



# Passport

## Pet Care in Thailand

Euromonitor International  
May 2022

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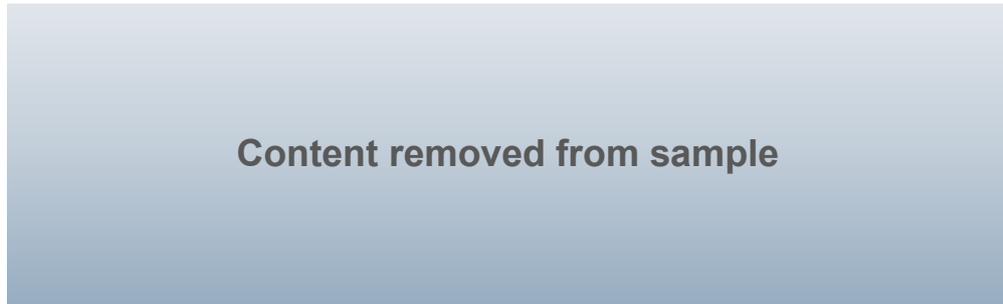
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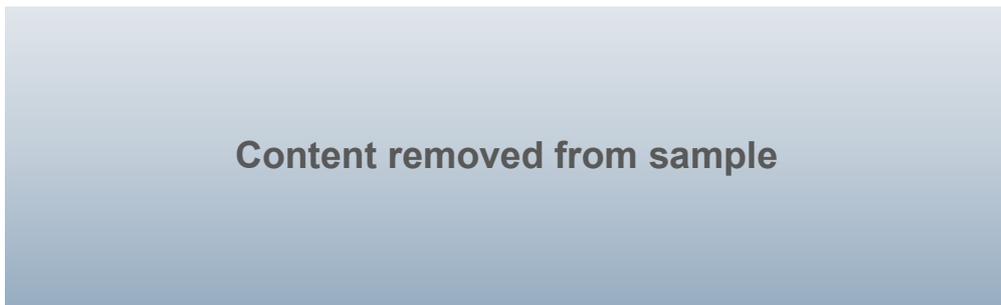
# PET CARE IN THAILAND - INDUSTRY OVERVIEW

## EXECUTIVE SUMMARY

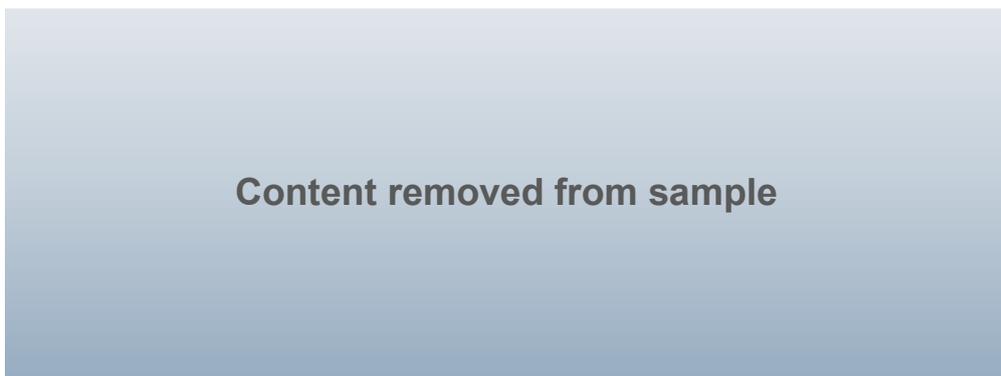
Pet care in 2022: The big picture



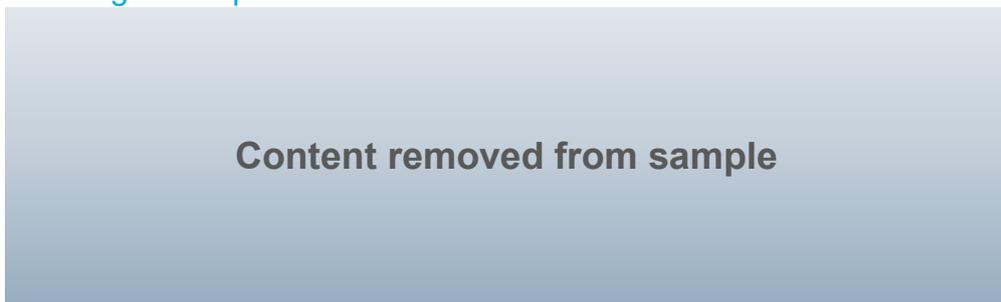
2022 key trends



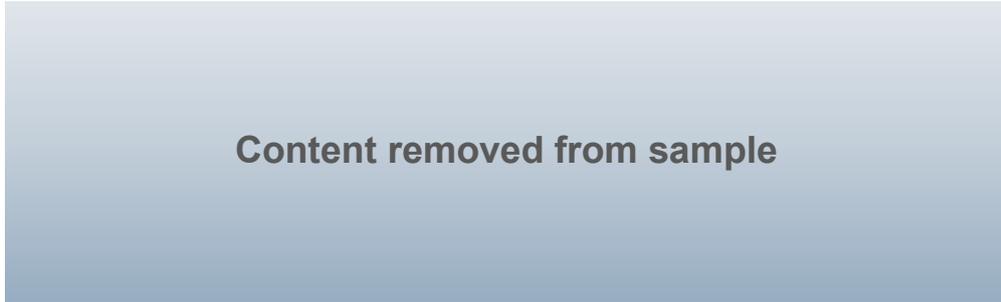
Competitive landscape



Retailing developments



### What next for pet care?



### MARKET INDICATORS

Table 1 Pet Populations 2017-2022

'000s of animals	2017	2018	2019	2020	2021	2022
Bird Population	<b>Data removed from sample</b>					
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	<b>Data removed from sample</b>					
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	<b>Data removed from sample</b>					
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

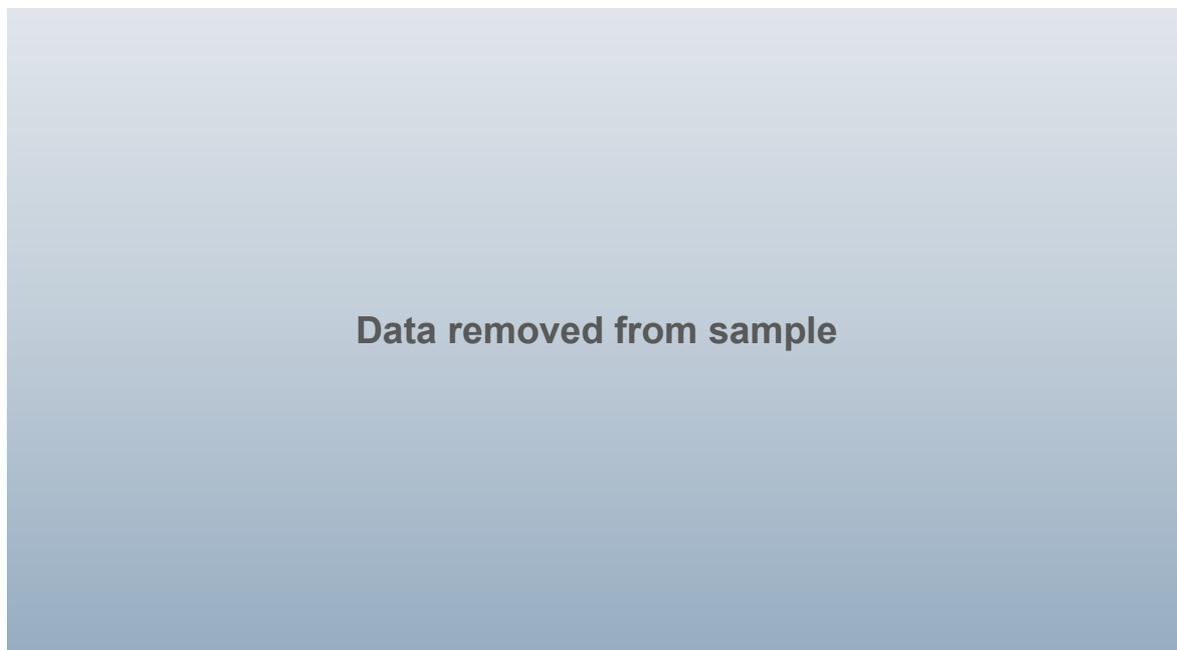
Company 2017 2018 2019 2020 2021

**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**

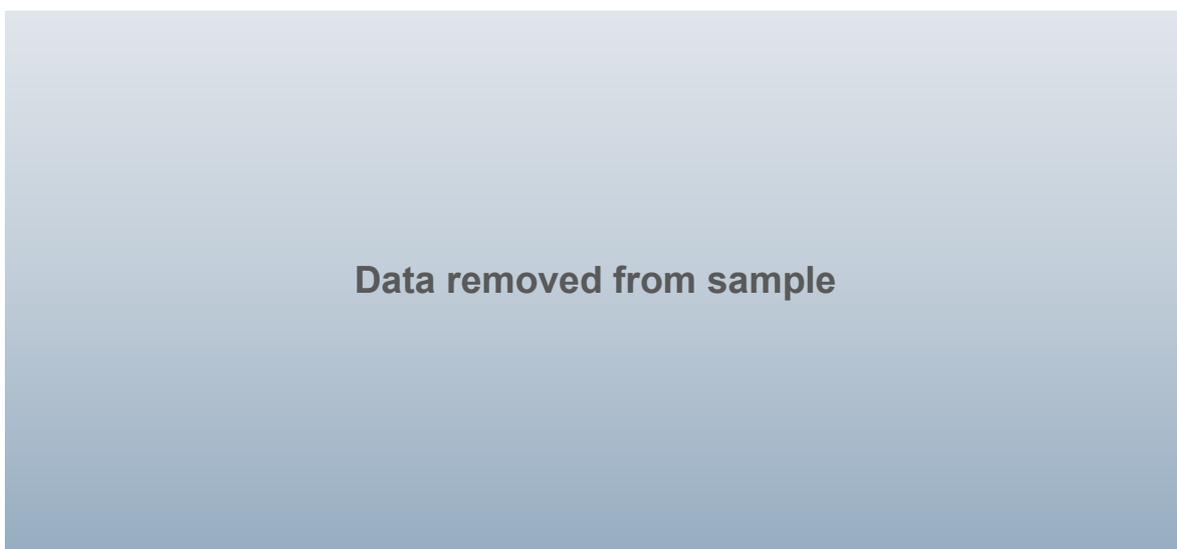
% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

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

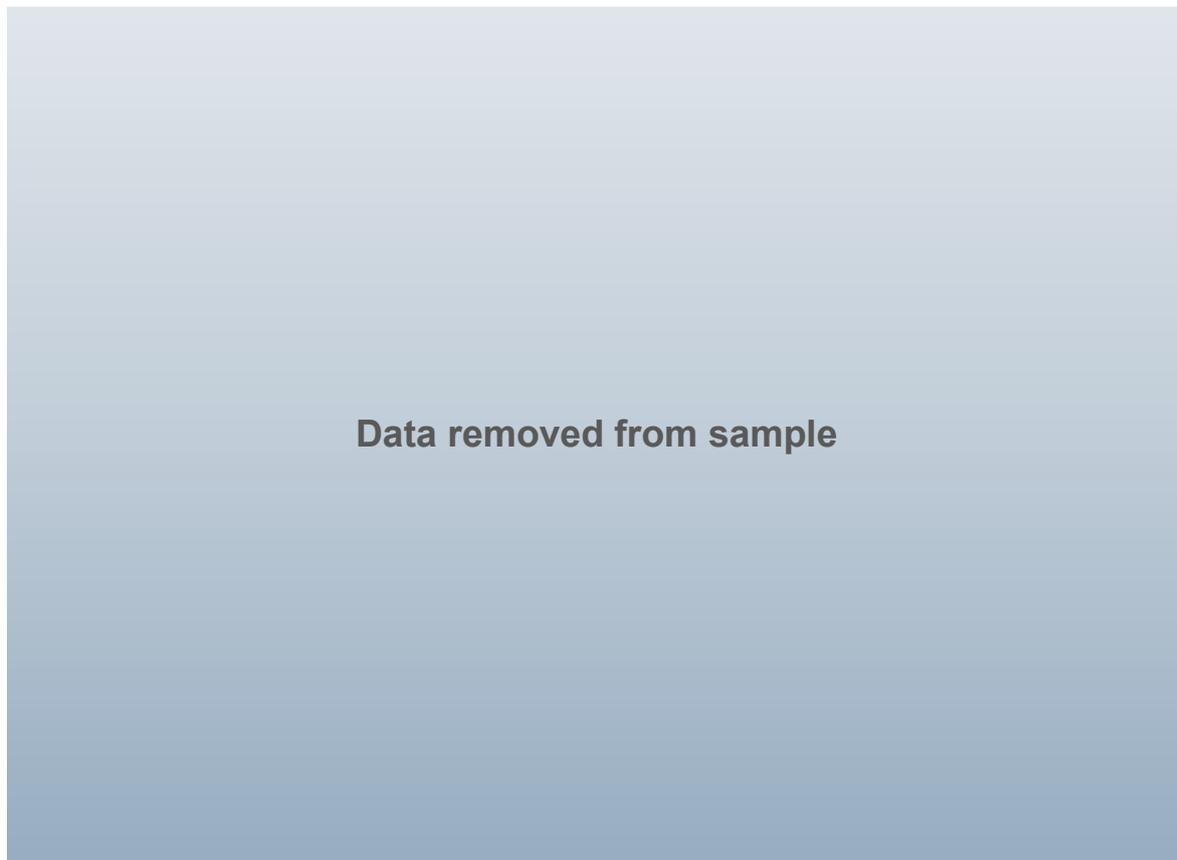
% retail value rsp Company	2017	2018	2019	2020	2021
-------------------------------	------	------	------	------	------



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
-----------------------------------	---------------	------	------	------	------



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	<b>Data removed from sample</b>					

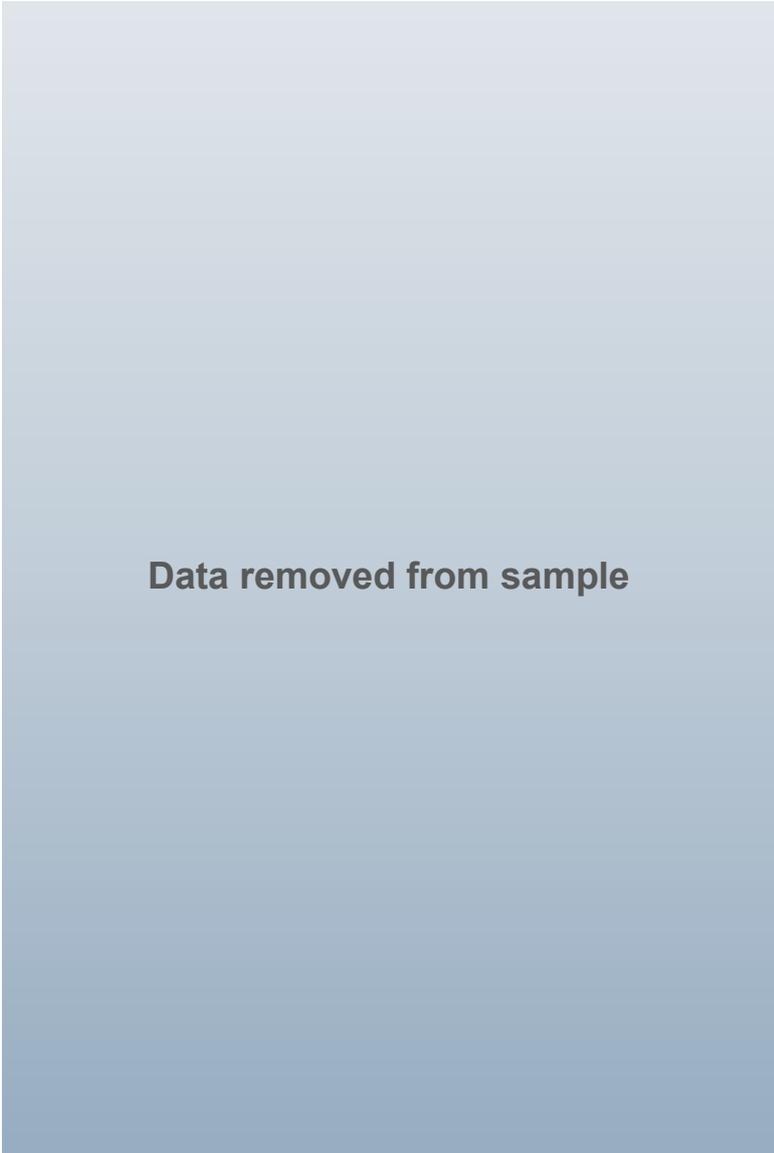
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**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



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

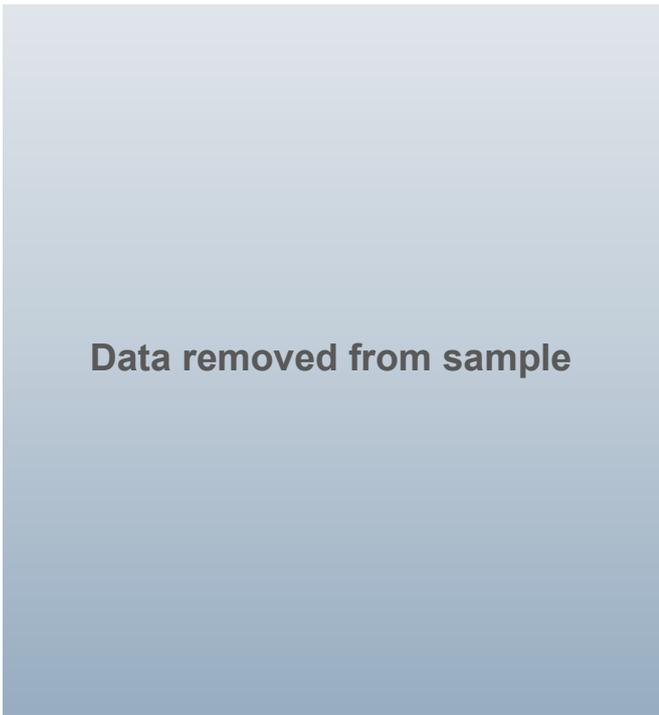
Pet Food

Pet Products

- Store-Based Retailing
- Grocery Retailers
- Modern Grocery Retailers
- Convenience Stores
- Discounters
- Forecourt Retailers



- 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



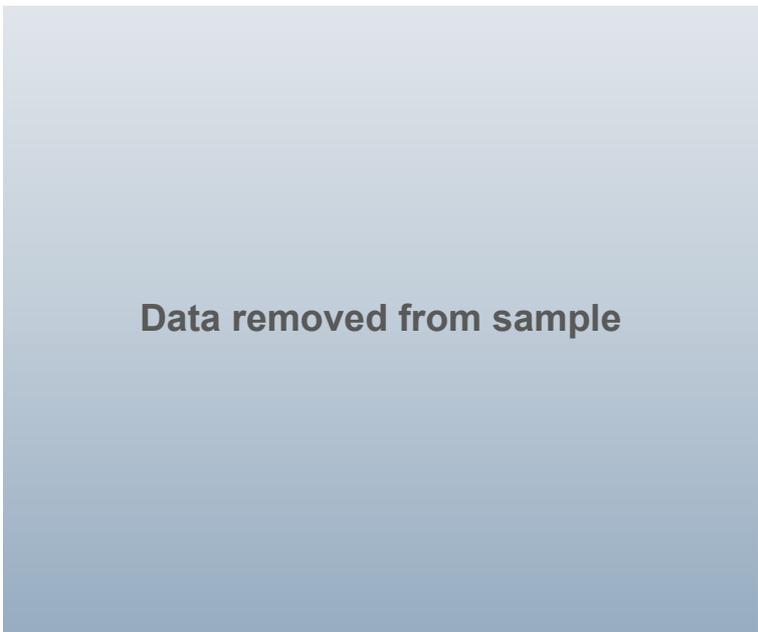
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources  
 Key: PF = pet food; PP = pet products

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

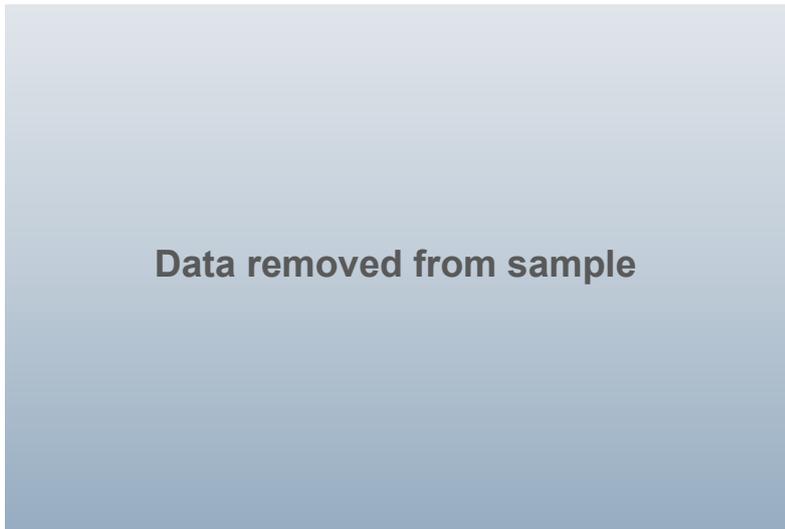
% retail value rsp

	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



- 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

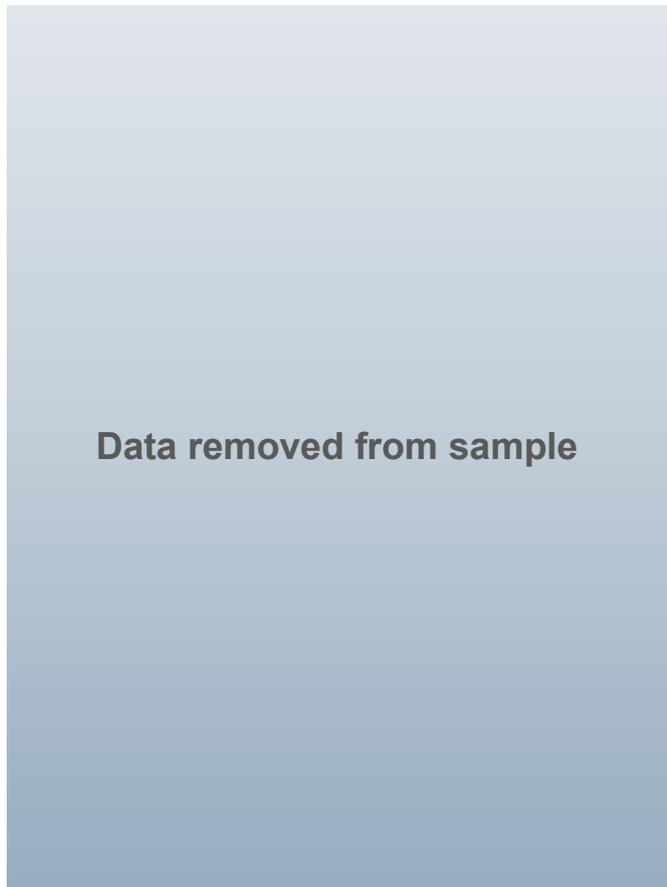
**Table 14**      Distribution of Dog and Cat Food by Format and Category: % Value 2022

% 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



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  
Other Pet Food  
Pet Food

**Data removed from sample**

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

**Data removed from sample**

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  
Other Pet Food  
Pet Food

**Data removed from sample**

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

**Data removed from sample**

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

## DISCLAIMER

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## SOURCES

Sources used during research include the following:

### Summary 1 Research Sources

Official Sources

[Redacted]

[Redacted]

Trade Associations

[Redacted]

Trade Press

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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

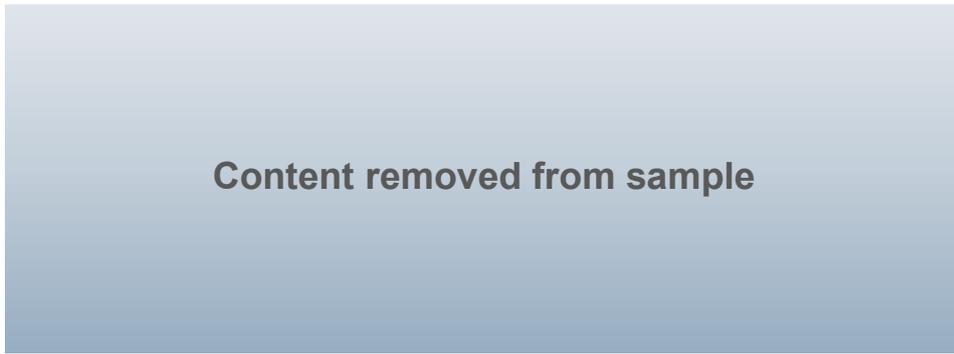
New launches likely to focus on health

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Health trend dictates innovation in cat treats

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Small brands lead innovation in wet cat food



### CATEGORY INDICATORS

**Table 19** Cat Owning Households: % Analysis 2017-2022

	2017	2018	2019	2020	2021	2022
% Households owning a cat (% households)	<b>Data removed from sample</b>					
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	<b>Data removed from sample</b>					

Source: Euromonitor International from official statistics

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

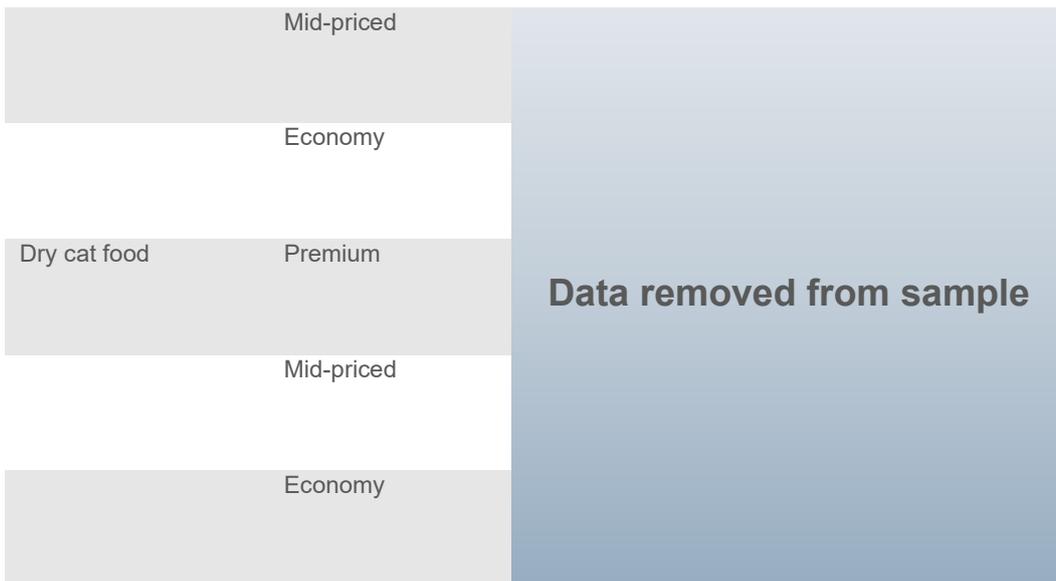
% total consumption	2017	2018	2019	2020	2021	2022
Prepared cat food	<b>Data removed from sample</b>					
Non-prepared cat food						

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						

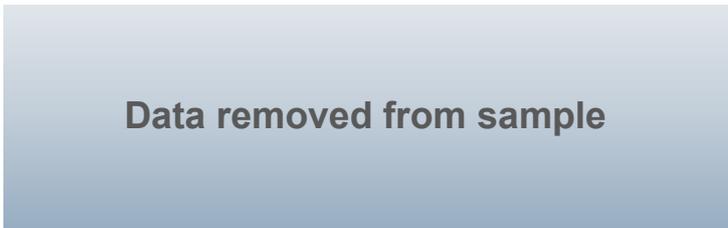
--- Premium Wet Cat Food  
 - Cat Food

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

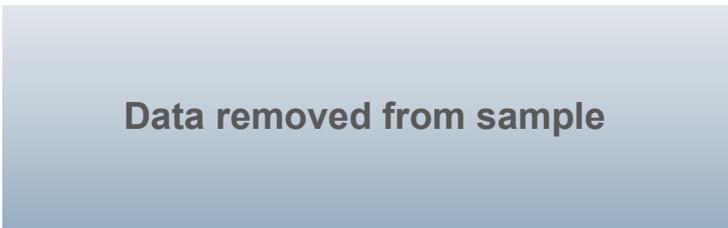


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**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



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



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
-----------------------------------	---------------	------	------	------	------

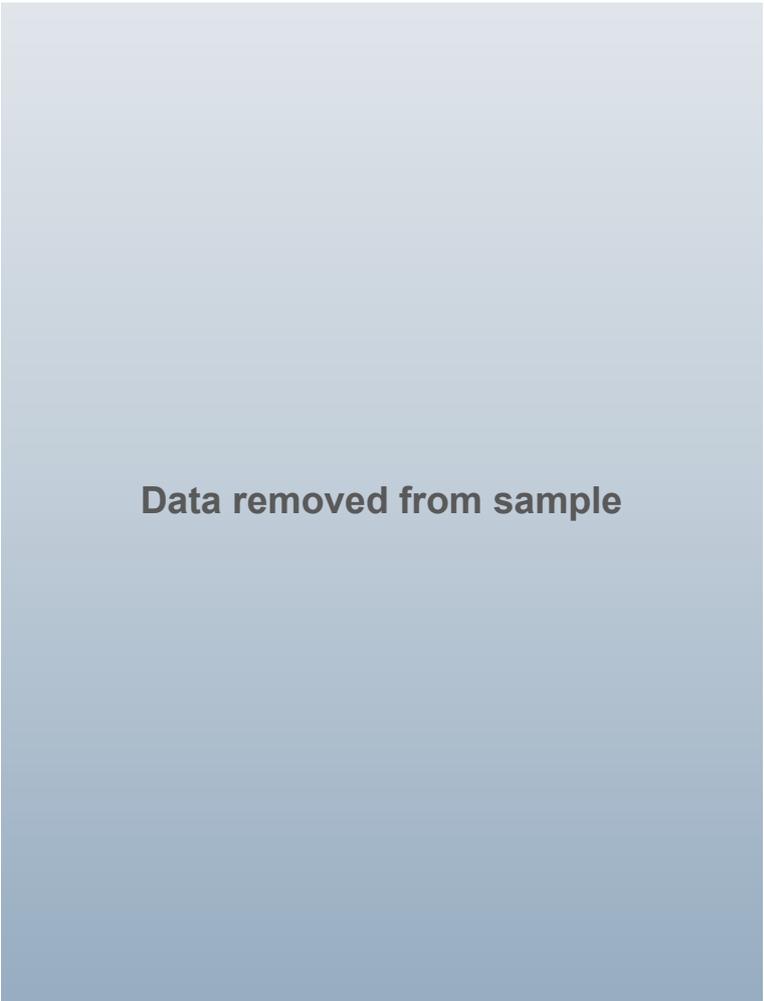


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**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



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

Tonnes	2022	2023	2024	2025	2026	2027
-- Cat Treats and Mixers	<b>Data removed from sample</b>					
-- 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

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

THB million	2022	2023	2024	2025	2026	2027
-- Cat Treats and Mixers	<b>Data removed from sample</b>					
-- 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

**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

**Data removed from sample**

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

**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

**Data removed from sample**

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

# 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

**Content removed from sample**

Global companies to remain the clear leaders

**Content removed from sample**

Local players in dog food see the highest innovation

**Content removed from sample**

## CATEGORY INDICATORS

Table 36 Dog Owning Households: % Analysis 2017-2022

	2017	2018	2019	2020	2021	2022
% Households owning a dog (% households)	<b>Data removed from sample</b>					
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)	<b>Data removed from sample</b>					
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	<b>Data removed from sample</b>					
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	<b>Data removed from sample</b>	
	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	<b>Data removed from sample</b>					
-- 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	<b>Data removed from sample</b>					
-- 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	<b>Data removed from sample</b>		
-- 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	<b>Data removed from sample</b>		
-- 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	<b>Data removed from sample</b>					
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	<b>Data removed from sample</b>					
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**

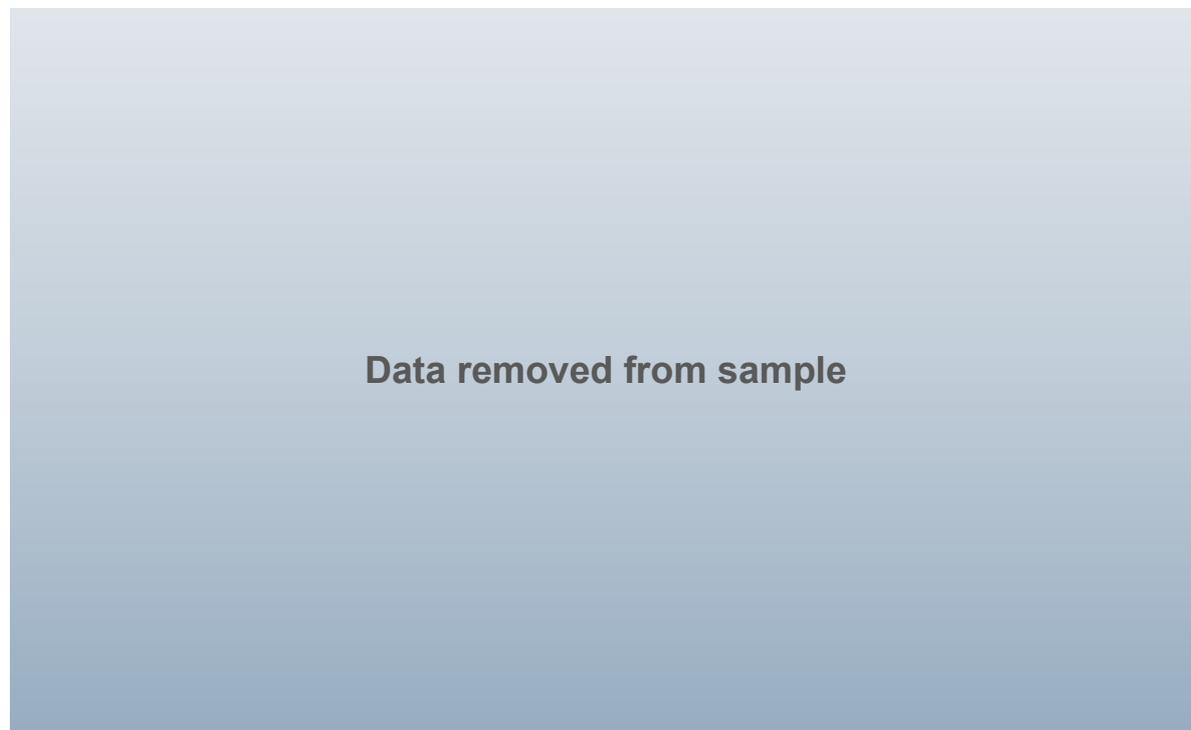
% retail value rsp	2017	2018	2019	2020	2021
--------------------	------	------	------	------	------

Company	<b>Data removed from sample</b>				
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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

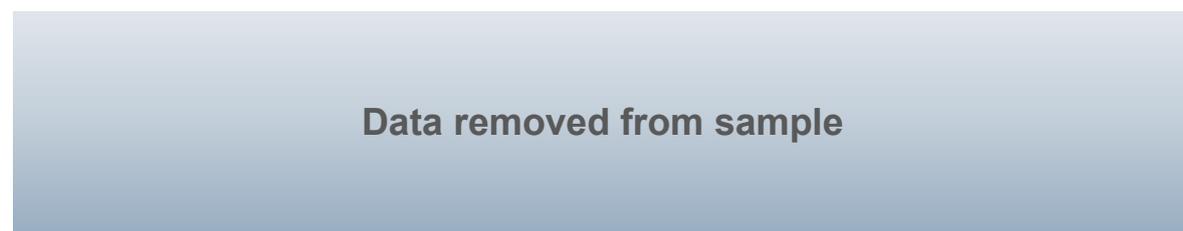
% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
-----------------------------------	---------------	------	------	------	------



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
-----------------------------------	---------------	------	------	------	------

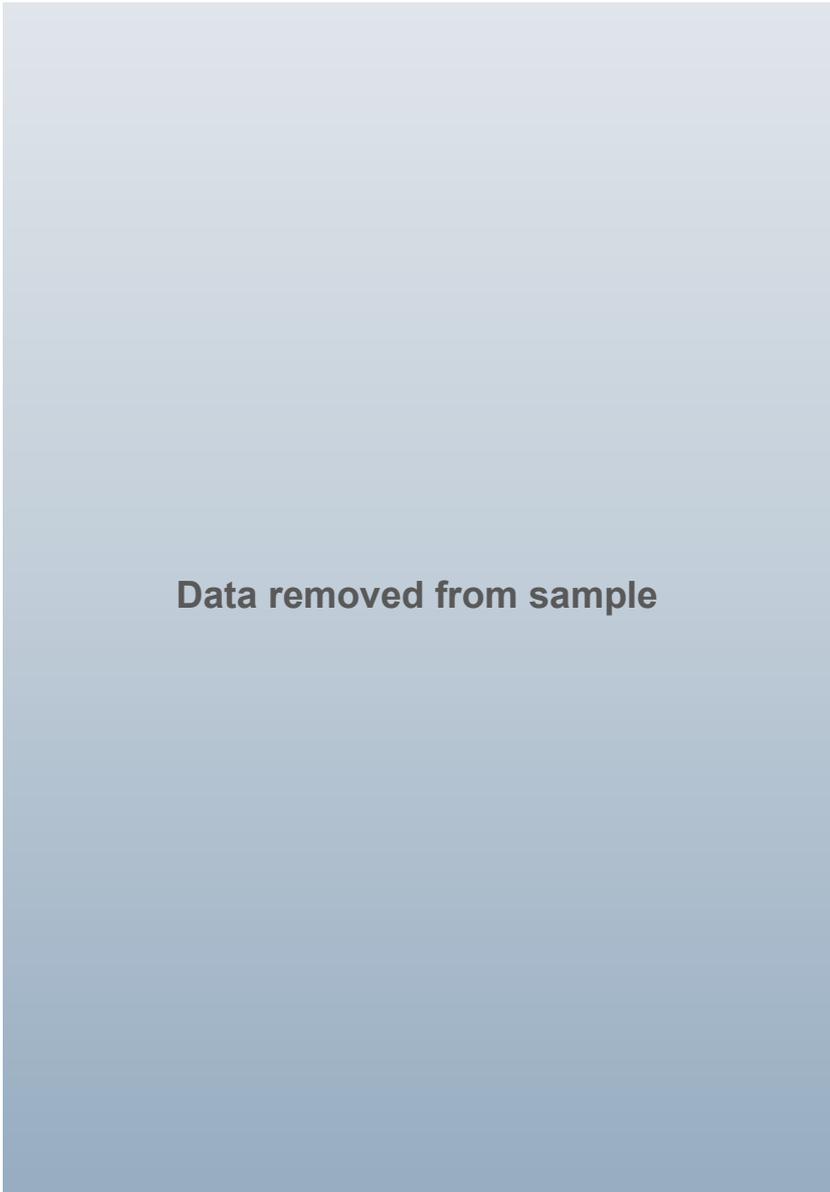


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**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



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						



--- 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 -- 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	Data removed from sample					

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 -- 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	Data removed from sample		

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 -- 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

# 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

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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

**Content removed from sample**

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	<b>Data removed from sample</b>					
Fish Population						
Reptile Population						
Small Mammal Population						
Other Pet Population						

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	<b>Data removed from sample</b>					
- Fish Food						

- 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	<b>Data removed from sample</b>					
- Fish Food						
- 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 56 Sales of Other Pet Food by Category: % Volume Growth 2017-2022**

% volume growth	2021/22	2017-22 CAGR	2017/22 Total
- Bird Food	<b>Data removed from sample</b>		
- Fish Food			
- 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 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	<b>Data removed from sample</b>		
- Fish Food			
- 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			

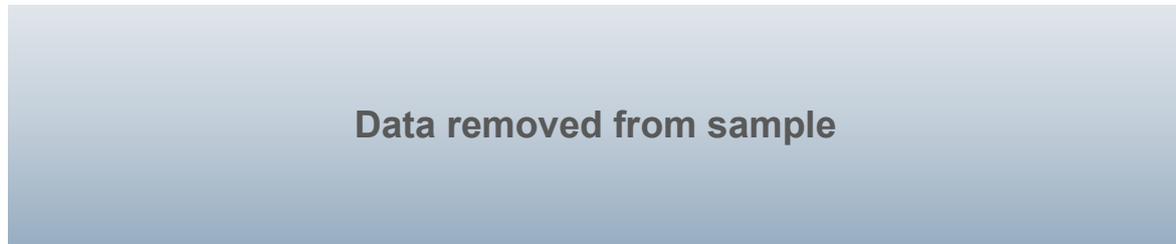
**Table 58 LBN Brand Shares of Bird Food: % Value 2018-2021**

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

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

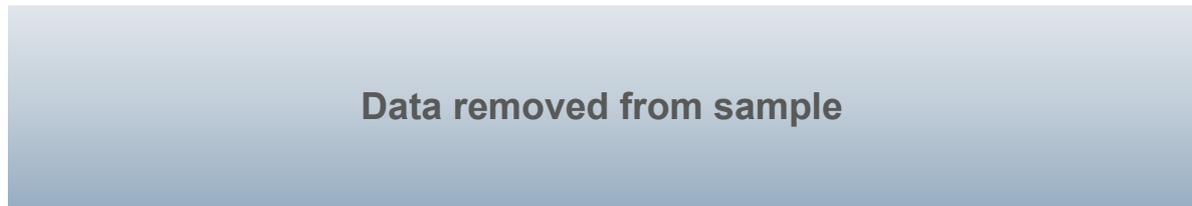
% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
-----------------------------------	---------------	------	------	------	------



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
-----------------------------------	---------------	------	------	------	------

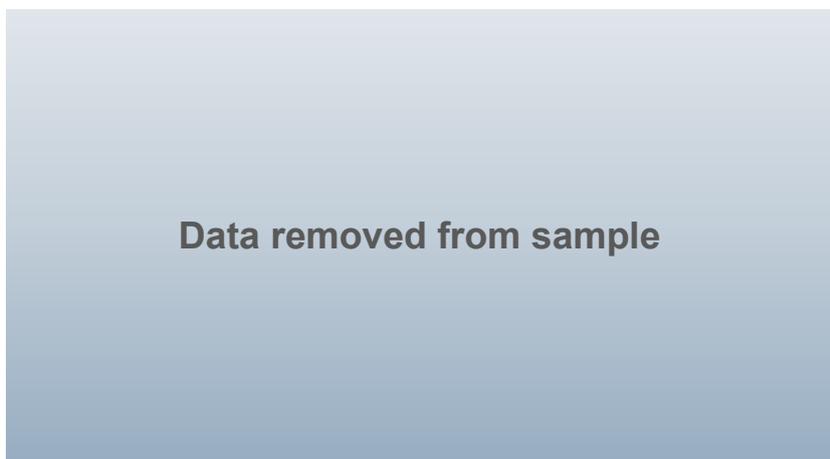


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

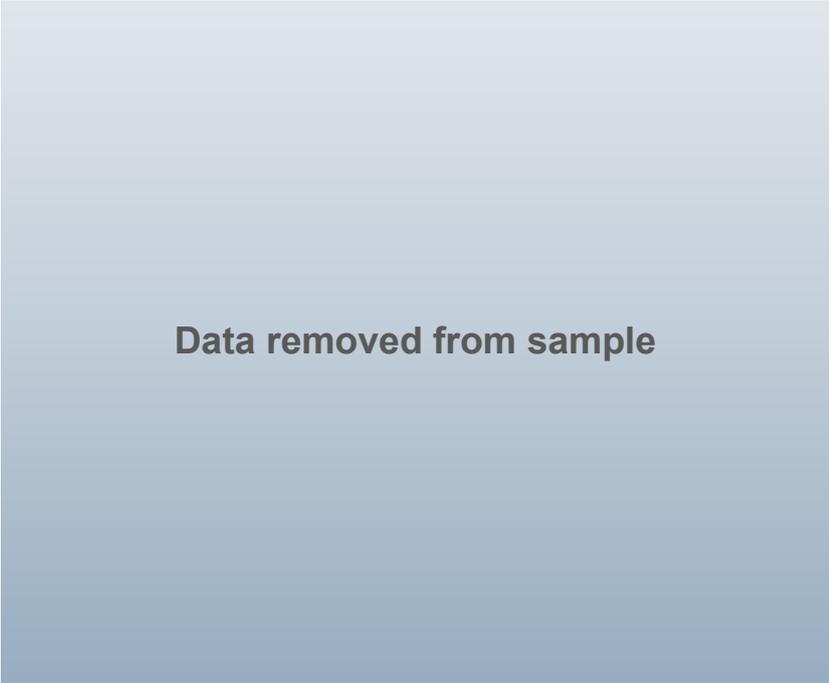
**Table 61** Distribution of Other Pet Food by Format: % Value 2017-2022

% 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



- 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

**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
- 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
- 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

**Data removed from sample**

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

**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

**Data removed from sample**

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

# 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

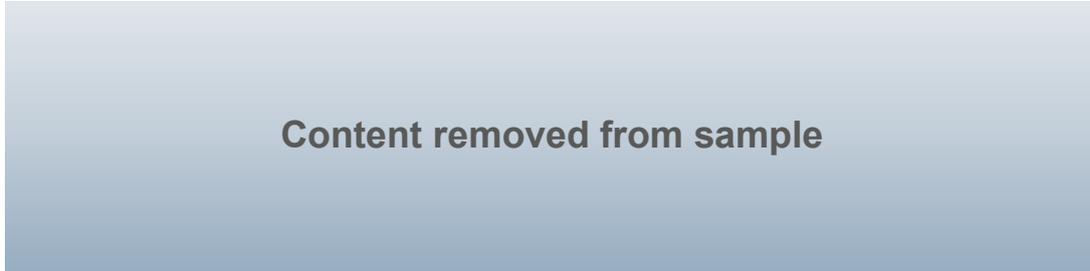
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COVID-19 boosts distribution via e-commerce

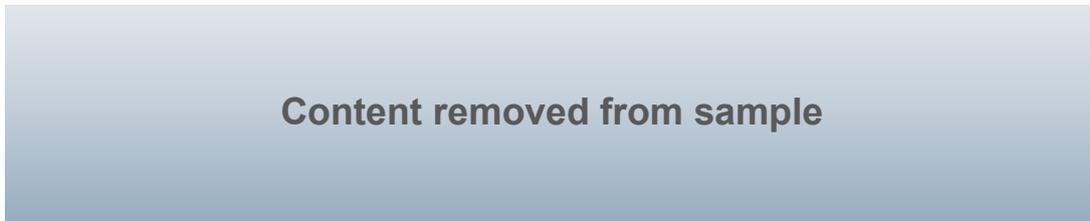
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## PROSPECTS AND OPPORTUNITIES

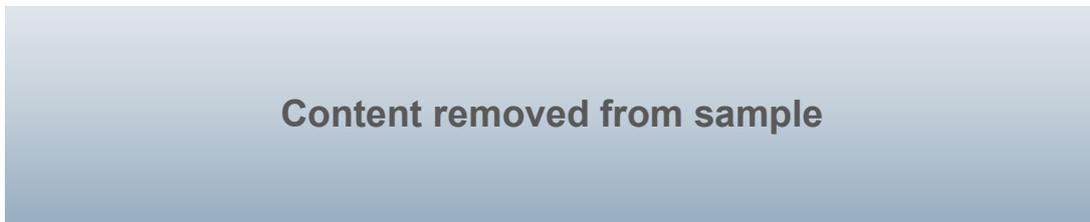
High innovation from A small brand with an eco-friendly product in cat litter



Demand for pet health and wellbeing offers opportunities in pet healthcare



Health trend also supports new innovations



## CATEGORY DATA

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

THB million	2017	2018	2019	2020	2021	2022
Cat Litter	<b>Data removed from sample</b>					
Pet Healthcare						
Other Pet Products						
Pet Products						

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

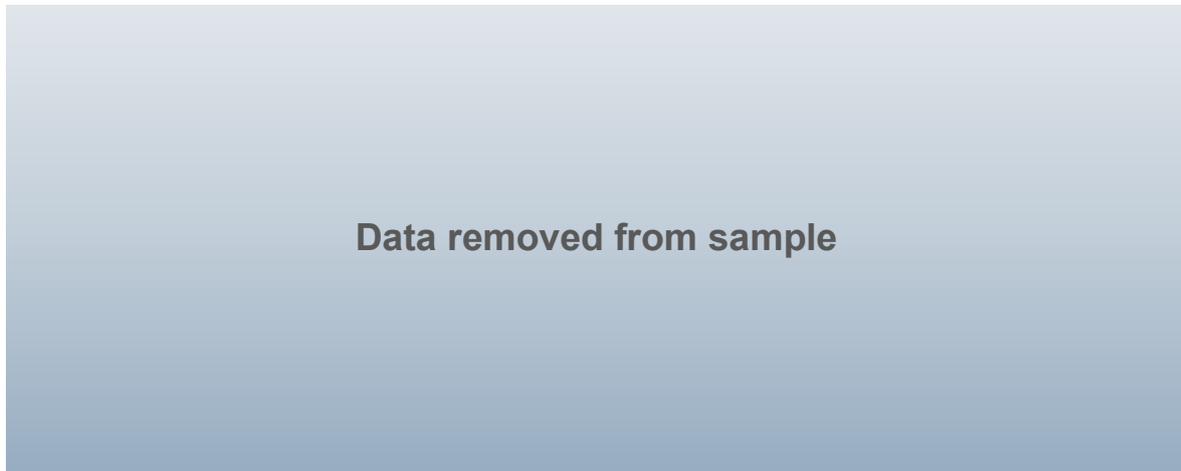
Company	2017	2018	2019	2020	2021
---------	------	------	------	------	------

**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
-----------------------------------	---------------	------	------	------	------

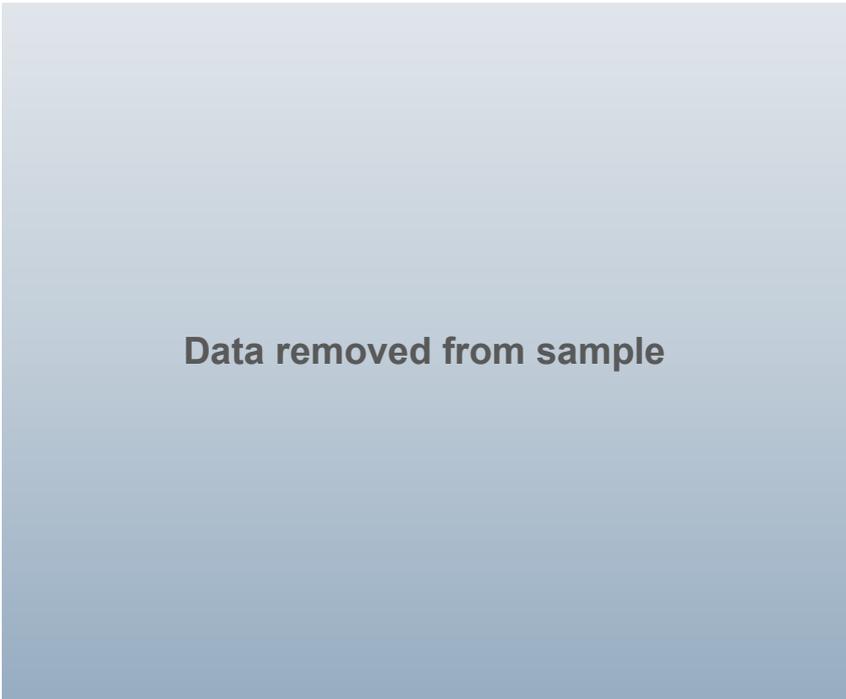


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

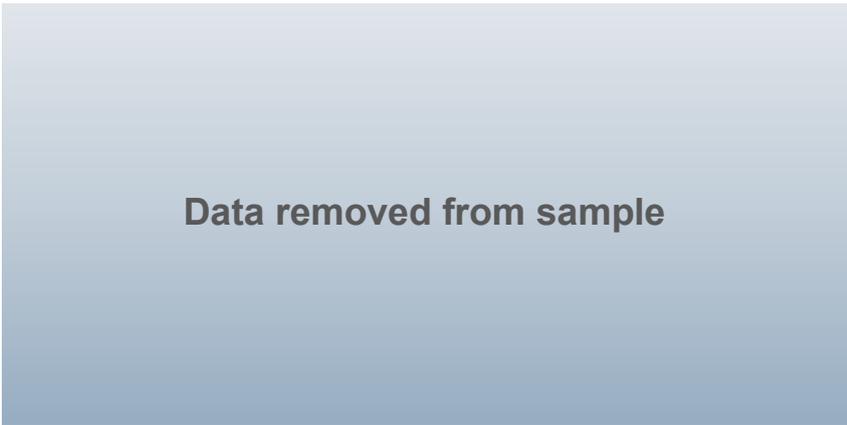
**Table 72 Distribution of Pet Products by Format: % Value 2017-2022**

% retail value rsp	2017	2018	2019	2020	2021	2022
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- 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



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	<b>Data removed from sample</b>					
Pet Healthcare						
Other Pet Products						
Pet Products						

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	<b>Data removed from sample</b>		
Pet Healthcare			
Other Pet Products			
Pet Products			

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