



NORTH AMERICAN RENDERERS ASSOCIATION



The Pet food Market in LA

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Agenda

Global Market Figures & Trends

LA quick Snapshots

Major trends in the 4 largest LA markets

More findings & Conclusions

Global Market Figures & Trends

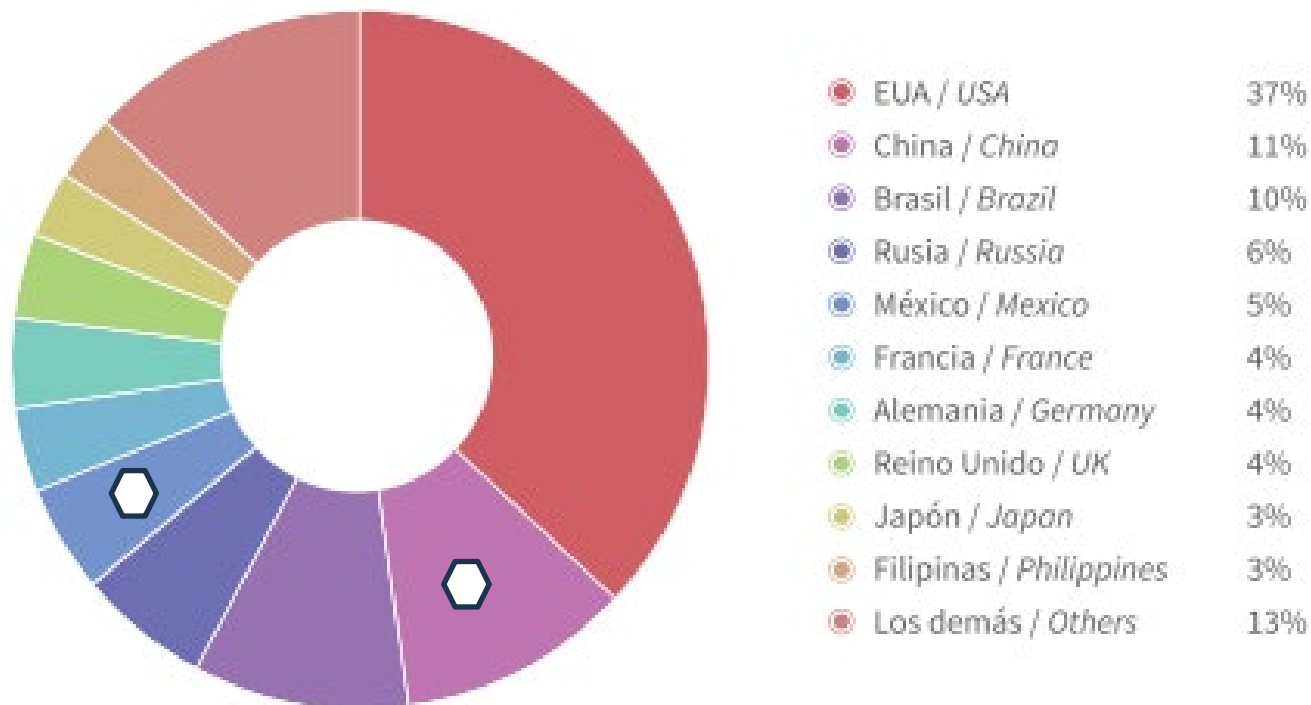


Global Market Figures

2021		Población (millones) <i>Population (millions)</i>			Consumo de alimento balanceado en volumen (millones de toneladas) <i>Pet food intake (million tons)</i>			Valor total (miles de millones de dólares) <i>Total value (billions of dollars)</i>
No.	País / Country	Perros <i>Dogs</i>	Gatos <i>Cats</i>	Total	Perros <i>Dogs</i>	Gatos <i>Cats</i>	Consumo Total	
1	EUA / USA	84.9	94.2	179.1	6.1	4.7	10.8	36.3
2	China / China	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	Rusia / Russia	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	Francia / France	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 / Japan	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

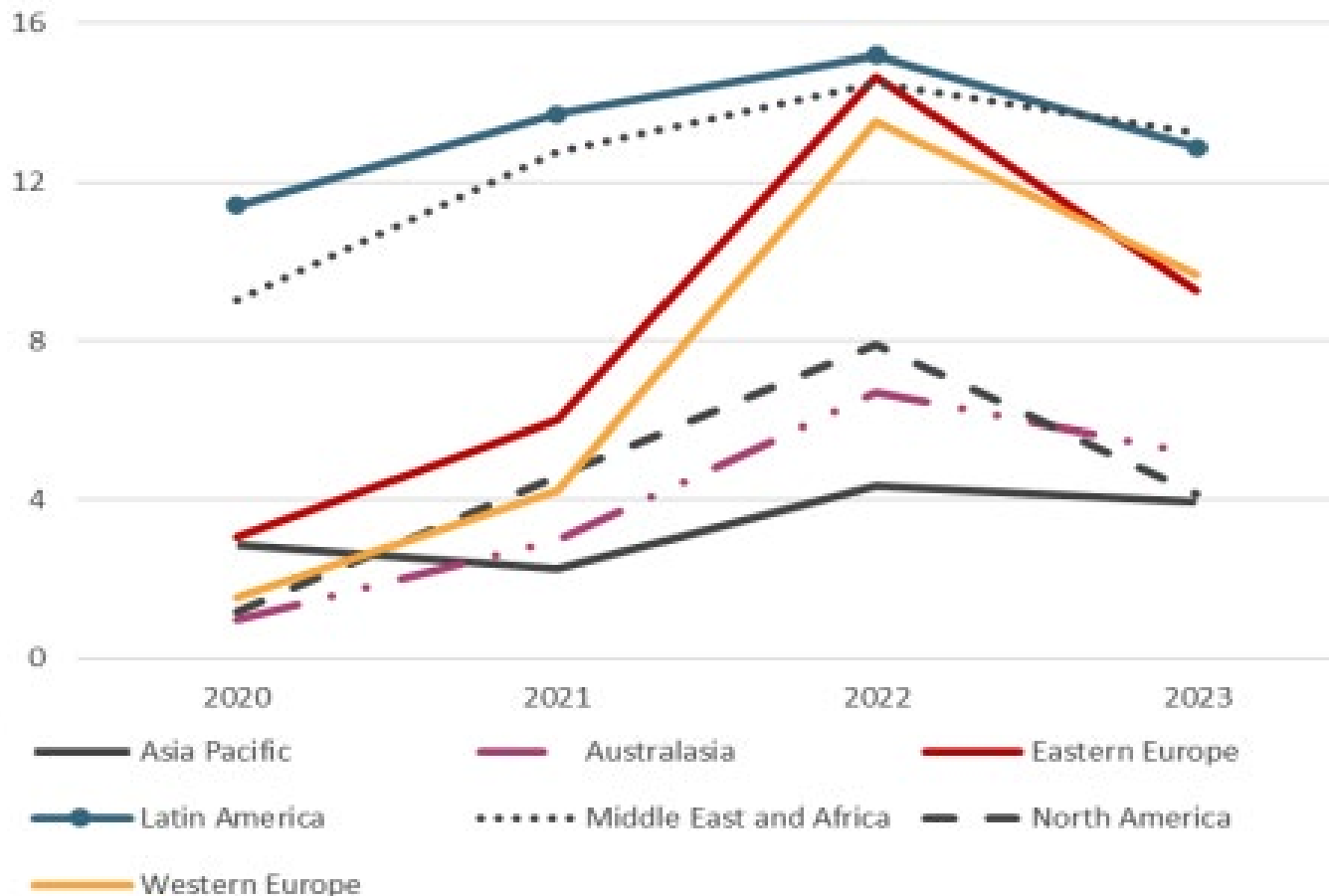
CONSUMO GLOBAL DE ALIMENTOS PARA MASCOTAS POR PRINCIPALES PAÍSES CONSUMIDORES, 2021 (VOLUMEN)
PET FOOD: MAIN CONSUMER COUNTRIES, 2021 (VOLUME)



Trend: High inflation rates

Inflation Rate World, 2020-2023

Inflation, %

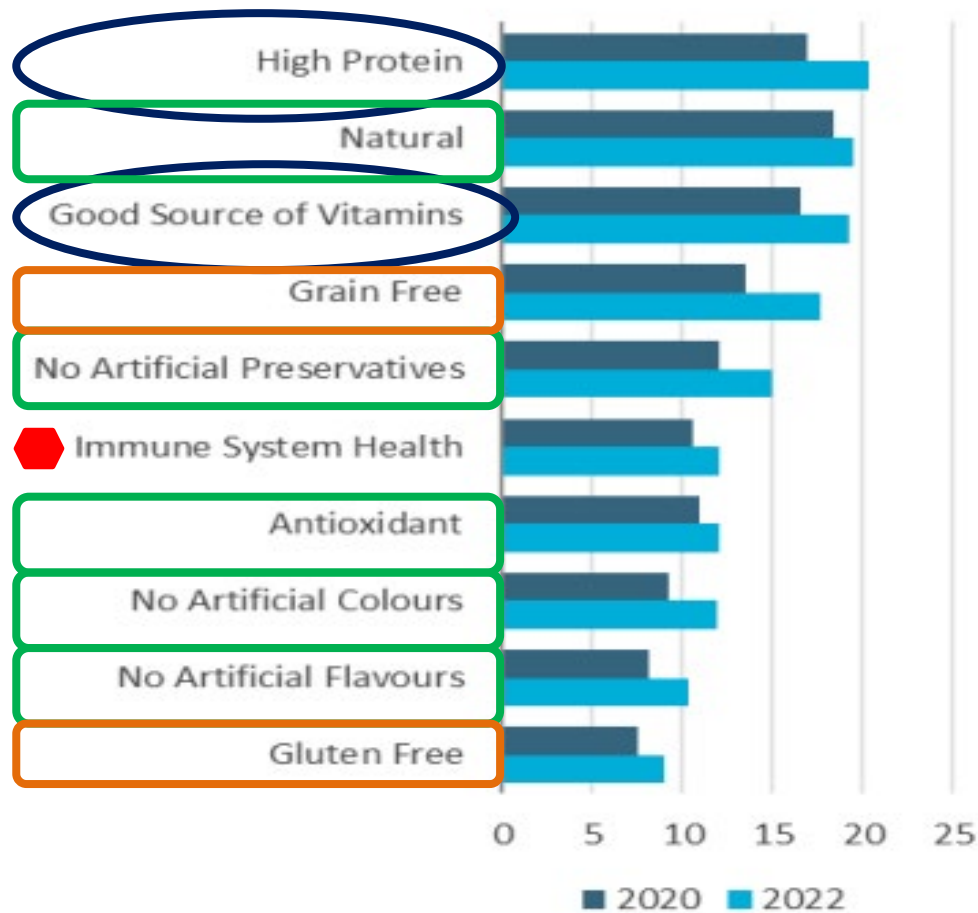


Source: Euromonitor Passport, Economies and Consumers

Trend: Health & nutrition trends

Top 10 Claims in Pet Care 2020/2022

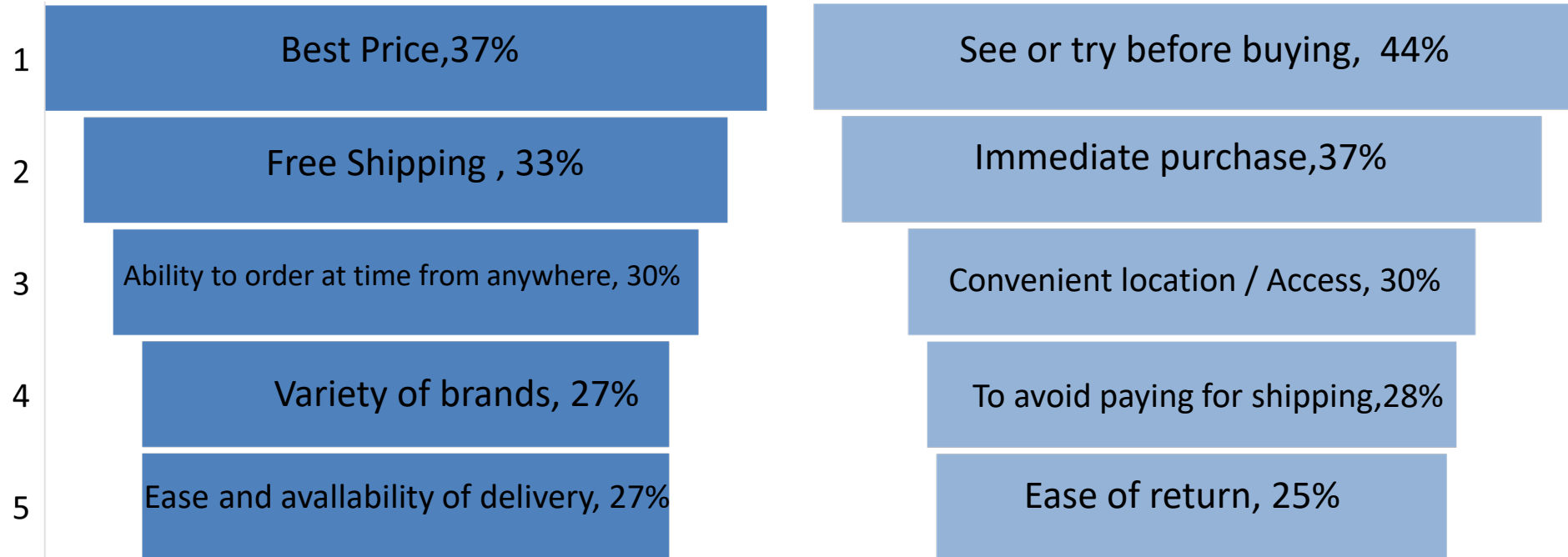
% of products with claims available online



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

ONLINE

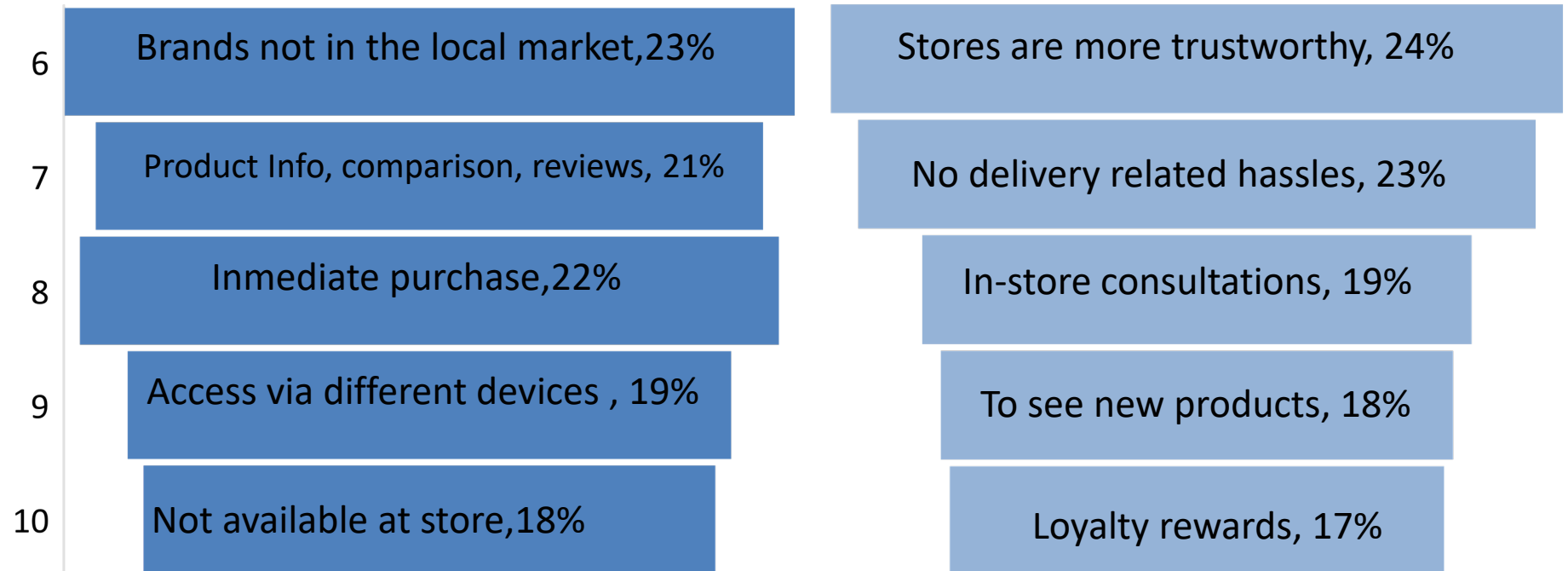
IN-STORE



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

ONLINE

IN-STORE



LA quick Snapshots



2021	Población personas (millones) <i>Human population (millions)</i>	Perros (millones) <i>Dog population (millions)</i>	Gatos (millones) <i>Cat population (millions)</i>	Población de perros y gatos (millones) <i>Cat and dog population (millions)</i>	Consumo promedio por mascota (gr./día) <i>Average consumption per pet (gr./day)</i>	Perros: volumen de mercado (miles toneladas) <i>Dogs: market volume (thousands of tons)</i>	Gatos: volumen de mercado (miles toneladas) <i>Cats: market volume (thousands of tons)</i>	Volumen de mercado (miles toneladas) <i>Market volume (thousands of tons)</i>
Brasil / <i>Brazil</i>	219.2	54.7	23.6	78.2	106.6	2,288.1	787.8	3,075.9
México / <i>Mexico</i>	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 / <i>Peru</i>	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 / <i>Panama</i>	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 <i>Dominican Rep.</i>	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

Source: Amexfal

Major trends in the 4 largest LA markets



Brazil



Brazil

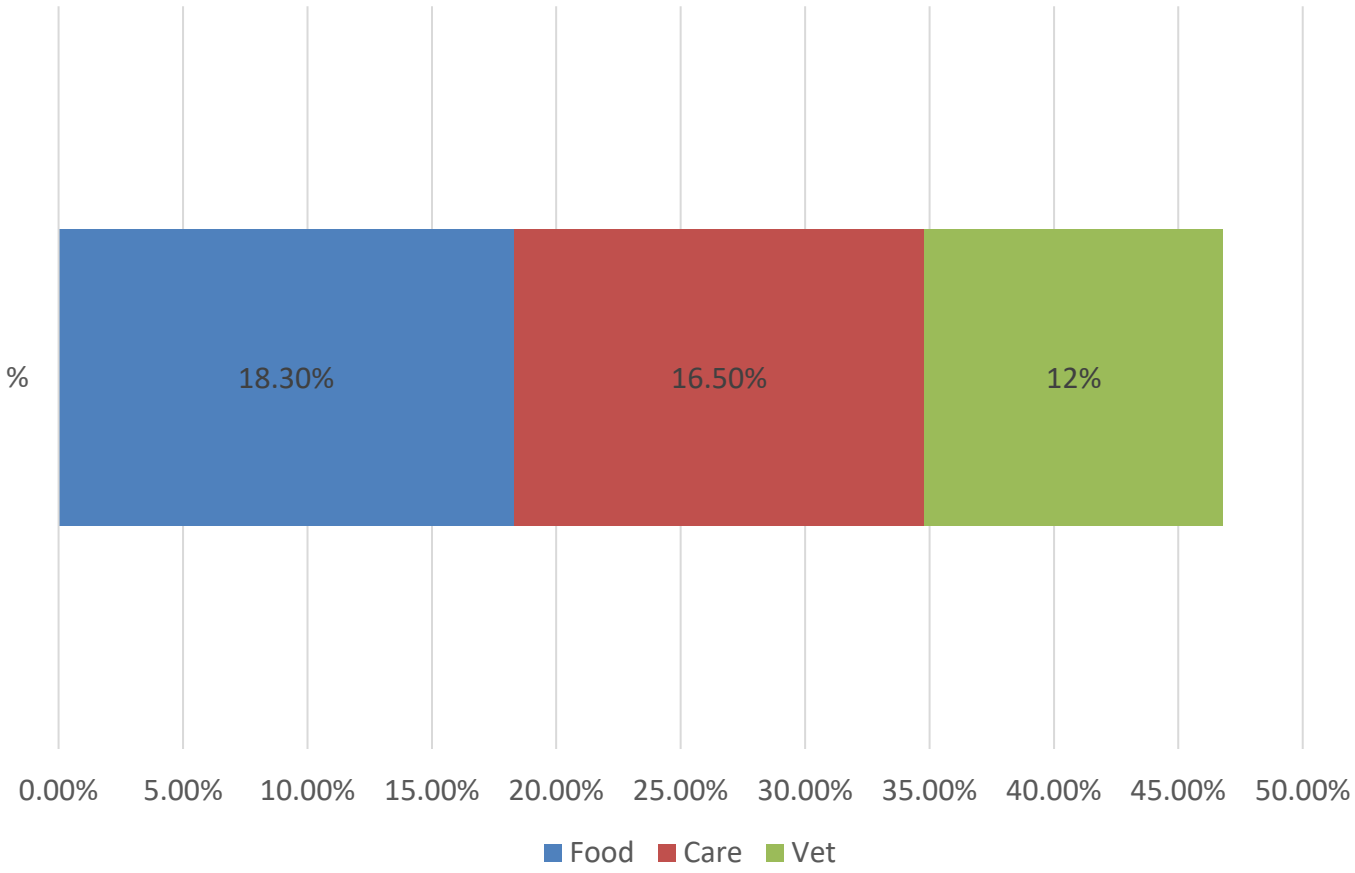
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Brazil

	2021	2022	Growth
Birds	40.700.000	41.300.000	1.50%
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 small mammals)	2.600.000	2.700.000	3.80%

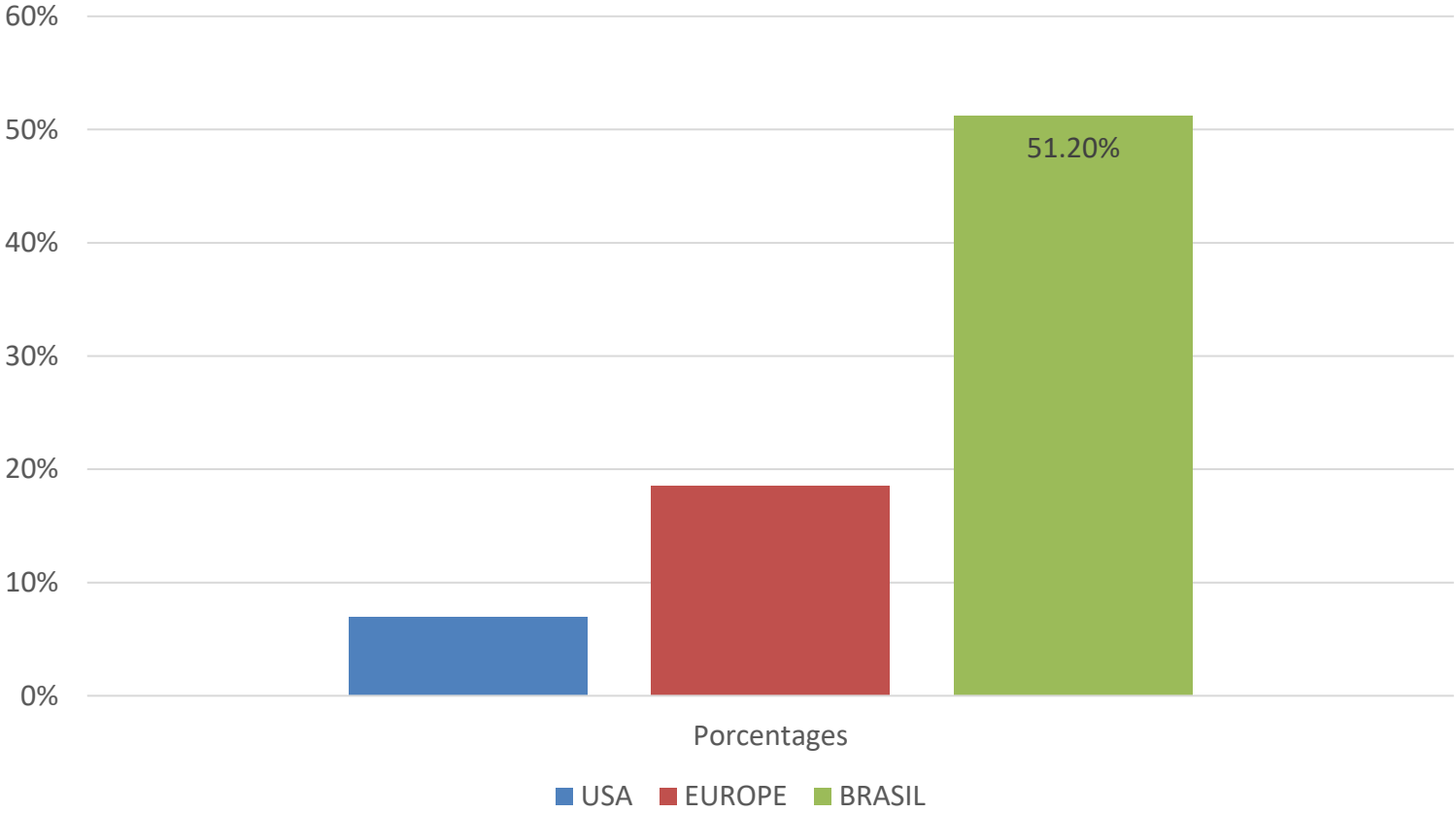
Brazil

Growth 2022/2023



Brazil

COMPARISON OF TAXES BETWEEN REGIONS



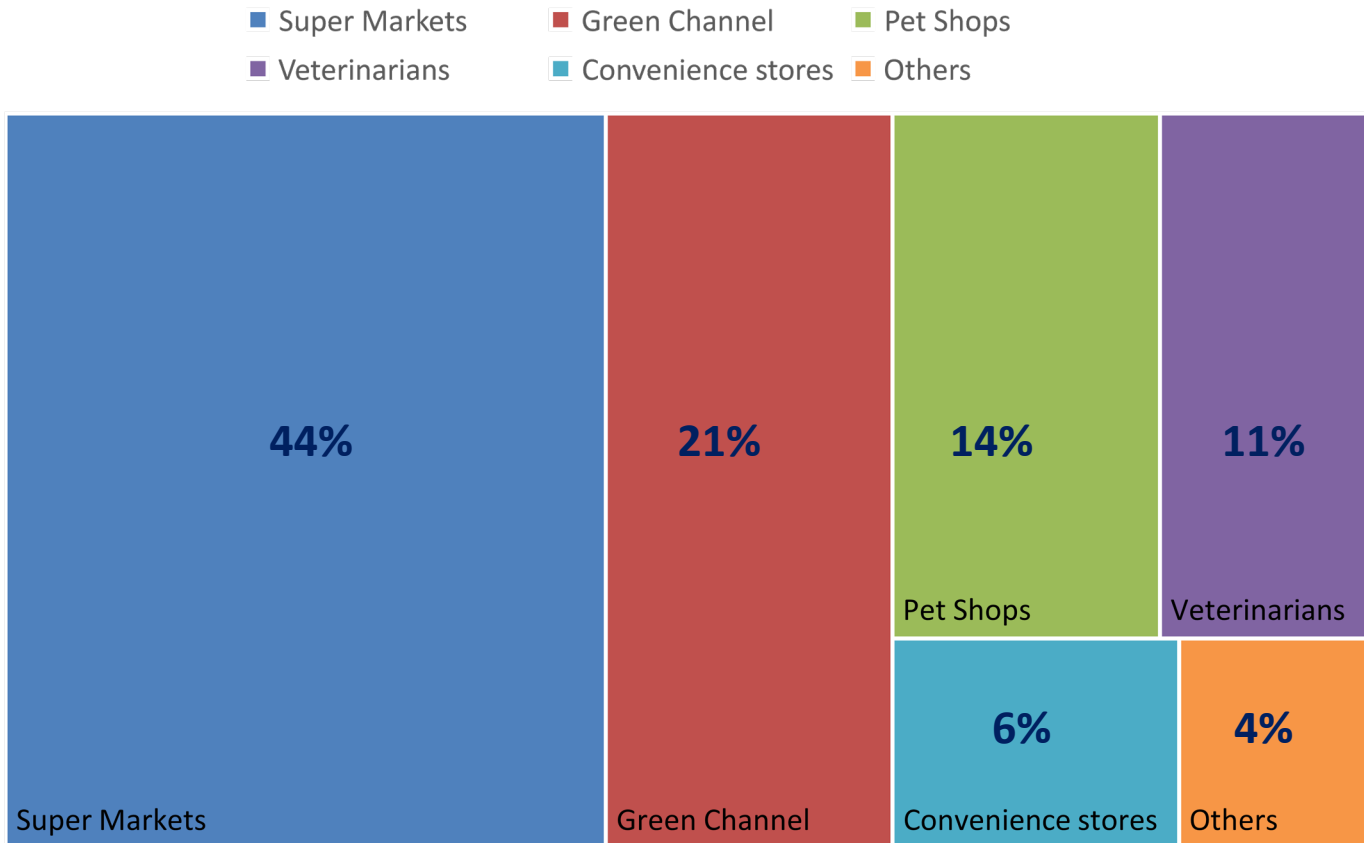
Mexico



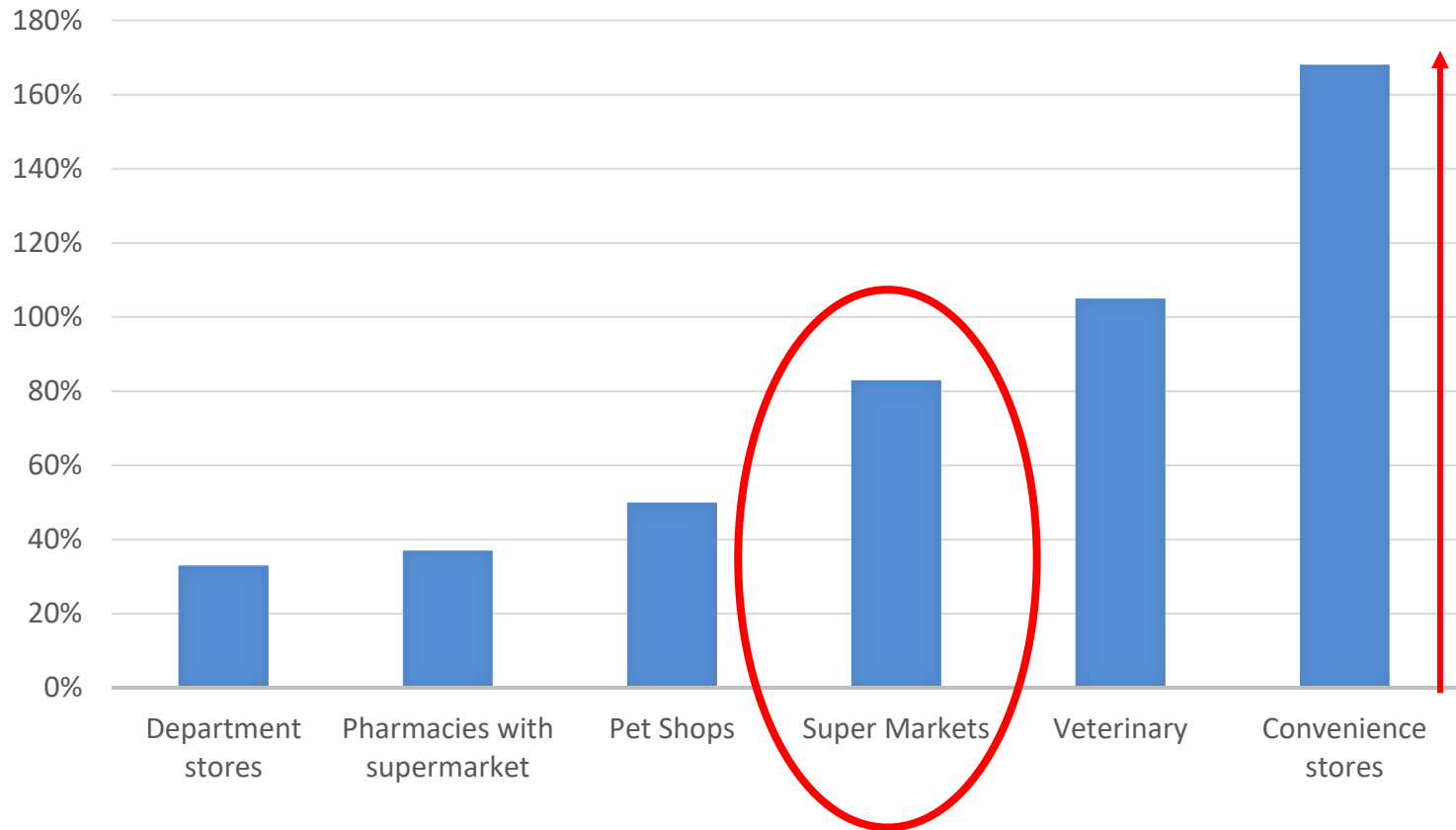
Mexico

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Mexico



Mexico



Mexico

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



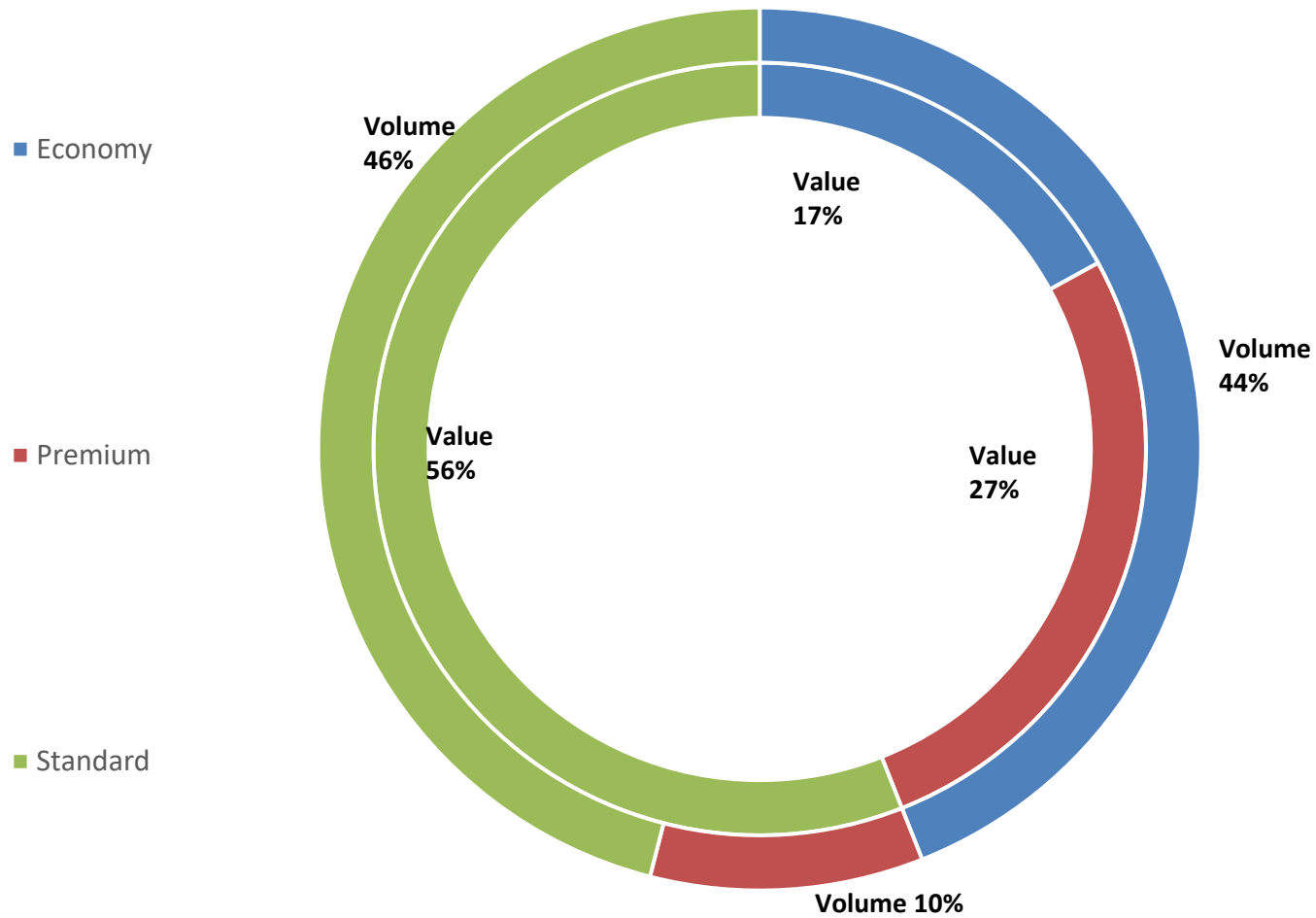
Inflation promotes the growth of low-priced emerging brands

Mexico

Cross channel switch (Traditional wholesale :
Retail)

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

Mexico



Source: Triple tree

Argentina



Argentina

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Argentina

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

Around 85% of the volumen is local manufactured

Government 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 pandemic pet ownership increased in a 200% value

Owners concerned in health & wellness of their companion animals

Sustainability awareness and demand

Colombia



Colombia

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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



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

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