

Table 11

Pet Food Imports by Country (January to October 1989)

Country	Tons	Import Value (\$)	Cost per Ton (C\$)
U.S.	53 447	85 693 790	1 633
Thailand	29 217	52 038 845	1 781
Australia	32 257	53 044 470	1 644
West Germany	6 834	13 956 170	2 042
U.K.	1 612	2 551 970	1 583
Taiwan	1 159	2 636 680	2 210
Canada	1 271	2 984 270	2 347
Others	4 381	8 183 085	1 867
World	129 178	221 089 280	1 888

Source: Ministry of Finance.

Many types of finished product are imported from the U.S., with grain products as the largest volume items. Australia provides a variety of goods, but low cost beef material is the major category. Regardless of country of origin, most products have a Western image, with labels in roman lettering and Western names.

Domestic Industry

While there are over 50 pet food manufacturers in Japan, the seven largest companies account for 70 per cent of production according to *Fuji Keizai Marketing Handbook*.

Japan Pet Food with sales of \$145 million owns a 17.3 per cent share of the market. Established in 1963 as an affiliate of Kyodo Shiryō Co. Ltd., a feed manufacturer, Japan Pet Food gained first place with its "Vita-One" dog food. Cat food is imported from suppliers in Thailand, Fiji, the Philippines and Taiwan. The grains and meat for most of the other products are imported.

Master Foods Japan with sales of \$124 million owns a 14.8 per cent share of the market. Master Foods (previously Effem Japan) is associated with the British Mars group and sells the Pedigree Chum brand; the company accounts for the majority of imports from Britain.

Purina-Taiyo Pet Food with sales of \$81 million owns a 9.7 per cent share of the market. This is a venture between Ralston Purina of the U.S., the world's largest pet food manufacturer, and Taiyo Fishery Co., one of Japan's largest fishery companies. With a plant in Chiba, they are split evenly between imported and domestically produced foods, concentrating on dog and cat food. The company imports principally from the U.S. (dry foods and Ralston Purina) and Thailand (mainly fish-based cat food made by several local licensees). Japanese produce comes from a Taiyo fishery factory. Fifty per cent of dry goods and 60 per cent of wet are imported. Brands include Purina and Cat Chow.

Ajinomoto-General Foods with sales of \$70 million owns a 8.3 per cent share of the market. This highly successful food company sells a range of goods; pet food accounts for only a small part of its line. The company has the advantage of regular distribution channels already established in every supermarket in the country. AGF sells the Gaines brand.

Nissbin Pet Foods with sales of \$70 million owns an 8.3 per cent share of the market; *Pet Line* with sales of \$56 million owns a 6.7 per cent share; and *Frisky* with sales of \$35 million owns a 4.2 per cent share.

Approximately 50 other manufacturers have joint sales of \$257 million and together own a 30.7 per cent share of the market.