

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

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### **Report description:**

The Asia-Pacific Pet Food Market size is estimated at USD 34.15 billion in 2024, and is expected to reach USD 53.25 billion by 2029, growing at a CAGR of 9.29% during the forecast period (2024-2029).

Dogs held the largest market share, and growing pet humanization is driving the Asia-Pacific pet food market

- The Asia-Pacific pet food market is experiencing significant growth, mainly attributed to the growing pet population in the country, which increased from 442.2 million in 2017 to 511.1 million in 2022. The increasing pet humanization has also contributed to market growth.
- Among pets, dogs dominated the Asia-Pacific pet food market, accounting for 47.7% of the market share and valued at about USD 14.0 billion in 2022. This can be attributed to the larger population of dogs compared to other pet animals in the region, accounting for 34.4% of the pet population during the same year. The higher consumption rate of pet food by dogs compared to other pets contributes to their dominant market presence.
- Cats hold the second-highest market share within the Asia-Pacific pet food market, accounting for 34.0% of the market share in 2022. This significant market share of cats can be attributed to their substantial population in the region, which accounted for 26.1% of the pet population in the same year. The increasing pet cat population in the region and their adaptability to small living spaces compared to dogs are expected to drive the cat food market and emerge as the fastest-growing segment, with a CAGR of 10.4% during the forecast period.
- Other pets, such as birds, fish, and rodents, accounted for 18.3% of the market value in 2022, despite the other pet population being 39.5% of the total pet population. The smaller body size and lower food consumption of these pets contribute to their relatively smaller market share in the Asia-Pacific pet food market.

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- The growing pet population in the region, coupled with pet humanization, is anticipated to drive the pet food market in Asia-Pacific during the forecast period.

China had the major share of the pet food market due to growing urbanization and the increasing number of millennial and Gen Z generations adopting pets, increasing the usage of commercial pet foods

- Asia-Pacific has rapidly changed regarding pet humanization and premiumization during the past ten years. Pet parents used more commercial pet food products than home-cooked food and considered pets an integral part of the family. It is also one of the largest pet food markets globally and witnessed an increase of 45.4% between 2017 and 2021. The increase in the market during the historical period was due to the growing pet population in the region by 12%, driving the usage of pet food products.

- In Asia-Pacific, China had a significant share of the pet food market, which accounted for USD 9.7 billion in 2022. The higher share of China was primarily because of its higher pet population, which was 53.9% of the pet population in the region in the same year. Additionally, the growing urbanization and increasing number of millennial and Gen Z generations adopting pets increased the usage of commercial pet foods.

- Japan and Australia also have a significant market share, accounting for USD 5.3 billion and USD 3.6 billion in 2022, respectively, owing to their higher pet population. The lesser market share of India, with a higher pet population than Japan in 2022, is because of pet parents' adoption of commercial pet foods in Japan.

- However, the Philippines and India were growing faster regarding the pet food market in the region at CAGRs of 18.8% and 17.3% during the forecast period, respectively. It is because of the growing adoption of pets among younger adults, which is expected to increase the usage of commercial pet food products.

- The increasing pet adoption and pet humanization are the factors expected to drive the pet food market in the region at a CAGR of 9.3% during the forecast period.

#### Asia-Pacific Pet Food Market Trends

A new purchase ecosystem is evolving in the region, such as pet cafes and pet stores, providing assistance from purchasing to taking care of the animals through a wide variety of cat food products and services driving population of cats

- In Asia-Pacific, cats have a lower share compared to dogs, and they accounted for 26.1% of the pet population in 2022. Countries such as China, India, and Australia have witnessed an increase in pet ownership due to health benefits such as feeling relaxed and less stressed and considering them as their companions. Therefore, the cat population as a pet increased by 0.28% between 2017 and 2022.

- Cat parents are higher than dog parents in countries such as Indonesia and Malaysia. In Indonesia and Malaysia, it accounted for 47% and 34%, respectively, in 2021 because of the religious culture of these countries, and they prefer to adopt cats as pets than dogs. This will help the companies to invest more in cat food in these countries than dog food. In China, there has been an increase in the number of pets, including cats, in urban areas, and the pet population, including cats, increased by 10.2% between 2018 and 2020 to reach a pet population of 100.8 million in urban areas in 2020. Moreover, the cat population increased from 74.4 million in 2020 to 82.5 million in 2022 because of a rise in companionship during the pandemic. Also, it will have long-term effects as the life span of cats is more than 20 years.

- A new pet adoption and purchase ecosystem is evolving in the region as there are pet cafes and pet stores providing assistance from purchasing to taking care of the animals through a wide variety of pet food products and services. For instance, in Vietnam, The Meow House by R House is a cat cafe that serves vegetarian and vegan food and is a home for cats. Factors such as the rise

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in the adoption of cats due to health benefits, the culture of the Asia-Pacific, and changes in the pet ecosystem help in enhancing cat adoption in the region.

Increased demand for premium products for dogs, such as grain-free and natural products, is 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 feeding of pets with commercial pet food, availability of different types of pet food, and pet parents preferring good quality premium pet food as they are willing to pay premium prices. Moreover, pet dogs have a higher expenditure share as they accounted for 38.1% of the pet expenditure in 2022 because dog owners feed them high-quality pet food and higher consumption of food by dogs compared to other pets. 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, which increased the demand for premium products for dogs such as grain-free products and natural products.

- China, India, and South Korea are the major pet markets in the region, as there has been growth in pet expenditure. These countries have witnessed a high number of pets being fed good quality premium pet food, especially after the pandemic, as they are more aware of the nutritional requirement for their pet's good health. For instance, in the Hong Kong cat food market, the premium pet food segment accounted for 75% of the pet food sales in 2022. There are high online sales of pet food, especially in China, due to the vast number of products available on the website and easy to order. For instance, in 2022, China's pet sales from online channels were 58.3% compared to the pet stores channel's contribution of 28.1%.

- The rising demand for pet food and growing awareness about good quality food for their pets has increased the pet expenditure by pet parents in the region during the study period.

#### APAC Pet Food Industry Overview

The Asia-Pacific Pet Food Market is fragmented, with the top five companies occupying 13.57%. 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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