

Global Dog Raw Food Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Dog Raw Food market size is expected to reach \$ 19120 million by 2032, rising at a market growth of 5.0% CAGR during the forecast period (2026-2032).

In 2025, global sales volume of raw dog food is estimated at approximately 2.2 million tons, with an average selling price of around USD 6,200 per ton. Raw dog food refers to canine pet food products composed primarily of uncooked animal ingredients, including raw meat, bones, organs, and limited plant-based components, preserved and distributed through freezing, freeze-drying, or refrigerated systems to maintain maximum nutritional integrity. The category is based on BARF (Biologically Appropriate Raw Food) or Prey Model Raw feeding philosophies, aiming to replicate ancestral canine diets and primarily targeting premium consumers who prioritize natural feeding, nutritional completeness, and functional health management. Raw dog food is characterized by high animal protein content, minimal processing, and grain-free positioning, while relying heavily on cold-chain logistics, making its supply chain significantly more complex than conventional dog food. Current product forms include frozen raw diets, freeze-dried raw diets, and pre-packaged raw formulations, with ongoing evolution toward single-protein optimization and functional nutrition enhancement such as gastrointestinal health, joint support, and skin care, reflecting a broader shift toward high-meat, minimally processed, and natural nutrition systems.

Raw dog food is a premium niche segment within the global pet food industry, characterized by extreme natural positioning and functional nutrition orientation. Demand is primarily driven by the humanization of pet feeding behavior, the widespread adoption of natural diet concepts, and increasing demand for premium pet health management. North America is the largest market, followed by Europe and Australia, while China and broader Asian markets remain in early development stages. The

category mainly targets high-income pet owners, small-breed dogs, and dogs requiring advanced health management, and is partially supported by veterinary nutrition perspectives, although it remains controversial in terms of standardization and food safety regulation. The competitive landscape is dominated by specialized raw food brands and premium pet food companies such as Stella & Chewy's, Primal Pet Foods, and Instinct Raw, while some traditional pet food corporations have entered the segment through premium sub-brands. Key barriers include cold-chain logistics infrastructure, food safety control systems, biological risk management capabilities, and stable raw material supply chains. Due to strict microbial control requirements, regulatory standards vary significantly across countries, limiting global scalability. Key trends include increased freeze-dried and standardized formulations, stronger functional nutrition positioning, and a gradual shift from extreme natural feeding ideology toward a balance between scientific nutrition and natural diet structures, with growth concentrated mainly in the premium segment rather than mass adoption.

This report studies the global Dog Raw Food production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Dog Raw Food and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Dog Raw Food that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Dog Raw Food total production and demand, 2021-2032, (Kilotons)

Global Dog Raw Food total production value, 2021-2032, (USD Million)

Global Dog Raw Food production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons), (based on production site)

Global Dog Raw Food consumption by region & country, CAGR, 2021-2032 & (Kilotons)

U.S. VS China: Dog Raw Food domestic production, consumption, key domestic manufacturers and share

Global Dog Raw Food production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Kilotons)

Global Dog Raw Food production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

Global Dog Raw Food production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

This report profiles key players in the global Dog Raw Food market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Open Farm, The Honest Kitchen, ACANA, Orijen, Animonda, Stella & Chewy?s, BIO BISCUIT, Hill's Pet Nutrition, Purina, Royal Canin, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Dog Raw Food market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Kilotons) and average price (US\$/Ton) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Dog Raw Food Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Dog Raw Food Market, Segmentation by Type:

Frozen Food

Freeze-Dried Food

Global Dog Raw Food Market, Segmentation by Grain Formulation:

Grain-inclusive

Grain-free

Global Dog Raw Food Market, Segmentation by Life Stage:

Kitten

Adult

Global Dog Raw Food Market, Segmentation by Application:

Puppy

Senior Dogs

Medium Dogs

Companies Profiled:

Open Farm

The Honest Kitchen

ACANA

Orijen

Animonda

Stella & Chewy's

BIO BISCUIT

Hill's Pet Nutrition

Purina

Royal Canin

Mars Petcare

Dalian Youchong

FUBEI (SHANGHAI)

Petpal Pet Nutrition Technology

Yantai China Pet Foods

Jasper Pet Care Products

PEPTIDO(Beijing) International Biotechnology

Guaibao Pet Food Group

Shanghai Bridge PetCare

Jiangsu JIA Pet Products

Shenzhen Freeze-Dried Pet Products

Shanghai Navarch Pet Products

Huaxing Pet Food

Xingtai Nuode Pet Products

Zhejiang Ji Chong Animal Nutrition Technology

Shanghai Yiyun Pet Products

Shanghai Chongxing Pet Products

Shandong KERES Animal Nutrition

Key Questions Answered:

1. How big is the global Dog Raw Food market?
2. What is the demand of the global Dog Raw Food market?
3. What is the year over year growth of the global Dog Raw Food market?
4. What is the production and production value of the global Dog Raw Food market?
5. Who are the key producers in the global Dog Raw Food market?
6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

- 1.1 Dog Raw Food Introduction
- 1.2 World Dog Raw Food Supply & Forecast
 - 1.2.1 World Dog Raw Food Production Value (2021 & 2025 & 2032)
 - 1.2.2 World Dog Raw Food Production (2021-2032)
 - 1.2.3 World Dog Raw Food Pricing Trends (2021-2032)
- 1.3 World Dog Raw Food Production by Region (Based on Production Site)
 - 1.3.1 World Dog Raw Food Production Value by Region (2021-2032)
 - 1.3.2 World Dog Raw Food Production by Region (2021-2032)
 - 1.3.3 World Dog Raw Food Average Price by Region (2021-2032)
 - 1.3.4 North America Dog Raw Food Production (2021-2032)
 - 1.3.5 Europe Dog Raw Food Production (2021-2032)
 - 1.3.6 China Dog Raw Food Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 Dog Raw Food Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 Dog Raw Food Major Market Trends

2 DEMAND SUMMARY

- 2.1 World Dog Raw Food Demand (2021-2032)
- 2.2 World Dog Raw Food Consumption by Region
 - 2.2.1 World Dog Raw Food Consumption by Region (2021-2026)
 - 2.2.2 World Dog Raw Food Consumption Forecast by Region (2027-2032)
- 2.3 United States Dog Raw Food Consumption (2021-2032)
- 2.4 China Dog Raw Food Consumption (2021-2032)
- 2.5 Europe Dog Raw Food Consumption (2021-2032)
- 2.6 Japan Dog Raw Food Consumption (2021-2032)
- 2.7 South Korea Dog Raw Food Consumption (2021-2032)
- 2.8 ASEAN Dog Raw Food Consumption (2021-2032)
- 2.9 India Dog Raw Food Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World Dog Raw Food Production Value by Manufacturer (2021-2026)
- 3.2 World Dog Raw Food Production by Manufacturer (2021-2026)

3.3 World Dog Raw Food Average Price by Manufacturer (2021-2026)

3.4 Dog Raw Food Company Evaluation Quadrant

3.5 Industry Rank and Concentration Rate (CR)

3.5.1 Global Dog Raw Food Industry Rank of Major Manufacturers

3.5.2 Global Concentration Ratios (CR4) for Dog Raw Food in 2025

3.5.3 Global Concentration Ratios (CR8) for Dog Raw Food in 2025

3.6 Dog Raw Food Market: Overall Company Footprint Analysis

3.6.1 Dog Raw Food Market: Region Footprint

3.6.2 Dog Raw Food Market: Company Product Type Footprint

3.6.3 Dog Raw Food Market: Company Product Application Footprint

3.7 Competitive Environment

3.7.1 Historical Structure of the Industry

3.7.2 Barriers of Market Entry

3.7.3 Factors of Competition

3.8 New Entrant and Capacity Expansion Plans

3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

4.1 United States VS China: Dog Raw Food Production Value Comparison

4.1.1 United States VS China: Dog Raw Food Production Value Comparison (2021 & 2025 & 2032)

4.1.2 United States VS China: Dog Raw Food Production Value Market Share Comparison (2021 & 2025 & 2032)

4.2 United States VS China: Dog Raw Food Production Comparison

4.2.1 United States VS China: Dog Raw Food Production Comparison (2021 & 2025 & 2032)

4.2.2 United States VS China: Dog Raw Food Production Market Share Comparison (2021 & 2025 & 2032)

4.3 United States VS China: Dog Raw Food Consumption Comparison

4.3.1 United States VS China: Dog Raw Food Consumption Comparison (2021 & 2025 & 2032)

4.3.2 United States VS China: Dog Raw Food Consumption Market Share Comparison (2021 & 2025 & 2032)

4.4 United States Based Dog Raw Food Manufacturers and Market Share, 2021-2026

4.4.1 United States Based Dog Raw Food Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers Dog Raw Food Production Value (2021-2026)

- 4.4.3 United States Based Manufacturers Dog Raw Food Production (2021-2026)
- 4.5 China Based Dog Raw Food Manufacturers and Market Share
 - 4.5.1 China Based Dog Raw Food Manufacturers, Headquarters and Production Site (Province, Country)
 - 4.5.2 China Based Manufacturers Dog Raw Food Production Value (2021-2026)
 - 4.5.3 China Based Manufacturers Dog Raw Food Production (2021-2026)
- 4.6 Rest of World Based Dog Raw Food Manufacturers and Market Share, 2021-2026
 - 4.6.1 Rest of World Based Dog Raw Food Manufacturers, Headquarters and Production Site (State, Country)
 - 4.6.2 Rest of World Based Manufacturers Dog Raw Food Production Value (2021-2026)
 - 4.6.3 Rest of World Based Manufacturers Dog Raw Food Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

- 5.1 World Dog Raw Food Market Size Overview by Type: 2021 VS 2025 VS 2032
- 5.2 Segment Introduction by Type
 - 5.2.1 Frozen Food
 - 5.2.2 Freeze-Dried Food
- 5.3 Market Segment by Type
 - 5.3.1 World Dog Raw Food Production by Type (2021-2032)
 - 5.3.2 World Dog Raw Food Production Value by Type (2021-2032)
 - 5.3.3 World Dog Raw Food Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY GRAIN FORMULATION

- 6.1 World Dog Raw Food Market Size Overview by Grain Formulation: 2021 VS 2025 VS 2032
- 6.2 Segment Introduction by Grain Formulation
 - 6.2.1 Grain-inclusive
 - 6.2.2 Grain-free
- 6.3 Market Segment by Grain Formulation
 - 6.3.1 World Dog Raw Food Production by Grain Formulation (2021-2032)
 - 6.3.2 World Dog Raw Food Production Value by Grain Formulation (2021-2032)
 - 6.3.3 World Dog Raw Food Average Price by Grain Formulation (2021-2032)

7 MARKET ANALYSIS BY LIFE STAGE

- 7.1 World Dog Raw Food Market Size Overview by Life Stage: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Life Stage

7.2.1 Kitten

7.2.2 Adult

7.3 Market Segment by Life Stage

7.3.1 World Dog Raw Food Production by Life Stage (2021-2032)

7.3.2 World Dog Raw Food Production Value by Life Stage (2021-2032)

7.3.3 World Dog Raw Food Average Price by Life Stage (2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World Dog Raw Food Market Size Overview by Application: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 Puppy

8.2.2 Senior Dogs

8.2.3 Medium Dogs

8.3 Market Segment by Application

8.3.1 World Dog Raw Food Production by Application (2021-2032)

8.3.2 World Dog Raw Food Production Value by Application (2021-2032)

8.3.3 World Dog Raw Food Average Price by Application (2021-2032)

9 COMPANY PROFILES

9.1 Open Farm

9.1.1 Open Farm Details

9.1.2 Open Farm Major Business

9.1.3 Open Farm Dog Raw Food Product and Services

9.1.4 Open Farm Dog Raw Food Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.1.5 Open Farm Recent Developments/Updates

9.1.6 Open Farm Competitive Strengths & Weaknesses

9.2 The Honest Kitchen

9.2.1 The Honest Kitchen Details

9.2.2 The Honest Kitchen Major Business

9.2.3 The Honest Kitchen Dog Raw Food Product and Services

9.2.4 The Honest Kitchen Dog Raw Food Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.2.5 The Honest Kitchen Recent Developments/Updates

9.2.6 The Honest Kitchen Competitive Strengths & Weaknesses

9.3 ACANA

- 9.3.1 ACANA Details
- 9.3.2 ACANA Major Business
- 9.3.3 ACANA Dog Raw Food Product and Services
- 9.3.4 ACANA Dog Raw Food Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.3.5 ACANA Recent Developments/Updates
- 9.3.6 ACANA Competitive Strengths & Weaknesses
- 9.4 Orijen
 - 9.4.1 Orijen Details
 - 9.4.2 Orijen Major Business
 - 9.4.3 Orijen Dog Raw Food Product and Services
 - 9.4.4 Orijen Dog Raw Food Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.4.5 Orijen Recent Developments/Updates
 - 9.4.6 Orijen Competitive Strengths & Weaknesses
- 9.5 Animonda
 - 9.5.1 Animonda Details
 - 9.5.2 Animonda Major Business
 - 9.5.3 Animonda Dog Raw Food Product and Services
 - 9.5.4 Animonda Dog Raw Food Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.5.5 Animonda Recent Developments/Updates
 - 9.5.6 Animonda Competitive Strengths & Weaknesses
- 9.6 Stella & Chewy?s
 - 9.6.1 Stella & Chewy?s Details
 - 9.6.2 Stella & Chewy?s Major Business
 - 9.6.3 Stella & Chewy?s Dog Raw Food Product and Services
 - 9.6.4 Stella & Chewy?s Dog Raw Food Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.6.5 Stella & Chewy?s Recent Developments/Updates
 - 9.6.6 Stella & Chewy?s Competitive Strengths & Weaknesses
- 9.7 BIO BISCUIT
 - 9.7.1 BIO BISCUIT Details
 - 9.7.2 BIO BISCUIT Major Business
 - 9.7.3 BIO BISCUIT Dog Raw Food Product and Services
 - 9.7.4 BIO BISCUIT Dog Raw Food Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.7.5 BIO BISCUIT Recent Developments/Updates
 - 9.7.6 BIO BISCUIT Competitive Strengths & Weaknesses

9.8 Hill's Pet Nutrition

9.8.1 Hill's Pet Nutrition Details

9.8.2 Hill's Pet Nutrition Major Business

9.8.3 Hill's Pet Nutrition Dog Raw Food Product and Services

9.8.4 Hill's Pet Nutrition Dog Raw Food Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.8.5 Hill's Pet Nutrition Recent Developments/Updates

9.8.6 Hill's Pet Nutrition Competitive Strengths & Weaknesses

9.9 Purina

9.9.1 Purina Details

9.9.2 Purina Major Business

9.9.3 Purina Dog Raw Food Product and Services

9.9.4 Purina Dog Raw Food Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.9.5 Purina Recent Developments/Updates

9.9.6 Purina Competitive Strengths & Weaknesses

9.10 Royal Canin

9.10.1 Royal Canin Details

9.10.2 Royal Canin Major Business

9.10.3 Royal Canin Dog Raw Food Product and Services

9.10.4 Royal Canin Dog Raw Food Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.10.5 Royal Canin Recent Developments/Updates

9.10.6 Royal Canin Competitive Strengths & Weaknesses

9.11 Mars Petcare

9.11.1 Mars Petcare Details

9.11.2 Mars Petcare Major Business

9.11.3 Mars Petcare Dog Raw Food Product and Services

9.11.4 Mars Petcare Dog Raw Food Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.11.5 Mars Petcare Recent Developments/Updates

9.11.6 Mars Petcare Competitive Strengths & Weaknesses

9.12 Dalian Youchong

9.12.1 Dalian Youchong Details

9.12.2 Dalian Youchong Major Business

9.12.3 Dalian Youchong Dog Raw Food Product and Services

9.12.4 Dalian Youchong Dog Raw Food Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.12.5 Dalian Youchong Recent Developments/Updates

- 9.12.6 Dalian Youchong Competitive Strengths & Weaknesses
- 9.13 FUBEI (SHANGHAI)
 - 9.13.1 FUBEI (SHANGHAI) Details
 - 9.13.2 FUBEI (SHANGHAI) Major Business
 - 9.13.3 FUBEI (SHANGHAI) Dog Raw Food Product and Services
 - 9.13.4 FUBEI (SHANGHAI) Dog Raw Food Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.13.5 FUBEI (SHANGHAI) Recent Developments/Updates
 - 9.13.6 FUBEI (SHANGHAI) Competitive Strengths & Weaknesses
- 9.14 Petpal Pet Nutrition Technology
 - 9.14.1 Petpal Pet Nutrition Technology Details
 - 9.14.2 Petpal Pet Nutrition Technology Major Business
 - 9.14.3 Petpal Pet Nutrition Technology Dog Raw Food Product and Services
 - 9.14.4 Petpal Pet Nutrition Technology Dog Raw Food Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.14.5 Petpal Pet Nutrition Technology Recent Developments/Updates
 - 9.14.6 Petpal Pet Nutrition Technology Competitive Strengths & Weaknesses
- 9.15 Yantai China Pet Foods
 - 9.15.1 Yantai China Pet Foods Details
 - 9.15.2 Yantai China Pet Foods Major Business
 - 9.15.3 Yantai China Pet Foods Dog Raw Food Product and Services
 - 9.15.4 Yantai China Pet Foods Dog Raw Food Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.15.5 Yantai China Pet Foods Recent Developments/Updates
 - 9.15.6 Yantai China Pet Foods Competitive Strengths & Weaknesses
- 9.16 Jasper Pet Care Products
 - 9.16.1 Jasper Pet Care Products Details
 - 9.16.2 Jasper Pet Care Products Major Business
 - 9.16.3 Jasper Pet Care Products Dog Raw Food Product and Services
 - 9.16.4 Jasper Pet Care Products Dog Raw Food Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.16.5 Jasper Pet Care Products Recent Developments/Updates
 - 9.16.6 Jasper Pet Care Products Competitive Strengths & Weaknesses
- 9.17 PEPTIDO(Beijing) International Biotechnology
 - 9.17.1 PEPTIDO(Beijing) International Biotechnology Details
 - 9.17.2 PEPTIDO(Beijing) International Biotechnology Major Business
 - 9.17.3 PEPTIDO(Beijing) International Biotechnology Dog Raw Food Product and Services
 - 9.17.4 PEPTIDO(Beijing) International Biotechnology Dog Raw Food Production,

Price, Value, Gross Margin and Market Share (2021-2026)

9.17.5 PEPTIDO(Beijing) International Biotechnology Recent Developments/Updates

9.17.6 PEPTIDO(Beijing) International Biotechnology Competitive Strengths & Weaknesses

9.18 Guaibao Pet Food Group

9.18.1 Guaibao Pet Food Group Details

9.18.2 Guaibao Pet Food Group Major Business

9.18.3 Guaibao Pet Food Group Dog Raw Food Product and Services

9.18.4 Guaibao Pet Food Group Dog Raw Food Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.18.5 Guaibao Pet Food Group Recent Developments/Updates

9.18.6 Guaibao Pet Food Group Competitive Strengths & Weaknesses

9.19 Shanghai Bridge PetCare

9.19.1 Shanghai Bridge PetCare Details

9.19.2 Shanghai Bridge PetCare Major Business

9.19.3 Shanghai Bridge PetCare Dog Raw Food Product and Services

9.19.4 Shanghai Bridge PetCare Dog Raw Food Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.19.5 Shanghai Bridge PetCare Recent Developments/Updates

9.19.6 Shanghai Bridge PetCare Competitive Strengths & Weaknesses

9.20 Jiangsu JIA Pet Products

9.20.1 Jiangsu JIA Pet Products Details

9.20.2 Jiangsu JIA Pet Products Major Business

9.20.3 Jiangsu JIA Pet Products Dog Raw Food Product and Services

9.20.4 Jiangsu JIA Pet Products Dog Raw Food Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.20.5 Jiangsu JIA Pet Products Recent Developments/Updates

9.20.6 Jiangsu JIA Pet Products Competitive Strengths & Weaknesses

9.21 Shenzhen Freeze-Dried Pet Products

9.21.1 Shenzhen Freeze-Dried Pet Products Details

9.21.2 Shenzhen Freeze-Dried Pet Products Major Business

9.21.3 Shenzhen Freeze-Dried Pet Products Dog Raw Food Product and Services

9.21.4 Shenzhen Freeze-Dried Pet Products Dog Raw Food Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.21.5 Shenzhen Freeze-Dried Pet Products Recent Developments/Updates

9.21.6 Shenzhen Freeze-Dried Pet Products Competitive Strengths & Weaknesses

9.22 Shanghai Navarch Pet Products

9.22.1 Shanghai Navarch Pet Products Details

9.22.2 Shanghai Navarch Pet Products Major Business

- 9.22.3 Shanghai Navarch Pet Products Dog Raw Food Product and Services
- 9.22.4 Shanghai Navarch Pet Products Dog Raw Food Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.22.5 Shanghai Navarch Pet Products Recent Developments/Updates
- 9.22.6 Shanghai Navarch Pet Products Competitive Strengths & Weaknesses
- 9.23 Huaxing Pet Food
 - 9.23.1 Huaxing Pet Food Details
 - 9.23.2 Huaxing Pet Food Major Business
 - 9.23.3 Huaxing Pet Food Dog Raw Food Product and Services
 - 9.23.4 Huaxing Pet Food Dog Raw Food Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.23.5 Huaxing Pet Food Recent Developments/Updates
 - 9.23.6 Huaxing Pet Food Competitive Strengths & Weaknesses
- 9.24 Xingtai Nuode Pet Products
 - 9.24.1 Xingtai Nuode Pet Products Details
 - 9.24.2 Xingtai Nuode Pet Products Major Business
 - 9.24.3 Xingtai Nuode Pet Products Dog Raw Food Product and Services
 - 9.24.4 Xingtai Nuode Pet Products Dog Raw Food Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.24.5 Xingtai Nuode Pet Products Recent Developments/Updates
 - 9.24.6 Xingtai Nuode Pet Products Competitive Strengths & Weaknesses
- 9.25 Zhejiang Ji Chong Animal Nutrition Technology
 - 9.25.1 Zhejiang Ji Chong Animal Nutrition Technology Details
 - 9.25.2 Zhejiang Ji Chong Animal Nutrition Technology Major Business
 - 9.25.3 Zhejiang Ji Chong Animal Nutrition Technology Dog Raw Food Product and Services
 - 9.25.4 Zhejiang Ji Chong Animal Nutrition Technology Dog Raw Food Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.25.5 Zhejiang Ji Chong Animal Nutrition Technology Recent Developments/Updates
 - 9.25.6 Zhejiang Ji Chong Animal Nutrition Technology Competitive Strengths & Weaknesses
- 9.26 Shanghai Yiyun Pet Products
 - 9.26.1 Shanghai Yiyun Pet Products Details
 - 9.26.2 Shanghai Yiyun Pet Products Major Business
 - 9.26.3 Shanghai Yiyun Pet Products Dog Raw Food Product and Services
 - 9.26.4 Shanghai Yiyun Pet Products Dog Raw Food Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.26.5 Shanghai Yiyun Pet Products Recent Developments/Updates
 - 9.26.6 Shanghai Yiyun Pet Products Competitive Strengths & Weaknesses

9.27 Shanghai Chongxing Pet Products

9.27.1 Shanghai Chongxing Pet Products Details

9.27.2 Shanghai Chongxing Pet Products Major Business

9.27.3 Shanghai Chongxing Pet Products Dog Raw Food Product and Services

9.27.4 Shanghai Chongxing Pet Products Dog Raw Food Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.27.5 Shanghai Chongxing Pet Products Recent Developments/Updates

9.27.6 Shanghai Chongxing Pet Products Competitive Strengths & Weaknesses

9.28 Shandong KERES Animal Nutrition

9.28.1 Shandong KERES Animal Nutrition Details

9.28.2 Shandong KERES Animal Nutrition Major Business

9.28.3 Shandong KERES Animal Nutrition Dog Raw Food Product and Services

9.28.4 Shandong KERES Animal Nutrition Dog Raw Food Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.28.5 Shandong KERES Animal Nutrition Recent Developments/Updates

9.28.6 Shandong KERES Animal Nutrition Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

10.1 Dog Raw Food Industry Chain

10.2 Dog Raw Food Upstream Analysis

10.2.1 Dog Raw Food Core Raw Materials

10.2.2 Main Manufacturers of Dog Raw Food Core Raw Materials

10.3 Midstream Analysis

10.4 Downstream Analysis

10.5 Dog Raw Food Production Mode

10.6 Dog Raw Food Procurement Model

10.7 Dog Raw Food Industry Sales Model and Sales Channels

10.7.1 Dog Raw Food Sales Model

10.7.2 Dog Raw Food Typical Distributors

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

12.1 Methodology

12.2 Research Process and Data Source

12.3 Disclaimer

List Of Tables

LIST OF TABLES

- Table 1. World Dog Raw Food Production Value by Region (2021, 2025 and 2032) & (USD Million)
- Table 2. World Dog Raw Food Production Value by Region (2021-2026) & (USD Million)
- Table 3. World Dog Raw Food Production Value by Region (2027-2032) & (USD Million)
- Table 4. World Dog Raw Food Production Value Market Share by Region (2021-2026)
- Table 5. World Dog Raw Food Production Value Market Share by Region (2027-2032)
- Table 6. World Dog Raw Food Production by Region (2021-2026) & (Kilotons)
- Table 7. World Dog Raw Food Production by Region (2027-2032) & (Kilotons)
- Table 8. World Dog Raw Food Production Market Share by Region (2021-2026)
- Table 9. World Dog Raw Food Production Market Share by Region (2027-2032)
- Table 10. World Dog Raw Food Average Price by Region (2021-2026) & (US\$/Ton)
- Table 11. World Dog Raw Food Average Price by Region (2027-2032) & (US\$/Ton)
- Table 12. Dog Raw Food Major Market Trends
- Table 13. World Dog Raw Food Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Kilotons)
- Table 14. World Dog Raw Food Consumption by Region (2021-2026) & (Kilotons)
- Table 15. World Dog Raw Food Consumption Forecast by Region (2027-2032) & (Kilotons)
- Table 16. World Dog Raw Food Production Value by Manufacturer (2021-2026) & (USD Million)
- Table 17. Production Value Market Share of Key Dog Raw Food Producers in 2025
- Table 18. World Dog Raw Food Production by Manufacturer (2021-2026) & (Kilotons)
- Table 19. Production Market Share of Key Dog Raw Food Producers in 2025
- Table 20. World Dog Raw Food Average Price by Manufacturer (2021-2026) & (US\$/Ton)
- Table 21. Global Dog Raw Food Company Evaluation Quadrant
- Table 22. World Dog Raw Food Industry Rank of Major Manufacturers, Based on Production Value in 2025
- Table 23. Head Office and Dog Raw Food Production Site of Key Manufacturer
- Table 24. Dog Raw Food Market: Company Product Type Footprint
- Table 25. Dog Raw Food Market: Company Product Application Footprint
- Table 26. Dog Raw Food Competitive Factors
- Table 27. Dog Raw Food New Entrant and Capacity Expansion Plans
- Table 28. Dog Raw Food Mergers & Acquisitions Activity
- Table 29. United States VS China Dog Raw Food Production Value Comparison, (2021

& 2025 & 2032) & (USD Million)

Table 30. United States VS China Dog Raw Food Production Comparison, (2021 & 2025 & 2032) & (Kilotons)

Table 31. United States VS China Dog Raw Food Consumption Comparison, (2021 & 2025 & 2032) & (Kilotons)

Table 32. United States Based Dog Raw Food Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Dog Raw Food Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Dog Raw Food Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Dog Raw Food Production (2021-2026) & (Kilotons)

Table 36. United States Based Manufacturers Dog Raw Food Production Market Share (2021-2026)

Table 37. China Based Dog Raw Food Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Dog Raw Food Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Dog Raw Food Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Dog Raw Food Production, (2021-2026) & (Kilotons)

Table 41. China Based Manufacturers Dog Raw Food Production Market Share (2021-2026)

Table 42. Rest of World Based Dog Raw Food Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Dog Raw Food Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Dog Raw Food Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Dog Raw Food Production, (2021-2026) & (Kilotons)

Table 46. Rest of World Based Manufacturers Dog Raw Food Production Market Share (2021-2026)

Table 47. World Dog Raw Food Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Dog Raw Food Production by Type (2021-2026) & (Kilotons)

Table 49. World Dog Raw Food Production by Type (2027-2032) & (Kilotons)

Table 50. World Dog Raw Food Production Value by Type (2021-2026) & (USD Million)

Table 51. World Dog Raw Food Production Value by Type (2027-2032) & (USD Million)

Table 52. World Dog Raw Food Average Price by Type (2021-2026) & (US\$/Ton)

Table 53. World Dog Raw Food Average Price by Type (2027-2032) & (US\$/Ton)

Table 54. World Dog Raw Food Production Value by Grain Formulation, (USD Million), 2021 & 2025 & 2032

Table 55. World Dog Raw Food Production by Grain Formulation (2021-2026) & (Kilotons)

Table 56. World Dog Raw Food Production by Grain Formulation (2027-2032) & (Kilotons)

Table 57. World Dog Raw Food Production Value by Grain Formulation (2021-2026) & (USD Million)

Table 58. World Dog Raw Food Production Value by Grain Formulation (2027-2032) & (USD Million)

Table 59. World Dog Raw Food Average Price by Grain Formulation (2021-2026) & (US\$/Ton)

Table 60. World Dog Raw Food Average Price by Grain Formulation (2027-2032) & (US\$/Ton)

Table 61. World Dog Raw Food Production Value by Life Stage, (USD Million), 2021 & 2025 & 2032

Table 62. World Dog Raw Food Production by Life Stage (2021-2026) & (Kilotons)

Table 63. World Dog Raw Food Production by Life Stage (2027-2032) & (Kilotons)

Table 64. World Dog Raw Food Production Value by Life Stage (2021-2026) & (USD Million)

Table 65. World Dog Raw Food Production Value by Life Stage (2027-2032) & (USD Million)

Table 66. World Dog Raw Food Average Price by Life Stage (2021-2026) & (US\$/Ton)

Table 67. World Dog Raw Food Average Price by Life Stage (2027-2032) & (US\$/Ton)

Table 68. World Dog Raw Food Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 69. World Dog Raw Food Production by Application (2021-2026) & (Kilotons)

Table 70. World Dog Raw Food Production by Application (2027-2032) & (Kilotons)

Table 71. World Dog Raw Food Production Value by Application (2021-2026) & (USD Million)

Table 72. World Dog Raw Food Production Value by Application (2027-2032) & (USD Million)

Table 73. World Dog Raw Food Average Price by Application (2021-2026) & (US\$/Ton)

Table 74. World Dog Raw Food Average Price by Application (2027-2032) & (US\$/Ton)

Table 75. Open Farm Basic Information, Manufacturing Base and Competitors

Table 76. Open Farm Major Business
Table 77. Open Farm Dog Raw Food Product and Services
Table 78. Open Farm Dog Raw Food Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 79. Open Farm Recent Developments/Updates
Table 80. Open Farm Competitive Strengths & Weaknesses
Table 81. The Honest Kitchen Basic Information, Manufacturing Base and Competitors
Table 82. The Honest Kitchen Major Business
Table 83. The Honest Kitchen Dog Raw Food Product and Services
Table 84. The Honest Kitchen Dog Raw Food Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 85. The Honest Kitchen Recent Developments/Updates
Table 86. The Honest Kitchen Competitive Strengths & Weaknesses
Table 87. ACANA Basic Information, Manufacturing Base and Competitors
Table 88. ACANA Major Business
Table 89. ACANA Dog Raw Food Product and Services
Table 90. ACANA Dog Raw Food Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 91. ACANA Recent Developments/Updates
Table 92. ACANA Competitive Strengths & Weaknesses
Table 93. Orijen Basic Information, Manufacturing Base and Competitors
Table 94. Orijen Major Business
Table 95. Orijen Dog Raw Food Product and Services
Table 96. Orijen Dog Raw Food Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 97. Orijen Recent Developments/Updates
Table 98. Orijen Competitive Strengths & Weaknesses
Table 99. Animonda Basic Information, Manufacturing Base and Competitors
Table 100. Animonda Major Business
Table 101. Animonda Dog Raw Food Product and Services
Table 102. Animonda Dog Raw Food Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 103. Animonda Recent Developments/Updates
Table 104. Animonda Competitive Strengths & Weaknesses
Table 105. Stella & Chewy?s Basic Information, Manufacturing Base and Competitors
Table 106. Stella & Chewy?s Major Business
Table 107. Stella & Chewy?s Dog Raw Food Product and Services
Table 108. Stella & Chewy?s Dog Raw Food Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 109. Stella & Chewy's Recent Developments/Updates
Table 110. Stella & Chewy's Competitive Strengths & Weaknesses
Table 111. BIO BISCUIT Basic Information, Manufacturing Base and Competitors
Table 112. BIO BISCUIT Major Business
Table 113. BIO BISCUIT Dog Raw Food Product and Services
Table 114. BIO BISCUIT Dog Raw Food Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 115. BIO BISCUIT Recent Developments/Updates
Table 116. BIO BISCUIT Competitive Strengths & Weaknesses
Table 117. Hill's Pet Nutrition Basic Information, Manufacturing Base and Competitors
Table 118. Hill's Pet Nutrition Major Business
Table 119. Hill's Pet Nutrition Dog Raw Food Product and Services
Table 120. Hill's Pet Nutrition Dog Raw Food Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 121. Hill's Pet Nutrition Recent Developments/Updates
Table 122. Hill's Pet Nutrition Competitive Strengths & Weaknesses
Table 123. Purina Basic Information, Manufacturing Base and Competitors
Table 124. Purina Major Business
Table 125. Purina Dog Raw Food Product and Services
Table 126. Purina Dog Raw Food Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 127. Purina Recent Developments/Updates
Table 128. Purina Competitive Strengths & Weaknesses
Table 129. Royal Canin Basic Information, Manufacturing Base and Competitors
Table 130. Royal Canin Major Business
Table 131. Royal Canin Dog Raw Food Product and Services
Table 132. Royal Canin Dog Raw Food Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 133. Royal Canin Recent Developments/Updates
Table 134. Royal Canin Competitive Strengths & Weaknesses
Table 135. Mars Petcare Basic Information, Manufacturing Base and Competitors
Table 136. Mars Petcare Major Business
Table 137. Mars Petcare Dog Raw Food Product and Services
Table 138. Mars Petcare Dog Raw Food Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 139. Mars Petcare Recent Developments/Updates
Table 140. Mars Petcare Competitive Strengths & Weaknesses
Table 141. Dalian Youchong Basic Information, Manufacturing Base and Competitors
Table 142. Dalian Youchong Major Business

Table 143. Dalian Youchong Dog Raw Food Product and Services

Table 144. Dalian Youchong Dog Raw Food Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 145. Dalian Youchong Recent Developments/Updates

Table 146. Dalian Youchong Competitive Strengths & Weaknesses

Table 147. FUBEI (SHANGHAI) Basic Information, Manufacturing Base and Competitors

Table 148. FUBEI (SHANGHAI) Major Business

Table 149. FUBEI (SHANGHAI) Dog Raw Food Product and Services

Table 150. FUBEI (SHANGHAI) Dog Raw Food Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 151. FUBEI (SHANGHAI) Recent Developments/Updates

Table 152. FUBEI (SHANGHAI) Competitive Strengths & Weaknesses

Table 153. Petpal Pet Nutrition Technology Basic Information, Manufacturing Base and Competitors

Table 154. Petpal Pet Nutrition Technology Major Business

Table 155. Petpal Pet Nutrition Technology Dog Raw Food Product and Services

Table 156. Petpal Pet Nutrition Technology Dog Raw Food Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 157. Petpal Pet Nutrition Technology Recent Developments/Updates

Table 158. Petpal Pet Nutrition Technology Competitive Strengths & Weaknesses

Table 159. Yantai China Pet Foods Basic Information, Manufacturing Base and Competitors

Table 160. Yantai China Pet Foods Major Business

Table 161. Yantai China Pet Foods Dog Raw Food Product and Services

Table 162. Yantai China Pet Foods Dog Raw Food Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 163. Yantai China Pet Foods Recent Developments/Updates

Table 164. Yantai China Pet Foods Competitive Strengths & Weaknesses

Table 165. Jasper Pet Care Products Basic Information, Manufacturing Base and Competitors

Table 166. Jasper Pet Care Products Major Business

Table 167. Jasper Pet Care Products Dog Raw Food Product and Services

Table 168. Jasper Pet Care Products Dog Raw Food Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 169. Jasper Pet Care Products Recent Developments/Updates

Table 170. Jasper Pet Care Products Competitive Strengths & Weaknesses
Table 171. PEPTIDO(Beijing) International Biotechnology Basic Information, Manufacturing Base and Competitors
Table 172. PEPTIDO(Beijing) International Biotechnology Major Business
Table 173. PEPTIDO(Beijing) International Biotechnology Dog Raw Food Product and Services
Table 174. PEPTIDO(Beijing) International Biotechnology Dog Raw Food Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 175. PEPTIDO(Beijing) International Biotechnology Recent Developments/Updates
Table 176. PEPTIDO(Beijing) International Biotechnology Competitive Strengths & Weaknesses
Table 177. Guaibao Pet Food Group Basic Information, Manufacturing Base and Competitors
Table 178. Guaibao Pet Food Group Major Business
Table 179. Guaibao Pet Food Group Dog Raw Food Product and Services
Table 180. Guaibao Pet Food Group Dog Raw Food Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 181. Guaibao Pet Food Group Recent Developments/Updates
Table 182. Guaibao Pet Food Group Competitive Strengths & Weaknesses
Table 183. Shanghai Bridge PetCare Basic Information, Manufacturing Base and Competitors
Table 184. Shanghai Bridge PetCare Major Business
Table 185. Shanghai Bridge PetCare Dog Raw Food Product and Services
Table 186. Shanghai Bridge PetCare Dog Raw Food Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 187. Shanghai Bridge PetCare Recent Developments/Updates
Table 188. Shanghai Bridge PetCare Competitive Strengths & Weaknesses
Table 189. Jiangsu JIA Pet Products Basic Information, Manufacturing Base and Competitors
Table 190. Jiangsu JIA Pet Products Major Business
Table 191. Jiangsu JIA Pet Products Dog Raw Food Product and Services
Table 192. Jiangsu JIA Pet Products Dog Raw Food Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 193. Jiangsu JIA Pet Products Recent Developments/Updates

Table 194. Jiangsu JIA Pet Products Competitive Strengths & Weaknesses
Table 195. Shenzhen Freeze-Dried Pet Products Basic Information, Manufacturing Base and Competitors
Table 196. Shenzhen Freeze-Dried Pet Products Major Business
Table 197. Shenzhen Freeze-Dried Pet Products Dog Raw Food Product and Services
Table 198. Shenzhen Freeze-Dried Pet Products Dog Raw Food Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 199. Shenzhen Freeze-Dried Pet Products Recent Developments/Updates
Table 200. Shenzhen Freeze-Dried Pet Products Competitive Strengths & Weaknesses
Table 201. Shanghai Navarch Pet Products Basic Information, Manufacturing Base and Competitors
Table 202. Shanghai Navarch Pet Products Major Business
Table 203. Shanghai Navarch Pet Products Dog Raw Food Product and Services
Table 204. Shanghai Navarch Pet Products Dog Raw Food Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 205. Shanghai Navarch Pet Products Recent Developments/Updates
Table 206. Shanghai Navarch Pet Products Competitive Strengths & Weaknesses
Table 207. Huaxing Pet Food Basic Information, Manufacturing Base and Competitors
Table 208. Huaxing Pet Food Major Business
Table 209. Huaxing Pet Food Dog Raw Food Product and Services
Table 210. Huaxing Pet Food Dog Raw Food Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 211. Huaxing Pet Food Recent Developments/Updates
Table 212. Huaxing Pet Food Competitive Strengths & Weaknesses
Table 213. Xingtai Nuode Pet Products Basic Information, Manufacturing Base and Competitors
Table 214. Xingtai Nuode Pet Products Major Business
Table 215. Xingtai Nuode Pet Products Dog Raw Food Product and Services
Table 216. Xingtai Nuode Pet Products Dog Raw Food Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 217. Xingtai Nuode Pet Products Recent Developments/Updates
Table 218. Xingtai Nuode Pet Products Competitive Strengths & Weaknesses
Table 219. Zhejiang Ji Chong Animal Nutrition Technology Basic Information, Manufacturing Base and Competitors
Table 220. Zhejiang Ji Chong Animal Nutrition Technology Major Business
Table 221. Zhejiang Ji Chong Animal Nutrition Technology Dog Raw Food Product and

Services

Table 222. Zhejiang Ji Chong Animal Nutrition Technology Dog Raw Food Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 223. Zhejiang Ji Chong Animal Nutrition Technology Recent Developments/Updates

Table 224. Zhejiang Ji Chong Animal Nutrition Technology Competitive Strengths & Weaknesses

Table 225. Shanghai Yiyun Pet Products Basic Information, Manufacturing Base and Competitors

Table 226. Shanghai Yiyun Pet Products Major Business

Table 227. Shanghai Yiyun Pet Products Dog Raw Food Product and Services

Table 228. Shanghai Yiyun Pet Products Dog Raw Food Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 229. Shanghai Yiyun Pet Products Recent Developments/Updates

Table 230. Shanghai Yiyun Pet Products Competitive Strengths & Weaknesses

Table 231. Shanghai Chongxing Pet Products Basic Information, Manufacturing Base and Competitors

Table 232. Shanghai Chongxing Pet Products Major Business

Table 233. Shanghai Chongxing Pet Products Dog Raw Food Product and Services

Table 234. Shanghai Chongxing Pet Products Dog Raw Food Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 235. Shanghai Chongxing Pet Products Recent Developments/Updates

Table 236. Shanghai Chongxing Pet Products Competitive Strengths & Weaknesses

Table 237. Shandong KERES Animal Nutrition Basic Information, Manufacturing Base and Competitors

Table 238. Shandong KERES Animal Nutrition Major Business

Table 239. Shandong KERES Animal Nutrition Dog Raw Food Product and Services

Table 240. Shandong KERES Animal Nutrition Dog Raw Food Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 241. Shandong KERES Animal Nutrition Recent Developments/Updates

Table 242. Shandong KERES Animal Nutrition Competitive Strengths & Weaknesses

Table 243. Global Key Players of Dog Raw Food Upstream (Raw Materials)

Table 244. Global Dog Raw Food Typical Customers

Table 245. Dog Raw Food Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. Dog Raw Food Picture

Figure 2. World Dog Raw Food Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Dog Raw Food Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Dog Raw Food Production (2021-2032) & (Kilotons)

Figure 5. World Dog Raw Food Average Price (2021-2032) & (US\$/Ton)

Figure 6. World Dog Raw Food Production Value Market Share by Region (2021-2032)

Figure 7. World Dog Raw Food Production Market Share by Region (2021-2032)

Figure 8. North America Dog Raw Food Production (2021-2032) & (Kilotons)

Figure 9. Europe Dog Raw Food Production (2021-2032) & (Kilotons)

Figure 10. China Dog Raw Food Production (2021-2032) & (Kilotons)

Figure 11. Dog Raw Food Market Drivers

Figure 12. Factors Affecting Demand

Figure 13. World Dog Raw Food Consumption (2021-2032) & (Kilotons)

Figure 14. World Dog Raw Food Consumption Market Share by Region (2021-2032)

Figure 15. United States Dog Raw Food Consumption (2021-2032) & (Kilotons)

Figure 16. China Dog Raw Food Consumption (2021-2032) & (Kilotons)

Figure 17. Europe Dog Raw Food Consumption (2021-2032) & (Kilotons)

Figure 18. Japan Dog Raw Food Consumption (2021-2032) & (Kilotons)

Figure 19. South Korea Dog Raw Food Consumption (2021-2032) & (Kilotons)

Figure 20. ASEAN Dog Raw Food Consumption (2021-2032) & (Kilotons)

Figure 21. India Dog Raw Food Consumption (2021-2032) & (Kilotons)

Figure 22. Producer Shipments of Dog Raw Food by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 23. Global Four-firm Concentration Ratios (CR4) for Dog Raw Food Markets in 2025

Figure 24. Global Four-firm Concentration Ratios (CR8) for Dog Raw Food Markets in 2025

Figure 25. United States VS China: Dog Raw Food Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 26. United States VS China: Dog Raw Food Production Market Share Comparison (2021 & 2025 & 2032)

Figure 27. United States VS China: Dog Raw Food Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States Based Manufacturers Dog Raw Food Production Market Share

2025

Figure 29. China Based Manufacturers Dog Raw Food Production Market Share 2025

Figure 30. Rest of World Based Manufacturers Dog Raw Food Production Market Share 2025

Figure 31. World Dog Raw Food Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 32. World Dog Raw Food Production Value Market Share by Type in 2025

Figure 33. Frozen Food

Figure 34. Freeze-Dried Food

Figure 35. World Dog Raw Food Production Market Share by Type (2021-2032)

Figure 36. World Dog Raw Food Production Value Market Share by Type (2021-2032)

Figure 37. World Dog Raw Food Average Price by Type (2021-2032) & (US\$/Ton)

Figure 38. World Dog Raw Food Production Value by Grain Formulation, (USD Million), 2021 & 2025 & 2032

Figure 39. World Dog Raw Food Production Value Market Share by Grain Formulation in 2025

Figure 40. Grain-inclusive

Figure 41. Grain-free

Figure 42. World Dog Raw Food Production Market Share by Grain Formulation (2021-2032)

Figure 43. World Dog Raw Food Production Value Market Share by Grain Formulation (2021-2032)

Figure 44. World Dog Raw Food Average Price by Grain Formulation (2021-2032) & (US\$/Ton)

Figure 45. World Dog Raw Food Production Value by Life Stage, (USD Million), 2021 & 2025 & 2032

Figure 46. World Dog Raw Food Production Value Market Share by Life Stage in 2025

Figure 47. Kitten

Figure 48. Adult

Figure 49. World Dog Raw Food Production Market Share by Life Stage (2021-2032)

Figure 50. World Dog Raw Food Production Value Market Share by Life Stage (2021-2032)

Figure 51. World Dog Raw Food Average Price by Life Stage (2021-2032) & (US\$/Ton)

Figure 52. World Dog Raw Food Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 53. World Dog Raw Food Production Value Market Share by Application in 2025

Figure 54. Puppy

Figure 55. Senior Dogs

Figure 56. Medium Dogs

Figure 57. World Dog Raw Food Production Market Share by Application (2021-2032)

Figure 58. World Dog Raw Food Production Value Market Share by Application (2021-2032)

Figure 59. World Dog Raw Food Average Price by Application (2021-2032) & (US\$/Ton)

Figure 60. Dog Raw Food Industry Chain

Figure 61. Dog Raw Food Procurement Model

Figure 62. Dog Raw Food Sales Model

Figure 63. Dog Raw Food Sales Channels, Direct Sales, and Distribution

Figure 64. Methodology

Figure 65. Research Process and Data Source

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