

Asia-Pacific Pet Food - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-01-16 | 100 pages | Mordor Intelligence

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Report description:

Asia-Pacific Pet Food Market Analysis

The Asia-Pacific pet food market is expected to grow from USD 34.78 billion in 2025 to USD 37.23 billion in 2026 and is forecast to reach USD 52.32 billion by 2031 at 7.04% CAGR over 2026-2031. Rising pet ownership, rapid urbanization, and growing disposable incomes underpin steady volume gains, while premiumization lifts average unit values. Across the region, functional formulations, clean-label positioning, and alternative proteins spur brand differentiation. Digital commerce accelerates consumer reach, and subscription models deepen loyalty as logistics investments improve last-mile reliability. Competitive intensity remains fragmented, though private-equity capital and multinational partnerships signal an emerging consolidation wave in core markets such as China and Australia.

Asia-Pacific Pet Food Market Trends and Insights

Humanization of Pets Boosts Premium Food Demand

Pet humanization is fundamentally reshaping purchasing decisions across the Asia-Pacific region, with companion animals increasingly being treated as family members rather than utility animals. This behavioral shift drives the adoption of premium products, as pet owners seek nutrition solutions that mirror human food quality standards, including organic ingredients, grain-free formulations, and therapeutic benefits. Mars Inc.'s commissioned survey across 20 markets revealed that over one-third of dog and cat owners consider pets "the most important thing in their lives," with Generation Z (45%) and millennials (40%)

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leading this trend. Regulatory influence from nutritional standards and local food safety certifications increasingly validates premium positioning claims, enabling brands to justify higher price points through scientific backing.

Rising Disposable Income in Key Asian Economies

Economic expansion across emerging Asian markets is creating a widening middle class with discretionary spending power, which is being directed toward pet care. The Philippines exemplifies this trend, with the country moving toward upper-middle income status while the pet food market value approaches PHP 24 billion (USD 430 million), driven by households allocating substantial budgets to pet nutrition. The trend accelerates in urban centers where dual-income households and delayed family formation redirect traditional child-rearing expenditures toward pet care, establishing sustainable demand foundations that transcend economic cycles.

Volatile Meat and Grain Input Prices

Raw material cost fluctuations create margin pressure across the pet food value chain, particularly affecting manufacturers with limited pricing power in price-sensitive market segments. Import-dependent markets face additional currency exchange risks, as local currency depreciation amplifies input cost inflation beyond the underlying movements in commodity prices. This volatility forces manufacturers to choose between margin compression and frequent price adjustments that risk customer defection to lower-cost alternatives. Supply chain diversification strategies become essential, though geographic concentration of quality ingredient sources limits manufacturers' ability to achieve true cost stability through supplier diversification.

Other drivers and restraints analyzed in the detailed report include:

Rapid E-Commerce and Last-Mile Logistics Penetration
Functional and Clean-Label Ingredient Adoption
Lengthy Product Registration and Import Approvals

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Food products accounted for a 66.05% share of the Asia-Pacific pet food market size in 2025, and pet veterinary diets are projected to register the fastest CAGR of 8.27% through 2031. Dry kibble remains the volume staple, though wet formats post faster gains as humanization encourages fresh-like textures. Nutraceuticals and supplements are gaining momentum due to the demand for probiotics and omega-3 fatty acids. The freeze-dried treat niche is experiencing double-digit expansion due to its high protein content and convenience. Veterinary diets, although smaller in scale, deliver the highest margins through clinically validated formulations.

Ongoing premiumization prompts manufacturers to prioritize functional claims over sheer volume. Regional innovators, such as Singapore's Majes, introduced climate-specific recipes in 2024, showcasing micro-segmentation strategies. Costlier ingredients and advanced processing raise unit values, sustaining revenue momentum even as mature urban markets approach pet saturation.

The Asia-Pacific Pet Food Market Report is Segmented by Pet Food Product (Food, Pet Nutraceuticals/Supplements, and More), Pets (Cats, Dogs, and Other Pets), Distribution Channel (Convenience Stores, Online Channel, and More), and Geography (Australia, China, India, Indonesia, and More). The Market Forecasts are Provided in Terms of Value (USD) and Volume (Metric Tons).

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List of Companies Covered in this Report:

Alltech Inc. Clearlake Capital Group, L.P. (Wellness Pet Company Inc.) Colgate-Palmolive Company (Hill's Pet Nutrition Inc.) SunRice Group Farmina Pet Foods General Mills Inc. Mars Incorporated Nestle S.A. (Purina) Schell & Kampeter Inc. (Diamond Pet Foods) Virbac S.A. Affinity Petcare SA IB Group (Drools Pet Food Pvt. Ltd.) PLB International The J.M. Smucker Company Archer Daniels Midland (ADM)

Additional Benefits:

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

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