

## **Indonesia Pet Food Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)**

Market Report | 2023-01-23 | 120 pages | Mordor Intelligence

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### **Report description:**

The Indonesian pet food market is projected to register a CAGR of 5.2% during the forecast period (2022-2027). As an impact of COVID-19, the Indonesian pet food market experienced positive growth. Due to the pandemic scenario and lockdown imposed by the government, pet owners prefer to stay at home, spending more of their time nurturing and pampering their pets. The awareness of healthy living has motivated pet owners to spend on buying protein-rich, nutritious customized pet foods for their pets.

Indonesia is one of the rapidly emerging South-Asian economies, and the growth is fuelled by the rapidly increasing urbanization and industrial rate. This demographic change is very crucial to the future growth of the pet food market. The humanization of pets has become a new trend in the Indonesian nuclear household. This was further boosted by increasing single-populations who preferred to have a pet companion along with them. Larger low middle-income group Indonesian populations are favoring the growth of economic pet foods. The major constraint offered by the region is that owning a dog is a limitation among the Muslim population of Indonesia, which comprises 86.7% of the total population, according to the World Population Review. A larger cat population can be witnessed in the country compared to the dogs. The rise in internet sales and the growth of e-commerce are important in convenience-oriented pet food markets.

### **Indonesia Pet Food Market Trends**

#### **Pet Humanization is Influencing the Purchase Decision**

Pet humanization is a result of rising income, changing demographic patterns, and consumer preferences. Though the per capita GDP of the country declined by 2% due to the Covid-19 crisis in 2020, the pet industry witnessed growth due to the behavioral

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change that occurred during the lockdown period. There has been a shift toward pet 'parenting' from 'ownership', which influenced the purchasing decisions of pet products. Furthermore, the rise in income led to more imports of pet foods for retail sale in Indonesia. Consumers demanded clearly defined clean labels due to increasing health consciousness for their pets. Currently, pet owners are resolute about knowing the food constituent information of the various pet food products. As a result, some pet food companies claim transparency in the sourcing and processing of ingredients. As consumers become progressively more concerned about their health, particularly in relation to their diet, similar concerns about the diets of their pets are increasing significantly. Furthermore, they highly prefer natural and organic products. Owners who are highly involved with their pets spend a large amount on pet food and other pet care products. Moreover, in Indonesia, the growth of premium and super-premium pet foods is primarily driven by the humanization of pets.

#### Import is Dominating the Indonesian Pet Food Market

According to the International Trade Centre (ITC), in 2020, the import of pet food in Indonesia was valued at USD 119.8 million. Thailand, China, France, and the United States are the major exporters of pet food in Indonesia for retailing, with Thailand holding 70% of the export. The import from Thailand increased by 22.1% in 2020. The Indonesia Pet Food Market comprises 95% of the international brands, and only 5% of the share goes to the local players in the region. As pet food generally contains products of animal origin, its production facility must be approved by the Ministry of Agriculture, c.q. Directorate General of Livestock and Animal Health Services before an importer can import from the pet food producing facility. There is an increasing trend for high-income consumers to feed their pets nutritionally balanced raw food diets. An increasing number of premium brands entered dog food in 2018, attracted by the sales potential offered by the intensifying humanization and premiumization trends. Black Hawk brand from Australia, which has a natural positioning and is produced using premium ingredients such as hormone-free chicken and pasture grazed lamb, entered the Indonesian Pet food market in late 2018.

#### Indonesia Pet Food Market Competitor Analysis

The Indonesian pet food market is fairly consolidated, with a few major players dominating the market. International brands accounted for over 95% of the Indonesian pet food market, while local brands summed up the remaining 5%. Nestle Purina, with its dominant presence in both cat and dog food segments, is the leader in the Indonesia Pet food market share. Mars Indonesia closely followed Nestle holds the remaining major market share. The other market players include international companies such as Holistic select, Ecotriton, Total ailments, Wellness Pet Food, Natural Life, Nutro Choice, and Nutrisource. Local products such as Feli Cat, Vittamax, and My Dear Cat are slowly gaining prominence due to their higher discounts on online retail channels.

#### Additional Benefits:

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

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