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# The Italian pet market overview

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**ZOOMARK** 5–7  
May 2025

# TOPICS



Pet population in Italy

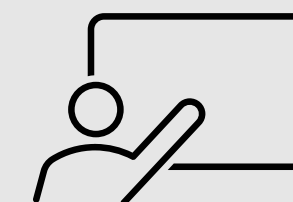
The Italian pet owner

The market size

Sales channels

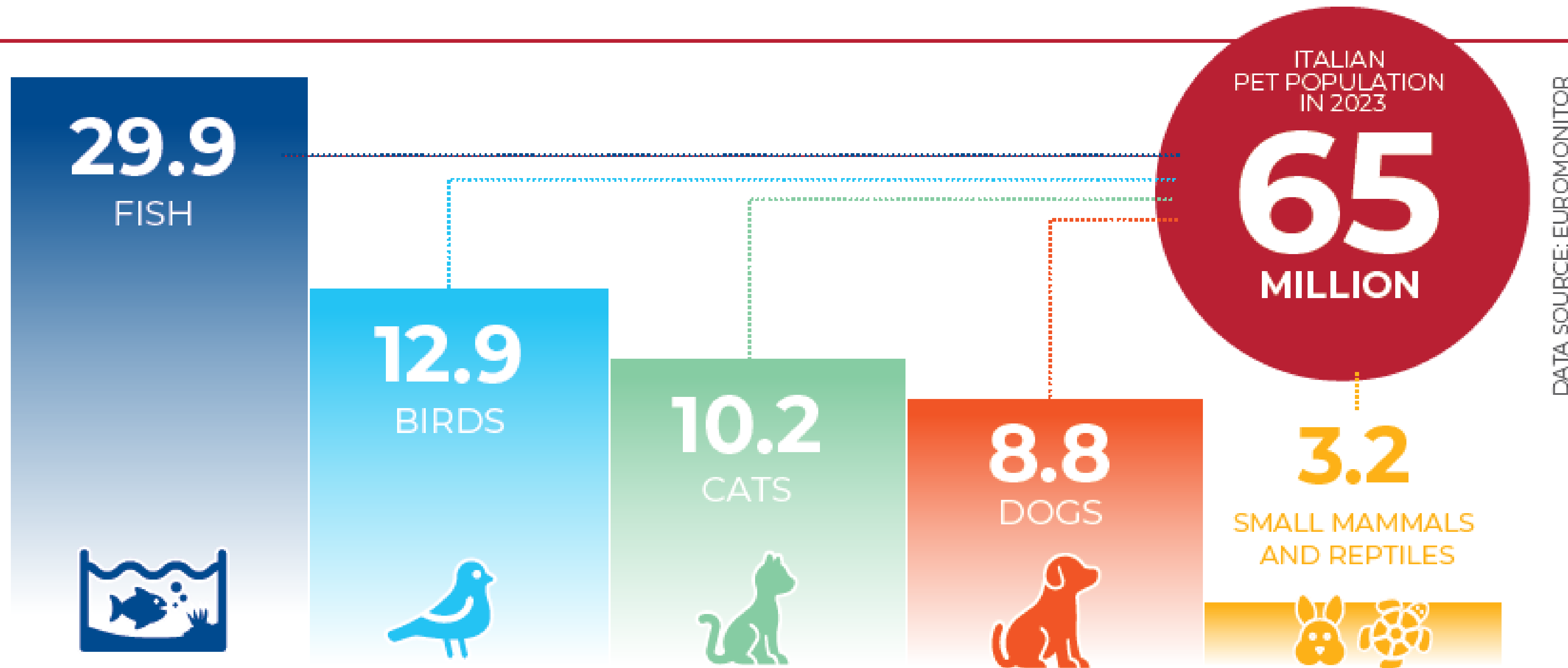
Future trends and forecasts

# The pet population in Italy

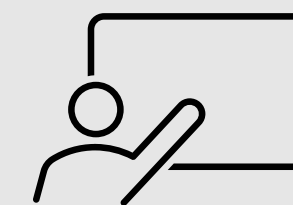


# Pet population in Italy

## 2024 ASSALCO ZOOMARK REPORT PETS: POPULATION AND MARKET



# The Italian pet owners



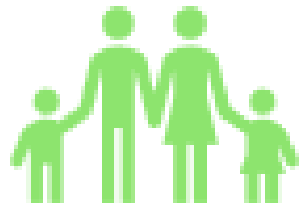
# The Italian pet owners

## ITALIAN PET OWNER IDENTIKIT



Age  
**> 45 YEARS**

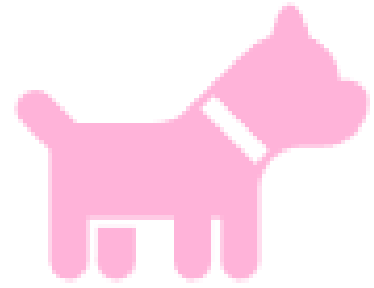
**47%**



Household  
**FAMILY WITH COHABITING CHILDREN**

**43%**

### Animal on which pet expenditure focuses



**DOG**

**52%**



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



### House type

**HOUSE WITH OUTDOOR SPACE**

**89%**

i.e. garden or balcony

### Lifestyle

Conscientious and balanced

**19%**

Urban

**10%**

Global and curious

**10%**

Sustainable

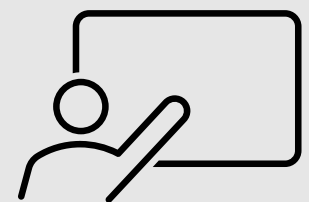
**10%**

Active life

**9%**

Percentages refer to the entire sample.

Source: Nomisma survey on Italian pet owners





# The Italian pet owners

Dog owners spend about **€1,000 annually**

Cat owners spend **€600 annually**

Sustainability is a priority for **46% of pet owners**

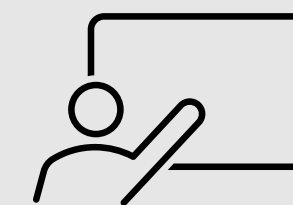
Italian **Gen Z** consumers record highest average spending.\*

Spending in pet products is **expected to grow** in the next 3-4 years

Source: Nomisma's research for Zoomark 2024; \*online bank N26's Research 2024



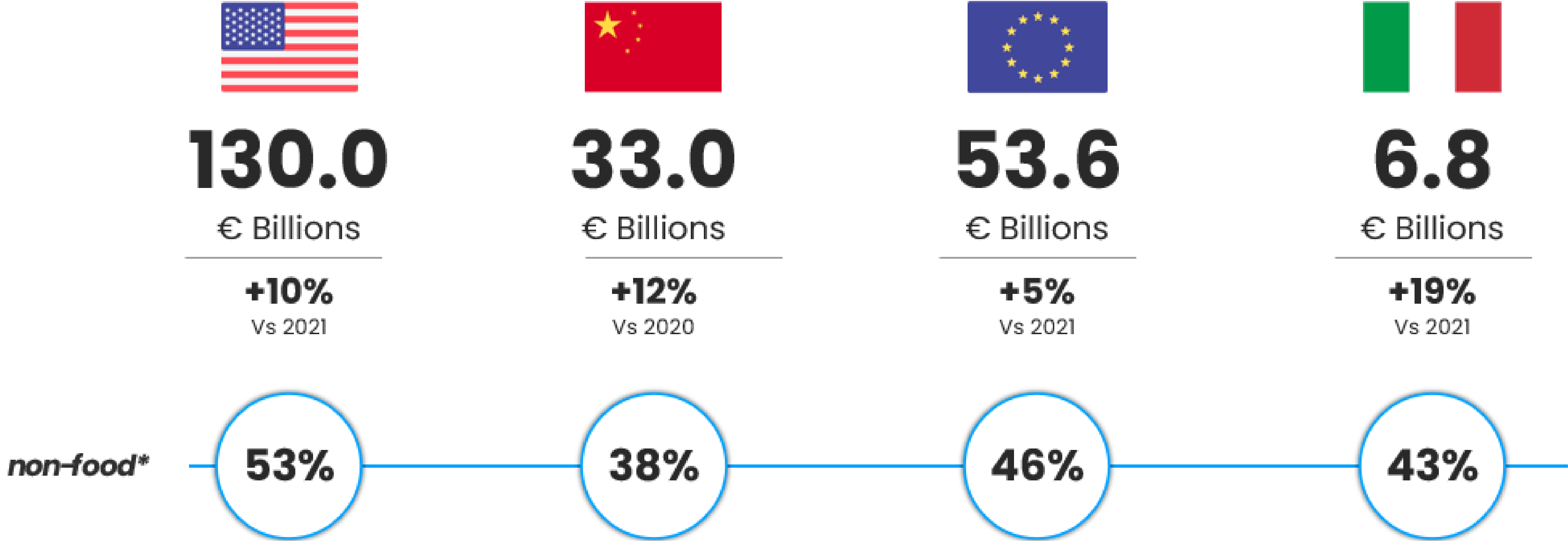
# The vibrant Italian market



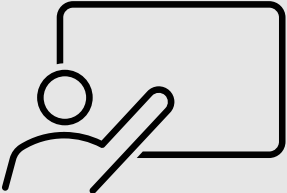


# The vibrant Italian market

Total expenditure on pets in 2022



Source: Nomisma analysis on data from American Pet Product Association, Statista, FEDIAF and Istat. Note: for China the figure refers to 2021. (Exchange rate EUR/USD 2022 = 1,052; EUR/Yuan 2021 = 7,576)  
\* Non-food refers to spending on everything that does not belong to the food category (accessories, medical expenses, other)



# The vibrant Italian market

In the last five years, the Italian pet products market has been constantly expanding at a rate of **4-5% annually**.

## Key drivers for growth

- **Increase in pet population**
- **Premiumisation**
- **Humanisation**

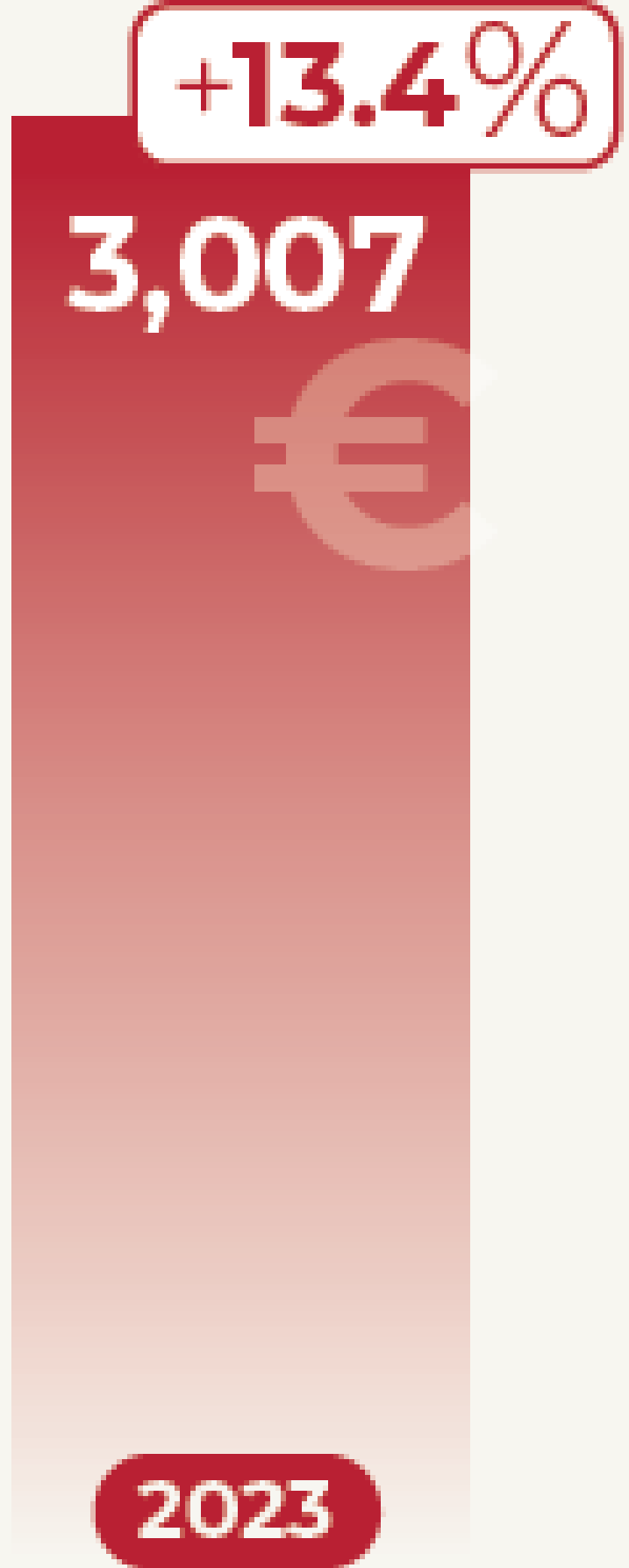
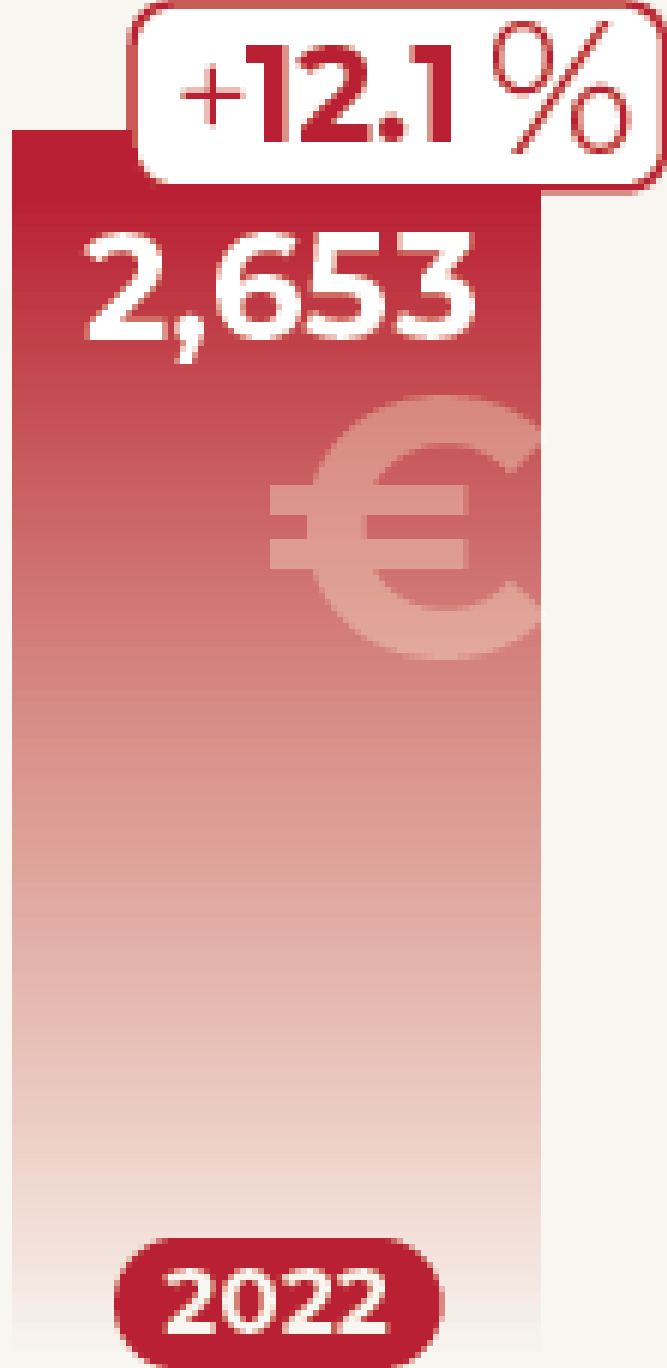
Source: Nomisma's research for Zoomark 2024



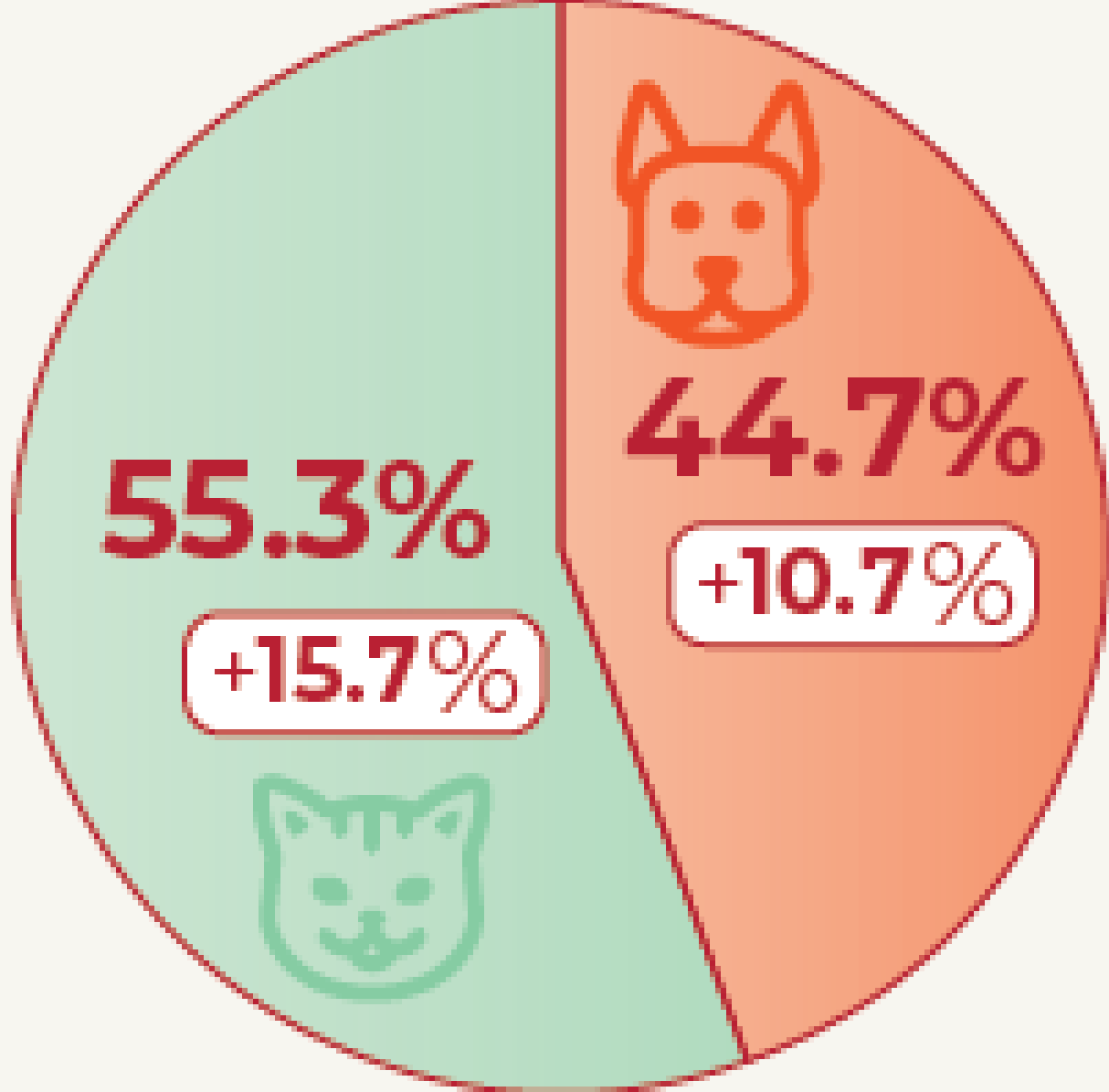
# The vibrant Italian market

## ITALIAN MARKET IN 2023

DOG AND CAT FOOD\*

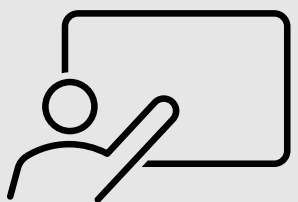


TOTAL MARKET



\*Grocery Channel + Specialised (Traditional + Chains + large-scale retail Petshops)

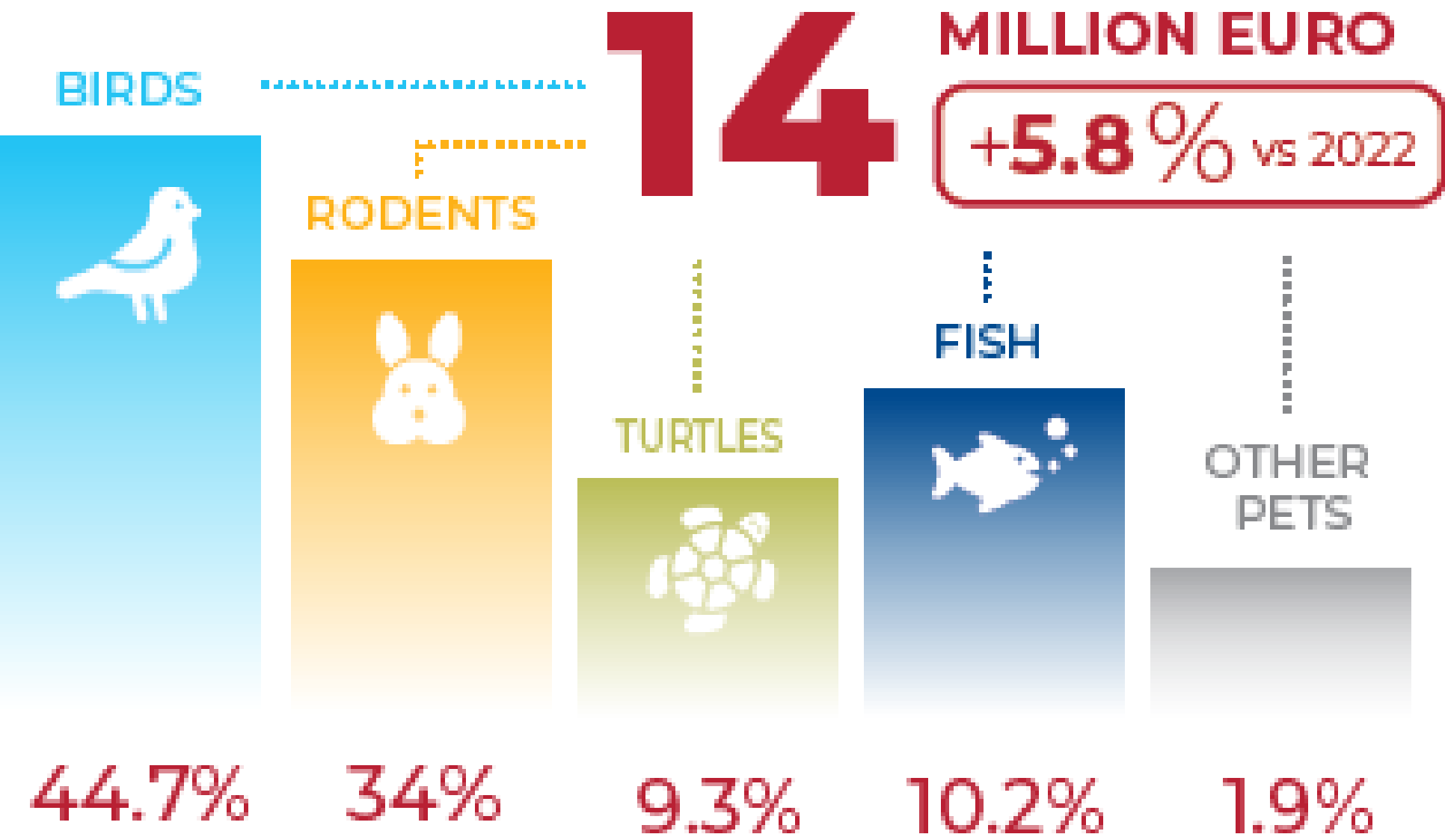
Assalco Report – Zoomark 2024 – Source : Circana



# The vibrant Italian market

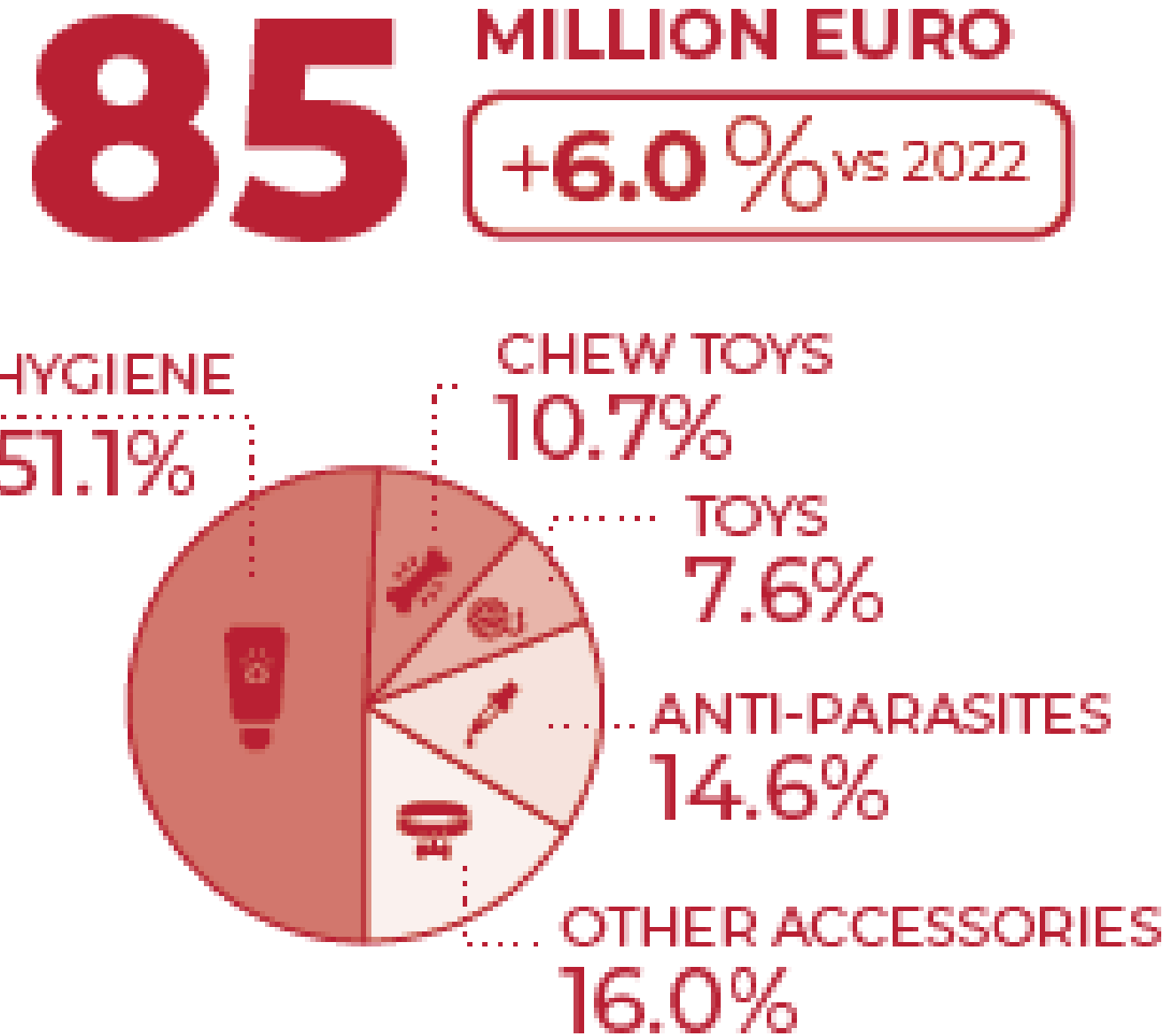
## OTHER PETS FOOD

Small pets food market in Italy in 2023 (large-scale retail)



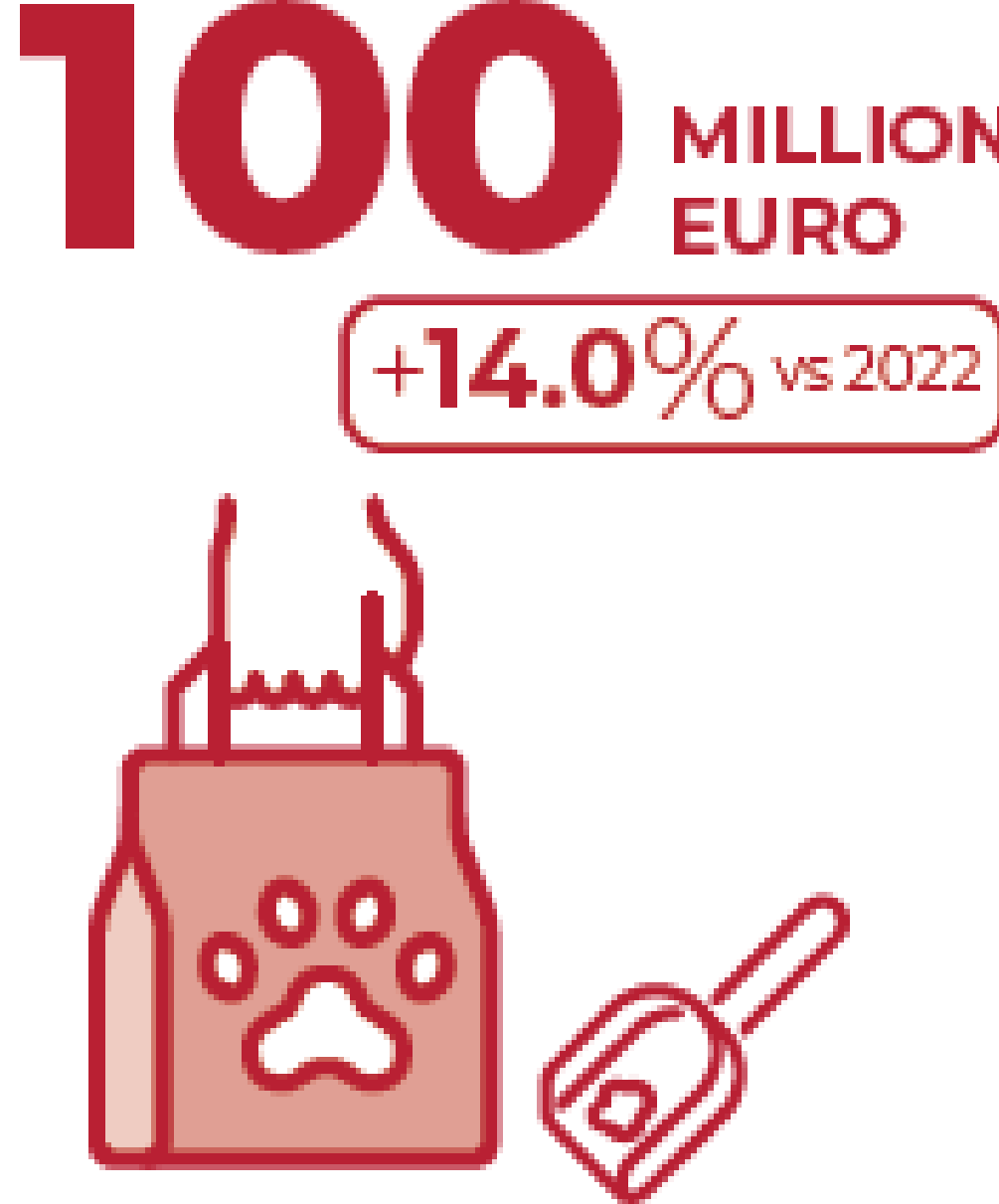
## ACCESSORIES

Accessories market in Italy in 2023 (large-scale retail)



## CAT LITTER

Cat litter market in Italy in 2023 (large-scale retail)



Assalco Report – Zoomark 2024 – Source : Circana



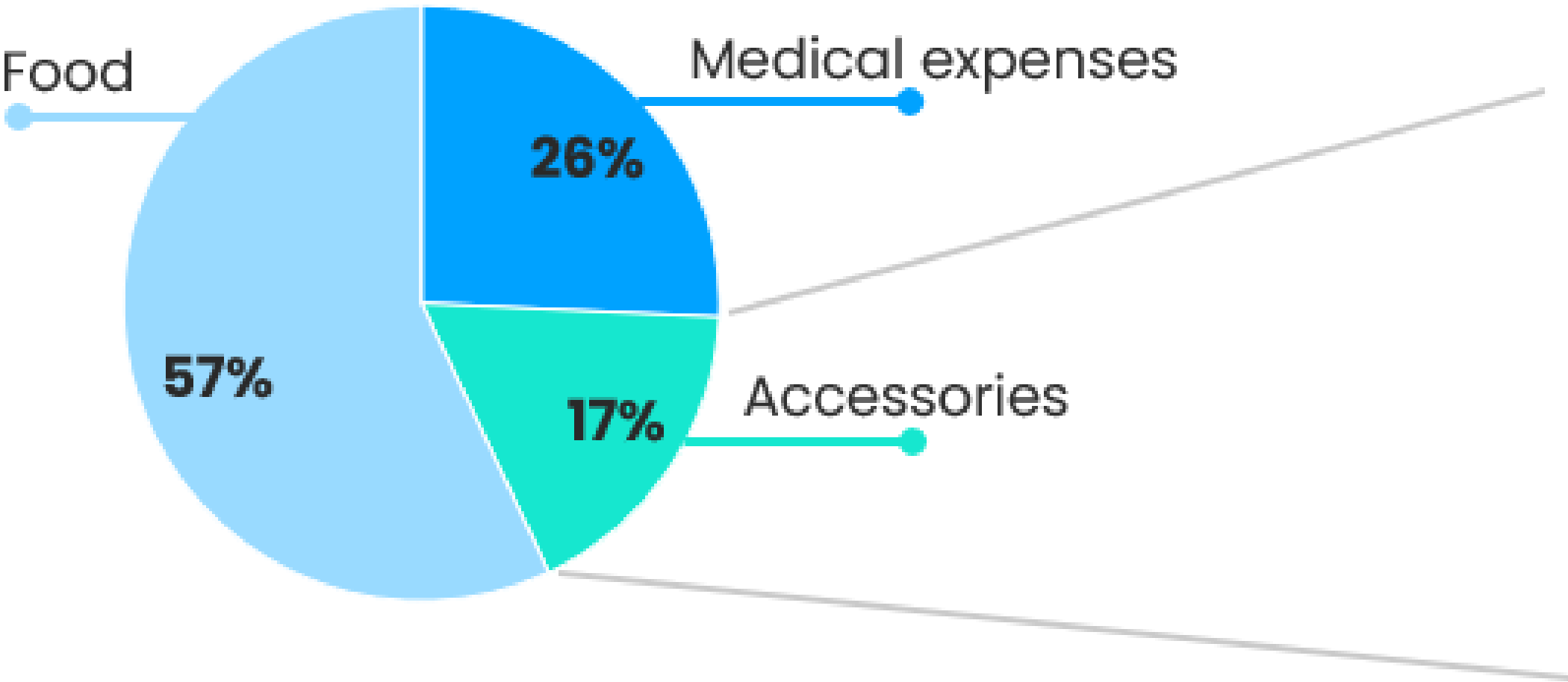


# The vibrant Italian market

## THE NON FOOD MARKET

**6.8**  
€ Billions

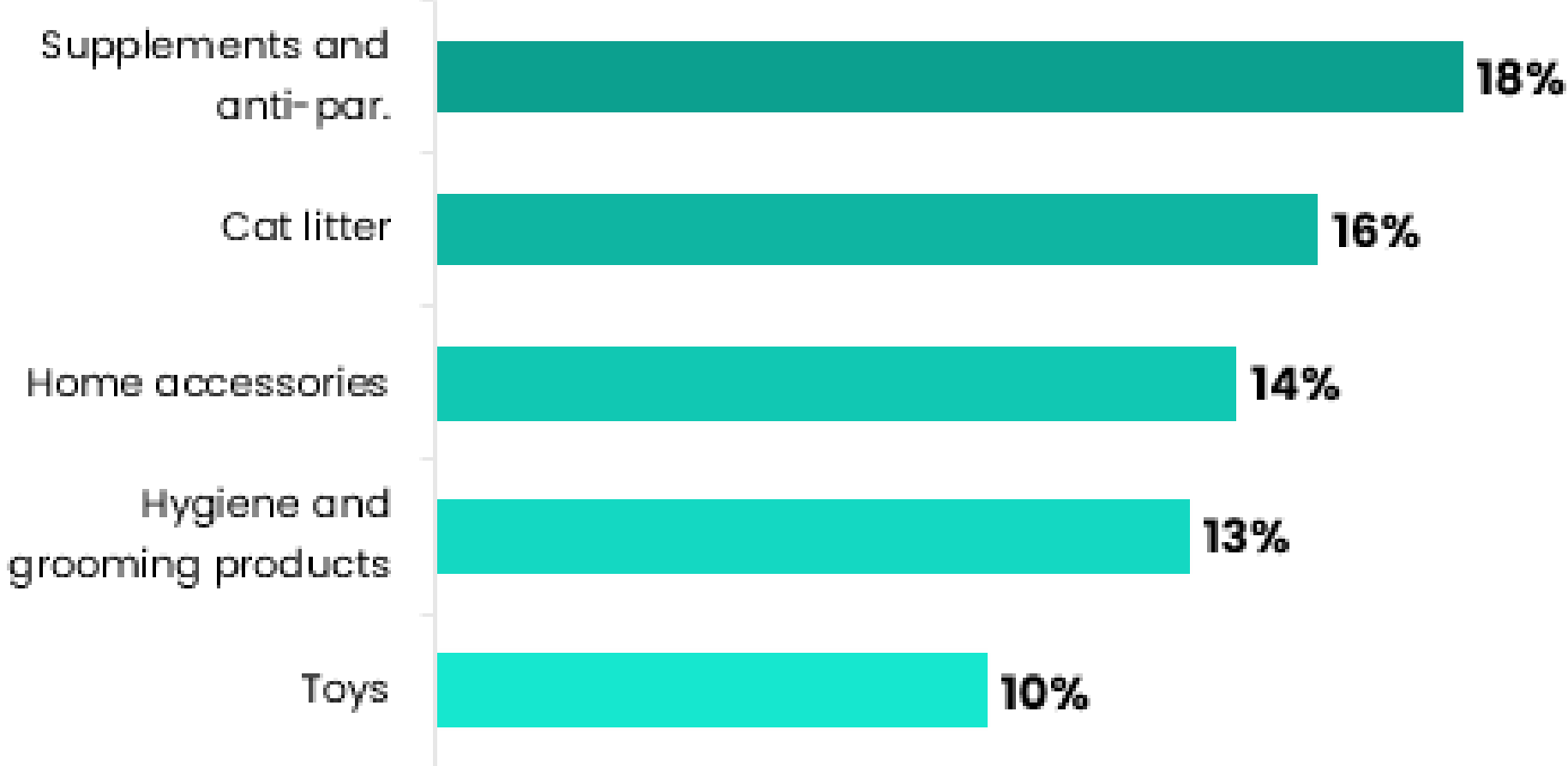
Expenditure by Italian households on their pets (in 2022)



**1.2**  
€ Billions

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

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



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

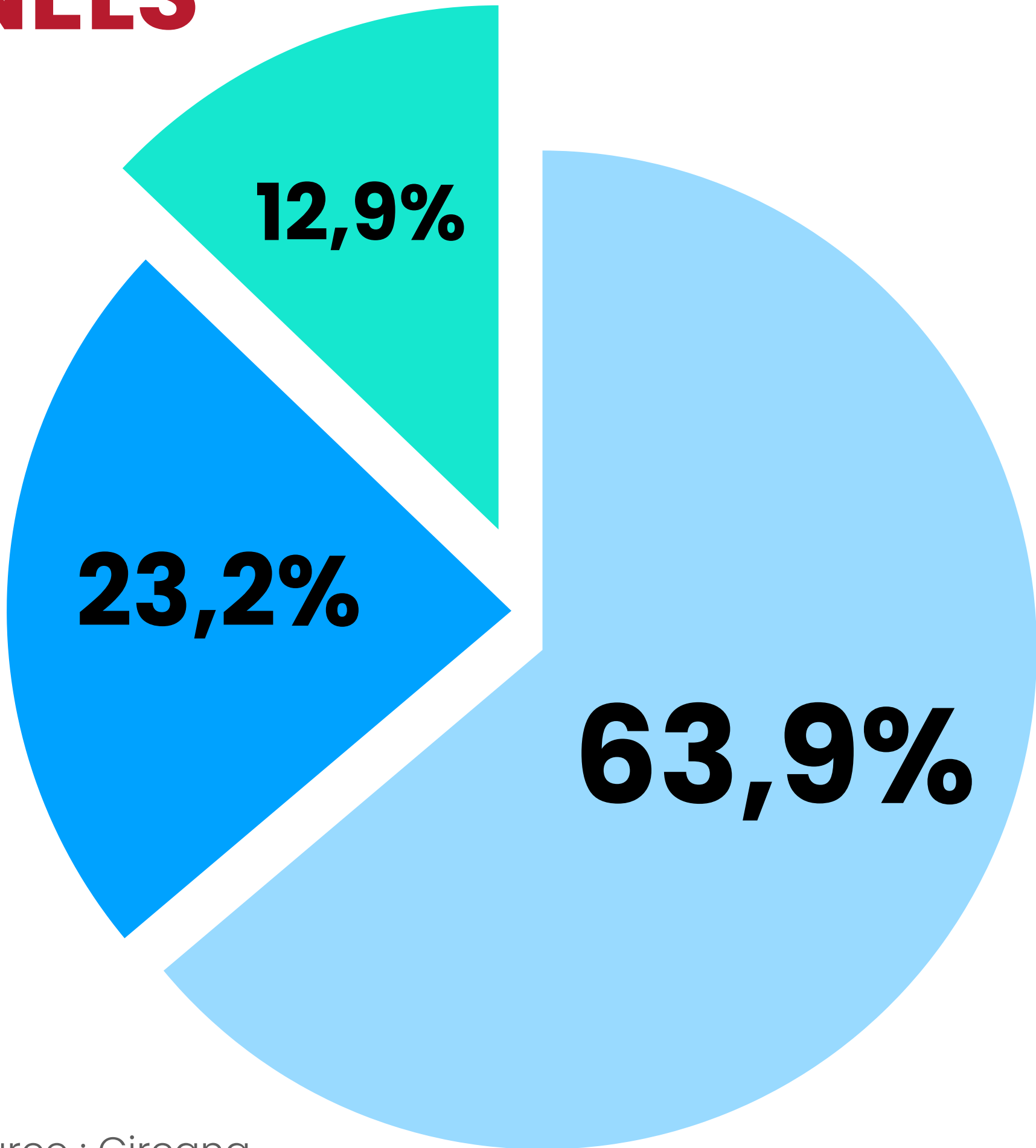
\*Expenditure in the last 12 months. Expenditure categories not reported include transport accessories, leashes and muzzles, clothing and electronic equipment.

# The vibrant Italian market

## SALES CHANNELS

### Brick and mortar

- Pet shops
- Specialized chain stores
- Supermarkets and hypermarkets

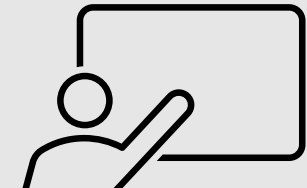


### E-commerce platforms

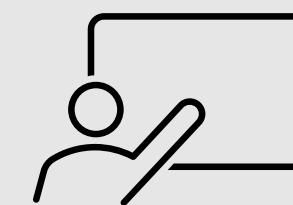
E-commerce platforms are gaining popularity, with many companies adopting omni-channel approach

The first Italian pet-dedicated portal is **Zooplus**, followed by **Arcaplanet**

Assalco Report – Zoomark 2024: Source : Circana



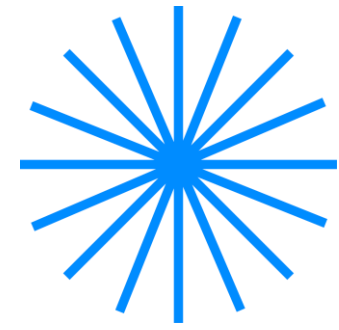
# Forecasts



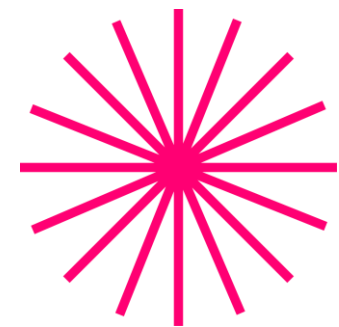
# Forecasts

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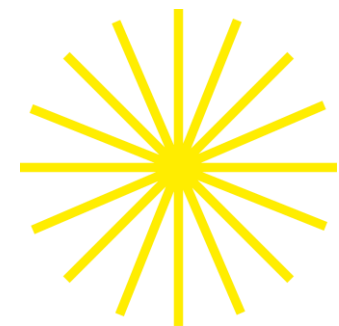
## Global market value



The global **pet care market** is expected to reach **€191.2 billion** in 2024, with an annual growth of **4.7%**



The **pet food** segment will see a **5.3%** growth by the end of the year (2024) and reach **€140.2 billion**



The segment of other pet products is expected to account for **€50.9 billion** in 2024, with a significant growth of sales of **hygiene, healthcare** and **accessories**

Source : Euromonitor International



# Forecasts

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## Key trends in Italy

### **Sustainability**

Growing interest in products that align with pet owners' environmental and ethical values

### **Health and wellness**

Surge in the demand for products that prioritize pet health, wellness and longevity

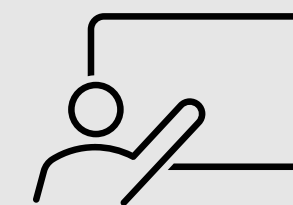
### **Technological innovation**

Search for technological solutions that support responsible pet ownership and improve pets life

### **Personalization and customization**

Rise in consumer expectations, demanding personalised solutions to their pets' specific needs

# Future scenarios





# Future Scenarios



## Awareness



Sustainability and eco-friendly pet products

Holistic health and wellness

Aging pet population and senior pet care

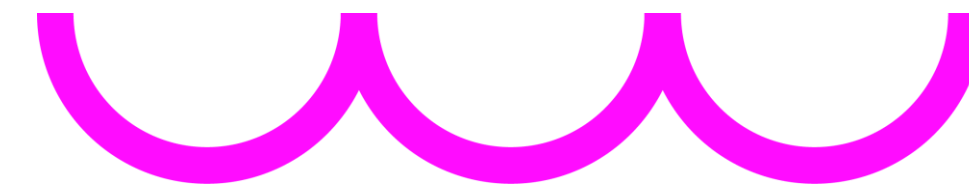
Ethical and social responsibility



# Future Scenarios



## Technology

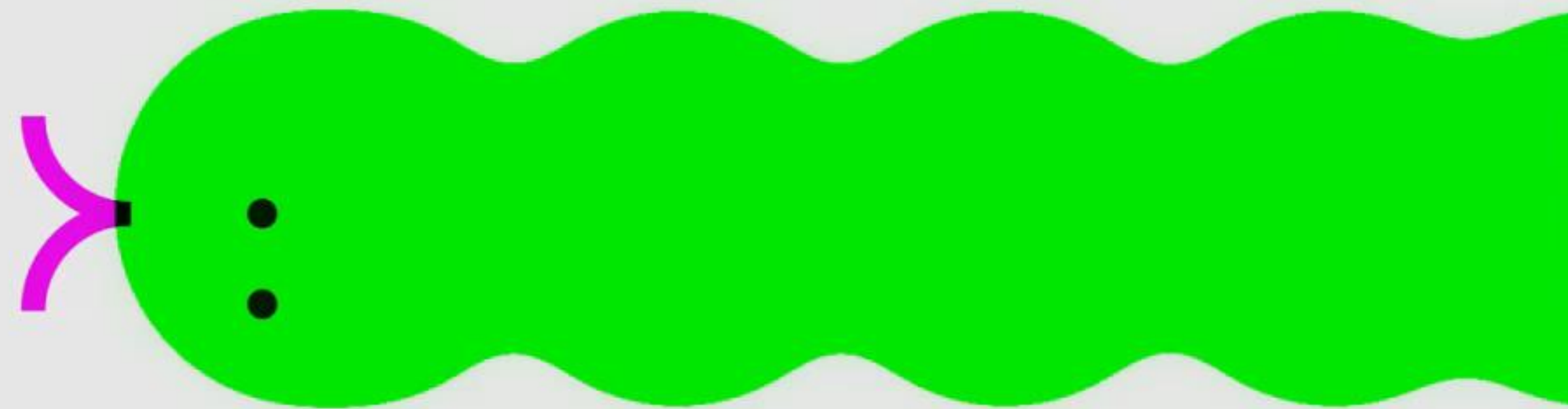
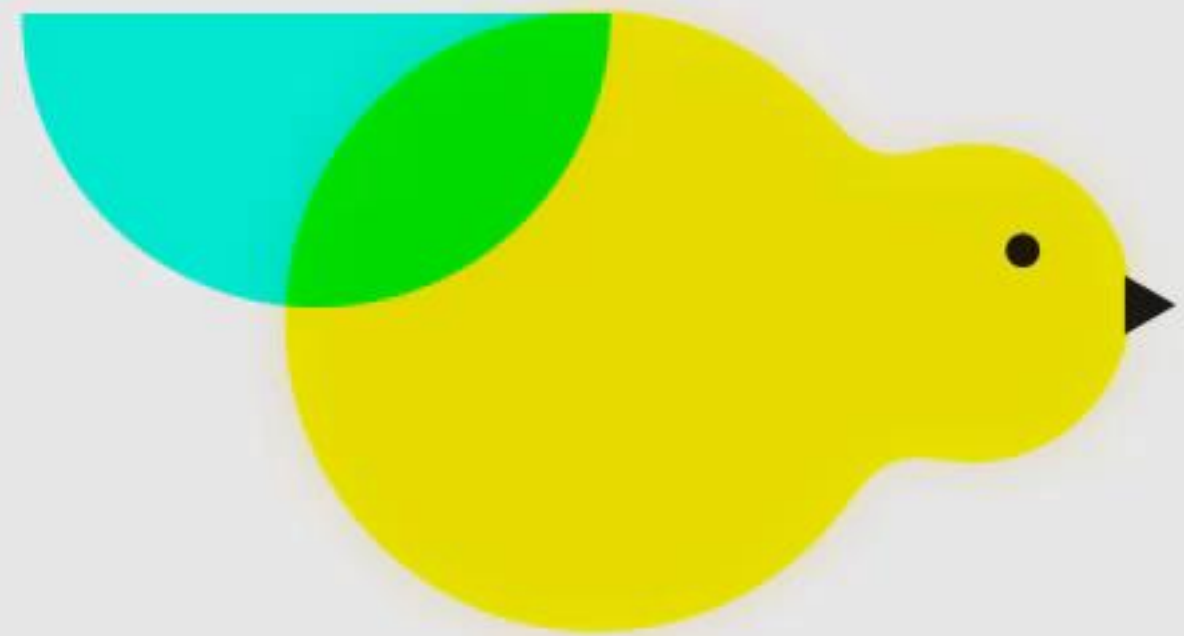
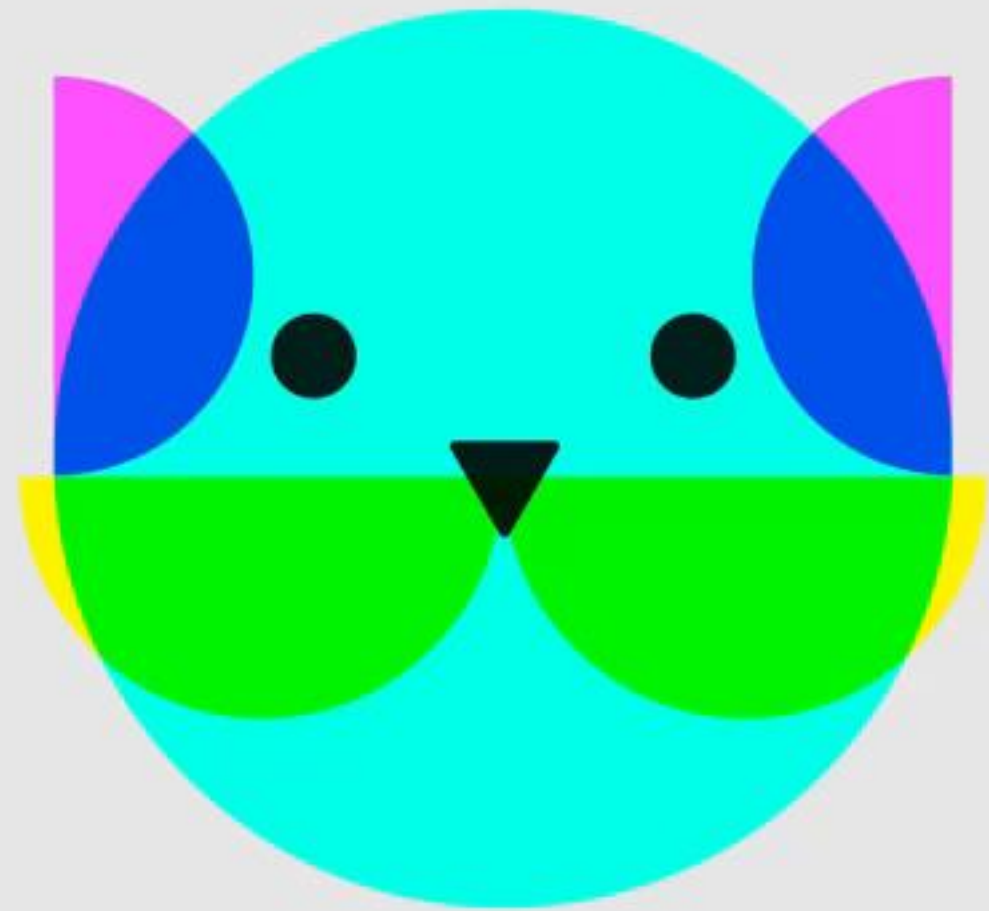
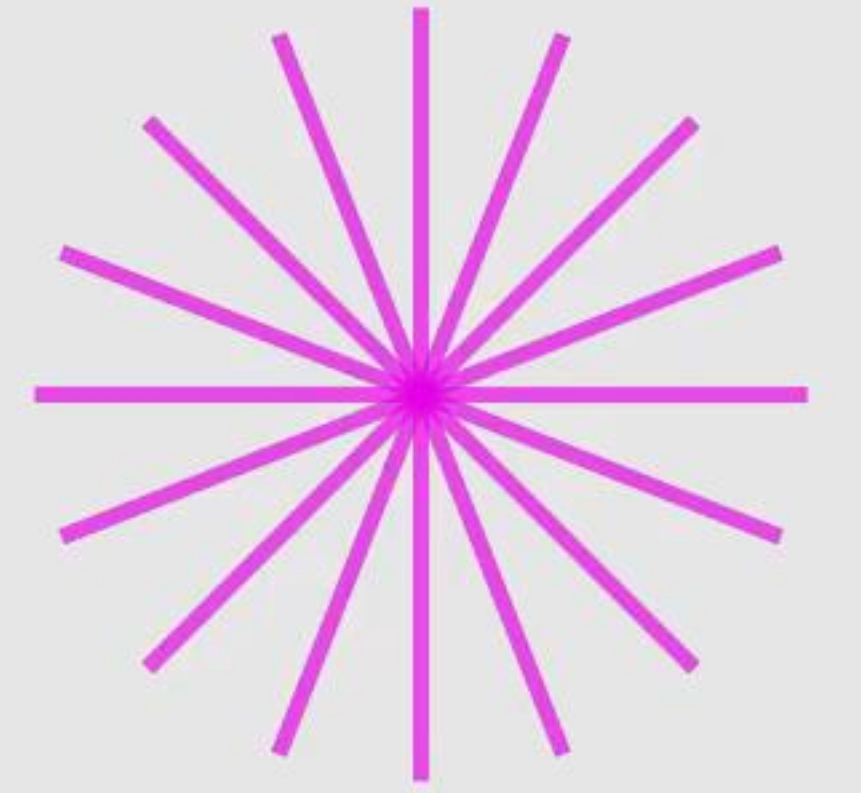
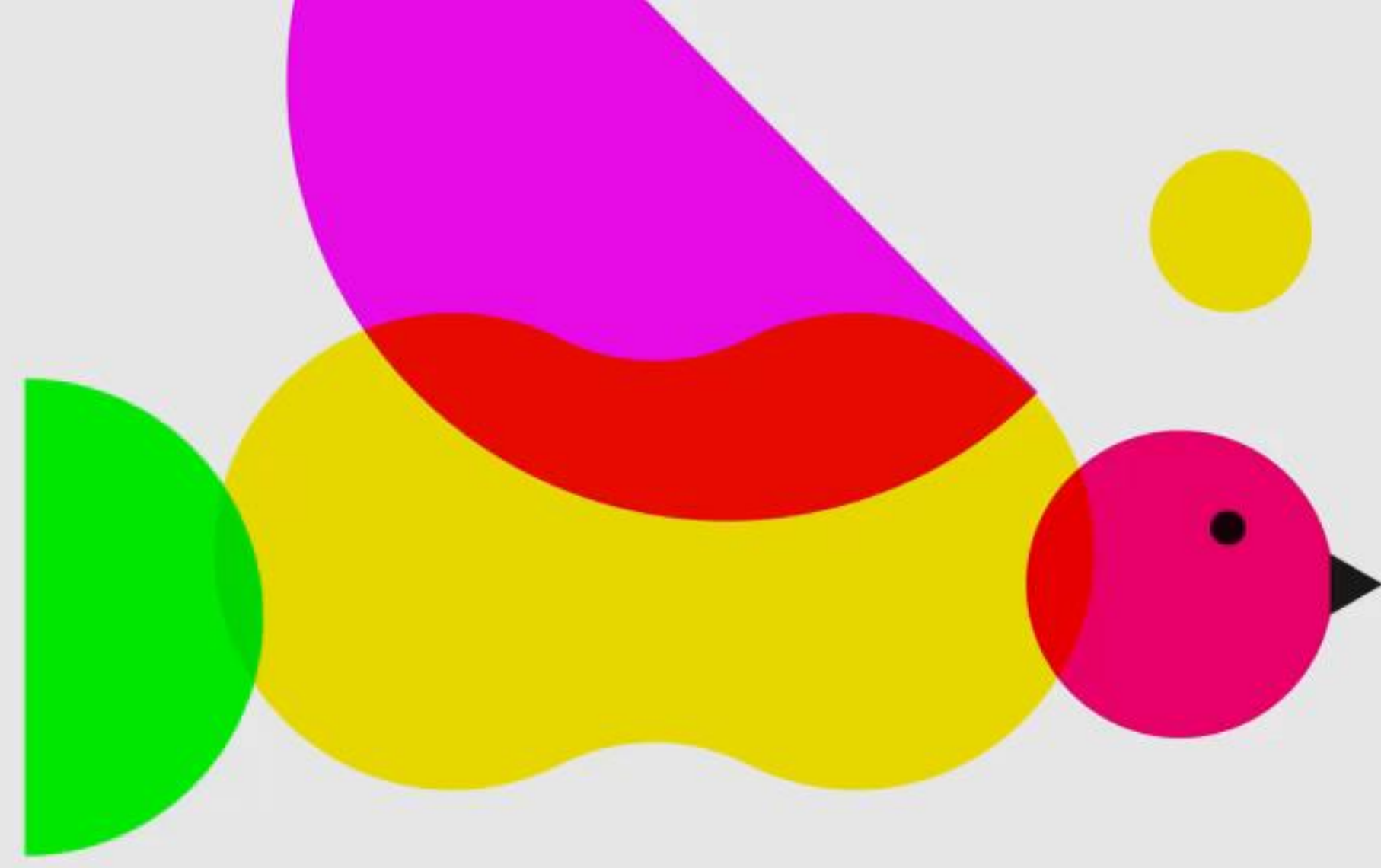
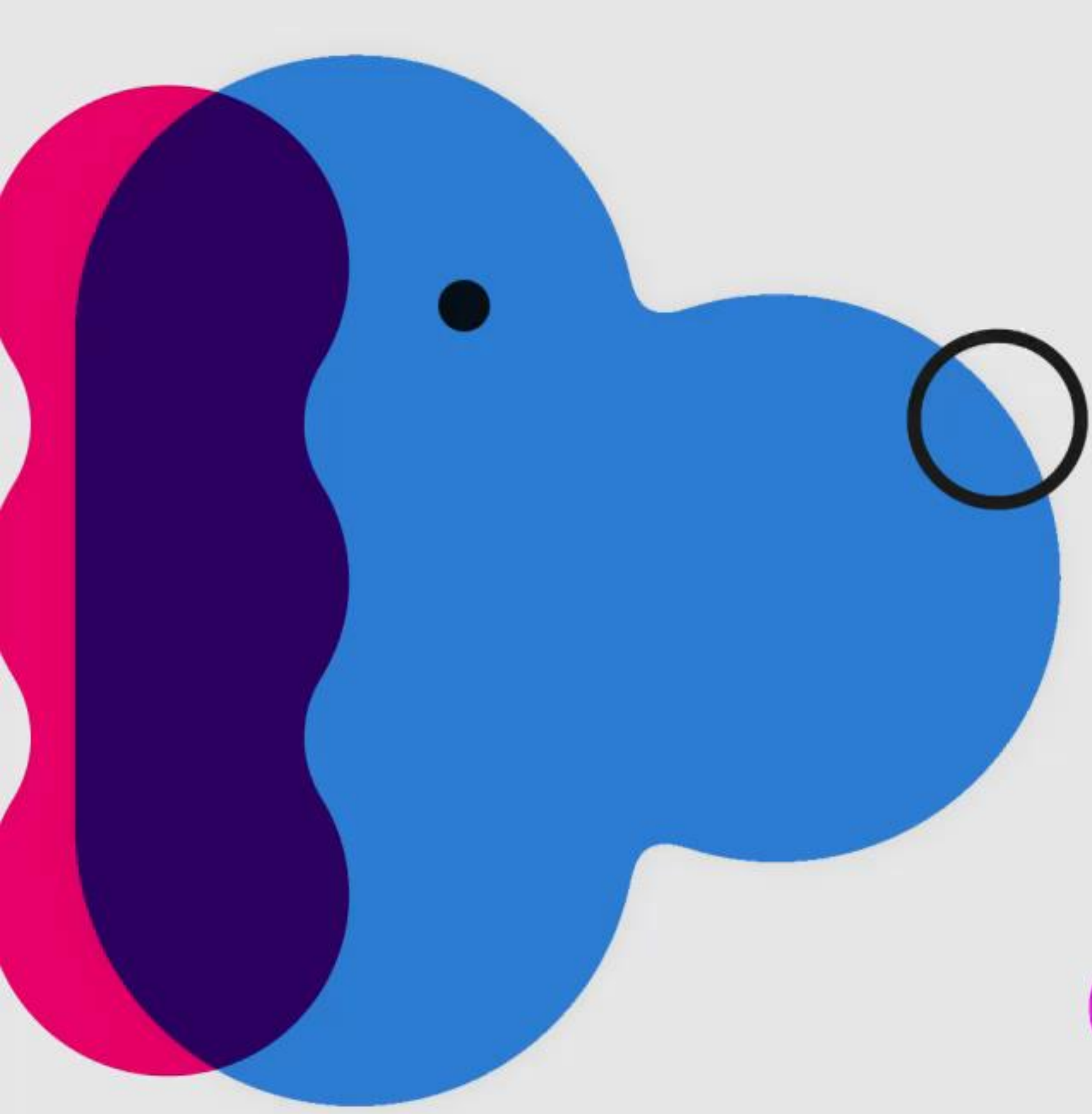


Technological integration and smart pet care

Personalisation and hyper-customisation

Pet care as a service







# ZOOMARK

5–7 May 2025  
BolognaFiere, Italy

## A boost for your business in Italy and worldwide!

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### 2023 RECORDS

1,060

Exhibitors

From  
57 Countries

25% Italian

75% foreign

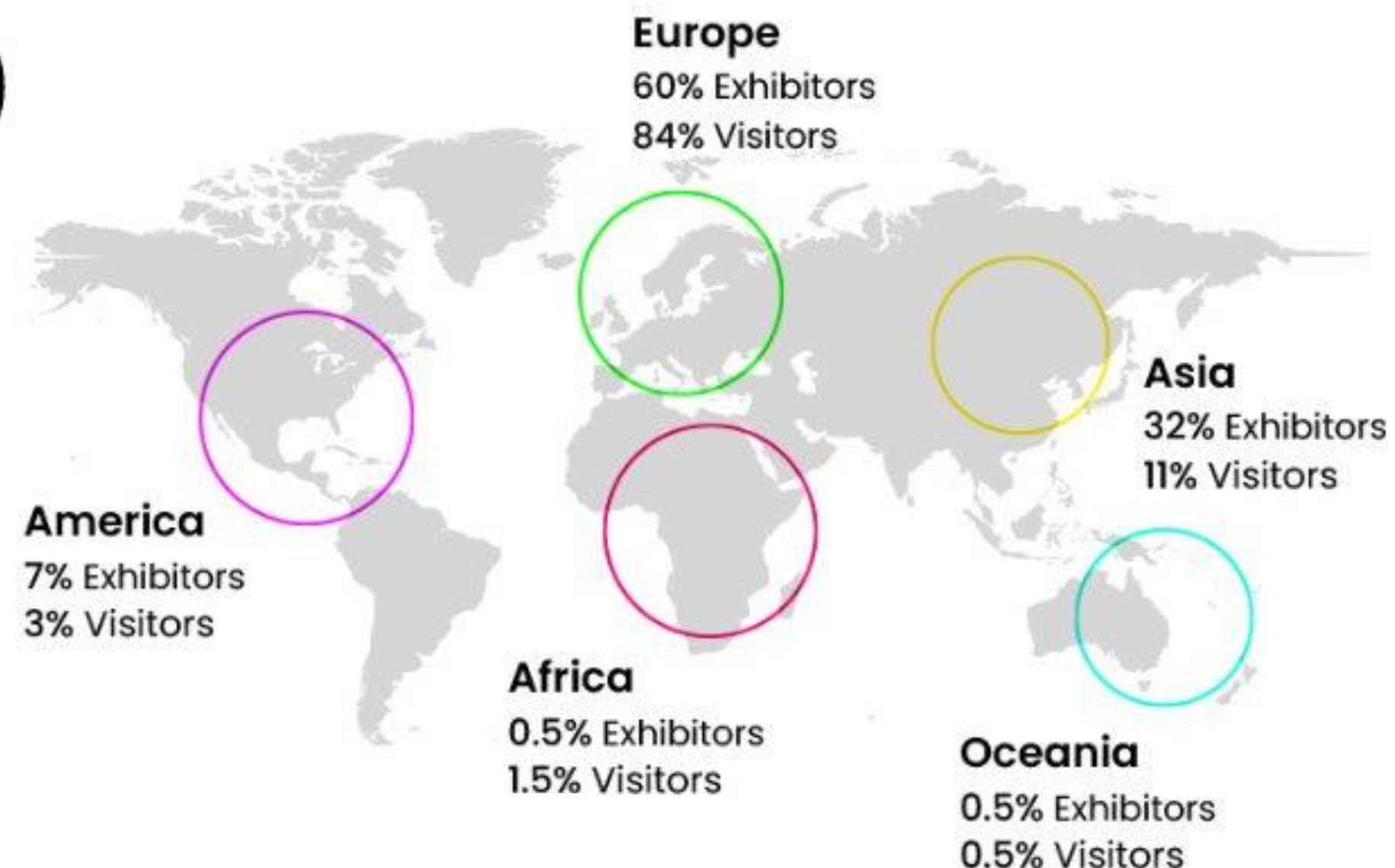
27,950

Visitors

From  
120 Countries

38% Italian

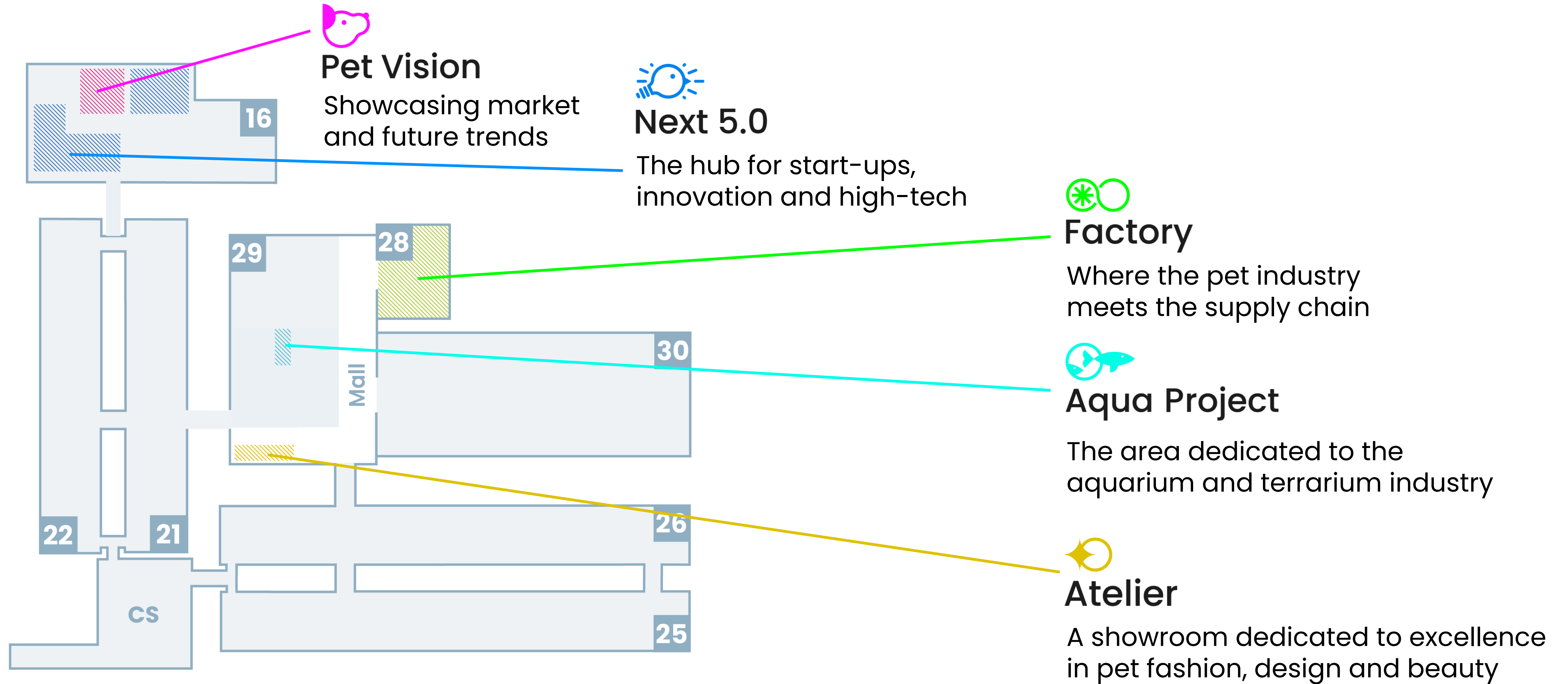
62% foreign



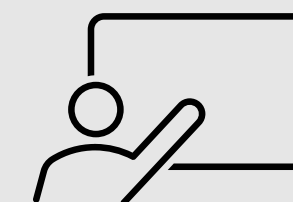
Its global appeal  
and high-profile  
audience will offer  
you priceless  
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opportunities.



# Zoomark 2025 Special Areas



# Opportunities





Zoomark 2025

# ZOOMARK 2025 › The place to be

A modern, lively and engaging global meeting platform

Conferences, round tables and seminars

Networking opportunities

Combination of business and leisure

Bologna  
Italy





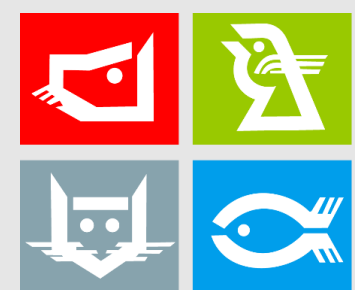
See you in Bologna

Thank you!

Pascale Sonvico

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**ZOOMARK**

**5–7 May 2025**

BolognaFiere, Italy