

## **South America Pet Food Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)**

Market Report | 2023-01-23 | 110 pages | Mordor Intelligence

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### **Report description:**

The South American pet food market is projected to witness a CAGR of 5.3% during the forecast period.

#### Key Highlights

These countries' rapid economic and social changes are leading to increased urbanization, high-income growth, and a solid aesthetic sense among consumers. Due to a rise in this humanization trend, owners are becoming increasingly aware of pet health, nutrient uptake, and overall wellness. The general population is aware of the health concerns associated with the ingredients used, the aversion towards pet food containing steroids, and the traceability of the products is increasing. This trend is pushing pet food manufacturers to improve product quality and sourcing.

According to International Trade Center data, pet food imports to South America reached 10.6 million metric tons in 2021, a 30.8% increase from 2017 imports. Chile, Mexico, and Columbia are significant importers of pet food. Regarding exports, Argentina and Brazil are the top exporters of pet food. In 2021 Argentina accounted for almost 29% of the total export quantity from South America.

Brazil is one of the largest markets for pet products. Demand for pet food, especially packaging that stands out for its sustainability, functionality, and food safety guarantees, is expanding. Manufacturers are capitalizing on this situation and differentiating their products on these lines, with natural and ethically sourced products being a major hit.

South America Pet Food Market Trends

Pet Humanization Resulting in Higher Demand for Pet Food

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The growing bond between pet owners and their pets shapes consumers' willingness to spend more on pet food. Consumers are now becoming aware of their pet's health and are mainly buying premium pet food with rich nutritional value for the betterment of their beloved pets. Nowadays, pet owners are not just looking for primary food products but also for pet consumables that are locally produced and natural or have specific health benefits.

The increasing number of pets and the affinity toward pets has also increased the demand for pet treats and snacks. Pet owners are looking for nutrition-packed snacks and treat to add to their pet's diets; they often rely on locally sourced and produced organic and human-grade products to ensure the safety and health of their pets.

The Chilean pet care industry benefitted from the humanization of pets and downward birth rate trends and recorded year-on-year growth of over 5% in 2020, per the Agriculture and Livestock Service of Chile. The Chilean government authorized and registered 147 new imported pet food products in the local market in 2021. Of those, about 69% are dog food products, and the remaining are cat food products. Within the premium segment in Chile, Royal Canin Argentina and Royal Canin Brasil are the most active companies, registering 32 new prescription products in the first quarter of 2021, including the VHN veterinary line.

### Brazil Dominates the Market

With the increasing numbers of households with pets in South America and the spiking demand for pet food, Brazil is one of the biggest growing pet food markets in the region. The willingness to spend on pet food is influenced by factors like increasing disposable income of Brazilian consumers, competitive pricing of the products, etc. Brazil's pet food market is constantly evolving to attract foreign buyers and increase exports, by increasing quality and meeting global standard requirements by using new technologies and developing new solutions. The increasing exports from Brazil in recent years have also been a sign of growth in the market, according to ITC data in 2021 the export was 77,060 metric ton a 35% increase from the previous year.

Companies in Brazil like BRF bought all shares of Hercosul Group and started specializing in pet food production and expansion to other regions to address the increasing demand and trend change in the pet food market. Brazilian pet food companies rely on the United States companies for the ingredients for their formulations. According to Instituto Pet Brasil, the share of pet food in the Brazilian pet care market comprises 50%, making the pet food market. The large dog and cat population in the country spurs a sizeable network of retail outlets across the country, supporting the pet food market as a resilient and profitable business.

With the Brazilian pet food market growing and a rise in the demand for innovative pet products, the ingredient suppliers are required to be registered at the MAPA's Department of Animal Production Inspection and Development (DFIP) as a prerequisite for exporting to Brazil. Specialized pet stores are gaining popularity in the country due to the consistent price range offered by these small outlets, unlike the price volatilities of large-scale outlets of major brands. These stores are often involved in producing innovative and naturally and ethically sourced materials, and hence, their dedicated pet food product lines are capturing consumer interest.

### South America Pet Food Market Competitor Analysis

The South American pet food market is relatively consolidated, with the leading players investing in R&D to introduce innovative pet food products to achieve significant market shares. The South American pet food market is dominated by players like Nestle SA (Purina), Mars Inc., Hill's Pet Nutrition, Total Alimentos SA, and Lupus Alimentos.

### Additional Benefits:

The market estimate (ME) sheet in Excel format  
3 months of analyst support

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