

A large, white, abstract shape on the left side of the slide, resembling a stylized 'R' or a speech bubble, set against a blue-to-purple gradient background.

Petcare E-commerce Growth

11.03.25

BEATRICE MONZA

WE ARE RETEX

The MarTech company that promotes and accelerates connections between **brands** and **stakeholders**, guiding companies in the transition towards a **new meaning of Retail**.

We achieve this through a design approach that blends innovation, technology, data, and creativity.

Key data

2100*

Talents across the world

€ 300M+*

Estimated group revenue in 2025

6 countries

Italy, Spain, Portugal, Serbia, China, Mexico

32

Nationalities in our team

SOCIETÀ
BENEFIT
& UNGC
MEMBERS

ISO27001
CERTIFIED
We guarantee the highest level of security for our customers



atoms

CONNEXIA

GOSMAG

KONVERGENCE

RETEX 中国

tier1

witailer

A single partner, infinite possibilities to connect with your customers

TECH

- RETAIL TECHNOLOGY
- IN-STORE INNOVATION
- OMINCHANNEL INTEGRATION
- BUSINESS PERFORMANCE

DIGITAL & BUSINESS PERFORMANCE

- BUSINESS INNOVATION ADVISORY
- DIGITAL COMMERCE
- UX/UI DESIGN
- MARKETPLACE STRATEGY & ANALYTICS

MARKETING & COMMUNICATION

- BRAND & MARKETING STRATEGY
- CREATIVITY AND CONTENT
- MEDIA & INFLUENCER MANAGEMENT
- ADTECH

ESG ADVISORY

- GOVERNANCE & STRATEGY
- SUSTAINABILITY TRAINING
- SUSTAINABILITY REPORTING
- CERTIFICATIONS & RATINGS

OPERATIONS

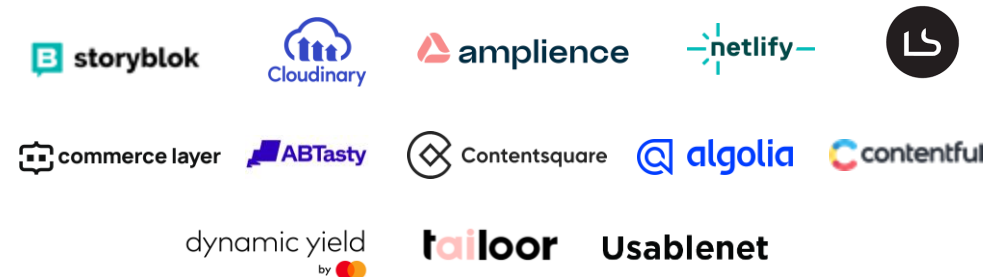
- TECHNICAL SUPPORT
- SYSTEM INTEGRATION
- SERVICE DESK
- SOFTWARE MAINTENANCE

Our partners

RETAIL & OPERATIONS



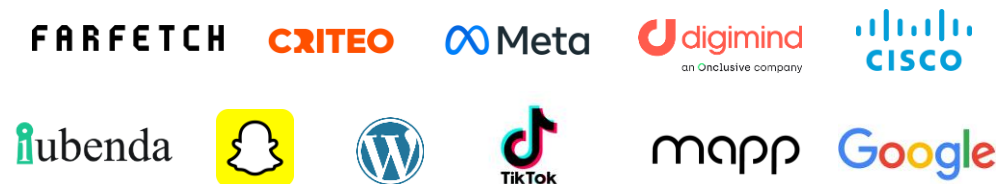
CONTENT & DATA



BUSINESS



COMMUNICATION & MEDIA



They trust us

FASHION & LUXURY

Bata

BALLY

OVS

VERSACE

AW
LAB

TOD'S

PRADA

VALENTINO

BVLGARI

PINKO

yamamay

ARMANI

KERING

ELISABETTA FRANCHI

MONCLER

CONSUMER RETAIL & FOOD SERVICE

ARCAPLANET

ACTION

unes

PER
La grande

MERCATO

Supermercati

coop
Alimento 3.0

CRAI
Xibba

BURGER
KING

Poli

Carrefour

BASKO

GRUPPO
UNA

BW
Best Western

illy

Temakinho

EATALY
ITALY

OBICÀ

STARBUCKS

doreca

DIRECT TO CONSUMER

GNV

chicco

Barilla

PERFETTI
van Melle

DeLonghi

LAVAZZA

buddy
bank

AstraZeneca

ENGIE

ticketmaster

CONAI
CONFESSIONI ITALIANE NELLE PASTICCERIE

YAMAHA

amazon music

ROVAGNATI
IL BISCOTTO ITALIANO

biorepack

shopify

europ
assistance

crocierissime

Pet Economy in Europe

A 53bn € market

In 2022 **half of the european households own a pet.**



29.2 ANNUAL SALES OF PET FOOD PRODUCTS (€bn)

9.9 ANNUAL VOLUME OF PET FOOD PRODUCTS (Millions Tonnes)

2% ANNUAL GROWTH IN VOLUME (Max)

9% ANNUAL GROWTH OF INDUSTRY

24.6 RELATED SERVICES AND PRODUCTS (Accessories and Services) €bn

9% GROWTH IN SERVICES AND PRODUCTS

European Overview 2022



TOTAL POPULATION EXCLUDING AQUARIA: 329M

TOP PETS IN EUROPE



CATS
129m



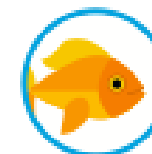
DOGS
106m



ORNAMENTAL BIRDS
52m



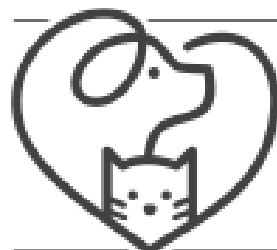
SMALL MAMMALS
30m



AQUARIA
23m



TERRARIA
12m



166m

households in Europe have a pet

50%

of households own a pet

25%

of households own at least one dog

27%

of households own at least one cat

Pet Care E-commerce in Europe

14,1bn \$ Revenue for Pet Supplies e-commerce in 2023

E-commerce share keeps growing among the pet care distribution channels.

In the **UK**, Western Europe's biggest pet care market, **e-commerce accounts for a 35% sales share.**

Pet shops and superstores still lead regionally, increasingly pursuing an omnichannel approach, but also expanding their physical footprint.

eCommerce Revenue Development in Europe, in Billion US\$		
149	143	141
Bags & Accessories 18%	Electrical Appliances 32%	Other 33%
Footwear 23%	Consumer Electronics 68%	Toys 10%
Apparel 59%		Pet Supplies 10%
		Sports Equipment 17%
		Media 31%
Fashion	Electronics	Hobby & Leisure

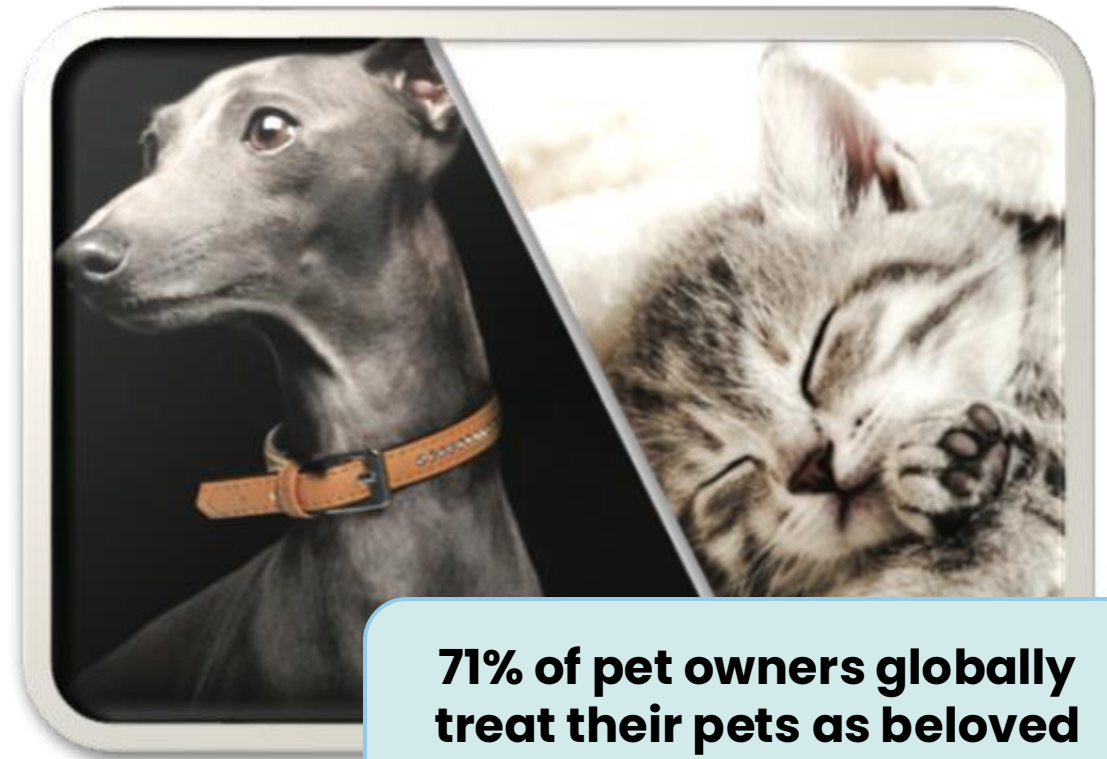
Source: ECDB eCommerce in Europe 2024

From Pet owners to Pet parents

Increasingly treating pets as family members

Humanization of Pets is leading to a rise in demand for premium products and advanced services focused on the **emotional and physical well-being of pets**, including specialized foods and eco-friendly products.

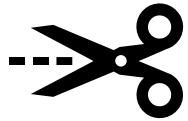
The **Pet Technology** sector is rapidly expanding too, focusing on products – smart collars, automatic feeders, etc. – and digital solutions – teleconsultation, health insurance – for pet well-being.



71% of pet owners globally treat their pets as beloved members of the family

Three Consumer Trends in Pet Care

In 2024, according to Euromonitor International



Value Hackers:

Pet owners who seek the best deals

In response to high inflation and escalating costs, consumers are resorting to **cost-cutting behaviours**:

- Planning to visit discounters more frequently
- Buying more private label products
- Utilise rewards points for payment



Delightful Distractions:

Joy from our furry friends

Consumers feel the urge to escape the burdens of their everyday routines and problems by **cuddling their pets** with:

- Human-grade products (treats, mixers, specialty foods)
- Pet services (spas, salons, health and wellness centres, swimming pools and studios)



Wellness Pragmatists:

Demand for functional food expands beyond humans to pets

Consumers are seeking healthy foods and solutions, aiming to **keep their pets fit and healthy** through:

- Pet food supplements
- Preventive health solutions (health wearables)

Petcare E-commerce Growth: Optimizing Assortment & Audience Segmentation

Stable growth in Petcare searches on Amazon

EU4 Markets show consistent demand, with Italy leading the trend

Prodotti per animali domestici



Ricerche

113.5Mln

↑ 7% YoY



Productos para mascotas



Ricerche

90.6Mln

0% YoY



Animalerie



Ricerche

129.3Mln

↑ 2.3% YoY



Haustier



Ricerche

262.9Mln

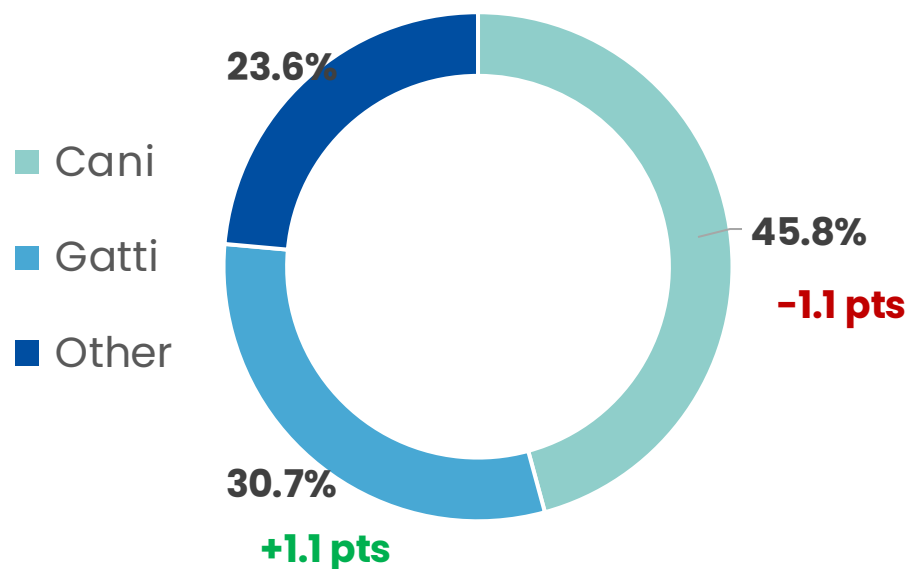
↓ -6.6% YoY



Evolving Petcare preferences on Amazon.it

Dogs lead in searches, cats drive growth with humanized care

Estimated searches on Amazon.it in 2024



Keyword	Ricerche	Crescita
<input type="checkbox"/> spazzola a vapore per gatti	342K	↑ 434.4%
<input type="checkbox"/> spazzola vapore gatti	75K	↑ 212.5%
<input type="checkbox"/> spazzola gatti vapore	21K	↑ 320%
<input type="checkbox"/> spazzola per gatti a vapore	12K	↑ 300%

Evolving Petcare preferences on Amazon.it



Dogs lead in searches, cats drive growth with humanized care

Prodotti per animali domestici

Passeggini per cani

Periodo

Ultimi 12 mesi

Go to report page

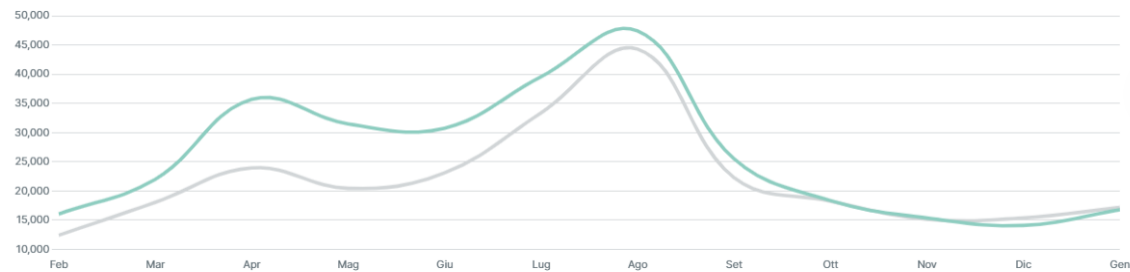
Ricerche

313K ↑ 18.6% YoY

Scarica immagine

Condividi

Anno corrente Anno precedente



tapis roulant per cani

Ultimi 12 mesi

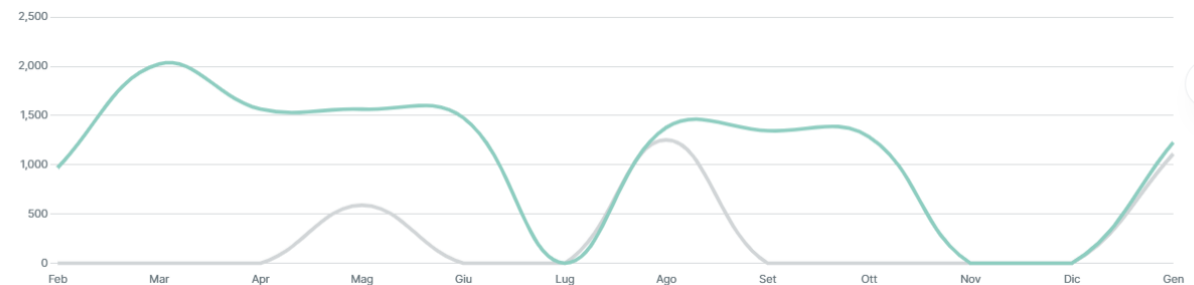
Ricerche

13K ↑ 333.3% YoY

Scarica immagine

Condividi

Anno corrente Anno precedente

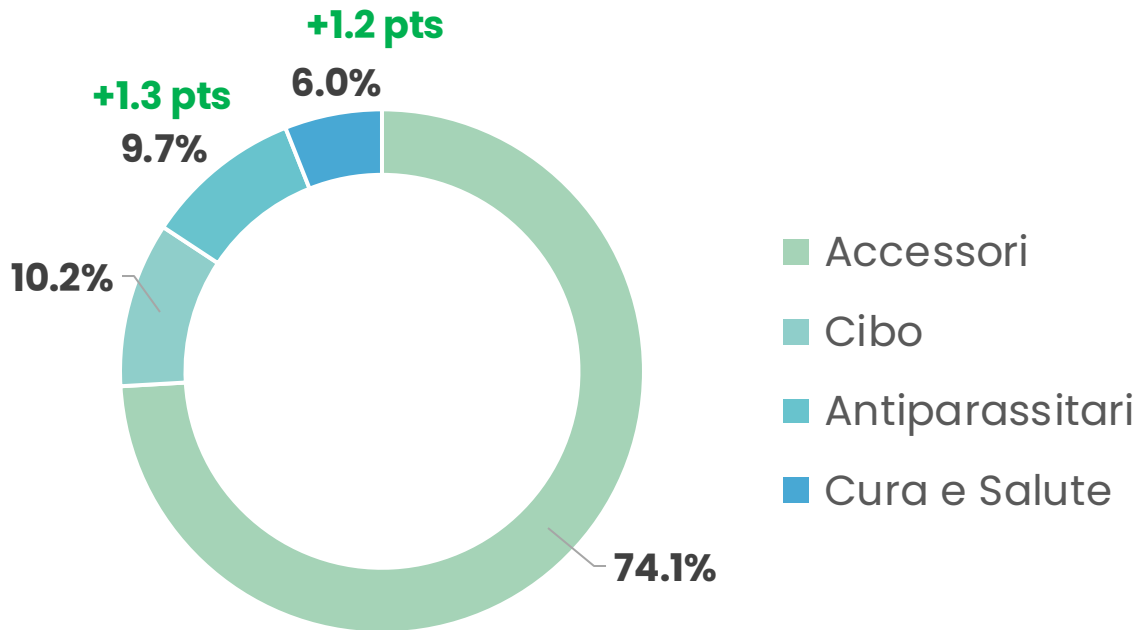


Rising demand for pet health products on Amazon.it



Amazon shifts from accessories to wellness products

Estimated searches on Amazon.it in 2024



Digestivi per cani

probiotici per cani

1.1Mln

Ricerche 210K

↑ 109.7%

Integratori e vitamine per cani

1.4Mln

↑ 42.3%

redonyl ultra 150 mg cane

35K

↑ 45.8%

zylkene gatto

26K

↑ 1.200%

olio salmone per cani

21K

↑ 31.3%

Interactive games trend

Keyword	Ricerche	Crescita
giochi interattivi per cani	51K	0%
giochi interattivi per gatti	48K	↑ 29.7%
giochi gatto interattivi	34K	↑ 30.8%
palla interattiva per cani	33K	↑ 153.8%
gioco gatto interattivo	32K	↑ 23.1%
gioco interattivo gatto	31K	↑ 55%
pallina interattiva per cani	28K	↑ 100%

Human health leaders enter petcare

Omegor's Omega-3 for pets: a catalyst for market growth

Scelta Amazon



OMEGOR[®]
PET

90%
OMEGA 3

Integrativo con vitamine
per cani e gatti con
omega-3 EPA e DHA
da olio di pesce

Vigore ed energia | Trattamento cutaneo e del pelo | Benessere del cuore

60 capsule

U.G.A.
Nutraceutici

Sponsorizzato

OMEGOR Pet Omega 3 per Cani e Gatti con EPA e DHA da Olio di Pesce Purificato - 60 Capsule di Omega3 IFOS Certificato per la Salute del P...

★★★★★ 150

500+ acquistati nel mese scorso

14⁹⁰ €



**NUTRIENTI FONDAMENTALI
PER IL BENESSERE E LO
SVILUPPO DI CANI E GATTI**

- Vigore ed energia
- Salute delle articolazioni
- Salute cutanea e del pelo
- Benessere del cuore

I clienti dicono

I clienti sono soddisfatti dell'integratore per animali. Affermano che migliora la qualità del pelo, rendendolo più morbido, lucente e con un buon rapporto qualità-prezzo. Inoltre, ne apprezzano l'efficacia nel prevenire la perdita di pelo.

Generati dall'IA a partire dal testo delle recensioni dei clienti

Selezione per maggiori informazioni

✓ Qualità | ✓ Qualità del pelo | ✓ Rapporto qualità-prezzo | ✓ Efficacia | ✓ Perdita del pelo

Advertising on Amazon

Maximizing reach and engagement across the platform

Search Advertising

- Focuses on consideration and purchase phases.
- Drives sales and boosts discoverability for new products.
- Engages customers from Display Advertising campaigns.

Display Advertising

- Retail-centric solution for on and off Amazon reach.
- Utilizes programmatic advertising with first-party insights.
- Accesses exclusive inventory for broader audience reach.
- Delivers banners and videos on and off Amazon.

SPONSORED BRAND

SPONSORED PRODUCTS

SPONSORED BRAND VIDEO

The screenshot displays Amazon search results for 'Scalibor' flea collars. At the top, a 'SPONSORED BRAND' banner features a woman smiling with a dog. Below it, a grid of 'SPONSORED PRODUCTS' includes various Scalibor and Seresto collars with their respective prices and ratings. At the bottom, a 'SPONSORED BRAND VIDEO' shows a dog with a Scalibor collar and text indicating '12 MESI' and '8 MESI' of protection.

Targeting pet lovers on Amazon

Harnessing data to connect with engaged pet consumers

- Optimize customer journey to **deliver the right product at the right** time using data insights.
- PET consumers are primarily **women aged 25-44**, interested in **natural and organic products**.
- Purchasing habits favor **sustainable, eco-friendly**, and **premium** products.
- Largest audiences are for **dog products**, highlighting a trend towards **pet accessories**.

Audience: LS - Animali domestici IT

Status: Active Data provider: Amazon

ID 364593731996878646

Description Persone i cui interessi commerciali indicano uno stile di vita connesso alla cura di animali domestici

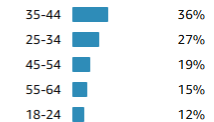
Category Interest
Pets & Animals > Pets

Overlapping audiences Demographic insights Retail insights Media insights

Gender



Age



Overlapping audiences Demographic insights Retail insights Media insights

Filter by category: Interest Reset Download report

Category	Overlapping audience	Overlap %	Forecasted daily reach	Affinity
Interest	LS - Cibo per animali con ingredienti naturali	5%	300K-350K	3.76x
Interest	LS - Cibo per animali	84%	4.5M-5M	3.39x
Interest	LS - Bevande sostitutive del latte	2%	100K-150K	2.46x
Interest	LS - Forniture medico professionali	4%	450K-500K	2.2x
Interest	LS - Cibo etnico	5%	500K-600K	2.15x
Interest	LS - Animali domestici IT	4%	350K-400K	2.09x
Interest	LS - Alimenti biologici	4%	450K-500K	2.08x
Interest	LS - Tè, tisane e infusi a base vegetale	10%	1M-1.5M	1.98x
Interest	LS - Ecologisti	24%	2.5M-3M	1.97x

Thank you!

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