

Voluntary Report – Voluntary - Public Distribution

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Report Name: Purr-Plexed in Indonesia on Pet Food

Country: Indonesia

Post: Jakarta

Report Category: Livestock and Products, Grain and Feed

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Report Highlights:

In Indonesia, the pet food market (especially for cats) has seen remarkable growth, increasing 24.5 percent to reach \$237 million in 2023. To gain insight into this promising product category amid reduced market share for U.S. pet food, FAS Jakarta partnered with Food Export Midwest/Northeast and a prominent consultant. The attached report includes an in-depth survey and market intelligence related to Indonesian pet food production, supply, distribution, and policy. In addition, while not directly analyzed in this report, FAS Jakarta also sees opportunities for exports of U.S. pet food ingredients, including corn, chicken meal, corn gluten meal, soybean meal, and fish meal to fuel the Indonesian pet food manufacturing industry.

Market size: Indonesia’s imports of pet food (under HS Code 2309, “Preparation of a Kind Used in Animal Feeding”) from all sources has been increasing over the years. In 2022, the value was recorded at \$435 million, an increase of 31.4 percent from \$331 million recorded in 2018. The Covid-19 pandemic played a role in increasing the demand for pet food since it forced most of the population to stay home and encouraged them to adopt four-legged family members to reduce boredom. The Indonesian veterinary drugs producers’ association reported that pet shops significantly grew to reach a total of 1,800 legal brick and mortar stores in 2023 while at the same time illegal sales of veterinary drugs on marketplaces also grew. This situation emphasizes the need of a clear legal umbrella and appropriate policy action.

U.S. market share: While demand for pet food in Indonesia has continued to increase, the U.S. market share has declined. From 2011 to 2024, U.S. animal feed preps (HS Code 2309) reduced 70 percent to \$44 million. The primary competitor is Thailand, which benefits from tariff preferences, reduced prices, and shorter lead time.

Report purpose: In partnership with Food Export Midwest/Northeast, FAS Jakarta hired a prominent consultant to conduct an in-depth pet food market survey. This report seeks to outline the Indonesian pet food market situation related to the production, distribution, consumption, and trade as well as the Government of Indonesia policy and regulations related to the sector. The market survey is intended to identify opportunities and challenges for U.S. pet food ingredients and pet food end products so that U.S. pet food can contribute to the growing Indonesian pet food industry.

Attachments:

[Pet Food Market Brief - Attachment in PDF.pdf](#)