

Global Grain-free Wet Dog Foods Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Grain-free Wet Dog Foods market size is expected to reach \$ 23412 million by 2032, rising at a market growth of 6.1% CAGR during the forecast period (2026-2032).

In 2025, global sales volume of grain-free wet dog food is estimated at approximately 2.68 million tons, with an average selling price of around USD 5,850 per ton. Grain-free wet dog food is a category of canine pet food products that exclude grains such as wheat, corn, barley, and oats, using meat, fish, or animal by-products as primary protein sources and produced through canned, pouch, or retort wet-processing technologies. It is positioned in the mid-to-high-end functional pet food segment, targeting dogs with grain sensitivity, digestive weakness, picky eating behavior, or higher hydration needs. The product is characterized by high moisture content (around 70%-85%), high palatability, and high animal protein inclusion, often using potatoes, sweet potatoes, or legumes as carbohydrate substitutes to maintain nutritional balance under grain-free formulations. Compared with conventional wet dog food, grain-free wet formulations place greater emphasis on hypoallergenic properties and digestive friendliness, while continuously upgrading in meat content, functional nutrition, and natural ingredient positioning, resulting in significantly higher pricing. Current product structures include single-protein grain-free wet food, limited-ingredient grain-free wet food, and functional wet food variants such as gastrointestinal care, skin care, and weight management, with the industry evolving toward high-meat, limited-ingredient, grain-free, and functional integrated nutrition systems.

Grain-free wet dog food is a cross-category segment combining wet dog food and grain-free functional positioning, driven primarily by premiumization trends in pet food, gastrointestinal health management needs, and palatability requirements. North

America, Europe, and Japan are the core consumption markets, while China's premium segment is growing rapidly but remains in an early penetration stage. The category mainly targets small-breed dogs, senior dogs, and indoor pets, which require higher moisture intake, easier digestion, and improved palatability, thereby increasing penetration in the premium dog food market. The competitive landscape is dominated by global pet food companies such as Royal Canin, Hill's, Purina, and Blue Buffalo, while regional brands compete through high-meat-content and natural formulations. Wet food production is highly dependent on canned and retort packaging capacity, with supply chains concentrated in North America, Europe, and selected Asian OEM hubs. The industry is shifting from "grain-free as a marketing claim" toward "functional nutrition-driven positioning," with high meat content, single-protein formulations, gastrointestinal health, and allergy management becoming key upgrade directions, while it is widely recognized that grain-free itself is not inherently healthier and its value depends on overall formulation quality.

This report studies the global Grain-free Wet Dog Foods production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Grain-free Wet Dog Foods 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 Grain-free Wet Dog Foods that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Grain-free Wet Dog Foods total production and demand, 2021-2032, (Kilotons)

Global Grain-free Wet Dog Foods total production value, 2021-2032, (USD Million)

Global Grain-free Wet Dog Foods production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons), (based on production site)

Global Grain-free Wet Dog Foods consumption by region & country, CAGR, 2021-2032 & (Kilotons)

U.S. VS China: Grain-free Wet Dog Foods domestic production, consumption, key domestic manufacturers and share

Global Grain-free Wet Dog Foods production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Kilotons)

Global Grain-free Wet Dog Foods production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

Global Grain-free Wet Dog Foods production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

This report profiles key players in the global Gain-free Wet Dog Foods 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 Gain-free Wet Dog Foods 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 Gain-free Wet Dog Foods Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Gain-free Wet Dog Foods Market, Segmentation by Type:

Canned

Bagged

Global Gain-free Wet Dog Foods Market, Segmentation by Formulation:

Organic

Inorganic

Global Gain-free Wet Dog Foods Market, Segmentation by Life Stage:

Kitten

Adult

Global Gain-free Wet Dog Foods Market, Segmentation by Application:

Online Sale

Offline Sale

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 Gain-free Wet Dog Foods market?
2. What is the demand of the global Gain-free Wet Dog Foods market?
3. What is the year over year growth of the global Gain-free Wet Dog Foods market?
4. What is the production and production value of the global Gain-free Wet Dog Foods market?
5. Who are the key producers in the global Gain-free Wet Dog Foods market?
6. What are the growth factors driving the market demand?

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