

Italy Pet Food - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2017 - 2029

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Report description:

The Italy Pet Food Market size is estimated at USD 4.54 billion in 2024, and is expected to reach USD 5.57 billion by 2029, growing at a CAGR of 4.17% during the forecast period (2024-2029).

Dogs held the major share due to the significant transition from home-cooked food to commercial food and the increased expenditure on dogs

- Pets in Italy are an integral part of many households. Italians have a deep affection for their pets, resulting in a growing market for pet food products and services. As a result, the pet food market's value increased by 16.7% between 2017 and 2022, driven by a parallel increase in the pet population of 17.3% during the same period.
- In Italy's pet food market, the dog food segment held the largest market share, valued at USD 1.72 billion in 2022. This could be attributed to the increased number of dog owners shifting from home-cooked food to commercial pet food in the country, along with the increased expenditure on dogs, which grew by 35.2% between 2017 and 2022. As a result, the dog food segment's value increased by 16.7% between 2017 to 2022.
- The cat food segment is expected to experience the fastest CAGR of 5.5% during the forecast period in the country. This is due to the significant increase in the cat population, which grew by 43.7% between 2017 and 2022. This rise in the number of cats created a larger consumer base for cat food products. Cats are gaining popularity as pets due to their low maintenance requirements and cost-effectiveness compared to other pets.
- Other animals include birds, small mammals, and rodents. The adoption of other animals in Italy is on the rise, fueled by a growing interest in these non-traditional pets. As a result, the pet food market for other animals was valued at USD 1.16 billion in 2022.

- The pet food market in the country is expected to be driven by the growing consumer interest in pet adoption and the increasing expenditures on pets, coupled with the growing awareness of pet nutrition and diet.

Italy Pet Food Market Trends

Increasing demand for companionship and rising disposable income in the country led to an increase in the cat population

- Italy has been witnessing an increase in the cat population over the last few years since 2017, and there was a higher growth during the pandemic. The growth in Italy during the study period was mainly due to the decline in the human birth rate and an aging population, with childless and senior couples adopting more pets, including cats, as companions. The cat population in the country witnessed an increase of 8% between 2019 and 2020 because people adopted more pets, including cats, as they were confined to their homes, and human interactions were minimal due to the pandemic forcing lockdowns in the country. The effect of the pandemic on the cat food market is anticipated to be witnessed during the forecast period, as the average lifespan of cats is more than 20 years.

- Another factor increasing the adoption of pets, including cats, in the country is the rise in the disposable income of the Italian population. For instance, the average disposable income in Italy is expected to grow from USD 1,276 billion in 2020 to USD 1,574 billion in 2025, which is anticipated to help in the growth of the cat population during the period.

- A higher share of households have a dog rather than a cat because pet parents feel they are more secure at home alone with a dog, and they provide an active lifestyle, which is expected to lead to higher adoption of dogs than cats. For instance, in 2019, the share of households owing a dog accounted for 48.8% compared to cats accounting for 29.6%. However, the rising demand for cats during the pandemic is expected to help in the growth of the cat population in the future.

- Factors such as increasing demand for companionship and rising disposable income are anticipated to help increase the adoption rate of cats in the country during the forecast period.

The increasing trend of pet humanization and greater demand for premium products resulted in a rise in expenditure

- Italy is one of the major countries in terms of the overall pet population in the European Union. There is an increasing trend in the overall pet food expenditure in the country, which increased by 16.6% between 2019 and 2022. This increasing trend is mainly due to the rising number of pets in the country, which grew from 31.8 million in 2019 to 37.7 million in 2022. The trend of humanizing pets resulted in a greater demand for premium products like natural pet food and grain-free pet food.

- The expenditure on pet dogs and cats increased by about 22.5%, and the expenditure on other pet animals increased by about 8.9% between 2019 and 2022. Pet owners in Italy are increasingly focused on pet humanization, and higher-income pet owners are driving sales growth due to the use of natural ingredients and product premiumization on pet food. For instance, the retail sales value of premium pet food brands such as "Royal Canin" rose from USD 103.4 million in 2016 to USD 128.7 million in 2022, registering a CAGR of 3.7%, reflecting the escalating demand for premium pet products.

- As of 2022, around 97.8% of pet food sales occurred through offline retail stores such as supermarkets, specialty stores, and convenience stores, while 2.2% of sales took place through e-commerce. Supermarkets and specialty stores are the major distribution channels in the country. Supermarkets are preferred by price-sensitive customers due to the availability of discounts,

while specialty stores cater to consumers seeking a diverse range of premium and high-quality pet food products.

- The growing awareness of the benefits of high-quality pet food and the increasing premiumization of pet food are projected to continue driving pet expenditure in the country.

Italy Pet Food Industry Overview

The Italy Pet Food Market is fragmented, with the top five companies occupying 27.49%. The major players in this market are Affinity Petcare SA, Colgate-Palmolive Company (Hill's Pet Nutrition Inc.), Mars Incorporated, Nestle (Purina) and Vaflo Praha, s.r.o. (sorted alphabetically).

Additional Benefits:

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

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