

Global Grain-Free Dog Food Market Growth 2026-2032

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Abstracts

The global Grain-Free Dog Food market size is predicted to grow from US\$ 50947 million in 2025 to US\$ 75471 million in 2032; it is expected to grow at a CAGR of 6.7% from 2026 to 2032.

In 2025, global sales volume of grain-free dog food is estimated at approximately 11.2 million tons, with an average selling price of around USD 4,650 per ton. Grain-free dog food refers to canine pet food formulations that exclude grains such as wheat, corn, barley, oats, and rye, and instead rely primarily on animal proteins (such as chicken, beef, fish, and lamb) as the core nutritional source, combined with carbohydrate substitutes such as potatoes, peas, or other legumes. It is mainly designed for dogs with grain sensitivities, digestive issues, skin allergies, or preferences for high-protein diets. The product exists in multiple forms, including dry kibble (extruded food), wet food, and freeze-dried food, with dry kibble remaining the dominant segment. Compared with traditional grain-inclusive dog food, grain-free formulations typically feature higher animal protein content, reduced grain dependency, and stronger functional positioning in digestive and skin health management. However, many formulations rely on legumes or starch-based substitutes for structural balance, leading to significant variation in nutritional design across brands. Current product structures include single-animal-protein grain-free diets, limited-ingredient grain-free formulations, and functional grain-free variants targeting gastrointestinal health, skin care, and weight management. The industry is evolving toward higher meat inclusion, hypoallergenic positioning, natural ingredients, and functional nutrition enhancement.

Grain-free dog food represents one of the largest and most widely adopted functional upgrade categories in the global pet food market. Demand is driven primarily by premiumization trends, increasing prevalence of food allergies and gastrointestinal issues, and growing consumer preference for high-meat diets. North America and Europe are the core markets, with North America holding the largest share due to high

levels of pet humanization and strong penetration of premium dog food, while Japan and China are experiencing rapid growth in premium segments but remain in a structural upgrade phase. The category covers all dog sizes, but penetration is higher among small-breed and indoor dogs. The competitive landscape is dominated by major global pet food corporations and premium brands such as Mars Petcare, Nestlé, Purina, Hill's, Blue Buffalo, and Champion Petfoods, which have strong advantages in formulation R&D, animal nutrition databases, and global supply chain systems. Since 'grain-free' does not necessarily mean low-carbohydrate, nutritional composition often relies heavily on legume and starch substitution systems, leading to ongoing structural debate between perceived health benefits and actual formulation design. Future trends include continued increase in meat content, higher adoption of single-protein and limited-ingredient diets, stronger gastrointestinal and skin health positioning, and a shift from 'grain-free as a marketing claim' toward 'true nutritional structure-driven formulation'.

LP Information, Inc. (LPI)'s newest research report, the 'Grain-Free Dog Food Industry Forecast' looks at past sales and reviews total world Grain-Free Dog Food sales in 2025, providing a comprehensive analysis by region and market sector of projected Grain-Free Dog Food sales for 2026 through 2032. With Grain-Free Dog Food sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Grain-Free Dog Food industry.

This Insight Report provides a comprehensive analysis of the global Grain-Free Dog Food landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Grain-Free Dog Food portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Grain-Free Dog Food market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Grain-Free Dog Food and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Grain-Free Dog Food.

This report presents a comprehensive overview, market shares, and growth opportunities of Grain-Free Dog Food market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Dry Food

Wet Food

Segmentation by Formulation:

Organic

Inorganic

Segmentation by Life Stage:

Kitten

Adult

Segmentation by Application:

Online Sales

Offline Sales

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

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 Addressed in this Report

What is the 10-year outlook for the global Grain-Free Dog Food market?

What factors are driving Grain-Free Dog Food market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Grain-Free Dog Food market opportunities vary by end market size?

How does Grain-Free Dog Food break out by Type, by Application?

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