

South America Pet Treats - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2017 - 2029

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Report description:

The South America Pet Treats Market size is estimated at USD 1.89 billion in 2024, and is expected to reach USD 3.69 billion by 2029, growing at a CAGR of 14.32% during the forecast period (2024-2029).

Rising cat population in the region due to their lower maintenance needs is propelling the pet treats market in South America

- Pet treats are commonly used to reward pets for their good behavior, provide mental stimulation, aid in training, promote dental health, and strengthen the bond between pets and their owners. As a result, pet treats accounted for 13.6% of the South American pet food market in 2022.
- Dogs are major consumers of pet treats, as they amounted to a market value of USD 1.04 billion in 2022 because dogs have a strong sense of smell and taste, making treats an enjoyable addition to their diets. Dogs have an instinct to chew; thus, treats may help satisfy this urge while promoting dental health. As a result, dental and crunchy treats dominate the dog treats segment, holding market shares of 26.8% and 23.9%, respectively, in 2022. The market value of the dog treats segment expanded by 79.1% between 2017 and 2021, primarily driven by a 12.6% increase in the pet dog population in the same years.
- Among animal types, the cat segment is projected to be the fastest-growing segment in South America, with a CAGR of 16.3% during the forecast period. This growth is primarily driven by the increasing cat population, which grew by 18.7% from 2017 to 2022, and the growing popularity of cats as pets due to their low maintenance and cost-effectiveness.
- In South America, the population of other animals, such as birds, small mammals, and rodents, surpasses the population of dogs and cats. As a result, the pet treats market for these other animals reached a valuation of USD 284.1 million in 2022. This is due to their lower maintenance needs and other animals being adopted at a higher rate, thus driving the growth of the market.
- The growing population of pets in the region is expected to drive the pet treats market during the forecast period.

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Growing demand for grain-free, organic, and single meat source treats driving the South American market

- South America is one of the largest pet treat markets in the world due to its higher pet population. The pet treats market accounted for 13.7% of the South American pet food market in 2022, which increased by 61.7% between 2017 and 2021. The increase in the market was associated with the rise in the usage of pet treats during the COVID-19 pandemic, as pet parents needed to engage their pets while staying at home. For instance, in 2020, the market value increased by 30% compared to 2019.
- Among pet treats, dental treats and crunchy treats occupied higher shares of 24.1% and 23.8%, respectively, of the South American pet treats market in 2022. As dental treats are regularly used for pets' dental health, they occupy a higher share in the region. However, freeze-dried and jerky treats are expected to grow faster, with a CAGR of 15.5% during the forecast period, as they are made with limited ingredients and have higher demand in premium markets in the region.
- In South America, Brazil was the largest country with respect to the pet treats market because of its higher pet population and the higher pet humanization among pet parents. However, Argentina is the fastest-growing country in the region because of the growing usage of pet food products and already established companies expanding their product portfolios. For instance, Molino Chacabuco announced the expansion of its brand, Raza, adding snacks and treats to its portfolio.
- Therefore, the increase in the usage of pet treats with rising pet humanization is expected to drive the pet treats market in South America at a CAGR of 13.9% during the forecast period.

South America Pet Treats Market Trends

Brazil accounts for the largest cat population in the region with the advantages of adaptability to smaller living spaces and lower maintenance

- The pet cat population in South America has been steadily increasing, which increased by 13.3% between 2019 and 2022. This upward trend may be attributed to the higher adoption rates of cats as companions during the extended periods of home confinement brought on by the pandemic. Among the countries in the region, Brazil holds the largest cat population, accounting for about 55.5% of the total cat population as of 2022. In South America, cats made up 19.3% of the overall pet population in 2022. This relatively lower proportion of cats may be attributed to cultural perceptions that dogs are considered more practical and valued pets. As a result, the number of cats represents only 50.0% of the total dog population in the region.
- However, the adaptability of cats to smaller living spaces, without feeling confined, coupled with their lower maintenance costs compared to dogs, has contributed to an increasing preference for cat ownership. This trend has led to a significant rise in the cat pet population across the region. In Brazil, as of 2020, about 14.3 million households owned cats as pets. Similarly, in Argentina, the rate of cat ownership is even higher, with 31.4% of households, which is 4.6 million households holding cats as pets.
- An important emerging trend in the region is the establishment of cat cafes. As of 2021, around 20 cat cafes were found in Brazil, providing customers with a unique opportunity to enjoy a drink while interacting with cats in a comfortable setting. This growing trend of cat cafes, coupled with the cat's ability to adopt smaller living spaces, has the potential to enhance the adoption of cats as popular pets in the region.

Increasing focus on pet humanization, product premiumization, and growing disposable income among pet owners are driving pet expenditure in the region

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- Pet expenditure in South America has shown consistent growth, with an increase of about 18.1% between 2019 and 2022. This upward trend may be attributed to the rising number of pet owners across the region. In Brazil, the number of households owning a pet registered a CAGR of 1.3%, while in Argentina, it witnessed a CAGR of 1.4% between 2016 and 2020.
- Pet owners in the region are increasingly focused on pet humanization, with higher-income individuals driving sales growth by opting for products made with natural ingredients and driving pet product premiumization. For instance, the retail sales value of pet treats in Brazil witnessed a significant rise from USD 79.8 million in 2016 to USD 136.8 million in 2020, with a CAGR of 14.4%. This surge in demand reflects the growing preference for premium pet products. During the period from 2017 to 2022, the number of pet owners spending on pet treats annually increased by about 41.9% for cats, 18.2% for dogs, and 6.7% for other pets. Among the South American countries, Brazil stood out with the highest pet treat expenditure per animal, reaching USD 75.0, followed closely by Argentina at USD 57.4 in 2022. This higher pet expenditure in Brazil is largely due to the country's increased pet product premiumization.
- Among distribution channels, offline retail channels such as pet shops, vet clinics, and supermarkets are preferred distribution channels for purchasing pet food products in the region. However, during the pandemic, the adoption of online channels increased for pet treats in the region. The higher consumption of premium pet treats and growing pet humanization are the factors anticipated to drive pet expenditure in the region during the forecast period.

South America Pet Treats Industry Overview

The South America Pet Treats Market is fragmented, with the top five companies occupying 37.63%. The major players in this market are Colgate-Palmolive Company (Hill's Pet Nutrition Inc.), Empresas Carozzi SA, Mars Incorporated, Nestle (Purina) and Premierpet (sorted alphabetically).

Additional Benefits:

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

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