

PETFOOD FORUM ASIA



Pet care: Trends & opportunities in Asia Pacific

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 Euromonitor
International

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Pet care industry performance?

- *Where is growth expected to come from?*

How are trends shaping the industry?

- *Push for premium*
- *Homing in on health*
- *Channel dynamics*

What's next?

- *2026 and beyond*

Q&A

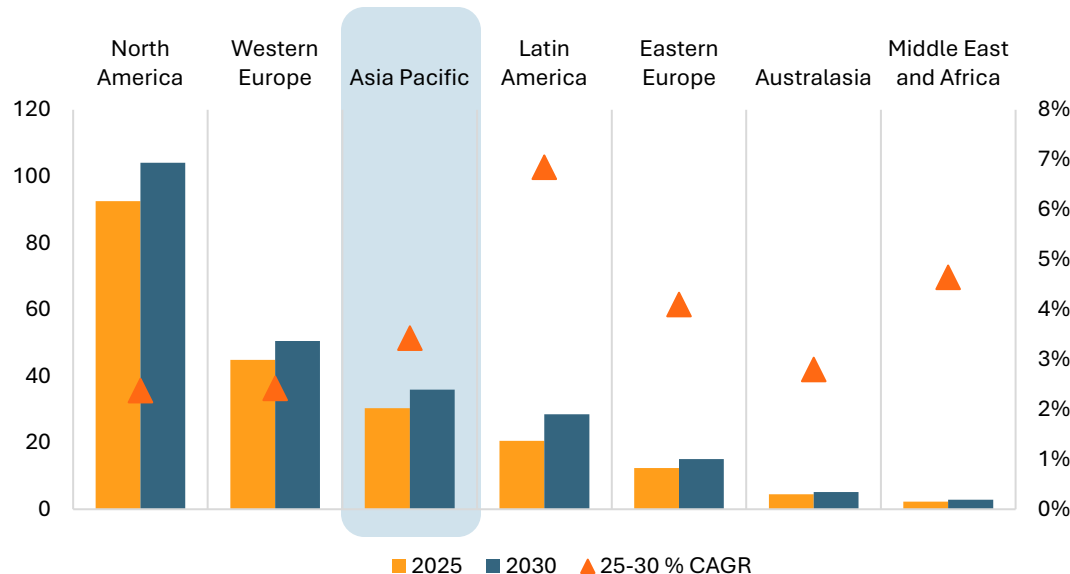


Pet care industry performance

Asia Pacific retains world no.3 spot

Pet Care Market Size by region

Unit: Retail values sales in USD Billion



1/3rd

Size of pet care in Asia Pacific vs North America, 2025

USD 30 billion

Pet care market size in Asia Pacific, 2025

3%

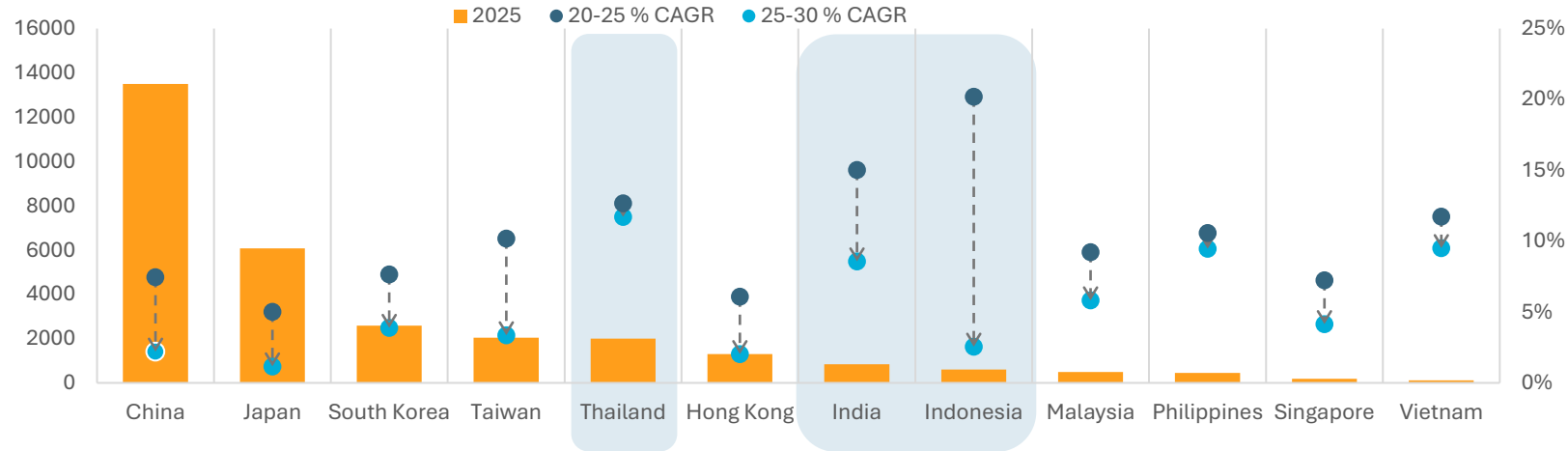
Forecasted CAGR from 2025 - 2030

Source: Euromonitor International Pet Care 2026ed

Thailand and India drive growth; China continues as the engine

Asia Pacific Pet Care Market Size, by country, 2025

Unit: Retail value sales, USD Million



China shapes region;
slows down growth pace



Thailand, India drive
growth; Indonesia sees
strongest slowdown.



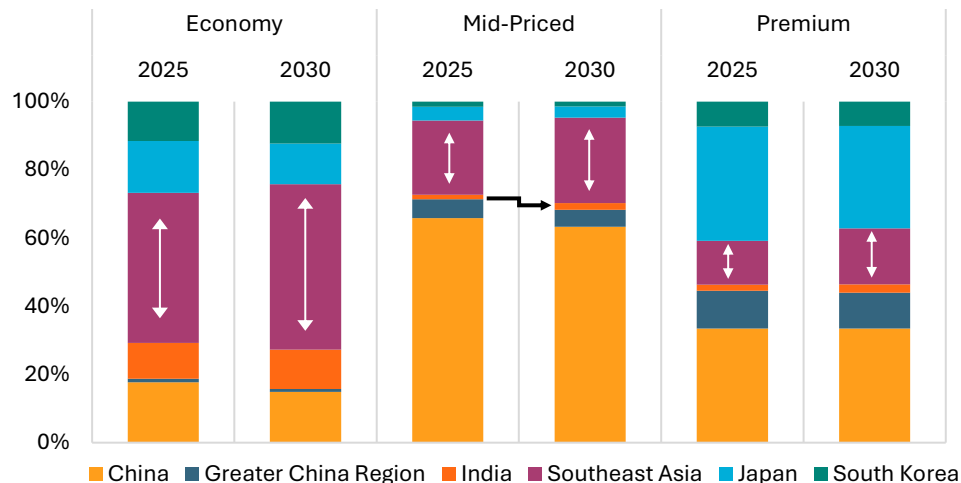
Despite a slowdown,
growth hotspots exist

Source: Euromonitor International Pet Care 2026ed

Shifting consumption patterns across price segments

Pet food consumption shift, by price segment, by region

Unit: volume in '000 tonnes



Pattern analysis



Absolute consumption of **mid-priced** to remain highest in **China**;
Forecasted growth fastest in **India**



Southeast Asia's contribution set to expand across all price segments;
economy and **premium** see highest change.



Japan **shrinks** across all price segments;
challenged by **declining** cat & dog
population. Premium relatively resilient.

Source: Euromonitor International Pet Care 2026ed

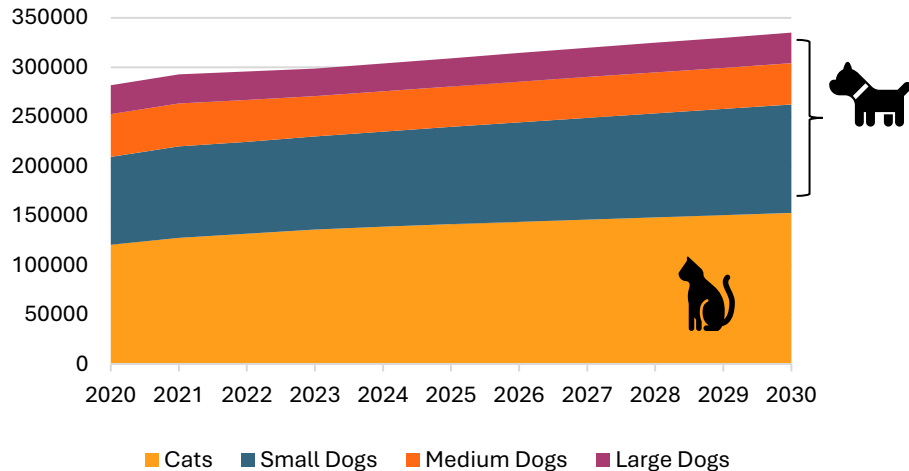
Category forecasts driven by evolving pet demographics

Felines claw their way up; large dogs bow down

Category growth mimics demographic shifts

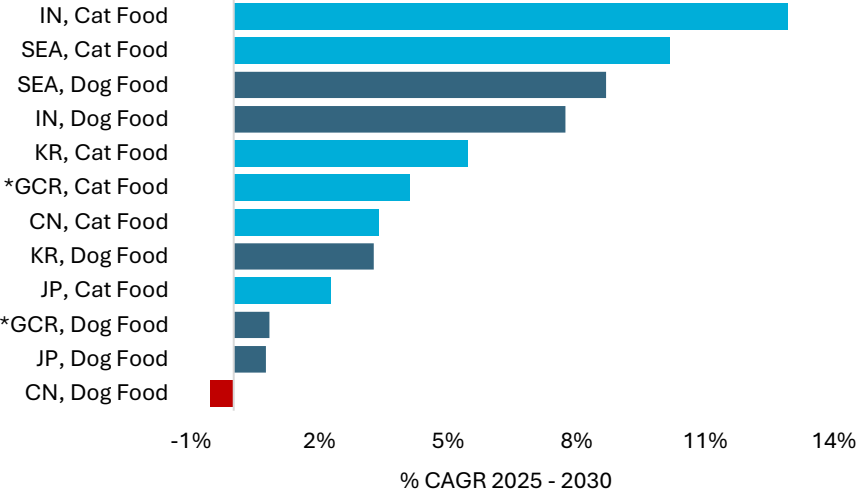
Pet population, Asia Pacific, 2020-2030

Unit: Thousand animals



Forecasted growth, cat vs dog food, by country

Unit: retail value sales in USD Million



Source: Euromonitor International Pet Care 2026ed; *GCR: Greater China Region

Small pets, big growth

- Stronger growth prospects for cat-oriented categories.
- Smaller dogs support consumption levels



Markets

- Emerging economies with low penetration levels offer growth through penetration and expansion



Price segments

- Evolving pet ownership sensibilities and stronger levels of pet humanization drive growth across price tiers.



How are trends shaping the industry?

Top five trends in Pet Care

The volume cliff:

Pricing push weighs heavy on volumes

Top Five Trends in Pet Care

Push for Premium:

Pet roles evolve, so do price tags

Homing in on Health:

The era of preventative pet health management

Channel Dynamics:

Pet specialists and digital platforms take the lead

AI integration:

Enabling personalised pet health management

Top five trends in Pet Care

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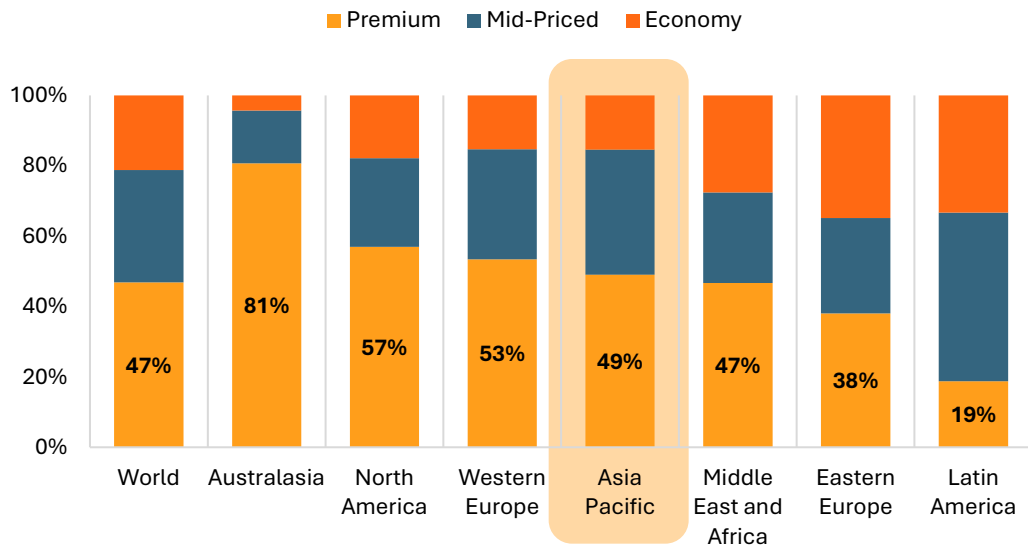
Push for Premium:

Pet roles evolve, so do
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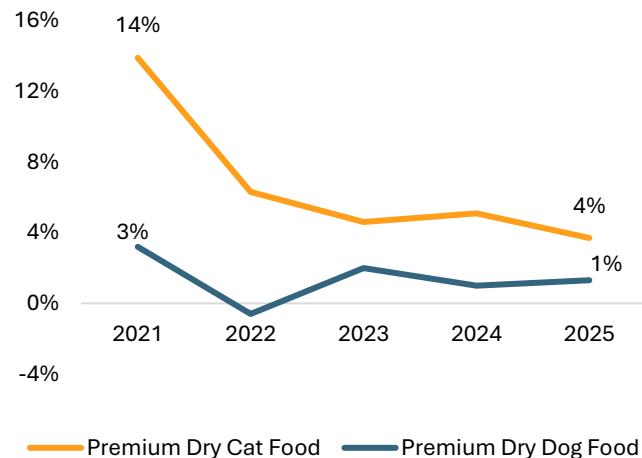


Slowing momentum in premium pet food: Rethinking strategy in a post-covid market

Dry Dog Food Value Share by Price Tier, 2025



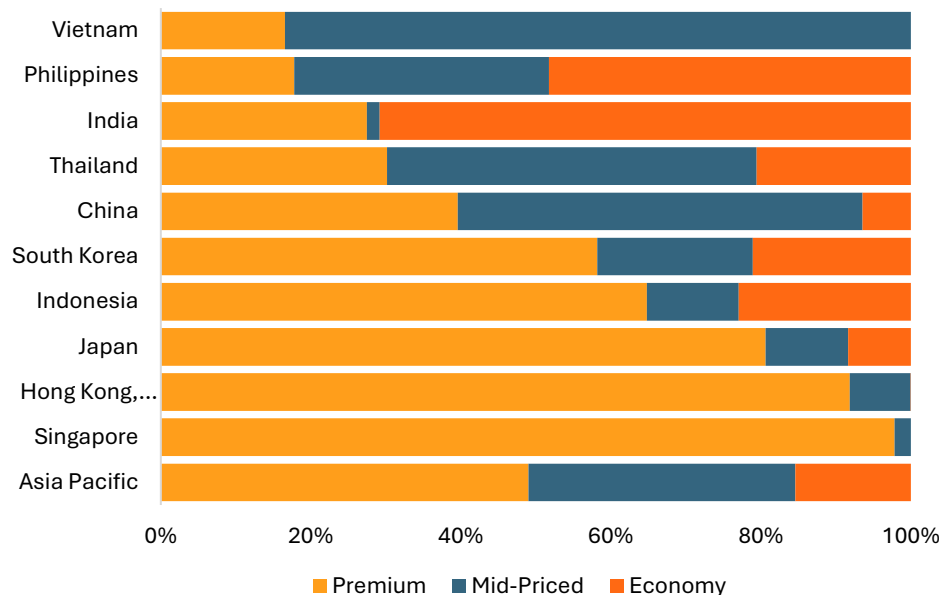
APAC Premium Dry Pet Food Annual Growth Rate, Volume



Source: Euromonitor International Pet Care 26ed

Premium tier leads, but share varies by country

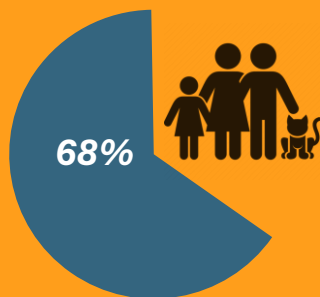
Dry Dog Food Value Share by Price Tier, 2025



- Share of premium tier varies widely across countries in Asia Pacific
- Singapore and Hong Kong rely heavily on **imported brands**, driving advanced premiumization.
- Mid-priced products are dominating in China and Thailand, reflecting practical and value-conscious spending.
- Japan's premium share remains high, but overall category is **shrinking**.

Source: Euromonitor International Pet Care 26ed

Premiumisation: A consumer perspective



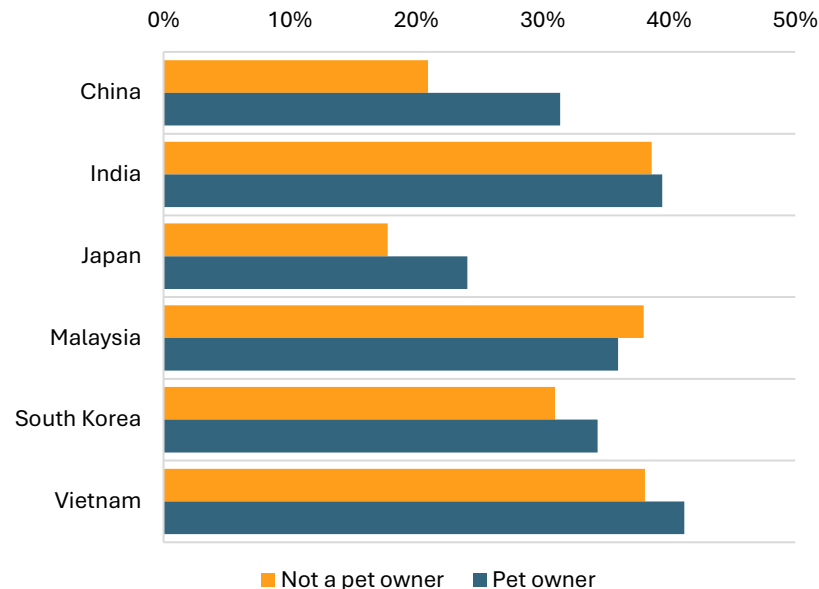
“Pets are considered beloved members of the family”
(% of online respondents in APAC)

*Source: Euromonitor Voice of the Consumer: Lifestyles Survey, fielded January to February 2025; N: 4763

*“I would rather buy **fewer but higher quality** things”*

Shopping preferences by pet owner, by country, 2025

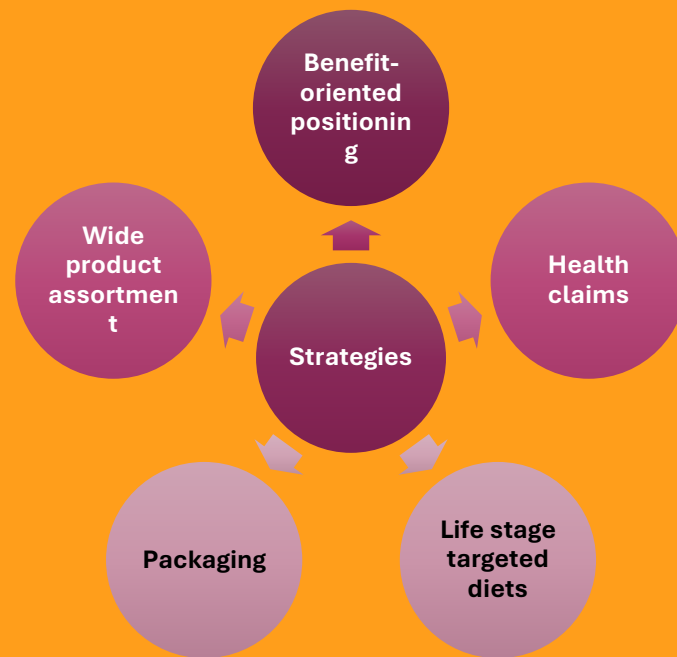
Unit: % online respondents; pet owners



*Source: Euromonitor Voice of the Consumer: Lifestyles Survey, fielded January to February 2025; N: 18140 total



Industry perspective: Premiumising the appeal



Premiumisation

A double-edged sword

- Offers better margins and profitability but limits a brand to a niche.
- Creates a ***demand gap***
- Rise of the “***affordable premium***” segment.

Brand response

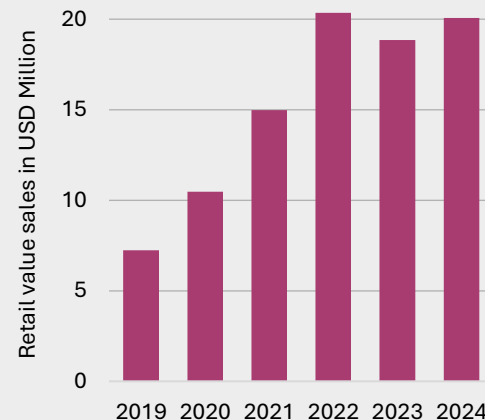
Affordable premium line launch



Image source: Ziwi Peak

Ziwi Peak

Sales in dog and cat food in South Korea



Source: Euromonitor International Pet Care 2026ed

Key considerations

- *Premiumisation is a key growth driver in pet care, fuelled by the humanization trend.*
- *A singular focus on this strategy risks pricing out the mass market. Without supporting volumes, premium segments risk stagnation.*
- *Brands need to establish clear pathways to a premium positioning. Innovations around pet health present clear routes.*



Homing in on Health:

The era of preventative pet health management



Understanding consumer focus on pet health

Leading global pet food claims

Unit: Total no. of online SKUs

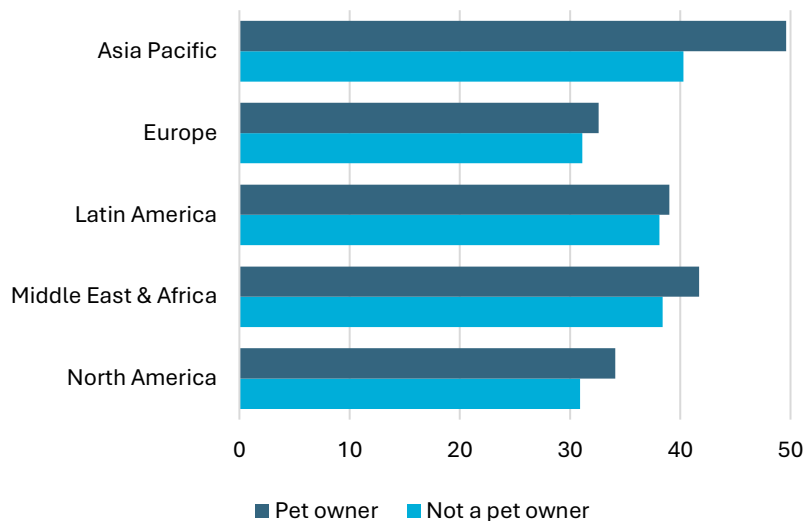


Source: Euromonitor International Innovation tool

"I look for health & nutritional properties when buying (human) food"

Influential product features in food, by region; 2025

Unit: % of online respondents



Source: Euromonitor International Voice of Consumer; Lifestyle Survey fielded January to February 2025; N = 40337

Functionality spans across pet consumables & price tiers

Cat Food



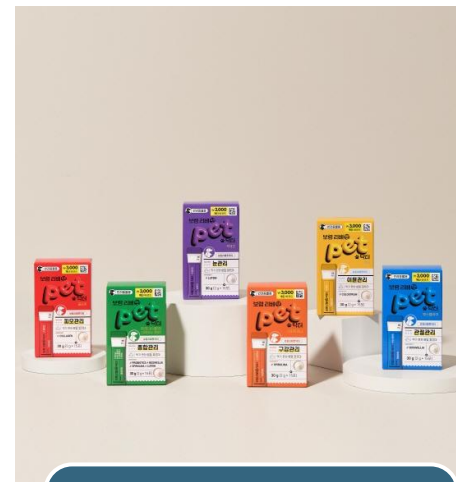
Therafeed, South Korea:
Economy dry cat food,
hairball control claim

Cat Treats



Ciao Churu, Japan:
Premium cat treats
targeting **skin & coat**

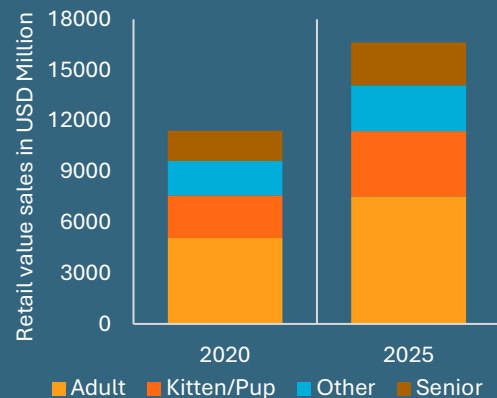
Pet dietary supplements



Boryung Livepet Doctor, South Korea: 6
variants of supplements

Are **life-stage targeted** diets the next wave?

Pet food split by life stage,
Asia Pacific, 2020/2025



Juveniles gain favor as product launches target their needs



Source: Euromonitor International Pet Care 26ed

Image source: Moochie.com, Moochie facebook, www.petfoodprocessing.net

Seniors in the spotlight

- China: **MyFoodie** launches Barf series
- Designed for **senior dogs**
- Characterized by **TCM** medicines such as **yam** and **Indian buead tuckahoe**



Image source: myfoodiepet.com

BARF霸弗® 丛林食谱
「益肠」「养胃」只是起点

益肠草本组方
实力养胃益肠



Key Takeaway

- *Rising pet health awareness drives demand for health-oriented benefits across categories.*
- *Health claims appearing across price tiers.*
- *Need to differentiate through more personalized solutions.*



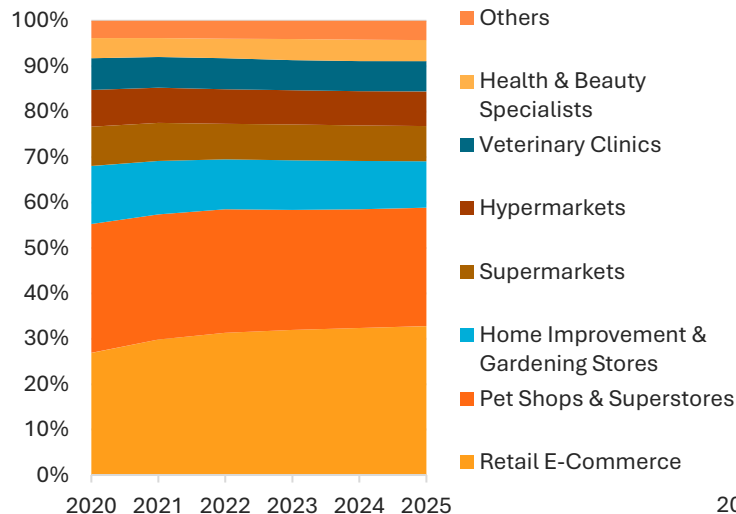
Channel Dynamics:

Pet specialists and digital platforms take the lead

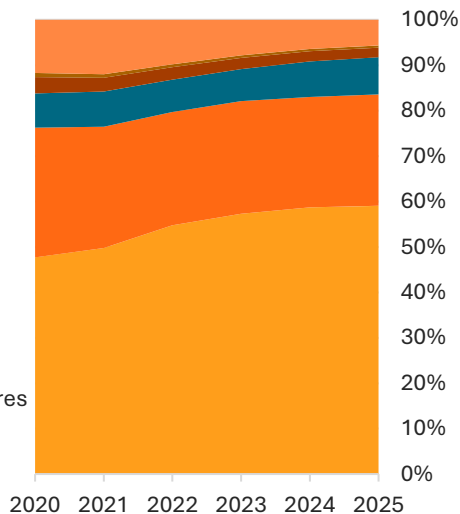


Pet specialists and digital platforms take the lead

Pet care retail distribution, **APAC excl. China**, 2020-2025



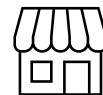
Pet care retail distribution, **China**, 2020-2025



E-commerce dominates;
Grows at **12% CAGR** from
2020-2025 across both **China**
and **Rest of APAC**



Pet specialists marginally
shrink in distribution share;
remain most **popular offline**
channel.

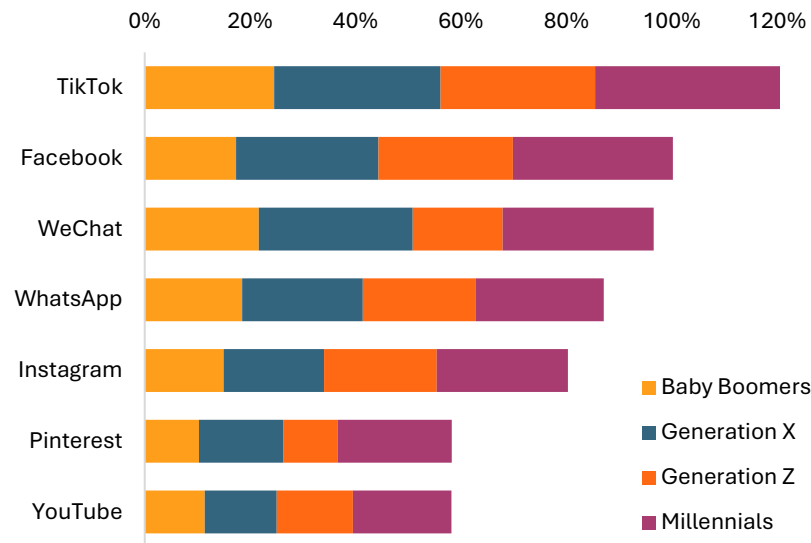


Supermarkets and
hypermarkets continue to
shrink

Source: Euromonitor International Pet Care 2026ed

The marketplace shakeup

Social media shopping activities, APAC by generation, 2024



Source: Euromonitor Voice of the Consumer: Digital Survey, fielded March to April 2025; n=3774

Q. Which of the following shopping-related activities have you done in the past month on the following social media platforms? - Buy goods or services on social media platform.

Traditional e-commerce is being challenged by social & quick-commerce

Retailers, annual sales

| | 2022 | 2023 | 2024 | 2025 |
|-----------------------|---------|---------|---------|-------|
| JD Direct Sales | 1,938.5 | 2,282.1 | 3,027.9 | 971.4 |
| Douyin Marketplace .. | 477.3 | 1,137.5 | 1,242.8 | 433.0 |
| Tmall Marketplace .. | 762.0 | 780.2 | 1,691.4 | 353.8 |
| Tmall Direct Sales | 502.7 | 696.6 | 981.4 | 230.3 |
| JD Marketplace .. | 788.3 | 1,211.6 | 854.8 | 205.2 |

Source: Euromonitor International E-commerce; Pet Care sales in China

Brand outreach & engagement



Fostering a sense of community

伯纳天纯®
Pure Natural



Delivering speed & convenience



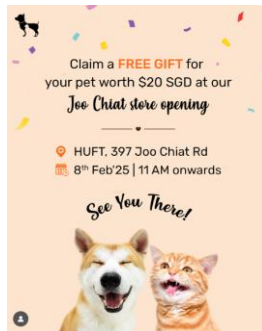
Images sources: jingdaily.com; crunchbase.com; kathrynread.com; linkedin.com

Pet specialists: From kibble-by-the-gram to pet pampering services

Modern pet speciality retailers continue expanding in the region



Pet Lover's Centre,
Pavillion Bukit Jalil,
MY, March 2024



Heads Up For Tails, Joo Chiat,
SG, 2024.



Pet All My Love
x
Bangchak Group

Traditional pet shops offer more than just value



Repacked kibble from leading brands available online in Philippines, Indonesia and Malaysia.

Images sources: retailer's instagram account, rs.co.th

Images sources: merpstore.com;
youbeli.com, blibli.com

Zoomore by Welcia



Pet World Amigo by Alleanza Holdings



Key Takeaway

- *Moving from a transactional relation to a more engaging relation one.*
- *Pet specialty channels continue to remain crucial in the offline space.*
- *Retailers diversifying beyond their core and into pet care*



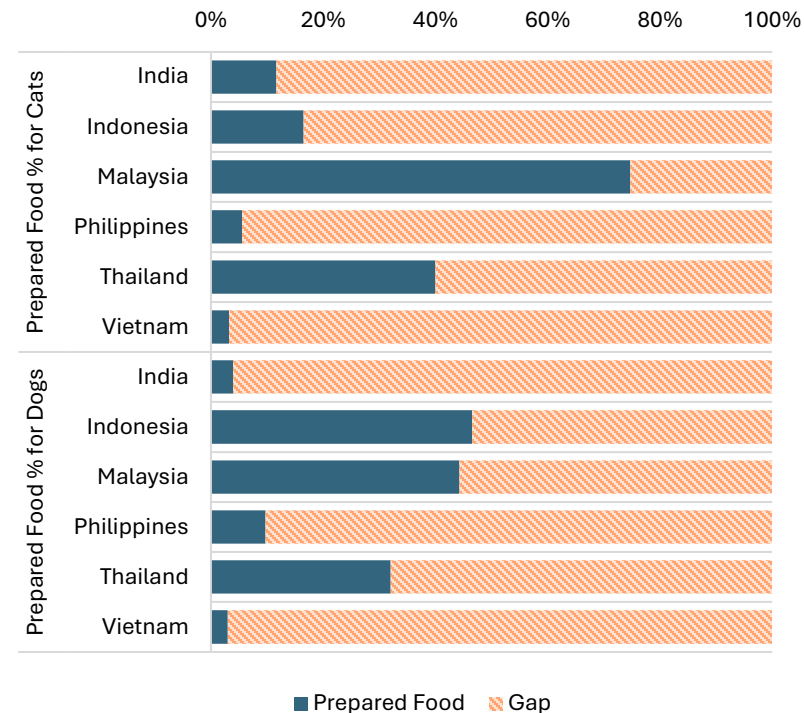
What lies ahead?

The next big bowl

- Southeast Asia and India: Emerging economies bring opportunities of gaining market depth

Penetration level of packaged pet food feeding, India & SEA, 2025

Unit: % pet cats/dogs



Source: Euromonitor International Pet Care 2026ed

Tariffs accelerate on going movements in Pet Care



**Asian brands to
the world**



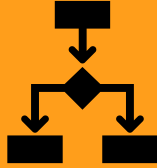
**Rising consumer
preference for
local**



**Shifting
competitive
landscape**



**Exploring new
frontiers**



Strengthen scenario planning



Future-proof the supply chain



Stay consumer-centric



Optimise pricing & portfolio strategy

Q&A



Thank you!



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