

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

Market Report | 2024-02-17 | 283 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

Report description:

The Indonesia Pet Food Market size is estimated at USD 1.61 billion in 2024, and is expected to reach USD 3.19 billion by 2029, growing at a CAGR of 14.65% during the forecast period (2024-2029).

Cats held the major share due to the higher population driven by religious beliefs and low maintenance requirements

- In Indonesia, the pet ownership rate has been steadily growing as the country's economy is rapidly advancing, driven by increasing urbanization and industrialization. With increased exposure to Western cultures, urbanization, and the spread of the internet and social media, there has been a growing interest in keeping pets as companions. As a result, the pet population in Indonesia has seen a significant growth of 75.7% between 2017 and 2022.
- Cats are the most popularly owned pets in Indonesia, with a population of 5.1 million in 2022. This is because cats are gaining popularity as pets due to their low maintenance requirements and cost-effectiveness compared to other pets. As a result, the cat food market accounted for the largest share, with a value of USD 778.9 million in 2022, and is estimated to grow at the fastest rate, with a projected CAGR of 18.7% during the forecast period. This growth is driven by the increasing cat population in the country, which had a significant growth of 137.6% between 2017 and 2022.
- The dog ownership rate in Indonesia is low due to religious and cultural beliefs. Many of the Muslim households in Indonesia do not prefer dogs as pets. As a result, dogs were owned by 10% of Indonesian households. Therefore, the dog food market could reach a value of USD 124.3 million in 2022.
- Other animals have unique nutritional requirements that need to be fulfilled through specialized pet food products. As a result, the other animal pet food segment increased by USD 103.0 million between 2017 to 2022.
- The growing population of pets and the growing trend of pet humanization in the country are estimated to drive the pet food

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

market during the forecast period.

Indonesia Pet Food Market Trends

The adaptability to smaller living spaces, the increasing trend of cat cafes, and the cost-effectiveness have resulted in cats being the major pets in the country

- Cats are the most popular pets in Indonesia, accounting for 65.4% of the total pet population in 2022. This can be attributed to the fact that approximately 80.0% of the population follows the Islamic faith, which encourages keeping cats as pets, as they are the favored animals of the Prophet. In contrast, Islamic culture considers dogs unclean and does not permit keeping them as pets. The cost-effectiveness of owning cats, requiring less food and veterinary care than dogs, adds to their popularity.
- There has been an upsurge in the overall pet cat population in the country, which increased by about 70.0% between 2019 and 2022. This is primarily attributed to the impact of the COVID-19 pandemic-induced lockdowns and movement restrictions. People found themselves spending significantly more time at home and seeking companionship, leading to a higher demand for pets, including cats.
- As of 2022, the number of pet cats in the country surpassed that of pet dogs, with the pet dog population being 619.3% less than the pet cat population. There has been a significant increase in the percentage of households that own cats. As of 2022, 47.0% of households in the country had at least one cat. Additionally, people between the ages of 16 and 24 own 70.0% of the pet cat population. This trend is because of the desirable characteristics of cats, such as their ability to adjust to small spaces and their unique personalities. There has been an increasing trend of cat cafes in the country, where customers can enjoy a beverage or a meal while interacting with cats in a comfortable and relaxing environment. These trends may boost the popularity of pet cats in the country, which is anticipated to reach 5.9 million by the end of 2026.

The increasing trend of pet humanization and greater demand for premium products resulted in a rise in pet expenditure

- Indonesia is one of the largest pet food markets in Asia-Pacific. There is an increasing trend in pet food expenditure in the country, which increased by about 8.5% between 2019 and 2022. The increasing trend of pet expenditure is mainly due to the growing pet humanization, where pets are treated as a part of the family, and people are increasingly willing to invest in their pets' well-being and comfort.
- In 2022, the cat population in the country was more than 619.3% higher compared to dogs. However, the pet expenditure of one dog per year is 17.6% greater compared to the pet expenditure of one cat per year. This is mainly due to the large size of the dogs and their ability to consume more food compared to cats. The pet food expenditure on dogs increased by about 22.2%, while for other pet animals, it increased by about 8.5% between 2019 and 2022.
- Even though there is an increased demand for premium pet food products in the country, the economy pet food product sales are growing at a faster rate. For instance, the retail sales of economy dry cat food registered a CAGR of 34.4%, while premium dry cat food registered a CAGR of 30.2% between 2016 and 2021. This trend may be due to pet owners' decreased income and increased pet food prices, which made many Indonesian consumers more price-sensitive. However, premium brands such as Royal Canin and Sheba register more demand in the country.

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- In Indonesia, offline retail stores were the top choice for buying pet food in 2022, representing 68% of the total sales, while e-commerce accounted for 32%. The growing awareness of the benefits of high-quality pet food and the increasing premiumization of pet food are expected to continue driving pet expenditure in the country over the coming years.

Indonesia Pet Food Industry Overview

The Indonesia Pet Food Market is fragmented, with the top five companies occupying 25.16%. The major players in this market are Colgate-Palmolive Company (Hill's Pet Nutrition Inc.), EBOS Group Limited, FARMINA PET FOODS, Mars Incorporated and Nestle (Purina) (sorted alphabetically).

Additional Benefits:

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

Table of Contents:

1 EXECUTIVE SUMMARY & KEY FINDINGS

2 REPORT OFFERS

3 INTRODUCTION

3.1 Study Assumptions & Market Definition

3.2 Scope of the Study?

3.3 Research Methodology

4 KEY INDUSTRY TRENDS

4.1 Pet Population

4.1.1 Cats

4.1.2 Dogs

4.1.3 Other Pets

4.2 Pet Expenditure

4.3 Regulatory Framework

4.4 Value Chain & Distribution Channel Analysis

5 MARKET SEGMENTATION (includes market size in Value in USD and Volume, Forecasts up to 2029 and analysis of growth prospects)

5.1 Pet Food Product

5.1.1 Food

5.1.1.1 By Sub Product

5.1.1.1.1 Dry Pet Food

5.1.1.1.1.1 By Sub Dry Pet Food

5.1.1.1.1.1.1 Kibbles

5.1.1.1.1.1.2 Other Dry Pet Food

5.1.1.1.2 Wet Pet Food

5.1.2 Pet Nutraceuticals/Supplements

5.1.2.1 By Sub Product

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 5.1.2.1.1 Milk Bioactives
- 5.1.2.1.2 Omega-3 Fatty Acids
- 5.1.2.1.3 Probiotics
- 5.1.2.1.4 Proteins and Peptides
- 5.1.2.1.5 Vitamins and Minerals
- 5.1.2.1.6 Other Nutraceuticals
- 5.1.3 Pet Treats
 - 5.1.3.1 By Sub Product
 - 5.1.3.1.1 Crunchy Treats
 - 5.1.3.1.2 Dental Treats
 - 5.1.3.1.3 Freeze-dried and Jerky Treats
 - 5.1.3.1.4 Soft & Chewy Treats
 - 5.1.3.1.5 Other Treats
- 5.1.4 Pet Veterinary Diets
 - 5.1.4.1 By Sub Product
 - 5.1.4.1.1 Diabetes
 - 5.1.4.1.2 Digestive Sensitivity
 - 5.1.4.1.3 Oral Care Diets
 - 5.1.4.1.4 Renal
 - 5.1.4.1.5 Urinary tract disease
 - 5.1.4.1.6 Other Veterinary Diets
- 5.2 Pets
 - 5.2.1 Cats
 - 5.2.2 Dogs
 - 5.2.3 Other Pets
- 5.3 Distribution Channel
 - 5.3.1 Convenience Stores
 - 5.3.2 Online Channel
 - 5.3.3 Specialty Stores
 - 5.3.4 Supermarkets/Hypermarkets
 - 5.3.5 Other Channels

6 COMPETITIVE LANDSCAPE

- 6.1 Key Strategic Moves
- 6.2 Market Share Analysis
- 6.3 Company Landscape
- 6.4 Company Profiles
 - 6.4.1 Adabi Consumer Industries Sdn Bhd
 - 6.4.2 ADM
 - 6.4.3 Colgate-Palmolive Company (Hill's Pet Nutrition Inc.)
 - 6.4.4 EBOS Group Limited
 - 6.4.5 FARMINA PET FOODS
 - 6.4.6 Mars Incorporated
 - 6.4.7 Nestle (Purina)
 - 6.4.8 PLB International
 - 6.4.9 Schell & Kampeter Inc. (Diamond Pet Foods)
 - 6.4.10 Vafo Praha, s.r.o.

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

7 KEY STRATEGIC QUESTIONS FOR PET FOOD CEOS

8 APPENDIX

8.1 Global Overview

8.1.1 Overview

8.1.2 Porter's Five Forces Framework

8.1.3 Global Value Chain Analysis

8.1.4 Market Dynamics (DROs)

8.2 Sources & References

8.3 List of Tables & Figures

8.4 Primary Insights

8.5 Data Pack

8.6 Glossary of Terms

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

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

Market Report | 2024-02-17 | 283 pages | Mordor Intelligence

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scott's-international.com

ORDER FORM:

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scott's-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-02-20"/>
		Signature	

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scott's-international.com

www.scott's-international.com

