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Raw & Organic Pet Food Market Forecasts to 2034 – Global Analysis By Product (Dry Food, Wet Food, Freeze-Dried Food, Dehydrated Food, Raw Frozen Food, Treats & Snacks, Other Products), By Ingredient Type, By Pet Type, By Distribution Channel, By Processing Method, By Application, By End User and By Geography

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Abstracts

According to Stratistics MRC, the Global Raw & Organic Pet Food Market is accounted for $2.7 billion in 2026 and is expected to reach $4.9 billion by 2034 growing at a CAGR of 7.5% during the forecast period. Raw & Organic Pet Food refers to pet diets made from minimally processed, natural ingredients without synthetic additives, preservatives, or artificial colors. Raw pet food includes uncooked meat, organs, and bones, while organic pet food uses certified organic ingredients. These products aim to provide higher nutritional value, improve digestion, and promote overall pet health. They appeal to environmentally conscious pet owners, support sustainable farming practices, and align with the growing trend of premium, holistic, and health-focused pet nutrition.

Market Dynamics:

Driver:

Rising pet owner health consciousness

Consumers are increasingly treating pets as family members, leading to higher demand for healthier food options. Rising concerns about obesity, allergies, and digestive issues in pets are pushing owners toward natural diets. The trend of humanization of pets is

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further accelerating the adoption of organic and raw food products. Social media and veterinary recommendations are amplifying awareness about the benefits of clean-label pet food. As a result, health-conscious owners are fueling consistent market growth.

Restraint:

High product pricing limits adoption

Affluent consumers are increasingly willing to spend more on specialized diets for their pets. Companies are innovating with tailored formulations targeting specific health needs such as joint care, skin health, and immunity. The rise of e-commerce platforms is enabling wider distribution of premium pet food brands. Collaborations with veterinarians and pet clinics are boosting credibility and adoption. Expansion into premium niches is expected to significantly enhance revenue streams.

Opportunity:

Expansion into premium pet segments

Many consumers remain loyal to established dry and wet food products. Aggressive marketing campaigns by large pet food companies pose a challenge to organic entrants. Shelf space in retail stores is often skewed toward conventional products, limiting visibility for raw and organic options. Additionally, concerns about storage and shelf life of raw food discourage some buyers. This competitive landscape remains a persistent threat to market expansion.

Threat:

Competition from conventional pet foods

Conventional pet food brands continue to dominate the market due to affordability and convenience. Many consumers remain loyal to established dry and wet food products. Aggressive marketing campaigns by large pet food companies pose a challenge to organic entrants. Shelf space in retail stores is often skewed toward conventional products, limiting visibility for raw and organic options. Additionally, concerns about storage and shelf life of raw food discourage some buyers. This competitive landscape remains a persistent threat to market expansion.

Covid-19 Impact:

The Covid-19 pandemic had a mixed impact on the raw and organic pet food market. On one hand, supply chain disruptions affected ingredient sourcing and distribution. On the other hand, increased pet adoption during lockdowns boosted demand for premium food products. Consumers spending more time at home became more attentive to their pets' diets. Online sales channels witnessed significant growth as physical stores faced restrictions. Overall, the pandemic accelerated digital adoption while highlighting supply chain vulnerabilities.

The dry food segment is expected to be the largest during the forecast period

The dry food segment is expected to account for the largest market share during the forecast period as it offers convenience, longer shelf life, and affordability compared to raw alternatives. Pet owners prefer dry food for ease of storage and feeding, making it a dominant choice globally. Meanwhile, the digestive health segment is predicted to witness the highest CAGR due to rising concerns about gastrointestinal issues in pets. Specialized formulations targeting gut health are gaining traction among veterinarians and pet owners alike. Increasing awareness of probiotics and natural digestive aids is driving this growth.

The digestive health segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the digestive health segment is predicted to witness the highest growth rate due to the rising awareness among pet owners about gastrointestinal issues in pets is driving demand for specialized formulations. Products enriched with probiotics, prebiotics, and natural fibers are gaining traction as they support gut health and immunity. Veterinary recommendations are further boosting adoption of digestive health-focused diets. Overall, digestive health is emerging as a critical growth driver in premium pet nutrition.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share owing to high pet ownership rates, strong purchasing power, and established premium pet food brands. The region's consumers are highly receptive to organic and natural products, supporting market expansion. Meanwhile, Asia Pacific is anticipated to exhibit the highest CAGR due to rising disposable incomes and growing awareness of pet health. Rapid urbanization and increasing pet adoption in countries like China and India are fueling demand. Local manufacturers are entering the market with affordable organic options, further boosting growth.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR driven by rising disposable incomes, urbanization, and increasing pet adoption in countries such as China, India, and Japan. Consumers in the region are becoming more health-conscious, leading to greater demand for minimally processed, natural diets. Local manufacturers are entering the market with affordable organic options, expanding accessibility. This strong trajectory positions Asia Pacific as the fastest-growing regional market globally.

Key players in the market

Some of the key players in Raw & Organic Pet Food Market include Nestl? Purina PetCare, Mars Petcare, The J.M. Smucker Company, Colgate-Palmolive Company, Diamond Pet Foods, Wellness Pet Company, Blue Buffalo Company, Open Farm Pet Food, Primal Pet Foods, Stella & Chewy's, Nature's Logic, Castor & Pollux, Instinct Pet Food, Canidae Pet Food and Fromm Family Foods.

Key Developments:

In August 2024, Mars Petcare partnered with Big Idea Ventures, AAK (plant-based oils), and B?hler (food technology) to launch the Next Generation Pet Food Program. This pilot initiative aimed to support startups innovating in sustainable and organic pet food solutions, with selected startups presenting at the Singapore

In April 2024, Nestl? Purina announced new product innovations, focusing on premium and organic pet food segments. Despite a 1.7% decline in sales in Q1 2024, Purina remained the top contributor to Nestl?'s organic growth, with plans to rebound strongly in the second quarter through innovation in natural and raw formulations.

Products Covered:

- Dry Food
- Wet Food

Freeze-Dried Food

Dehydrated Food

Raw Frozen Food

Treats & Snacks

Other Products

Ingredient Types Covered:

Organic Meat & Poultry

Organic Fruits & Vegetables

Organic Grains

Superfoods

Functional Additives

Probiotics & Supplements

Other Ingredient Types

Pet Types Covered:

Dogs

Cats

Birds

Small Mammals

Aquatic Pets

Reptiles

Other Pet Types

Distribution Channels Covered:

Pet Specialty Stores

Veterinary Clinics

Supermarkets & Hypermarkets

Online Retail

Direct-to-Consumer

Subscription Services

Other Distribution Channels

Processing Methods Covered:

Cold-Pressed

Air-Dried

Freeze-Dried

Minimally Processed

Raw Prepared

High Pressure Processing

Other Processing Methods

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Applications Covered:

- Daily Nutrition
- Weight Management
- Digestive Health
- Skin & Coat Care
- Immune Support
- Allergy Management
- Other Applications

End Users Covered:

- Individual Pet Owners
- Breeders
- Pet Shelters
- Veterinary Hospitals
- Pet Boarding Facilities
- Pet Grooming Centers
- Other End Users

Regions Covered:

- North America

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- United States
- Canada
- Mexico

Europe

- United Kingdom
- Germany
- France
- Italy
- Spain
- Netherlands
- Belgium
- Sweden
- Switzerland
- Poland
- Rest of Europe

Asia Pacific

- China
- Japan
- India

South Korea

Australia

Indonesia

Thailand

Malaysia

Singapore

Vietnam

Rest of Asia Pacific

South America

Brazil

Argentina

Colombia

Chile

Peru

Rest of South America

Rest of the World (RoW)

Middle East

Saudi Arabia

United Arab Emirates

Qatar

Israel

Rest of Middle East

Africa

South Africa

Egypt

Morocco

Rest of Africa

What our report offers:
- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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Note: Tables for North America, Europe, APAC, South America, and Rest of the World (RoW) are also represented in the same manner as above.

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