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Asia Pacific Dog Food - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2017 - 2029

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Report description:

The Asia Pacific Dog Food Market size is estimated at USD 16.37 billion in 2024, and is expected to reach USD 26.30 billion by 2029, growing at a CAGR of 9.95% during the forecast period (2024-2029).

The food segment dominated the product types as they are a primary source of nutrition as a staple

- In Asia-Pacific, dogs are the major pets dominating the pet food market due to the higher consumption of commercial pet food and high population. In 2022, dogs held 47.7% of the region's pet food market. There was a significant increase of 61.9% between 2017 and 2022 due to the rising number of dog owners and the increasing demand for premium products in the region. For instance, the dog population grew by 16.7% in 2022 compared to 2017. China, Japan, and Australia are the major countries in the region's pet food market, together accounting for 60% in 2022.
- The food segment dominated the dog food market with a market value of USD 9.2 billion in 2022. This is because food is a staple purchase for most pet owners in the country, regardless of their dog breed size or age. The dog food market in the country is estimated to register a CAGR of 9.9% during the forecast period.
- The treats segment was the second-largest segment, with a market value of USD 2.7 million in 2022, followed by veterinary diets (USD 1.4 billion) and nutraceuticals/supplements (USD 494.5 million). This is because specialized pet foods help address specific health conditions in pets, and they support the well-being of the animals through proper nutrition. However, treats are the fastest-growing dog food segment in the region, with an estimated CAGR of 10.8% during the forecast period due to their advantages, such as positive reinforcement during training sessions, a source of mental stimulation and entertainment, providing special indulgence, and strengthening the bond between the pet and its parent.
- The increasing pet population and the various benefits offered by the wide range of commercial pet products are anticipated to

drive the market during the forecast period.

China and Japan were the major countries with increasing usage of commercial pet foods in the region

- Asia-Pacific is one of the largest dog food markets globally, accounting for USD 14 billion in 2022 due to the rising pet humanization. The Asia-Pacific dog food market grew by 61.9% between 2017 and 2022, associated with the increasing usage of commercial dog food products and the growing premiumization in the region.
- In Asia-Pacific, China had the largest dog food market, accounting for USD 4.2 billion in 2022. The higher share of the country was due to its higher dog population and higher expenditure on dog food in the same year. For instance, the country's dog population accounted for 43.8% of the region's dog population in 2022.
- Japan and Australia are the major countries in the Asia-Pacific dog food market, accounting for USD 2.6 billion and USD 1.5 billion in 2022, respectively. This growth can be due to the increasing usage of premium food products and higher dog populations. However, the increasing adoption of dogs in the Philippines and India is estimated to drive the growth of these countries during the forecast period, with CAGRs of 17.6% and 15.2%, respectively.
- The major dog food markets in the Rest of Asia-Pacific include Singapore, South Korea, Hong Kong, Bangladesh, and Pakistan. The Rest of Asia-Pacific accounted for 22.1% of the Asia-Pacific dog food market in 2022. The regional segment grew by 35.7% between 2017 and 2021, mainly due to the growing pet humanization and the increasing adoption of commercial dog food.
- Therefore, the increasing dog adoption and the rising premiumization are projected to drive the Asia-Pacific dog food market at a CAGR of 8.9% during the forecast period.

Asia Pacific Dog Food Market Trends

The higher life span and the evolution of the pet ecosystem are helping in the growth of the dog population as pets in the region

- Dogs have a higher share of the pet population, and they account for 34.3% of the pet population in Asia-Pacific. The dog population is higher as people feel more secure in their homes with dogs as pets and companionship. For instance, Pet parents in China treat their pets, including dogs, as their family and child accounted for 82.8% in 2020. These factors also resulted in an increase in the dog population as pets in the region by 16.58% between 2017 and 2022. The adoption of dogs increased during the pandemic, and it is expected that there will be a rise in adoption in the future as dogs have a high life span and an inherent ability to adjust with pet parents. The most common dog breeds adopted in Asia, particularly China, are Siberian Husky, the Chinese field dog, and Poodle. For instance, in 2021, the Siberian Husky accounted for 16% of the dogs adopted in China.
- In 2022, China and India had the highest dog populations in Asia-Pacific as these countries witnessed a rise in the adoption rate of dogs and also a rise in pet humanization with an increase in income levels and urbanization. There is also a shift in the adoption rate of dogs in rural areas with the increased availability of pet food and also increasing adoption of pets. Moreover, there are places in Asia-Pacific without restrictions to take pets, such as dogs, due to the evolving pet ecosystem. For instance, in India, Head Up For Tails has pet stores that offer products and sales of products, such as pet food, pet grooming, and other services. With the higher life span, pet parents treat them as family members, and the evolution of the pet ecosystem is helping to increase the dog population as pets in the region.

Increased demand for premium products for dogs, such as grain-free products and natural products, is due to increasing pet expenditure

- In Asia-Pacific, there has been a rise in pet expenditure because of factors such as an increase in pet humanization, leading to the demand for commercial pet food, availability of different types of pet food, and pet parents' preference for good quality premium pet food as they are willing to pay premium prices. Traditionally, there has been a higher number of pet dogs with a higher expenditure share, accounting for 38.1% of the total pet expenditure in 2022. For instance, in Australia, dog food accounted for 40% of the country's pet expenditure in 2022, as dogs are most popular in Australia, and about 40% of the households had a pet dog in 2022.
- In Asian countries such as China, India, and Australia, pet parents are also investing in the well-being of pets, including dogs, by providing them with additional services such as pet grooming and pet walking. Additionally, they feed their pet dogs with special products such as pet treats and nutraceutical supplements and provide good veterinary diets in their initial days. For instance, in India, pet parents feed their dogs with treats from brands such as Pedigree and Royal Canin, and about 65-70% of the dog expenditure (USD 624) is toward food and treats, whereas 20% is for other expenses such as pet grooming and pet daycare.
- The growing awareness about different types of dog food available in the market for health concerns, treating their dogs as family members, and growing premiumization are the factors expected to help increase pet expenditure in the region during the forecast period.

Asia Pacific Dog Food Industry Overview

The Asia Pacific Dog Food Market is fragmented, with the top five companies occupying 18.10%. The major players in this market are ADM, Colgate-Palmolive Company (Hill's Pet Nutrition Inc.), General Mills Inc., Mars Incorporated and Nestle (Purina) (sorted alphabetically).

Additional Benefits:

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

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