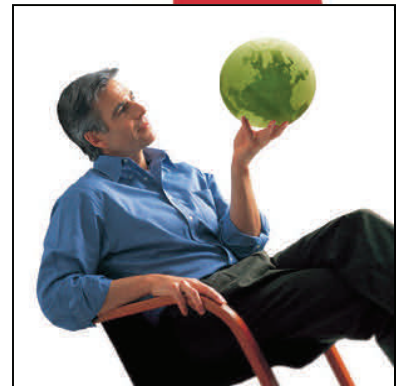




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MARKET ANALYSIS REPORT | FEBRUARY 2013

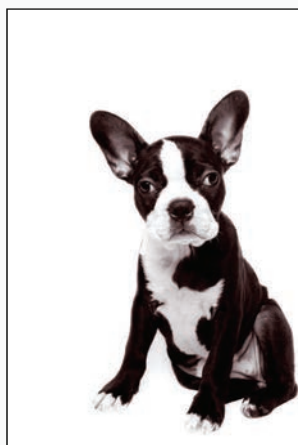
## Consumer Trends Pet Food in Singapore





▶ **EXECUTIVE SUMMARY**

- ▶ Pet ownership has seen some growth and pets are increasingly valued in Singapore. As the national economy recovers from the global recession, Singaporeans are spending more money on their pets, treating them with higher quality food and accessories.
- ▶ The environment in Singapore poses some challenges to pet ownership. The country's highly dense population (7,257 people per square kilometer) and high-rise flats leave little space for pets. Additionally, Singaporeans have increasingly hectic lives, leaving little time to spend with family, let alone to take care of a pet.
- ▶ The pet population in Singapore has grown over the past four years. The small mammals population grew at a Compound Annual Growth Rate (CAGR) of 13.1% between 2006 and 2010, while the cat population grew at a CAGR of 6.9% in the same period.
- ▶ The retail pet food market reached a value of US\$72 million in 2012, growing at a CAGR of 3.9% over the previous five years. It is expected to continue to grow at a lesser rate over the coming years to reach a total market size of US\$85.6 million by 2016.
- ▶ Dog and cat food continue to dominate the pet food category, with over 85% of the retail market. Dry dog and cat food will continue to increase in popularity as Singaporeans seek an alternative to wet food, which quickly spoils once opened due to the country's hot climate.



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▶ **DID YOU KNOW?**

- ▶ In Singapore, all pet dogs must have licenses from the Agri-Food Veterinary Authority (AVA).
- ▶ Under the Housing and Development Board (Animals) Rules 1989, only one dog of an approved small breed is allowed per residential unit.

**Source:**  
Singapore Agri-Food Veterinary Authority



## ▶ PET RETAIL MARKET

The lives of Singaporeans have become increasingly busy over the past few years, leaving them with little time for pets. Additionally, Singapore's environment is not the most conducive to keeping pets. The country has a highly dense population and heavily built-up environment, and most people live in Housing and Development Board (HDB) flats, which leaves little space for pets.

However, despite these challenges, the pet population in Singapore grew by 5% between 2006 and 2010, a small growth that can be attributed to the popularity of pets among older people and children. As can be seen in below, favorite pets in Singapore include fish, dogs, cats and birds. Other popular pets are small mammals, such as rabbits and hamsters.



When ranked based on total population, fish accounted for over half of the pet population in 2010 and grew at a Compound Annual Growth Rate (CAGR) of 6.2% between 2006 and 2010. Fish are very popular pets, as they require limited space and consume little of their owners' time. Fish are also seen as a symbol of luck and prosperity. Goldfish and Guppies are favoured by children, while adults and older generations prefer the Luohan and Koi species.



Dogs are the second most popular type of pet, with a total population of 108,000 in 2010. As indicated below, the dog population in Singapore grew at a CAGR of 1.7% between 2006 and 2010. The Shih Tzu breed was the most popular with Singaporeans. Regulations for pet ownership are strict in Singapore: all pet dogs must have a licence issued by the Agri-Food Veterinary Authority (AVA), which must be renewed annually. Dogs must wear collars and license tags and they must be leashed in public places. Furthermore, newly licensed dogs must have a microchip to enable easy tracking.

Birds made up the third-largest pet population in Singapore, although with the influence of Western media, other types of pets have begun to replace bird ownership. Birds are more popular amongst older people and bird ownership has experienced a decline of 7.4% CAGR between 2006 and 2010.

The cat population has remained relatively small, despite its 6.9% CAGR between 2006 and 2010. As indicated below, the cat population totalled 48,000 in 2010, the smallest pet population in Singapore. Small mammals, on the other hand, reached a total population of 79,000 and grew at a CAGR of 13.5%, which is the highest growth seen in the pet category.

**Singapore Pet Population in Thousands of Animals**

Total Pets	2006	2007	2008	2009	2010	CAGR % 2006-2010
Dogs	106	107	108	108	108	1.7
Cats	45	46	46	47	48	6.9
Birds	96	94	92	91	89	-7.4
Fish	438	440	449	457	465	6.2
Small mammals	70	70	73	77	79	13.1

Source: Euromonitor, 2012.



▶ **PET RETAIL MARKET (continued)**

The pet food market in Singapore has increased at a CAGR of 3.9% over the past five years (2007-2012). The market has grown from US\$60 million in 2007 to over US\$72 million in 2012. It is expected to continue to grow to US\$85.6 million by 2016.

Over 80% of pet food sold in Singapore belongs to the dog and cat food sub-category. This sub-category has grown at a CAGR of 4.4%, reaching US\$61 million in 2012. It is expected to continue to grow to US\$73.6 million by 2016.

Volume sales of pet food have also been on the rise, although at the slower rate of 2.2%. This is indicative of a rise in unit prices of dog and cat food, in particular. Premium options are being better-received by consumers and have a higher unit price.

**Singapore Pet Food by Type, Retail Market Sizes - Historic/Forecast in US\$ Millions**

Category	2007	2008	2009	2010	2011	2012	2013	2016
Pet food	60.0	62.0	64.1	66.5	69.6	72.6	75.9	85.6
Dog and cat food	49.3	51.1	53.0	55.3	58.3	61.2	64.5	73.6
Other pet food	10.7	10.9	11.1	11.2	11.3	11.3	11.4	12.0

Source: Euromonitor, 2012.

**Singapore Pet Food by Type, Retail Volume Sales - Historic/Forecast - in Tonnes**

Category	2007	2008	2009	2010	2011	2012	2013	2016
Pet food	8,513.9	8,610.7	8,777.7	8,996.8	9,271.9	9,521.3	9,750.3	10,372.3
Dog and cat food	7,727.9	7,826.9	7,991.4	8,209.1	8,481.0	8,729.8	8,963.3	9,586.3
Other pet food	786.0	783.8	786.3	787.7	790.9	791.5	787.0	786.0

Source: Euromonitor, 2012.



▶ **DOG FOOD**



- ▶ The economic recovery in Singapore following the global economic recession has given Singaporeans the opportunity to spend more money on their pets. Additionally, the trend of consumers treating their dogs as part of their family has also reached Singapore. Premium dog food is expected to become a popular option for Singaporeans, who may perceive it as a healthier alternative to lower-end pet food. As a result, more companies are offering premium food for dog owners.
- ▶ Dog food experienced a value growth of 6% between 2010 and 2011, reaching a market size of US\$42 million. The growing dog population, along with consumer willingness to spend more on pets, will increase growth in the dog food market over the coming years. Dog food is expected to grow at 2.5% from 2011 through to 2016.
- ▶ Dog owners will continue to seek dog food that is prepared and convenient to serve. Prepared food with nutrients catering specifically to dogs will become increasingly popular. Companies are already responding to this new trend, switching their products from non-prepared to prepared.
- ▶ Treats and mixers accounted for a minority of the volume of dry dog food. Singapore's hot climate is not the best environment for wet food, as it spoils quickly once opened. For this reason, consumers are opting for dry food over wet dog food. Dry dog food is expected to grow at a CAGR of 3%, while wet dog food is expected to have a slower growth rate of only 1.7% CAGR.
- ▶ Small breeds are the most popular types of dogs in Singapore, as homes are generally small. Treats and food tailored to smaller breeds will be well-received by consumers. The dog treats and mixers sub-category saw the highest growth in 2011, and is expected to continue to grow at a CAGR of 6%, higher than any other dog food sub-category.

**Sales of Dog Food by Category - % Value Growth Historic/Forecast**

	2010-2011	CAGR 2006-2011	CAGR 2011-2016
<b>Total dog food</b>	<b>6.0</b>	<b>4.3</b>	<b>2.5</b>
Dog treats and mixers	9.5	10.1	6.0
Dry dog food	6.2	4.9	2.7
Wet dog food	3.7	0.5	1.7

Source: Euromonitor, 2012.

- ▶ The best distribution channel for dog food continues to be pet shops and pet superstores, as these accounted for a combined 80% value share of dog food. These types of stores usually have trained staff that are knowledgeable about pets and offer their expertise to consumers.
- ▶ A number of companies are present in the dog food market in Singapore. Hill's Science Diet dominates the market with 17.3% market share, followed by Iams Co's Eukanuba, which has 11.9% market share, and Mars Food Inc. with 10.1% market share.

**Top Five Dog Food Brand Shares - % Retail Value RSP 2007-2010**

Brand	Company	2007	2008	2009	2010
Hill's Science Diet	Hill's Pet Nutrition Inc.	17.6	17.6	17.5	17.3
Eukanuba	Iams Co. The	11.1	11.7	11.6	11.9
Pedigree	Mars Food Inc.	10.8	10.6	10.3	10.1
Cesar	Mars Food Inc.	8.4	8.4	8.5	8.6
Royal Canin	Royal Canin SA	3.6	3.6	3.9	4.2

Source: Euromonitor, 2012.

▶ **CAT FOOD**



- ▶ Pet cats are increasingly being considered part of the family, leading owners to purchase higher-end cat products to maximize their pet's health and well-being. This behaviour could also explain the small increase in the cat pet population, which has grown from 47,900 in 2010 to 48,500 in 2011.
- ▶ Cat ownership will continue to grow, and the cat population is expected to increase to 51,000 in 2016. The most popular cats in Singapore are short-haired breeds, as they require less maintenance and have a lower chance of causing allergies within the household.
- ▶ As with dog food, demand for dry cat food is expected to increase. Wet cat food increased at a CAGR of 3.5% between 2006 and 2010, while dry cat food experienced a higher CAGR of 4.2%. This reflects cat owners' preference for dry cat food. Consumers are seeking easier-to-store and handle, dry cat food. Euromonitor estimates that premium, dry cat food will see the healthiest performance, with a CAGR estimated at 4%. Consequently, wet cat food will become less popular. Dry cat food is expected to expand from 51% volume share of cat food, to 52% in 2016.
- ▶ Cat owners are also seeking prepared food for their cats. Prepared food represented 84% of total cat food consumption. Non-prepared food accounted for 16.3% in 2011, 2% less than in 2006.
- ▶ The rise in cat ownership is also indicative of an increase in newborn kittens. Products tailored to age-specific cats has become a popular trend.
- ▶ It is important to note that, as Singaporeans are spending more money on premium cat food, they are increasingly concerned about their pets' wellbeing. Therefore, functional health and wellness cat foods that treat specific cat issues, such as hairball control, weight management and oral care, have been well-received by consumers.

**Sales of Cat Food by Category - % Value Growth Historic/Forecast**

	2010-2011	CAGR 2006-2011	CAGR 2011-2016
<b>Total cat food</b>	<b>4.0</b>	<b>3.8</b>	<b>1.4</b>
Cat treats and mixers	-	-	-
Dry cat food	4.3	4.2	1.9
Wet cat food	3.7	3.5	1.0

Source: Euromonitor, 2012.

- ▶ Nestlé Singapore Pte Lte is the leading company, with over 44% of market share. Its two main brands are Friskies, which accounts for 29.3% of the cat food market, and Fancy Feast, which accounts for 14% of the market. Mars Food Inc. has the second-biggest market share with its brand Whiskas, which accounts for 27.3% of the market.

**Top Five Cat Food Brand Shares - % Retail Value RSP 2007-2010**

Brand	Company	2007	2008	2009	2010
Friskies	Nestlé Singapore Pte. Lte.	29.7	29.4	29.4	29.3
Whiskas	Mars Food Inc.	27.4	27.5	27.4	27.3
Fancy Feast	Nestlé Singapore Pte Lte.	13.6	13.7	13.8	14.0
Hill's Science Diet	Hill's Pet Nutrition Inc.	7.2	7.0	6.9	6.9
Iams	Iams Co. The	4.8	5.0	5.0	5.0

Source: Euromonitor, 2012.





## ▶ OTHER PET FOOD

- ▶ The majority of Singaporeans are ethnically Chinese, and the Chinese culture has had positive impact on ownership of small pets. The year 2011 was the year of the rabbit, according to the Chinese zodiac, which encouraged many Singaporeans to purchase a rabbit. As a result, the rabbit pet population grew from 79,300 in 2010 to 81,000 in 2011. Sales of small mammal/reptile food grew 5.5% between 2010 and 2011.
- ▶ The value of other pet food has been growing at a CAGR of 1.3% over the past five years. The following table depicts the sales of other pet food by category. Despite an increase in the population of small mammals and other pets, the value of other pet food is only expected to grow 0.6% over the next five years.
- ▶ The bird population has been in decline since 2000. These pets are particularly popular among aging Singaporeans, but have attracted less attention from children, who prefer more interactive pets such as hamsters and rabbits. Pet bird food is expected to continue to decrease over the next few years.
- ▶ It has become increasingly popular for parents to purchase small pets as companions for their children. The most popular pets are hamsters, guinea pigs and rabbits. Small mammals and reptiles require little space and are easy to care for; an ideal combination given Singapore's high-density and apartment housing. The overall population of these other pets increased from 633,200 in 2010 to 638,000 in 2011.
- ▶ The fish population has also grown over the past five years from 438,000 in 2006 to 470,000 in 2011. Fish symbolize wealth and prosperity in the Chinese culture and are therefore favourite pets for Singaporeans. Breeds like Koi and Luo Han are the most popular, because of their vivid colours. Fish food that enhances these colours and physical appearance will remain popular.
- ▶ Pet shops remain the best distribution channel for other pet food. These specialty stores were expected to account for an 80% share of value sales in 2011.

**Sales of Other Pet Food by Category - % Value Growth Historic/Forecast**

	2010-2011	CAGR 2006-2011	CAGR 2011-2016
<b>Total other pet food</b>	<b>1.4</b>	<b>1.3</b>	<b>0.3</b>
Bird food	-3.0	-3.2	-2.3
Fish food	2.5	3.5	1.0
Small mammal/reptile food	5.5	4.8	2.1

Source: Euromonitor, 2012.





## ▶ OTHER PET FOOD (continued)

**Top Three Bird Food Brand Shares - % Retail Value RSP 2007-2010**

Brand	Company	2007	2008	2009	2010
8 in 1 Ultra Plan	8 in 1 Pet Products Inc	27.5	27.0	25.5	26.5
KayTee	Central Garden & Pet Co.	23.0	24.0	26.0	25.5
Sluis	P Sluis Co Holding	9.5	9.0	10.0	9.5

**Top Three Fish Food Brand Shares - % Retail Value RSP 2007-2010**

Brand	Company	2007	2008	2009	2010
Ocean Free	Quin Hu Corp Ltd	32.0	32.5	33.0	33.5
Bao Zheng Hong	Hai Feng Feeds Co Ltd	13.5	14.0	14.5	15.0
Hikari	Kamihata Fish Ind Ltd	8.0	8.5	8.5	8.5

**Top Small Mammal/Reptile Food Brand Shares - % Retail Value RSP 2007-2010**

Brand	Company	2007	2008	2009	2010
Marukan	Marukan Co Ltd	35.0	35.0	35.5	36.0
Burp!	Pet Lovers Centre Pte Ltd	2.5	2.5	3.5	4.0
Others		62.5	62.5	61.0	60.0

*Source for tables: Euromonitor, 2012.*

## ▶ EXPORTING AND REGULATIONS

The Agri-Food and Veterinary Authority (AVA) [[www.ava.gov.sg](http://www.ava.gov.sg)] is responsible for regulating the importation of animal feed, as well as the manufacturing, processing and sale of animal feed in Singapore. The AVA defines pet food as “animal feed meant for companion animals such as cats, dogs, hamsters, rabbits, gerbils, chinchillas, guinea pigs, fish and birds. Pet food includes rawhides, pet chews and dog biscuits, and cat/dog treats.” (AVA, 2012)

All imported pet food requires an import permit or Cargo Clearance Permit (CCP) from the AVA, which can be obtained by declaring the import through TradeNet (<https://www.TradeNet.gov.sg/tradenet/default.portal>). There is a CCP fee for the import or transshipment of livestock feed.

Pet food exported to Singapore can be classified into three different sub-categories: pet food containing meat products, pet food without meat products, and other pet products.







## ▶ EXPORTING AND REGULATIONS (continued)

### ***Pet products with meat***

All pet products (including rawhides/pet chews) with meat and meat products originating from Canada must include a health certificate from the veterinary administration of the exporting country certifying:

- ▶ Importer name and address, and telephone contact (if any)
- ▶ Manufacturer name and address
- ▶ Manufacturing plant approved by veterinary administration of the exporting country
- ▶ Manufacturing plant number (if any) and full address of manufacturing plant
- ▶ Manufacturing process, e.g. heat treatment at minimum 70°C for 30 minutes
- ▶ Brand name
- ▶ Batch information of the products (must include manufacturing date or dates)
- ▶ Clear description of product details, including species information (dog or cat), type of food (wet or dry), packaging information (pouch, can, bag)
- ▶ Freedom from Bovine Spongiform Encephalopathy (for pet food containing beef or beef products)\*
- ▶ For pet food containing meat or meat products, either:
  - ▶ Certification of country freedom from Foot and Mouth Disease (FMD) and Rinderpest for the last six months prior to date of export; or
  - ▶ Certification of the manufacturing process, and declaration that the treatment process is sufficient to inactivate all pathogens of concern, namely FMD virus and Rinderpest virus.
- ▶ The end product was packed in the plant in new and sterilized packaging and precautions were taken to prevent contamination

### ***Pet food not containing meat/meat products***

For pet food not containing meat or meat products, pet chews/biscuits not containing meat or meat products, pet food for small mammals, fish feed and bird feed, the importer must declare the import through TradeNet and follow the usual mandatory food import steps.

### ***Other pet products***

For pet products such as oral and topical/injectable vitamins and additives/supplements (tablets/syrup), a declaration is required through TradeNet. Products that contain meat flavouring, such as beef/liver/chicken extracts, would not require further assessment by AVA.

Pet supplements with therapeutic claims must submit a full ingredient list, source/supplier information, product registration and approval status in the country of export, and product labelling to AVA for evaluation. Labels cannot claim to diagnose, treat, cure or prevent animal diseases, or anything claimed to be endorsed by the AVA. The AVA does not register or approve such products for animal consumption.



**\*Note:** import of feed containing beef from Canada, the United Kingdom and the United States is currently suspended because of Bovine Spongiform Encephalopathy (BSE or Mad Cow Disease).



## ▶ LABELLING

Once all the AVA regulations are met, the product must be labelled properly. Pet food is to be labelled in English with the following information:

- ▶ Name and address of the manufacturer
- ▶ Name and address of the importer
- ▶ Date of manufacture and expiry
- ▶ Directions for use for the intended animal species
- ▶ List of ingredients used in the pet food.
- ▶ Its guaranteed analysis in a complete and balanced diet (must meet the internationally recommended nutritional standards, e.g. from the National Research Council and Association of American Feed Control Officials).

### **Labelling Requirements**

The packaging of all animal feed/pet food sold in Singapore must be clearly labelled, in English, with the following information:

- ▶ The list of ingredients used in the pet food
- ▶ The date of manufacture of the pet food and expiry date
- ▶ The species of animal for which the pet food is intended
- ▶ The name and address of the importer

## ▶ PRODUCT INTRODUCTIONS

- ▶ Mintel has reported a total of 25 new product launches in Singapore belonging to the pet food category between January 2007 and November 2012.

**Singapore - Pet Food - New Product Launches 2007-2012**

	2007	2008	2009	2010	2011	2012
Product Launches	4	6	13	0	0	2

Source: Mintel, 2012

- ▶ The most popular flavour for launches in Singapore between January 2007 and November 2012 was tuna. Over 16% of all products were tuna flavor, while others were chicken or mackerel flavoured, the other two most popular flavours.
- ▶ Flavoured preference varied depending on the type of pet food. Chicken flavour was preferred for wet cat food, while tuna and fish was preferred for dry cat food. Salmon, Chicken and Beef flavours were preferred for cat snacks and treats.

**Top Five Flavours (incl. blends)  
for Pet Food Launches  
January 2007- November 2012**

Tuna
Chicken
Mackerel
Fish
Salmon

Source: Mintel, 2012



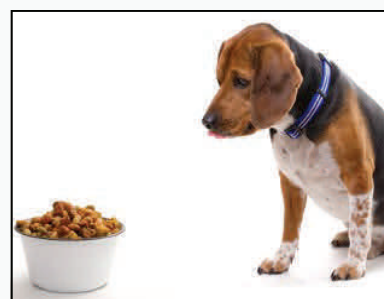
**▶ PRODUCT INTRODUCTIONS (continued)**

- ▶ The most popular sub-category for new pet food products launched in Singapore was wet cat food, with 13 new products out of a total of 25. Of these 13 products, three products had an “ethical/environmentally friendly” claim.
- ▶ The dry cat food sub-category was the second-most popular, with nine new product launches out of a total of 25. This sub-category had several functional pet claims, such as “immune system,” “heart and cardiovascular system,” “eyesight,” “digestion and urinary tract,” “vitamin/mineral fortified” and “added calcium”.
- ▶ The cat snack and treats sub-category was the third-most popular, albeit with only two new product launches.
- ▶ Functional pet claims were the most popular among new products. Approximately 16% of all new products claimed to have “skin and coat benefits,” while other products included claims such as “immune system,” “heart and cardiovascular system” and “eyesight benefit”.

**Top Four Sub-Categories for Pet Food Launches, January 2007- November 2012**

Cat food wet	13
Cat food dry	9
Cat snacks and treats	2
Dog snacks and treats	1

Source: Mintel, 2012



Source: Mintel, 2012

**Product Launches by Sub-Category  
January 2007 - November 2012**

Sub-Category	Claim Category	Package Type	Pack Size (grams)	Number of Launches
Dry cat food	Convenience	Flexible stand-up pouch	453.60	2
	Natural	Carton	500.00	2
	Pet	Carton	500.00	2
	Pet	Flexible	500.00	3
	Plus	Flexible	500.00	3
	Not specified	Carton	500.00	1
	Not specified	Flexible	1500.00	1
Wet cat food	Ethical & environmental	Can	156.00	1
	Ethical & environmental	Can	85.00	2
	Natural	Can	400.00	1
	Pet	Can	156.00	1
	Pet	Can	400.00	1
	Positioning	Can	85.00	1
	Not specified	Can	156.00	1
	Not specified	Can	85.00	8
Cat snacks and treats	Pet	Flexible stand-up pouch	60.00	1
	Not specified	Flexible stand-up pouch	60.00	1
Dog snacks and treats	Convenience	Flexible	100.00	1
	Pet	Flexible	100.00	1
<b>Total*</b>				<b>25</b>

Source: Mintel, 2012

\*Note: Total number of product launches might not add to the total product launches, as some products might have several flavours or varieties.



▶ **NEW PRODUCT EXAMPLES**

**Tuna Flavour Cat Food**  
Sub-Category: Dry cat food

**Company:** Effem  
**Brand:** Whiskas  
**Date Published:** April 2007  
**Pack Size:** 1.5 kg  
**Price (major currencies)**  
€3.89 / \$5.29



**Mackerel Flavoured Cat Food**  
Sub-Category: Wet cat food

**Company:** Nestlé Purina PetCare  
**Brand:** Purina Friskies  
**Date Published:** November 2012  
**Pack Size:** 400 g  
**Price (major currencies):** €1.40/ \$1.74  
**Claims:** No additives / preservatives, pet-adult



**Bistro Cat**  
Sub-Category: Wet cat food

**Company:** Pethouse Supplies PTE  
**Brand:** Seeds Bistro Cat  
**Date Published:** June 2009  
**Pack Size:** 85 g



**Liver & Chicken Feast in Gravy**  
Sub-Category: Wet cat food

**Company:** Nestlé Purina PetCare  
**Brand:** Fancy Feast Grilled  
**Date Published:** May 2009  
**Pack Size:** 85 g  
**Price (major currencies)**  
€0.76 / \$1.50  
**Claims:** Premium, Ethical - Environmentally Friendly Package



**Salmon Flavour Puffs Cat Treats**  
Sub-Category: Cat snacks and treats

**Company:** Nestlé Purina PetCare  
**Brand:** Purina Friskies Crispies  
**Date Published:** November 2012  
**Pack Size:** 60 g  
**Price (major currencies):**  
€2.54 / \$3.16  
**Claims:** Pet- Adult



**Mixed Grill Crunch Cat Treats (Chicken Flavour)**  
Sub-Category: Cat snacks and treats

**Company:** Nestlé Purina PetCare  
**Brand:** Purina Friskies Party Mix  
**Date Published:** March 2009  
**Pack Size:** 60 g



**Dry Cat Food**  
Sub-Category: Dry cat food

**Company:** Nestlé Purina PetCare  
**Brand:** Purina Friskies  
**Date Published:** October 2007  
**Pack Size:** 500g  
**Price (major currencies)**  
€1.70 / \$2.40  
**Claims:** Added Calcium, Vitamin/mineral fortified, digestion and urinary tract, eyesight.



**Chewy Biscuit**  
Sub-Category: Dog snacks and treats

**Company:** Perfect Companion  
**Brand:** Dr. Luv Care  
**Date Published:** July 2008  
**Pack Size:** 3x100 g  
**Price (major currencies)**  
€2.85/ \$4.44  
**Claims:** Convenient Packaging, Joints, Bones & Muscles (Functional Pet), Skin and Coat (Functional Pet), Teeth and Tartar Prevention (Functional Pet)



Source for all: Mintel, 2012



## ▶ RETAIL ENVIRONMENT

### ***Distribution channels***

The most popular channels for selling pet food in Singapore are pet shops and pet superstores. For example, pet shops and superstores accounted for 80% of value share of dog food. These types of stores are expected to remain the main channels for distributing pet food. Given the popularity of these types of stores, a number of new outlets are being established. Pet Lover Centre, owner of The Pet Safari and Pet Lover Centre banners, has already taken advantage of this trend by increasing the number of its outlets in Singapore.

### ***Retail Trends***

Two popular trends have been identified in the retail pet food market: loyalty cards and online shopping.

#### ***Loyalty cards and memberships***

Loyalty cards and memberships have proven to retain consumers, improving the rate of returning customers and increasing the likelihood of pet products (from food to toys) being bought where loyalty cards or memberships are established. A number of pet food stores in Singapore offer the option of becoming a member or signing for a loyalty card, with the benefit of discounts and offering other customer perks such as free products.

#### ***On-line shopping***

On-line shopping is also becoming increasingly popular in Singapore. As consumers become more and more time poor, finding a moment to go shopping for pet food, treats and toys can be difficult. Many pet stores offer their products online, with some even offering free shipping. Customers can shop at their leisure and have products shipped to their front door.

A few examples of stores leveraging these two new trends include:

#### **PetsCity ([www.petscity.com.sg](http://www.petscity.com.sg))**

Petscity offers a number of products and services for pet owners, including food and treats from various providers for cats and dogs, and professional grooming and obedience training. They are located in two different areas of Singapore.

#### **SingPet ([www.singpet.com](http://www.singpet.com))**

This online pet store provides products for dogs and cats, fish, birds, small animals and horses. Its online feature allows shoppers to find the best supplies and pet accessories at affordable prices. Singpet also offers a points program for its members.

#### **Red Mart ([www.Redmart.com](http://www.Redmart.com))**

This online grocer offers pet food for customers who are doing their weekly shopping online. Products available are Fancy Feast for Cats, Nutripe dog food and Alpo Adult Dog food.

#### **Dog Food Singapore ([www.dogfood.com.sg](http://www.dogfood.com.sg))**

Dog Food Singapore offers a number of dog and cat food products online. Its dog food brands include: Canine Caviar, Brit Care, Profin, Top Life, and NatureDietNature's Harvest. Its cat food brands include Canine Caviar, Top Life, Pez Mate, Brit Care, LECHAT (wet food), and Monge (wet food).





## ▶ TOP FIVE RETAILERS IN SINGAPORE

### Other Distribution Channels - Top Five Grocery Retailers in Singapore

Company	Number of Outlets	Total Sales Area SQ. FT.	Grocery Banner Sales (US\$ Millions)	Grocery Spending Market Share %
NTUC FairPrice	276	2,258,591	\$2,312	12.31
Dairy Farm	849	3,010,472	\$1,708	9.09
Sheng Siong	25	336,372	\$461	2.45
AS Watson	139	184,493	\$328	1.75
LVMH	11	247,570	\$321	1.71

Source: Planet Retail, 2012

## ▶ USEFUL RESOURCES

### Agri-Food and Veterinary Authority of Singapore (AVA)

<http://www.ava.gov.sg/>

AVA information on pet food

<http://www.ava.gov.sg/AVA/Templates/AVA-GenericContentTemplate.aspx?NRMODE=Published&NRNODEGUID=%7b46CF621D-5186-46E9-9D5D-60DE2DBECCB5%7d&NRORIGINALURL=%2fAnimalsPetSector%2fImportExportTransOfAnimalRelatedPrd%2fAnimalFeedLivestockAquaFeedAndPetFood%2f&NRCACHEHINT=Guest#petfood>

### Canadian Food Inspection Agency (CFIA)

[www.inspection.gc.ca](http://www.inspection.gc.ca)

CFIA - Chapter 11 Export - Singapore

<http://www.inspection.gc.ca/english/fssa/meavia/man/ch11/coupay/singape.shtml>

### Agriculture and Agri-Food Canada, Agri-Food Trade Service

<http://www.ats-sea.agr.gc.ca/intro/index-eng.htm>

Singapore - At a Glance

<http://www.ats-sea.agr.gc.ca/stats/5210-eng.htm>

Southeast Asia Regional and Country information

<http://www.ats-sea.agr.gc.ca/info/ase-eng.htm>

### Pets Enterprises & Traders Association, Singapore (PETAS)

<http://www.petas.org.sg/>



The Government of Canada has prepared this report based on primary and secondary sources of information. Although every effort has been made to ensure that the information is accurate, Agriculture and Agri-Food Canada assumes no liability for any actions taken based on the information contained herein.

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