



Passport

Pet Care in Thailand

Euromonitor International
May 2022

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PET CARE IN THAILAND - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

Pet care in 2022: The big picture

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2022 key trends

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Competitive landscape

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Retailing developments

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What next for pet care?

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MARKET INDICATORS

Table 1 Pet Populations 2017-2022

'000s of animals	2017	2018	2019	2020	2021	2022
Bird Population	Data removed from sample					
Cat Population						
Dog Population						
Fish Population						
Reptile Population						
Small Mammal Population						
Pet Population						

Source: Euromonitor International from official statistics

MARKET DATA

Table 2 Sales of Pet Food by Category: Volume 2017-2022

Tonnes	2017	2018	2019	2020	2021	2022
Dog and Cat Food	Data removed from sample					
Other Pet Food						
Pet Food						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 3 Sales of Pet Care by Category: Value 2017-2022

THB million	2017	2018	2019	2020	2021	2022
Dog and Cat Food	Data removed from sample					
Other Pet Food						
Pet Food						
Cat Litter						
Pet Healthcare						
Other Pet Products						

Pet Products

Pet Care

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 4 Sales of Pet Food by Category: % Volume Growth 2017-2022

% volume growth

2021/22 2017-22 CAGR 2017/22 Total

Dog and Cat Food
Other Pet Food
Pet Food

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 5 Sales of Pet Care by Category: % Value Growth 2017-2022

% current value growth

2021/22 2017-22 CAGR 2017/22 Total

Dog and Cat Food
Other Pet Food
Pet Food
Cat Litter
Pet Healthcare
Pet Products
Pet Care

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 6 NBO Company Shares of Pet Food: % Value 2017-2021

% retail value rsp

Company 2017 2018 2019 2020 2021

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 7 LBN Brand Shares of Pet Food: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 8 NBO Company Shares of Dog and Cat Food: % Value 2017-2021

% retail value rsp Company	2017	2018	2019	2020	2021
-------------------------------	------	------	------	------	------

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 9 LBN Brand Shares of Dog and Cat Food: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 10 Penetration of Private Label in Pet Care by Category: % Value 2017-2022

% retail value rsp	2017	2018	2019	2020	2021	2022
--------------------	------	------	------	------	------	------

Pet Care
Pet Food

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 11 Distribution of Pet Care by Format: % Value 2017-2022

% retail value rsp

2017

2018

2019

2020

2021

2022

Store-Based Retailing

- Grocery Retailers
- Modern Grocery Retailers
- Convenience Stores
- Discounters
- Forecourt Retailers
- Hypermarkets
- Supermarkets
- Traditional Grocery Retailers
- Mixed Retailers
- Department Stores
- Mass Merchandisers
- Variety Stores
- Warehouse Clubs
- Non-Grocery Specialists
- Pet superstores
- Pet shops
- Health and Beauty Specialist Retailers
- Beauty Specialist Retailers
- Chemists/Pharmacies
- Drugstores/parapharmacies
- Other Health and Beauty Retailers
- Home and Garden Specialist Retailers
- Home Improvement and Gardening Stores
- Homewares and Home Furnishing Stores
- Other Non-Grocery Specialists

Non-Store Retailing

- Direct Selling
- Homeshopping
- E-Commerce

Non-retail channels

- Veterinary clinics

Total

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 12 Distribution of Pet Care by Format and Category: % Value 2022

% retail value rsp

Pet Food

Pet Products

Store-Based Retailing

- Grocery Retailers
- Modern Grocery Retailers
- Convenience Stores
- Discounters
- Forecourt Retailers

Data removed from sample

--- Hypermarkets
 --- Supermarkets
 -- Traditional Grocery Retailers
 - Mixed Retailers
 -- Department Stores
 -- Mass Merchandisers
 -- Variety Stores
 -- Warehouse Clubs
 - Non-Grocery Specialists
 -- Pet superstores
 -- Pet shops
 -- Health and Beauty Specialist Retailers
 --- Beauty Specialist Retailers
 --- Chemists/Pharmacies
 --- Drugstores/parapharmacies
 --- Other Health and Beauty Retailers
 -- Home and Garden Specialist Retailers
 --- Home Improvement and Gardening Stores
 --- Homewares and Home Furnishing Stores
 -- Other Non-Grocery Specialists
 Non-Store Retailing
 Direct Selling
 - Homeshopping
 - E-Commerce
 Non-retail channels
 - Veterinary clinics
 Total

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Key: PF = pet food; PP = pet products

Data removed from sample

Table 13 Distribution of Dog and Cat Food by Format: % Value 2017-2022

% retail value rsp

2017 2018 2019 2020 2021 2022

Store-Based Retailing
 - Grocery Retailers
 -- Modern Grocery Retailers
 --- Convenience Stores
 --- Discounters
 --- Forecourt Retailers
 --- Hypermarkets
 --- Supermarkets
 -- Traditional Grocery Retailers
 - Mixed Retailers
 -- Department Stores
 -- Mass Merchandisers
 -- Variety Stores
 -- Warehouse Clubs
 - Non-Grocery Specialists
 -- Pet superstores
 -- Pet shops
 -- Health and Beauty Specialist Retailers
 --- Beauty Specialist Retailers

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- Chemists/Pharmacies
- Drugstores/
parapharmacies
- Other Health and
Beauty Retailers
- Home and Garden
Specialist Retailers
- Home Improvement
and Gardening Stores
- Homewares and Home
Furnishing Stores
- Other Non-Grocery
Specialists
- Non-Store Retailing
- Direct Selling
- Homeshopping
- E-Commerce
- Non-retail channels
- Veterinary clinics
- Total

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 14 **Distribution of Dog and Cat Food by Format and Category: % Value 2022**

% retail value rsp

Cat Food

Dog Food

- Store-Based Retailing
- Grocery Retailers
- Modern Grocery Retailers
- Convenience Stores
- Discounters
- Forecourt Retailers
- Hypermarkets
- Supermarkets
- Traditional Grocery Retailers
- Mixed Retailers
- Department Stores
- Mass Merchandisers
- Variety Stores
- Warehouse Clubs
- Non-Grocery Specialists
- Pet superstores
- Pet shops
- Health and Beauty Specialist Retailers
- Beauty Specialist Retailers
- Chemists/Pharmacies
- Drugstores/parapharmacies
- Other Health and Beauty Retailers
- Home and Garden Specialist Retailers
- Home Improvement and Gardening Stores
- Homewares and Home Furnishing Stores
- Other Non-Grocery Specialists
- Non-Store Retailing
- Direct Selling
- Homeshopping
- E-Commerce
- Non-retail channels
- Veterinary clinics

Data removed from sample

Total

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Key: CF = cat food; DF = dog food

Table 15 Forecast Sales of Pet Food by Category: Volume 2022-2027

Tonnes	2022	2023	2024	2025	2026	2027
Dog and Cat Food	Data removed from sample					
Other Pet Food						
Pet Food						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 16 Forecast Sales of Pet Care by Category: Value 2022-2027

THB million	2022	2023	2024	2025	2026	2027
Dog and Cat Food	Data removed from sample					
Other Pet Food						
Pet Food						
Cat Litter						
Pet Healthcare						
Other Pet Products						
Pet Products						
Pet Care						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 17 Forecast Sales of Pet Food by Category: % Volume Growth 2022-2027

% volume growth	2022/23	2022-27 CAGR	2022/27 Total
Dog and Cat Food	Data removed from sample		
Other Pet Food			
Pet Food			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 18 Forecast Sales of Pet Care by Category: % Value Growth 2022-2027

% constant value growth	2022/2023	2022-27 CAGR	2022/27 Total
Dog and Cat Food	Data removed from sample		
Other Pet Food			
Pet Food			
Cat Litter			
Pet Healthcare			
Other Pet Products			
Pet Products			
Pet Care			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

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SOURCES

Sources used during research include the following:

Summary 1 Research Sources

Official Sources

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Trade Associations

Trade Press

Source: Euromonitor International

CAT FOOD IN THAILAND - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2022 DEVELOPMENTS

Rising cat population and changes in feeding drive growth

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Demand for complete appropriate nutrition supports sales of premium cat food

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Mars maintains its lead, but could face A challenge from premium players

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PROSPECTS AND OPPORTUNITIES

New launches likely to focus on health

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Health trend dictates innovation in cat treats

Content removed from sample

Small brands lead innovation in wet cat food

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CATEGORY INDICATORS

Table 19 Cat Owing Households: % Analysis 2017-2022

	2017	2018	2019	2020	2021	2022
% Households owning a cat (% households)	Data removed from sample					
Households owning a cat ('000 Households)						

Source: Euromonitor International from official statistics

Table 20 Cat Population 2017-2022

'000s of animals	2017	2018	2019	2020	2021	2022
Cat Population	Data removed from sample					

Source: Euromonitor International from official statistics

Table 21 Consumption of Cat Food by Prepared vs Non-prepared: % Analysis 2017-2022

% total consumption	2017	2018	2019	2020	2021	2022
Prepared cat food	Data removed from sample					
Non-prepared cat food						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

CATEGORY DATA

Summary 2 Cat Food by Price Band 2022

Category	Price range per kg	THB	Brand examples
Wet cat food			



Source: Euromonitor International

Table 22 Sales of Cat Food by Category: Volume 2017-2022

Tonnes	2017	2018	2019	2020	2021	2022
-- Cat Treats and Mixers	Data removed from sample					
-- Dry Cat Food						
--- Economy Dry Cat Food						
--- Mid-Priced Dry Cat Food						
--- Premium Dry Cat Food						
-- Wet Cat Food						
--- Economy Wet Cat Food						
--- Mid-Priced Wet Cat Food						
--- Premium Wet Cat Food						
- Cat Food						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 23 Sales of Cat Food by Category: Value 2017-2022

THB million	2017	2018	2019	2020	2021	2022
-- Cat Treats and Mixers	Data removed from sample					
-- Dry Cat Food						
--- Economy Dry Cat Food						
--- Mid-Priced Dry Cat Food						
--- Premium Dry Cat Food						
-- Wet Cat Food						
--- Economy Wet Cat Food						
--- Mid-Priced Wet Cat Food						
- Cat Food						

--- Premium Wet Cat Food
- Cat Food

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 24 Sales of Cat Food by Category: % Volume Growth 2017-2022

% volume growth	2021/22	2017-22 CAGR	2017/22 Total
-----------------	---------	--------------	---------------

-- Cat Treats and Mixers
-- Dry Cat Food
--- Economy Dry Cat Food
--- Mid-Priced Dry Cat Food
--- Premium Dry Cat Food
-- Wet Cat Food
--- Economy Wet Cat Food
--- Mid-Priced Wet Cat Food
--- Premium Wet Cat Food
- Cat Food

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 25 Sales of Cat Food by Category: % Value Growth 2017-2022

% current value growth	2021/22	2017-22 CAGR	2017/22 Total
------------------------	---------	--------------	---------------

-- Cat Treats and Mixers
-- Dry Cat Food
--- Economy Dry Cat Food
--- Mid-Priced Dry Cat Food
--- Premium Dry Cat Food
-- Wet Cat Food
--- Economy Wet Cat Food
--- Mid-Priced Wet Cat Food
--- Premium Wet Cat Food
- Cat Food

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 26 Sales of Dry Cat Food by Life-Cycle: % Value 2017-2022

% retail value rsp	2017	2018	2019	2020	2021	2022
--------------------	------	------	------	------	------	------

Kitten/Pup
Adult
Senior
Other
Total

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 27 Sales of Wet Cat Food by Life-Cycle: % Value 2017-2022

% retail value rsp	2017	2018	2019	2020	2021	2022
--------------------	------	------	------	------	------	------

Kitten/Pup
Adult
Senior
Other
Total

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 28 NBO Company Shares of Cat Food: % Value 2017-2021

% retail value rsp Company	2017	2018	2019	2020	2021
-------------------------------	------	------	------	------	------

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 29 LBN Brand Shares of Cat Food: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
-----------------------------------	---------------	------	------	------	------

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 30 LBN Brand Shares of Cat Treats and Mixers: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
-----------------------------------	---------------	------	------	------	------

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 31 Distribution of Cat Food by Format: % Value 2017-2022

% retail value rsp	2017	2018	2019	2020	2021	2022
--------------------	------	------	------	------	------	------

Store-Based Retailing

- Grocery Retailers
 - Modern Grocery Retailers
 - Convenience Stores
 - Discounters
 - Forecourt Retailers
 - Hypermarkets
 - Supermarkets
 - Traditional Grocery Retailers
- Mixed Retailers
 - Department Stores
 - Mass Merchandisers
 - Variety Stores
 - Warehouse Clubs
- Non-Grocery Specialists
 - Pet superstores
 - Pet shops
 - Health and Beauty Specialist Retailers
 - Beauty Specialist Retailers
 - Chemists/Pharmacies
 - Drugstores/parapharmacies
 - Other Health and Beauty Retailers
 - Home and Garden Specialist Retailers
 - Home Improvement and Gardening Stores
 - Homewares and Home Furnishing Stores
 - Other Non-Grocery Specialists

Non-Store Retailing

Data removed from sample

- Direct Selling
- Homeshopping
- E-Commerce
- Non-retail channels
- Veterinary clinics

Total

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

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Table 32 Forecast Sales of Cat Food by Category: Volume 2022-2027

Tonnes

2022 2023 2024 2025 2026 2027

- Cat Treats and Mixers
- Dry Cat Food
- Economy Dry Cat Food
- Mid-Priced Dry Cat Food
- Premium Dry Cat Food
- Wet Cat Food
- Economy Wet Cat Food
- Mid-Priced Wet Cat Food
- Premium Wet Cat Food
- Cat Food

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 33 Forecast Sales of Cat Food by Category: Value 2022-2027

THB million

2022 2023 2024 2025 2026 2027

- Cat Treats and Mixers
- Dry Cat Food
- Economy Dry Cat Food
- Mid-Priced Dry Cat Food
- Premium Dry Cat Food
- Wet Cat Food
- Economy Wet Cat Food
- Mid-Priced Wet Cat Food
- Premium Wet Cat Food
- Cat Food

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 34 Forecast Sales of Cat Food by Category: % Volume Growth 2022-2027

% volume growth

2022/23 2022-27 CAGR 2022/27 Total

- Cat Treats and Mixers
- Dry Cat Food
- Economy Dry Cat Food

- Mid-Priced Dry Cat Food
- Premium Dry Cat Food
- Wet Cat Food
- Economy Wet Cat Food
- Mid-Priced Wet Cat Food
- Premium Wet Cat Food
- Cat Food

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Data removed from sample

Table 35 Forecast Sales of Cat Food by Category: % Value Growth 2022-2027

% constant value growth

2022/2023 2022-27 CAGR 2022/27 Total

- Cat Treats and Mixers
- Dry Cat Food
- Economy Dry Cat Food
- Mid-Priced Dry Cat Food
- Premium Dry Cat Food
- Wet Cat Food
- Economy Wet Cat Food
- Mid-Priced Wet Cat Food
- Premium Wet Cat Food
- Cat Food

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

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DOG FOOD IN THAILAND - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2022 DEVELOPMENTS

Rising dog population benefits dog food

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Pet humanisation trend boosts sales of premium wet and dry dog food

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Pet expos give all dog food players more exposure

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PROSPECTS AND OPPORTUNITIES

Rising dog population will continue to drive growth

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Global companies to remain the clear leaders

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Local players in dog food see the highest innovation

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CATEGORY INDICATORS

Table 36 Dog Owning Households: % Analysis 2017-2022

	2017	2018	2019	2020	2021	2022
% Households owning a dog (% households)	Data removed from sample					
Households owning a dog ('000 Households)						

Source: Euromonitor International from official statistics

Table 37 Dog Population 2017-2022

'000s of animals

	2017	2018	2019	2020	2021	2022
Small Dog Popn (up to 20 lbs or 9 kg)	Data removed from sample					
Medium Dog Popn (20 to 50 lbs or 9 to 23 kg)						
Large Dog Popn (Over 50 lbs or over 23 kg)						

Dog Population

Source: Euromonitor International from official statistics

Table 38 Consumption of Dog Food by Prepared vs Non-prepared: % Analysis
2017-2022

% total consumption

	2017	2018	2019	2020	2021	2022
Prepared dog food	Data removed from sample					
Non-prepared dog food						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

CATEGORY DATA

Summary 3 Dog Food by Price Band 2022

Category	Price range per kg	THB	Brand examples
Wet dog food	Premium	Data removed from sample	
	Mid-priced		
	Economy		
Dry dog food	Premium		
	Mid-priced		
	Economy		

Source: Euromonitor International

Table 39 Sales of Dog Food by Category: Volume 2017-2022

Tonnes	2017	2018	2019	2020	2021	2022
-- Dog Treats and Mixers	Data removed from sample					
-- Dry Dog Food						
--- Economy Dry Dog Food						
Food						
--- Premium Dry Dog Food						
-- Wet Dog Food						
--- Economy Wet Dog Food						
--- Mid-Priced Wet Dog						

Food
 --- Premium Wet Dog Food
 - Dog Food
 Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 40 Sales of Dog Food by Category: Value 2017-2022

THB million

	2017	2018	2019	2020	2021	2022
-- Dog Treats and Mixers	Data removed from sample					
-- Dry Dog Food						
--- Economy Dry Dog Food						
--- Mid-Priced Dry Dog Food						
--- Premium Dry Dog Food						
-- Wet Dog Food						
--- Economy Wet Dog Food						
--- Mid-Priced Wet Dog Food						
--- Premium Wet Dog Food						
- Dog Food						
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources						

Table 41 Sales of Dog Food by Category: % Volume Growth 2017-2022

% volume growth

	2021/22	2017-22 CAGR	2017/22 Total
-- Dog Treats and Mixers	Data removed from sample		
-- Dry Dog Food			
--- Economy Dry Dog Food			
--- Mid-Priced Dry Dog Food			
--- Premium Dry Dog Food			
-- Wet Dog Food			
--- Economy Wet Dog Food			
--- Mid-Priced Wet Dog Food			
--- Premium Wet Dog Food			
- Dog Food			
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources			

Table 42 Sales of Dog Food by Category: % Value Growth 2017-2022

% current value growth

	2021/22	2017-22 CAGR	2017/22 Total
-- Dog Treats and Mixers	Data removed from sample		
-- Dry Dog Food			
--- Economy Dry Dog Food			
--- Mid-Priced Dry Dog Food			
--- Premium Dry Dog Food			
-- Wet Dog Food			
--- Economy Wet Dog Food			
--- Mid-Priced Wet Dog Food			

--- Premium Wet Dog Food
- Dog Food

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 43 Sales of Dry Dog Food by Life-Cycle: % Value 2017-2022

% retail value rsp	2017	2018	2019	2020	2021	2022
Kitten/Pup	Data removed from sample					
Adult						
Senior						
Other						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 44 Sales of Wet Dog Food by Life-Cycle: % Value 2017-2022

% retail value rsp	2017	2018	2019	2020	2021	2022
Kitten/Pup	Data removed from sample					
Adult						
Senior						
Other						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 45 NBO Company Shares of Dog Food: % Value 2017-2021

% retail value rsp	2017	2018	2019	2020	2021
Company					

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 46 LBN Brand Shares of Dog Food: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 47 LBN Brand Shares of Dog Treats and Mixers: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 48 Distribution of Dog Food by Format: % Value 2017-2022

% retail value rsp	2017	2018	2019	2020	2021	2022
--------------------	------	------	------	------	------	------

Store-Based Retailing

- Grocery Retailers
 - Modern Grocery Retailers
 - Convenience Stores
 - Discounters
 - Forecourt Retailers
 - Hypermarkets
 - Supermarkets
 - Traditional Grocery Retailers
- Mixed Retailers
 - Department Stores
 - Mass Merchandisers
 - Variety Stores
 - Warehouse Clubs
- Non-Grocery Specialists
 - Pet superstores
 - Pet shops
 - Health and Beauty Specialist Retailers
 - Beauty Specialist Retailers
 - Chemists/Pharmacies
 - Drugstores/parapharmacies
 - Other Health and Beauty Retailers
 - Home and Garden Specialist Retailers
 - Home Improvement and Gardening Stores
 - Homewares and Home Furnishing Stores
 - Other Non-Grocery Specialists

Non-Store Retailing

- Direct Selling
- Homeshopping
- E-Commerce

Non-retail channel

- Veterinary clinics

Total

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 49 Forecast Sales of Dog Food by Category: Volume 2022-2027

Tonnes	2022	2023	2024	2025	2026	2027
-- Dog Treats and Mixers						
-- Dry Dog Food						
--- Economy Dry Dog Food						
--- Mid-Priced Dry Dog Food						
--- Premium Dry Dog Food						
-- Wet Dog Food						
--- Economy Wet Dog Food						

Data removed from sample

--- Mid-Priced Wet Dog Food

--- Premium Wet Dog Food

- Dog Food

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 50 Forecast Sales of Dog Food by Category: Value 2022-2027

THB million

	2022	2023	2024	2025	2026	2027
-- Dog Treats and Mixers	Data removed from sample					
-- Dry Dog Food						
--- Economy Dry Dog Food						
--- Mid-Priced Dry Dog Food						
--- Premium Dry Dog Food						
-- Wet Dog Food						
--- Economy Wet Dog Food						
--- Mid-Priced Wet Dog Food						
--- Premium Wet Dog Food						
- Dog Food						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 51 Forecast Sales of Dog Food by Category: % Volume Growth 2022-2027

% volume growth

	2022/23	2022-27 CAGR	2022/27 Total
-- Dog Treats and Mixers	Data removed from sample		
-- Dry Dog Food			
--- Economy Dry Dog Food			
--- Mid-Priced Dry Dog Food			
--- Premium Dry Dog Food			
-- Wet Dog Food			
--- Economy Wet Dog Food			
--- Mid-Priced Wet Dog Food			
--- Premium Wet Dog Food			
- Dog Food			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 52 Forecast Sales of Dog Food by Category: % Value Growth 2022-2027

% constant value growth

	2022/2023	2022-27 CAGR	2022/27 Total
-- Dog Treats and Mixers	Data removed from sample		
-- Dry Dog Food			
--- Economy Dry Dog Food			
--- Mid-Priced Dry Dog Food			
--- Premium Dry Dog Food			
-- Wet Dog Food			
--- Economy Wet Dog Food			

- Mid-Priced Wet Dog Food
- Premium Wet Dog Food
- Dog Food

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

OTHER PET FOOD IN THAILAND - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2022 DEVELOPMENTS

Reopening of wet markets becomes the next opportunity

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Demand for fish increases despite the depressive economy

Content removed from sample

Working from home and reopening of country help boost sales of other pet food

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PROSPECTS AND OPPORTUNITIES

Return to volume growth, but other pets will remain less popular

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Sakura will maintain its lead in fish food thanks to recent developments

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Product innovations from small brands

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CATEGORY INDICATORS

Table 53 Other Pet Population 2017-2022

'000s of animals

2017 2018 2019 2020 2021 2022

Bird Population
Fish Population
Reptile Population
Small Mammal Population
Other Pet Population

Data removed from sample

Source: Euromonitor International from official statistics

CATEGORY DATA

Table 54 Sales of Other Pet Food by Category: Volume 2017-2022

Tonnes

2017 2018 2019 2020 2021 2022

- Bird Food
- Fish Food

Data removed from sample

- Small Mammal/Reptile Food

Other Pet Food

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 55 Sales of Other Pet Food by Category: Value 2017-2022

THB million

2017 2018 2019 2020 2021 2022

- Bird Food
- Fish Food
- Small Mammal/Reptile Food

Data removed from sample

Other Pet Food

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 56 Sales of Other Pet Food by Category: % Volume Growth 2017-2022

% volume growth

2021/22 2017-22 CAGR 2017/22 Total

- Bird Food
- Fish Food
- Small Mammal/Reptile Food

Data removed from sample

Other Pet Food

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 57 Sales of Other Pet Food by Category: % Value Growth 2017-2022

% current value growth

2021/22 2017-22 CAGR 2017/22 Total

- Bird Food
- Fish Food
- Small Mammal/Reptile Food

Data removed from sample

Other Pet Food

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 58 LBN Brand Shares of Bird Food: % Value 2018-2021

% retail value rsp

Brand (GBO) Company (NBO) 2018 2019 2020 2021

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 59 LBN Brand Shares of Fish Food: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 60 LBN Brand Shares of Small Mammal/Reptile Food: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 61 Distribution of Other Pet Food by Format: % Value 2017-2022

% retail value rsp	2017	2018	2019	2020	2021	2022
--------------------	------	------	------	------	------	------

Store-Based Retailing

- Grocery Retailers
 - Modern Grocery Retailers
 - Convenience Stores
 - Discounters
 - Forecourt Retailers
 - Hypermarkets
 - Supermarkets
 - Traditional Grocery Retailers
- Mixed Retailers
 - Department Stores
 - Mass Merchandisers
 - Variety Stores
 - Warehouse Clubs
- Non-Grocery Specialists

Data removed from sample

-- Pet superstores
 -- Pet shops
 -- Health and Beauty Specialist Retailers
 --- Beauty Specialist Retailers
 --- Chemists/Pharmacies
 --- Drugstores/parapharmacies
 --- Other Health and Beauty Retailers
 -- Home and Garden Specialist Retailers
 --- Home Improvement and Gardening Stores
 --- Homewares and Home Furnishing Stores
 -- Other Non-Grocery Specialists
 Non-Store Retailing
 - Direct Selling
 - Homeshopping
 - E-Commerce
 Non-retail channels
 - Veterinary clinics
 Total

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 62 Forecast Sales of Other Pet Food by Category: Volume 2022-2027

Tonnes

2022 2023 2024 2025 2026 2027

- Bird Food
 - Fish Food
 - Small Mammal/Reptile Food

Data removed from sample

Other Pet Food

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 63 Forecast Sales of Other Pet Food by Category: Value 2022-2027

THB million

2022 2023 2024 2025 2026 2027

- Bird Food
 - Fish Food
 - Small Mammal/Reptile Food

Data removed from sample

Other Pet Food

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 64 Forecast Sales of Other Pet Food by Category: % Volume Growth 2022-2027

% volume growth

2022/23 2022-27 CAGR 2022/27 Total

- Bird Food
- Fish Food
- Small Mammal/Reptile Food
- Other Pet Food

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Data removed from sample

Table 65 Forecast Sales of Other Pet Food by Category: % Value Growth 2022-2027

% constant value growth

2022/2023 2022-27 CAGR 2022/27 Total

- Bird Food
- Fish Food
- Small Mammal/Reptile Food
- Other Pet Food

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

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PET PRODUCTS IN THAILAND - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2022 DEVELOPMENTS

Surge in pet population and pet humanisation lead to rising demand for pet products

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Reopening of the country drives demand for pet products

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COVID-19 boosts distribution via e-commerce

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PROSPECTS AND OPPORTUNITIES

High innovation from A small brand with an eco-friendly product in cat litter

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Demand for pet health and wellbeing offers opportunities in pet healthcare

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Health trend also supports new innovations

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CATEGORY DATA

Table 66 Sales of Pet Products by Category: Value 2017-2022

THB million

2017 2018 2019 2020 2021 2022

Cat Litter
Pet Healthcare
Other Pet Products
Pet Products

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 67 Sales of Pet Products by Category: % Value Growth 2017-2022

% current value growth

2021/22 2017-22 CAGR 2017/22 Total

Cat Litter
Pet Healthcare
Other Pet Products
Pet Products

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 68 Sales of Pet Healthcare by Type: % Value 2017-2022

% retail value rsp

	2017	2018	2019	2020	2021	2022
--	------	------	------	------	------	------

Flea/Tick Treatments
Pet dietary supplements
Worming Treatments
Other Products
Total

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 69 Sales of Other Pet Products by Type: % Value 2017-2022

% retail value rsp

	2017	2018	2019	2020	2021	2022
--	------	------	------	------	------	------

Beauty Products
Accessories
Other
Total

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 70 NBO Company Shares of Pet Products: % Value 2017-2021

% retail value rsp

Company	2017	2018	2019	2020	2021
---------	------	------	------	------	------

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 71 LBN Brand Shares of Pet Products: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
-----------------------------------	---------------	------	------	------	------

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 72 Distribution of Pet Products by Format: % Value 2017-2022

% retail value rsp	2017	2018	2019	2020	2021	2022
--------------------	------	------	------	------	------	------

Store-Based Retailing

- Grocery Retailers
 - Modern Grocery Retailers
 - Convenience Stores
 - Discounters
 - Forecourt Retailers
 - Hypermarkets
 - Supermarkets
 - Traditional Grocery Retailers
- Mixed Retailers
 - Department Stores
 - Mass Merchandisers
 - Variety Stores
 - Warehouse Clubs
- Non-Grocery Specialists
 - Pet superstores
 - Pet shops
 - Health and Beauty Specialist Retailers
 - Beauty Specialist Retailers
 - Chemists/Pharmacies
 - Drugstores/parapharmacies

Data removed from sample

--- Other Health and
 Beauty Retailers
 -- Home and Garden
 Specialist Retailers
 --- Home Improvement
 and Gardening Stores
 --- Homewares and Home
 Furnishing Stores
 -- Other Non-Grocery
 Specialists
 Non-Store Retailing
 - Direct Selling
 - Homeshopping
 - E-Commerce
 Non-retail channels
 - Veterinary clinics
 Total

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 73 Forecast Sales of Pet Products by Category: Value 2022-2027

THB million

2022 2023 2024 2025 2026 2027

Cat Litter
 Pet Healthcare
 Other Pet Products
 Pet Products

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 74 Forecast Sales of Pet Products by Category: % Value Growth 2022-2027

% constant value growth

2022/2023 2022-27 CAGR 2022/27 Total

Cat Litter
 Pet Healthcare
 Other Pet Products
 Pet Products

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources