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# Market Size, Competition Pattern and Future Development Forecast of China Pet Health Market in 2016

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## Research Background

Data from the National Bureau of Statistics show that there were more than 100 million registered pets in China in 2015, the number increased near nine times from 2005 to 2015. Of that, the number of pet dogs and pet cats respectively was about 65.7 million and 27.4 million. According to investigated data on pet owners in China, about 30 million urban families raise pet in China and account for 10% of total number of urban families, that is one in every ten urban families raises pet, while in the US the percentage was about 65% during the same period. So it can be seen that with fast development of China's economy, acceleration of urbanization process and increasingly outstanding aging problem, the number of pets has great growth potential in China, and China will become the market seeing fastest growth of pet number.

Market size of pet health was about CNY1.4 billion in China in 2015 and accounted for about 3% of animal health product market, while the proportion was up to 50% in the US during the same period. Currently, the market size of China's pet health is small relatively, which is mainly because raisers' attention on disease and acceptance on vaccine are low relatively. We think with the booming of pet raising in China, domestic pet health industry will benefit from it. Not only the number of pets will increase rapidly, Chinese families' expenditure on pet health and medical treatment also will increase gradually in order to provide safer and healthier life for pet and family members, so the market potential of pet health will be very great in China.

Currently, foreign brands take a leading position in China's pet health market with a market share of over 70%, imported products mostly are high-end combined vaccine and health protection medicine and have obvious advantages in immune effect and market acceptance aspects, main brands include MSD, Zoetis, Merial, etc. However, there are about thirty local pet health product manufacturers in China, with backward R&D of pet medicine they have a few commercial products and can't meet the demand of customers. With the release of market potential of pet health products in China, domestic and foreign manufacturers, especially foreign enterprises will accelerate expansion in domestic market and strive to obtain high profit.

So BOABC makes in-depth research on following contents, comprehensively cardings and judges the competition situation and development trend of China's pet health industry so as to assist animal health manufacturers and investment organizations to grasp the develop cause of China's pet health industry.

Main contents of the report include:

- ✓ Current situation and development trend of pet raising in China
- ✓ Market size and competition pattern of China's pet health industry
- ✓ Forecast on growth potential of pet health market in China in next decade
- ✓ Operation situation and future development potential of domestic and foreign animal health enterprises
- ✓ Consumer purchase behavior in first-tier cities (including drug expenditure, purchase channel, factors influencing the choice of consumers)
- ✓ Attached table: Directory and agent brands of 20 large pet hospitals in Beijing

This report is written elaborately based on the data from national level authoritative departments including the National Bureau of Statistics, General Administration of Customs, the MOA, China Institute of Veterinary Drug Control, China Veterinary Drug Association, China Animal Agricultural Association and industrial associations, the data are accurate and authoritative, moreover, this report integrates the views of experts, having high scientificity and prospectiveness. BOABC believes that the report is an important reference material for domestic and foreign animal vaccine manufacturers, investors, associations and research organizations to make strategic decision.

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## Chapter One Characteristics of Pet Raising and Current Situation in China

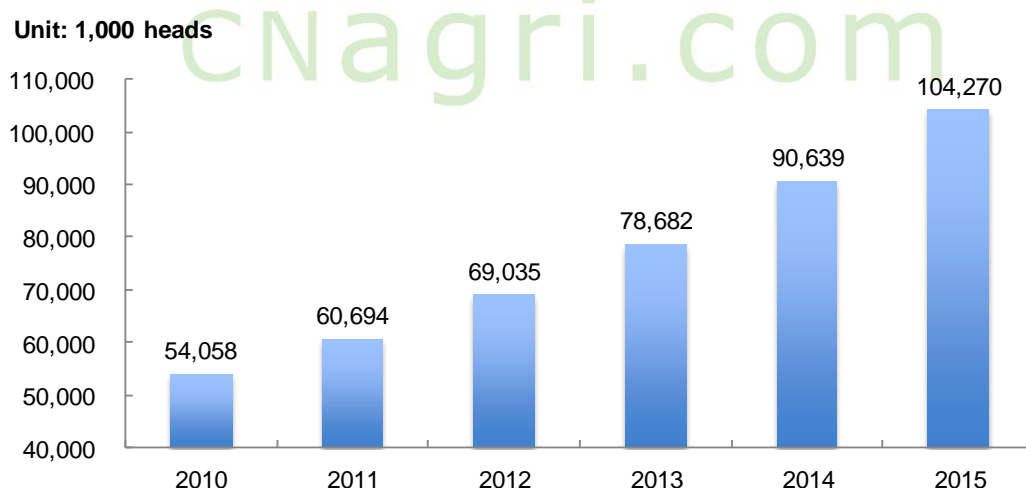
### 1.1 Number of pets in China

In this report, pet dogs and cats refer to companion animal that normally are vaccinated, given medical treatment and fed with cat and dog food.

According to data from national statistical department and domestic main pet media, there were up to more than 100 million pets in China in 2015, the number of pets increased nearly 9 times in past decade from 2005 to 2015. But the survey data on pet owners show that about 30 million urban households raise pets in China, accounting for 10% of China's total urban households. It means that one in ten urban households raises pets, while during the same period about 65% households have pets in the US. So, with the rapid development of economy, acceleration of urbanization and increasingly prominent problem of aging, the number of pets in China has great growth potential, China will become the fastest growing market in terms of pet number.

The number of dogs and cats totally is 93.11 million, accounting for 83.0% of the total number of pets; and the rest pets include aquatic animals, birds and rabbits.

Fig 1-1, Changes in the Number of Pets in China, 2010-2015



Data source: Statistical Bureau, BOABC

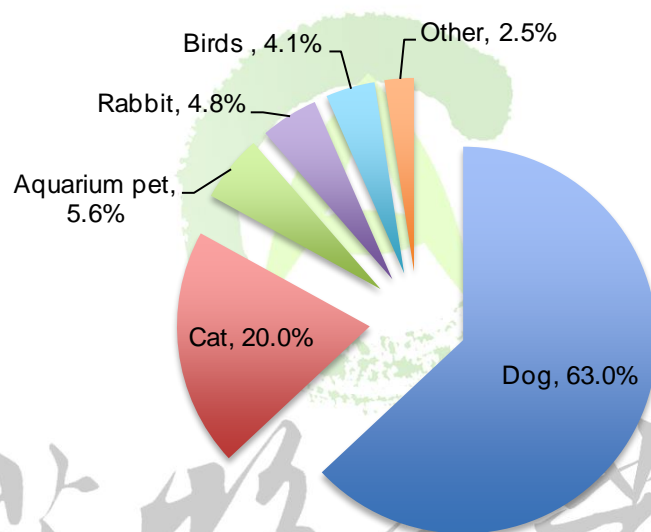
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## 1.2 Pet breed structure in China

Dogs and cats are major companion animals in China, and the next is fish, birds, tortoise, etc. Now, China has about 65.71 million pet dogs, ranking second only to the US (80.60 million pet dogs); and nearly 27.4 million pet cats, ranking third after the US (75.00 million cats) and Brazil (35.70 million cats).

Fig 1-2, Pet breed structure in China



Data source: BOABC

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