

Global Grain-free Dry Dog ??Food Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Grain-free Dry Dog ??Food market size is expected to reach \$ 69133 million by 2032, rising at a market growth of 7.2% CAGR during the forecast period (2026-2032).

In 2025, global sales production for grain-free dry dog ??food reached 9.8 million tons, with an average selling price of \$4,200 per ton. Grain-free dry dog ??food refers to pet food formulated without cereal ingredients?such as corn, wheat, or soy?and produced primarily using meat proteins, tubers, legumes, or other alternative carbohydrates through extrusion or baking processes. Designed to mitigate the risk of grain allergies in pets and increase protein intake, this category is characterized by high palatability, high nutrient density, and a distinct trend toward functionalization; it is widely utilized within the mid-to-high-end pet food market.

The upstream supply chain primarily comprises suppliers of raw materials such as chicken, beef, fish meal, potatoes, pea protein, fats and oils, and various additives. Downstream distribution channels involve sales to pet owners through pet food brands, e-commerce platforms, and specialized pet retail stores. The total global production capacity for grain-free dry dog ??food stands at approximately 11.5 million tons per year, with the industry maintaining a gross profit margin of roughly 32% to 40%.

Looking ahead, as the trend of 'humanizing' pets deepens and the philosophy of healthy feeding becomes more widespread, grain-free formulations will continue to evolve toward functionalization, precision nutrition, and natural/organic profiles. Concurrently, enhanced brand premium capabilities and channel diversification?such as subscription services and direct-to-consumer e-commerce?will open up new avenues for growth. Consequently, the industry presents significant business opportunities in the areas of

differentiated formula R&D and brand building.

The market for grain-free dry dog food is currently experiencing rapid growth, driven primarily by pet owners' increasing emphasis on pet health management. As the pet food industry evolves toward premiumization and nutritionally precise formulations, an increasing number of pet owners are opting for grain-free recipes—particularly amidst heightened concerns regarding pet allergies, digestive issues, and food sensitivities. Grain-free dry dog food not only meets pets' nutritional requirements but also reduces reliance on traditional grains and helps avoid potential allergens, thereby endowing it with a unique competitive advantage within the market. This is especially true in the mid-to-high-end market segments, where consumers are willing to pay a premium for pet foods that are natural, healthy, and functionally superior; this willingness to pay has been a key driver behind the growing demand for grain-free dry dog food. Concurrently, alongside the broader trend of consumption upgrading within the pet industry, online e-commerce platforms have emerged as critical sales channels; furthermore, the rise of business models such as subscription services and personalized customization has further diversified the distribution landscape for grain-free dry dog food.

Looking ahead, as consumer demand for natural, additive-free, low-carbohydrate, and high-protein formulations continues to rise, grain-free dry dog food is poised to maintain a prominent position within the pet food market, evolving toward even greater specialization and functional efficacy. At the same time, the level of acceptance for pet food products is gradually rising within domestic markets—particularly in China and other emerging economies. Driven by the growing popularity of pet culture and rising disposable incomes, the market for grain-free dry dog food holds immense potential, promising the industry a wealth of new opportunities for innovation and business expansion.

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

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

Highlights and key features of the study

Global Grain-free Dry Dog ??Food total production and demand, 2021-2032, (Kilotons)
Global Grain-free Dry Dog ??Food total production value, 2021-2032, (USD Million)
Global Grain-free Dry Dog ??Food production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons), (based on production site)
Global Grain-free Dry Dog ??Food consumption by region & country, CAGR, 2021-2032 & (Kilotons)
U.S. VS China: Grain-free Dry Dog ??Food domestic production, consumption, key domestic manufacturers and share
Global Grain-free Dry Dog ??Food production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Kilotons)
Global Grain-free Dry Dog ??Food production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)
Global Grain-free Dry Dog ??Food production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

This report profiles key players in the global Grain-free Dry Dog ??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 Canagan, Laughing Dog Food, Diamond Naturals, Whiskers N Paws, Eukanuba, Wholesomes Pet Food, Kudo Pet food, Naturo Pet Food, Vetalogica, Forthglade, 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 Grain-free Dry Dog ??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 Grain-free Dry Dog ??Food Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Grain-free Dry Dog ??Food Market, Segmentation by Type:

Bean-based

Tuber-based

Global Grain-free Dry Dog ??Food Market, Segmentation by Dog Body Type:

Grain-Free Food for Small Dogs

Grain-Free Food for Medium Dogs

Grain-Free Food for Large Dogs

Global Grain-free Dry Dog ??Food Market, Segmentation by Age Group:

Grain-Free Puppy Food

Grain-Free Adult Dog Food

Grain-Free Senior Dog Food

Global Grain-free Dry Dog Food Market, Segmentation by Application:

Online Sales

Offline Sales

Companies Profiled:

Canagan

Laughing Dog Food

Diamond Naturals

Whiskers N Paws

Eukanuba

Wholesomes Pet Food

Kudo Pet food

Naturo Pet Food

Vetalogica

Forthglade

Nature's Recipe

Petcurean

Oven-Baked Tradition

Earthborn Holistic Pet Food

Addiction Pet Foods

Merrick

Key Questions Answered:

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

Contents

1 SUPPLY SUMMARY

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

2 DEMAND SUMMARY

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

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World Grain-free Dry Dog ??Food Production Value by Manufacturer (2021-2026)
- 3.2 World Grain-free Dry Dog ??Food Production by Manufacturer (2021-2026)
- 3.3 World Grain-free Dry Dog ??Food Average Price by Manufacturer (2021-2026)
- 3.4 Grain-free Dry Dog ??Food Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
 - 3.5.1 Global Grain-free Dry Dog ??Food Industry Rank of Major Manufacturers
 - 3.5.2 Global Concentration Ratios (CR4) for Grain-free Dry Dog ??Food in 2025
 - 3.5.3 Global Concentration Ratios (CR8) for Grain-free Dry Dog ??Food in 2025
- 3.6 Grain-free Dry Dog ??Food Market: Overall Company Footprint Analysis
 - 3.6.1 Grain-free Dry Dog ??Food Market: Region Footprint
 - 3.6.2 Grain-free Dry Dog ??Food Market: Company Product Type Footprint
 - 3.6.3 Grain-free Dry Dog ??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: Grain-free Dry Dog ??Food Production Value Comparison
 - 4.1.1 United States VS China: Grain-free Dry Dog ??Food Production Value Comparison (2021 & 2025 & 2032)
 - 4.1.2 United States VS China: Grain-free Dry Dog ??Food Production Value Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States VS China: Grain-free Dry Dog ??Food Production Comparison
 - 4.2.1 United States VS China: Grain-free Dry Dog ??Food Production Comparison (2021 & 2025 & 2032)
 - 4.2.2 United States VS China: Grain-free Dry Dog ??Food Production Market Share Comparison (2021 & 2025 & 2032)
- 4.3 United States VS China: Grain-free Dry Dog ??Food Consumption Comparison
 - 4.3.1 United States VS China: Grain-free Dry Dog ??Food Consumption Comparison (2021 & 2025 & 2032)
 - 4.3.2 United States VS China: Grain-free Dry Dog ??Food Consumption Market Share Comparison (2021 & 2025 & 2032)
- 4.4 United States Based Grain-free Dry Dog ??Food Manufacturers and Market Share, 2021-2026
 - 4.4.1 United States Based Grain-free Dry Dog ??Food Manufacturers, Headquarters

and Production Site (States, Country)

4.4.2 United States Based Manufacturers Grain-free Dry Dog ??Food Production Value (2021-2026)

4.4.3 United States Based Manufacturers Grain-free Dry Dog ??Food Production (2021-2026)

4.5 China Based Grain-free Dry Dog ??Food Manufacturers and Market Share

4.5.1 China Based Grain-free Dry Dog ??Food Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Grain-free Dry Dog ??Food Production Value (2021-2026)

4.5.3 China Based Manufacturers Grain-free Dry Dog ??Food Production (2021-2026)

4.6 Rest of World Based Grain-free Dry Dog ??Food Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Grain-free Dry Dog ??Food Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Grain-free Dry Dog ??Food Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Grain-free Dry Dog ??Food Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Grain-free Dry Dog ??Food Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Bean-based

5.2.2 Tuber-based

5.3 Market Segment by Type

5.3.1 World Grain-free Dry Dog ??Food Production by Type (2021-2032)

5.3.2 World Grain-free Dry Dog ??Food Production Value by Type (2021-2032)

5.3.3 World Grain-free Dry Dog ??Food Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY DOG BODY TYPE

6.1 World Grain-free Dry Dog ??Food Market Size Overview by Dog Body Type: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Dog Body Type

6.2.1 Grain-Free Food for Small Dogs

6.2.2 Grain-Free Food for Medium Dogs

- 6.2.3 Grain-Free Food for Large Dogs
- 6.3 Market Segment by Dog Body Type
 - 6.3.1 World Grain-free Dry Dog ??Food Production by Dog Body Type (2021-2032)
 - 6.3.2 World Grain-free Dry Dog ??Food Production Value by Dog Body Type (2021-2032)
 - 6.3.3 World Grain-free Dry Dog ??Food Average Price by Dog Body Type (2021-2032)

7 MARKET ANALYSIS BY AGE GROUP

- 7.1 World Grain-free Dry Dog ??Food Market Size Overview by Age Group: 2021 VS 2025 VS 2032
- 7.2 Segment Introduction by Age Group
 - 7.2.1 Grain-Free Puppy Food
 - 7.2.2 Grain-Free Adult Dog Food
 - 7.2.3 Grain-Free Senior Dog Food
- 7.3 Market Segment by Age Group
 - 7.3.1 World Grain-free Dry Dog ??Food Production by Age Group (2021-2032)
 - 7.3.2 World Grain-free Dry Dog ??Food Production Value by Age Group (2021-2032)
 - 7.3.3 World Grain-free Dry Dog ??Food Average Price by Age Group (2021-2032)

8 MARKET ANALYSIS BY APPLICATION

- 8.1 World Grain-free Dry Dog ??Food Market Size Overview by Application: 2021 VS 2025 VS 2032
- 8.2 Segment Introduction by Application
 - 8.2.1 Online Sales
 - 8.2.2 Offline Sales
- 8.3 Market Segment by Application
 - 8.3.1 World Grain-free Dry Dog ??Food Production by Application (2021-2032)
 - 8.3.2 World Grain-free Dry Dog ??Food Production Value by Application (2021-2032)
 - 8.3.3 World Grain-free Dry Dog ??Food Average Price by Application (2021-2032)

9 COMPANY PROFILES

- 9.1 Canagan
 - 9.1.1 Canagan Details
 - 9.1.2 Canagan Major Business
 - 9.1.3 Canagan Grain-free Dry Dog ??Food Product and Services
 - 9.1.4 Canagan Grain-free Dry Dog ??Food Production, Price, Value, Gross Margin

and Market Share (2021-2026)

9.1.5 Canagan Recent Developments/Updates

9.1.6 Canagan Competitive Strengths & Weaknesses

9.2 Laughing Dog Food

9.2.1 Laughing Dog Food Details

9.2.2 Laughing Dog Food Major Business

9.2.3 Laughing Dog Food Grain-free Dry Dog ??Food Product and Services

9.2.4 Laughing Dog Food Grain-free Dry Dog ??Food Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.2.5 Laughing Dog Food Recent Developments/Updates

9.2.6 Laughing Dog Food Competitive Strengths & Weaknesses

9.3 Diamond Naturals

9.3.1 Diamond Naturals Details

9.3.2 Diamond Naturals Major Business

9.3.3 Diamond Naturals Grain-free Dry Dog ??Food Product and Services

9.3.4 Diamond Naturals Grain-free Dry Dog ??Food Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.3.5 Diamond Naturals Recent Developments/Updates

9.3.6 Diamond Naturals Competitive Strengths & Weaknesses

9.4 Whiskers N Paws

9.4.1 Whiskers N Paws Details

9.4.2 Whiskers N Paws Major Business

9.4.3 Whiskers N Paws Grain-free Dry Dog ??Food Product and Services

9.4.4 Whiskers N Paws Grain-free Dry Dog ??Food Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.4.5 Whiskers N Paws Recent Developments/Updates

9.4.6 Whiskers N Paws Competitive Strengths & Weaknesses

9.5 Eukanuba

9.5.1 Eukanuba Details

9.5.2 Eukanuba Major Business

9.5.3 Eukanuba Grain-free Dry Dog ??Food Product and Services

9.5.4 Eukanuba Grain-free Dry Dog ??Food Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.5.5 Eukanuba Recent Developments/Updates

9.5.6 Eukanuba Competitive Strengths & Weaknesses

9.6 Wholesomes Pet Food

9.6.1 Wholesomes Pet Food Details

9.6.2 Wholesomes Pet Food Major Business

9.6.3 Wholesomes Pet Food Grain-free Dry Dog ??Food Product and Services

9.6.4 Wholesomes Pet Food Grain-free Dry Dog ??Food Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.6.5 Wholesomes Pet Food Recent Developments/Updates

9.6.6 Wholesomes Pet Food Competitive Strengths & Weaknesses

9.7 Kudo Pet food

9.7.1 Kudo Pet food Details

9.7.2 Kudo Pet food Major Business

9.7.3 Kudo Pet food Grain-free Dry Dog ??Food Product and Services

9.7.4 Kudo Pet food Grain-free Dry Dog ??Food Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.7.5 Kudo Pet food Recent Developments/Updates

9.7.6 Kudo Pet food Competitive Strengths & Weaknesses

9.8 Naturo Pet Food

9.8.1 Naturo Pet Food Details

9.8.2 Naturo Pet Food Major Business

9.8.3 Naturo Pet Food Grain-free Dry Dog ??Food Product and Services

9.8.4 Naturo Pet Food Grain-free Dry Dog ??Food Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.8.5 Naturo Pet Food Recent Developments/Updates

9.8.6 Naturo Pet Food Competitive Strengths & Weaknesses

9.9 Vetalogica

9.9.1 Vetalogica Details

9.9.2 Vetalogica Major Business

9.9.3 Vetalogica Grain-free Dry Dog ??Food Product and Services

9.9.4 Vetalogica Grain-free Dry Dog ??Food Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.9.5 Vetalogica Recent Developments/Updates

9.9.6 Vetalogica Competitive Strengths & Weaknesses

9.10 Forthglade

9.10.1 Forthglade Details

9.10.2 Forthglade Major Business

9.10.3 Forthglade Grain-free Dry Dog ??Food Product and Services

9.10.4 Forthglade Grain-free Dry Dog ??Food Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.10.5 Forthglade Recent Developments/Updates

9.10.6 Forthglade Competitive Strengths & Weaknesses

9.11 Nature's Recipe

9.11.1 Nature's Recipe Details

9.11.2 Nature's Recipe Major Business

- 9.11.3 Nature's Recipe Grain-free Dry Dog ??Food Product and Services
- 9.11.4 Nature's Recipe Grain-free Dry Dog ??Food Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.11.5 Nature's Recipe Recent Developments/Updates
- 9.11.6 Nature's Recipe Competitive Strengths & Weaknesses
- 9.12 Petcurean
 - 9.12.1 Petcurean Details
 - 9.12.2 Petcurean Major Business
 - 9.12.3 Petcurean Grain-free Dry Dog ??Food Product and Services
 - 9.12.4 Petcurean Grain-free Dry Dog ??Food Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.12.5 Petcurean Recent Developments/Updates
 - 9.12.6 Petcurean Competitive Strengths & Weaknesses
- 9.13 Oven-Baked Tradition
 - 9.13.1 Oven-Baked Tradition Details
 - 9.13.2 Oven-Baked Tradition Major Business
 - 9.13.3 Oven-Baked Tradition Grain-free Dry Dog ??Food Product and Services
 - 9.13.4 Oven-Baked Tradition Grain-free Dry Dog ??Food Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.13.5 Oven-Baked Tradition Recent Developments/Updates
 - 9.13.6 Oven-Baked Tradition Competitive Strengths & Weaknesses
- 9.14 Earthborn Holistic Pet Food
 - 9.14.1 Earthborn Holistic Pet Food Details
 - 9.14.2 Earthborn Holistic Pet Food Major Business
 - 9.14.3 Earthborn Holistic Pet Food Grain-free Dry Dog ??Food Product and Services
 - 9.14.4 Earthborn Holistic Pet Food Grain-free Dry Dog ??Food Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.14.5 Earthborn Holistic Pet Food Recent Developments/Updates
 - 9.14.6 Earthborn Holistic Pet Food Competitive Strengths & Weaknesses
- 9.15 Addiction Pet Foods
 - 9.15.1 Addiction Pet Foods Details
 - 9.15.2 Addiction Pet Foods Major Business
 - 9.15.3 Addiction Pet Foods Grain-free Dry Dog ??Food Product and Services
 - 9.15.4 Addiction Pet Foods Grain-free Dry Dog ??Food Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.15.5 Addiction Pet Foods Recent Developments/Updates
 - 9.15.6 Addiction Pet Foods Competitive Strengths & Weaknesses
- 9.16 Merrick
 - 9.16.1 Merrick Details

- 9.16.2 Merrick Major Business
- 9.16.3 Merrick Grain-free Dry Dog ??Food Product and Services
- 9.16.4 Merrick Grain-free Dry Dog ??Food Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.16.5 Merrick Recent Developments/Updates
- 9.16.6 Merrick Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

- 10.1 Grain-free Dry Dog ??Food Industry Chain
- 10.2 Grain-free Dry Dog ??Food Upstream Analysis
 - 10.2.1 Grain-free Dry Dog ??Food Core Raw Materials
 - 10.2.2 Main Manufacturers of Grain-free Dry Dog ??Food Core Raw Materials
- 10.3 Midstream Analysis
- 10.4 Downstream Analysis
- 10.5 Grain-free Dry Dog ??Food Production Mode
- 10.6 Grain-free Dry Dog ??Food Procurement Model
- 10.7 Grain-free Dry Dog ??Food Industry Sales Model and Sales Channels
 - 10.7.1 Grain-free Dry Dog ??Food Sales Model
 - 10.7.2 Grain-free Dry Dog ??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 Grain-free Dry Dog ??Food Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World Grain-free Dry Dog ??Food Production Value by Region (2021-2026) & (USD Million)

Table 3. World Grain-free Dry Dog ??Food Production Value by Region (2027-2032) & (USD Million)

Table 4. World Grain-free Dry Dog ??Food Production Value Market Share by Region (2021-2026)

Table 5. World Grain-free Dry Dog ??Food Production Value Market Share by Region (2027-2032)

Table 6. World Grain-free Dry Dog ??Food Production by Region (2021-2026) & (Kilotons)

Table 7. World Grain-free Dry Dog ??Food Production by Region (2027-2032) & (Kilotons)

Table 8. World Grain-free Dry Dog ??Food Production Market Share by Region (2021-2026)

Table 9. World Grain-free Dry Dog ??Food Production Market Share by Region (2027-2032)

Table 10. World Grain-free Dry Dog ??Food Average Price by Region (2021-2026) & (US\$/Ton)

Table 11. World Grain-free Dry Dog ??Food Average Price by Region (2027-2032) & (US\$/Ton)

Table 12. Grain-free Dry Dog ??Food Major Market Trends

Table 13. World Grain-free Dry Dog ??Food Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Kilotons)

Table 14. World Grain-free Dry Dog ??Food Consumption by Region (2021-2026) & (Kilotons)

Table 15. World Grain-free Dry Dog ??Food Consumption Forecast by Region (2027-2032) & (Kilotons)

Table 16. World Grain-free Dry Dog ??Food Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Grain-free Dry Dog ??Food Producers in 2025

Table 18. World Grain-free Dry Dog ??Food Production by Manufacturer (2021-2026) & (Kilotons)

Table 19. Production Market Share of Key Grain-free Dry Dog ??Food Producers in 2025

Table 20. World Grain-free Dry Dog ??Food Average Price by Manufacturer (2021-2026) & (US\$/Ton)

Table 21. Global Grain-free Dry Dog ??Food Company Evaluation Quadrant

Table 22. World Grain-free Dry Dog ??Food Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Grain-free Dry Dog ??Food Production Site of Key Manufacturer

Table 24. Grain-free Dry Dog ??Food Market: Company Product Type Footprint

Table 25. Grain-free Dry Dog ??Food Market: Company Product Application Footprint

Table 26. Grain-free Dry Dog ??Food Competitive Factors

Table 27. Grain-free Dry Dog ??Food New Entrant and Capacity Expansion Plans

Table 28. Grain-free Dry Dog ??Food Mergers & Acquisitions Activity

Table 29. United States VS China Grain-free Dry Dog ??Food Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Grain-free Dry Dog ??Food Production Comparison, (2021 & 2025 & 2032) & (Kilotons)

Table 31. United States VS China Grain-free Dry Dog ??Food Consumption Comparison, (2021 & 2025 & 2032) & (Kilotons)

Table 32. United States Based Grain-free Dry Dog ??Food Manufacturers, Headquarters and Production Site (States, Country)

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

Table 34. United States Based Manufacturers Grain-free Dry Dog ??Food Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Grain-free Dry Dog ??Food Production (2021-2026) & (Kilotons)

Table 36. United States Based Manufacturers Grain-free Dry Dog ??Food Production Market Share (2021-2026)

Table 37. China Based Grain-free Dry Dog ??Food Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Grain-free Dry Dog ??Food Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Grain-free Dry Dog ??Food Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Grain-free Dry Dog ??Food Production, (2021-2026) & (Kilotons)

Table 41. China Based Manufacturers Grain-free Dry Dog ??Food Production Market

Share (2021-2026)

Table 42. Rest of World Based Grain-free Dry Dog ??Food Manufacturers, Headquarters and Production Site (State, Country)

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

Table 44. Rest of World Based Manufacturers Grain-free Dry Dog ??Food Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Grain-free Dry Dog ??Food Production, (2021-2026) & (Kilotons)

Table 46. Rest of World Based Manufacturers Grain-free Dry Dog ??Food Production Market Share (2021-2026)

Table 47. World Grain-free Dry Dog ??Food Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Grain-free Dry Dog ??Food Production by Type (2021-2026) & (Kilotons)

Table 49. World Grain-free Dry Dog ??Food Production by Type (2027-2032) & (Kilotons)

Table 50. World Grain-free Dry Dog ??Food Production Value by Type (2021-2026) & (USD Million)

Table 51. World Grain-free Dry Dog ??Food Production Value by Type (2027-2032) & (USD Million)

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

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

Table 54. World Grain-free Dry Dog ??Food Production Value by Dog Body Type, (USD Million), 2021 & 2025 & 2032

Table 55. World Grain-free Dry Dog ??Food Production by Dog Body Type (2021-2026) & (Kilotons)

Table 56. World Grain-free Dry Dog ??Food Production by Dog Body Type (2027-2032) & (Kilotons)

Table 57. World Grain-free Dry Dog ??Food Production Value by Dog Body Type (2021-2026) & (USD Million)

Table 58. World Grain-free Dry Dog ??Food Production Value by Dog Body Type (2027-2032) & (USD Million)

Table 59. World Grain-free Dry Dog ??Food Average Price by Dog Body Type (2021-2026) & (US\$/Ton)

Table 60. World Grain-free Dry Dog ??Food Average Price by Dog Body Type (2027-2032) & (US\$/Ton)

Table 61. World Grain-free Dry Dog ??Food Production Value by Age Group, (USD Million), 2021 & 2025 & 2032

Table 62. World Grain-free Dry Dog ??Food Production by Age Group (2021-2026) & (Kilotons)

Table 63. World Grain-free Dry Dog ??Food Production by Age Group (2027-2032) & (Kilotons)

Table 64. World Grain-free Dry Dog ??Food Production Value by Age Group (2021-2026) & (USD Million)

Table 65. World Grain-free Dry Dog ??Food Production Value by Age Group (2027-2032) & (USD Million)

Table 66. World Grain-free Dry Dog ??Food Average Price by Age Group (2021-2026) & (US\$/Ton)

Table 67. World Grain-free Dry Dog ??Food Average Price by Age Group (2027-2032) & (US\$/Ton)

Table 68. World Grain-free Dry Dog ??Food Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 69. World Grain-free Dry Dog ??Food Production by Application (2021-2026) & (Kilotons)

Table 70. World Grain-free Dry Dog ??Food Production by Application (2027-2032) & (Kilotons)

Table 71. World Grain-free Dry Dog ??Food Production Value by Application (2021-2026) & (USD Million)

Table 72. World Grain-free Dry Dog ??Food Production Value by Application (2027-2032) & (USD Million)

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

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

Table 75. Canagan Basic Information, Manufacturing Base and Competitors

Table 76. Canagan Major Business

Table 77. Canagan Grain-free Dry Dog ??Food Product and Services

Table 78. Canagan Grain-free Dry Dog ??Food Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. Canagan Recent Developments/Updates

Table 80. Canagan Competitive Strengths & Weaknesses

Table 81. Laughing Dog Food Basic Information, Manufacturing Base and Competitors

Table 82. Laughing Dog Food Major Business

Table 83. Laughing Dog Food Grain-free Dry Dog ??Food Product and Services

Table 84. Laughing Dog Food Grain-free Dry Dog ??Food Production (Kilotons), Price

(US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 85. Laughing Dog Food Recent Developments/Updates

Table 86. Laughing Dog Food Competitive Strengths & Weaknesses

Table 87. Diamond Naturals Basic Information, Manufacturing Base and Competitors

Table 88. Diamond Naturals Major Business

Table 89. Diamond Naturals Grain-free Dry Dog ??Food Product and Services

Table 90. Diamond Naturals Grain-free Dry Dog ??Food Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 91. Diamond Naturals Recent Developments/Updates

Table 92. Diamond Naturals Competitive Strengths & Weaknesses

Table 93. Whiskers N Paws Basic Information, Manufacturing Base and Competitors

Table 94. Whiskers N Paws Major Business

Table 95. Whiskers N Paws Grain-free Dry Dog ??Food Product and Services

Table 96. Whiskers N Paws Grain-free Dry Dog ??Food Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 97. Whiskers N Paws Recent Developments/Updates

Table 98. Whiskers N Paws Competitive Strengths & Weaknesses

Table 99. Eukanuba Basic Information, Manufacturing Base and Competitors

Table 100. Eukanuba Major Business

Table 101. Eukanuba Grain-free Dry Dog ??Food Product and Services

Table 102. Eukanuba Grain-free Dry Dog ??Food Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 103. Eukanuba Recent Developments/Updates

Table 104. Eukanuba Competitive Strengths & Weaknesses

Table 105. Wholesomes Pet Food Basic Information, Manufacturing Base and Competitors

Table 106. Wholesomes Pet Food Major Business

Table 107. Wholesomes Pet Food Grain-free Dry Dog ??Food Product and Services

Table 108. Wholesomes Pet Food Grain-free Dry Dog ??Food Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 109. Wholesomes Pet Food Recent Developments/Updates

Table 110. Wholesomes Pet Food Competitive Strengths & Weaknesses

Table 111. Kudo Pet food Basic Information, Manufacturing Base and Competitors

Table 112. Kudo Pet food Major Business

- Table 113. Kudo Pet food Grain-free Dry Dog ??Food Product and Services
- Table 114. Kudo Pet food Grain-free Dry Dog ??Food Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 115. Kudo Pet food Recent Developments/Updates
- Table 116. Kudo Pet food Competitive Strengths & Weaknesses
- Table 117. Naturo Pet Food Basic Information, Manufacturing Base and Competitors
- Table 118. Naturo Pet Food Major Business
- Table 119. Naturo Pet Food Grain-free Dry Dog ??Food Product and Services
- Table 120. Naturo Pet Food Grain-free Dry Dog ??Food Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 121. Naturo Pet Food Recent Developments/Updates
- Table 122. Naturo Pet Food Competitive Strengths & Weaknesses
- Table 123. Vetalogica Basic Information, Manufacturing Base and Competitors
- Table 124. Vetalogica Major Business
- Table 125. Vetalogica Grain-free Dry Dog ??Food Product and Services
- Table 126. Vetalogica Grain-free Dry Dog ??Food Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 127. Vetalogica Recent Developments/Updates
- Table 128. Vetalogica Competitive Strengths & Weaknesses
- Table 129. Forthglade Basic Information, Manufacturing Base and Competitors
- Table 130. Forthglade Major Business
- Table 131. Forthglade Grain-free Dry Dog ??Food Product and Services
- Table 132. Forthglade Grain-free Dry Dog ??Food Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 133. Forthglade Recent Developments/Updates
- Table 134. Forthglade Competitive Strengths & Weaknesses
- Table 135. Nature's Recipe Basic Information, Manufacturing Base and Competitors
- Table 136. Nature's Recipe Major Business
- Table 137. Nature's Recipe Grain-free Dry Dog ??Food Product and Services
- Table 138. Nature's Recipe Grain-free Dry Dog ??Food Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 139. Nature's Recipe Recent Developments/Updates
- Table 140. Nature's Recipe Competitive Strengths & Weaknesses
- Table 141. Petcurean Basic Information, Manufacturing Base and Competitors

Table 142. Petcurean Major Business

Table 143. Petcurean Grain-free Dry Dog ??Food Product and Services

Table 144. Petcurean Grain-free Dry Dog ??Food Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 145. Petcurean Recent Developments/Updates

Table 146. Petcurean Competitive Strengths & Weaknesses

Table 147. Oven-Baked Tradition Basic Information, Manufacturing Base and Competitors

Table 148. Oven-Baked Tradition Major Business

Table 149. Oven-Baked Tradition Grain-free Dry Dog ??Food Product and Services

Table 150. Oven-Baked Tradition Grain-free Dry Dog ??Food Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 151. Oven-Baked Tradition Recent Developments/Updates

Table 152. Oven-Baked Tradition Competitive Strengths & Weaknesses

Table 153. Earthborn Holistic Pet Food Basic Information, Manufacturing Base and Competitors

Table 154. Earthborn Holistic Pet Food Major Business

Table 155. Earthborn Holistic Pet Food Grain-free Dry Dog ??Food Product and Services

Table 156. Earthborn Holistic Pet Food Grain-free Dry Dog ??Food Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 157. Earthborn Holistic Pet Food Recent Developments/Updates

Table 158. Earthborn Holistic Pet Food Competitive Strengths & Weaknesses

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

Table 160. Addiction Pet Foods Major Business

Table 161. Addiction Pet Foods Grain-free Dry Dog ??Food Product and Services

Table 162. Addiction Pet Foods Grain-free Dry Dog ??Food Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 163. Addiction Pet Foods Recent Developments/Updates

Table 164. Addiction Pet Foods Competitive Strengths & Weaknesses

Table 165. Merrick Basic Information, Manufacturing Base and Competitors

Table 166. Merrick Major Business

Table 167. Merrick Grain-free Dry Dog ??Food Product and Services

Table 168. Merrick Grain-free Dry Dog ??Food Production (Kilotons), Price (US\$/Ton),

Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 169. Merrick Recent Developments/Updates

Table 170. Merrick Competitive Strengths & Weaknesses

Table 171. Global Key Players of Grain-free Dry Dog ??Food Upstream (Raw Materials)

Table 172. Global Grain-free Dry Dog ??Food Typical Customers

Table 173. Grain-free Dry Dog ??Food Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. Grain-free Dry Dog ??Food Picture

Figure 2. World Grain-free Dry Dog ??Food Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Grain-free Dry Dog ??Food Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Grain-free Dry Dog ??Food Production (2021-2032) & (Kilotons)

Figure 5. World Grain-free Dry Dog ??Food Average Price (2021-2032) & (US\$/Ton)

Figure 6. World Grain-free Dry Dog ??Food Production Value Market Share by Region (2021-2032)

Figure 7. World Grain-free Dry Dog ??Food Production Market Share by Region (2021-2032)

Figure 8. North America Grain-free Dry Dog ??Food Production (2021-2032) & (Kilotons)

Figure 9. Europe Grain-free Dry Dog ??Food Production (2021-2032) & (Kilotons)

Figure 10. China Grain-free Dry Dog ??Food Production (2021-2032) & (Kilotons)

Figure 11. Japan Grain-free Dry Dog ??Food Production (2021-2032) & (Kilotons)

Figure 12. Southeast Asia Grain-free Dry Dog ??Food Production (2021-2032) & (Kilotons)

Figure 13. Grain-free Dry Dog ??Food Market Drivers

Figure 14. Factors Affecting Demand

Figure 15. World Grain-free Dry Dog ??Food Consumption (2021-2032) & (Kilotons)

Figure 16. World Grain-free Dry Dog ??Food Consumption Market Share by Region (2021-2032)

Figure 17. United States Grain-free Dry Dog ??Food Consumption (2021-2032) & (Kilotons)

Figure 18. China Grain-free Dry Dog ??Food Consumption (2021-2032) & (Kilotons)

Figure 19. Europe Grain-free Dry Dog ??Food Consumption (2021-2032) & (Kilotons)

Figure 20. Japan Grain-free Dry Dog ??Food Consumption (2021-2032) & (Kilotons)

Figure 21. South Korea Grain-free Dry Dog ??Food Consumption (2021-2032) & (Kilotons)

Figure 22. ASEAN Grain-free Dry Dog ??Food Consumption (2021-2032) & (Kilotons)

Figure 23. India Grain-free Dry Dog ??Food Consumption (2021-2032) & (Kilotons)

Figure 24. Producer Shipments of Grain-free Dry Dog ??Food by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 25. Global Four-firm Concentration Ratios (CR4) for Grain-free Dry Dog ??Food

Markets in 2025

Figure 26. Global Four-firm Concentration Ratios (CR8) for Grain-free Dry Dog ??Food Markets in 2025

Figure 27. United States VS China: Grain-free Dry Dog ??Food Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Grain-free Dry Dog ??Food Production Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States VS China: Grain-free Dry Dog ??Food Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 30. United States Based Manufacturers Grain-free Dry Dog ??Food Production Market Share 2025

Figure 31. China Based Manufacturers Grain-free Dry Dog ??Food Production Market Share 2025

Figure 32. Rest of World Based Manufacturers Grain-free Dry Dog ??Food Production Market Share 2025

Figure 33. World Grain-free Dry Dog ??Food Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 34. World Grain-free Dry Dog ??Food Production Value Market Share by Type in 2025

Figure 35. Bean-based

Figure 36. Tuber-based

Figure 37. World Grain-free Dry Dog ??Food Production Market Share by Type (2021-2032)

Figure 38. World Grain-free Dry Dog ??Food Production Value Market Share by Type (2021-2032)

Figure 39. World Grain-free Dry Dog ??Food Average Price by Type (2021-2032) & (US\$/Ton)

Figure 40. World Grain-free Dry Dog ??Food Production Value by Dog Body Type, (USD Million), 2021 & 2025 & 2032

Figure 41. World Grain-free Dry Dog ??Food Production Value Market Share by Dog Body Type in 2025

Figure 42. Grain-Free Food for Small Dogs

Figure 43. Grain-Free Food for Medium Dogs

Figure 44. Grain-Free Food for Large Dogs

Figure 45. World Grain-free Dry Dog ??Food Production Market Share by Dog Body Type (2021-2032)

Figure 46. World Grain-free Dry Dog ??Food Production Value Market Share by Dog Body Type (2021-2032)

Figure 47. World Grain-free Dry Dog ??Food Average Price by Dog Body Type

(2021-2032) & (US\$/Ton)

Figure 48. World Grain-free Dry Dog ??Food Production Value by Age Group, (USD Million), 2021 & 2025 & 2032

Figure 49. World Grain-free Dry Dog ??Food Production Value Market Share by Age Group in 2025

Figure 50. Grain-Free Puppy Food

Figure 51. Grain-Free Adult Dog Food

Figure 52. Grain-Free Senior Dog Food

Figure 53. World Grain-free Dry Dog ??Food Production Market Share by Age Group (2021-2032)

Figure 54. World Grain-free Dry Dog ??Food Production Value Market Share by Age Group (2021-2032)

Figure 55. World Grain-free Dry Dog ??Food Average Price by Age Group (2021-2032) & (US\$/Ton)

Figure 56. World Grain-free Dry Dog ??Food Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 57. World Grain-free Dry Dog ??Food Production Value Market Share by Application in 2025

Figure 58. Online Sales

Figure 59. Offline Sales

Figure 60. World Grain-free Dry Dog ??Food Production Market Share by Application (2021-2032)

Figure 61. World Grain-free Dry Dog ??Food Production Value Market Share by Application (2021-2032)

Figure 62. World Grain-free Dry Dog ??Food Average Price by Application (2021-2032) & (US\$/Ton)

Figure 63. Grain-free Dry Dog ??Food Industry Chain

Figure 64. Grain-free Dry Dog ??Food Procurement Model

Figure 65. Grain-free Dry Dog ??Food Sales Model

Figure 66. Grain-free Dry Dog ??Food Sales Channels, Direct Sales, and Distribution

Figure 67. Methodology

Figure 68. Research Process and Data Source

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