NEW ZEALAND TRADE & ENTERPRISE
Te Taurapa Tūhono

PET FOOD IN JAPAN

Southeast and East Asia Market Research

APRIL 2024

About this report

Background

This report has been prepared by NZTE's Southeast and East Asia Market Research team.

It is intended to present an overview of the pet food market in Japan for the benefit of New Zealand exporters.

This report focuses on dog and cat food only. All other types of pet food and pet care products are out of scope.

Methodology

This report primarily uses data from Euromonitor, ITC Trade Map, the Japan Pet Food Association (JPFA), and the Ministry of Agriculture, Forestry and Fisheries (MAFF).

Data from these sources has been supplemented with desk research and store visits.

All sources are listed in the footnotes at the bottom of each page.

Definitions

This report focuses on dog and cat food only. All other types of pet food and pet care products are out of scope.

Limitations

Import and export figures have not been adjusted for re-imports / re-exports, and must be read with caution.

Contents

Key takeaways

1 Market opportunity	• At **USD 4.1 billion**, Japan is the region's largest pet food market. • Future growth in the pet food market will be driven entirely by **premiumisation**. Volume sales are forecasted to fall, but value sales will continue to grow at a 2023-2028 CAGR of 2.1%. • Good growth prospects for **cat food** due to the growing cat population, and increased share of spend on cat treats.
2 Pet population	• The pet population is estimated at 6.8 million dogs and 9.1 million cats. The dog population has been steadily declining over the last 10 years, but the cat population recorded a modest increase. • Three-quarters of dogs in Japan weigh 10kg or less. 15% are ultra-small breeds such as toy poodles and chihuahuas.
3 Production, imports and exports	• Japan is a key export market for New Zealand pet food – it is the **4th** largest market for New Zealand. However, other markets supply pet food in far greater quantities to Japan such as Thailand, China, and South Korea. New Zealand was ranked as the **12th** largest exporter of pet food to Japan. • **Imports** account for a significant portion of Japan's pet food market. Japan imported a total of 209,687 tonnes of pet food in 2023. Thailand is the leading exporter of pet food to Japan, single-handedly supplying half of all imports by volume. • Domestic production totalled 310,362 tonnes in 2021. Japan has a strong domestic pet food manufacturing industry, and while most of it is consumed domestically, it also exports – mainly to the Greater China region and South Korea. • New Zealand's pet food exports to Japan by volume are increasing, but values have been falling. This is partially driven by the growing number of Japanese companies that outsource manufacturing to New Zealand under their own brands.

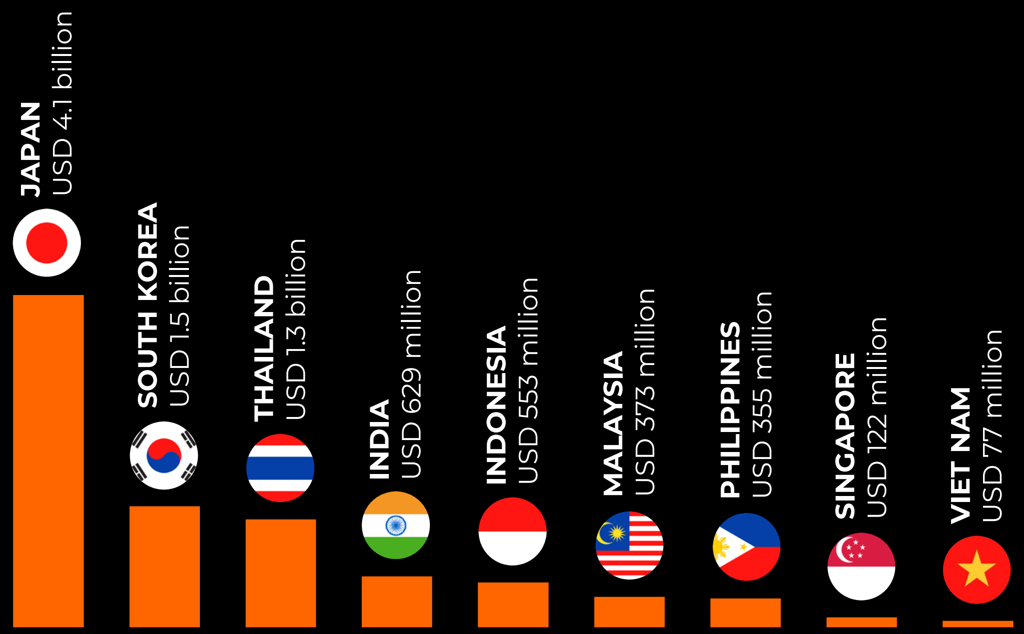
Key takeaways

4 Competitive landscape	• Domestic Japanese brands have a combined share of just over half of the market, at 54%. • The three largest multinational brands, Mars Inc, Colgate-Palmolive, and Nestlé, have a combined market share of 38%. • The remaining slice of the pie (which also includes other smaller Japanese and international brands) is still worth USD 328 million. • Inaba Pet Food and Unicharm are the top two Japanese companies in this space. Inaba Pet Food owns the cat treats segment with its Ciao Churu wet cat treats.
5 Distribution channels	• **Home centers and discounters** are the top purchase channel for pet owners in Japan. • However, there are differences in where dog and cat owners shop. Cat owners are more likely to purchase through drugstores and supermarkets, and far less likely to purchase from supermarkets than dog owners. • **E-commerce** sales still lags behind other Asian markets like China and South Korea, but it is still the second most important channel for dog owners. • However, it is **drugstores** that are seeing the fastest growth, especially among cat owners. • Growth in these channels has come at the expense of **supermarkets**, which have been declining. • **Channel diversification** is critical in Japan's fragmented retail landscape.
6 Pet owners	• The median monthly spend for dog owners on commercial dog food is approximately NZD 33 per month, compared to NZD22 for cat owners. Spend on dog and cat treats is similar, at around NZD 11 per month. • Spend on commercial dog food declined by 0.7% in 2023, but spend on dog treats recorded healthy growth. Cat treats recorded the highest growth of 15.2% in 2023. • In general, dog and cat owners feed dry pet food as the main component of the meal. Wet pet food is added as a topper or mixer, generally less than 40% of the meal.

SECTION 1

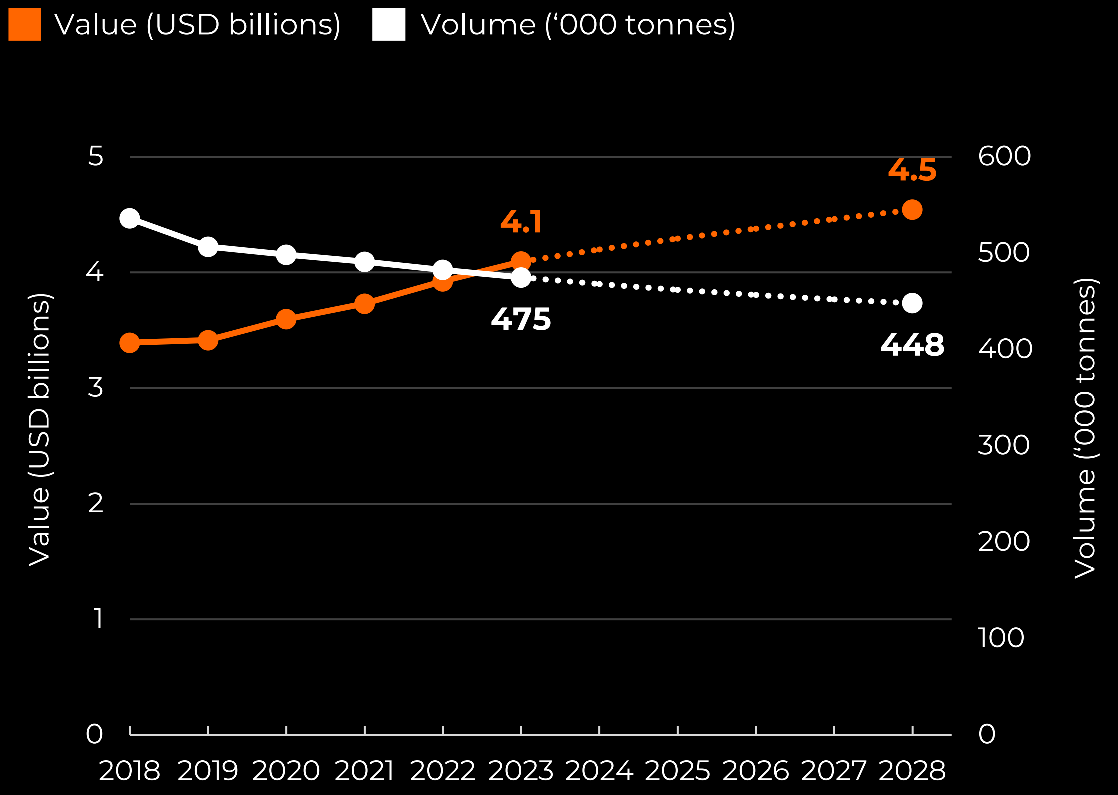
MARKET OPPORTUNITY

At USD 4.1 billion, Japan is the region's largest pet food market.



Source: Euromonitor
Retail market size of dog and cat food (2023)

PET FOOD
Retail market size



Future growth in the pet food market will be driven entirely by premiumisation.

While the pet food market is forecast continue growing at a 2023-2028 CAGR of **2.1%** to reach **USD 4.5 billion** by 2028, volume sales are expected to decline to 448 kilotonnes.

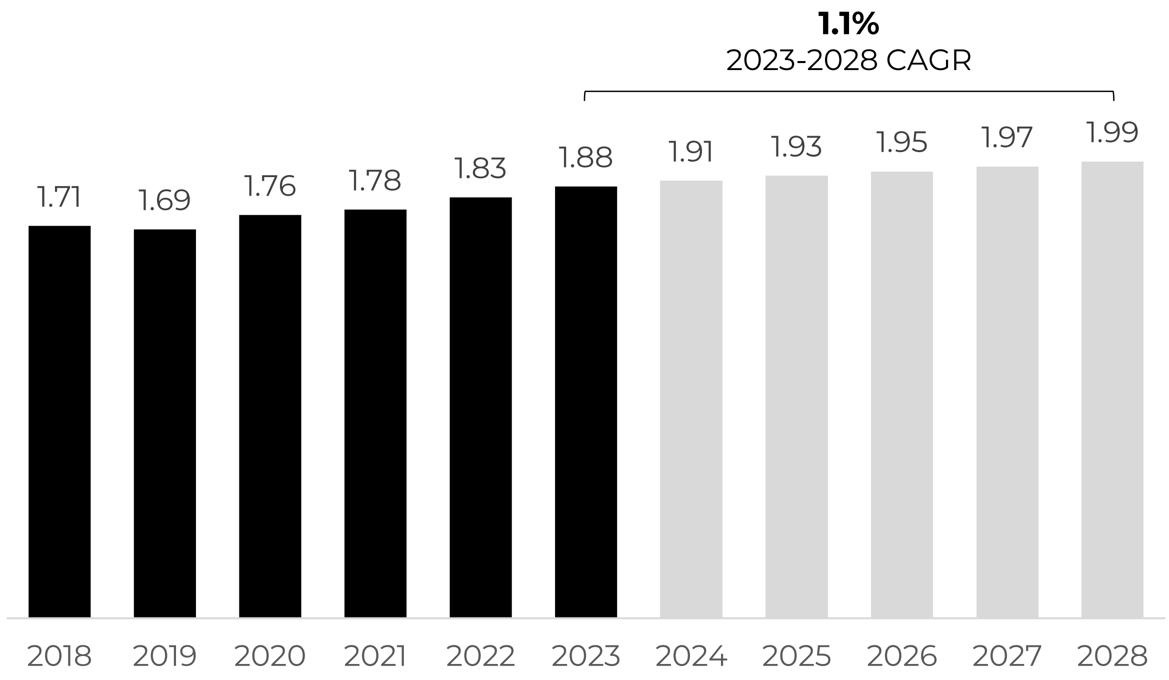
Amidst a backdrop of plummeting birthrates in Japan, pets will become even more valued members of the family.

Source: Euromonitor

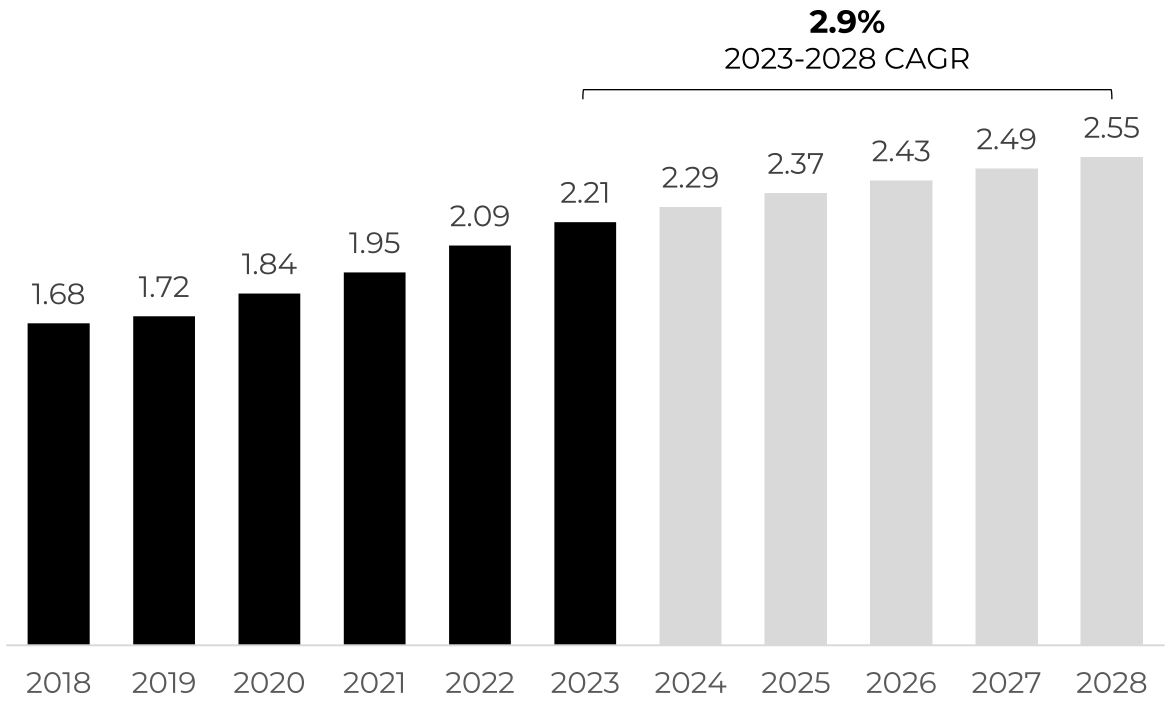
Cat food will account for 56% of the pet food market by 2028, up from 54%

Dog food is forecasted to grow at a modest 2023-2028 CAGR of 1.1%, constrained by the declining dog population. On the other hand, prospects for cat food are more positive with a growth outlook of 2.9%. Cat food will also account for a growing share of the pet food market in Japan.

DOG FOOD
Retail market size, in USD billions



CAT FOOD
Retail market size, in USD billions

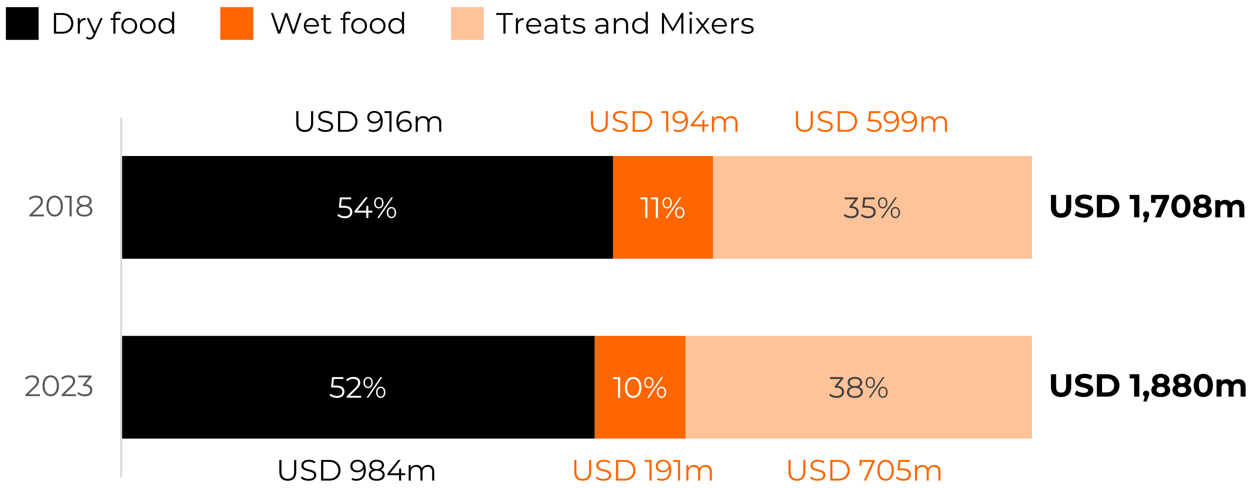


Source: Euromonitor

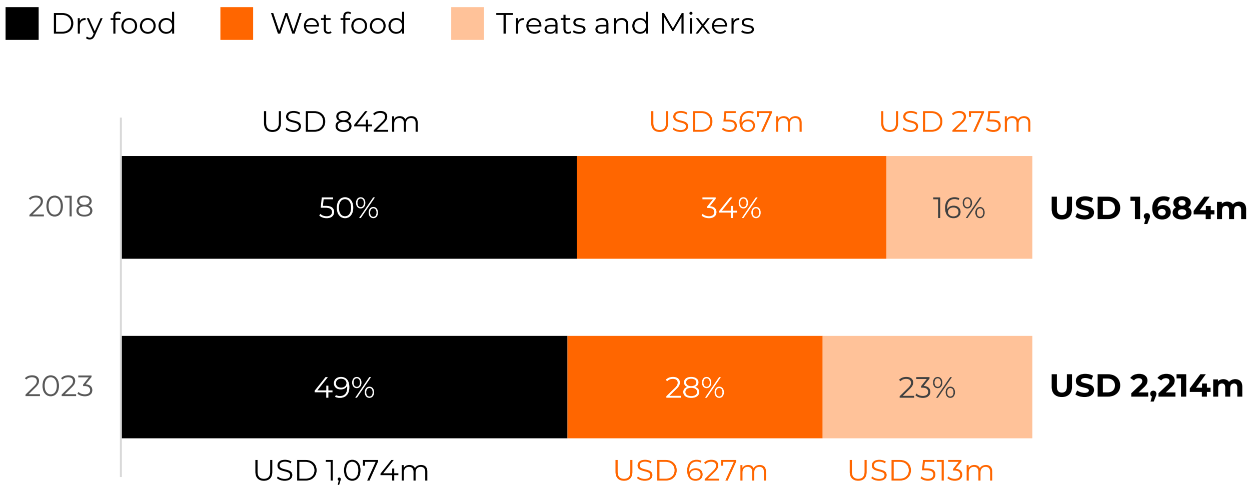
Treats and mixers are the fastest growing segment of the pet food market

Dry food accounted for half of the pet food market in Japan, while treats and mixers are outpacing growth in both dry and wet pet food. Sales of cat treats and mixers have almost doubled within the past five years and accounted for a quarter of the cat food market.

DOG FOOD BY FORMAT
% of total sales



CAT FOOD BY FORMAT
% of total sales



Source: Euromonitor

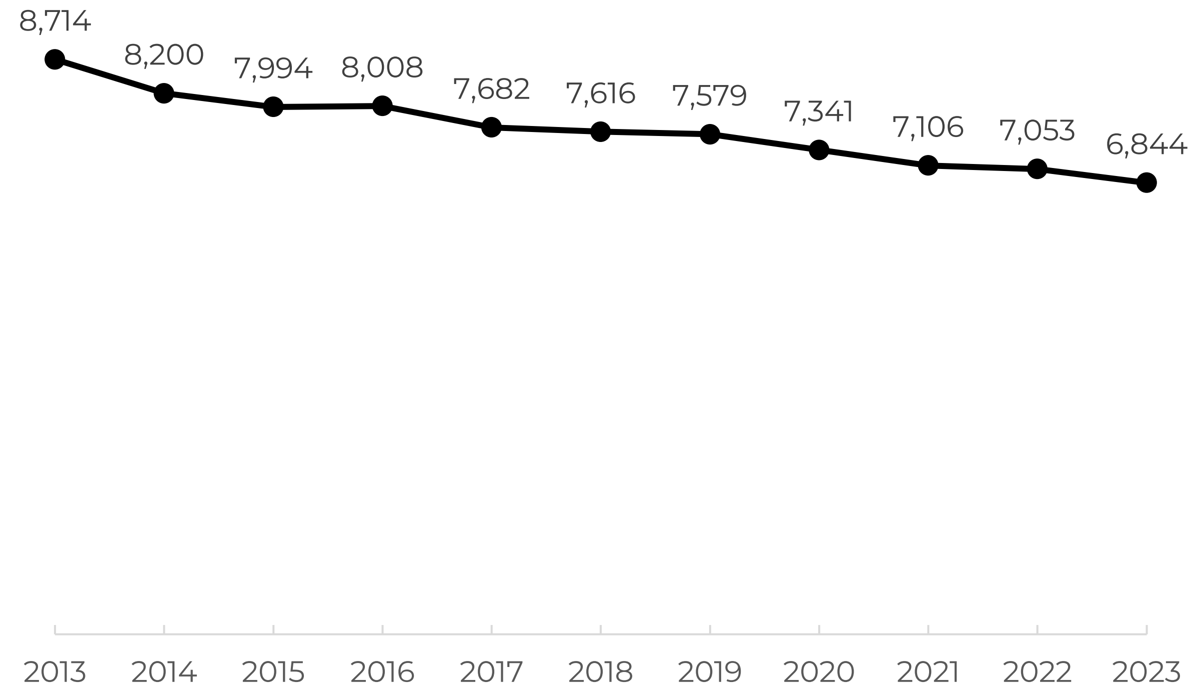
SECTION 2

PET POPULATION

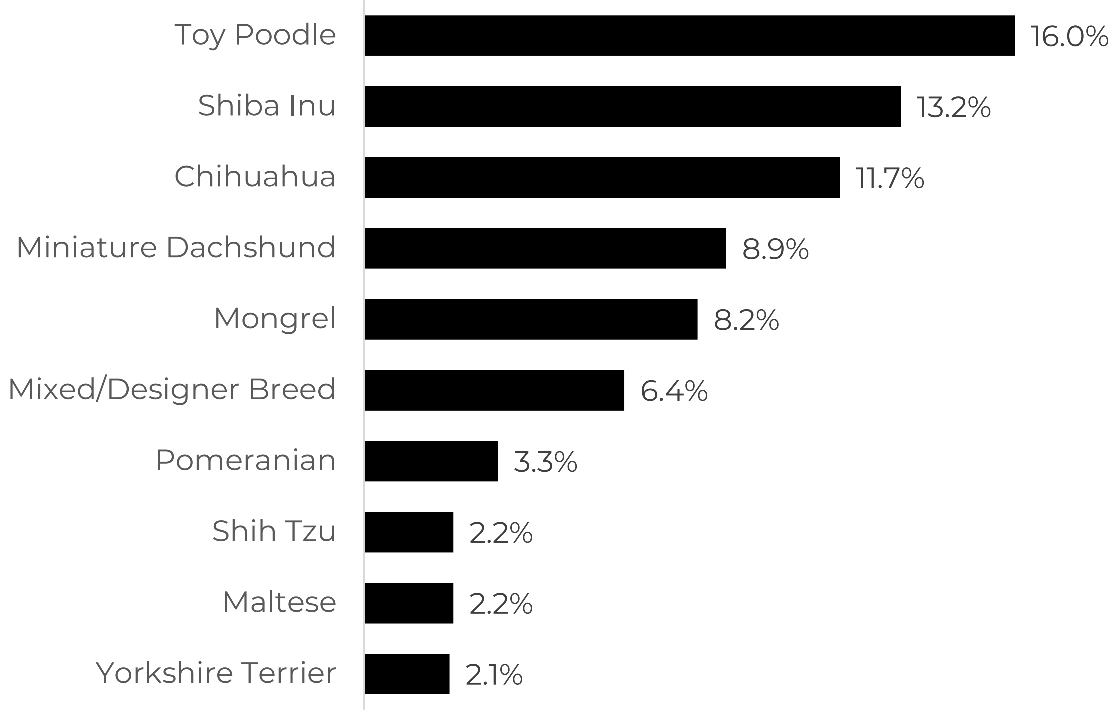
A combination of socio-economic factors impacts dog ownership

Dog ownership is declining as consumers grapple with the rising cost of living. Inflation hit a 41-year high in 2023, and pet food companies have reportedly raised prices by 3% to 10%, or more. Concurrently, an ageing population, small apartments and rules against pets in rentals, and rising single-person households has impacted dog ownership.

DOG POPULATION
Number of animals ('000s)



MOST POPULAR DOG BREEDS IN JAPAN (2023)
% of respondents

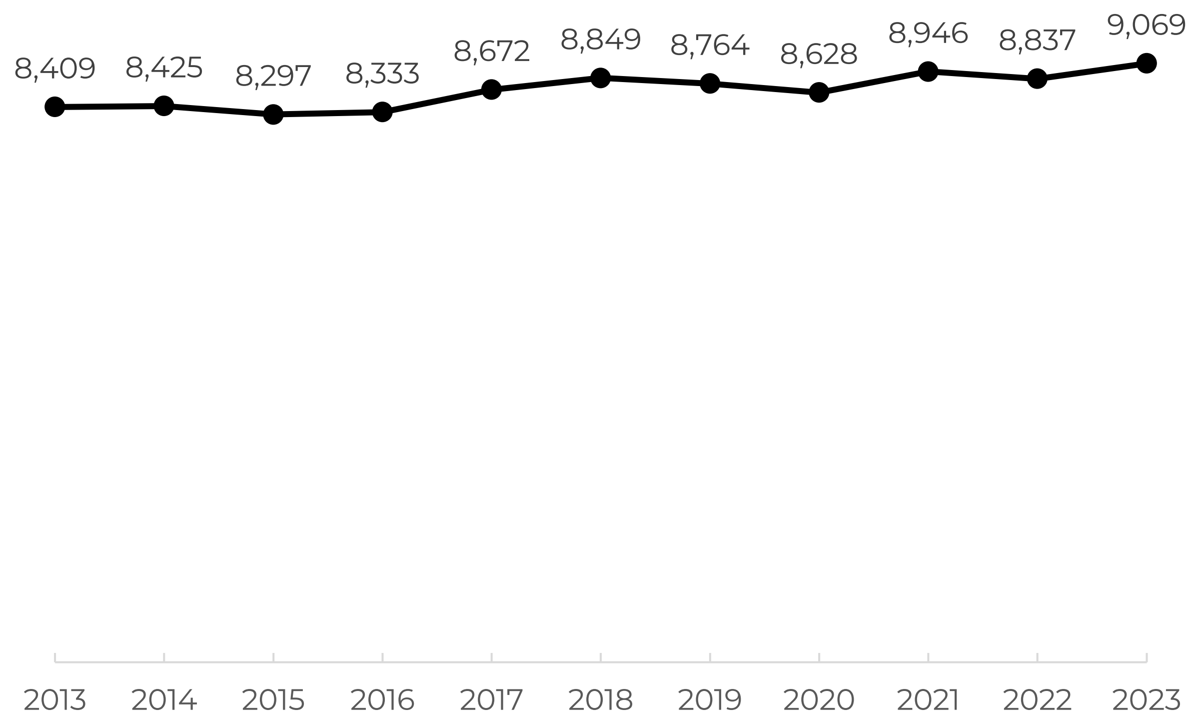


Sources: Japan Pet Food Association, Nikkei Asia, Pet Food Industry

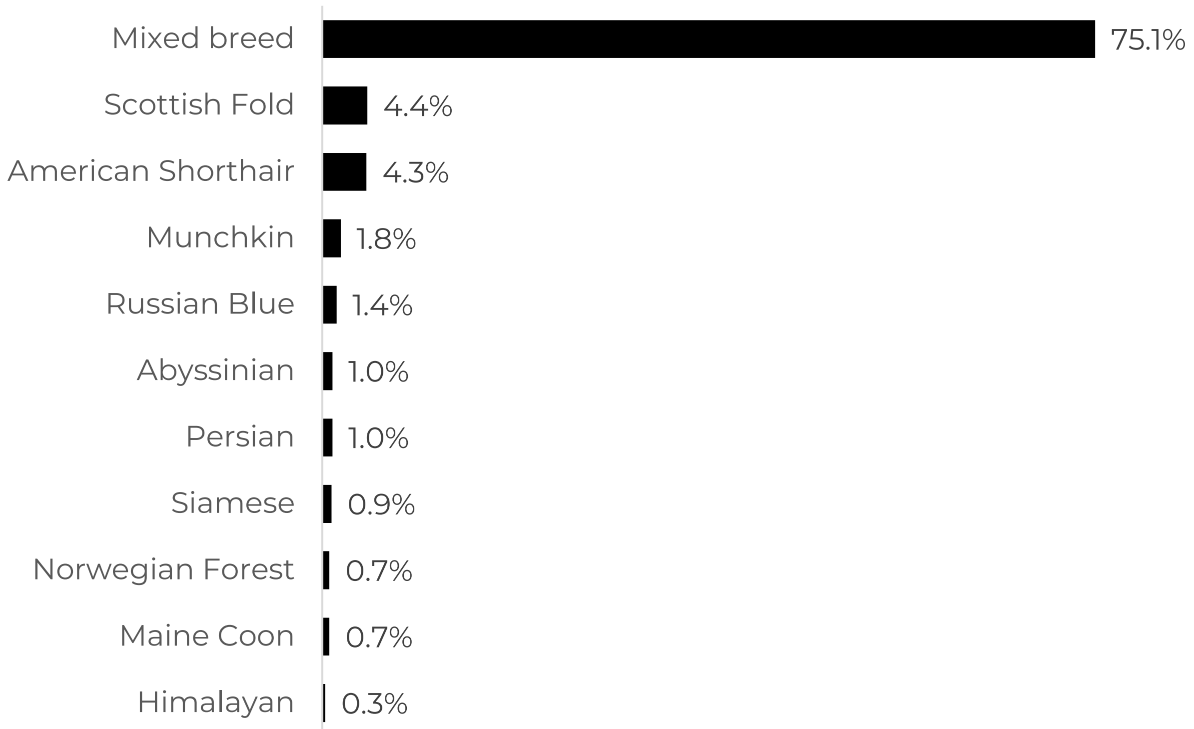
Cats outnumber dogs in Japan by almost three to two

The cat population reached 9.1 million in 2023, recording a modest increase of 2.6%. About half of domestic cats in Japan are mixed breed, as Japanese are far less likely to purchase a cat from a pet store compared to dogs. Many families adopt stray cats, or obtain them from friends or relatives.

CAT POPULATION
Number of animals ('000s)



MOST POPULAR CAT BREEDS IN JAPAN
As of May 2023

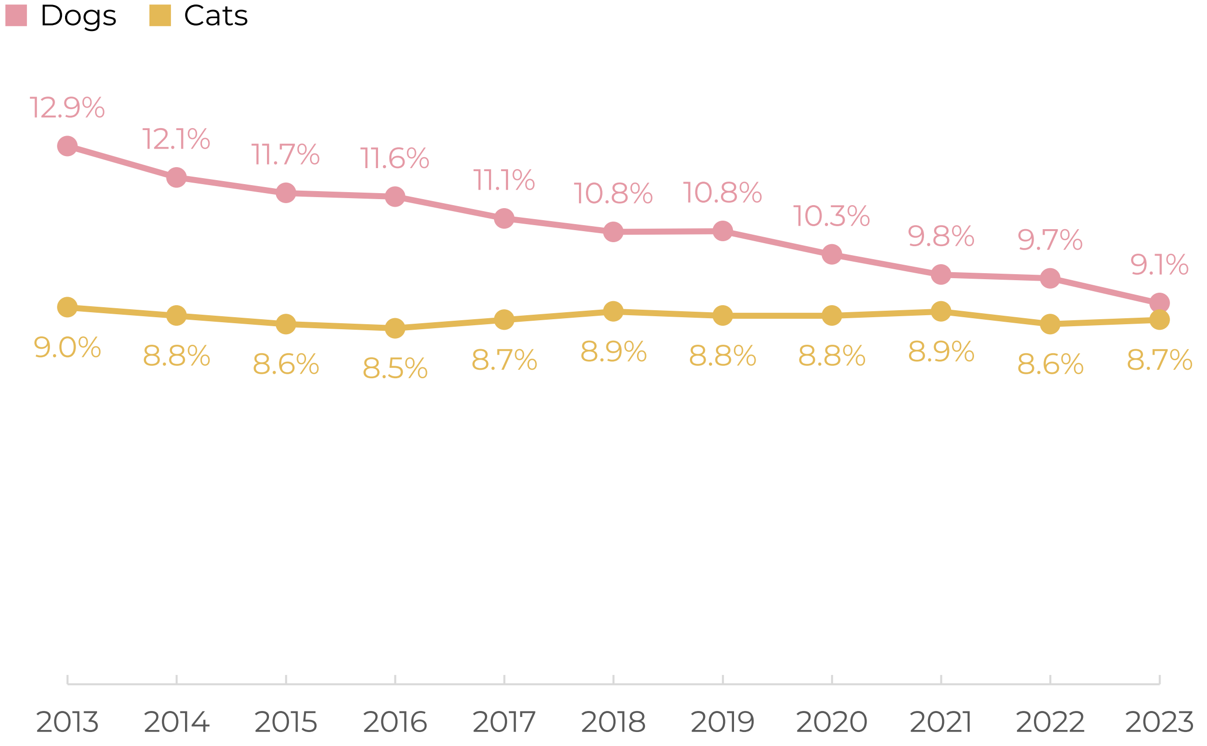


Sources: Japan Pet Food Association, Statista

The number of households keeping cats has held steady against falling dog ownership

The number of households keeping dogs has fallen from 12.9% in 2013 to 9.1% in 2023. On the other hand, the number of households keeping cats has held constant at around 9% over the last ten years. Households are more likely to own multiple cats, given that cats are far more independent and require less time and attention than dogs.

HOUSEHOLDS WITH PETS
% of total



AVERAGE NUMER OF PETS PER HOUSEHOLD
Number of animals

1.29

Number of dogs per household (2023)

The number of dogs per household rose to 1.29 in 2023, up from 1.24 in 2013.

1.78

Number of cats per household (2023)

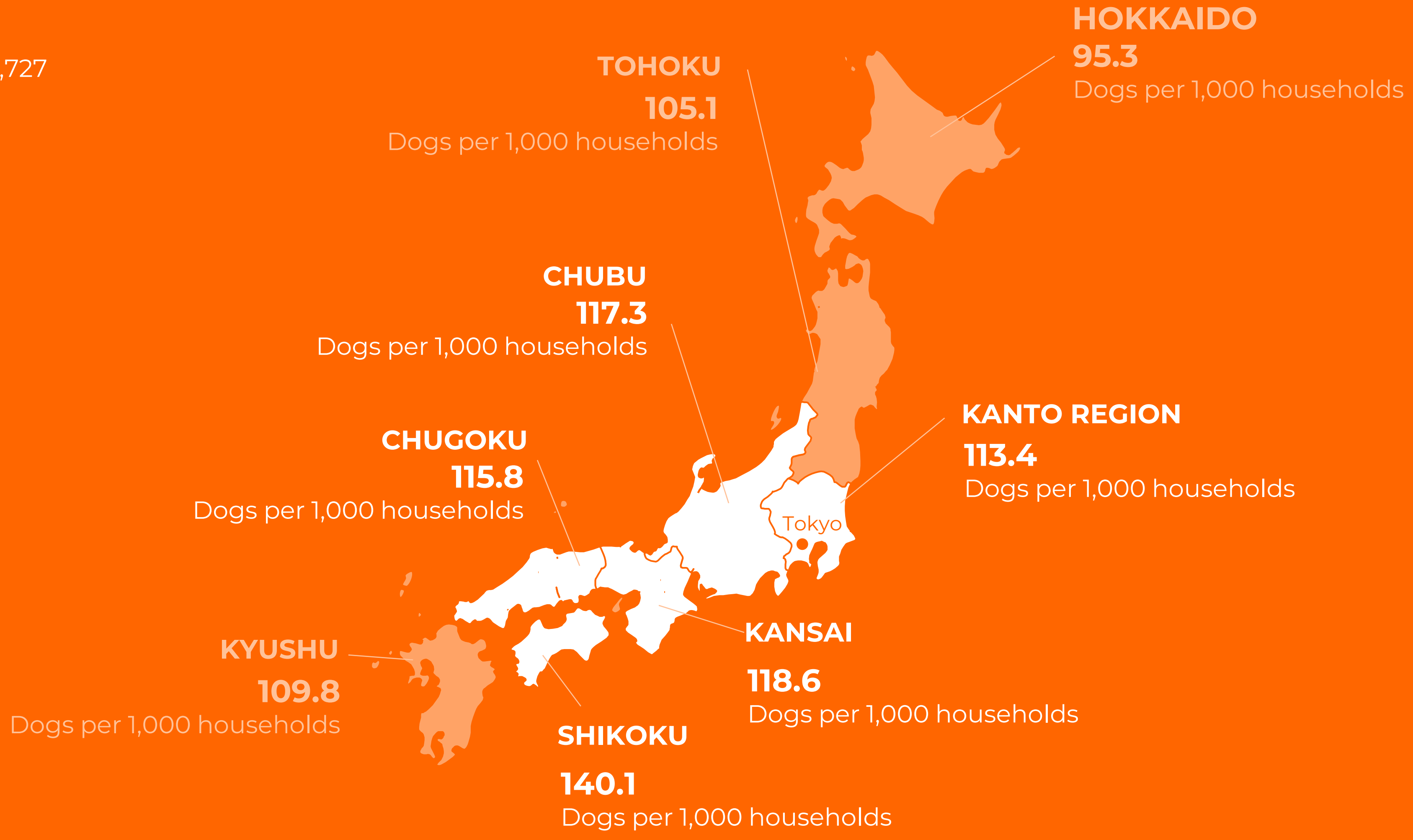
The number of cats per household rose to 1.78 in 2023, up from 1.71 in 2013.

Source: Japan Pet Food Association

Tokyo and Kanagawa (both located in the Kanto region) have the highest number of registered dogs

NUMBER OF REGISTERED DOGS (TOP 15 PREFECTURES)
As of 31 March 2022

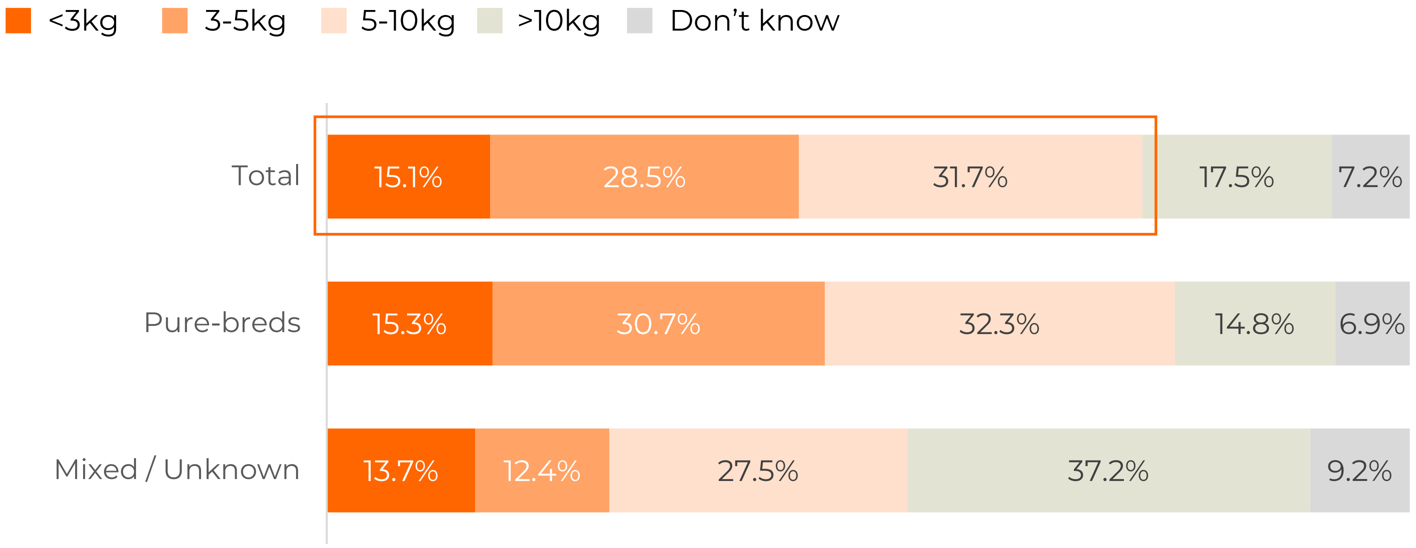
Tokyo	543,727
Kanagawa	442,421
Aichi	425,086
Osaka	394,453
Saitama	347,532
Chiba	309,719
Hyogo	287,371
Fukuoka	246,067
Hokkaido	236,022
Shizuoka	195,452
Ibaraki	159,430
Hiroshima	143,577
Kyoto	121,780
Gifu	115,832
Mie	113,979



Sources: Ministry of Health, Labour and Welfare, Japan Population Census 2020
Note: Statistics for the number of cats by prefecture is unavailable.

Three-quarters of dogs in Japan weigh 10kg or less. 15% are ultra-small breeds such as toy poodles and chihuahuas.

WEIGHT OF DOGS
% of respondents



Source: Japan Pet Food Association

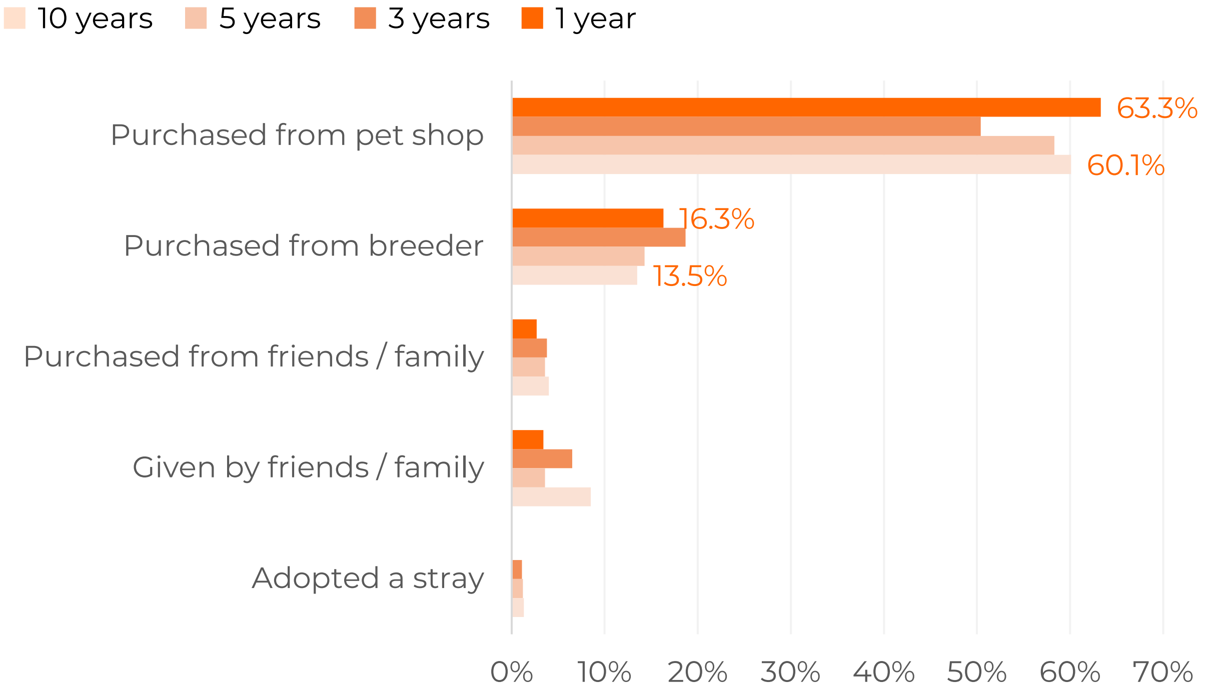
Total (n = 1,261); Pure-breds (n = 1,108); Mixed / Unknown (n = 153)

More Japanese consumers are opting to buy their pets from pet shops

Japanese consumers mainly purchase dogs from pet shops, or directly from breeders. On the other hand, about a quarter of pet cats are adopted, or given by friends and family. However, there is a clear trend towards purchasing cats from pet shops or directly from breeders.

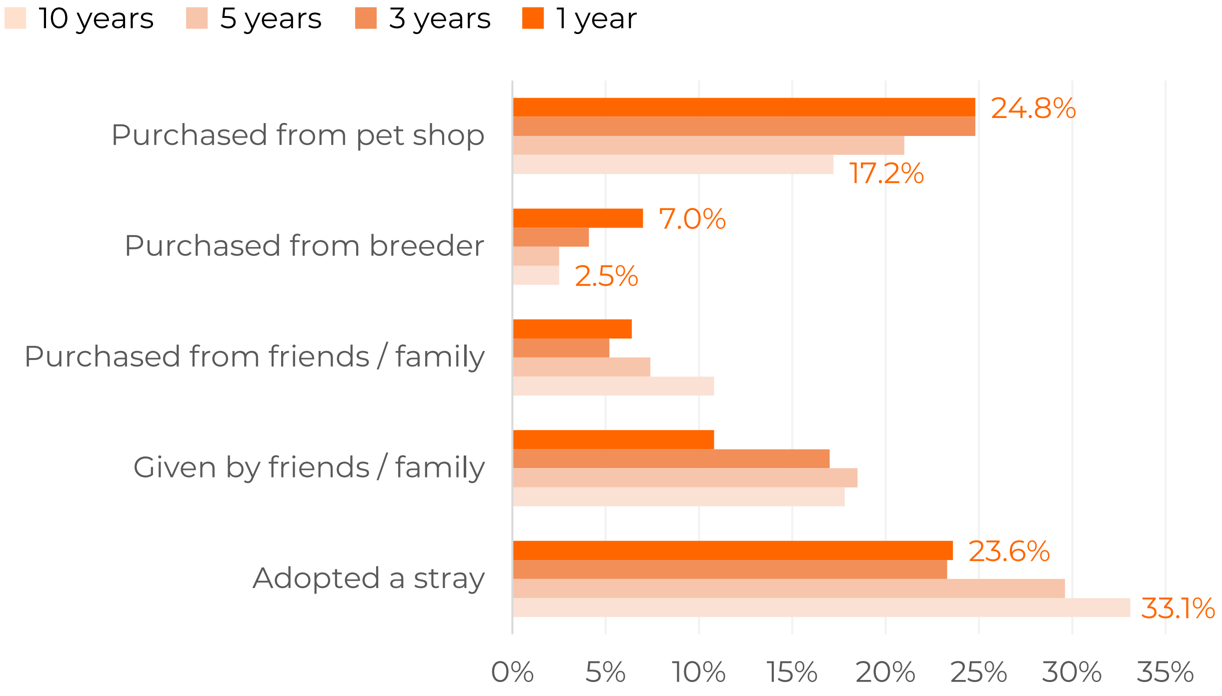
WHERE CONSUMERS BUY DOGS
% of respondents

Those who began keeping dogs within the last:



WHERE CONSUMERS BUY CATS
% of respondents

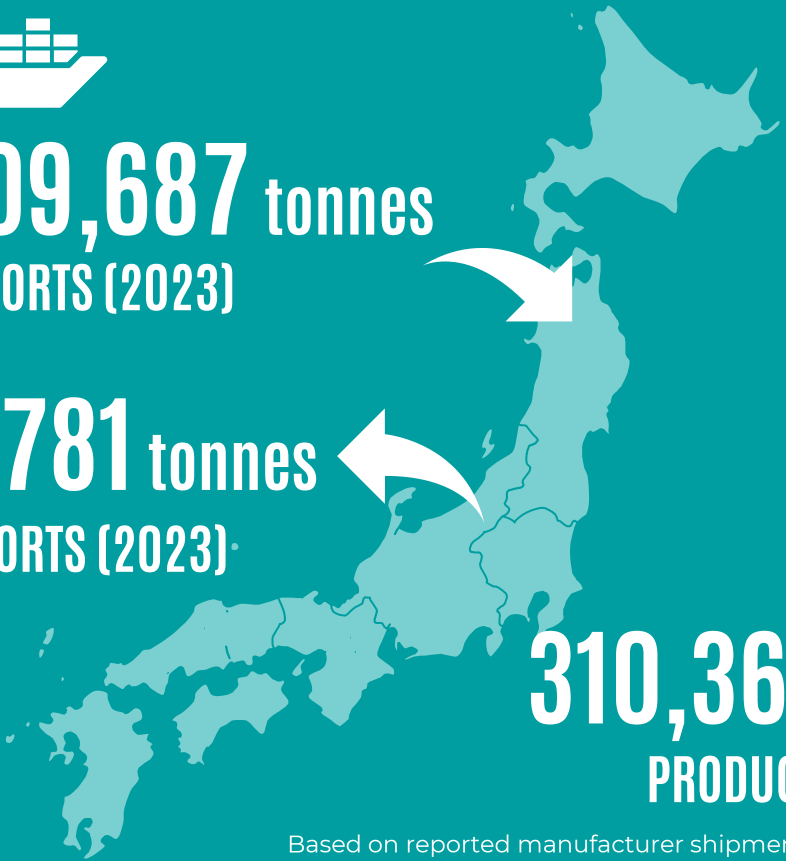
Those who began keeping dogs within the last:



Source: Japan Pet Food Association
Note: Only selected survey options are presented on this page. For the full survey results, please refer to the Japan Pet Food Association Survey 2023, Section 4, pages 45 and 47.

SECTION 3

PRODUCTION, IMPORTS AND EXPORTS



209,687 tonnes
IMPORTS (2023)

4,781 tonnes
EXPORTS (2023)

310,362 tonnes
PRODUCTION (2021)

Based on reported manufacturer shipments from companies surveyed in MAFF's Pet Food Industry Survey 2022

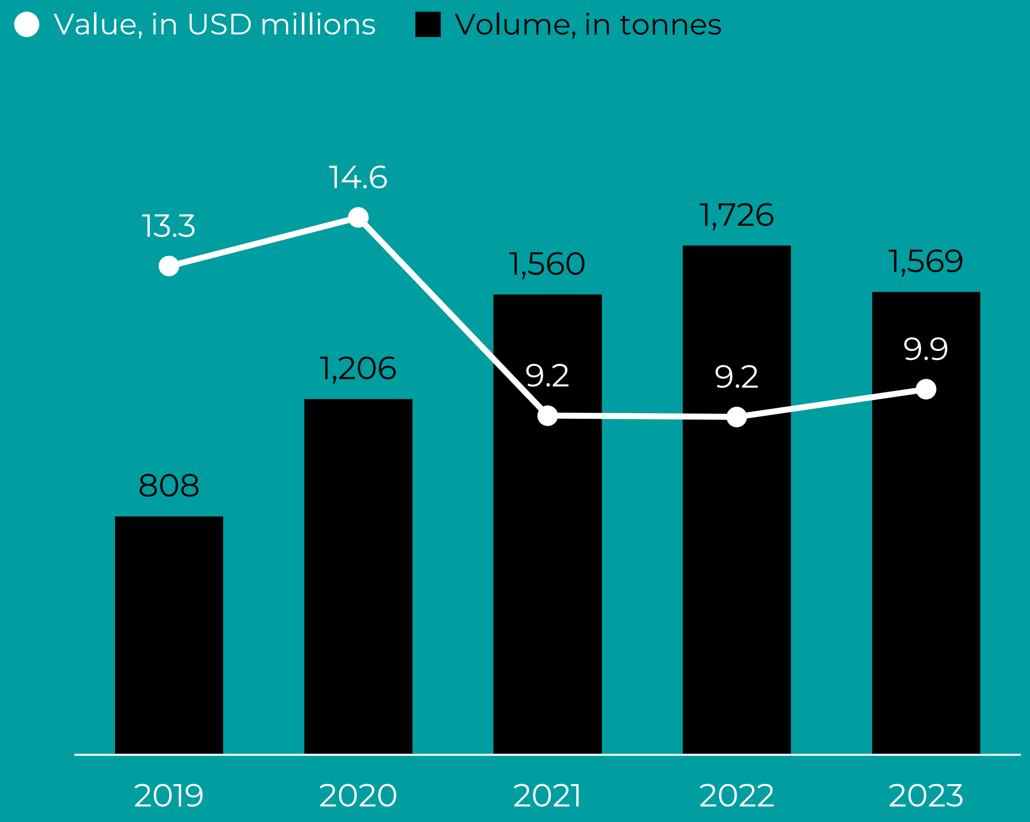
Imports account for a significant portion of Japan's pet food market.

Thailand is the leading exporter of pet food to Japan, single-handedly supplying half of all imports by volume.

Japan has a strong domestic pet food manufacturing industry, and it also exports – mainly to the Greater China region and South Korea.

Sources: ITC Trade Map, Ministry of Agriculture, Forestry and Fisheries (MAFF) Pet Food Industry Survey 2022
Note that re-exports have not been accounted for.

NEW ZEALAND'S PET FOOD EXPORTS TO JAPAN



New Zealand's pet food exports to Japan by volume are increasing, but values have been falling.

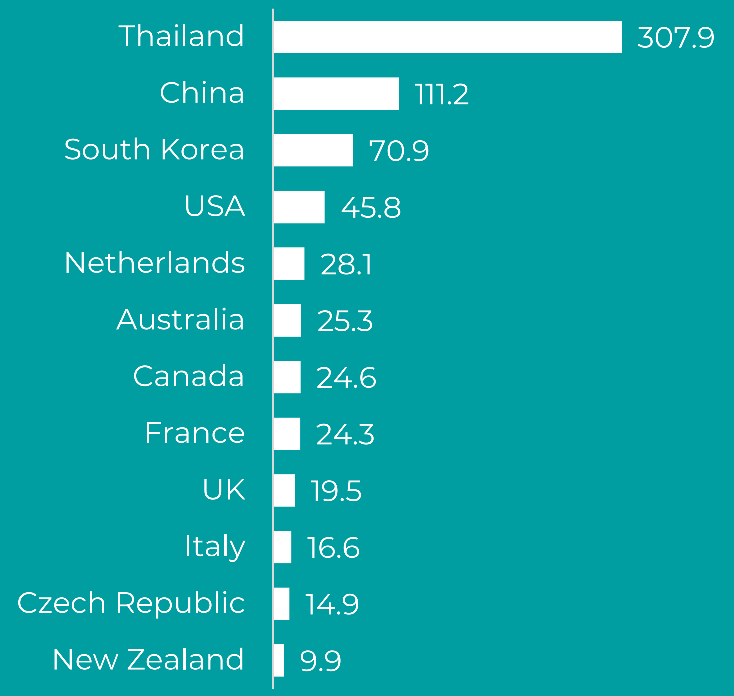
This is partially driven by the growing number of Japanese companies that outsource manufacturing to New Zealand under their own brands.

Source: ITC Trade Map
Notes: For HS 230910 – Dog or cat food, put up for retail sale; based on Japan as reporter. Note that re-imports and re-exports have not been accounted for.

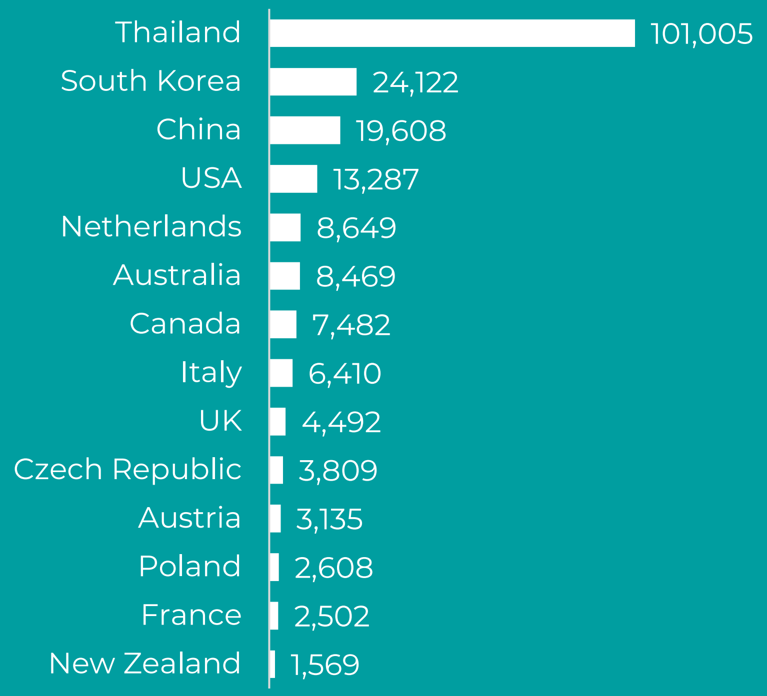
By value, New Zealand was the 12th largest exporter of pet food to Japan

Japan is a key export market for New Zealand pet food – it is the 4th largest market for New Zealand, accounting for 6% of total pet food exports in 2023. However, other markets supply pet food in far greater quantities to Japan such as Thailand, China, and South Korea, and New Zealand was ranked as the 12th largest exporter of pet food to Japan.

TOP EXPORTERS OF PET FOOD TO JAPAN (2023)
In USD millions



TOP EXPORTERS OF PET FOOD TO JAPAN (2023)
In tonnes

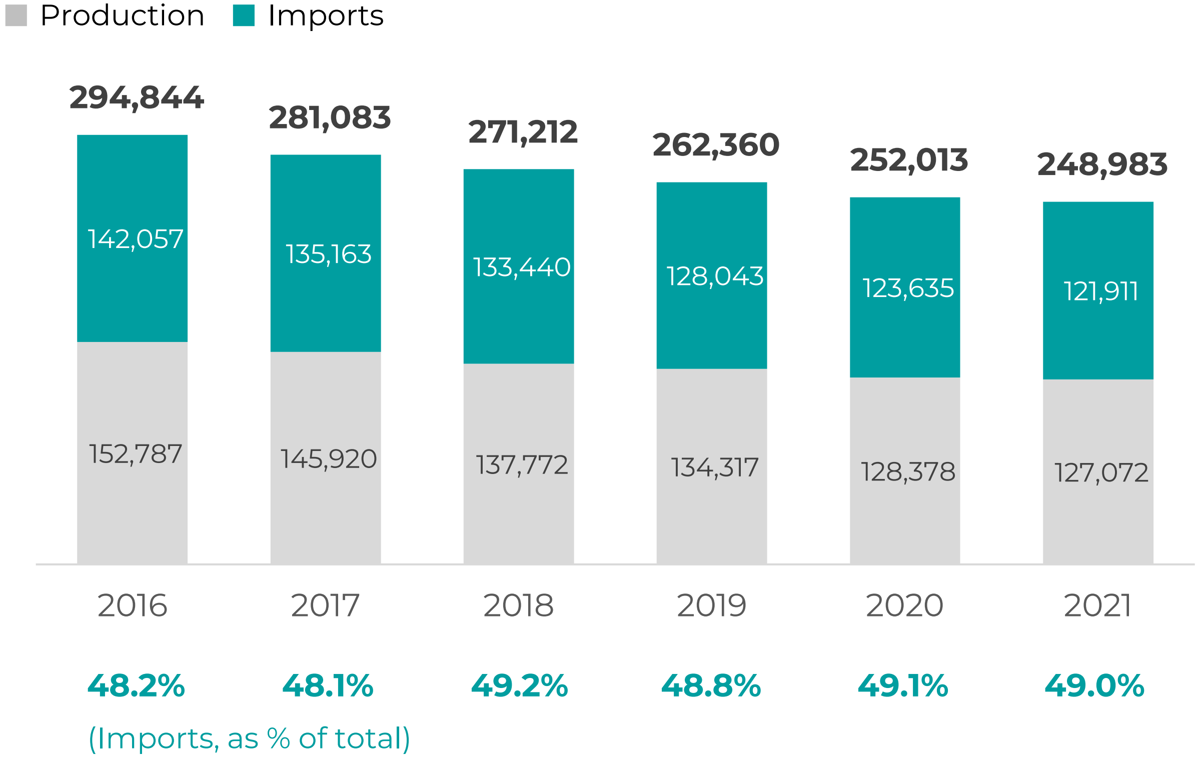


Source: ITC Trade Map
Notes: For HS 230910 – Dog or cat food, put up for retail sale; based on Japan as reporter. Note that re-imports and re-exports have not been accounted for.

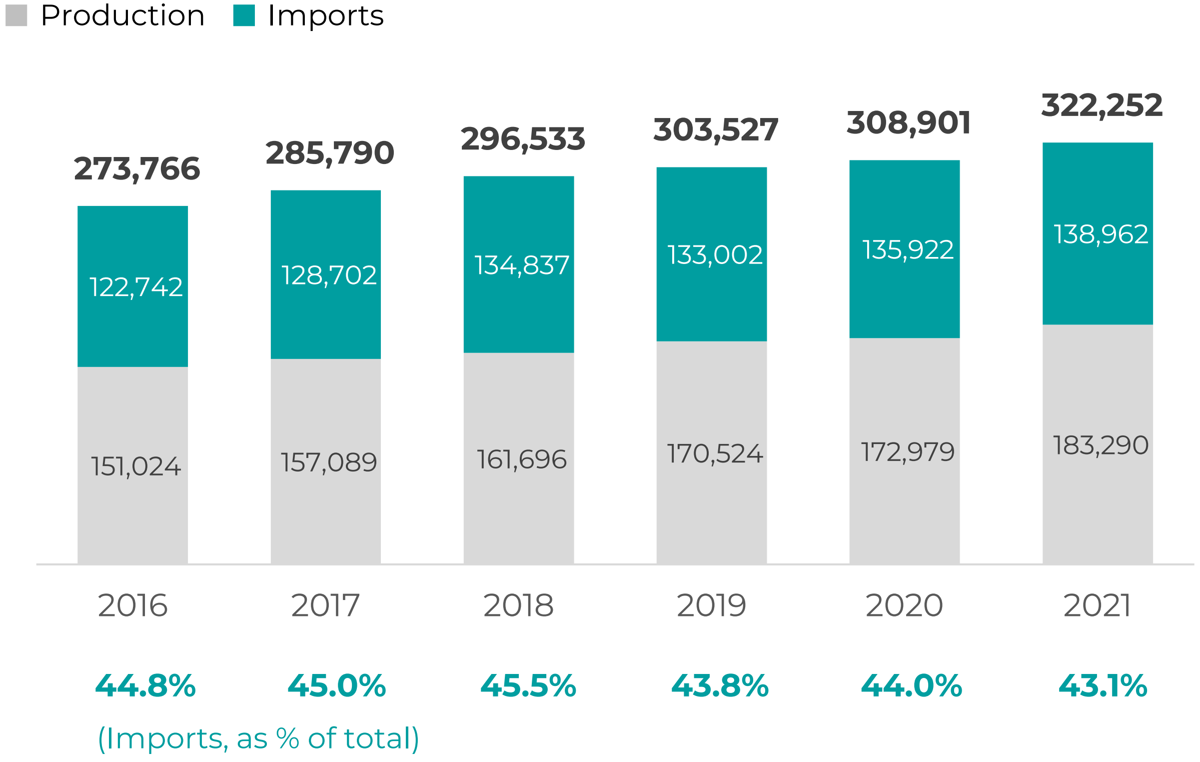
Imports account for close to half of Japan's pet food market

Imported dog food makes up half of the dog food market, of which the US and France are the leading suppliers. Imports make up a smaller share of the cat food market due to the strength of domestic brands, and Thailand alone supplies more than half of all cat food imports by Japan.

DOG FOOD
In tonnes



CAT FOOD
In tonnes

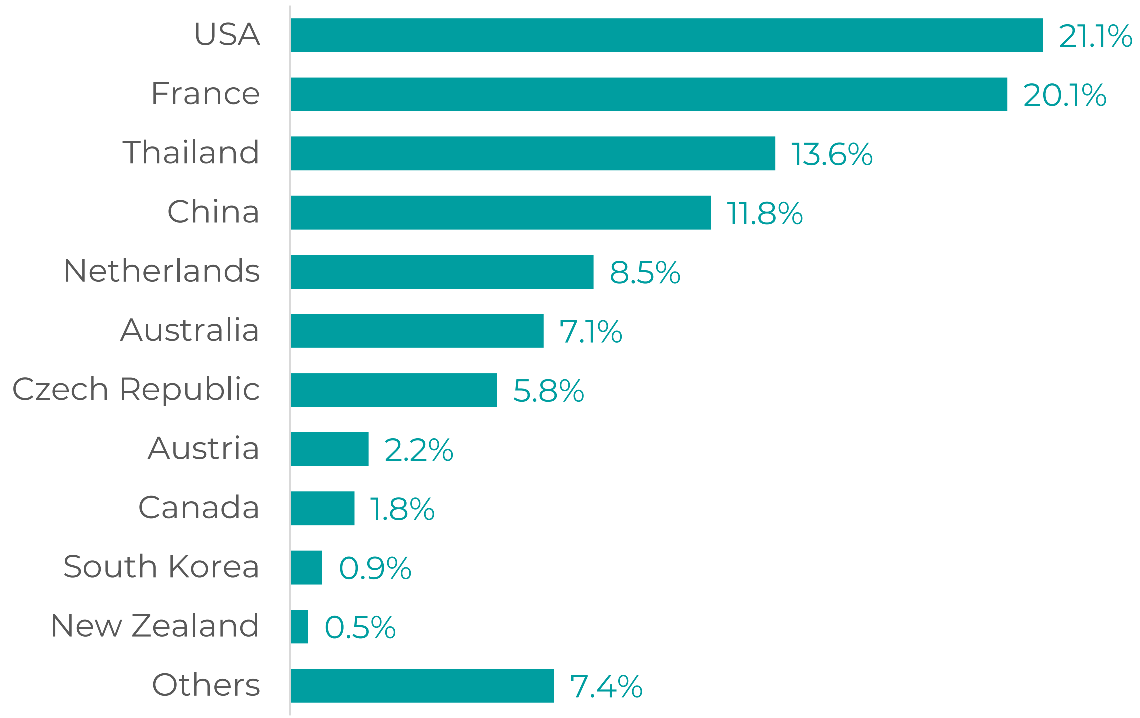


Source: Ministry of Agriculture, Forestry and Fisheries (MAFF) Pet Food Industry Survey 2022
Based on reported manufacturer shipments from companies that participated in the Ministry of Agriculture, Forestry and Fisheries' (MAFF) Pet Food Industry Survey 2022

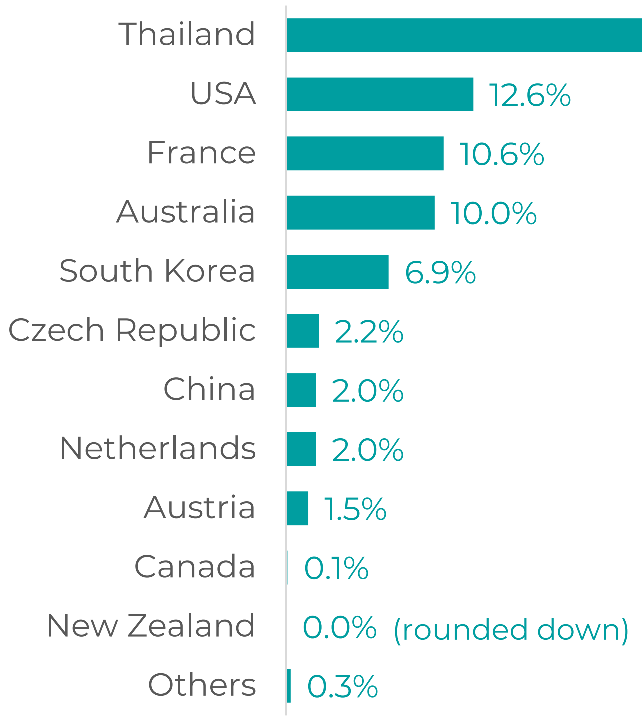
USA, France and Thailand are the leading exporters of pet food to Japan

While the USA and France are the top exporters of dog food to Japan, Thailand alone accounted for more than half of all cat food imports by Japan in 2021. This is due to Thailand's substantial capabilities in food processing, particularly in tuna and seafood.

DOG FOOD: TOP EXPORTERS TO JAPAN (2021)
% of total volume



CAT FOOD: TOP EXPORTERS TO JAPAN (2021)
% of total volume

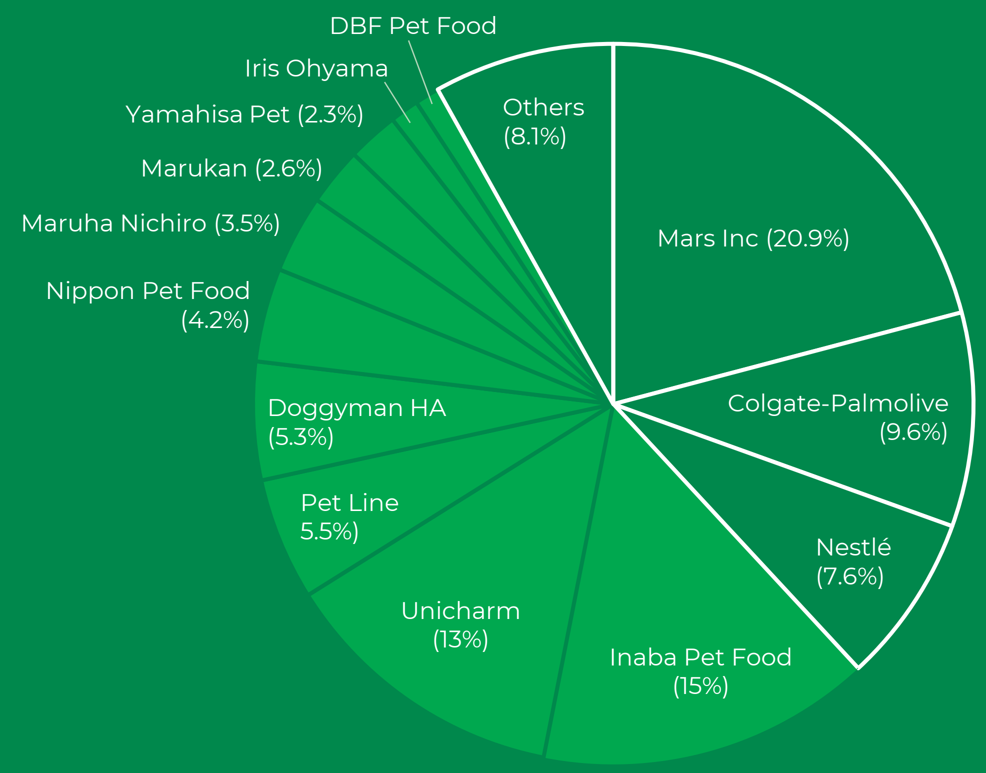


Source: Ministry of Agriculture, Forestry and Fisheries (MAFF) Pet Food Industry Survey 2022

SECTION 4

COMPETITIVE LANDSCAPE

COMPANY SHARES (2022)
% of retail market by value



Domestic Japanese brands have a combined share of just over half of the market, at 54%.

The three largest multinational brands, Mars Inc, Colgate-Palmolive, and Nestlé, have a combined market share of 38%.

The remaining slice of the pie (which also includes other smaller Japanese and international brands) is still worth USD 328 million.

Source: Euromonitor

Dog food: Brand shares

International brands such as Royal Canin, Hill's, and Cesar have a strong foothold in the Japanese market. Local brands such as Grand Deli and Aiken Genki by Unicharm Corporation, and Inaba by Inaba Pet Foods, are also top brands in Japan.

DRY DOG FOOD (TOP 10 BRANDS)
% of total sales

Brand Name	2022
Royal Canin	20.3%
Hill's Science Diet	16.1%
Hill's Prescription Diet	10.4%
Grand Deli	7.8%
Nutro	6.7%
Aiken Genki	5.7%
Iams	4.3%
Best Balance	3.2%
Combo	2.7%
Pedigree	2.6%
Others	**20.2%**

WET DOG FOOD (TOP 10 BRANDS)
% of total sales

Brand Name	2022
Cesar	19.5%
DBF	15.0%
Inaba	11.4%
Pedigree	8.6%
Grand Deli	7.5%
Royal Canin	7.4%
Iris	4.7%
Hill's Science Diet	3.4%
Hill's Prescription Diet	3.3%
Yeaster	2.7%
Others	**16.5%**

DOG TREATS AND MIXERS (TOP 10 BRANDS)
% of total sales

Brand Name	2022
Petio	12.6%
Inaba	12.1%
Gonta	9.8%
Saya	6.6%
Iris	6.1%
Mutenka Ryohin	4.6%
Whident	3.0%
DBF	1.9%
Grand Deli	1.5%
Vita-One	0.5%
Others	**41.3%**

Source: Euromonitor

Cat food: Brand shares

In the cat food category, Inaba Pet Food is the undisputed market leader with 23% market share overall. Ciao by Inaba has one-fifth of the wet food category, and is the cat treat of choice in Japan. With only 2.3% of the market remaining for other cat treat brands, this is an extremely competitive segment.

DRY CAT FOOD (TOP 10 BRANDS)
% of total sales

Brand Name	2022
Royal Canin	16.2%
Gin No Spoon	13.4%
ONE	8.8%
Canet	6.4%
Combo	6.3%
Hill’s Science Diet	6.1%
Neko Genki	5.1%
Sheba	5.1%
Hill’s Prescription Diet	4.2%
Carat	3.9%
Others	**24.5%**

WET CAT FOOD (TOP 10 BRANDS)
% of total sales

Brand Name	2022
Ciao	21.5%
Gin No Spoon	12.5%
Kal Kan	12.2%
Mon Petit	11.4%
Miaw Miaw	8.6%
Felix	5.8%
Kurokan	3.2%
Osakana Seikatsu	3.1%
Canet	2.2%
Royal Canin	2.1%
Others	**17.4%**

CAT TREATS AND MIXERS (TOP 10 BRANDS)
% of total sales

Brand Name	2022
Ciao	70.1%
Mon Petit	10.1%
Gin No Spoon	6.6%
Sheba	5.1%
Combo	2.7%
Dreamies	0.9%
CattyMan	0.8%
Petio	0.8%
Marukan	0.3%
Smack	0.3%
Others	**2.3%**

Source: Euromonitor

Inaba Pet Food

About the company

Inaba Pet Food is a subsidiary of INB Holdings, which manages Inaba Foods and other group companies.

Inaba Pet Food manufactures dog and cat food under the **Inaba** brand for dogs, and **Ciao** for cats.

In 2012, Inaba Pet Food launched Ciao Churu, a novel liquid snack for cats sold in sachets. Ciao Churu was a hit product, becoming Japan's bestselling cat treat with 70% market share.

In November 2023, Inaba Foods announced that it will be investing NZD 128 million in its new pet food factory that will be built in Aichi.

いなば CIAO チャオ

PRODUCT SPOTLIGHT

Marketing and social media has played a large role in the popularity of Ciao Churu. The brand began airing commercials for Churu in 2015, and since then, the "Ciao Churu" jingle has become instantly recognisable to pet owners. Cat owners began posting their own videos imitating the commercial on social media, to the extent that Inaba Pet Food released an app called "Churu Maker" that lets cat owners create their own Ciao Churu advertisement video.

Sources: Inaba Pet Food, Euromonitor, Nikkei

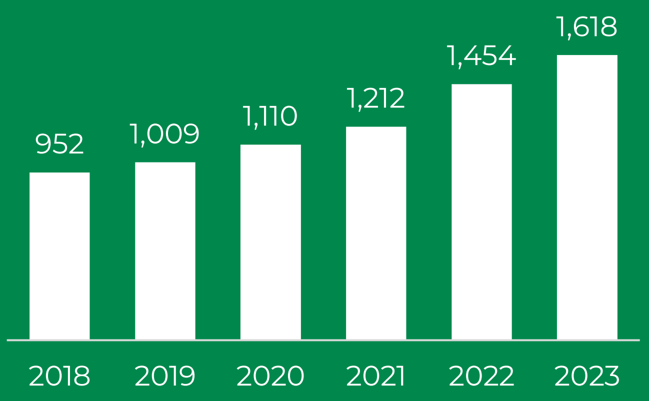
Unicharm

About the company

Unicharm Corporation was founded in 1961. The company has a presence in more than 80 countries, and recorded net sales of JPY 942 billion (**NZD 10.9 billion**) in its fiscal year 2023.

The company has three major business units: personal care, pet care, and others (industrial products). Pet care accounted for 15% of its total sales in 2023.

PET CARE SEGMENT
Net sales, in NZD millions



Brand Portfolio

	DOG FOOD	CAT FOOD
Grand Deli	●	
Aiken Genki	●	
Best Balance	●	
Physicalife	●	●
AllWell		●
Neko Genki		●
Gin no Sara	●	
Gin no Spoon		●

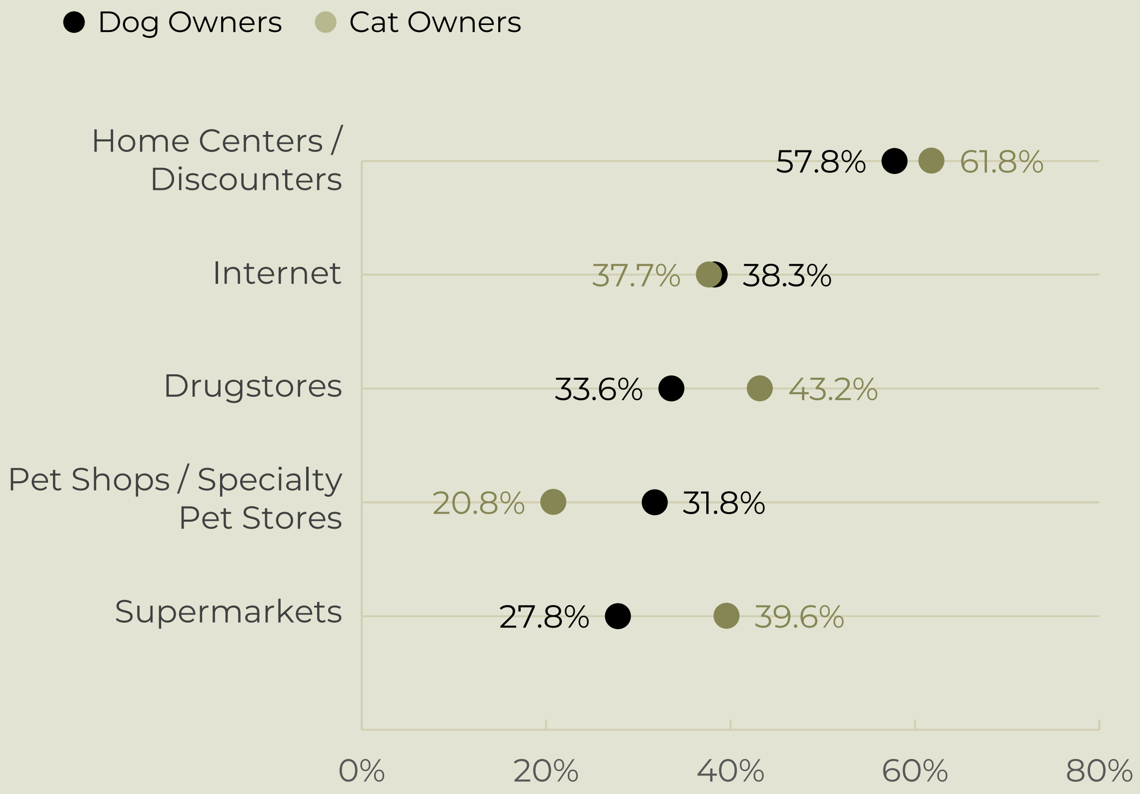
Sources: Unicharm Corporation

Based on JPY-NZD exchange rate of 1 NZD = 0.0116 JPY (2023 average)

SECTION 5

DISTRIBUTION CHANNELS

DISTRIBUTION CHANNELS (2023)
% of respondents



Home centers and discounters are the top purchase channel for pet owners in Japan.

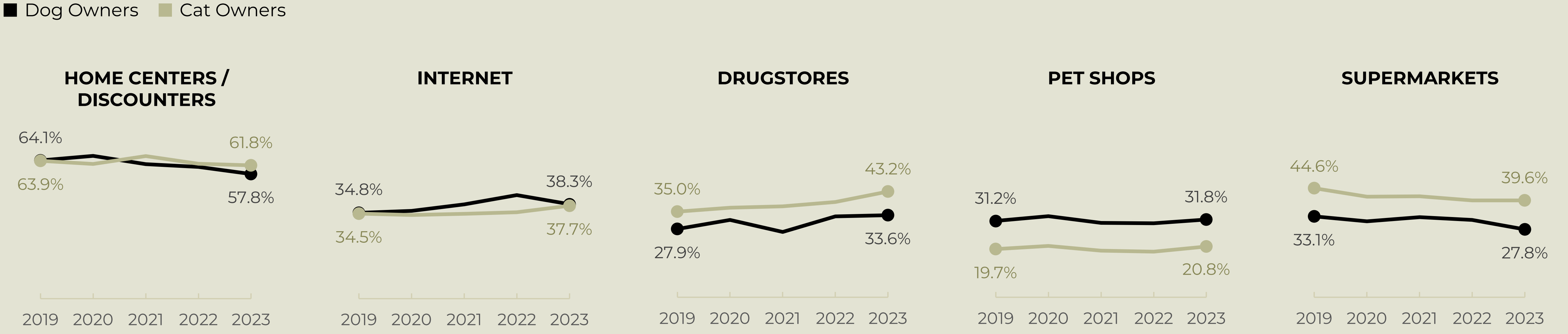
However, there are differences in where dog and cat owners shop. **Cat owners** are more likely to purchase through **drugstores** and **supermarkets**, and far less likely to purchase from supermarkets than dog owners.

Source: Japan Pet Food Association

Channel diversification is critical in Japan’s fragmented retail landscape

Japanese consumers still favour physical retail and the in-person shopping experience. E-commerce sales still lags behind other Asian markets like China and South Korea, but it is still the second most important channel for dog owners. However, it is drugstores that are seeing the fastest growth, especially among cat owners. Growth in these channels has come at the expense of supermarkets, which have been declining.

DISTRIBUTION CHANNELS
% of respondents

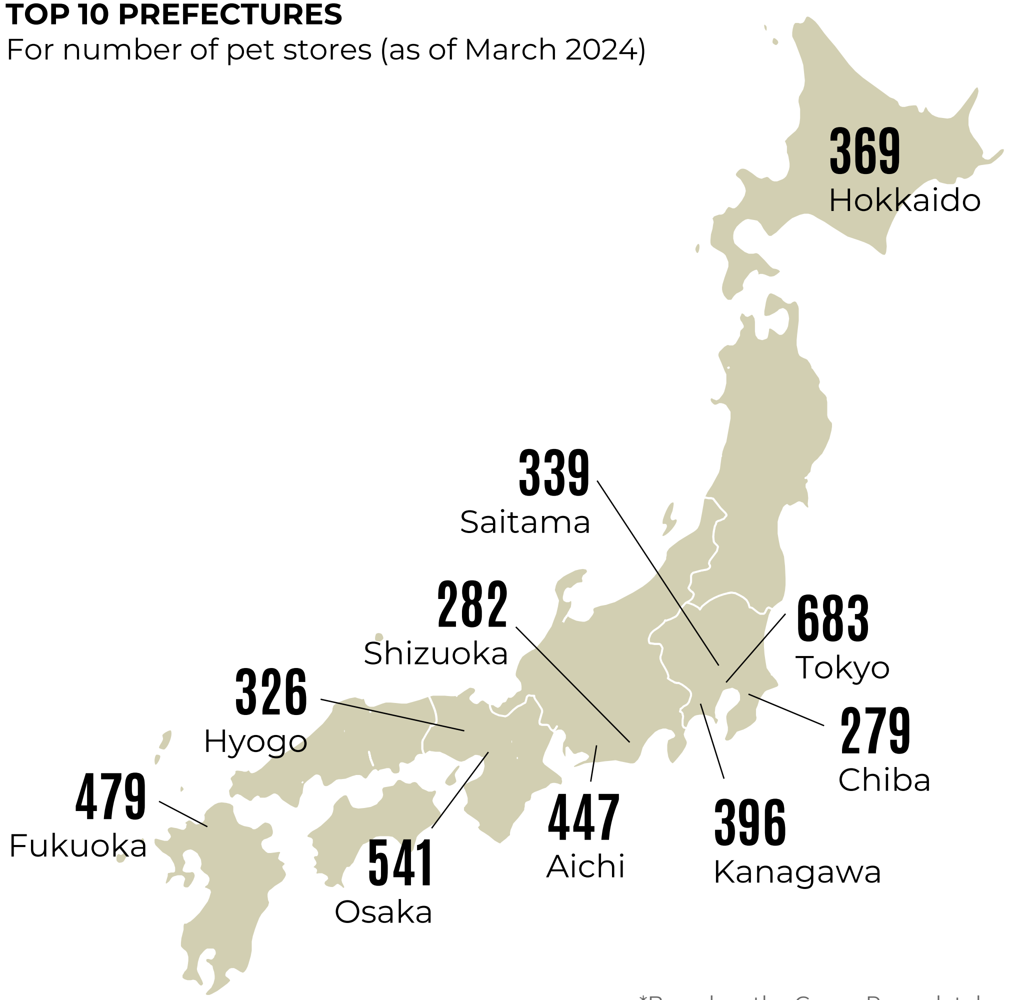


Refer to the Grocery Retailers in Japan report for an overview of supermarkets in Japan.

Source: Japan Pet Food Association

Only a handful of pet shops have nationwide coverage, while most of the pet shops in Japan operate independently

TOP 10 PREFECTURES
For number of pet stores (as of March 2024)



*Based on the Green Page database

PETEMO is the largest pet store chain in Japan. It is operated by the AEON Group, one of the largest retail corporates in the country. The chain comprises **193** pet supplies stores, 172 grooming salons, 155 pet hotels, and 53 veterinary hospitals and animal medical centers. It has 191,000 Aeon Pet WAON members.

Pet Plus has 132 stores nationwide. While the stores sell pet supplies, it places more emphasis on the sale of pets and its breeder program.

Pet's First was established in 2018 and currently has 79 stores across Japan, but mainly focuses on the Kanto and Kinki regions.

Amigo has 82 stores nationwide, but has a stronger presence in the Kinki, Chugoku/Shikoku, and Tohoku regions instead of the Tokyo area.

One Love operates over 180 stores in Japan.

Source: Green Page

Home centers are a key distribution channel for pet food

Home centers (or DIY stores) are a unique retail format in Japan that traditionally sell home improvement, gardening products, and pet food. These are typically large format stores located in suburban areas. Home centers have been diversifying into other product categories such as home furnishings, household goods, and even food and beverages.

HOME CENTERS

- **Cainz** 234 stores
- **Kohnan** 539 stores
- **Komeri** 1,103 stores
- **DCM Holdings**
  - **DCM** 506 stores
  - **Keiyo D2** 164 stores
- **Nafco** 360 stores
- **Home Wide** 30 stores
- **Arclands**
  - **Viva Home** 104 stores
  - **HC Musashi** 39 stores
- **Home's** 39 stores
- **Alleanza Holdings**
  - **Daiyu8** 70 stores
  - **Time** 20 stores
  - **Valor Home Center** 48 stores
- **Joyful Honda** 17 stores
- **Royal Home Center** 63 stores

Sources: Company websites

Notes: The retail landscape in Japan is highly fragmented. This list is not exhaustive, and is intended to be a starting point for NZ companies looking to export to Japan.

Drugstores are the second most important channel for cat owners

Drugstores in Japan, particularly the larger chains such as Welcia and Matsumoto Kiyoshi, sell a wide range of products beyond medicine, personal and skin care. Daily necessities, pet food, and food items can be found at these stores as well.

DRUGSTORES

- **AEON Group**
  - **Welcia** **2,003** stores
  - **Aoki** **923** stores
- **Tsuruha** **1,416** stores
- MatsukiyoCocokara & Co. — Matsumoto Kiyoshi and Cocokara Fine merged in October 2021 to form MatsukiyoCocokara & Co., with a combined store count of **3,431**.
  - **Matsumoto Kiyoshi** **1,878** stores
  - **Cocokara Fine** **1,553** stores
- **Drug Cosmos** **1,479** stores
- **Sugi Pharmacy** **1,690** stores
- **Sundrug** **1,116** stores
- **AIN Group**
  - **Ain Pharmacy** **1,221** stores
- **Create SDS**
  - **Create** **717** stores
- **Fuji Pharmaceutical** has 1,365 drugstores and pharmacies under the group.
  - **Seims**

Source: Retailer and company websites

Notes: The retail landscape in Japan is highly fragmented. This list is not exhaustive, and is intended to be a starting point for NZ companies looking to export to Japan.

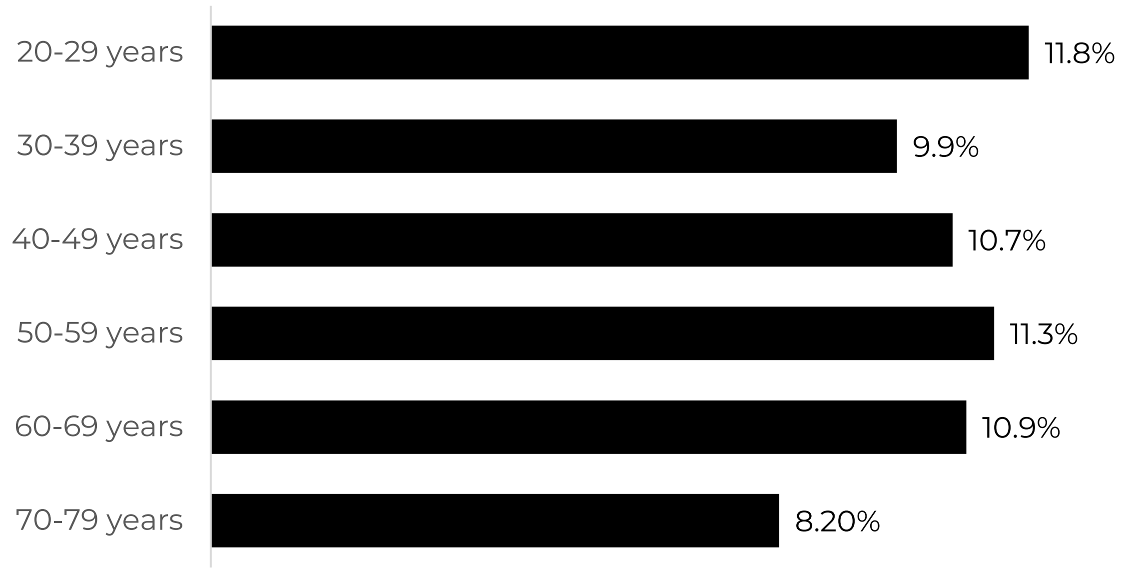
SECTION 6

PET OWNERS

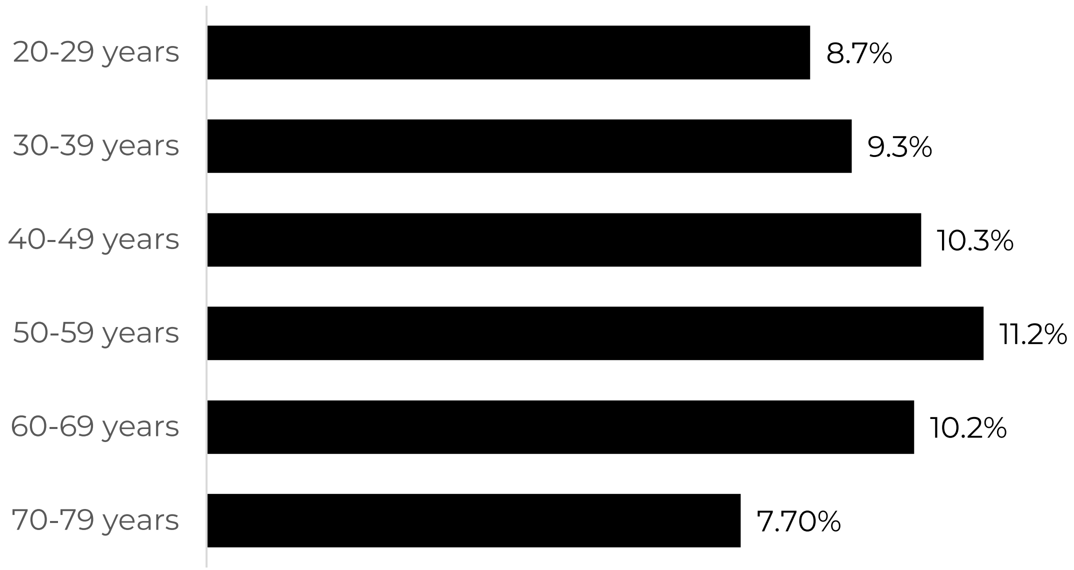
Age of dog and cat owners

A higher percentage of young people in their twenties are more likely to own dogs than cats. 11.8% of surveyed respondents in their twenties owned dogs, compared to only 8.7% who owned cats. Apart from this, there are no other significant differences in ownership patterns for different age groups.

AGE OF DOG OWNERS
% of age group that owns dogs



AGE OF CAT OWNERS
% of age group that owns cats



Source: Japan Pet Food Association

Monthly expenditure on commercial dog food and treats

The median monthly spend for dog owners on commercial dog food is approximately NZD 33 per month, compared to NZD22 for cat owners. Spend on dog and cat treats is similar, at around NZD 11 per month.

MONTHLY EXPENDITURE BY DOG OWNERS
In Japanese yen

	Mean	Median
Commercial dog food	JPY 3,618 (~NZD 40.00)	JPY 3,000 (~NZD 32.90)
Commercial dog treats	JPY 1,748 (~NZD 19.20)	JPY 1,000 (~NZD 11.00)

MONTHLY EXPENDITURE ON COMMERCIAL DOG FOOD
In Japanese yen

MONTHLY EXPENDITURE BY CAT OWNERS
In Japanese yen

	Mean	Median
Commercial cat food	JPY 2,988 (~NZD 32.80)	JPY 2,000 (~NZD 22.00)
Commercial cat treats	JPY 1,562 (~NZD 17.10)	JPY 1,000 (~NZD 11.00)

Source: Japan Pet Food Association
Note: The average spend reported on this page is specific to respondents who own a single dog or cat. Data for respondents owning multiple pets has been excluded.

Detailed monthly expenditure on commercial food and treats

The median monthly spend for dog owners on commercial dog food is approximately NZD 33 per month, compared to NZD22 for cat owners. Spend on dog and cat treats is similar, at around NZD 11 per month.

MONTHLY EXPENDITURE ON COMMERCIAL DOG FOOD AND TREATS
% of respondents

JPY	1 – 500	501 – 1,000	1,001 – 1,500	1,501 – 2,000	2,001 – 2,500	2,501 – 3,000	3,001 – 3,500	3,501 – 4,000	4,001 – 4,500	4,501 – 5,000	5,001 – 10,000	10,000 – 15,000	15,001 – 20,000	Above 20,001
Dog food	2.8%	13.0%	7.6%	18.6%	2.4%	18.3%	1.6%	6.5%	0.5%	14.1%	12.1%	1.4%	1.1%	0.0%
Dog treats	25.7%	34.1%	5.6%	15.5%	0.4%	8.4%	0.7%	1.8%	0.0%	4.6%	2.4%	0.3%	0.3%	0.1%

MONTHLY EXPENDITURE ON COMMERCIAL CAT FOOD AND TREATS
% of respondents

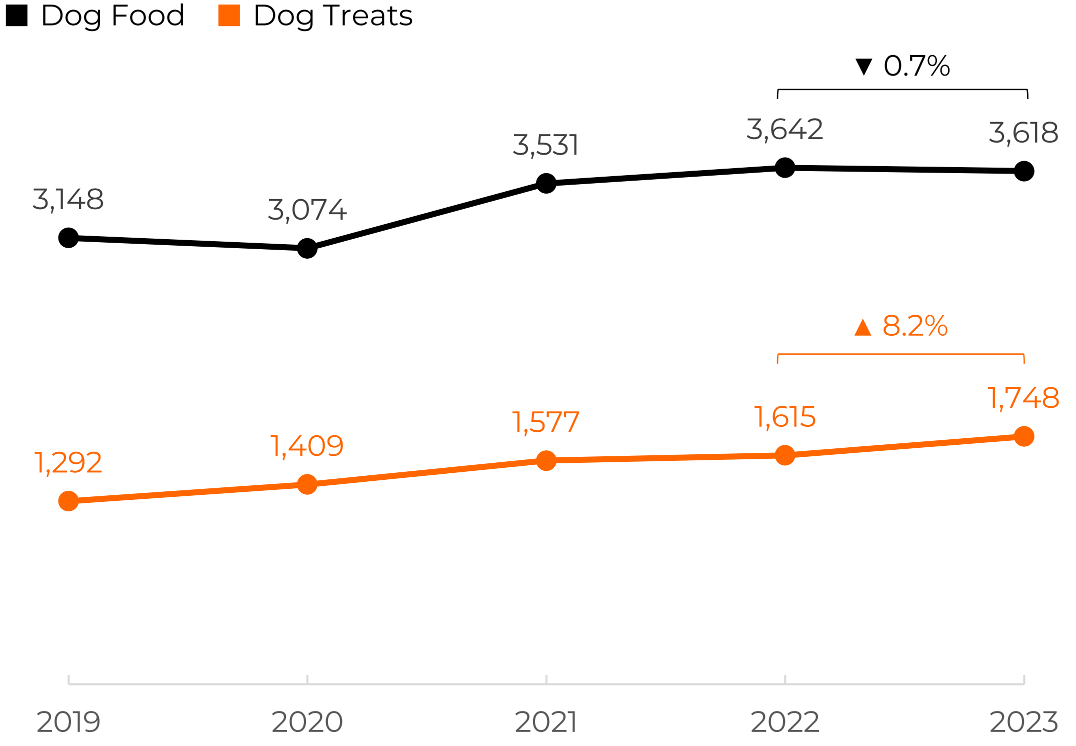
JPY	1 – 500	501 – 1,000	1,001 – 1,500	1,501 – 2,000	2,001 – 2,500	2,501 – 3,000	3,001 – 3,500	3,501 – 4,000	4,001 – 4,500	4,501 – 5,000	5,001 – 10,000	10,000 – 15,000	15,001 – 20,000	Above 20,001
Cat food	2.4%	18.7%	9.9%	21.1%	3.7%	18.1%	1.5%	7.3%	0.2%	7.1%	9.0%	0.6%	0.4%	0.0%
Cat treats	27.5%	34.4%	5.5%	16.5%	0.9%	7.5%	0.3%	1.4%	0.0%	2.9%	3.2%	0.0%	0.0%	0.0%

Source: Japan Pet Food Association
Note: The average spend reported on this page is specific to respondents who own a single dog or cat. Data for respondents owning multiple pets has been excluded.

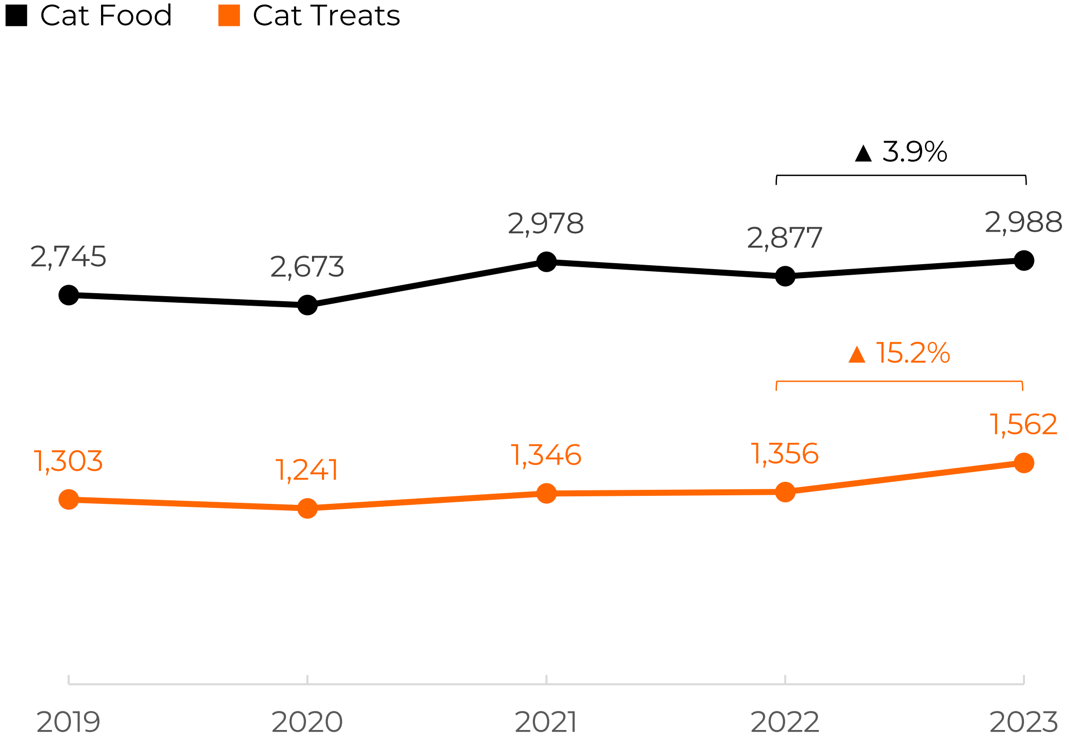
Monthly expenditure by dog and cat owners over time

Spend on commercial dog food declined by 0.7% in 2023, but spend on dog treats recorded healthy growth. Cat treats recorded the highest growth of 15.2% in 2023.

MONTHLY EXPENDITURE BY DOG OWNERS
In Japanese yen



MONTHLY EXPENDITURE BY CAT OWNERS
In Japanese yen

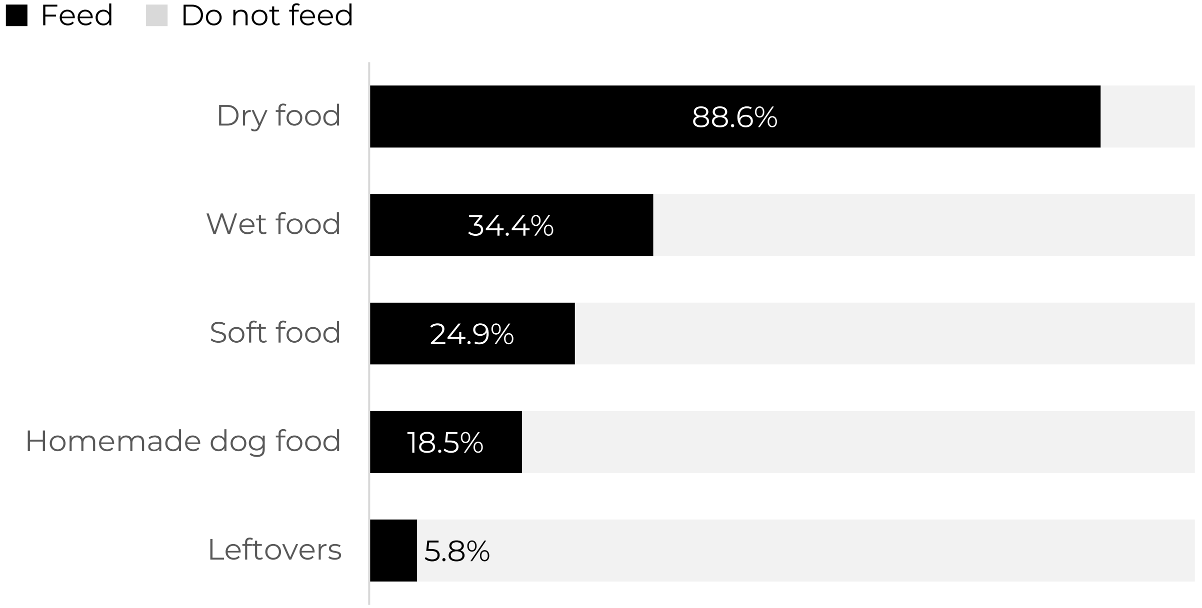


Source: Japan Pet Food Association
Note: The average spend reported on this page is specific to respondents who own a single dog or cat. Data for respondents owning multiple pets has been excluded.

What type of food are dog owners feeding?

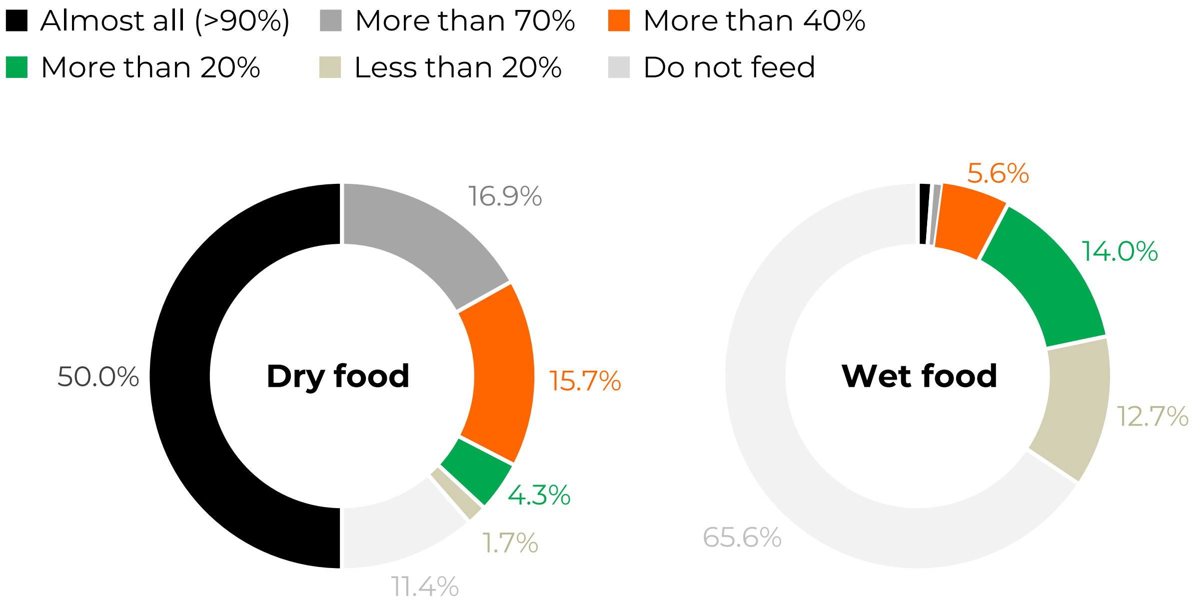
Most dog owners mainly feed dry dog food. A third of dog owners also purchase wet food for their dogs, as a topper or mixer, as wet food tends to make up less than 40% of the meal. A quarter of dog owners also purchase soft food, which has a higher moisture content, and some dog owners prepare home cooked meals for their dogs.

TYPES OF FOOD USED
% of respondents



*Soft dog food refers to dog food that has a higher moisture content of about 25% to 35%, compared to 10% or less for dry food. Alternatively, some types of soft food may incorporate air bubbles into the dry food to make it softer.

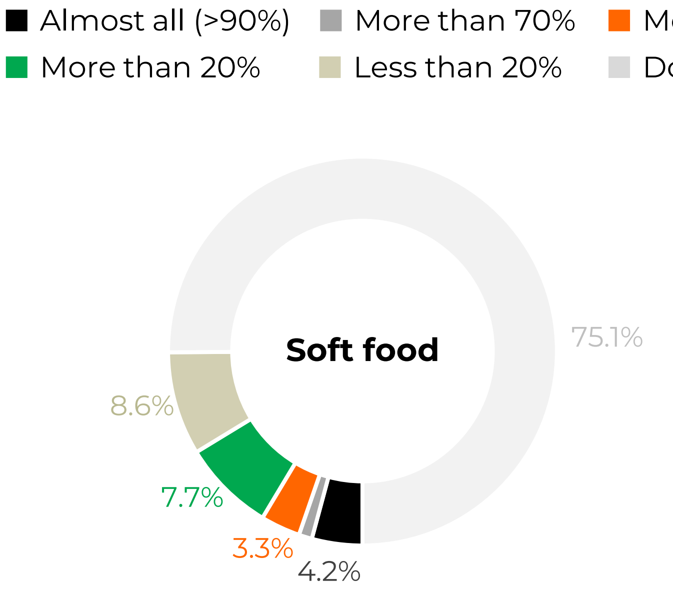
COMPOSITION OF MEAL
% of meal



What type of food are dog owners feeding?

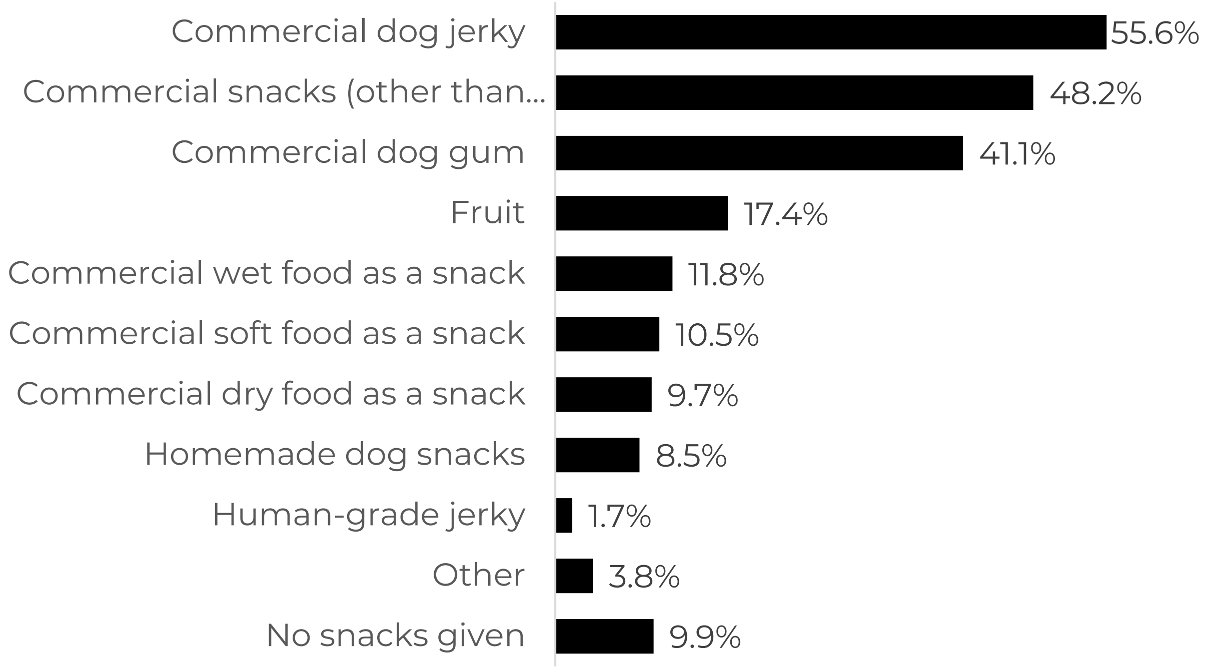
Soft dog food is rarely used as a main meal – soft dog food makes up only a small portion of each meal among those who purchase this format. For dog treats, commercial dog jerky is the most popular, followed by other types of commercial snacks. Dog gum (edible chews such as deer antlers, dental chews, etc.) are also popular.

COMPOSITION OF MEAL
% of meal



*Soft dog food refers to dog food that has a higher moisture content of about 25% to 35%, compared to 10% or less for dry food. Alternatively, some types of soft food may incorporate air bubbles into the dry food to make it softer.

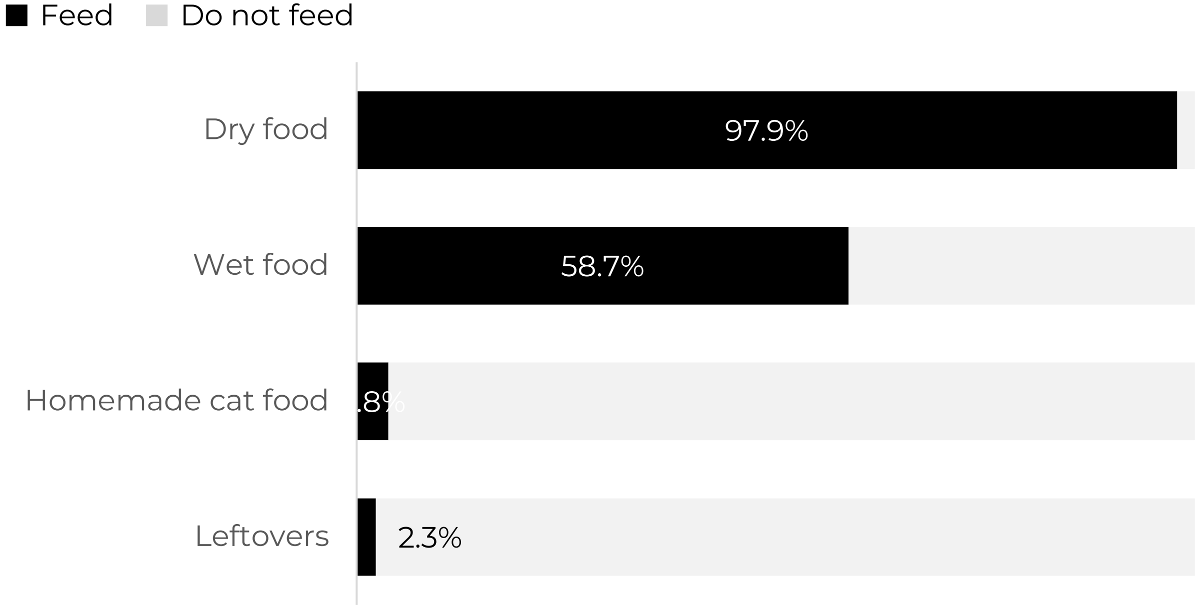
TYPES OF TREATS FED TO DOGS
% of respondents



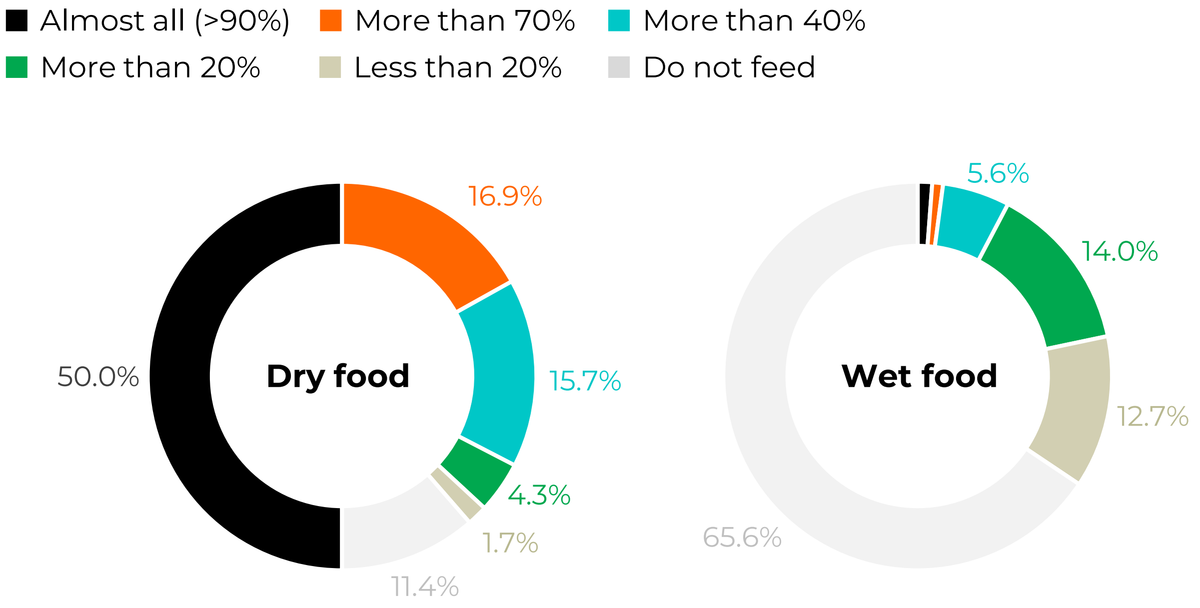
What are cat owners feeding?

Close to 60% of cat owners purchase wet cat food, but it is often used as a topper or mixer that makes up less than half of the meal. 50% of cat owners exclusively feed dry cat food.

TYPES OF FOOD USED
% of respondents



COMPOSITION OF MEAL
% of meal

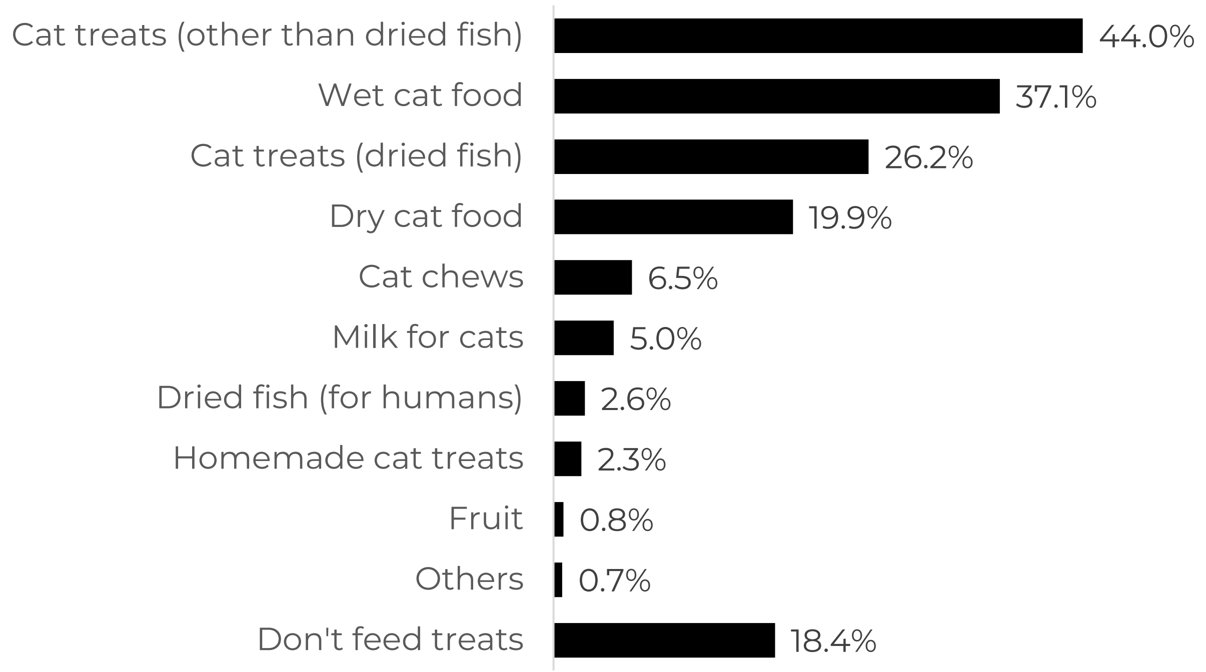


Source: Japan Pet Food Association

What are cat owners feeding?

Commercial cat treats and dried fish are very popular as cat treats, but many cat owners use wet and dry cat food as a snack as well. Treating is far less frequent among cat owners, with close to a fifth of cat owners saying that they do not feed treats, compared to less than 10% for dog owners.

TYPES OF TREATS FED TO CATS
% of respondents



Source: Japan Pet Food Association