

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

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Report description:

The Japan Pet Food Market size is estimated at USD 5.58 billion in 2024, and is expected to reach USD 6.84 billion by 2029, growing at a CAGR of 4.16% during the forecast period (2024-2029).

Dogs dominate the Japanese pet food market with a 49.9% share due to their higher dietary needs

- Japan is one of the major pet food markets in Asia-Pacific. It accounted for an 18.0% share of the region's pet food market in 2022, which showed significant growth of 50.1% between 2017 and 2022. This growth was due to the country's changing economy and pet culture, such as increasing pet humanization and higher usage of commercial products, which are the factors driving the demand for pet food.

- The dog food segment holds the largest share of the country's pet food market, which accounted for USD 2,636.6 million in 2022, and it is anticipated to reach USD 3,589.4 million in 2029. This significant share and growth is associated with many pet owners shifting from home-cooked food to commercial pet food in the country. Dogs consume more food than other pets due to their higher dietary needs. There is a growing trend toward premium dog food products in the country.

- Cats held the second-largest share in the country's pet food market, which accounted for 40.6% in 2022, and it is anticipated to record a CAGR of 3.6% during the forecast period. This is due to the increase in the cat population by 3.8% between 2017 and 2022, changing attitudes toward cats among pet owners, and the rise in popularity due to their low maintenance requirements and lower space.

- Other animals, such as birds, small mammals, rodents, and ornamental fish, have unique nutritional requirements that need to be fulfilled through specialized pet food products. Therefore, in 2022, the segment amounted to a market value of USD 499.9 million.

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- The increasing usage of commercial foods and changing economic and pet culture in the country are anticipated to drive the Japanese pet food market during the forecast period with a CAGR of 4.3%.

Japan Pet Food Market Trends

Japan's unique culture of cat cafes and cat islands is driving the market for adoption of cats in the country

- Cats have been a part of Japanese society for centuries and are highly regarded for their beauty, grace, and independence. The pet cat population is highest in Japan, which accounted for about 43.6% of the total pet population in the country in 2022. This larger pet cat population in the country is mainly due to their cultural significance, and it has been considered a symbol of good luck and prosperity for centuries.
- Additionally, Japan has a unique culture of cat cafes and has more than 11 cat islands, which have helped to popularize cats as pets. Cat cafes allow people to spend time with cats in a relaxed setting, while in cat islands, cats roam freely. Among all cat Islands in Japan, Aoshima Islands is well known for its large population of cats, which is significantly higher than the number of human residents, and the ratio of cats to people on the island ranges from 10:1 to as much as 36:1.
- However, the pet cat population in the country grew by 2.1% between 2019 to 2022. The primary factor restricting the pet cat population in Japan is the country's aging population, and it has the world's second-highest proportion of people aged 65 years and above. As people get older, they may find it more difficult to care for pets, leading to a decrease in pet ownership.
- There are also concerns about the welfare of cats in Japan, particularly regarding the high number of abandoned cats in pet shops and breeding facilities that prioritize profit over the well-being of cats. It is found that a minimum of 10 thousand cats die annually at pet shops and breeding facilities across Japan due to poor sanitation, negligence, and illness. All these factors are anticipated to result in a slow growth rate of the cat population during the forecast period.

Shift in the purchasing power of pet parents due to higher disposable income and pet humanization are increasing the pet expenditure

- Japan has been witnessing a trend of increasing pet expenditure because of growing premiumization and an increase in the prices of pet food products. For instance, in 2022, the prices of pet food products increased by 3%-10% as pet parents started purchasing high-priced premium pet food for their pets. Additionally, there has been a shift in the purchasing power of pet parents due to increasing disposable income and new varieties of pet food available in the market. These factors increased pet expenditure in the country by 24.6% between 2017 and 2022.
- Cats have a lower pet expenditure than dogs because cats consume less amount of pet food as compared to dogs. Therefore, there is less spending by cat owners compared to dog owners. For instance, in 2022, in the country, an average dog owner spent about USD 40 monthly on pet food for a dog, while cat owners have to spend about USD 32 monthly for a cat.
- Pet parents have been purchasing high-quality pet food for their pets as they treat them as family members. This trend of pet humanization has helped in the growth of premiumization as pet parents are purchasing more super-premium pet food products, with health and wellness concerns becoming their top priority during the COVID-19 pandemic. This has led to an increase in pet parents purchasing pet food products with ingredients that are sickness-preventive, allergen-free, vitamins/supplements fortified,

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gluten-free, low in carbohydrates, and high in protein. It helped premium pet food sales to increase by 3.7% between 2018 and 2019. A wide variety of product availability with price fluctuations and growing premiumization in the country are expected to help the growth of pet expenditure in the country during the forecast period.

Japan Pet Food Industry Overview

The Japan Pet Food Market is fragmented, with the top five companies occupying 30.01%. The major players in this market are Colgate-Palmolive Company (Hill's Pet Nutrition Inc.), INABA-PETFOOD Co. Ltd, Mars Incorporated, Nestle (Purina) and Unicharm Corporation (sorted alphabetically).

Additional Benefits:

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

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