



Pet Care in Japan

April 2024

Table of Contents

Pet Care in Japan

EXECUTIVE SUMMARY

Pet care in 2024: The big picture

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

Cat Food in Japan

KEY DATA FINDINGS

2024 DEVELOPMENTS

Price increases lead to positive value growth of cat food

Functional cat food is popular option among pet owners

Drugstores and e-commerce continue to gain share of distribution

PROSPECTS AND OPPORTUNITIES

Rise in cat population to support demand for dry cat food and cat treats

Increasing price of imports gives advantages to domestic brands

Cat treats and mixers to diversify and expand

CATEGORY INDICATORS

Table 19 - Cat Owning Households: % Analysis 2019-2024

Table 20 - Cat Population 2019-2024

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

CATEGORY DATA

Summary 2 - Cat Food by Price Band 2024

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Dog Food in Japan

KEY DATA FINDINGS

2024 DEVELOPMENTS

Functional dog food leads growth

Increasing availability of wet snacks impacts demand for wet dog food

E-commerce remains leading distribution channel for dog food

PROSPECTS AND OPPORTUNITIES

Decrease in number of dogs is inevitable, but premiumisation will continue

Increasing price of imported items benefits domestic brands

Humanisation of dog food

CATEGORY INDICATORS

Table 36 - Dog Owning Households: % Analysis 2019-2024

Table 37 - Dog Population 2019-2024

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

CATEGORY DATA

Summary 3 - Dog Food by Price Band 2024

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Other Pet Food in Japan

KEY DATA FINDINGS

2024 DEVELOPMENTS

While killifish enjoy a boom, large-sized fish such as carp are in decline
Small mammal/reptile food remains the largest value category of other pet food

PROSPECTS AND OPPORTUNITIES

Maturity of other pet population set to slow volume sales growth
Concepts popular in dog and cat food emerging in 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 Japan

KEY DATA FINDINGS

2024 DEVELOPMENTS

Hygiene products continue to drive sales growth
Unicharm launches innovative pet sheet for dogs

PROSPECTS AND OPPORTUNITIES

Pet tech and Chinese products expand mainly online
Major players from human packaged food join pet dietary supplements

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

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/pet-care-in-japan/report.