

UNDERSTANDING PETS CATEGORY IN INDONESIA MARKET

July 2026



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CATS & DOGS ARE INDONESIAN'S FAVORITE PETS?

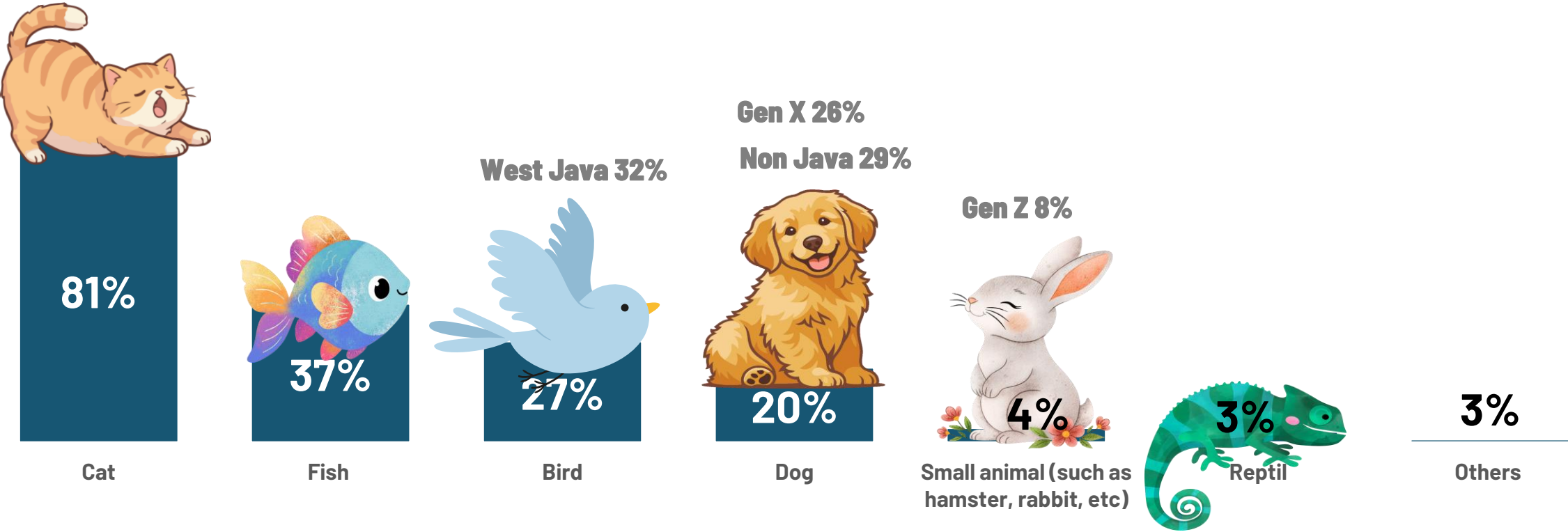


4 out of 5

Indonesian are owning Pets

What are their favorites?

The top favorite pets are Cat, Fish, Bird, and followed by Dog. Pet owners tend to have around 1 – 2 pets in their house



Average: 1.7

A woman with dark hair and orange nail polish is sitting and interacting with a ginger and white tabby cat. The cat is sitting upright on a wooden surface, looking up at the woman's hand. The background is a soft, out-of-focus indoor setting.

58%

Own it for more than 3 years



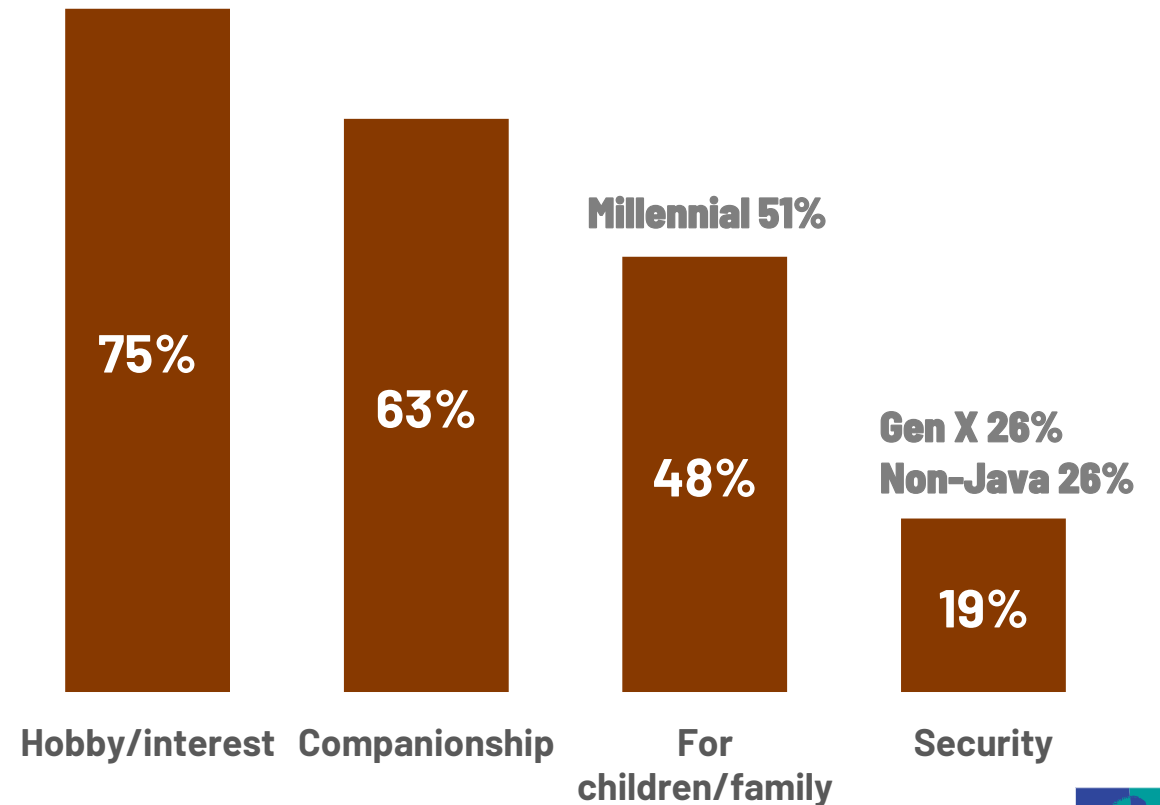
47% own it for 1 – 3 years

Length of ownership

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Hobby and companionship are reasons for owning the pets. For security seen higher among Gen X and Non-Java



Motivation of owning

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The Unstoppable Rise of Paw Parents & Petfluencers on Social Media

Pets are no longer just being posted, they are becoming social media personalities.

The trend highlights how pets are increasingly **positioned as family members and lifestyle companions**, while also opening opportunities for content creation, community engagement, and brand partnerships.

The trend highlight More pet owners are **creating dedicated accounts** and turning their pets into **petfluencers**, reflecting the growing role of **pets as both family members and lifestyle content drivers**.



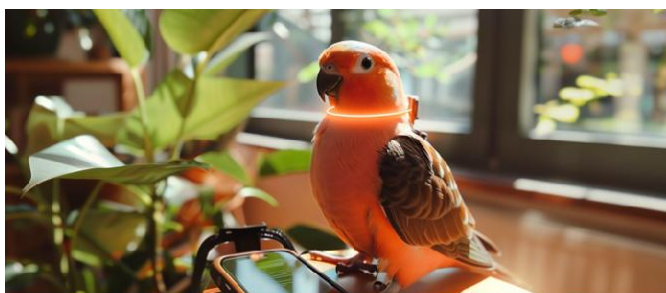
Shifts: How will our relationship with pets inform purchase behaviors?

NOW: From family pet to part of the family



Our human-pet bond is reflected in heavy spending on pet care, premium products and specialized services. However, human and animal needs are distinct. Pets primarily fulfill an emotional role.

NEXT: From human alternatives to just for pets



Pet tech will become more sophisticated, enabling deeper understanding of animal needs and hyper-personalized care. Pet-centric spaces and services will expand, integrating pets more seamlessly into daily life. Focus will shift into animal wellbeing and mental health, customizing care for happier pets.

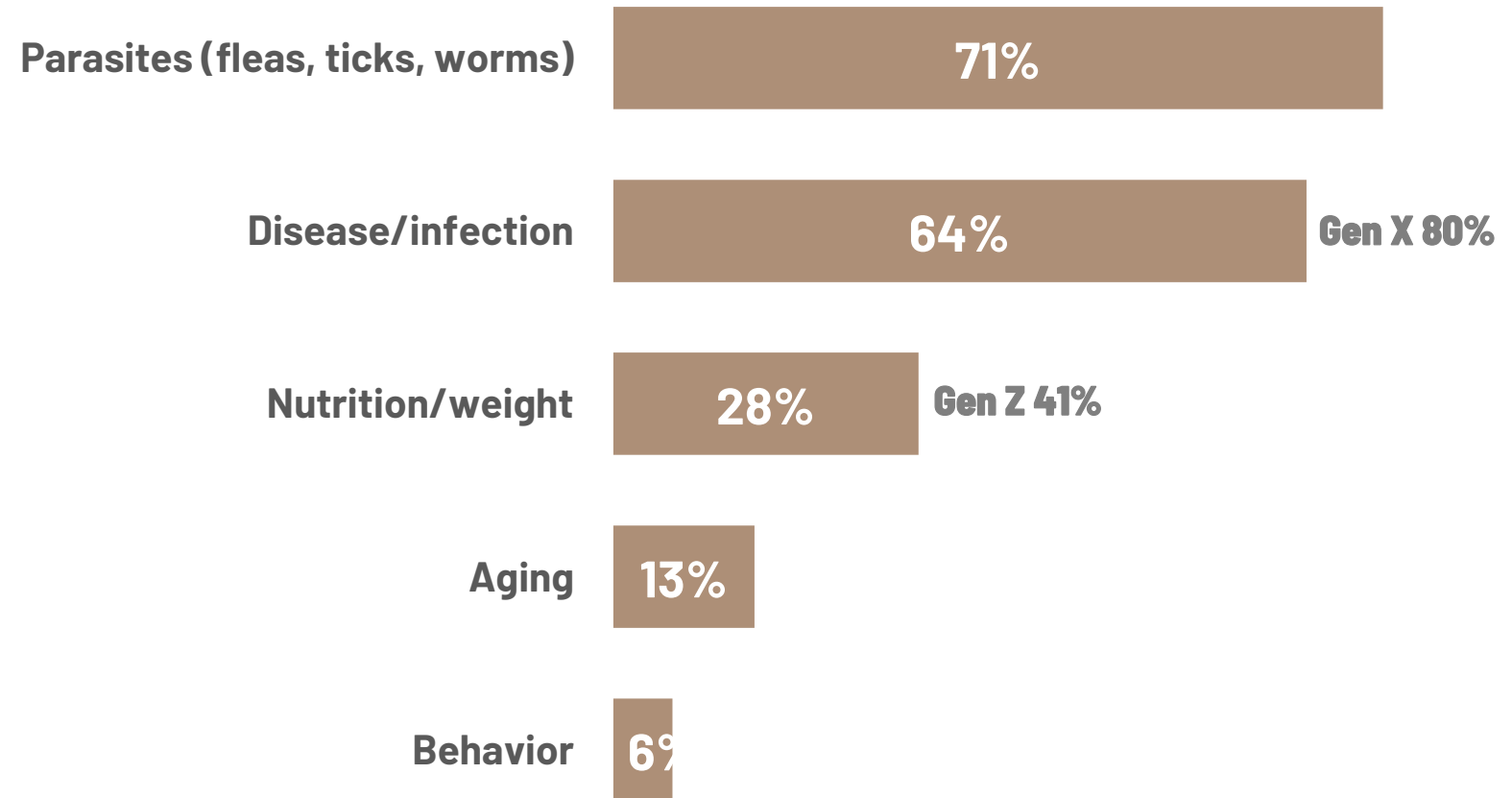
FUTURE: From companions to equals



Pets may achieve near-human status in some societies, spurring an evolution in legal and ethical frameworks. Advanced technology may enable interspecies communication. This integration will raise complex questions about animal rights and the very definition of family.

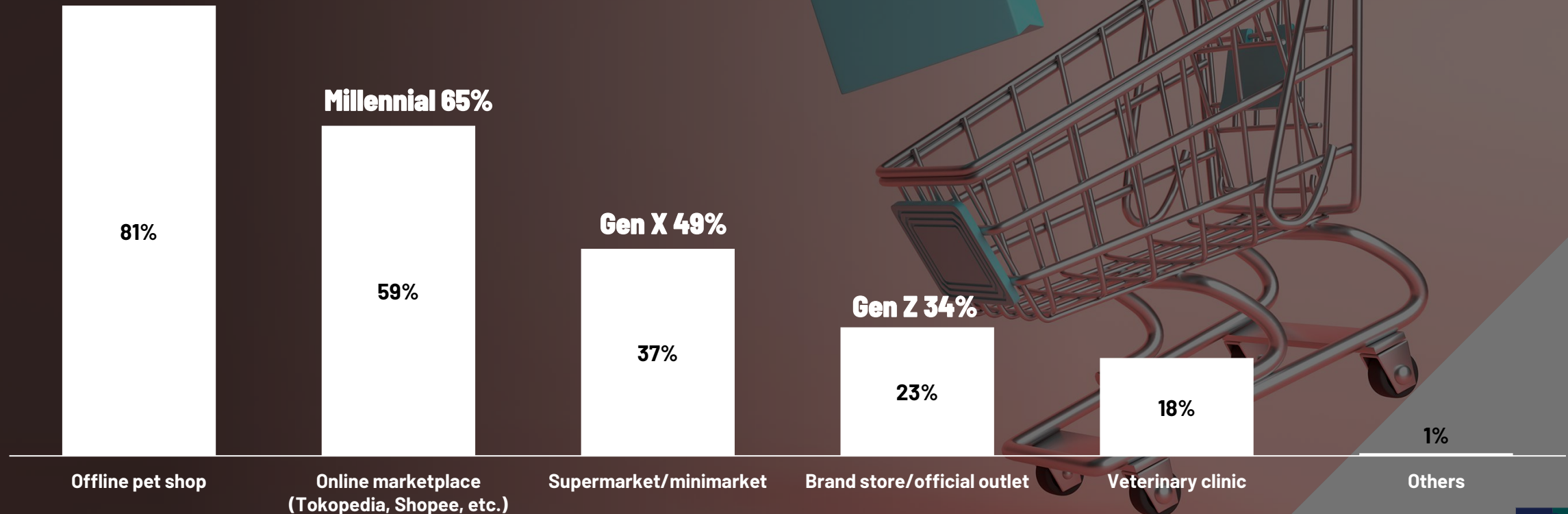


Parasites comes as main health concern for pets. Gen X concerns more on diseases/infection. While Gen Z more cautious on Nutrition issues



Health Concern

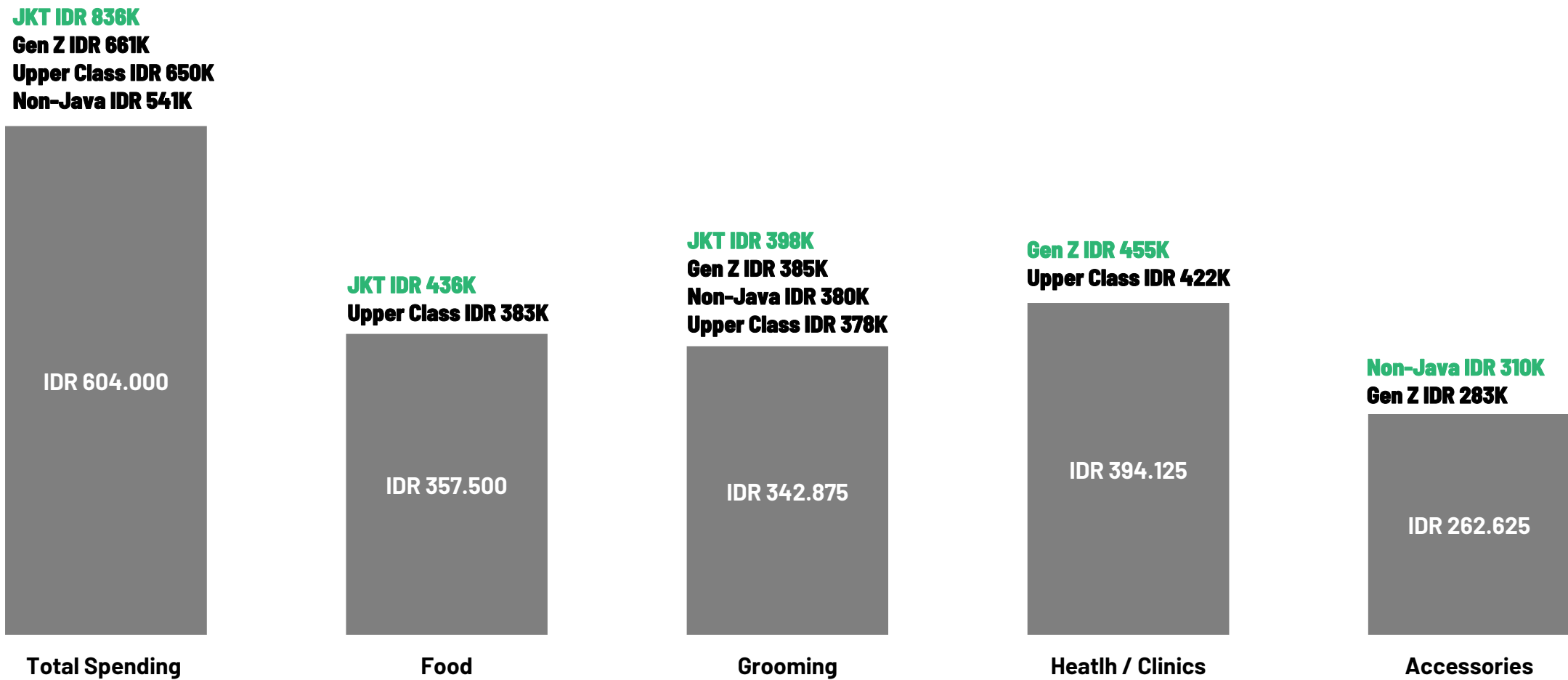
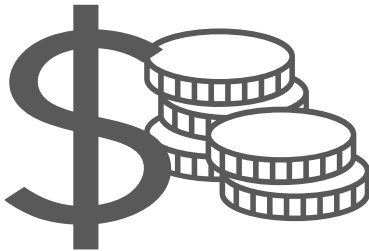
Pet shop still popular place to purchase pet supplies / foods, marketplace are preferred more among Millennial. While official store / outlet are preferred more among Gen Z



Place of purchase

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Pet owners are willing to spend more on their pet health, and less for accessories. Jakarta Pet owners spend more on food, while Gen Z & upper class spend more on health



IS THE SPENDING IMPACTED BY INDONESIA MARKET CONDITION?

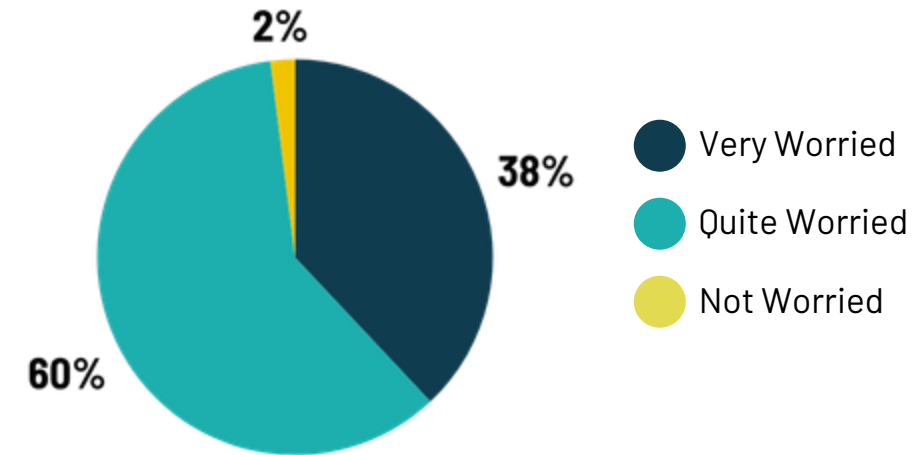


2 out of 5

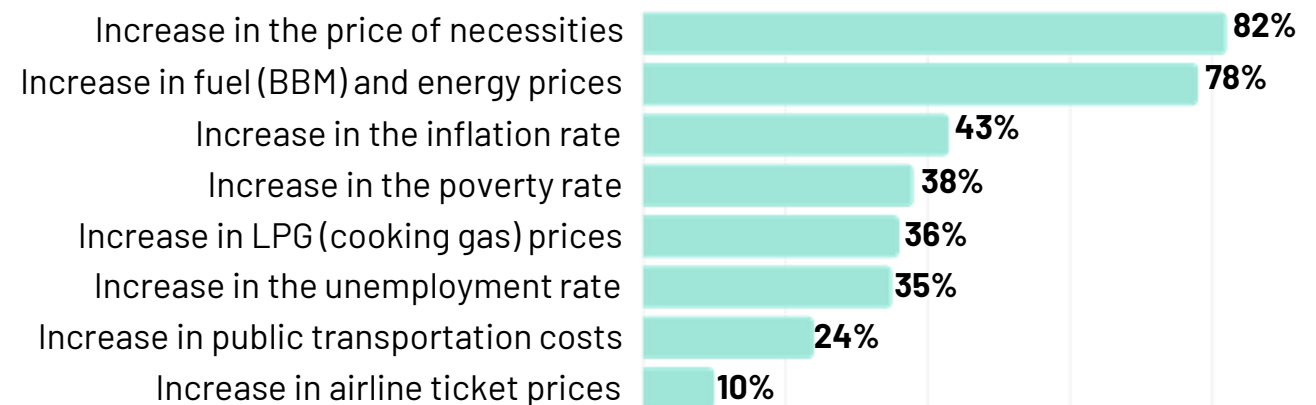
Indonesian consumers are **very worried** over the existing Iran conflict.

82% Worried About Price Surges

Indonesian Current Concern Level Amidst the Iran Conflict



Indonesian Current Top Concern

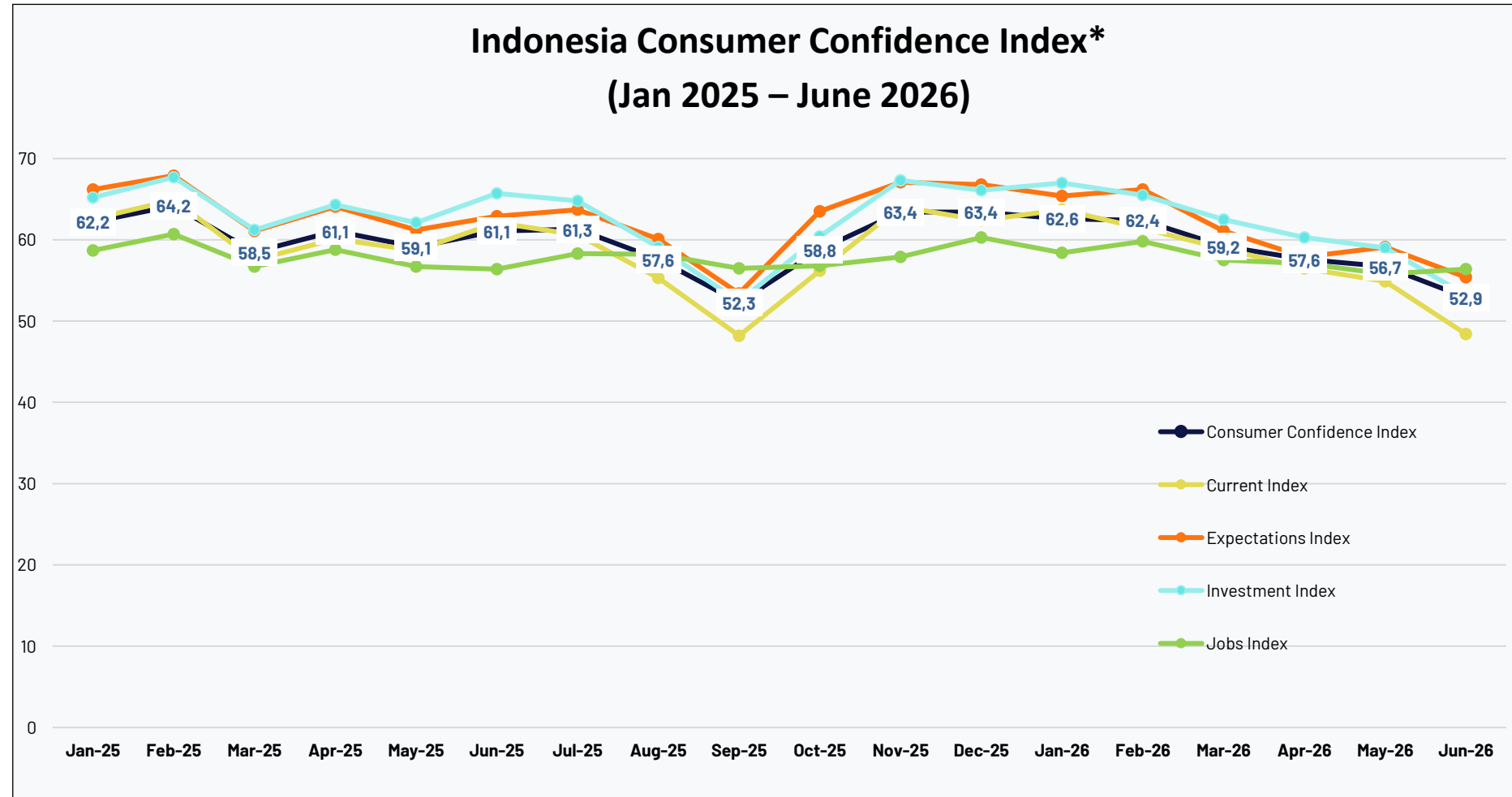


Consumer confidence continues to weaken, signalling a more cautious and defensive financial mindset



**Consumer Confidence Index is based on Ipsos Global Consumer Confidence Index Survey conducted monthly in 30-country.*

Indonesians are concerned about the current and future personal financial situation which is leading to a steep decline in Consumer Confidence Index



Current: Current personal financial situation, local economy, employment

Expectation: Expected future personal financial situation, local economy, employment

Investment: Purchasing and investment confidence, personal financial situation and outlook

Job: Job security confidence, job loss experience, employment outlook

**Consumer Confidence Index is based on Ipsos Global Consumer Confidence Index Survey conducted monthly in 30-country.*

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Across categories, consumers protect essentials, moderate lifestyle spending, and postpone big-ticket purchases

No Changes vs Cancellation Purchase Behaviour in respective category

No Changes on Spending Plan:

Vehicle-Gasoline	42%
FMCG	36%
Smartphone & Electronics	36%
Vehicle-EV	25%
Travel	12%
Lifestyle-Fashion	12%
Tourism	12%
Lifestyle-Eating Out	7%

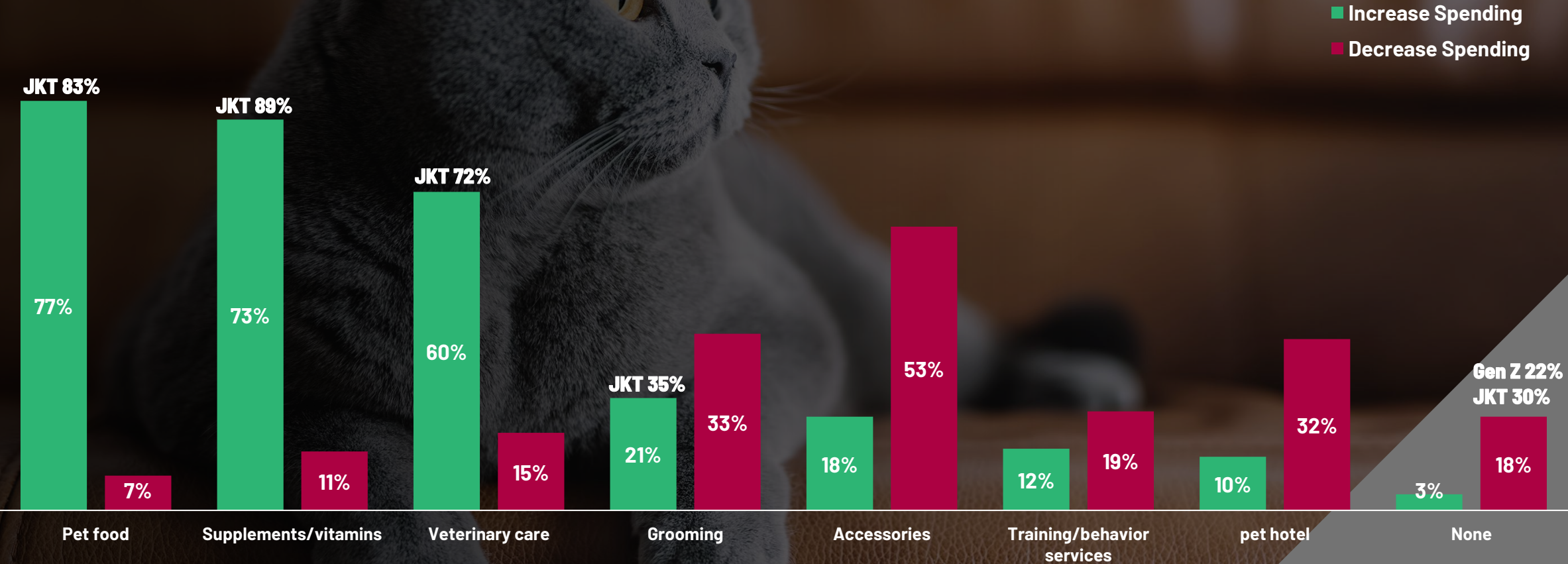
Plan to Cancel the Purchase:

Travel	30%
Tourism	30%
Vehicle-EV	22%
Smartphone & Electronics	22%
Lifestyle-Eating Out	18%
Vehicle-Gasoline	14%
Lifestyle-Fashion	10%
FMCG	4%

Does it apply the same in pets categories ?

Travel: Flight/ Hotel Booking. Tourism: Domestic/ International tourism.

Pet owners are willing to spend more on the essentials categories and reduce spending on less importance categories. Interestingly, almost 2 out 10 pet owners are keeping their spending budget



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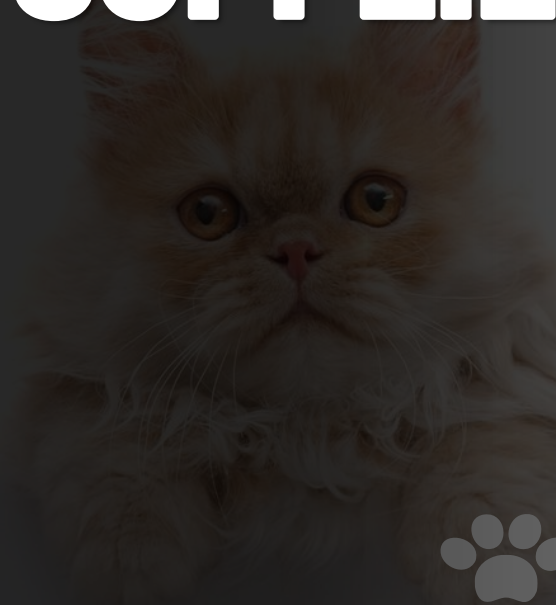


Nowadays pets are no longer just social media content, they're becoming **influential digital personalities**, reflecting the growing role of **pets as both family members** and **lifestyle content drivers**.

This phenomenon reflects **the growing role of pets** in the creator economy, creating new opportunities for:

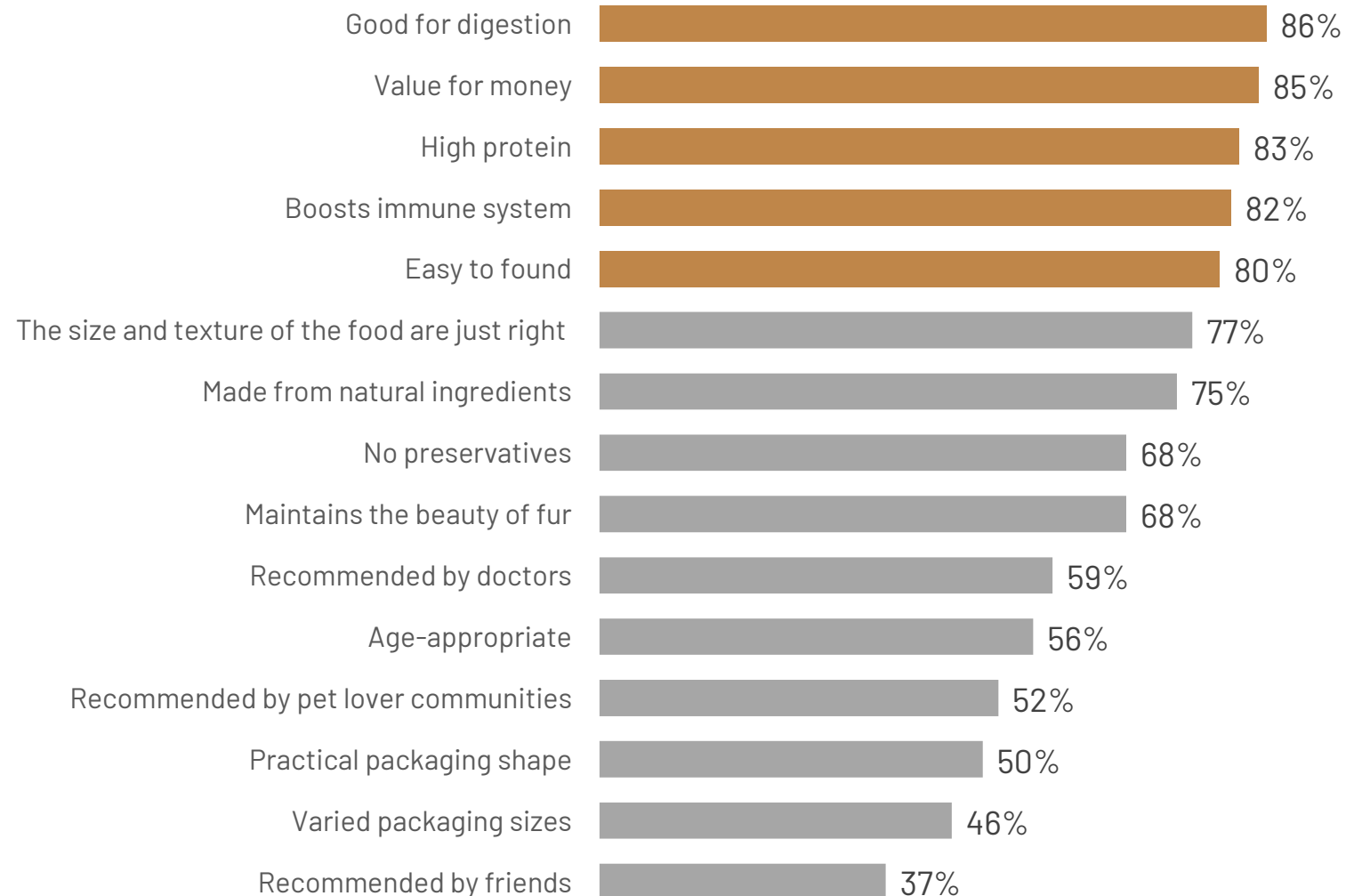
- Content creation,
- Community building, and
- Brand partnerships

WHAT FACTORS ARE DRIVING THE PET FOOD / SUPPLIES CATEGORIES?





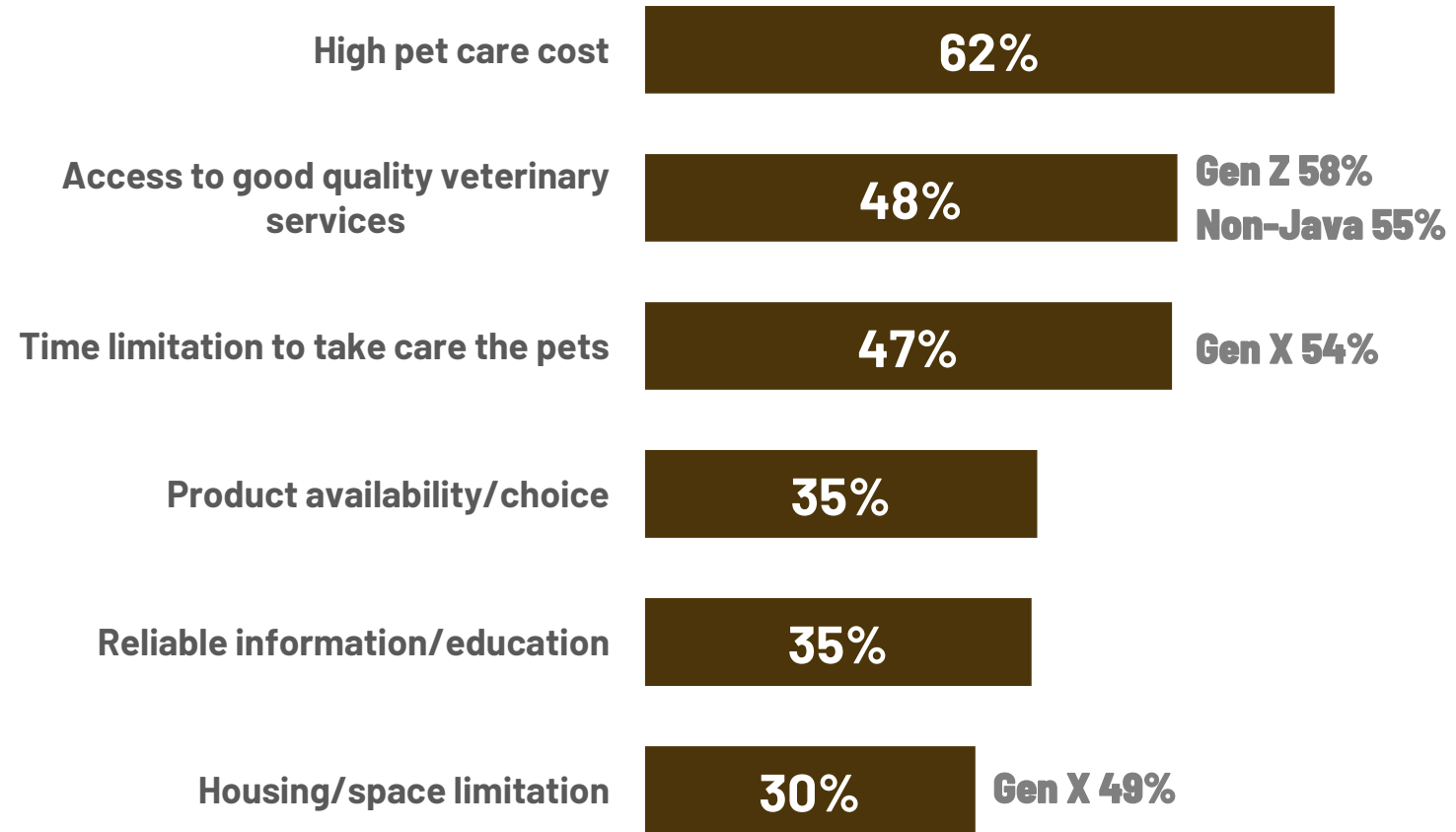
Product benefits, value for money and availability are the top factors for choosing pet food / supplies category



PET OWNERS CHALLENGES AND FUTURE EXPECTATION



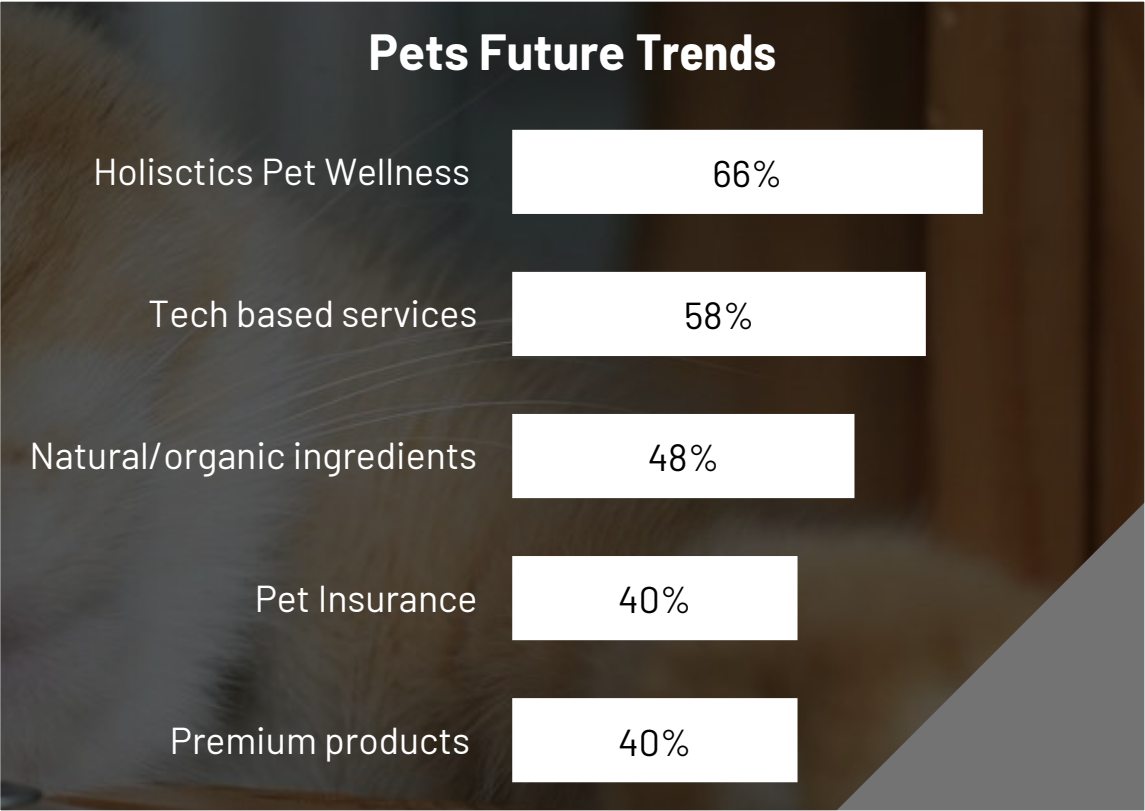
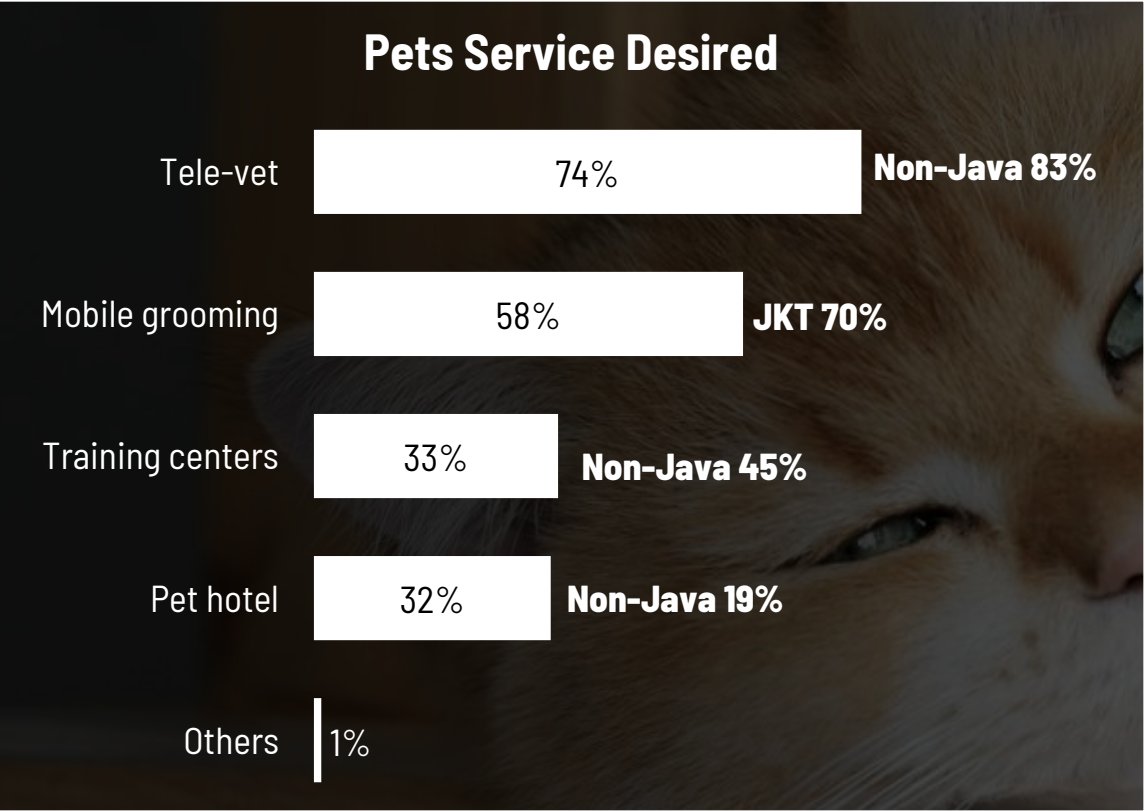
Cost, access to pet experts, and limited time are main challenges



Challenges faced

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Pet owners are expecting to have Tele-vet and Mobile grooming services. They believe that holistic pet wellness and tech-based services will be the future trends



WHAT THE FUTURE | Pets Perspectives and research

How pet food is evolving to fit modern lifestyles



Lisa Campbell

Senior vice president, corporate affairs, Mars Pet Nutrition North America

Pet ownership is evolving as adoption rates soar and pets become integral family members. Pet care and food companies are responding with products that not only meet pets' nutritional needs but also align with modern living conditions and owner preferences, says Mars' Lisa Campbell. She believes this shift is making long-term, responsible pet ownership more accessible and sustainable for the future.



Peanut

Lisa's French Bulldog, age 3

37% of dog owners and 38% of cat owners in the U.S. strongly agree that their pet is the most important thing in their life.

(Source: Mars Global Parent Pet Study, conducted by Ipsos among 490 dog owners and 496 cat owners, 2024.)

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How making pet care more affordable could make people healthier



Jamie Brannan

Chief commercial officer, Zoetis

Humans have a better understanding of their own health, and as we become closer to our pets, that understanding often translates to our furry friends. Better care for our pets can lead to efficiencies, but also new costs. Zoetis is the world's leading animal health company. Its chief commercial officer, Jamie Brannan, sees a future where we help our pets live longer, and maybe they help us live longer, too.

47% of Americans say the ability to afford healthcare for pets will get worse.

(Source: Ipsos survey conducted Jan. 10-13, 2025, among 817 U.S. adults who say they own a pet or intend to get one in the next year.)

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How humanizing pets is reshaping pet owners' habits



Yvonne Hsu

President, general manager, U.S., Hill's Pet Nutrition

Pets are becoming more prominent in our lives. As humans become more aware of the connections between their own diet and health, they are also more aware of how food impacts their pets' health. Hill's Pet Nutrition's Yvonne Hsu knows that people want to feed their pets more human food. But she also knows that even if a pet food doesn't appeal to people, it might appeal to pets. This is just one of the many tensions she faces as she plans for future offers and trends.

91% of U.S. pet owners ages 18-34 say it is important for them to purchase pet foods and treats that promote specific health benefits, such as gut biome improvement or joint health.

(Source: Ipsos survey conducted Jan. 10-13, 2025, among 725 U.S. adults who say they own a pet.)

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What elevating pets in our families and society means for business



Shelly Volsche

Affiliate faculty at Boise State University

Today, we increasingly regard pets as equal members of our families — and even society. For many people, that means having a fur baby in place of human children. For whatever reasons or lifestyles, this pattern is changing how we live, shop, work and travel. Anthropologist and animal welfare expert Shelly Volsche explains how pets replacing kids is not just a passing fad but a significant cultural shift with far-reaching future implications for workplaces, restaurants and urban planning.

4x as many adults ages 18 to 34 (31%) than those ages 55+ (7%) say they have pets but no kids because of the cost.

(Source: Ipsos survey conducted Jan. 10-13, 2025, among 485 U.S. adults who say they have a pet but not a child.)

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Woof & Brew's 'Bottom Sniffer' beer is a dog-friendly, premium treat and a way of including pets in celebrations and special occasions.



Fi's 'Series 3+' smart dog collar provides GPS tracking, activity & sleep analysis, escape alerts, and eating & drinking detection, to allow owners to track their dog's health and safety.

Image credit: Fi



Pet megastore chain Cobasi offers an experiential in-store experience, featuring in-house veterinary clinics, grooming spas, and play areas.

WHAT CAN WE BRING TO THE MARKET....



Food For Thought: Where the future opportunities are for...

Premiumization & Functional Food

- "Indoor Urban Wellness" Line (Mass Premium Focus) - environment triggers specific health issues are highly willing to spend on to prevent such as:
 - **Functional focus** (Urinary Tract Health, Hairball & Weight Control or Odor Reduction).
 - **Premiumization Angle**: use price laddering strategy

Omnichannel Retail Strategy

- Keep focusing on local pet shops around housing area which still dominating the market
- Driving brand awareness simultaneously via flagships stores on Shopee, Tokopedia and TikTok Shop

Wellness

- Aligning "pet humanization" trend matures, strategy must address the two major pain points of the modern Indonesian pet parent: **convenience and deep mistrust of backend salon handling** (fears of pet mistreatment or stress) and **pet expert offering** might also catch up, positioning idea options:
 - The "At-Home On-Demand" Mobile Grooming (Service-Led Growth)
 - "Home-Spa" Premium Grooming Products (Product-Led Growth)
 - Experiential Hubs & Franchise Networks (Retail-Led Growth)

THANK YOU



The pet market is booming. There is a strong humanisation of pet dogs, which are called "perrijos", a mixture of the word perro (dog) and hijo (son). This reflects the importance of pets within the family as members."

Fernando Alvarez Kuri
Senior Cluster Director,
Ipsos in Mexico