

Pet Care in Indonesia

Market Direction | 2024-04-30 | 50 pages | Euromonitor

AVAILABLE LICENSES:

- Single User Licence €1750.00
- Multiple User License (1 Site) €3500.00
- Multiple User License (Global) €5250.00

Report description:

Pet care in Indonesia is maintaining positive value and volume growth in 2024, albeit the speed of growth is slowing down compared to the recent review period. The category saw exceptional growth in the period 2020-to-2021, due to the pandemic lockdowns inspiring pet ownership and the humanisation of pets whilst people were confined to their homes. That said, baseline demand continues, with cats proving to be the most popular pets. Cats are perceived as easier to look after than dogs, with owner...

Euromonitor International's Pet Care in Indonesia report offers a comprehensive guide to the size and shape of the market at a national level. It provides the latest retail sales data 2019-2023, allowing you to identify the sectors driving growth. It identifies the leading companies, the leading brands and offers strategic analysis of key factors influencing the market - be they new product developments, distribution or pricing issues. Forecasts to 2028 illustrate how the market is set to change.

Product coverage: Pet Food, Pet Products.

Data coverage: market sizes (historic and forecasts), company shares, brand shares and distribution data.

Why buy this report?

- * Get a detailed picture of the Pet Care market;
- * Pinpoint growth sectors and identify factors driving change;
- * Understand the competitive environment, the market's major players and leading brands;
- * Use five-year forecasts to assess how the market is predicted to develop.

Euromonitor International has over 40 years' experience of publishing market research reports, business reference books and online information systems. With offices in London, Chicago, Singapore, Shanghai, Vilnius, Dubai, Cape Town, Santiago, Sydney, Tokyo and Bangalore and a network of over 800 analysts worldwide, Euromonitor International has a unique capability to develop reliable information resources to help drive informed strategic planning.

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

Table of Contents:

Pet Care in Indonesia
Euromonitor International
April 2024

List Of Contents And Tables

PET CARE IN INDONESIA

EXECUTIVE SUMMARY

Pet care in 2024: Another positive value sales growth but slowing down
2024 key trends
Competitive landscape
Retailing developments
What next for pet care?

MARKET INDICATORS

Table 1 Pet Populations 2019-2024

MARKET DATA

Table 2 Sales of Pet Food by Category: Volume 2019-2024
Table 3 Sales of Pet Care by Category: Value 2019-2024
Table 4 Sales of Pet Food by Category: % Volume Growth 2019-2024
Table 5 Sales of Pet Care by Category: % Value Growth 2019-2024
Table 6 NBO Company Shares of Pet Food: % Value 2019-2023
Table 7 LBN Brand Shares of Pet Food: % Value 2020-2023
Table 8 NBO Company Shares of Dog and Cat Food: % Value 2019-2023
Table 9 LBN Brand Shares of Dog and Cat Food: % Value 2020-2023
Table 10 □ Penetration of Private Label in Pet Care by Category: % Value 2019-2024
Table 11 □ Distribution of Pet Care by Format: % Value 2019-2024
Table 12 □ Distribution of Pet Care by Format and Category: % Value 2024
Table 13 □ Distribution of Dog and Cat Food by Format: % Value 2019-2024
Table 14 □ Distribution of Dog and Cat Food by Format and Category: % Value 2024
Table 15 □ Forecast Sales of Pet Food by Category: Volume 2024-2029
Table 16 □ Forecast Sales of Pet Care by Category: Value 2024-2029
Table 17 □ Forecast Sales of Pet Food by Category: % Volume Growth 2024-2029
Table 18 □ Forecast Sales of Pet Care by Category: % Value Growth 2024-2029

DISCLAIMER

SOURCES

Summary 1 Research Sources

DOG FOOD IN INDONESIA

KEY DATA FINDINGS

2024 DEVELOPMENTS

Growth slows down, while demand remains stable
Central Proteinaprima retains its lead, thanks to competitive availability of Bolt brand
Pet shops and e-commerce maintain their strong distribution shares

PROSPECTS AND OPPORTUNITIES

Small positive sales expected to maintain due to baseline demand
A mix of wet and dry dog food and healthier variants expected
Average unit prices expected to decline, in line with an increase in products imported from China

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

CATEGORY INDICATORS

Table 19 Dog Owning Households: % Analysis 2019-2024

Table 20 Dog Population 2019-2024

Table 21 Consumption of Dog Food by Prepared vs Non-prepared: % Analysis 2019-2024

CATEGORY DATA

Summary 2 Dog Food by Price Band 2024

Table 22 Sales of Dog Food by Category: Volume 2019-2024

Table 23 Sales of Dog Food by Category: Value 2019-2024

Table 24 Sales of Dog Food by Category: % Volume Growth 2019-2024

Table 25 Sales of Dog Food by Category: % Value Growth 2019-2024

Table 26 Sales of Dry Dog Food by Life-Cycle: % Value 2019-2024

Table 27 Sales of Wet Dog Food by Life-Cycle: % Value 2019-2024

Table 28 □NBO Company Shares of Dog Food: % Value 2019-2023

Table 29 □LBN Brand Shares of Dog Food: % Value 2020-2023

Table 30 □LBN Brand Shares of Dog Treats and Mixers: % Value 2020-2023

Table 31 □Distribution of Dog Food by Format: % Value 2019-2024

Table 32 □Forecast Sales of Dog Food by Category: Volume 2024-2029

Table 33 □Forecast Sales of Dog Food by Category: Value 2024-2029

Table 34 □Forecast Sales of Dog Food by Category: % Volume Growth 2024-2029

Table 35 □Forecast Sales of Dog Food by Category: % Value Growth 2024-2029

CAT FOOD IN INDONESIA

KEY DATA FINDINGS

2024 DEVELOPMENTS

Cat food maintains healthy value and volume growth, thanks to high cat ownership

Central Proteinaprima maintains its lead with the ubiquitous Bolt brand

Increasing availability of re-packed formats across channels

PROSPECTS AND OPPORTUNITIES

Positive growth to continue thanks to popularity of cats

Dry cat food will remain popular, thanks to offering an affordable volume-to-price ratio

Polarisation between economy and premium products expected

CATEGORY INDICATORS

Table 36 Cat Owning Households: % Analysis 2019-2024

Table 37 Cat Population 2019-2024

Table 38 Consumption of Cat Food by Prepared vs Non-prepared: % Analysis 2019-2024

CATEGORY DATA

Summary 3 Cat Food by Price Band 2024

Table 39 Sales of Cat Food by Category: Volume 2019-2024

Table 40 Sales of Cat Food by Category: Value 2019-2024

Table 41 Sales of Cat Food by Category: % Volume Growth 2019-2024

Table 42 Sales of Cat Food by Category: % Value Growth 2019-2024

Table 43 Sales of Dry Cat Food by Life-Cycle: % Value 2019-2024

Table 44 Sales of Wet Cat Food by Life-Cycle: % Value 2019-2024

Table 45 □NBO Company Shares of Cat Food: % Value 2019-2023

Table 46 □LBN Brand Shares of Cat Food: % Value 2020-2023

Table 47 □LBN Brand Shares of Cat Treats and Mixers: % Value 2020-2023

Table 48 □Distribution of Cat Food by Format: % Value 2019-2024

Table 49 □Forecast Sales of Cat Food by Category: Volume 2024-2029

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

Table 50 □Forecast Sales of Cat Food by Category: Value 2024-2029

Table 51 □Forecast Sales of Cat Food by Category: % Volume Growth 2024-2029

Table 52 □Forecast Sales of Cat Food by Category: % Value Growth 2024-2029

OTHER PET FOOD IN INDONESIA

KEY DATA FINDINGS

2024 DEVELOPMENTS

Fish food continues to be a category driver, thanks to popularity of fish in Indonesia

Central Proteinaprima maintains its lead with its Takari brand

Bird food and small mammal/reptile food maintain sales, with trends dependent on pet popularity

PROSPECTS AND OPPORTUNITIES

Baseline demand will drive positive sales, while competition and opportunities may come from alternatives

Fish food will continue to be a strong driver of sales

Pet shops will remain key for other pet food

CATEGORY INDICATORS

Table 53 Other Pet Population 2019-2024

CATEGORY DATA

Table 54 Sales of Other Pet Food by Category: Volume 2019-2024

Table 55 Sales of Other Pet Food by Category: Value 2019-2024

Table 56 Sales of Other Pet Food by Category: % Volume Growth 2019-2024

Table 57 Sales of Other Pet Food by Category: % Value Growth 2019-2024

Table 58 LBN Brand Shares of Bird Food: % Value 2020-2023

Table 59 LBN Brand Shares of Fish Food: % Value 2020-2023

Table 60 LBN Brand Shares of Small Mammal/Reptile Food: % Value 2020-2023

Table 61 Distribution of Other Pet Food by Format: % Value 2019-2024

Table 62 □Forecast Sales of Other Pet Food by Category: Volume 2024-2029

Table 63 □Forecast Sales of Other Pet Food by Category: Value 2024-2029

Table 64 □Forecast Sales of Other Pet Food by Category: % Volume Growth 2024-2029

Table 65 □Forecast Sales of Other Pet Food by Category: % Value Growth 2024-2029

PET PRODUCTS IN INDONESIA

KEY DATA FINDINGS

2024 DEVELOPMENTS

Another positive growth but slowing down

Esprea maintains its lead in extremely fragmented category

Cat litter gains traction in usage among middle-income homes

PROSPECTS AND OPPORTUNITIES

Positive sales set to continue, with a balance between pampering products and affordability

Ongoing consumer awareness of pets' health and wellbeing will support overall sales

Increase in pet-friendly public locations to drive sales in pet beauty products

CATEGORY DATA

Table 66 Sales of Pet Products by Category: Value 2019-2024

Table 67 Sales of Pet Products by Category: % Value Growth 2019-2024

Table 68 Sales of Pet Healthcare by Type: % Value 2019-2024

Table 69 Sales of Other Pet Products by Type: % Value 2019-2024

Table 70 NBO Company Shares of Pet Products: % Value 2019-2023

Table 71 LBN Brand Shares of Pet Products: % Value 2020-2023

Table 72 Distribution of Pet Products by Format: % Value 2019-2024

Table 73 Forecast Sales of Pet Products by Category: Value 2024-2029

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

Table 74 Forecast Sales of Pet Products by Category: % Value Growth 2024-2029

Pet Care in Indonesia

Market Direction | 2024-04-30 | 50 pages | Euromonitor

To place an Order with Scotts International:

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

ORDER FORM:

Select license	License	Price
	Single User Licence	€1750.00
	Multiple User License (1 Site)	€3500.00
	Multiple User License (Global)	€5250.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-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="2026-02-19"/>
		Signature	<input type="text"/>

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com