

## **Australia Pet Food - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)**

Market Report | 2026-02-09 | 80 pages | Mordor Intelligence

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### **Report description:**

Australia Pet Food Market Analysis

The Australia pet food market is expected to grow from USD 3.91 billion in 2025 to USD 4.11 billion in 2026 and is forecast to reach USD 5.24 billion by 2031 at 5.0% CAGR over 2026-2031. Premiumization, strong pet humanization, and sustained household spending on companion animals anchor market resilience. Manufacturers are scaling domestic capacity and renewable energy integration to protect margins, while alternative proteins and functional ingredients keep innovative pipelines active. Direct-to-consumer disruptors are reshaping route-to-market economics, prompting incumbents to accelerate omnichannel investments and localized production. Macroeconomic headwinds such as meat cost inflation and supply chain volatility are being mitigated through formulation agility and supplier diversification, preserving value growth in the Australia pet food market.

Australia Pet Food Market Trends and Insights

Premiumization of Pet Diets

Premium positioning has become the primary value creation lever as Australian pet owners increasingly prioritize ingredient quality over price sensitivity. Mars Petcare's investment in renewable energy at its Wodonga facility demonstrates how manufacturers are embedding sustainability credentials into premium product lines to justify higher price points. The premiumization trend is particularly pronounced in freeze-dried and raw food categories, where companies like Freeze Dry Australia are leveraging unique protein sources, including emu, crocodile, and kangaroo, to differentiate from conventional

offerings. This shift toward premium positioning is creating margin expansion opportunities for manufacturers while simultaneously raising barriers to entry for new competitors lacking sophisticated supply chain capabilities. The trend aligns with broader consumer behavior patterns where pet spending remains resilient even during economic downturns, as pet owners view nutrition as a non-discretionary expense category.

#### Humanization of Pets and Treat-like Feeding Behavior

The anthropomorphization of pets is driving fundamental changes in feeding patterns, with treat consumption becoming more frequent and meal-like rather than reward-based. Coles' launch of Swaggle as a dedicated pet marketplace reflects retailers' recognition that pet products require specialized curation and customer service approaches distinct from traditional grocery categories. This behavioral shift is creating new product development opportunities in the treat segment, particularly for products that bridge the gap between meals and snacks. The humanization trend is also manifesting in packaging design and marketing messaging that emphasizes family-oriented benefits rather than purely functional nutrition claims. Regulatory compliance frameworks under AS5812 standards are adapting to accommodate these human-grade ingredient claims while maintaining pet-specific nutritional requirements.

#### Supply-side Pressure from Meat Inflation

Meat price volatility is compressing manufacturer margins and forcing difficult decisions between maintaining profitability and preserving market share through pricing discipline. The cost pressures are particularly acute for premium brands that emphasize high meat content, as ingredient costs can represent 60-70% of total production expenses. Manufacturers are responding through reformulation strategies that maintain protein levels while incorporating alternative protein sources and functional ingredients that justify premium positioning despite higher input costs. The inflationary environment is creating opportunities for private label expansion as retailers leverage their purchasing power to offer competitive alternatives to national brands. Supply chain diversification is becoming critical as manufacturers seek to reduce dependence on single-source protein suppliers and develop relationships with alternative protein producers to hedge against future price volatility.

Other drivers and restraints analyzed in the detailed report include:

Rise of Prescription Diet Demand via Veterinarians  
Mainstream Adoption of Functional Ingredients  
Regulatory Delay on Novel Ingredient Approval

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

#### Segment Analysis

Food products account for a dominant 70.15% market size in 2025, reflecting their essential nature and high purchase frequency among Australian pet owners. Dry pet food remains a significant market presence due to its convenience and shelf stability. Wet pet food is gaining market share, driven by its premium positioning and palatability, which align with the growing trend of pet humanization. The substantial market share of pet food in Australia is primarily attributed to the increasing shift among pet owners from home-cooked meals to commercial pet food products. This segment's growth is further supported by rising awareness among dog owners about pet nutrition, greater adoption of commercial products, and the increasing emphasis on pet humanization. Additionally, the availability of diverse brands and product types, including dry and wet pet food enriched with functional ingredients, has further strengthened the segment's market position.

Pet treats are emerging as the fastest-growing segment, with a 6.1% CAGR through 2031, driven by increased feeding frequency and humanization trends that position treats as meal supplements rather than occasional rewards. The pet treats segment is

particularly benefiting from the growing trend of premium and functional treats, while the veterinary diets segment is expanding due to the increasing focus on specialized nutrition for pets with health issues. The regulatory framework under AS5812 standards ensures product safety while allowing innovation in functional ingredient incorporation, creating opportunities for differentiation through science-backed nutritional claims .

The Australia Pet Food Market Report is Segmented by Pet Food Product (Food, Pet Nutraceuticals/Supplements, Pet Treats, and Pet Veterinary Diets), by Pets (Cats, Dogs, and Other Pets), and by Distribution Channel (Convenience Stores, Online Channel, Specialty Stores, Supermarkets/Hypermarkets, and Other Channels). The Market Forecasts are Provided in Terms of Value (USD) and Volume (Metric Tons)

List of Companies Covered in this Report:

Mars, Incorporated Nestle (Purina) Colgate-Palmolive Company (Hill's Pet Nutrition, Inc.) Clearlake Capital Group, L.P. (Wellness Pet Company, Inc.) Schell & Kampeter, Inc. (Diamond Pet Foods) Real Pet Food Co. EBOS Group Limited Drools Pet Food Pvt. Ltd. ADM Petway Petcare EBOS Group Limited (Black Hawk) Hypro Pet Care Pty Ltd Australian Pet Brands Pty Ltd Ziwi Limited Vetalogica Pty Ltd

Additional Benefits:

The market estimate (ME) sheet in Excel format

3 months of analyst support

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