

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

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## Abstracts

The global Raw Dog Food market size is expected to reach \$ 22839 million by 2032, rising at a market growth of 7.9% 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 Raw Dog Food production, demand, key manufacturers, and key regions.

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

#### Highlights and key features of the study

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

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

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

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

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

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

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

Global Raw Dog Food production by Sales Channel, production, value, CAGR, 2021-2032, (USD Million) & (Kiloton)

This report profiles key players in the global Raw 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 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 Raw Dog Food market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Kiloton) and average price (US\$/Ton) by manufacturer, by Type, and by Sales Channel. 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 Raw Dog Food Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

### Global Raw Dog Food Market, Segmentation by Type:

Chicken

Lamb

Beef

Duck

Fish

Others

### Global Raw Dog Food Market, Segmentation by Grain Formulation:

Grain-inclusive

Grain-free

### Global Raw Dog Food Market, Segmentation by Life Stage:

Kitten

Adult

### Global Raw Dog Food Market, Segmentation by Sales Channel:

Online Sales

Offline Sales

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

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