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Report Highlights:

With one of the highest dog and cat ownership rates in Asia, the Philippines presents a growing opportunity for U.S. pet food. As pets became more popular household companions, especially during the pandemic, pet ownership and pet food sales have grown immensely over the past five years. Dog and cat food exports from the United States reached record-high sales of 51 million dollars in 2021. Total pet food sales in 2021 were 434 million dollars and are estimated to grow by 9 percent in 2023. Product prospects include dry and wet pet food as well treats and mixers.

Philippine Market Brief

Pet Food



The Philippines offers a growing opportunity for U.S. pet food. While people were confined to their homes during the pandemic, dog and cat adoptions increased and pet food consumption grew. Dog and cat food exports from the U.S. reached a record high in 2021 and will continue to increase, though with slower growth in 2023.

With the dog population in the Philippines ranking fifth in the world, dog food forms the bulk of pet food sales. Dry food forms the majority of dog food sales, with a nine percent forecast growth in 2023. Cat food, though minimal compared to dog food, has shown upward sales growth since 2017. Cat food, mostly the wet type, is estimated to grow 13 percent next year. Pet food treats and mixers also present an opportunity. Growth in pet food for birds, fishes, and small mammals or reptiles remains minimal, averaging four million dollars since 2017.

The Philippines is the 7th largest market for U.S. agricultural exports. The country ranked the highest in Southeast Asia in 2022 for U.S. consumer-oriented exports, valued at 1.6 million dollars, a 19 percent growth from 2021.

Importers, however, continued to experience less competitive shipping rates and higher tariffs compared to ASEAN, China, Australia, and New Zealand.

Table 1 Pet Food Products in the Philippines

Dog Food	dry dog food, wet dog food, dog treats, and dog food mixers
Cat Food	wet cat food, dry cat food, cat treats, and cat food mixers
Other Pet Food	fish food, bird food, and small mammal/reptile food

Source: [Euromonitor](#)

Market Situation and Trends

- Based on the [2021 Rakuten's survey](#) in Asia, the Philippines ranked the highest in dog **ownership** at 67 percent and the second-highest in cat ownership at 43 percent.
- With dogs providing additional security at home, **dog adoption** remains the highest among pets in the Philippines. The [Philippine Canine Club, Inc.](#) estimated a total of 10.8 million dogs in 2020, pure-bred or not. Based on their [statistics](#), registered puppies and litters surged in 2021, with over 40 percent growth from 2020 to 2021.

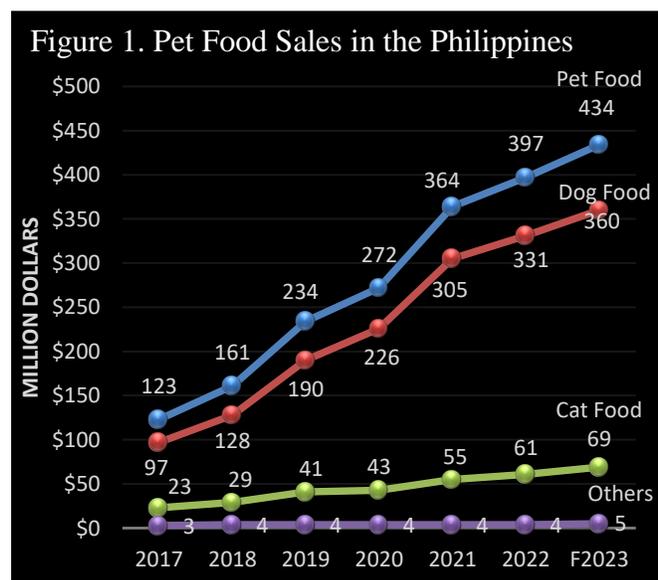


- **Cats** rank second in pet **adoption** and are gaining popularity recently as more people searched for cats on the internet during the pandemic.
- From an average of 7 percent growth in previous years, the Philippine Canine Club, Inc. statistics showed puppies and litters [registration](#) soared to 42 and 43 percent, respectively, in 2020 and 2021. Many Filipinos who previously were not pet owners acquired a pet during the pandemic, as recent studies show animal companionship serves as a healthy coping mechanism.
- With the rise of **condominiums**, Filipinos adopted smaller pets, given the limited living space. Apart from smaller dogs, more condo dwellers prefer cats, given their quiet nature and comfort with indoor living.
- Aside from pet hospitals mushrooming in key cities, more **pet care centers** emerged, including pet wellness centers and pet hotels.

- **Consumer spending** began to rebound as [household expenditures](#), including pet food, expanded for six straight quarters.

Pet Food

- **Pet food sales** are estimated to grow by nine percent in 2023 to 434 million dollars.
- According to the [Pet Food Institute](#), more than 50 percent of the dog and cat population feed on **table scraps**, showing a large potential for conversion to dry pet food.
- **Dry dog food** remains the best-performing pet food in terms of sales, with a forecast growth of nine percent.
- **Economy dry dog food** forms the bulk of dog food sales due to the high demand for affordability and convenience.
- **Cat food** sales, though lesser in volume than dog food, show potential for growth since 2017, with 13 percent estimated growth in 2023.
- **Mid-priced wet cat food** remains the preferred pet food for cats in the Philippines.
- Companies introduced **dog and cat food mixers** with antioxidants, nutrition-filled ingredients, or formulas to increase appetite, which are suitable for sensitive digestive systems.
- **Premiumization trends** led to product quality improvements. Some pet owners prefer pet



Source: [Euromonitor](#)

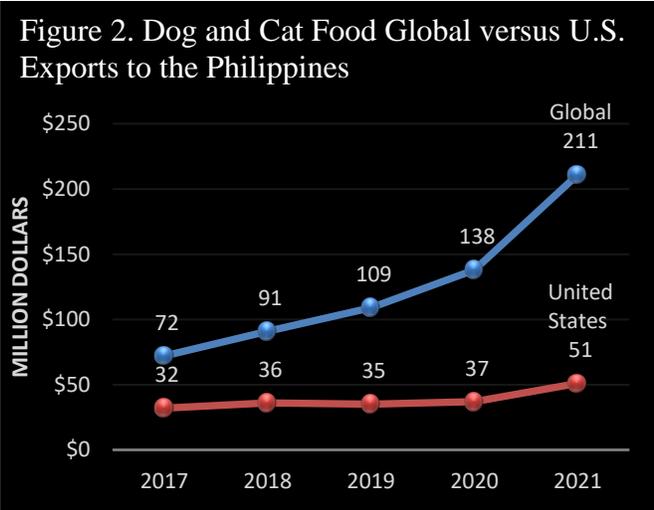
food free from artificial flavors and preservatives, while others opt for freshly prepared pet food, at times packed conveniently for individual meal consumption. A few stores started offering frozen and freeze-dried pet food.

- **Healthier options** became popular such as pet food with plant-based, organic, probiotics, hypoallergenic, Omega-3, and Omega-6 ingredients. Manufacturers formulated products for brain and bone structure development and improvement of the heart, urinary tract, and immune system.

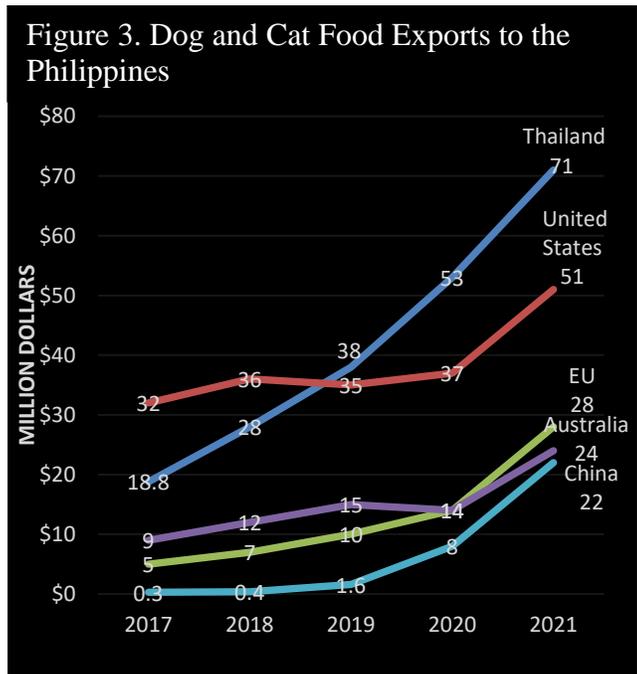
Pet Food Exports

Though more local manufacturers recently showed interest in selling pet food, most pure-breed pet owners prefer imported pet food. Dog and cat food exports to the Philippines showed immense growth in 2021 and are expected to grow in 2023. The majority of imported dog and cat food originates in Thailand, the United States, and Europe. Pet food from the United States dominated the market from 2016 to 2019. The Philippines ranked as the [ninth largest market for U.S. dog and cat food](#) in 2021.

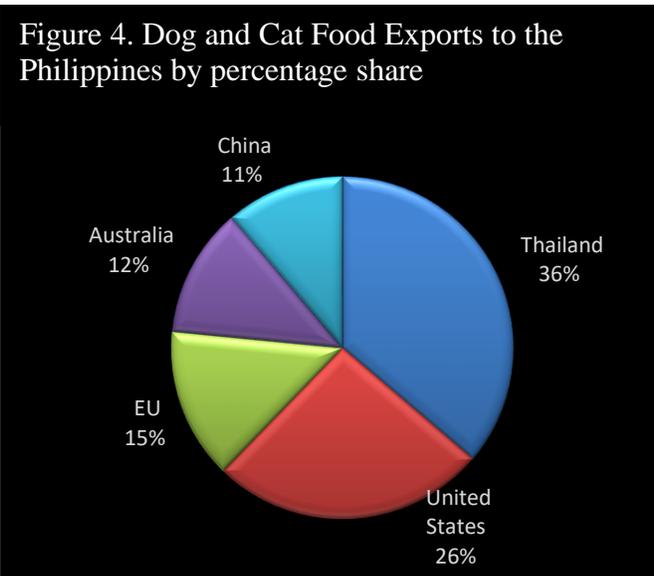
Importers of U.S. pet food experienced shortages in supply due to increased demand and logistical challenges during the pandemic. Apart from some U.S. brands, pricing, and the entry of new players, such as [San Miguel Foods Inc.](#), contributed to the rise in sourcing from Thailand.



Source: [Trade Data Monitor](#)



Source: [Trade Data Monitor](#)



Source: [Trade Data Monitor](#)

Retail Channels

The majority of the stores selling pet food are in Metro Manila and other key cities. While most dog and cat foods are sold in supermarkets, mom-and-pop stores, hypermarkets, and warehouse clubs, pet shops sell one third of pet food in the Philippines. On the other hand, retail stores such as SM Retail, S&R, and Landers developed private labels to offer lower prices.



Most pet shops are in malls or have standalone stores. Others can be found in clusters such as [Cartimar Shopping Center](#) and [Tiendesitas](#). Pet store chains present opportunities for product launching for new and imported pet food brands.

Most pet food brands have their own online stores as well as official stores on the two dominant online retail platforms, Shopee and Lazada. Though online pet food stores increased during the pandemic, sales volume remains minimal. For further details on retail stores, see the [Food Retail Report](#).

Table 2 Top Pet Food Brands in the Philippines

Dog Food	Pedigree, SmartHeart, Vitality, Monge, Nutri Chunks, Royal Canin, and Cesar
Cat Food	Whiskas, Monge, Sheba, Temptations, Royal Canin, and Ciao
Other Pet Food	Tetra, Sera, Bio-Gold, Bio-Min, and Nutribird Beo

Source: [Euromonitor](#)

Table 3 Top Pet Food Companies in the Philippines

Dog Food	Mars Philippines Inc., Pet Plus Global Marketing Corp., Consumer Care Products, Pet Discount Inc., San Miguel Foods Inc., and Royal Canin Philippines, Inc.
Cat Food	Mars Philippines Inc., Pet Discount Inc, and Royal Canin Philippines Inc.
Other Pet Food	Spectrum Brands Holdings, Bio Research Inc., and Sera GmbH

Source: [Euromonitor](#)

Table 4 Pet Stores in the Philippines

Retail	Retail and Online	Online
Cartimar Pet Center	Bow and Wow	Pet Warehouse Philippines
Pet Lovers Center	Pet Express	
Pooch Park	Dogs and the City	
Dog City	Petto Bento	
Koi Hob	Pet Shop PH	

Source: USDA-FAS interviews and research

Importation and Logistics

While most U.S. exporters transact with agents, distributors, or importers in key cities, other exporters directly contact the central purchasing offices of pet food distributors, manufacturers, and retail stores for large volumes. Please access the following for general guidance in importation:

- [Philippines Country Commercial Guide](#) for general information in doing business in the Philippines
- [Philippines: Exporter Guide](#) for new-to-export companies

The Department of Agriculture (DA), through the [Bureau of Animal Industry](#) (BAI) Animal Feeds, regulates the importation of animal feed ingredients including feed pre-mixes, animal feeds, and animal feed products.

Prior to shipment, the Philippine importers must register and become accredited with the Bureau of Animal Industry's Animal Feed. Other import requirements are as follows:

- Issuance of Animal Feed Establishment Registration Certificate (Initial and Renewal)
- Issuance of License to Operate (Initial and Renewal)
- Issuance of Certificate of Product Registration (CPR) (Initial and Renewal)
- Issuance of Certificate of Feed Product Registration (CFPR) (Initial and Renewal)
- Issuance of Brand Name Clearance
- Electronic Issuance of Sanitary Phytosanitary (SPS) Import Clearance (for FEEDS/VDAP IMPORTERS/INDENTORS)

For more information: <https://www.bai.gov.ph/afvdbcd-services#>

USDA's [Animal and Plant Health Inspection Service](#) (APHIS)-Veterinary Service needs to issue an Animal Product Export Certificate (VS 16-4) for all animal feeds, animal feed ingredients and pet food exports. For the list of allowed ingredients for pet food, access [animal products to the Philippines](#).

For detailed information regarding standards and regulations for exporting dog and cat food to the Philippines, please refer to the [Philippines: FAIRS Annual Country Report](#). Tariff rate for pet food is at five percent.

[USDA-FAS Manila](#) at the U.S. Embassy is ready to assist exporters in providing U.S. agricultural products to the Philippines and helping potential importers obtain access to U.S. suppliers. To avail of the services, contact (632) 5301-2000 or e-mail AgManila@usda.gov.

Attachments:

No Attachments.



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Foreign Agricultural Service



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