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Prepared By: Ornkamol Puranabhandu

Approved By: Adam Branson

Report Highlights:

Thailand's pet food market is growing rapidly, fueled by pet humanization, premiumization, rising cat ownership, and a thriving e-commerce sector. Valued at $1.6 billion in 2024 and projected to reach estimated $2.2 billion in 2025, the market is driven by demand for human-grade pet food, functional products, and seamless omnichannel shopping. To regain market share, U.S. brands should focus on niche, science-driven products that meet Thai consumers' preference for hyper-premium, health-focused pet nutrition.

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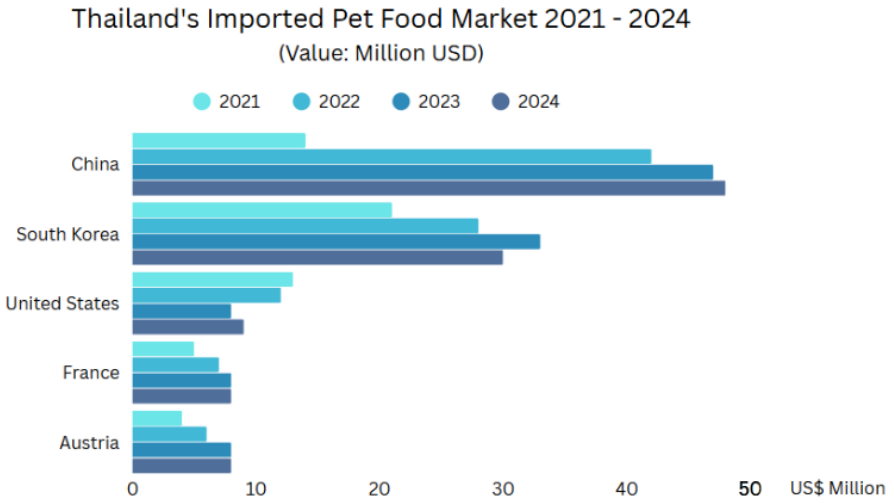
Thailand’s Pet Food Market

Thailand's pet food market has demonstrated a remarkable growth in 2025, driven by pet owners’ commitment to their pets’ well-being. In 2024, Thai consumers spent an estimated $1.6 billion on commercially prepared pet food, of which $1.3 billion was specifically for dog and cat food. Statista projects the Thai pet food market will reach $1.8 billion in 2025, with a 10 percent annual growth rate through 2030.

In 2024, imported pet food accounted for approximately $122 million or 9 percent of Thailand's total pet food market, with domestic producers supplying the rest. The value of imports has doubled since 2021, when it was $66 million. In 2024, China dominated Thailand's imported pet food market with a 39 percent share, followed by South Korea at 24 percent. The United States ranked third at 7 percent of imports. The value of U.S. imports fell from $12.7 million in 2021 to $8.7 million in 2024 due to the overwhelming dominance of Thai pet food manufacturers, who now compete aggressively in the “super premium” sector. Additionally, U.S. brands face competition from China, whose market share surged from just 3 percent in 2020 to a commanding 39 percent, challenging the key value propositions of U.S. products with competitive pricing and tariff-free wet food options. U.S. brands present in the Thai pet food market include Hill’s Science Diet, Taste of the Wild, Instinct, Earthborn Holistic, Solid Gold, AvoDerm, Pinnacle, and Pro Pac.

Chart 1. Thailand: Imported Pet Food Market Values by Supplier



Source: Trade Data Monitor

Thailand is a significant player in the global pet food export market. In 2024, the country exported $2.7 billion worth of dog and cat pet food, securing its position as the second-largest global exporter behind Germany, which led with $3.3 billion in exports (12.3 percent market share), and ahead of the United States, which recorded $2.5 billion in exports (9.4 percent market share). Prominent Thai manufacturers include i-Tail Corporation, Perfect Companion Group (SmartHeart, Me-O), Asian-Agribusines (Hajiko, Monchou), Charoen Pokpand Food of CPF (JerHigh, SmartHeart), Hi-Q Food Products (Felina Canini),

and others. These companies export a variety of dog and cat food products, including dry food, wet food, and treats, to markets across Asia, the United States, and Europe. Many of these manufacturers also produce pet food for global brands under private-label agreements or serve as Original Equipment Manufacturers (OEM), allowing international companies to sell these products under their own branding.

Pet Humanization

A growing number of Thai pet owners treat their pets as essential family members, cherished companions or even surrogate children. Consequently, Thai pet owners are increasingly willing to invest more in high-quality products and services to support the pets' well-being. This trend is particularly pronounced in urban areas like Bangkok, where 37 percent of households own pets. The rise of smaller family units and single-person households has positioned pets as essential sources of emotional support. The COVID-19 pandemic further accelerated this dynamic, as extended periods of remote work and lockdowns fostered deeper bonds between owners and their pets. As a result, owners are increasingly prioritizing premium pet products and services.

Examples of this shift are evident in the growing pet-friendly infrastructure across Thailand. Since mid-2024, pets have been allowed on Bangkok's Airport Rail Link, reflecting a broader societal embrace of pets in public spaces. Additionally, major developers like Sansiri are integrating pet-friendly features into their residential projects, moving beyond simply allowing pets in condominiums to create entire communities designed for pet-inclusive lifestyles. These developments include dedicated green spaces, pet restaurants, and even weekend workshops for pets, catering to the modern Thai pet owner's desire for a fully integrated lifestyle.

The Rise of Cat Population

While dogs historically were the primary pet species, cats are rapidly closing the gap, with their numbers estimated to have grown at an average of 28 percent annually between 2021 to 2024, nearly twice the pace of pet dog growth. This surge is heavily influenced by rapid urbanization, as cats are seen as well-suited for smaller living spaces like condominiums, which are increasingly prevalent in Thai cities. Kasikorn Research Centre projects 1.94 million domesticated cats in Thailand by 2025 and 3.45 million pet dogs. The rise in feline pets has led to a dynamic shift in product offerings, with the mid-priced cat food segment emerging as key growth area for 2025.

Prominent cat food brands, such as Me-O, Whiskas, Purina ONE, Felix, and Monchou, thrive by successfully balancing perceived higher quality ingredients and nutritional benefits with an accessible price point. The intense competition within this mid-range segment has also spurred notable innovation, leading to a wider variety of specialized formulas catering to diverse needs.

Premiumization

Consumers are increasingly looking for higher-quality, natural, and specialized pet food options. Premiumization has become standard, with over half of all pet food spending focused on premium products, driven by owners seeking superior quality and nutrition for their pets. This pervasive movement sees consumers demanding the same wellness, culinary sophistication, and sustainability standards for their pets as they do for their own meals. This shift means a focus on “human-grade” ingredients, like JerHigh’s “real chicken meat” claim, and innovative high-tech products, such as Kelly & Co’s freeze-dried raw food, which leverages baby food technology. There is also a strong demand for functional foods for wellness and longevity, with owners seeking benefits for gut health, joint care, and even mental well-being. This fuels new products with novel protein (insect, MSC-fish) and life-stage specific formulas, similar to human nutrition. Brands driving this trend include Felina Canino & Felina Canino VIF, JerHigh, Kaniva, Monchou, Perfecta, Lifemate, Pawdy, etc.

Manufacturers focus on human-inspired products and marketing strategies that leverage emotional connections. Commanding a hefty price premium, Mars’ Sheba Perfect Portions exemplifies this trend with its gourmet treats and wet food with “clean label” ingredients, or portion-controlled offerings. Local manufacturing giants, such as Thai Union’s i-Tail, have shifted their focus from traditional tuna blends to more sophisticated products like chef-style mousse caps and innovative pet food offerings. Importantly, regulatory updates, including the adoption of human-grade GMP/HACCP standards by Thailand’s Department of Livestock Development (DLD), reinforce this premiumization trend by ensuring product quality and boosting consumer trust.

Beyond the major leading manufacturers in the pet food industry, a growing number of small, local brands are carving out a niche by positioning their products as gourmet or ultra-premium options. These brands emphasize high-quality ingredients, unique recipes, and personalized care for pets, appealing to discerning pet owners seeking alternatives to mass-market offerings. They not only focus on functionality but also prioritize appearance, crafting pet food that resembles human food, such as cakes, ice cream, snacks, and other visually appealing treats. Small ultra-premium local brands include Dogster Food, Pawdy, Moochie, Monchou, Bone & Raw, and Hoya Barkery.

The Silver Pet Economy

As Thailand confronts the demographic reality of an aging human population, a parallel shift is occurring within its pet households, giving rise to the "Silver Pet Economy." With pets living longer due to better care, there is a massive, underserved demand for senior-specific pet products focused on longevity and quality of life. This trend is driving a spike in specialized "medicinal" nutrition, moving beyond standard senior formulas to functional solutions. Key growth areas include high-calorie soft mousses and purees designed for older pets with dental issues or appetite loss, as well as cognitive support supplements to address dementia. Furthermore, there is increasing traction for functional treats enriched with glucosamine and chondroitin to manage joint health. For manufacturers, this signifies a

shift toward the "medicalization" of pet food, where diet is increasingly viewed as a primary tool for geriatric management.

E-Commerce and Omnichannel Strategies Drive Sales

Digital platforms increasingly integrate online and offline experiences as consumer purchasing habits shift. Globlex Securities projects the value of Thailand's 2025 pet food market to reach $1.82 billion, with e-commerce alone accounting for approximately $600 million, reflecting a robust 20 percent year-on-year growth in online sales. Although e-commerce accounts for just over a tenth of total pet food sales, its rapid growth is fueling the development of an integrated omnichannel retail system that seamlessly combines digital platforms with physical shopping experiences, making it easier for consumers to access pet food products.

Key trends shaping this evolution include the rise of quick commerce (Q-commerce), exemplified by services like GrabMart, which deliver pet food in as little as 25 minutes to meet consumer demand for instant gratification. Kasikorn Research Centre’s data highlights a 42 percent spike in dog and cat food purchases during the 6-to-8 p.m. "feed-the-fur-kids" window, emphasizing the importance of immediate fulfillment. Strategic online-offline integration is also redefining the market, with major retailers like Pet Lovers Centre using their network of over 50 Bangkok stores as "micro-fulfillment hubs" for same-day delivery and Click & Collect options. Betagro's PET Club enhances this approach by unifying loyalty points across in-store, online, and pop-up vet clinic purchases, driving digital engagement while boosting foot traffic. Online retailers like TailyBuddy are scaling operations with competitive pricing and nationwide next-day shipping. Meanwhile, automation and self-service are gaining traction, with JerHigh (CPF Foods) piloting automatic dog-treat vending machines in Bangkok malls and planning broader rollouts in transit hubs and condo lobbies. This shift signals vending as an emerging distribution channel, further supported by the recent ASEAN Vending & Self-Service Expo in September 2025. Together, these developments illustrate that Thailand's pet food market is no longer defined by an online-vs.-offline divide but by a race to create a seamless "any-time, any-place" experience, enabling pet owners to effortlessly replenish premium diets through the most convenient channel, both online and offline platform.

U.S. Imported Pet Food Products

Thailand offers significant opportunities for U.S. pet food brands, driven by Thai pet owners’ growing preference for premium nutrition and the rapid expansion of online shopping, which is growing at 20 percent annually. However, challenges persist. Imported U.S. pet food faces a 9 percent import duty, lengthy freight routes, and strict Thai GMP/HACCP compliance requirements, which include audits. Additionally, many U.S. brands, such as Mars and Nestlé Purina, have local production, while Chinese wet food pouches enter tariff-free and compete aggressively on price.

To succeed in this competitive market, U.S. brands should focus on niche, science-driven products like specialized diets, functional treats, innovative formulations, and high-margin specialties such as freeze-

dried meals, insect protein treats, and vet-prescribed diets. These products align with Thai consumers' demand for hyper-premium, health-focused pet nutrition. Avoiding the saturated bulk kibble segment and leveraging Thailand's expanding omnichannel retail network is key.

As U.S. brands navigate price sensitivity in the complete diet market, a strategic "entry point" lies in the growing trend of meal customization. Thai pet owners are experiencing "kibble fatigue" and increasingly seek high value "toppers" such as broths, freeze-dried sprinkles, and wet food pouches to enhance standard dry diets. For U.S. exporters, this category offers a tactical advantage: products that might be prohibitively expensive as a complete daily diet are viewed as affordable, high-quality luxuries when sold as toppers. Promoting these items allows U.S. brands to leverage their reputation for premium quality without forcing consumers to commit to the high cost of a full imported feeding regimen.

Platforms like Lazada, Shopee, and Grab are essential for meeting urban consumers' expectations for convenience and fast delivery. By integrating into this ecosystem, U.S. brands can enhance accessibility, address logistical challenges, and position themselves as leaders in innovation, quality, and convenience.

Additional Opportunities in Pet Food Marketing
Pet Fair SEA 2026
Date: October 28-30, 2026
Venue: Bangkok International Trade & Exhibition Center

Pet Food Policy Considerations
Prior to exporting pet foods and related products to Thailand, U.S. exporters should confirm registration requirements including labels and claims, permitted ingredients, durability tests, etc. with their importers to ensure compliance with local regulatory authorities. U.S. exporters should understand that these processes can be lengthy but USDA personnel in Thailand are able to support and facilitate various aspects of the registration process and engagements with local officials.

In addition, U.S. pet food exporters may contact AgBangkok@usda.gov with any questions and for conversations about Thailand's pet food market and the expanded opportunities for U.S. food and agricultural products as both finished goods or as ingredients for the local pet food manufacturing industry.

Attachments:

No Attachments.