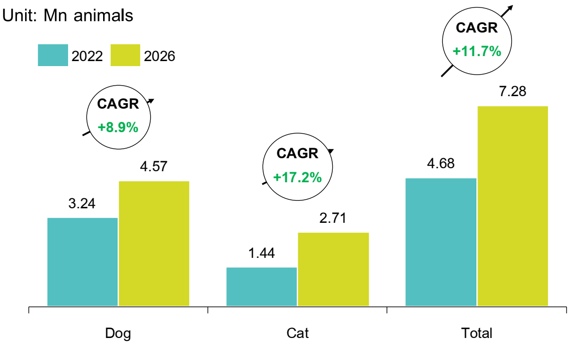
Business Overview

- **The pet grooming and hygiene products business is part of the broader Pet Products industry, covering items used to maintain cleanliness, hygiene, and the health of pets** — such as shampoos, conditioners, coat sprays, cleaning wipes, deodorizing sprays, paw care products, tick and flea treatments, and other health care items. The category spans everyday household staples as well as specialty products, ranging from mass-market goods to Premium and Specialty segments.
- **Demand for these products tends to expand in line with the growing pet population.** The number of owned dogs and cats in Thailand rose from 4.68 million in 2022 to 7.28 million in 2026, a compound annual growth rate (CAGR) of 11.7%. The cat population grew at an even faster pace of 17.2% per year, from 1.44 million to 2.71 million, while the dog population increased by 8.9% per year, from 3.24 million to 4.57 million. **This growth in the pet population represents a fundamental driver expanding the industry's consumer base,** while the faster growth in cat ownership relative to dogs also points to an opportunity to expand products developed specifically for each type of pet.
- Beyond the size of the pet population, **ownership motivation is another factor shaping the level of product demand.** The leading reason for pet ownership is the "Pet Parent" mindset, cited by 49% of respondents, who view their pets as family members and prioritize their well-being. This is followed by "Pet Prestige" at 34%, which reflects pet ownership as a means of enhancing the owner's image and social status, and "Pet Healing" at 18%, where pets are seen as companions that provide emotional fulfillment and stress relief. **These findings indicate that pets are playing an increasingly central role in owners' lives, expanding care from necessities toward a greater emphasis on cleanliness, hygiene, and overall quality of life — a shift that supports the growth of more diverse and specialized pet care products.**

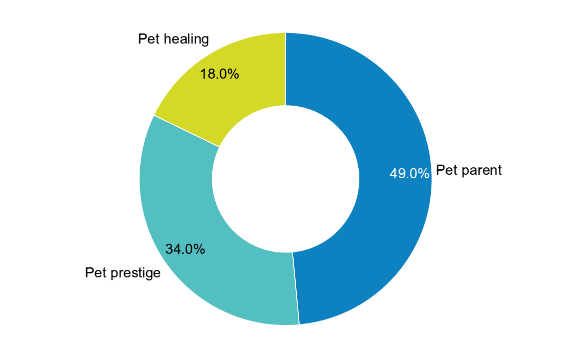
Figure 1 Number of Owned Dogs and Cats in Thailand



Note: 2026 data as of August 6, 2026

Source: Rabies One Data

Figure 2 Key Reasons for Pet Ownership in Thailand



Note: 2023 survey of 1,046 respondents aged 24+

Source: College of Management, Mahidol University (CMMU)

Pet Industry Market Value

- **Thailand's pet market has continued to grow. Total market value (covering the Pet Food, Healthcare, Pet Accessories, and Pet Care Services categories) expanded from THB 33 billion in 2019 to THB 81 billion in 2024,** a compound annual growth rate (CAGR) of approximately 19.7%, and is projected to rise to THB 92 billion in 2025 (+13.6%YoY) and to approximately THB 100 billion in 2026 (+9.8%YoY). **This growth has been driven primarily by the Pet Humanization trend, as modern urban consumers increasingly treat their pets as family members amid smaller household sizes, a growing share of younger generations opting not to have children, and an expanding aging population. As a result, this consumer segment has shown a willingness to pay more to improve their pets' quality of life, providing sustained momentum for products and services across every category of industry.**

- Broken down by product and service category, Pet Food remains the largest segment and the primary growth driver, with its value rising from approximately THB 20,340 million in 2019 to THB 53,570 million in 2024, and projected to reach THB 62,410 million in 2025, a growth rate of 16.5%YoY. Pet Accessories increased from approximately THB 9,260 million to THB 20,080 million and is expected to reach THB 21,280 million in 2025 (+6.0%YoY). Healthcare grew from THB 2,600 million to THB 6,470 million and is expected to reach approximately THB 6,990 million in 2025 (+8.0%YoY). Pet Care Services, although the smallest category by value, posted the second-fastest growth rate after Pet Food, rising from THB 350 million to THB 900 million, and is projected to reach approximately THB 1,040 million in 2025, growing at 15.0%YoY. Pet grooming and cleaning products can be linked to the Pet Care Services category as part of bathing and grooming services, a segment that continues to show a favorable growth trajectory.

Figure 3 Thailand Pet Market Value

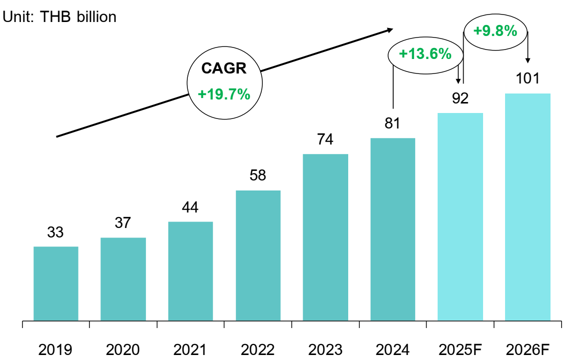
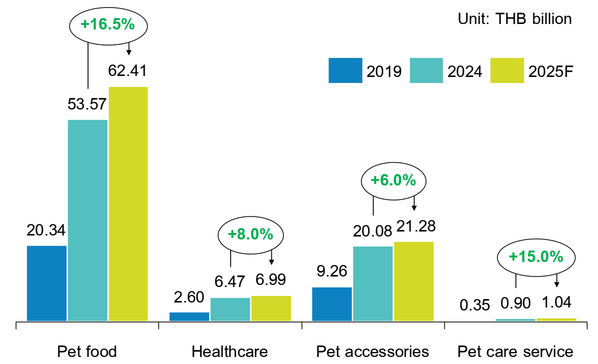


Figure 4 Thailand Pet Market Value by Category



Note: Market value includes the Pet Healthcare, Pet Food, Pet Care Services, and Pet Accessories categories

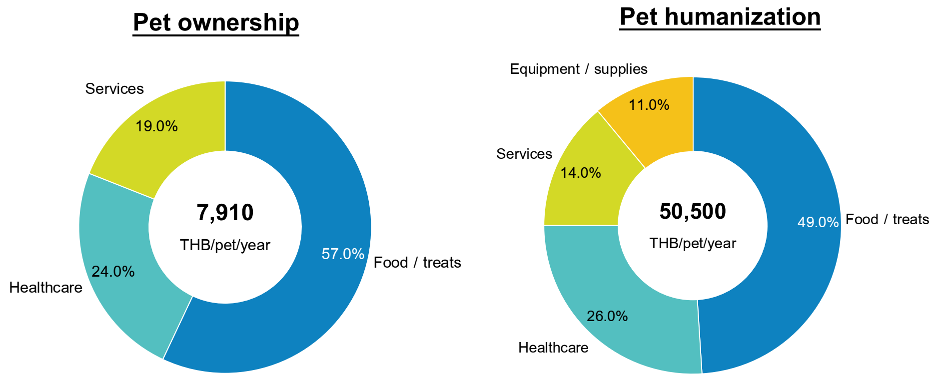
Source: College of Management, Mahidol University (CMMU); data from the Department of Business Development

Consumer Behavior and Demand Trends

- **Examining pet owners' spending behavior reveals clear differences based on the level of importance placed on their pets.** The "Pet Ownership" group, who care for their pets based on basic necessity, spends an average of approximately THB 7,910 per pet per year, split between food and treats (57%), health care (24%), and services (19%). By contrast, the "Pet Humanization" group, who raise their pets as family members, spends as much as THB 50,500 per pet per year — about 6.4 times that of the first group — allocated across food and treats (49%), health care (26%), services (14%), and pet equipment and supplies (11%). This indicates that the shift in status from "pet" to "family member" not only increases overall spending but also diversifies its structure across a wider range of categories, particularly equipment and supplies, which represents an important foundation for the continued expansion of pet care products going forward.

- **In terms of service usage behavior, Grooming — bathing, trimming, and general appearance care for pets — is the most popular service among pet-related services,** accounting for 51.6% of the sample, clearly ahead of hotel (boarding services for pets while owners are away) at 18.5% and Pet Friendly (venues or services that allow pets to accompany their owners, such as cafés, restaurants, malls, or accommodations) at 11.5%. The popularity of Grooming is directly linked to the use of shampoos, conditioners, coat care products, and deodorizing products, both at service outlets and for at-home use, reflecting the growing importance of hygiene, skin and coat care, odor control, and convenience as an increasingly integral part of pet care routines.

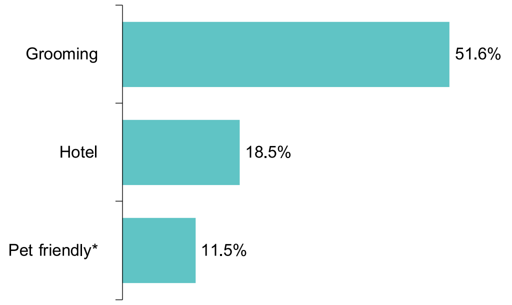
Figure 5 Share of Pet Care Spending



Note: Pet Ownership refers to raising pets based on basic necessity, with an emphasis on economy; Pet Humanization refers to raising pets as one's own children, with a willingness to pay more for an improved quality of life.

Source: College of Management, Mahidol University (CMMU); 2025 survey of 357 respondents

Figure 6 Most Popular Pet Services in 2025



*Pet Friendly refers to venues/services that allow pets to accompany their owners, such as cafés, restaurants, malls, or accommodations

Source: College of Management, Mahidol University (CMMU); 2025 survey of 357 respondents

Costs and Competition

- **Business costs depend on the prices of cleaning agents and key formulation ingredients, such as surfactants, conditioning agents, fragrances, preservatives, and extracts, as well as plastic packaging,**

labor, energy, and transportation costs. Manufacturers that rely on imported raw materials are exposed to both commodity price movements and exchange rate fluctuations, while competition among the wide range of price points in the market limits the extent to which producers can pass costs on to consumers, particularly for mass-market products facing numerous competitors. Example brands found in the Thai market illustrate the diversity of product positioning — from brands focused specifically on tick and flea treatment, such as Bearing, Chaingard, and SmartHeart, which position themselves specifically as tick and flea shampoos for dogs, to brands emphasizing odor control, such as Hartz, or specialized formulas for sensitive skin, such as Virbac, which offers both Allermyl Shampoo and Allerderm Foam Cleanser. Some brands position themselves as full-range players offering a wide variety of products within a single line, such as LovliTails, which offers shampoo, cleaning wipes, and stain/odor removers, or Maxidog and Bio-Groom, which emphasize natural, gentle formulas alongside coat care products. This reflects a market comprising both Thai and international brands, spanning everything from mass-market goods to specialty products with clearly defined benefits.

- **Given this diversity of product positioning, competitiveness going forward is likely to depend more on differentiation than on price competition alone.** Thai brands have an opportunity to compete through their understanding of domestic consumer behavior, pricing, and distribution, while international brands and specialty products can leverage their strengths in formulation, standards, and expertise to establish premium positioning. Operators should therefore develop products that address specific needs, such as formulas for sensitive skin, odor-reducing products, and products with natural ingredients, while expanding distribution to cover pet shops, modern trade, veterinary clinics, grooming salons, and online marketplaces, in order to broaden customer reach and reduce over-reliance on any single channel. Developing products that require repeat use, combined with membership programs or bundled sales, offers a further avenue for increasing repurchase rates and raising value per purchase.

Table 1 Example Brands in the Market

Brand	Example Products
LovliTails	Natural & Mild Dog/Cat Shampoo, Pet Wipes, Stain & Odor Remover
Bearing	Tick & Flea Dog Shampoo
Chaingard	Herbal Experience Mild & Gentle Dog Shampoo, Cat Shampoo
SmartHeart	Shampoo Tick & Flea
Petzania	Seven Shampoo, Gentle Formula, Tick Shampoo
Maxidog	Aloe Vera Shampoo, Shampoo & Conditioner
Bubble Bear	Dog Shampoo, Premium Mild Shampoo, Hair Coat Serum
Hartz	Odor Control Shampoo
Virbac	Allermyl Shampoo, Allerderm Foam Cleanser
Bio-Groom	Natural/Gentle Dog Shampoo, Coat Care

Source: Compiled by LH Bank Business Research

Business Outlook

- **Given the market's continued structural expansion, together with the clear spending gap between the Pet Ownership and Pet Humanization groups, Thailand's pet grooming and cleaning products business is expected to maintain its growth trajectory,** underpinned by robust structural tailwinds — particularly the rising pet population, the shift toward smaller households and an aging society, and the Pet Humanization trend, which is leading pet owners to allocate their budgets across an increasingly diverse range of categories, including both health care and specialty equipment. As a result, per-pet spending is likely to continue rising, supporting growth in higher value-added products such as formulas for sensitive skin, naturally derived products, and specialized care items. Likewise, the popularity of Grooming services reflects the fact that appearance and cleanliness care is becoming an integral part of pet-rearing routines. The expansion of modern distribution channels and online platforms represents another important factor supporting market growth in the same direction, with e-commerce and social commerce playing a growing role in building brand awareness, reaching consumers, and distributing niche products. Meanwhile, the expansion of animal hospitals, veterinary clinics, and grooming salons is broadening distribution opportunities, enabling operators to diversify their sales channels and reduce reliance on traditional retail channels.
- **However, given the diversity of both Thai and international brands already present in the market, competition within the industry is likely to intensify further as new entrants pursue price-based strategies.** Combined with the growth of online channels, which makes it easier for consumers to compare prices and product features, competing on quality, innovation, and brand differentiation will become more important than price competition alone.
- On the cost side, volatility in the prices of cleaning agents and imported components — such as surfactants, conditioning agents, and specialty extracts — as well as certain types of plastic packaging, remains a factor that warrants close monitoring, as costs remain sensitive to changes in petrochemical prices, exchange rates, and international freight costs. Although logistics conditions have gradually eased compared with previous periods, uncertainty in the global economy and geopolitical risks may continue to periodically affect supply chains. As such, **the ability to diversify raw material sourcing, manage inventory effectively, and pass through costs will be key factors determining operators' profitability.**
- In addition, standards governing product safety, chemical use, and environmentally friendly packaging are likely to become increasingly stringent both domestically and in export markets. While this will raise costs related to product development and certification, it also presents an opportunity for operators with strengths in natural products or specialized formulations to develop products that meet international standards and build consumer confidence — helping to expand market opportunities and strengthen long-term competitiveness.

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