

Dog Food - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2017 - 2029

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Report description:

The Dog Food Market size is estimated at USD 96.33 billion in 2024, and is expected to reach USD 156.60 billion by 2029, growing at a CAGR of 10.21% during the forecast period (2024-2029).

Food products and treats dominate the global dog food market, with veterinary diets emerging as the major pet food segment

- Globally, dogs are the major pets dominating the pet food market due to the higher consumption of commercial pet food and high population. In 2022, dogs held 48.7% of the global pet food market. The share increased by 67.2% between 2017 and 2022 due to the rising dog population and the growing demand for premium products. For instance, the dog population grew by 13.5% in 2022 compared to 2017. The food segment is the largest segment in the dog food market, valued at USD 54.7 billion in 2022. This is because pet food is a staple purchase for most pet owners regardless of their pet breed size or age.
- Treats were the second-largest product type, amounting to a market value of USD 13.3 billion in 2022. Dogs show a preference for treats over other pets. These treats serve multiple purposes, including training, maintaining dental health, and providing rewards. The dog treats market is projected to witness a CAGR of 9.0% during the forecast period.
- Pet veterinary diets are specifically formulated to address specific health conditions in pets, such as urinary tract diseases, renal failure, and digestive sensitivity. They may also be given to pets as a preventative measure to avoid developing specific health issues. During the forecast period, pet veterinary diets are expected to register the highest CAGR of 9.8%, as there is a growing demand for these specialized products.
- The pet nutraceuticals market increased by 19.7% in 2022 compared to 2017, driven by the growing awareness of healthy diets, particularly due to rising health concerns in dogs.
- The market is driven by the increasing dog population, the specific health needs of dogs, and the growing awareness of health

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among dog owners. It is projected to witness a CAGR of 8.8% during the forecast period.

North America dominates the market due to increased disposable income and higher pet humanization in the region

- The global dog food market witnessed significant growth. In 2022, North America emerged as the largest region in the global dog food product market, accounting for USD 36.0 billion, which increased by 81.8% between 2017 and 2022. This growth was driven by the increasing dog population by 17.8% in the same period, increasing disposable income, and the rising trend of pet humanization.
- Europe is the second major region for the dog food market. In 2022, it accounted for USD 19.48 billion in 2022, and it is projected to reach 35.57 billion in 2029. It is associated with increasing awareness about pet nutrition, rising demand for grain-free and natural products, adoption of preventive approaches, and increased dog population in the region. For instance, the dog population in 2022 was 97.0 million, which increased by 14.2% since 2017.
- Asia-Pacific is one of the emerging dog food markets. In 2022, it accounted for 17.5% of the global dog food market, which had a significant growth of 61.9% between 2017 and 2022. This is due to the pet owners increasingly opting for commercial pet food products and the higher population in the region. In 2022, it accounted for 29.1% of the global dog population.
- Africa and South America are the fastest-growing regions in the global dog food market, with projected CAGRs of 12.6% and 12.4% during the forecast period, respectively. This growth is associated with the increasing pet humanization, growing pet population, and a large number of pet owners shifting from home-cooked food to commercial pet food.
- The higher usage of commercial products increased the pet population, and the rise in pet humanization trends are factors expected to drive the market with a CAGR of 8.8% during the forecast period.

Global Dog Food Market Trends

North America and Asia-Pacific have the highest dog populations due to evolving pet ecosystems, along with the availability of dogs for adoption and purchase from animal shelters

- Dogs have a higher share than cats in the global pet population. Globally, the preference for more dogs to be adopted as compared to cats is because people feel more secure with dogs, form unconditional friendships, and the ability of dogs to adapt to the owner's routine. Over the past five years, there has been a rise in pet humanization, which has also helped in increasing the adoption of dogs globally. In developed countries such as the United States and China, a high adoption rate of dogs was witnessed as they treat their dogs as family members and have a strong culture of dog appreciation and animal welfare. For instance, between 2017 and 2018, pet parents who consider dogs as family members accounted for 85% in the United States. In 2020, pet parents in China treated their dogs as family members, accounting for 82.8% of the total pet population.
- North America and Asia-Pacific have the highest number of pet dogs, accounting for 54.6% in 2022, owing to the evolving pet ecosystem, the availability of dogs for adoption and purchase from channels such as animal shelters, and stores offering pet purchases along with services. In North America, there was an increase of 9.6% in the pet dog population between 2020 and 2022 due to the rise in the work-from-home culture and millennials increasingly adopting new pets. This effect was witnessed in other regions as well, such as Asia-Pacific, South America, and Europe. The impact of the COVID-19 pandemic is expected to last for a longer period, as the average lifespan of dogs is 10-12 years. The evolving pet ecosystem, rise in pet humanization, and unconditional friendship of dogs are the factors that have helped in increasing the global pet dog population.

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The increasing shift toward commercial pet food products has contributed to the increase in the expenditure per dog globally

- There has been an increase in pet expenditure for dogs during the study period. The growth in pet expenditure for dogs is due to increasing premiumization and growing concerns about health. These factors helped increase pet expenditure for dogs by 36.4% between 2017 and 2022. Dogs have a higher share of the pet expenditure, which accounted for 39.4% in 2022. This is because dogs consume more pet food than cats and are more likely to be fed specialized pet food.

- Pet parents invest the highest share of their pet expenditure on pet food as they are concerned about their pets' well-being. There has been a rise in providing other services such as pet grooming, pet daycare, and pet walking for better socialization with other pets and good-looking pets. This trend has been witnessed in North America, Europe, and Asia-Pacific. For instance, in India, pet parents feed their dogs with treats from brands such as Pedigree and Royal Canin, and about 65%-70% of the dog expenditure (USD 624) is toward pet food, whereas 20% is other expenses such as pet grooming and pet daycare.

- The purchase of pet food products through online retailers is gaining interest among dog parents. This trend was witnessed in regions such as North America and Asia-Pacific due to the availability of a higher number of products on the website and the ability to compare prices across different retailers. For instance, in 2021, pet parents, including dog owners who purchased pet food online, accounted for 73% of Indian pet parents. Thus, evolving quick e-commerce business in India is expected to increase online pet food sales.

- The rising premiumization and growing concern for pet health are the factors anticipated to increase pet expenditure during the forecast period.

Dog Food Industry Overview

The Dog Food Market is moderately consolidated, with the top five companies occupying 41.66%. The major players in this market are Colgate-Palmolive Company (Hill's Pet Nutrition Inc.), General Mills Inc., Mars Incorporated, Nestle (Purina) and The J. M. Smucker Company (sorted alphabetically).

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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