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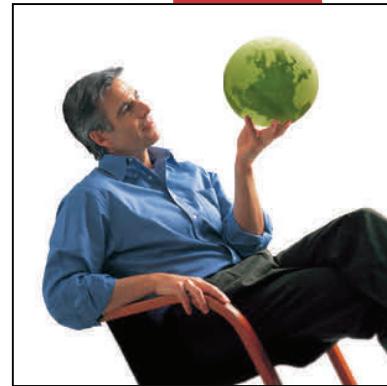


**International
Markets
Bureau**

MARKET INDICATOR REPORT | MAY 2012

Consumer Trends

Pet Food in Japan





► EXECUTIVE SUMMARY

More and more, people in Japan think of their pets as members of the family, which translates into business opportunities. The most popular pets are cats and dogs, particularly smaller breeds. With apartments being the most common type of domicile in Japan, smaller pets are better suited to the lifestyle of the Japanese consumer. It appears, however, that the dog and cat populations in the country have peaked. In 2008, there were 24 million cats and dogs in Japan, which dropped to 20.7 million in 2011¹, or by almost 14%. This decline can be attributed to a few factors, including a greater numbers of indoor pets that are living longer because of better food and pet care products. Also, despite many consumers agreeing that pets can provide comfort and companionship, they also require significant financial and time commitments, causing some amongst the aging population to refrain from adopting new pets.

In general, there appears to be somewhat less interest in "other" pets in Japan. Imports of birds continue to be restricted by the ongoing concerns about Avian (bird) flu—the number of pet birds fell from 3.7 million in 2006 to 2.3 million in 2011. The number of pet fish and small reptiles increased in 2010 and 2011 compared to numbers throughout much of the late 2000s, but remain a relatively small market.

As more Japanese choose not to have children, there has been a trend towards using pets as a form of substitute, creating a growing "pampered pet" industry. Be it designer clothing, pet spas, specialty foods, pet-focused restaurants, housing or even pet-friendly cars (Honda), consumers are making their pets a priority. However, in the aftermath of the 2011 Tohoku earthquake and tsunami, the desire to pamper pets with premium products may slow amid heightened concern about Japan's economy. Manufacturers could respond by offering consumers value-added products at lower prices, as well as more private label offerings.

Overall sales of pet food increased in the Japanese market in 2011, reaching US\$4.8 billion; sales of dog and cat food accounted for the bulk of sales at US\$4.5 billion. However, sales are forecast to decrease into 2016, as existing pets age and smaller indoor dogs become increasingly popular. Both of these factors should reduce the volume of pet food consumption. However, Japanese consumers are using more health and wellness products to support their own health, and this trend is extending to the pet food market. There are now more specialty pet food products with functional ingredients that address specific issues (obesity, care of joints/bones/muscles, vitamin/mineral fortification, oral health, food intolerances, etc.), as well as niche products tailored to a pet's age, breed, size and nutritional needs, in formats that are convenient to use. Japanese consumers are also buying more cat and dog treats as a standard.

¹ All 2011 data presented in this report is based on partial year estimates. Information is sourced from various Euromonitor International reports published in November 2011, unless otherwise stated.

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► DID YOU KNOW?

- ▶ Major global manufacturers of pet food (Mars, Hill's Colgate, Nisshin, and Nestlé Purina) dominate the Japanese pet food market.
- ▶ Only 22% of dog and cat food is sold through supermarkets—78% is sold through other store formats, especially non-grocery retailers (home improvement centres and drug stores). More than half (54%) of "other" pet food is sold through pet stores/superstores, followed by non-grocery stores (41%).

► MARKET OVERVIEW



Pet Populations in Japan – '000s of animals

	2006	2007	2008	2009	2010	2011
Dogs	12,089	12,522	13,101	12,322	11,861	11,439
Cats	9,596	10,189	10,890	10,021	9,612	9,276
Birds	3,660	3,385	3,055	2,800	2,550	2,295
Fish	35,183	35,359	35,536	35,750	37,900	37,521
Small Mammals	2,900	2,920	2,949	2,996	3,040	3,025
Reptiles	1,808	1,820	1,838	1,882	1,890	1,877

Pet Food Market Sizes in Japan – Retail Sales in US\$ Millions

	2006	2007	2008	2009	2010	2011
Pet Food	3515.2	3530.4	4099.6	4566.5	4681.3	4758.6
Dog and Cat Food	3298.7	3318.2	3859.3	4300.2	4395.8	4463.3
Dog Food	2026.1	2033.2	2361.2	2599.8	2647.9	2683.9
Cat Food	1272.6	1285.0	1498.1	1700.4	1747.9	1779.3
Other Pet Food	216.5	212.2	240.3	266.3	285.5	295.3
Bird Food	43.0	39.5	41.9	44.5	46.5	43.8
Fish Food	70.9	70.5	80.8	90.8	97.6	101.7
Small Mammal/Reptile Food	102.6	102.2	117.5	131.0	141.4	149.8

Pet Food Market Sizes in Japan – Forecast Retail Sales in US\$ Millions

	2012	2013	2014	2015	2016
Pet Food	4701.8	4677.3	4667.9	4656.8	4647.1
Dog and Cat Food	4405.9	4379.8	4368.5	4356.1	4345.3
Dog Food	2649.6	2639.4	2641.1	2645.3	2651.3
Cat Food	1756.3	1740.3	1727.4	1710.9	1694.0
Other Pet Food	295.9	297.5	299.4	300.7	301.8
Bird Food	40.5	38.0	35.9	34.1	32.8
Fish Food	101.5	101.2	100.4	99.1	97.3
Small Mammal/Reptile Food	153.8	158.4	163.2	167.5	171.7

Source for all: Euromonitor International.

- While some shifts within the pet food industry in Japan can be expected, the growth trends experienced in the past are not forecast to continue into 2016. However, new niche market opportunities, such as health and wellness products, are likely to open up, especially given the aging trend within the domesticated Japanese dog population.



► MARKET OVERVIEW (continued)

Japan Pet Food Top 15 Brand and Company Shares Retail Sales % Breakdown

Brand	Company name (GBO)	2007	2008	2009	2010
Pedigree	Mars Japan Inc	6.5	6.3	6.1	5.9
Hill's Science Diet	Hill's Colgate Japan Ltd	5.4	5.4	5.5	5.6
Nisshin	Nisshin Pet Food Ltd	5.7	5.7	5.8	5.6
Friskies	Nestlé Purina Pet Care KK	4.9	4.9	5.1	5.2
Aiken Genki	Unicharm Pet Care Co Ltd	3.7	3.9	3.8	3.7
Iams	Iams Japan KK	3.4	3.4	3.5	3.6
Neko Genki	Unicharm Pet Care Co Ltd	3.0	3.1	3.2	3.4
Vita-One	Nippon Pet Food Ltd	3.3	3.2	3.2	3.1
Royal Canin Veterinary Diet	Mars Japan Ltd	2.8	2.9	2.9	3.0
Gaines	Unicharm Pet Care Co Ltd	3.0	3.1	3.0	3.0
Petio	Yamahisa Pet Co Ltd	2.6	2.6	2.6	2.7
DoggyMan	DoggyMan Hayashi KK	2.1	2.2	2.2	2.2
Hill's Prescription Diet	Hill's Colgate Japan Ltd	2.0	2.0	2.1	2.2
Gonta	Marukan Co Ltd	-	-	-	2.1
Kal Kan	Mars Japan Ltd	1.7	1.7	1.7	1.7

Source: Euromonitor International.

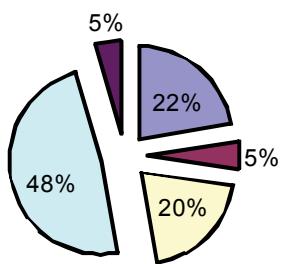
► RETAIL TRENDS

- ▶ In 2011, prepared dog and cat foods were expected to maintain shares of 45% and 55% of total consumption, respectively. While owners feel that giving their pets home-cooked food shows their love and affection, they are also aware that without the sufficient nutritional knowledge, non-prepared food can actually harm the animal.
- ▶ Convenience is also becoming a key factor. Dry food is becoming the preferred choice for both dogs and cats, as it is perceived by consumers to be more nutritionally balanced, better for dental health, and less expensive than wet food.
- ▶ Market segmentation is one of the main strategies that seems to be working in Japan's highly competitive pet food market. The majority of new pet food products have been developed for and targeted to particular market segments. These segments include: senior pets (over seven years of age), puppies, active or inactive animals, etc.; animals with particular medical conditions affecting the digestion and urinary tract, food intolerances/allergies, skin and coat, joints/bones/muscles, immune system, teeth/tartar, etc.; and particular sizes or breeds of animals (e.g., Chihuahuas).
- ▶ Products are also targeting specific health issues (with vitamin/mineral fortification, nutritional supplements, functional ingredients), and polarizing the market based on price. In the dog and cat food markets, sales through to 2016 of mid-priced and economy products are expected to decrease, while premium and therapeutic products will continue to rise.

► RETAIL TRENDS (continued)



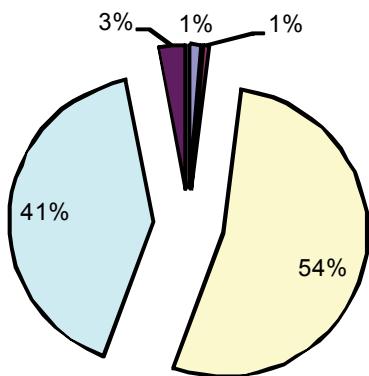
Top 5 Retail Outlets for Dog and Cat Food in Japan, 2011



- Supermarkets/Hypermarkets
- Other Grocery Retailers
- Pet Shops/Superstores
- Other Non-Grocery Retailers
- Non-Store Retailing

Source: Euromonitor International.

Top 5 Retail Outlets for Other Pet Food in Japan, 2011



- Supermarkets/Hypermarkets
- Other Grocery Retailers
- Pet Shops/Superstores
- Other Non-Grocery Retailers
- Non-Store Retailing

Source: Euromonitor International.



► TRADE



- In 2011, Canada exported US\$13.99 million in dog and cat food to Japan, down 2.4% from the US\$14.33 million recorded in 2010, but up 25.2% from 2006. Canadian exports accounted for only 1.65% of Japan's total global imports in 2011.

Japan's Pet Food Trade, \$US Millions, 2006-2011

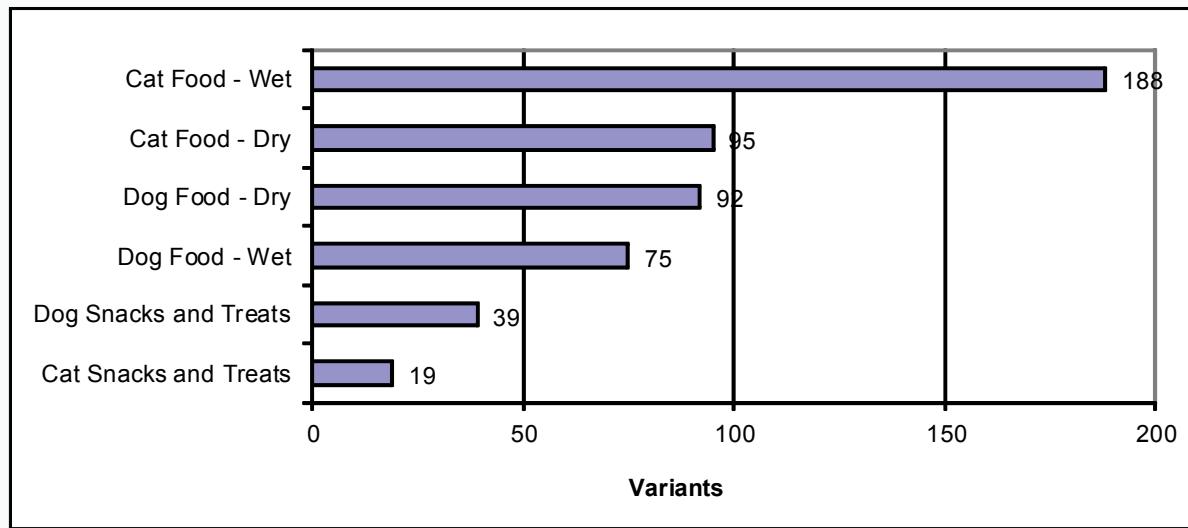
Commodity	2006	2007	2008	2009	2010	2011
Canadian Exports to Japan						
Dog and Cat Food	11.17	12.65	14.37	9.86	14.33	13.99
Bird Seed	0.04	0.04	0.04	0.04	0.03	0.00
Total	11.20	12.68	14.41	9.90	14.35	13.99
Japanese Imports from the World						
Dog and Cat Food	699.99	681.65	796.45	777.18	812.02	847.19

Source: Statistics Canada, February 2012.

► NEW PRODUCTS

- In 2011, 508 new pet food products were launched in the Japanese pet food market.
- Wet cat food was the most popular format, accounting for more than one-third of the launches (188), followed by dry cat food (95) and dry dog food (92).

New Pet Food Product Launches in Japan by Type, 2011



Source: Mintel.

► DOG FOOD



- ▶ Japanese dog food sales increased steadily throughout the 2006-2010 period (up 30.7%), reflecting growth across all categories of wet and dry food. However, some polarization can be seen in the market, as the largest growth took place in the economy and premium lines (increases for mid-priced foods were more modest, especially for dry food). Sales of treats were up 38.3% between 2006 and 2010.
- ▶ In 2011, the Japanese dog food market reached US\$2.68 billion, up 2.9% from the US\$2.65 billion recorded in 2010. Much of the growth can be attributed to increased sales of dog treats and premium/therapeutic dry and wet dog foods. Sales of dry dog food continued to surpass sales of wet dog food in 2011, by US\$1.37 billion; sales of wet dog food were relatively stable (up 0.3% from 2010 levels). Premium wet and dry dog food sales increased in 2011, by 1.9% and 4.8%, respectively. Dog treat sales rose by 2.9% in 2011.
- ▶ Dog food sales are forecast to decrease slightly through to 2016 (down 1.2%); dry dog food sales are expected to remain stable (up 0.1%), while wet dog food sales are forecast to drop by 5.2% during the 2012-2016 period. Despite these overall category trends, premium/therapeutic dry and wet dog food sales will continue to grow into 2016. Retail sales of dog treats are expected to drop by 2.5% over the period.
- ▶ One of the main retail channels for selling dog food is Japanese “non-grocery retailers” and, in particular, home improvement centres, which have diversified their product offerings. These do-it-yourself stores stock various consumer products, are located in suburban areas, and have large selling spaces. Another trend is the emergence of drugstores as an outlet for dog food, especially food for smaller dogs who are primarily owned by women.
- ▶ Mars Japan Ltd., with its Pedigree brand, holds the largest market share in the Japanese dog food market with 10.4% in 2010. Other large global chains, including Unicharm Pet Care Co Ltd., (Aiken Genki), Hill’s Colgate Japan Ltd., (Hill’s Science Diet), Nippon Pet Food Ltd., (Vita-One), and Iams Japan KK (Iams), each hold more than 5% of the market.

Dog Food Market Sizes in Japan – Retail Sales in US\$ Millions

	2006	2007	2008	2009	2010	2011	2012	2014	2016
Total Dog Food	2026.1	2033.2	2361.2	2599.8	2647.9	2683.9	2649.6	2641.1	2651.3
Wet Dog Food	291.9	291.1	334.7	369.3	372.3	373.4	365.1	356.9	353.9
Economy	33.7	33.2	37.7	41.7	42.3	42.7	42.0	41.7	42.0
Mid-Priced	185.5	184.5	211.4	231.3	231.5	230.2	223.2	214.7	210.0
Premium	72.8	73.5	85.7	96.3	98.6	100.5	99.9	100.5	101.9
Dry Dog Food	1329.0	1333.9	1551.4	1700.2	1723.6	1742.3	1719.6	1722.6	1743.5
Economy	198.1	198.0	228.0	255.3	253.0	249.5	241.7	236.6	236.0
Mid-Priced	588.5	587.0	680.6	722.4	704.3	690.2	661.5	628.2	606.3
Premium	542.4	548.9	642.8	722.5	766.2	802.6	816.5	857.8	901.2
Dog Treats and Mixers	405.2	408.1	475.1	530.4	552.1	568.2	564.9	561.6	553.9

Source: Euromonitor International.



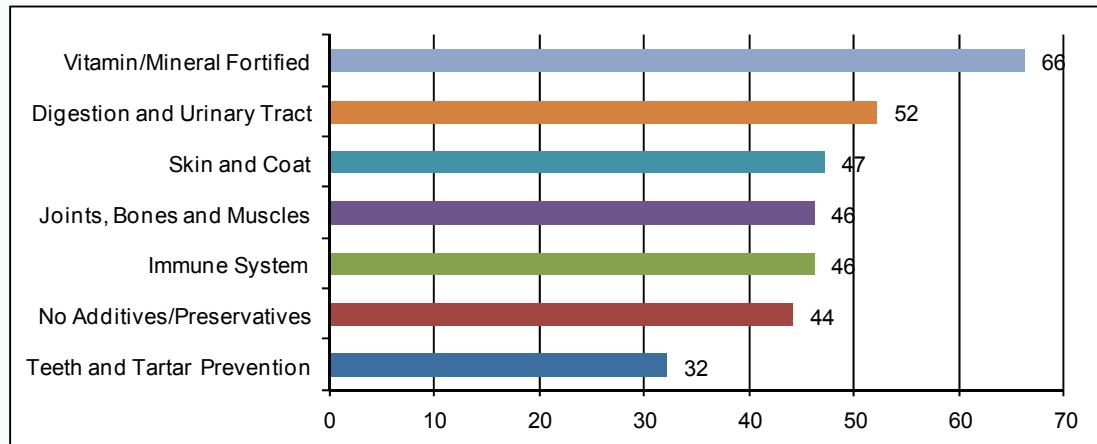
► DOG FOOD (continued)

Top 10 Dog Food Brand and Company Shares in Japan – Retail Sales % Breakdown

Brand	Company	2007	2008	2009	2010
Pedigree	Mars Japan Ltd	11.3	10.9	10.7	10.4
Aiken Genki	Unicharm Pet Care Co Ltd	6.3	6.8	6.6	6.5
Hill's Science Diet	Hill's Colgate Japan Ltd	5.8	5.8	5.9	6.0
Vita-One	Nippon Pet Food Ltd	5.6	5.5	5.6	5.5
Iams	Iams Japan KK	5.0	5.1	5.2	5.4
Petio	Yamahisa Pet Co Ltd	4.5	4.5	4.6	4.7
Gaines	Unicharm Pet Care Co Ltd	4.0	4.3	4.1	4.0
DoggyMan	DoggyMan Hayashi KK	3.6	3.7	3.9	4.0
Nisshin	Nisshin Pet Food Ltd	3.7	3.7	3.8	3.7
Gonta	Marukan Co Ltd	-	-	-	3.7

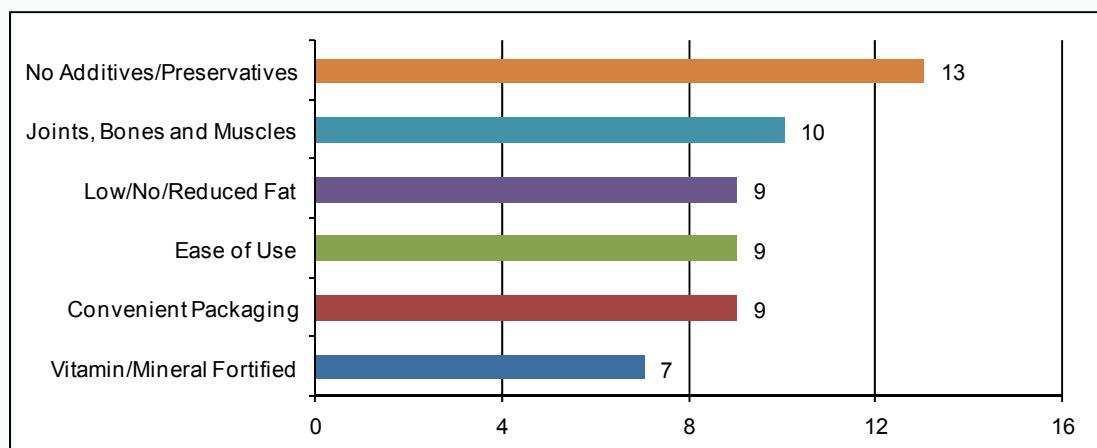
Source: Euromonitor International.

Top Claims for New Dry Dog Food Products in Japan, 2011



Source: Mintel.

Top Claims for New Wet Dog Food Products in Japan, 2011



Source: Mintel.



► DOG FOOD (continued)

NEW PRODUCT EXAMPLES



Beef and lamb with Brown Rice and Vegetables for Dogs Aged 11 and Up

Company: Mars

Brand: Cesar

Sub-Category: Dog Food Wet

Date Launched: March 7, 2011

Launch Type: New Variety Range Extension

Price in U.S. Dollars: \$1.32

Product Description

Wet dog food with four healthy vegetables. The product is available in a Beef and Lamb with Brown Rice and Vegetables variety, and retails in a 100 g pack.



Dog Food for Small Breeds

Company: Hill's Pet Nutrition

Brand: Science Diet Pro

Sub-Category: Dog Food Dry

Date Launched: April 1, 2011

Launch Type: New Product

Price in U.S. Dollars: \$14.47

Product Description

A food suitable for small breeds, for both puppies and mothers, formulated with high amounts of vitamin E and C, and antioxidants to support health and immune system. The kibbles are very small and also contain: quality protein for healthy muscle development and weight control; Eicosapentaenoic acid (EPA) for healthy bones and mobility; Docosahexaenoic acid (DHA) for healthy brain functions and eyes; and omega 3 and 6 fatty acids in a perfect balance for good skin and coat. It contains no added colorants, and is available in 800 g and 2 kg packs.



Dog Food for Adult Dogs

Company: Unicharm PetCare

Brand: Unicharm Aiken Genki Best Life

Sub-Category: Dog Food Dry

Date Launched: May 2011

Launch Type: New Product

Price in U.S. Dollars: \$4.08

Product Description

Dog food designed for adult dogs. It is enriched with vitamin E and vitamin C and helps support a healthy immune system. It contains beef, chicken fillet, yellow and green vegetables, and small, fish-flavoured grains. It retails in an 800 g pack. A 2 kg variety is also available.

Source for all: Mintel.



CAT FOOD

- ▶ Japanese cat food sales increased steadily throughout the 2006-2010 period (up 37.3%). Growth could be seen across all categories of wet and dry food, as was observed for dog food. Japanese consumers have also been shifting their cat food purchases from wet to dry forms which are viewed as being more nutritionally balanced and less expensive. Retail sales of dry cat food increased by 43.6% between 2006 and 2010 and now account for 59.6% of the market. Retail sales of wet cat food also increased, but at a slower rate than those of dry cat food (by 28.9% between 2006 and 2010). Also, within both the wet and dry formats, premium foods have been increasing in importance (by 41.2% and 47.5%, respectively over this period). Sales of treats also grew significantly (48%) over the period.
- ▶ In 2011, the retail value of the Japanese cat food market reached US\$1.78 billion, a slight increase (1.8%) from 2010. This is despite a decline in the domestic cat population from the peak of 10.89 million in 2008 to 9.28 million in 2011, and the aging of cats resulting in lower food consumption per animal, due in part to the shift towards higher-priced premium and therapeutic foods. Prepared cat food is expected to account for 57% of consumption in 2011, as it is viewed as being more convenient. However, some owners feel that a homemade meal shows more love and affection, and may supplement prepared food with homemade foods.
- ▶ Cat food sales are expected to fall by 4.8% over the 2012-2016 period. Sales of cat treats are expected to continue growing (up 46.1%) as consumers continue to pamper their pets. While sales of dry cat food are expected to remain virtually unchanged (down 0.9%), sales of economy and mid-priced dry foods are expected to fall by 6% and 7.9%, respectively, and sales of premium are expected to increase by 17.1%. Wet cat food sales are forecast to fall 11.9% over the 2012-2016 period. As was observed for dry food, sales of premium wet cat food are expected to increase (7.7%), while sales of economy and mid-priced foods will drop (18.4% and 20.1%, respectively).
- ▶ The retail cat food market is dominated by large companies, led by Nestle Purina Pet Care KK (Friskies) with 14% of the market in 2010. Consumers are switching to products with an emphasis on meeting their cats' specific health care/therapeutic needs. For example, in 2011, 312 new dry cat food products were launched and featured claims about vitamin/mineral fortification (75), digestion and urinary tract (47), skin and coat (27), immune system (23), and joints/bones/muscles (20). Also, with an increasing number of indoor cats, owners are increasing their demand for products that help prevent obesity and alleviate hairballs. New products with convenient packaging that are easy to use are also becoming increasingly popular, especially for wet food.
- ▶ Non-grocery retailers (home improvement centres and drug stores) are expected to maintain a 66% share of the retail value of cat food sales in 2011.

Cat Food Market Sizes in Japan – Retail Sales in US\$ Millions

	2006	2007	2008	2009	2010	2011	2012	2014	2016
Total Cat Food	1272.6	1285.0	1498.1	1700.4	1747.9	1779.3	1756.3	1727.4	1694.0
Wet Cat Food	542.8	541.4	623.2	696.8	699.4	701.9	682.8	651.4	618.1
Economy	97.9	96.1	108.6	118.9	117.9	116.7	112.0	103.7	95.2
Mid-Priced	310.1	309.1	355.5	398.9	391.1	385.7	368.5	338.3	308.1
Premium	134.8	136.3	159.1	179.0	190.4	199.5	202.4	209.4	214.8
Dry Cat Food	719.7	733.3	862.9	989.8	1,033.4	1,060.9	1055.9	1055.5	1051.8
Economy	104.5	104.8	121.2	136.1	141.4	144.2	142.3	139.5	135.6
Mid-Priced	430.2	439.4	518.5	599.0	619.1	628.2	617.4	600.0	578.5
Premium	184.9	189.1	223.3	254.8	272.8	288.5	296.1	316.1	337.7
Cat Treats and Mixers	10.2	10.3	12.0	13.7	15.1	16.5	17.6	20.5	24.1

Source: Euromonitor International.

► CAT FOOD (continued)

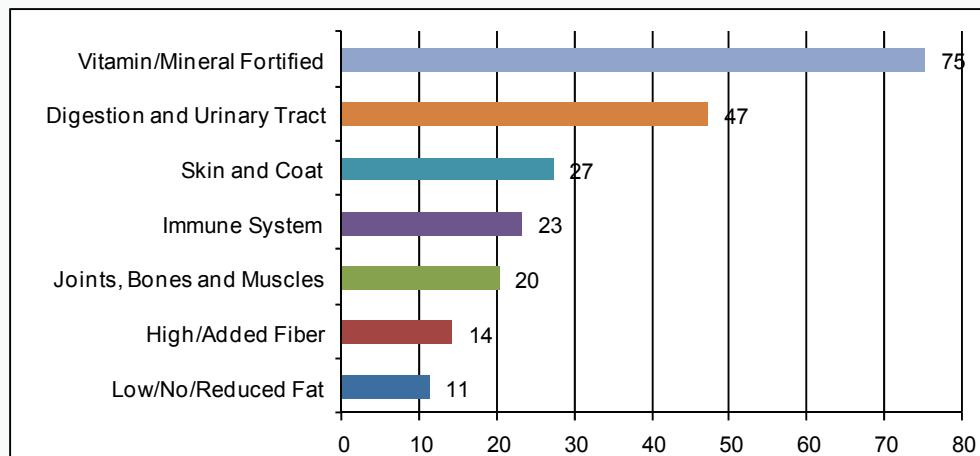


Top 10 Cat Food Brand and Company Shares in Japan – Retail Sales % Breakdown

Brand	Company	2007	2008	2009	2010
Friskies	Nestle Purina Pet Care KK	13.4	13.4	13.6	14.0
Nisshin	Nisshin Pet Food Ltd	9.6	9.7	9.8	9.4
Neko Genki	Unicharm Pet Care Co Ltd	8.3	8.5	8.6	9.0
Hill's Science Diet	Hill's Colgate Japan Ltd	5.6	5.7	5.7	5.9
Kal Kan	Mars Japan Ltd	4.7	4.5	4.5	4.6
Sheba	Mars Japan Ltd	3.8	3.8	3.9	4.0
Canet	Pet Line Corp	4.3	4.3	4.3	3.6
Kurokan	AIXIA Corp	3.1	3.0	2.9	2.9
Royal Canin Veterinary Diet	Mars Japan Ltd	2.7	2.7	2.7	2.8
Mimy	Nippon Pet Food Ltd	2.5	2.5	2.5	2.5

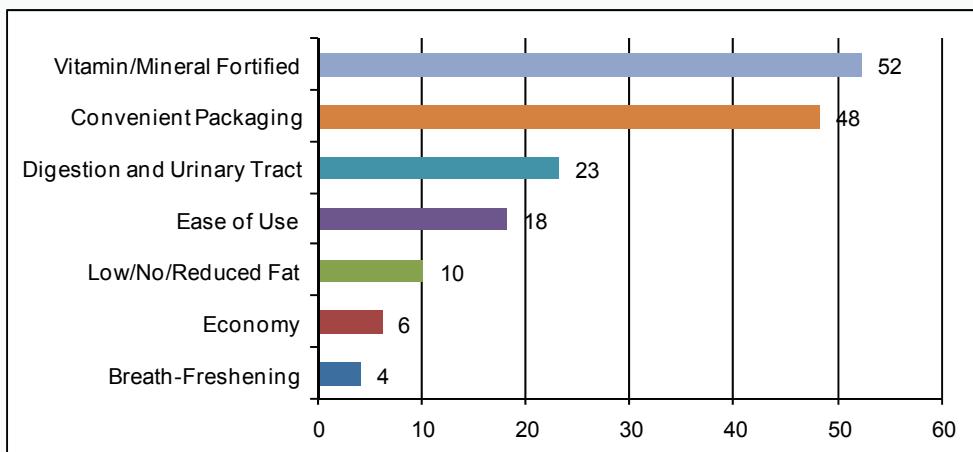
Source: Euromonitor International.

Top Claims for New Dry Cat Food Products in Japan, 2011



Source: Mintel.

Top Claims for New Wet Cat Food Products in Japan, 2011



Source: Mintel.

► CAT FOOD (continued)



NEW PRODUCT EXAMPLES



Tuna in Soup for Cats Aged 11 and Up

Company: Nestlé Purina PetCare

Brand: Purina Friskies Cup

Sub-Category: Cat Food Wet

Date Launched: March 1, 2011

Launch Type: New Product

Price in U.S. Dollars: \$0.99

Product Description

A complete nutrition wet food for cats, available in an injury-proof, easy-open plastic cup. The product is formulated with vitamin E and DHA.



Rosa Cat Food

Company: Nisshin Pet Food

Brand: Kaiseki Deliciolé

Sub-Category: Cat Food Dry

Date Launched: September 1, 2011

Launch Type: New Product

Price in U.S. Dollars: \$5.98

Product Description

Kaiseki Deliciolé Rosa Cat Food is made with roasted brown rice in the centre and coated in cod, bonito flake, and snapper powders. The vitamin enriched product is topped with shrimps and is low in magnesium to prevent struvite and feline lower urinary tract disease. It is also designed for digestive health. It retails in a pack containing 10 x 25 g aluminium packets.



Fish in Gravy (Tuna and Bonito)

Company: Unicharm PetCare

Brand: Unicharm Neko Genki

Sub-Category: Cat Food Wet

Date Launched: May 2011

Launch Type: New Variety/Range Extension

Price in U.S. Dollars: \$1.18

Product Description

Cat food designed for senior cats aged 15 years and above. It is enriched with potassium, vitamin E and vitamin B and contains oligosaccharide to support a healthy digestive system.

► OTHER PET FOOD



- ▶ Other pet food includes small mammal, reptile, fish, and bird food. Sales of other pet food increased from US\$216.5 million in 2006 to US\$285.5 million in 2010, an increase of 31.9%. Over this period, the population of pet birds fell, while populations of fish, small mammals and reptiles rose.
- ▶ In 2011, populations for all types of “other” pets fell from 2010 levels, reflecting a general lack of consumer interest in these pets. The number of pet birds, however, has fallen for a number of years (down 37.3% since 2006) due to continued import restrictions and the ongoing concern about Avian (bird) flu in many Asian countries. Retail sales of other pet food were US\$295.3 million in 2011, up slightly from the previous year, and reflected increases in fish (4.2%) and small mammal/reptile (5.9%) food sales.
- ▶ Retail sales of bird and fish food are expected to fall by 25.1% and 4.3%, respectively between 2011 and 2016, while small mammal/reptile food sales are expected to continue to increase (up 14.6%). Overall, other pet food sales are forecast to increase 2.2% over the period.
- ▶ Pet shops/superstores are the leading source of “other” pet foods, accounting for 54% of sales in 2011. Other non-grocery retailers (home improvement centres) account for a further 41% of sales. Two companies led sales of other pet foods, namely Kamihala Fish Industry Ltd. (13.4% of retail sales), and Specturm Brands Inc. (11% of retail sales), under the brand names Hikari and Tetra. Pets Ishibashi Co. Ltd. remains the leading player in the bird food market.



Other Pet Food Market Sizes in Japan – Retail Sales in US\$ Millions

	2006	2007	2008	2009	2010	2011	2012	2014	2016
Total Other Pet Food	216.5	212.2	240.3	266.3	285.5	295.3	295.9	299.4	301.8
Bird Food	43.0	39.5	41.9	44.5	46.5	43.8	40.5	35.9	32.8
Fish Food	70.9	70.5	80.8	90.8	97.6	101.7	101.5	100.4	97.3
Small Mammal/Reptile Food	102.6	102.2	117.5	131.0	141.4	149.8	153.8	163.2	171.7

Source: Euromonitor International.

Top 10 Other Pet Food Brand and Company Shares in Japan – Retail Sales % Breakdown

Brand	Company	2007	2008	2009	2010
Hikari	Kamihala Fish Ind. Ltd	12.8	13.1	13.3	13.4
Tetra	Spectrum Brands Inc	10.6	10.8	10.9	11.0
Marukan	Marukan Co Ltd	5.1	4.7	4.6	4.6
Pets Ishibashi	Pets Ishibashi Co Ltd	3.7	3.7	3.5	3.5
Nippai	Nippon Haigo Shiryo Co Ltd.	3.9	3.6	3.4	3.4
Yoshida	Yoshida Shiryo Ltd.	3.2	3.2	3.2	3.2
Natural Foods	Natural Foods Co Ltd.	2.4	2.3	2.2	2.1
Cornet	Itosui Co Ltd.	1.3	1.4	1.4	1.4
Isuta	Isuta Co Ltd.	1.0	1.0	1.0	1.0
Angel	Nippon Pet Food Ltd.	0.9	0.8	0.9	0.8

Source: Euromonitor International.

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.

Consumer Trends: Pet Food in Japan

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