indeed, giving pets raw food, including raw meat, as can happen with "do-it-yourself" solutions, or kitchen leftovers and/or waste derived from rural activities, has always been an element of concern for Veterinarians.

The World Organisation for Animal Health (WOAH) also warns against giving pets food without guarantees or traceability, not treated to render it safe for human and/or animal consumption, and not checked by health authorities. Unsafe food can contain bacteria, viruses, parasites or harmful chemicals. Overall, WOAH estimates that substandard food can cause more than 200 diseases, including diseases that can be transmitted to humans.

To protect dogs and cats against the risk of contracting food poisoning, the recommendation is to feed them only safe, hygienically guaranteed food. **Homemade concoctions should be avoided**, as should **leftovers** (from meals or rural activities), which can seriously compromise the principles of healthy nutrition for dogs and cats, and those of the One Health approach, as we will explain in the following section.

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<sup>20</sup> Text by ANMVI – the Italian National Association of Veterinarians

### The sustainability of the supply chain

It cannot be overstated that the industrial pet food supply chain is a significant example of "circular economy". In addition to being compliant with standards regarding sustainable and recyclable packaging, **the pet food industry uses the by-products of the food chain intended for humans**. The ingredients used by the pet food supply chain (such as offal like heart and lungs) therefore fulfil standards of safety and hygiene applied to food for humans, but are no longer used for humans due to changes in eating habits in Italy or for commercial reasons.

### Social and economic implications

The first Veterinary Expenses Fund has been established, having recently been included in the Ministry of Health Budget. It is a set of innovative measures that have the merit of starting the conversation on household spending. For ANMVI, tax breaks remain the most effective measure, albeit the most complex. It hopes to see three measures introduced 1) **a reduction in the VAT rate on pet food and veterinary services**, bringing it down to the subsidized rate; 2) **an increase in tax deductions** for veterinary expenses, and 3) **animal health insurance policies** becoming a tax-deductible expense. This proposal was placed on the agenda (no. 9/2112-bis-A/53) by the Hon. Caretta and Hon. Ciaburro and approved by Parliament, then accepted by the Ministry of Economy and Finance during the 2025 Budget Law. It commits the Government: to "evaluate the opportunity to modify the VAT tax regime" with regard to both veterinary services and pet food.

### Pets and the law

The social role of and companionship offered by pets is acknowledged in case law. More and more frequently, judges are presiding over cases involving the death of a pet, and recognising the non-pecuniary damage caused, more simply referred to as moral damage. The loss of a pet, for both adults and minors, is increasingly characterised as damage pertaining to a right, *namely the right to maintain the relationship with one's pet, which is one of the inviolable rights of the person* (Court of Turin, ruling published on 15<sup>th</sup> January 2025). Moreover, the loss of a companion animal may damage a person's best interests in terms of preserving their relational-affective sphere, something which is protected by Article 2 of the Italian Constitution, in so far as the relationship between the owner and said animal represents an opportunity for the completion and development of the individual's personality: (Court of Prato, ruling 51, Civil Section of 25<sup>th</sup> January 2025).

It follows that Veterinarians play an increasingly important role in safeguarding people's relationship with a pet, not just from a purely medical/health-related point of view, but also in terms of the mutual well-being of the pet and its owner/family.

## RESPONSIBLE PET OWNERSHIP IN 2025<sup>21</sup>

Though Italy is a pet-friendly country which permits dogs and cats to access multiple public places, in terms of managing day to day life with a pet in the family, there is still **room for improvement**. Guaranteeing **responsible dog and cat ownership**, on an individual and social level, **calls for a new look** at forms of education to ensure that our collective coexistence with pets runs smoothly. The educational work that the vets of ANMVI have been carrying out in schools for over a decade is an example of proactive awareness-raising of the correct approach to animal otherness. The rising popularity of pets, and dogs in particular, prompts a reappraisal of the "dog license" concept, which would entail education on responsible ownership for owners and potential owners, with pre-adoption veterinary appointments to help the future owner choose the right dog, cat or other pet.

A review of the educational element could help prevent uncontrolled aggression in dogs, a phenomenon that should not be attributed to the dog, but to the absence of effective prevention measures and awareness among owners. To quote the Supreme Court: "The danger represented by the animal is not presumed, but inferred from a series of conditions that make them dangerous if not properly kept". The failure of owners to supervise dogs properly has been rightly identified as being in breach of a precautionary principle, which is less related to the breed of the dog in question and more to do with the lack of precautionary measures applied by its owner. (Supreme Court, Fourth Section, ruling no. 9620 of 10th March 2025). The launch of the National Companion Animal Identification System (SINAC) currently being implemented by the Ministry of Health will - thanks to the cooperation of the regional authorities and the data supplied by vets - enable episodes of canine aggression (biting, serious/fatal events) to be quantified and qualified, allowing for targeted, statistically backed regulatory interventions.

Dog licenses:  
time for a rethink

### Dogs and children: living together safely calls for awareness, education and prevention

The Italian Society of Paediatrics (SIP) and ANMVI have signed a joint appeal to draw attention to the importance of responsible dog ownership in the presence of minors. The collaboration between paediatricians and veterinarians came into being in the light of recent news stories involving children being attacked by dogs, often in the home and in the absence of adult supervision. This calls for a reappraisal of the current prevention and education policies.

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<sup>21</sup> Text by ANMVI – the Italian National Association of Veterinarians

