

Pet Therapeutic Diet Market Size, Share and Growth Outlook 2026: By Product Type (Dry Food, Wet Food), By Animal Type, By Indication, By Distribution Channel, Companies to 2034.

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Abstracts

The global Pet Therapeutic Diet Market size is forecast to increase from \$5.62 Billion in 2026 to \$10.07 Billion in 2034 at a CAGR of 7.56% between 2026 and 2034.

The Pet Therapeutic Diet market report provides detailed analysis and outlook of Pet Therapeutic Diet segments including By Product Type (Dry Food, Wet Food), By Animal Type (Dogs, Cats), By Indication (Obesity Care, Renal Care, Gastrointestinal Care, Diabetic Care, Joint and Mobility Care, Dental/Oral Care, Oncology Care, Recovery Care), By Distribution Channel (Veterinary Hospitals and Clinics, E-commerce, Retail Pharmacies and Pet Specialty Stores) across global and regional markets. Further, analysis and outlook across 21 countries in North America, Europe, Asia Pacific, Middle East, Africa, and South America are provided in the study.

Pet Therapeutic Diet Industry Overview

Precision Nutrition and Microbiome Science Are Transforming the Pet Therapeutic Diet Industry

The pet therapeutic diet industry is shifting from conventional nutrition toward clinically targeted dietary solutions designed to manage chronic health conditions, improve digestive function, and support long-term wellness. Veterinary nutrition is increasingly being guided by scientific evidence surrounding the gut microbiome, metabolic health, and life-stage-specific nutritional requirements. Manufacturers are expanding therapeutic portfolios with functional ingredients, probiotics, and personalized nutritional

formulations that complement veterinary care while addressing gastrointestinal disorders, obesity, aging-related health decline, and behavioral conditions. The growing integration of nutritional science with digital veterinary support is further strengthening the role of therapeutic diets in preventive and clinical pet healthcare.

Functional Ingredients and Clinical Nutrition Drive Product Innovation

Product innovation is increasingly centered on high-quality ingredients and evidence-based nutritional interventions that improve measurable health outcomes. Royal Canin U.S., a division of Mars, Incorporated, expanded its therapeutic nutrition portfolio with Royal Canin Fresh Health Nutrition, its first commercial range of gently cooked, high-moisture diets developed by veterinary nutritionists. The formulations move beyond traditional dry kibble by incorporating fresh proteins including pork, beef, and chicken alongside functional high-fiber ingredients such as summer squash and kale to promote gastrointestinal health and support healthy weight management across adult and senior life stages. Similarly, Nestlé Purina PetCare introduced Pro Plan AdvantEDGE, a probiotic-powered therapeutic nutrition line for adult and senior dogs and cats. Built upon the company's microbiome research, the diets utilize a proprietary triple-action digestive approach to improve gut health, optimize nutrient absorption, and strengthen natural immune defenses in aging companion animals.

Microbiome Research and Digital Veterinary Collaboration Expand Therapeutic Care

The industry is increasingly recognizing the connection between nutrition, gastrointestinal health, and behavioral wellness. Supporting this trend, the Purina Institute has expanded its global collaborative initiatives focused on advanced veterinary therapeutic diets, emphasizing microbiome-based interventions and the gut-brain axis. The initiative builds upon its strategic partnership with digital veterinary platforms, enabling board-certified veterinary behavioral support alongside specialized therapeutic metabolic and gastrointestinal diets, including the PPVD HA and EL Elemental product ranges. This combination of clinical nutrition, microbiome science, and digital veterinary collaboration reflects the industry's movement toward integrated therapeutic care models that deliver personalized nutritional management for a broad range of companion animal health conditions.

Pet Therapeutic Diet Market Trends, Growth Drivers, Competitive Landscape, and Future Opportunities

The global Pet Therapeutic Diet market is witnessing increasing investments in

innovation, product development, digital transformation, artificial intelligence integration, healthcare infrastructure expansion, and strategic partnerships across developed and emerging economies. Key Companies in the industry include- Colgate-Palmolive Company (Hill's Pet Nutrition Inc.), Nestle S.A. (Nestle Purina PetCare), Mars, Incorporated (Royal Canin / Mars Petcare), General Mills, Inc. (Blue Buffalo Company, Ltd.), Diamond Pet Foods, Inc., Virbac, Dechra Pharmaceuticals PLC, Farmina Pet Foods, JustFoodForDogs, The J.M. Smucker Company. The Pet Therapeutic Diet market is expected to remain one of the most closely watched segments in the global healthcare industry, with companies focusing on niche market segments. As healthcare systems across the US, Europe, Asia-Pacific, Latin America, and Middle East & Africa continue to prioritize efficiency, access, and innovation, the Pet Therapeutic Diet industry outlook remains shaped by rising healthcare expenditure, demographic change, digital transformation, and product innovation.

The report provides detailed market analysis including-

Growth Pet Therapeutic Diet Market size outlook across 3 scenarios- High growth, reference, and Low growth cases

Market Trends, Drivers, Potential Opportunities, and Challenges faced by Pet Therapeutic Diet companies

Porter's Five forces analysis- Bargaining power of buyers and sellers, Threat of Substitutes and new entrants, and Intensity of competitive rivalry

Detailed SWOT Analysis of global and regional Pet Therapeutic Diet markets

Competitive analysis including business description, product analysis, and financial profiles

Key country specific analysis detailing key factors shaping the short-term and long-term outlook

Recent industry developments and news including mergers, acquisitions, product launches, expansions, and company announcements

Pet Therapeutic Diet Market Competitive Benchmarking and Company Analysis

Leading companies in Pet Therapeutic Diet industry include- Colgate-Palmolive Company (Hill's Pet Nutrition Inc.), Nestle S.A. (Nestle Purina PetCare), Mars, Incorporated (Royal Canin / Mars Petcare), General Mills, Inc. (Blue Buffalo Company, Ltd.), Diamond Pet Foods, Inc., Virbac, Dechra Pharmaceuticals PLC, Farmina Pet Foods, JustFoodForDogs, The J.M. Smucker Company. The Pet Therapeutic Diet market remains moderately to highly fragmented, with competition expected to intensify as companies accelerate investments in innovation, geographic expansion, strategic partnerships, and portfolio diversification through 2034. In developed markets such as the United States, Germany, France, the United Kingdom, and Canada, competition is increasingly centered on innovation, reimbursement positioning, and value-based healthcare solutions. Meanwhile, emerging markets including China, India, Brazil, and countries across the Middle East and Africa continue to present significant opportunities for expansion due to rising healthcare expenditure, growing patient populations, and increasing access to healthcare services.

What to expect in US Pet Therapeutic Diet Markets in 2026 and beyond- Market Size, Share, Growth Rate, and Forecast to 2034

The US healthcare expenditure is forecast to reach \$8.2 Trillion in 2034 from \$5.5 Trillion in 2026 based on the National Health Expenditure Accounts (NHEA) data. With an aging population, rising chronic disease burden, and increasing migration toward minimally invasive and outpatient care, the Pet Therapeutic Diet market remains one of the strongest-performing segments in the country.

The US Pet Therapeutic Diet Companies are opting new business models, optimized pricing models, industry partnerships, and AI-enabled back end transformations to enhance efficiency and cost management. The US Pet Therapeutic Diet market faces successive waves of challenging trends, with strong opportunities across select segments. The CMS plan to implement Medicaid from 2027 is driving states to build eligibility verification systems throughout 2026. Looking ahead to 2034, we anticipate stronger results underpinned by opportunities exist across Pet Therapeutic Diet industry. On the medical device front, over 7,000 device manufacturers continue to gain from increasing demand from demand for implantable devices, surgical instruments, monitoring equipment, and diagnostic systems.

Canada- Proximity to the US and healthcare similarities to EU5 countries fuel sales of Canadian Pet Therapeutic Diet markets

Canada's strong Pet Therapeutic Diet sales performance is underpinned by an aging

population and a well-developed healthcare infrastructure. Steady growth in new brand spending in rural and urban locations fuel the long-term prospects of small and medium-sized enterprises across medical, diagnostic, and therapeutic devices. The Canadian Pet Therapeutic Diet market presents significant opportunities for U.S. exporters of medical devices, with the U.S. being Canada's largest trading partner for this sector. Potential advantages including specialized materials, advanced manufacturing techniques, and digital technologies support the launch of new products in the country.

Germany Pet Therapeutic Diet Trends and Perspectives to 2034- Financial sustainability, hospital restructuring, demographic pressures, and digitization of care delivery continue to shape the German healthcare industry.

Germany continues to remain the largest Pet Therapeutic Diet market in Europe, driven by over €600 Billion healthcare expenditure, €12 Billion medical device R&D expenditure, statutory health insurance system covering 90% German population, nationwide rollout of the electronic patient record (ePA), and large-volume of Pet Therapeutic Diet population. In particular, Research and development in Germany fuels the commercialization of cutting-edge technologies. Companies across the Germany Pet Therapeutic Diet industry value chain are focusing on both domestic markets and exports. The country is also driving digital adoption with the Hospital Future Act driving hospitals to upgrade their information systems by 2027. Over the forecast period, aging population, rising healthcare costs, and increasing procedural volumes drive the Pet Therapeutic Diet market outlook.

France Market Size, Growth Rate, and Forecast Analysis to 2034- Universal healthcare system, high public healthcare expenditure, and strong government support Pet Therapeutic Diet sales through 2034

France Pet Therapeutic Diet companies are emphasizing on opportunities for rapid, at-scale innovation to boost profitability over the long-term. The country's National Health Insurance spending target (ONDAM) estimates 3.7% growth in the country's healthcare expenditure. Over the forecast period, expenditure control measures, chronic disease management initiatives, workforce reforms, and efforts to improve system efficiency drive the long-term prospects.

The biggest 2026 policy frame is the PLFSS 2026. The law sets the Maladie branch spending target at €271.4 billion for 2026 and fixes the ONDAM at €117.5 billion for city care, €112.8 billion for health establishments, and €18.3 billion for elderly-care establishments and services. France's market is also being pulled by demographics.

INSEE estimates that on 1 January 2026 France had 69.1 million inhabitants, with 22% aged 65 or over. INSEE also reported that 2025 births were 645,000 and deaths were 651,000, producing a negative natural balance of about 6,000 for the first time since the end of the Second World War.

UK Pet Therapeutic Diet Market Size, Share, and Growth Projections to 2034- Rapid growth driven by new and existing brands across the industry value chain

Small high-need consumer segments remain key priority of Pet Therapeutic Diet distributors in the UK industry. Continuous launch of new products coupled with high expenditures support the market outlook. The UK Government financing remains the dominant funding source at 81.3% of total healthcare expenditure, or £280 billion in 2025. According to the ONS, total healthcare spending grew 7.7% nominally and 3.9% in real terms from 2024 to 2025. Similarly, out-of-pocket spending was £49 billion (14.1%) and voluntary health insurance was £9.5 billion (2.8%). The market is driven by rapid digital adoption with NHS England's plan to give more than 500,000 staff access to new AI tools.

China Pet Therapeutic Diet Market Growth Drivers, Revenue Trends, and Forecast- Medical insurance coverage is rapidly expanding over the past few years

China Pet Therapeutic Diet market is undergoing a structural shift from hospital-centric care toward a more integrated system emphasizing primary care, outpatient services, and long-term care. Chinese local players are emerging as a strong pillar of Pet Therapeutic Diet industry, offering opportunities for both competition and partnership. Over the forecast period, new and innovative product launches remain key elements driving market outlook. China's healthcare industry is increasingly centered on expanding healthcare capacity, improving access to advanced treatments, and reducing dependence on imported technologies.

The National Healthcare Security Administration reported that by end-2024, China's basic medical insurance covered 1.32662 billion people and the coverage rate was 95%. Regional disparities in consumer spending trends continue to become more pronounced in the Chinese Pet Therapeutic Diet industry. Over the forecast period, demand will keep shifting toward geriatrics, chronic disease management, rehabilitation, long-term care, and outpatient care, while pricing pressure will remain intense in drugs and consumables because reimbursement.

India Pet Therapeutic Diet Market Landscape: Current Size and Long-Term Growth

Outlook - Increased pricing pressures in US market is encouraging domestic vendors to expand across India

Indian Pet Therapeutic Diet market is witnessing the rapid emergence of an ecosystem that brings together diverse companies across the industry value chain. Further, large-scale healthcare public and private investments and a steady growth in chronic conditions is driving sales of pharmaceuticals and medical devices. Further, non-retail channel is experiencing volume decrease and patients are migrating to the retail. Indian medical device firms are also combining precision engineering with lower labor costs to make world-class diagnostics, robotics, and critical care devices.

Brazil Pet Therapeutic Diet market remains price-driven, with products domestically manufactured and accessibility offering potential opportunities

Healthcare expenditure in Brazil exceeds 10% of GDP, with the country among the highest healthcare spenders in Latin America. ANS reported 53.2 million medical-plan beneficiaries in December 2025, while IBGE projects a steady rise in older-age cohorts, with people aged 60+ already representing about 23% of the population. The price sensitive market access is broad through the public system, private coverage adds a sizeable premium layer, and reimbursement, procurement, and hospital efficiency remain key buying drivers.

Middle East and Africa Pet Therapeutic Diet Industry Trends and Perspectives to 2034

According to the World Bank, the Middle East and North Africa population exceeds 500 million, while Sub-Saharan Africa's population exceeds 1.2 billion, making the broader MEA region one of the fastest-growing healthcare demand centers globally. The GCC countries including Saudi Arabia, United Arab Emirates, Qatar, and Kuwait continue to account for a disproportionately large share of regional healthcare spending. Government-led programs such as Saudi Arabia's Vision 2030 are accelerating investments in hospital infrastructure, private-sector participation, medical technology adoption, and healthcare digitalization. On the other hand, South Africa, Egypt, Nigeria, and Kenya remain key healthcare markets due to their large populations, expanding private healthcare sectors, and growing investments in healthcare delivery systems.

Pet Therapeutic Diet Market Segmentation

By Product Type

Dry Food

Wet Food

By Animal Type

Dogs

Cats

By Indication

Obesity Care

Renal Care

Gastrointestinal Care

Diabetic Care

Joint and Mobility Care

Dental/Oral Care

Oncology Care

Recovery Care

By Distribution Channel

Veterinary Hospitals and Clinics

E-commerce

Retail Pharmacies and Pet Specialty Stores

Leading Companies in Pet Therapeutic Diet Industry (2026)

Colgate-Palmolive Company (Hill's Pet Nutrition Inc.)

Nestle S.A. (Nestle Purina PetCare)

Mars, Incorporated (Royal Canin / Mars Petcare)

General Mills, Inc. (Blue Buffalo Company, Ltd.)

Diamond Pet Foods, Inc.

Virbac

Dechra Pharmaceuticals PLC

Farmina Pet Foods

JustFoodForDogs

The J.M. Smucker Company

Countries Included

North America- US, Canada, Mexico

Europe- Germany, France, UK, Spain, Italy, Nordics, Others

Asia Pacific- China, India, Japan, South Korea, Australia, Southeast Asia,
Others

Latin America- Brazil, Argentina, Others

Middle East and Africa- Saudi Arabia, UAE, Other Middle East, South Africa,
Other Africa

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Gastrointestinal Care

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Virbac

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Farmina Pet Foods

JustFoodForDogs

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