## USPDULTRY <br> U.S. POULTRY \& EGG ASSOCIATION

NORTH AMERICAN RENDERERS ASSOCIATION

## The Pet food Market in LA

Miguel Angel Lopez

## Agenda

Global Market Figures \& Trends

LA quick Snapshots

Major trends in the 4 largest LA markets

More findings \& Conclusions

## Global Market Figures \& Trends

## Global Market Figures

| 2021 |  | Población (millones) Population (millions) |  |  | Consumo de alimento balanceado en volumen (millones de toneladas) Pet food intake (million tons) |  |  | Wallor total [miles de millones de dilurest Tomivalue [billans of doüres |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| No. | Pais / Country | Perros <br> Dogs | Gatos Cats | Total | Perros <br> Dogs | Gatos Cots | Consumo Total |  |
| 1 | EUA / USA | 84.9 | 94.2 | 179.1 | 6.1 | 4.7 | 10.8 | 36.3 |
| 2 | Ching / Chine | 34.5 | 62.2 | 96.7 | 1.4 | 1.9 | 3.3 | 8.5 |
| 3 | Brasil / Brazil | 55.1 | 24.7 | 79.8 | 2.3 | 0.6 | 2.9 | 5.1 |
| 4 | RIISIET: | 16.2 | 26.3 | 42.5 | 1.2 | 0.5 | 1.7 | 3.1 |
| 5 | México / Mexico | 18.5 | 8.7 | 27.2 | 1.1 | 0.3 | 1.5 | 4.1 |
| 7 | Frantia / Frunte | 8.2 | 12.6 | 20.8 | 0.5 | 0.6 | 1.1 | 4.3 |
| 6 | Alemania / Germany | 7.6 | 12.8 | 20.3 | 0.5 | 0.6 | 1.1 | 4.2 |
| 8 | Reino Unido / United kingdom | 9.4 | 9.0 | 18.3 | 0.6 | 0.4 | 1.0 | 4.4 |
| 9 | Japón / Jopan | 10.7 | 9.7 | 20.3 | 0.7 | 0.3 | 1.0 | 4.1 |
| 10 | Filipinas / Philippines | 13.0 | 8.6 | 21.6 | 0.7 | 0.2 | 0.9 | 1.6 |

## Global Market Figures

CONSUMO GLOBAL DE ALIMENTOS PARA MASCOTAS POR PRINCIPALES PAÍSES CONSUMIDORES, 2021 (VOLUMEN)
PET FOOD: MAIN CONSUMER COUNTRIES, 2021 (VOLUME)

© EUA/USA $37 \%$

- China/China 11\%
- Brasil/Brozil $\quad 10 \%$
© Rusia/Russia 6\%
- México/Mexico $5 \%$
© Francia/France 4\%
(5) Alemania/Germony 4\%
(5) Reino Unido/UK 4\%
- Japón/Jopon 3\%
© Filipinas / Philippines 3\%
(6) Losdemás/Others 13\%


## Trend: High inflation rates

Inflation Rate World, 2020-2023
Inflation, \%


[^0]
## Trend: Health \& nutrition trends

Top 10 Claims in Pet Care 2020/2022
\% of products with claims available online


## Trend: Top 10 reasons for pets owners purchasing through channel world, 2023

## ONLINE

Ease and avallability of delivery, 27\%
Best Price,37\%

Free Shipping , 33\%

Ability to order at time from anywhere, 30\%

Variety of brands, 27\%
Variety of brands, 27\%
Ease and avallability of delivery, 27\%

## IN-STORE

See or try before buying, 44\%

Immediate purchase,37\%

Convenient location / Access, 30\%

To avoid paying for shipping,28\%

Ease of return, 25\%

## Trend: Top 10 reasons for pets owners purchasing through channel world, 2023

## ONLINE

Inmediate purchase,22\%

Access via different devices , 19\%

Not available at store,18\%

Brands not in the local market, $23 \%$

Product Info, comparison, reviews, 21\%

## IN-STORE

Stores are more trustworthy, 24\%

No delivery related hassles, 23\%

In-store consultations, 19\%

To see new products, 18\%

Loyalty rewards, 17\%

## LA quick Snapshots



| $2021$ | Población personas (millones) Humon population (millions) | Perros (millones) Dog population (millions) | Gatos (millones) Cot population (milions) | Población de perros y gatos (millones) Cot and dog population (millions) | Consumo promedio por mascota (gr./dia) Average consumption per pet (gr./day) | Perros: volumen de mercado [miles toneladas) Dogs: market volume <br> (thousands of tons) | Gatos: volumen de mercado (miles toneladas) Cats: morket volume (thousonds of tons) | Volumen de mercado (miles toneladas) Morket volume (thousonds of tons) |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| Brasil / Brazil | 219.2 | 54.7 | 23.6 | 78.2 | 106.6 | 2,288.1 | 787.8 | 3,075.9 |
| México / Mexico | 128.5 | 18.5 | 8.7 | 27.2 | 119.8 | 1,120.5 | 344.7 | 1,465.2 |
| Argentina | 45.6 | 9.9 | 3.9 | 13.8 | 135.5 | 561.0 | 128.0 | 688.9 |
| Colombia | 50.9 | 4.6 | 1.3 | 5.9 | 137.7 | 262.6 | 38.8 | 301.4 |
| Chile | 18.8 | 3.7 | 0.9 | 4.7 | 167.4 | 264.5 | 26.8 | 291.3 |
| Guatemala | 17.5 | 2.5 | 0.5 | 3.1 | 136.3 | 138.2 | 17.8 | 156.0 |
| Perú / Peru | 33.4 | 4.1 | 0.9 | 5.0 | 84.2 | 128.9 | 25.8 | 154.7 |
| Costa Rica | 5.1 | 2.3 | 0.5 | 2.8 | 138.6 | 124.7 | 17.2 | 141.9 |
| Uruguay | 3.5 | 1.8 | 0.7 | 2.5 | 143.0 | 107.9 | 24.8 | 132.6 |
| Panamá / Panama | 4.6 | 2.2 | 0.1 | 2.3 | 146.6 | 123.3 | 4.4 | 127.7 |
| Honduras | 9.8 | 1.3 | 0.3 | 1.6 | 125.3 | 67.3 | 9.1 | 76.4 |
| Bolivia | 11.8 | 2.1 | 0.4 | 2.5 | 81.7 | 63.8 | 11.5 | 75.3 |
| El Salvador / | 6.6 | 1.4 | 0.3 | 1.7 | 113.5 | 62.6 | 6.9 | 69.5 |
| Ecuador | 17.4 | 1.9 | 0.3 | 2.2 | 82.2 | 62.0 | 5.2 | 67.3 |
| Paraguay | 7.4 | 1.1 | 0.2 | 1.4 | 124.6 | 54.0 | 7.1 | 61.2 |
| Rep. Dominicana Dominican Rep. | 11.3 | 1.0 | 0.1 | 1.1 | 131.0 | 49.8 | 3.3 | 53.1 |
| Haití | 11.4 | 1.1 | 0.3 | 4 | 87.9 | 38.7 | 5.6 | 44.3 |
| Cuba | 11.9 | 2.0 | 0.7 | 2.7 | 32.0 | 28.7 | 3.5 | 32.2 |
| Venezuela | 33 | 3.1 | 0.6 | 3.7 | 16.9 | 22.3 | 1.1 | 23.4 |
| Total (suma) | 646.2 | 119.6 | 44.5 | 164.1 | 111.1 | 5,569.1 | 1,469.4 | 7,038.4 |

## Major trends in the 4 largest LA markets



## Brazil



## Brazil

| $2021$ | Población personas (millones) Human pepulation (mililens) | Perros [millones) Dog population (malions | Gatos (millones) Cot population [militans] | Poblacionde perros y gitos [milloniss) cot ond dog population (milimis) | Consume promedio por mastota (berodia) Alerage consumption par pet (gr./day) | Perros: volumen de mercado [miles teneladids] Dogss morket volume <br> (thousands of tens, | Gatos: volumen demerado (miles toneladas) Cots: morket volume theursends of tanss | Volumende mecado [milus toneladas) Morket volume Ithousgnds of [00ns] |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| Brasil / Brozil | 219.2 | 54.7 | 23.6 | 78.2 | 106.6 | 2,288.1 | 787.8 | 3,075,9 |
| Mexico/Mexico | 128.5 | 18.5 | 8.7 | 27.2 | 119.8 | 1,120.5 | 344.7 | 1,465.2 |
| Argentina | 45.6 | 9.9 | 3.9 | 13.8 | 135.5 | 561.0 | 128.0 | 688.9 |
| Colombia | 50.9 | 4.6 | 1.3 | 5.9 | 137.7 | 262.6 | 38.8 | 301.4 |

## Brazil

|  | 2021 | 2022 | Growth |
| :--- | :---: | :---: | :---: |
| Birds | 40.700 .000 | 41.300 .000 | $150 \%$ |
| Dogs | 65.500 .000 | 67.800 .000 | $3.50 \%$ |
| Cats | 31.600 .000 | 33.600 .000 | $6.00 \%$ |
| Ornamental fish | 21.300 .000 | 22.200 .000 | $4.00 \%$ |
| Others (Reptiles and <br> small mammals) | 2.600 .000 | 2.700 .000 | $3.80 \%$ |

## Brazil

Growth 2022/2023


## Brazil

## COMPARISON OF TAXES BETWEEN REGIONS



## Mexico



## Mexico

| $2021$ | Poblacion personas (milloness) Humben population (minilons) | Peros [frillones) Dog population (atilings) | Gat0s (millones) cot population [minilons] | Poblacionde perros y gitos [milloness) Cot ond dog population (maximits) | Consume promedio por mastota (birdis) Averoge consumption par pet (gr./doy) | Perros: volumen da marcado [milest teneladas) Dogss morket volume thhousconds of tows | Gatos: <br> volumen de merchdo (miles toneladas Cats: market wolume (thewsends of tonss | Volumen de mercado Imilks toneladas! Morket volume Thbulsonds of [ons] |
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## Mexico

- Super Markets
- Green Channel
- Pet Shops

■ Veterinarians

- Convenience stores
- Others



## Mexico



## Mexico

Humanization and pet's health and wellness pull new premium brand purchasers

Inflation promotes the growth of low-priced emerging brands

## Mexico

Cross channel switch (Traditional wholesale : Retail)

Increased number of products:
(2,736-2022- versus 1,609-2020-)

## Mexico



Source: Thriple tree

## Argentina



## Argentina

| 2021 | Población personas (millones) Human pepulation (mililens) | Perros [milloness) Dog population (milimins) | Gatios (millones) Cot population (nxilmas) | Poblacionde perros y gitos [milloness) Cot ond dog population (maximits) | Consumo promedio por mascota (ex.dia) Average consumption per pet (gr.doy) | Perros: volumen de mercado [miles toneladids] Dogs morket volume (thousands of tevis) | Gatos: wolumen de mercado (miles toneladas) Cats: market wolume (thowsends of tans | Volumende mecrado [milles toneladas\| Market volume ithousonds of (cons) |
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## Argentina

Total estimated volumen: 1, 100,000 MT (2023)

Around $85 \%$ of the volumen is local manufactured

Governmet set retention tax in export goods
86\% dog food
$14 \%$ cat food

High inflation rates

## Argentina

Bad weather in 2023 (dry): soybean and grains

During Covid pandemia pet ownership increased in a 200\% value

Owners concerned in health \& wellness of their companion animals

Sustaintability awarness and demand

## Colombia

## Colombia

| $2021$ | Población <br> personas <br> (millones) <br> Human pepulation [milicais] | Perros \|milliones| Dog population (milliths) | Gatos (millones) Cot population (minilons) | Poblaciofnde perros y gatos [milloness Cot ond dog population (mililinss) | Consumo promedio por mascota <br> (berdia) <br> Averuge <br> consumption <br> petredt <br> (gr./doy) | Perros: volumen de marcado [miles teneladias) Dugs: morket volume (thousands of towis) | Gatos: wolumen demercado (miles toneladas) Cats: market wolume (thewrends of fons | Volumende mecado Imilhs Wheladdss\| Morket volume Thbuysnds oflonis) |
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Source: Amexfal

## Colombia

Increase in number of pets: 0.9\% (2022-2023)
Dogs 2.4\%
Cats -3.5\%


## Colombia

## Price increase of $17 \%$ (2022-2023)

Economy and value products account for $75 \%$ of total volumen

New super premium brands are growing steadily

## More facts

## Cat ownership



## More facts

## New categories



## More facts

New categories


1

## More facts

## Interest in new processing methods



## More facts

## Interest in new options in wet pet food



## More facts

Customized diets and delivering methods


## More facts

## Interest in new processing methods

## More facts

## Humanized flavors (aromas)



## More facts

## Innovative proposals



## Future

## Premium

## Economy


?


## Thank you

## www.mlopez.mx




[^0]:    Source: Euromonitor Passport, Economies and Consumers

