

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

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Report description:

The Philippines Pet Food Market size is estimated at USD 292.20 million in 2024, and is expected to reach USD 681.32 million by 2029, growing at a CAGR of 18.45% during the forecast period (2024-2029).

Dogs held the major share due to higher usage of commercial food along with growing demand for premium and high-quality dog foods

- In 2022, the dogs segment was the dominant segment in the Philippines' pet food market, with a market value of USD 126.4 million. This dominance can be attributed to their large population in the country, accounting for approximately 29.3% (17.8 million) of the pet population. Due to the increasing dog population, there has been an increasing demand for premium and high-quality dog foods, driven by awareness among pet owners in the country. As a result, the dogs segment is projected to be the fastest-growing in the country, with a CAGR of 20.9% during the forecast period.
- Other pet animals, such as birds, fish, reptiles, and rodents, are 67% of the pet population in the Philippines. They accounted for 36% of the country's pet food market in 2022. This is because these pets are typically smaller in body size and, therefore, require relatively smaller amounts of food.
- Cats held a lower market share in the Philippine pet food market, valued at USD 8.5 million in 2022. However, the factor for the cats segment having a lower market demand compared to the dogs segment is their lower population. The pet cat population in the Philippines accounted for 3.5% of the pet population, which is significantly less than the dog population. Additionally, cats consume less food compared to dogs, which contributes to their relatively lower market demand.
- Due to the rise in pet ownership rates, especially during the pandemic, along with increasing awareness among pet owners and the growing demand for specialized diets to promote pets' health, the Philippines pet food market is projected to register a CAGR

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of 18.7% during the forecast period.

Philippines Pet Food Market Trends

The advantage of adaptability to smaller living spaces in apartments and the need for companionship during the COVID-19 pandemic drive the cat population as pets

- The pet cat population in the Philippines is relatively smaller than dogs and other pet animals, accounting for only 3.5% of the total pet population in the country in 2022. This limited share of pet cats can be attributed to the cultural preferences in the Philippines, where the nation generally has a stronger affinity for dogs. Additionally, negative cultural beliefs associated with cats, such as being associated with bad luck and evil spirits, have contributed to a perception that cats should be avoided or mistreated. Consequently, some individuals fail to provide proper care and shelter to cats.
- The pet cat population was 7.4 times less than the dog population in the country as of 2022. However, there was an increasing trend in the overall pet cat population in the country, which increased by about 10.5% between 2019 and 2022. This trend is mainly due to the growing trend of pet humanization. Cats can be the better option for living in small spaces like apartments, and the need for companionship during the pandemic resulted in higher popularity for cats as pets.
- Popular cat breeds for pets in the Philippines include Persian cats, British Shorthair, and Domestic Shorthair. The rural population owns a larger number of cats compared to the urban population, with the urban-rural pet cat population ratio standing at 46:54 as of 2022. As people's lifestyles and living spaces change, cats are increasingly seen as ideal companions for families, particularly those with children, as they are low-maintenance pets. These factors are expected to contribute to a further increase in the pet cat population during the forecast period, reflecting the evolving preferences and needs of pet owners in the Philippines.

The rise in premiumization and growing concerns about pet health increased the pet food expenditure

- There has been growth in pet expenditure in the Philippines. Pet expenditure increased by 23.1% between 2017 and 2022 because of the availability of different types of pet food and the rise in premiumization. Pet parents are purchasing premium-brand pet food for their pets due to the growing health concerns and to provide adequate nutrition to their pets. In 2022, dogs had a higher share (39.3%) than other pets, as a larger quantity of premium pet food for dogs was purchased than other pets. For instance, the sales of premium dry pet food for dogs increased from USD 36.6 million in 2021 to 39.2 million in 2022, whereas the sales of premium dry pet food for cats increased from USD 4.7 million in 2021 to USD 5.3 million in 2022.
- There is a trend of providing dogs with fresh food in the country, due to which the pet expenditure is lower than in other countries in Asia-Pacific. For instance, fresh food was fed to about 65% of the dog population in 2021.
- Pet food in the country is purchased from different channels, such as offline retailers, online retailers, and non-retailers, such as vet clinics. Offline retailers had the largest share in the country as the sales through offline retailers, such as grocery retailers, pet shops, and others, accounted for 84% of pet food sales. Sales through online retailers witnessed an increase from 9.9% in 2020 to 11.1% in 2021 as a result of the COVID-19 pandemic, the easy ordering process, and the availability of a large number of pet food products available on websites.
- The growing demand for premium pet food and growing concern for pets' health are anticipated to increase pet expenditure in

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the country during the forecast period.

Philippines Pet Food Industry Overview

The Philippines Pet Food Market is moderately consolidated, with the top five companies occupying 64.43%. The major players in this market are ADM, Charoen Pokphand Group, Colgate-Palmolive Company (Hill's Pet Nutrition Inc.), General Mills Inc. and Mars Incorporated (sorted alphabetically).

Additional Benefits:

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

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