



Euromonitor
International

Pet Care in Indonesia

June 2025

Table of Contents

EXECUTIVE SUMMARY

Pet care in 2025: The big picture
2025 key trends
Competitive landscape
Retail developments
What next for pet care?

MARKET INDICATORS

Table 1 - Pet Populations 2020-2025

MARKET DATA

- Table 2 - Sales of Pet Food by Category: Volume 2020-2025
- Table 3 - Sales of Pet Care by Category: Value 2020-2025
- Table 4 - Sales of Pet Food by Category: % Volume Growth 2020-2025
- Table 5 - Sales of Pet Care by Category: % Value Growth 2020-2025
- Table 6 - NBO Company Shares of Pet Food: % Value 2020-2024
- Table 7 - LBN Brand Shares of Pet Food: % Value 2021-2024
- Table 8 - NBO Company Shares of Dog and Cat Food: % Value 2020-2024
- Table 9 - LBN Brand Shares of Dog and Cat Food: % Value 2021-2024
- Table 10 - Penetration of Private Label in Pet Care by Category: % Value 2020-2025
- Table 11 - Distribution of Pet Care by Format: % Value 2020-2025
- Table 12 - Distribution of Pet Care by Format and Category: % Value 2025
- Table 13 - Distribution of Dog and Cat Food by Format: % Value 2020-2025
- Table 14 - Distribution of Dog and Cat Food by Format and Category: % Value 2025
- Table 15 - Forecast Sales of Pet Food by Category: Volume 2025-2030
- Table 16 - Forecast Sales of Pet Care by Category: Value 2025-2030
- Table 17 - Forecast Sales of Pet Food by Category: % Volume Growth 2025-2030
- Table 18 - Forecast Sales of Pet Care by Category: % Value Growth 2025-2030

DISCLAIMER

SOURCES

Summary 1 - Research Sources

KEY DATA FINDINGS

2025 DEVELOPMENTS

Cat food records slowed growth in 2025
Central Proteinaprima maintains lead through affordability
Pet shops and superstores remains largest sales contributor in 2025

PROSPECTS AND OPPORTUNITIES

Future growth propelled by adoption among Gen-Zs and uptick in stray feeding
Retail e-commerce will expand through variety, while polarisation is likely to set in
Rising demand for functional and fortified cat food options
Summary 2 - Cat Food by Price Band 2025

CATEGORY INDICATORS

- Table 19 - Cat Owning Households: % Analysis 2020-2025
- Table 20 - Cat Population 2020-2025

Table 21 - Consumption of Cat Food by Prepared vs Non-prepared: % Analysis 2020-2025

CATEGORY DATA

- Table 22 - Sales of Cat Food by Category: Volume 2020-2025
- Table 23 - Sales of Cat Food by Category: Value 2020-2025
- Table 24 - Sales of Cat Food by Category: % Volume Growth 2020-2025
- Table 25 - Sales of Cat Food by Category: % Value Growth 2020-2025
- Table 26 - Sales of Dry Cat Food by Life-Cycle: % Value 2020-2025
- Table 27 - Sales of Wet Cat Food by Life-Cycle: % Value 2020-2025
- Table 28 - NBO Company Shares of Cat Food: % Value 2020-2024
- Table 29 - LBN Brand Shares of Cat Food: % Value 2021-2024
- Table 30 - LBN Brand Shares of Cat Treats and Mixers: % Value 2021-2024
- Table 31 - Distribution of Cat Food by Format: % Value 2020-2025
- Table 32 - Forecast Sales of Cat Food by Category: Volume 2025-2030
- Table 33 - Forecast Sales of Cat Food by Category: Value 2025-2030
- Table 34 - Forecast Sales of Cat Food by Category: % Volume Growth 2025-2030
- Table 35 - Forecast Sales of Cat Food by Category: % Value Growth 2025-2030

Dog Food in Indonesia

KEY DATA FINDINGS

2025 DEVELOPMENTS

- More modest retail growth seen for dog food in 2025
- Central Proteinaprima and Mars Foods Indonesia remain on top
- Pet shops and retail e-commerce as favoured distribution channels

PROSPECTS AND OPPORTUNITIES

- Positive value sales forecast, driven by dog adoption
- Omnichannel strategies to help support value sales
- Innovation in nutrition and human-esque variants
- Summary 3 - Dog Food by Price Band 2025

CATEGORY INDICATORS

- Table 36 - Dog Owning Households: % Analysis 2020-2025
- Table 37 - Dog Population 2020-2025
- Table 38 - Consumption of Dog Food by Prepared vs Non-prepared: % Analysis 2020-2025

CATEGORY DATA

- Table 39 - Sales of Dog Food by Category: Volume 2020-2025
- Table 40 - Sales of Dog Food by Category: Value 2020-2025
- Table 41 - Sales of Dog Food by Category: % Volume Growth 2020-2025
- Table 42 - Sales of Dog Food by Category: % Value Growth 2020-2025
- Table 43 - Sales of Dry Dog Food by Life-Cycle: % Value 2020-2025
- Table 44 - Sales of Wet Dog Food by Life-Cycle: % Value 2020-2025
- Table 45 - NBO Company Shares of Dog Food: % Value 2020-2024
- Table 46 - LBN Brand Shares of Dog Food: % Value 2021-2024
- Table 47 - LBN Brand Shares of Dog Treats and Mixers: % Value 2021-2024
- Table 48 - Distribution of Dog Food by Format: % Value 2020-2025
- Table 49 - Forecast Sales of Dog Food by Category: Volume 2025-2030
- Table 50 - Forecast Sales of Dog Food by Category: Value 2025-2030
- Table 51 - Forecast Sales of Dog Food by Category: % Volume Growth 2025-2030
- Table 52 - Forecast Sales of Dog Food by Category: % Value Growth 2025-2030

Other Pet Food in Indonesia

KEY DATA FINDINGS

2025 DEVELOPMENTS

Unit prices remain stable though relatively high in other pet food in 2025

Central Proteinaprima as continued leader

Specialist pet shops key channel for other pet food sales

PROSPECTS AND OPPORTUNITIES

Volume sales will be low throughout forecast period

E-commerce growth to have only limited impact on other pet food sales in Indonesia

Constrained innovation category-wide, while fish fans will keep fish food strong

CATEGORY INDICATORS

Table 53 - Other Pet Population 2020-2025

CATEGORY DATA

Table 54 - Sales of Other Pet Food by Category: Volume 2020-2025

Table 55 - Sales of Other Pet Food by Category: Value 2020-2025

Table 56 - Sales of Other Pet Food by Category: % Volume Growth 2020-2025

Table 57 - Sales of Other Pet Food by Category: % Value Growth 2020-2025

Table 58 - LBN Brand Shares of Bird Food: % Value 2021-2024

Table 59 - LBN Brand Shares of Fish Food: % Value 2021-2024

Table 60 - LBN Brand Shares of Small Mammal/Reptile Food: % Value 2021-2024

Table 61 - Distribution of Other Pet Food by Format: % Value 2020-2025

Table 62 - Forecast Sales of Other Pet Food by Category: Volume 2025-2030

Table 63 - Forecast Sales of Other Pet Food by Category: Value 2025-2030

Table 64 - Forecast Sales of Other Pet Food by Category: % Volume Growth 2025-2030

Table 65 - Forecast Sales of Other Pet Food by Category: % Value Growth 2025-2030

Pet Products in Indonesia

KEY DATA FINDINGS

2025 DEVELOPMENTS

Steady growth continues for pet products in 2025

Competitive landscape remains highly fragmented

Pet shops and superstores leads distribution as e-commerce continues to rise

PROSPECTS AND OPPORTUNITIES

Further growth forecast for pet products in Indonesia

Retail e-commerce will remain stable though face increased competition, while expanding pet-friendly locations support sales in pet grooming products

Innovation to be driven by affordable convenience

CATEGORY DATA

Table 66 - Sales of Pet Products by Category: Value 2020-2025

Table 67 - Sales of Pet Products by Category: % Value Growth 2020-2025

Table 68 - Sales of Pet Healthcare by Type: % Value 2020-2025

Table 69 - Sales of Other Pet Products by Type: % Value 2020-2025

Table 70 - NBO Company Shares of Pet Products: % Value 2020-2024

Table 71 - LBN Brand Shares of Pet Products: % Value 2021-2024

Table 72 - Distribution of Pet Products by Format: % Value 2020-2025

Table 73 - Forecast Sales of Pet Products by Category: Value 2025-2030

About Euromonitor International

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-indonesia/report.