

Veterinary Diet & Therapeutic Nutrition Market Forecasts to 2034 – Global Analysis By Product (Prescription Diet, Non-Prescription Diet, Functional Nutrition, Specialty Therapeutic Diets), Animal Type, Ingredient Type, Distribution Channel, Application and By Geography

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Abstracts

According to Statistics MRC, the Global Veterinary Diet & Therapeutic Nutrition Market is accounted for \$5.19 billion in 2026 and is expected to reach \$9.33 billion by 2034 growing at a CAGR of 7.6% during the forecast period. Veterinary Diet & Therapeutic Nutrition refers to specialized, scientifically formulated animal nutrition designed to support the prevention, management, and treatment of specific medical conditions in companion and livestock animals. These diets are developed based on veterinary and nutritional science to address disorders such as obesity, renal disease, gastrointestinal issues, diabetes, allergies, and joint conditions. Typically recommended or prescribed by veterinarians, therapeutic nutrition complements clinical treatment by improving health outcomes, enhancing quality of life, and supporting long-term disease management through targeted nutrient composition, controlled ingredients, and functional additives.

Market Dynamics:

Driver:

Rising Prevalence of Chronic Pet Health Conditions

The increasing incidence of chronic health conditions among companion animals is a

major driver of the Veterinary Diet & Therapeutic Nutrition Market. Disorders such as obesity, diabetes, renal dysfunction, gastrointestinal sensitivities, allergies, and joint-related issues are becoming more prevalent due to aging pet populations and sedentary lifestyles. As veterinary care shifts toward preventive and long-term disease management, therapeutic diets are increasingly recommended as an integral component of treatment. This sustained clinical reliance on nutrition-based interventions continues to propel market growth globally.

Restraint:

High purification and infrastructure costs

High purification standards and infrastructure requirements significantly restrain market expansion. Veterinary therapeutic diets demand stringent quality control, specialized processing facilities, and advanced formulation technologies to ensure safety, efficacy, and regulatory compliance. These factors elevate production and operational costs, which are ultimately reflected in higher product prices. As a result, affordability becomes a challenge in price-sensitive markets, limiting widespread adoption. Smaller manufacturers also face barriers to entry, restricting competition and slowing innovation across the market landscape.

Opportunity:

Pet Humanization & Premiumization Trend

The accelerating trend of pet humanization presents a strong growth opportunity for the Veterinary Diet & Therapeutic Nutrition Market. Pet owners increasingly regard animals as family members and prioritize their health and longevity, driving demand for premium, condition-specific nutrition solutions. This shift encourages higher spending on veterinarian-recommended diets backed by clinical evidence. Additionally, growing awareness of preventive healthcare and wellness-focused feeding practices supports the adoption of specialized therapeutic formulations, particularly in urban and developed markets.

Threat:

Stringent Regulatory Requirements

Stringent regulatory frameworks pose a notable threat to market growth. Veterinary

therapeutic diets must comply with rigorous safety, labeling, and efficacy standards imposed by regulatory authorities across regions. Navigating these complex regulations increases development timelines, approval costs, and compliance burdens for manufacturers. Variations in regulatory requirements between countries further complicate global expansion strategies. Failure to meet evolving standards can result in product recalls or market withdrawal, creating operational risks and limiting the pace of innovation.

Covid-19 Impact:

The COVID-19 pandemic had a mixed impact on the Veterinary Diet & Therapeutic Nutrition Market. While supply chain disruptions and logistical challenges temporarily affected production and distribution, increased pet adoption during lockdowns supported long-term demand growth. Heightened focus on pet health and preventive care encouraged greater reliance on therapeutic nutrition. Additionally, the expansion of e-commerce and tele-veterinary consultations improved accessibility to specialized diets, partially offsetting the short-term operational challenges faced during the pandemic period.

The small mammals segment is expected to be the largest during the forecast period

The small mammals segment is expected to account for the largest market share during the forecast period, due to high global population of companion animals such as dogs and cats. These animals are more prone to chronic and age-related conditions that require long-term dietary management. Increased veterinary visits, higher healthcare spending, and greater awareness of therapeutic nutrition among pet owners further support this segment dominance. Continuous product innovation targeting breed-specific and condition-specific needs strengthens this segment's market position.

The pet specialty stores segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the pet specialty stores segment is predicted to witness the highest growth rate, due to their expanding product portfolios and focus on premium and therapeutic offerings. These stores provide specialized guidance, curated selections, and stronger engagement with informed pet owners seeking veterinarian-recommended nutrition. Growing urbanization, rising disposable income and increased preference for personalized purchasing experiences further fuels the growth. Additionally, integration with online platforms enhances accessibility and convenience,

accelerating segment expansion globally.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share, due to high pet ownership rates, advanced veterinary healthcare infrastructure, and strong awareness of therapeutic nutrition. The region benefits from early adoption of premium pet food products and widespread availability through veterinary clinics and specialty retailers. Favorable reimbursement structures, established key players, and continuous product innovation further strengthen market penetration, positioning North America as a dominant contributor to global revenue.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR, owing to rising pet adoption, rapid urbanization, and increasing disposable income. Growing awareness of pet health and expanding access to veterinary services are driving demand for therapeutic nutrition. Additionally, the influence of Western pet care practices and the emergence of organized retail and e-commerce platforms support market acceleration. Untapped potential in emerging economies further positions Asia Pacific as a high-growth region.

Key players in the market

Some of the key players in Veterinary Diet & Therapeutic Nutrition Market include Purina PetCare (Nestlé S.A.), Mars Petcare, Hill's Pet Nutrition (Colgate-Palmolive), Blue Buffalo (General Mills), Royal Canin, Diamond Pet Foods, Veterinary Nutrition Group, Wellness Pet, LLC, NutriSource, Wysong, Natural Balance Pet Foods, Farmina Pet Foods, JustFoodForDogs, EmerAid, LLC, and Virbac.

Key Developments:

In October 2025, Mars Petcare and Big Idea Ventures have hand-picked three innovative startups for their 2025 Next Generation Pet Food Program, spotlighting sustainable biotech ingredients and circular feed solutions to transform pet nutrition and reduce environmental impact.

In March 2025, Mars, Incorporated has extended its partnership with the Washington Spirit, becoming the team's Official Petcare Partner, with its logo featured on jerseys

and signage, community ticket donations, pet-friendly game nights, and collaborative fan and pet experiences.

Products Covered:

Prescription Diet

Non-Prescription Diet

Functional Nutrition

Specialty Therapeutic Diets

Animal Types Covered:

Dogs

Cats

Small Mammals

Birds

Other Animal Types

Ingredient Types Covered:

Protein Sources

Carbohydrates

Fats & Oils

Vitamins & Minerals

Functional Additives

Distribution Channels Covered:

Veterinary Clinics & Hospitals

Online Retail

Pharmacies

Pet Specialty Stores

Supermarkets/Hypermarkets

Other Distribution Channels

Applications Covered:

Gastrointestinal Disorders

Renal/Urinary Disorders

Obesity/Weight Management

Allergies & Skin Disorders

Joint & Mobility Support

Cardiovascular Disorders

Endocrine/Metabolic Disorders

Regions Covered:

North America

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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