Australia Pet Food - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2017 - 2029

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Report description:

The Australia Pet Food Market size is estimated at USD 3.79 billion in 2024, and is expected to reach USD 4.57 billion by 2029, growing at a CAGR of 3.81% during the forecast period (2024-2029).

Dogs dominate the Australian pet food market due to their high population as pets in the country

- Australia is one of the most pet-loving countries globally, where pet parents consider pets an integral part of their family, thereby increasing the pet humanization trend in the country. In 2022, Australia accounted for 12.2% of the pet food market in Asia-Pacific, making it the third-largest country in the region. Most of the pet parents in Australia belong to the younger population group. For instance, in 2021, 70% of pet owners were Gen Zs in Australia.
- Even though Australia faced several problems, including drought, wildfires, and the COVID-19 pandemic in 2020, the pet food market in Australia grew by 17.2% between 2017 and 2021. This growth is associated with higher levels of pet humanization and increased pet adoption during the same period.
- In Australia, dogs have the major share of the pet food market, accounting for USD 1.6 billion in 2022. The higher share of dogs was because of their higher population, which accounted for 22.2% of Australia's pet population in 2022. Dogs are compatible with the climate and also suit the outdoor lifestyle of pet parents in the country, which is estimated to make dogs the fastest-growing pet segment, with a CAGR of 4.4% during the forecast period.
- Other animals and cats were major pets after dogs in 2022, where fish and birds were most adopted and found in the majority of households. They have a calming effect, stimulating the mental health of the entire house, thus making other pets the fastest-growing segment after dogs, with a CAGR of 3.3% during the forecast period.
- Thus, pet humanization and increasing pet adoption are estimated to drive the pet food market in Australia, which is expected to

register a CAGR of 3.8% during the forecast period.

Australia Pet Food Market Trends

Cats are the second-most adopted pets in the country due to a rise in the need for companionship during the pandemic

- The cat is the second most popular pet in Australia, and the country has witnessed an increase in the cat population. There is a trend of an increase in the adoption of cats by the people of Australia for the past five years. This trend is due to the increase in pet humanization, cats being able to live in smaller spaces compared to dogs, the need for companionship during the pandemic, increasing urbanization, and the fact that they can be kept indoors without feeling cooped up.
- The country has less number of cat owners as compared to dog owners, but the average cat per household is more than that of dogs. For instance, in 2022, the households owning a cat accounted for 33.3% of the total households having a pet, and the average cat per household was 1.6, whereas the average dog per household was 1.3. Additionally, the country witnessed an increase in the number of homes owing cats from 2.6 million in 2019 to 3.3 million in 2022 due to a rise in the need for companionship during the pandemic. The effect of the pandemic is anticipated to be witnessed for 5-10 years as the average lifespan of cats is more than 20 years.
- The cat as a pet is being acquired by different channels such as animal shelters, friends, breeders, pet stores, and vets. An animal shelter is the acquisition channel used mostly by potential pet parents in the country because of the unbiased opinions, and they disclose all known health problems to potential adopters before releasing an animal for adoption. For instance, in 2022, animal shelters accounted for 28%, whereas pet shops accounted for 11%. Additionally, the purchase of cats from pet stores increased from 8% in 2019 to 11% in 2022 due to increasing disposable income, and the demand for pets was high during the pandemic.

The growing awareness of the nutritional requirements of pets and the increasing trend of pet premiumization are driving the expenditure in the country

- Australia has been witnessing an increase in pet expenditure during the study period. The increase in pet expenditure can be attributed to growing awareness about specialized pet food and providing different types of pet food, such as snacks, dry pet food, and wet pet food to their pets. These contributed to increasing pet expenditure by 25.3% between 2017 and 2022. Dogs have a higher share than cats and other animals because large-sized dogs consume a high amount of dog food, are more allergic to different foods, and have a higher amount being spent on veterinary products as they are customized diets.
- There are different types of expenses incurred by the pet parents. The different expenses include pet food expenses, pet insurance, veterinary costs, and services such as pet grooming, pet walking, and pet daycare. Pet food has the highest share of the pet expenses incurred by pet parents in the country as the pet parents are procuring products sold under premium brands such as Royal Canin and Purina, growing awareness about different nutrients required by pets, and rising disposable income. For instance, pet food expenses accounted for 30% in 2019, which increased to 51% in 2022.
- Pet parents of dogs and cats have shifted from buying pet food from supermarkets to online stores. For instance, 74% of dog food purchases from supermarkets in 2019 decreased to 64% in 2022, and online sales accounted for 30% in 2022. This change in

buying patterns is due to the convenience of buying pet food from anywhere.
- Pet expenditure is expected to increase in the country during the forecast period because of the rise in awareness of the nutritional requirements of pets, changes in buying patterns, and growing pet premiumization.

Australia Pet Food Industry Overview

The Australia Pet Food Market is fragmented, with the top five companies occupying 24.59%. The major players in this market are Colgate-Palmolive Company (Hill's Pet Nutrition Inc.), EBOS Group Limited, Mars Incorporated, Nestle (Purina) and Real Pet Food Co. (sorted alphabetically).

Additional Benefits:

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

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