

India Pet Food Market, By Pet Type (Dog, Cat, Fish, Other), By Food Type (Dry, Wet, Others (Treats, Flake & Pellet, Freeze-Dried, etc.)), By Ingredients (Plant-based, Animal-based), By Sales Channel (Pet Specialty Store, Supermarket/Hypermarket, Online, Others), By Region, Competition, Forecast & Opportunities, 2020-2030F

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Abstracts

India Pet Food Market was valued at USD 843.89 million in 2024 and is anticipated to grow with a CAGR of 15.37% through 2030. The India pet food market has experienced substantial growth over the past decade, fueled by increasing pet ownership, urbanization, and rising disposable incomes. As more families adopt pets, particularly in urban areas, the demand for high-quality pet food products has surged. Pet owners are increasingly aware of the nutritional needs of their animals and are willing to invest in premium and specialized pet food products.

According to the State of Pet Homelessness report updated on May 2024, approximately 69.3 million stray cats and dogs are found across India. The research indicates there are 8 million stray cats and 52.5 million stray dogs. While these figures are significant, they represent a decrease of over 10 million homeless animals compared to 2021. This decline in stray animal populations may reflect efforts in various regions to address pet homelessness through initiatives such as spaying and neutering programs, adoption drives, and increased awareness about responsible pet ownership.

Government and non-governmental organizations (NGOs) have been instrumental in implementing these measures, aiming to reduce the stray animal population, mitigate public health risks, and improve animal welfare standards across the country.

The market is also seeing a trend towards natural and organic pet food, driven by increasing health consciousness among pet owners. This shift is creating opportunities for new entrants and niche brands focusing on holistic and organic pet food solutions.

Key Market Drivers

Increasing Pet Ownership

The surge in pet ownership in India stands as a pivotal driver for the pet food market. Increasingly, pets are being embraced as integral family members, particularly in urban areas, driven by evolving lifestyles, higher disposable incomes, and a growing recognition of the emotional benefits and companionship pets offer.

This trend has led to a significant rise in demand for pet food products. While dogs and cats remain the most popular pets, there is also a notable increase in ownership of birds, fish, and small mammals, expanding the diversity of available pet food offerings. According to Dogster, 63% of pet owners in India have dogs, 42% have cats, and 11% own at least four pets, underscoring the market's robust growth potential.

Urbanization and Lifestyle Changes

Urbanization is transforming India's demographic landscape, with more people moving to cities in search of better opportunities. This urban migration is accompanied by lifestyle changes, including the adoption of pets as companions in smaller, often more isolated living environments. Urban dwellers, who may not have the space or time for extensive pet care routines, increasingly prefer the convenience of commercially prepared pet food over traditional homemade diets. This shift is particularly evident among the younger population and working professionals who view pets as family members and are willing to spend more on their wellbeing, including high-quality and specialized pet food.

Rising Disposable Incomes

India's economic growth has led to a significant increase in disposable incomes, especially among the middle and upper-middle classes. This economic prosperity allows pet owners to spend more on premium products, including pet food. Higher incomes also correlate with greater awareness of pet health and nutrition, prompting owners to opt for high-quality, nutritionally balanced pet food products. The willingness

to invest in premium, organic, and specialized diets for pets is growing, mirroring trends seen in more developed markets. This trend is further bolstered by the proliferation of information through digital media, making pet owners more informed about the benefits of proper pet nutrition.

Awareness of Pet Health and Nutrition

Increased awareness about pet health and nutrition is driving the demand for high-quality pet food in India. Pet owners are becoming more knowledgeable about the specific dietary needs of their animals, seeking products that cater to different life stages, health conditions, and breed-specific requirements. Veterinarians and pet care experts play a crucial role in educating pet owners about the importance of balanced diets, leading to a shift away from home-cooked meals to commercially prepared pet foods that ensure consistent nutritional value. Brands are responding to this demand by offering a variety of products, including age-specific formulas, grain-free options, and therapeutic diets for pets with medical conditions.

Key Market Challenges

Regulatory and Quality Control Issues

One of the foremost challenges in the Indian pet food market is the lack of stringent regulatory frameworks and quality control standards. Unlike in many Western countries, where pet food regulations are well-established and rigorously enforced, India lacks comprehensive guidelines governing the production, labeling, and distribution of pet food. This regulatory gap can lead to inconsistencies in product quality, with some manufacturers potentially using substandard or harmful ingredients.

The absence of clear regulations also makes it difficult for consumers to make informed choices. Labels may not always provide complete or accurate information about the nutritional content or safety of pet food products. This situation is exacerbated by the presence of counterfeit or low-quality products in the market, which can jeopardize pet health and erode consumer trust.

Limited Awareness and Education

Another significant challenge is the limited awareness and education among pet owners regarding proper pet nutrition. Many Indian pet owners still rely on home-cooked meals or table scraps for their pets, often due to cultural practices or misconceptions about the

benefits of commercially prepared pet food. While there is a growing segment of the population that is knowledgeable about pet dietary needs, a large portion remains unaware of the specific nutritional requirements of different pets.

This lack of awareness can lead to nutritional deficiencies and health issues in pets, such as obesity, malnutrition, and various diet-related diseases. Additionally, pet owners may not recognize the advantages of specialized diets tailored to specific life stages, breeds, or health conditions. Bridging this knowledge gap is crucial for the sustained growth of the pet food market in India.

Distribution and Accessibility

Ensuring widespread distribution and accessibility of pet food products is another major challenge. India is a vast and diverse country with varying levels of infrastructure development across its regions. While urban areas have relatively better access to a variety of pet food products through supermarkets, pet specialty stores, and online platforms, rural and semi-urban areas often lack such facilities.

This disparity in distribution means that many pet owners in less developed regions have limited options for purchasing quality pet food. Moreover, logistical challenges such as transportation costs, supply chain inefficiencies, and storage issues can further complicate the availability of pet food products in remote areas. Addressing these logistical barriers is essential to ensure that pet food products are accessible to a broader demographic.

Pricing and Affordability

Pricing and affordability remain significant concerns in the Indian pet food market. High-quality and specialized pet food products often come with a premium price tag, which can be a deterrent for many pet owners. While the middle and upper-middle classes are increasingly willing to spend more on pet care, a substantial portion of the population still finds premium pet food products out of reach financially.

The challenge of affordability is compounded by the economic disparities across different regions and income groups in India. For many pet owners, especially in lower-income segments, the cost of commercially prepared pet food can be prohibitive, leading them to opt for cheaper, lower-quality alternatives or home-cooked meals. This issue underscores the need for a range of products at different price points to cater to diverse consumer segments while ensuring nutritional adequacy.

Key Market Trends

Rise in Demand for Natural and Organic Products

There is a growing preference among Indian pet owners for natural and organic pet food products. This trend mirrors broader global consumer behavior towards healthier and more sustainable options. Natural pet foods are perceived as offering better nutritional value, free from artificial additives, colors, and preservatives that can potentially harm pets. Organic options, made from ingredients grown without synthetic pesticides or fertilizers, are also gaining popularity among health-conscious consumers.

Brands are responding to this demand by introducing product lines that emphasize natural ingredients, such as whole grains, vegetables, and high-quality proteins sourced from organic farms. These products often highlight their environmental sustainability credentials, appealing to pet owners concerned about their pets' well-being and the planet.

Premiumization and Humanization of Pet Food

There is a noticeable trend towards premiumization and humanization of pet food products in India. As pet ownership becomes more integrated into urban lifestyles, pet owners are increasingly willing to invest in higher-quality and specialized diets for their animals. Premium pet foods often feature gourmet ingredients, novel proteins, and customized formulations tailored to specific health needs or dietary preferences.

Humanization of pet food refers to the concept of treating pets as family members and providing them with diets that mirror human food trends. This includes pet foods that mimic popular human dietary trends such as grain-free, gluten-free, or paleo diets. Manufacturers are also focusing on enhancing the palatability and sensory appeal of pet foods, with flavors and textures that appeal to both pets and their owners.

Expansion of Functional and Therapeutic Foods

Functional and therapeutic pet foods are gaining traction in the Indian market, driven by increasing awareness of pet health issues and the desire to address specific nutritional needs. Functional foods are designed to provide additional health benefits beyond basic nutrition, such as improved digestion, joint health, or skin and coat support. These products often contain added supplements like probiotics, omega fatty acids,

glucosamine, and antioxidants.

Therapeutic diets cater to pets with specific medical conditions such as allergies, obesity, diabetes, or kidney disease. These diets are formulated under veterinary supervision to help manage or alleviate symptoms and improve overall health outcomes. The availability of such specialized diets is expanding as veterinarians play a more prominent role in recommending nutritionally balanced options for pets with health concerns.

E-commerce and Digital Influence

The role of e-commerce in shaping the pet food market in India cannot be overstated. Online platforms have democratized access to a wide range of pet food products, offering convenience, competitive pricing, and a vast selection that may not be available in local brick-and-mortar stores. This trend has been accelerated by the COVID-19 pandemic, which prompted a shift towards online shopping for pet essentials.

E-commerce platforms allow pet owners to research product reviews, compare prices, and make informed purchasing decisions from the comfort of their homes.

Manufacturers and retailers are leveraging digital marketing strategies, including social media campaigns and influencer partnerships, to engage directly with consumers and build brand loyalty. The convenience of subscription services for auto-delivery of pet food further enhances customer retention and ensures regular supply.

Segmental Insights

Pet Type Insights

In the Indian pet food market, the dog food segment is experiencing rapid growth, driven by several factors contributing to its prominence. Dogs are the most popular pets in India, particularly in urban areas where pet ownership is on the rise due to changing lifestyles and increasing disposable incomes. As more families choose to adopt dogs, the demand for specialized and nutritionally balanced dog food products has surged.

Manufacturers are responding to this growing demand by introducing a wide range of dog food options tailored to different breeds, sizes, and life stages. This includes dry kibble, wet food, treats, and supplements that cater to specific dietary needs and preferences. Premiumization within the dog food segment is also notable, with consumers increasingly opting for higher-quality products that offer health benefits such

as improved digestion, joint support, and coat health.

The influence of veterinary recommendations and increased awareness among dog owners about the importance of proper nutrition further drives growth in this segment. Online platforms and pet specialty stores play a crucial role in expanding access to a diverse array of dog food brands and formulations, enhancing convenience and choice for pet owners across the country. As the dog food segment continues to evolve, innovations in product development and marketing strategies are expected to sustain its rapid growth trajectory in the Indian market.

Regional Insights

In the India pet food market, the North region stands out as a dominant force due to several key factors. Geographically, this region encompasses major metropolitan areas such as Delhi-NCR (National Capital Region), Chandigarh, and Jaipur, which have high urbanization rates and a large population base with significant disposable incomes. These urban centers are hubs of economic activity and cultural diversity, contributing to a higher concentration of pet ownership compared to other regions.

Moreover, the North region benefits from a well-developed infrastructure that supports the distribution and retailing of pet food products. It hosts a dense network of supermarkets, pet specialty stores, and veterinary clinics that cater to the needs of pet owners. This accessibility to a variety of pet food brands and products enhances consumer choice and promotes market growth.

Culturally, North India also has a long-standing tradition of pet ownership, with pets being considered integral members of many households. This cultural affinity towards pets drives demand for high-quality and specialized pet food products that meet the nutritional requirements and preferences of different pet species and breeds.

Overall, the North region's combination of economic prosperity, urbanization, robust infrastructure, and cultural factors positions it as a dominant player in shaping the trajectory of the pet food market across India.

Key Market Players

Mars International India Private Limited

Nestlé India Limited

Himalaya Drug Company Private Limited

Drools Pet Food Private Ltd

Venky's (India) Limited

Goa Medicos Private Limited (Farmina)

AOV Agro Foods Pvt. Ltd

Bharat International Pet Foods Private Limited

Orange Pet Nutrition Private Limited

Hausberg Private Limited (Canine India)

Report Scope:

In this report, the India Pet Food Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

India Pet Food Market, By Pet Type:

Dog

Cat

Fish

Other

India Pet Food Market, By Food Type:

Dry

Wet

Others

India Pet Food Market, By Ingredients:

Plant-based

Animal-based

India Pet Food Market, By Sales Channel:

Pet Specialty Store

Supermarket/Hypermarket

Online

Others

India Pet Food Market, By Region:

North

South

East

West

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the India Pet Food Market.

Available Customizations:

India Pet Food Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

India Pet Food Market, By Pet Type (Dog, Cat, Fish, Other), By Food Type (Dry, Wet, Others (Treats, Flake & Pe...

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Detailed analysis and profiling of additional market players (up to five).

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