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UNLOCKING THE POTENTIAL FOR INDIAN FOOD INDUSTRY

2025

Position paper



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PREFACE

As a practicing veterinarian, I see every day how nutrition directly impacts the health, longevity, and quality of life of pets. In India, however, there remains a wide nutritional gap: many pets are still fed home-cooked or improvised diets that often lack the essential nutrients required for balanced growth and long-term wellbeing. While awareness is growing, the absence of clear, science-based standards for pet food means that pet parents are frequently left without reliable guidance on what constitutes complete and balanced nutrition.

Encouragingly, steps such as the introduction of voluntary standards under the Bureau of Indian Standards (BIS) have opened the door for more structured practices. But voluntary frameworks alone are not enough. To bridge these nutritional gaps, dedicated, enforceable regulations are needed ones that set out clear benchmarks for safety, nutritional adequacy, quality control, and labelling. Such regulations would provide veterinarians with confidence in the products they recommend, reassure pet parents about the quality of food they purchase, and drive the industry to innovate responsibly.

This white paper aims to present an objective view of the current market, its challenges, and the opportunities that lie ahead. Most importantly, it highlights how a stronger regulatory framework can close the existing nutrition divide, ensuring that Indian pets receive the same science-based standards of care as pets globally.

As veterinarians, our ultimate responsibility is to the health of animals. I believe this document can serve as a catalyst for meaningful dialogue among policymakers, regulators, industry, and the veterinary community, to create a pet food ecosystem that is safe, trusted, and capable of addressing the nutritional needs of every pet in India.

DR. UMESH KALAHALLI

Independent Veterinarian

EXECUTIVE SUMMARY

India's pet-food market has entered a sustained growth trajectory, driven by rising pet ownership, urban lifestyles, humanization of pet animals, greater awareness of pet nutrition and expanding e-commerce. India's pet population stood at 42.2 million in 2024 and is projected to surpass 100 million by 2035. In terms of revenue, the pet food industry was valued at USD 720 million in 2024 with estimates to reach USD 2 billion by 2035. A double-digit annual growth rate over the past five years highlights the industry's growth potential.

However, India accounts for a small fraction of the pet food industry at just around 1.2% of US and 8% of China's market size. Household penetration of pets remains at just 13% in India, compared to 40–70% in Western markets, leaving significant headroom for expansion. Multinational players remain invested to capture this growth, while homegrown brands are scaling aggressively with cost-competitive or digital-first offering. Premiumization, functional foods and subscription-based distribution that reshaped developed markets are now visible in India, suggesting that the industry is quickly catching up in areas such as digital adoption. These dynamics point to a sector that is young but maintaining high-growth momentum to become a significant contributor to India's consumer economy.

In terms of pet food category, dog food account for the largest share of India's pet-food market at over 85%, yet cat food has emerged as the fastest-growing segment, driven largely by millennials and Gen Zs who prefer lower-maintenance pets suited to smaller apartments. E-commerce has also emerged as a critical enabler of this growth. The share of pet-food sales through e-commerce grew from 4% in 2018 to 16% in 2024, propelled by subscription-based offerings and digital-first brands that cater to convenience-focused pet parents. Whereas traditional channels comprising general and specialty pet retailers alongside veterinary clinics contribute over 80% of sales, indicating a hybrid distribution landscape that balances scale with specialized, subscription driven nutrition.

India's pet food sector continues to rely on imports, especially in the premium and prescription categories where global brands maintain a stronghold. Imports multiplied from USD 58 million in 2019 to nearly USD 138 million in 2024, underlining a gap in local manufacturing capabilities for pet food. Exports are improving but they are mostly mid-tier products and limited to a handful of existing markets. This imbalance presents both a challenge and an opportunity for both the government and the industry. The development of robust domestic processing, R&D and supply chains can cut imports and enable tapping into exports more competitively.

However, despite this growth momentum, the pet food sector in India is still evolving in terms of regulatory coherence, testing infrastructure, and fiscal treatment, which together shape the pace of domestic expansion and export readiness. While the sector is increasingly recognized for its economic potential, further alignment of regulatory and support mechanisms with global benchmarks would enable it to more effectively contribute to India's growth story.

First, the current GST treatment classifies pet food as a discretionary item under HSN 2309, subjecting it to an 18% GST rate despite recent rationalization that lowered taxes on most essential food products. This is significantly higher than essential food items with 5% GST or NIL and directly reduces affordability for middle-income households. A more rational approach, bringing pet food closer to the 5% GST slab applied to human nutrition could prove to be a growth enabler, easing consumer costs, broadening access to premium nutrition and driving deeper market penetration.

Second, India is still in the process of developing a dedicated regulatory framework for pet nutrition. The existing BIS standard 11968:2019 for dog and cat food is voluntary and requires periodic updates to reflect evolving industry practices. While many organized players adhere to global benchmarks, a section of the market—particularly in the unorganized segment—operates with varied levels of compliance, which can create inconsistencies in quality, safety, packaging, and labelling. At present, the FSSAI enforces general food safety rules, but dedicated pet-nutrition standards and wider adoption of IS 11968 would provide greater clarity and predictability. Establishing a harmonized framework, with BIS standards updated regularly and aligned under FSSAI's jurisdiction, would encourage industry accountability, support formalization, and ensure consistent product quality and consumer trust.

Third, global experience highlights the strategic value of dedicated pet-food regulations. In mature markets such as the United States, European Union and, more recently, the Philippines, comprehensive frameworks govern nutrition, safety, labelling and recalls, supported by digital compliance systems, accredited testing networks, and structured industry consultations. India is in the early stages of building such an ecosystem, and while progress has been made, further alignment with international best practices could enhance competitiveness and consumer confidence. Notably, several countries that were not exporting pet food to India until a few years ago have now emerged as meaningful suppliers, underscoring the importance of strengthening domestic standards to support both import management and local industry growth.

As the sector continues on its high-growth trajectory, the development of a more cohesive regulatory architecture will play an important role. By engaging domestic stakeholders and drawing on relevant international experience, India has the opportunity to build a transparent and future-ready pet food ecosystem that supports manufacturers, retailers, and pet parents alike. Industry associations, NGOs, and stakeholders have highlighted areas where improvements could help—such as fiscal treatment, regulatory clarity, and quality benchmarks. With balanced reforms, regulation can serve not as a constraint but as an enabler, fostering responsible growth and positioning India more competitively in the global pet food landscape.

1. OVERVIEW – PET ECOSYSTEM IN INDIA

1.1 Dog and Cat Population: Growth Trajectory

India ranks as the fifth largest pet-owning country in the world. The total pet population (primarily dogs and cats) increased from 24 million in 2019 to an estimated 42.2 million in 2024, growing at a CAGR of 11.6%. The pet population is forecasted to increase to 64.5 million by 2029 and may surpass 100 million by 2035 at an estimated CAGR of 8.9%.

Dogs have historically accounted for a higher share in India's total pet population, accounting for over 87% at almost 37 million in 2024 and is projected to surpass 56 million by 2029 and 94 million by 2035. Dogs are expected to remain the largest segment in absolute terms, highlighting the long-standing societal preference.

Although cats are traditionally less popular in India, their adoption is rapidly accelerating because of evolving lifestyle, especially among younger people (both Millennials and Gen Zs), where smaller living spaces and shifting attitudes toward pet ownership are pushing cat adoption. Cat ownership registered the highest growth in recent years, growing at 16.6% CAGR from 1.9 million in 2019 to 4.1 million in 2024. This population size is projected to cross 6 million by 2029 and 11 million by 2035 at a CAGR of 9.4%.

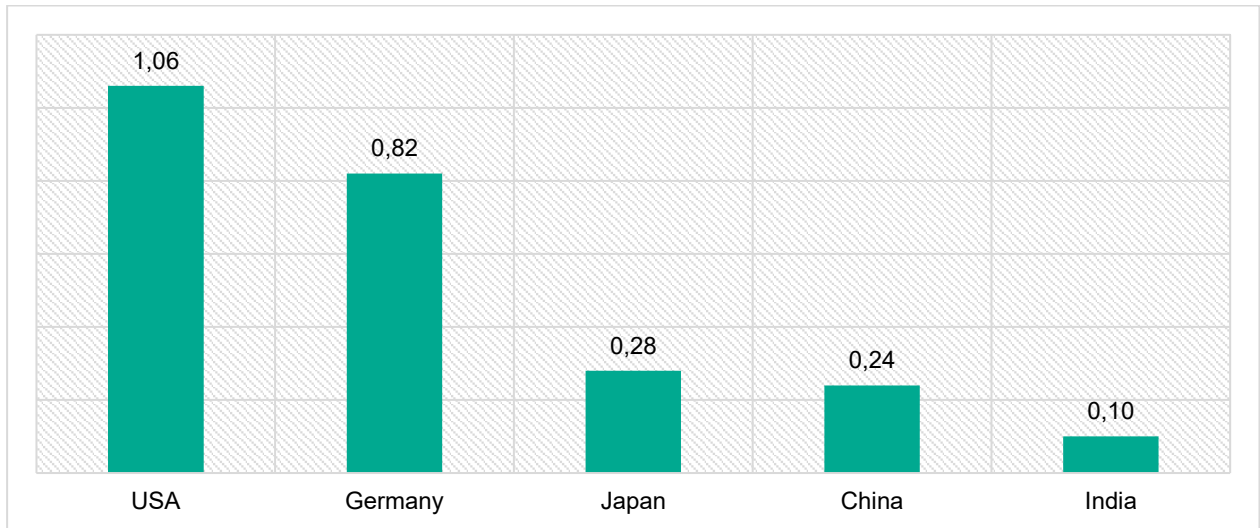
Pet Population in India, in Million, 2019-2035

Category	2019	2024	CAGR % (2019-2024)	2029	2035	CAGR % (2024-2035)
Pet Population (Total)	24.4	42.2	11.6%	64.5	107.2	8.8%
Dogs	21.5	36.9	11.4%	56.5	94.3	8.9%
Cats	1.9	4.1	16.6%	6.4	11.0	9.4%
Fish	0.8	1.0	5.6%	1.2	1.5	4.0%
Birds	0.2	0.2	4.6%	0.2	0.3	3.4%
Small Mammal/ Reptile	0.1	0.1	0.0%	0.1	0.1	0.9%

Source: RPC insights, Euromonitor International, MOFPI

Therefore, there will be high potential for pet care brands, veterinarian services, and lifestyle product providers in absolute growth terms, particularly if they utilize tech-enabled solutions, high-end products and direct to consumer (D2C) distribution channel.

Pet Ownership Per Household, 2024



Source: BBC, RPC Analysis

India's per capita pet ownership remains low at 13% of the Indian households compared to developed regions, but the exponential growth rate sets it apart. Increasing urbanization and lifestyle changes are predicted to narrow this gap toward developed market levels by 2035.

Pet Ownership Patterns

1. Urban v/s Rural:

Urbanization in India is emerging as the most dominant driver, as most new pet-owning households are located in tier 1 and 2 cities. Over 535 million urban dwellers (37% of India's population by 2024 and estimated to reach 600 million by 2030) would propel pet adoption and thereby demand for pet food. India's adoption rates and ownership patterns mirror western pet humanization trends of the past, shifting to companionship and family member status from largely utility in the past.

- **Urban ownership:** Urban centers (comprising major cities such as New Delhi, Mumbai, Bengaluru, and Hyderabad) contribute a considerable share of new pets and pet food demand. In these cities, pet ownership is spreading beyond traditional nuclear families to singles, students and senior citizens.
- **Tier 2/3 Cities:** There is a steady diffusion of trends from metropolitan centers to Tier 2/3 cities, which are also witnessing a growing pet population.
- **Rural uptake:** While rural areas comprise a significant population of dogs, most are not classified as owned pets, reflecting high levels of stray and community dogs. Pet humanization is picking up in rural areas as well, but the speed remains negligible compared to urban or even tier 2/3 cities.

2. Adoption v/s Purchase:

The adoption vs. purchase debate is evolving rapidly. While breed preferences and buying dominated until recently, growing awareness around ethical pet ownership is fueling adoption from shelters and NGOs, especially for indigenous dogs and cats.

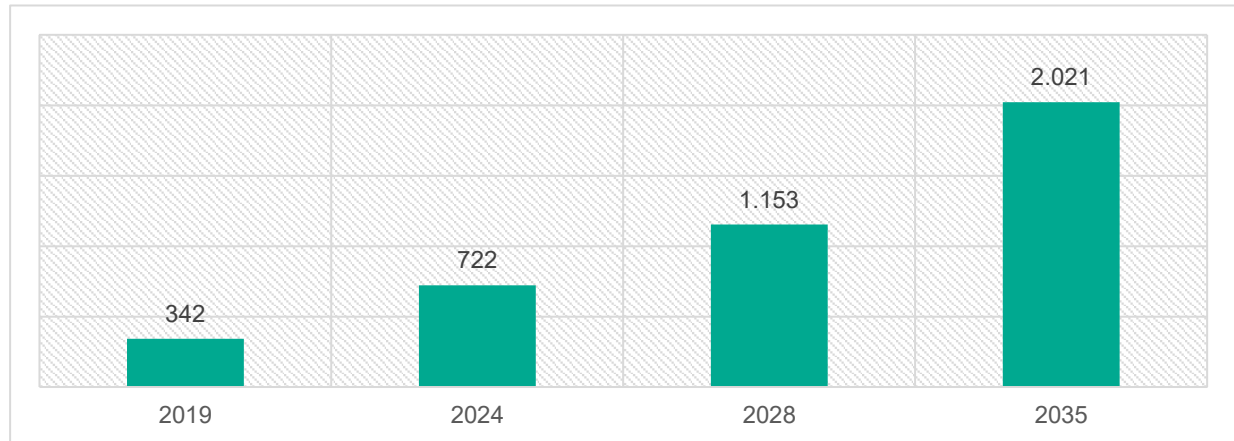
3. Cat v/s Dog Ownership

India's pet ownership landscape continues to be dominated by dogs, which account for more than 87% of the pet population. Cats, traditionally associated with superstition and seen as unsuitable for apartments, have surged in popularity. The cat pet population grew at 16.6% CAGR during 2019–2024, compared to 11.4% for dogs during the same period. Social media campaigns and initiatives undertaken by pet food brands in reshaping perceptions around cats have begun to pay dividends, particularly among Millennials and Gen Z population.

1.2 Pet Food Market Size and Segmentation (by Pet Types)

The Indian pet food market is transitioning from a fragmented, home-cooked or unbranded to a more organized and branded ecosystem. The pet food market was valued at around USD 342 million in 2019, which is estimated to have crossed USD 720 million in 2024.

Pet Food Industry Market Size (Retail), USD Million, 2019-2035



Source: Euromonitor International, MOFPI, RPC insights

The pet food market is expected to grow at 10% CAGR to reach USD 1.2 billion by 2029 and USD 2.0 billion by 2035, driven by the growth in Indian economy and consumer's standard of living, while the overall market gears towards maturity and consolidation.

Pet Food Market Size by Pet Types, USD, Million

Category	2019	2024	CAGR % (2019-2024)	2029	2035	CAGR % (2024-2035)
Pet Food	341.7	721.8	16.1%	1,152.5	2,021.0	9.8%
Dog Food	298.8	595.1	14.8%	919.3	1,549.2	9.1%
Cat Food	32.7	110.8	27.6%	212.8	465.6	13.9%
Other Pet Food	10.2	15.9	9.4%	20.5	27.8	5.2%

Source: RPC insights, Euromonitor International

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Dog food, which accounted for over 85% of India's total pet food market share, is projected to sustain above 80% share through 2035, buoyed by innovation, targeted marketing and people's intrinsic preference for dog ownership.

In contrast, cat food, which contributed 14% of the market in 2024 and emerged as the fastest-growing category in recent years, is estimated to account for approximately 18% share by 2035, propelled by evolving dynamics for higher cat adoptions in the country. Metro cities are witnessing a considerable growth of cat-focused adoption avenues such as cat cafés and rescue centers that reduce barriers to ownership and normalize feline companionship.

The recent surge in e-commerce pet care platforms and on-demand services (such as nutrition delivery and veterinary tele-consultations) have made feline care more accessible, accelerating adoption in major urban centers.

1.3 Indian Pet Food Industry by Volume

The Indian pet food industry has demonstrated consistent and robust growth in terms of volume over the period 2019–2024, growing at 14% CAGR to reach 143 MT in 2024. By 2035, the industry volume is slated to maintain a sustained momentum, more than doubling in size to reach 356 MT in 2035.

Historic and Projected Growth in Indian Pet Food Industry, MT, 2019–2035

Category	2019	2024	CAGR % (2019–2024)	2029	2035	CAGR % (2024–2035)
Pet Food	75.3	142.7	13.6%	216.2	355.9	8.7%
Dog Food	67.6	120.3	12.2%	172.4	265.5	7.5%
Cat Food	6.0	20.0	27.2%	40.9	92.4	15.2%
Other Pet Food	1.6	2.3	7.5%	3.0	4.1	5.5%

Source: RPC insights, Euromonitor International

Volume Growth by Phases

- 2019–2024 (Moderate Uptake). Driven by early adoption of branded packaged food in metro and Tier-1 cities.
- 2024–2028 (Acceleration): Volume surges with emergence and expansion of e-commerce platforms, supermarket penetration and marketing efforts.
- 2028–2035 (Premiumization & Scale): Projected growth marked by increased penetration into Tier-2 and Tier-3 cities. Premium and super-premium product categories are expected to drive higher pet consumption.

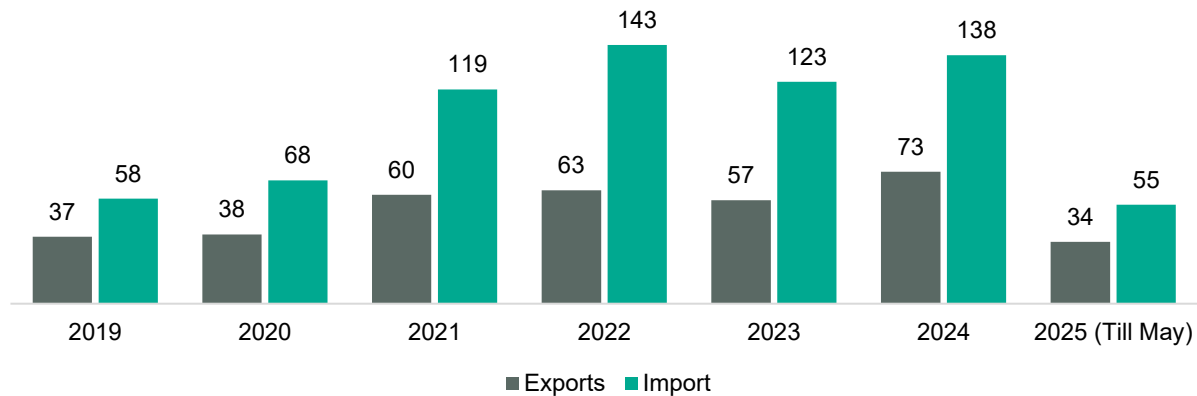
1.4 Export and Import of Pet Food

India's pet food sector has expanded rapidly in the last seven years yet remains structurally dependent on imports. Between 2019 and 2024, dog and cat food exports rose from USD 37 million to over USD 73 million, whereas imports grew from USD 58 million to 138 million mainly due to the demand for premium and specialized formulations.

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The import figures of USD 55 million through Jan-May 2025 already indicate another record full-year in pet food imports. In contrast, exports have registered modest growth. Indian manufacturers remain focused on mid-tier product lines destined for South Asia, the Middle East and Africa.

India's Trade of Dog and Cat Food (USD Million, 2019–2024)

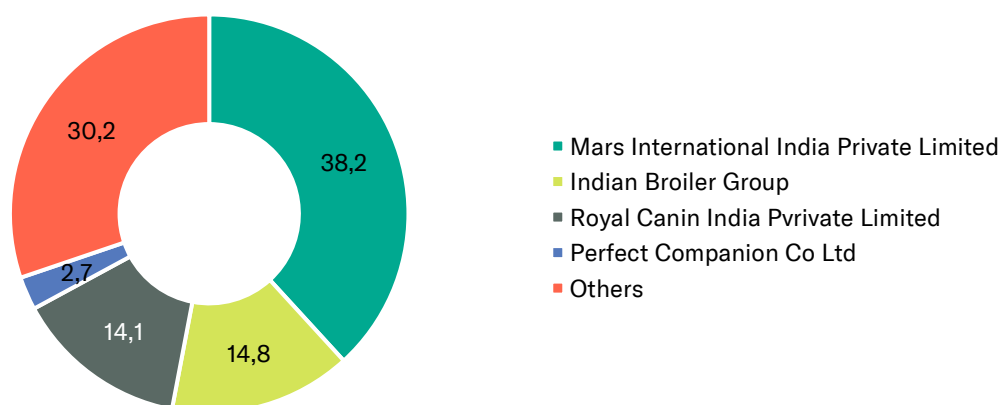


Source: RPC insights, Trade Map, (HS Code: 230910)

This trade imbalance underscores the demand for a robust, urban-driven craving for high-end pet food products in an evolving industry where domestic manufacturers are still in the process of developing their processing, R&D and supply-chain capabilities.

1.5 Key Market Players

India's pet food market is shaped by the presence of several domestic and multinational companies. Over the last few years, the sector has been steadily shifting from being dominated by unbranded or unorganized products to more structured and competitive space.



Source: Euromonitor

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Mars and the Indian Broiler Group (IB Group) have carved out commanding positions in India's pet food market, together accounting for more than 53% of market share in terms of value.

Multinational brands have brought scale, technology and innovative product formats into the Indian market. Mars, for example, had leveraged its global research base and wide distribution network in India to maintain a leading position through premium offerings. Other international companies such as Nestlé Purina and Colgate-Palmolive (Hill's Science Diet) have enhanced their presence, focusing on specialized nutrition segments. The presence of multinational companies in India benefits the industry multifold: It gives expanded choices of products for pet owners and raises benchmarks for safety, quality and product differentiation.

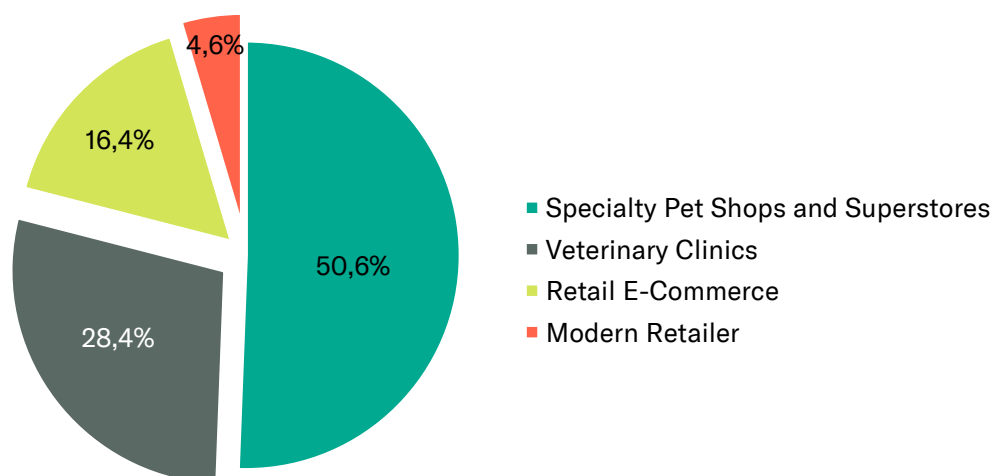
Domestic companies such as the IB Group have emerged as a prominent face with brands such as Drools and PurePet through focusing on cost-efficient manufacturing and competitive pricing. Local firms also work with international partners to co-develop new product lines that meet local demand. In addition, several startups such as Heads Up For Tails, which have adopted direct-to-consumer models and digital-first strategies, have also emerged. These startups players are tapping into younger, urban pet owners through offering convenience, customization and faster product innovation.

However, despite this progress, domestic manufacturing capacity remains concentrated with a handful of firms. Smaller manufacturers lack the scale and thus struggle to invest in modern processing technologies such as freeze-drying and microencapsulation. This limits their ability to compete with international brands on overall consistency, nutritional quality and product innovation.

Quality and compliance remain a challenge for many smaller players. Standards for sourcing, nutrition or packaging and overall regulatory compliance are not given enough attention, and issues such as inaccurate labeling, poor product hygiene and limited shelf-life are not uncommon, particularly in the unorganized segment. These gaps create uneven standards in the market and thus an essential need for a comprehensive regulatory framework, which would protect consumers and help Indian manufacturers gain credibility in global markets.

1.6 Distribution Channels for Dog and Pet Food

The distribution of pet food in India is undergoing a transformation, driven by the rapid expansion of e-commerce and shift towards app-based purchasing behavior.



Source: RPC insights, Euromonitor

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General retailers, specialty pet shops and superstores in metros and upper-income neighborhoods, remain the backbone of pet food distribution, accounting for a combined 50% of the market share. Veterinary clinics follow with 32% share, driven by prescription diets, supplements and specialized care. Modern retail accounts for just 4–5%. Together, these three distribution channels account for over 85% of the total sales.

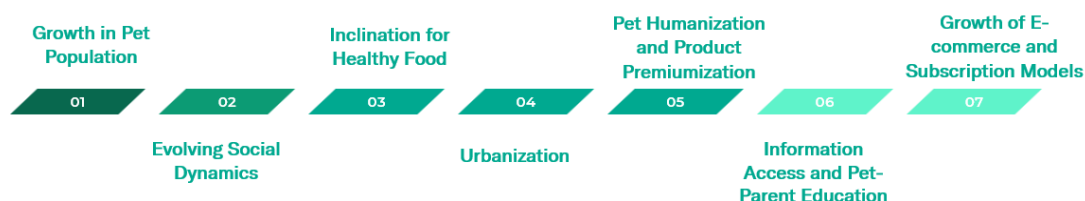
Online channels have grown their share multifold from 4% of pet-food sales in 2018 to 14% driven by millions of internet users, subscription bundles, and faster last-mile fulfilment. The growth rate of online sales has consistently outpaced offline delivery model, growing at 20–25% CAGR in the last three years.

Wider product availability, convenience of home delivery and attractive subscription models that allow consumers to manage recurring purchases efficiently will drive industry growth. Large e-commerce platforms, such as Amazon and Flipkart, dominate in terms of scale of distribution and ease of product delivery. On the other hand, specialized digital-first brands, including Heads Up For Tails, Supertails and Zigly are continuously carving out premium niches through curated product portfolio mixes, customer education and loyalty programs.

1.7 Pet Food Sector- Growth Drivers and Challenges

The Indian pet food industry is projected to be propelled by various constituents of the pet ecosystem. Some of the key propellants/ growth drivers are explained below:

1. Key Growth Drivers



– Growth in Pet Population

The industry's current trajectory can be traced to pet population and income levels of pet parents. India's pet population is projected to reach from an estimated 42 million in 2024 to over 100 million in 2035. While dogs constitute more than 85% of this population, cat adoption is surging, reflecting a discernible attitude shift in urban centers favoring lower-maintenance pets. The projected growth in pet populations, combined with the rising per capita income, will drive for higher adoptions and thus expenditures on pet food products.

– Evolving Social Dynamics

The evolving social dynamics within the country, such as the growth of nuclear families, the tendency towards delayed parenthood, and the need for companionship particularly in urban environments, have resulted in higher pet adoption. Millennial and Gen Z consumers have emerged at the heart of India's pet parenting growth, as they have demonstrated higher willingness to spend on quality nutrition, preventive wellness and lifestyle enhancements for their pets. A considerable number of new pet owners are first timers, with an even higher proportion among urban youth.

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– Inclination for Healthy Food

Heightened awareness about pet health is driving the demand for nutritionally balanced and premium pet food. Pet owners demand formulations tailored to breed, health status and life stage of their pets, mirroring global trends. Increase in demand for dry pet food, wet food, functional treats and nutraceuticals can be witnessed, as there is higher willingness to invest in preventive, specialty, and therapeutic nutrition.

– Urbanization

Urbanization is estimated to fuel the addressable demand for pet food products, especially in metros and Tier 1 cities, where pet adoption correlates with evolving lifestyle factors. Smaller household units, dual-income nuclear families and delayed parenthood in urban areas drive pet adoption.

– Pet Humanization and Product Premiumization

Pet humanization has also changed the perception of cats and dogs from just companions to full-fledged family members, reshaping priorities for nutrition. Pet parents now look for quality ingredients for their pets and target functional benefits and formulas applicable to a specific breed and life stage. This emotional bond fuels premiumization and drives manufacturers to ensure transparency and quality at every step of the value chain.

– Information Access and Pet-Parent Education

Access to information through social media, digital influencers and veterinary networks has also been instrumental in shaping the demand for pet food. Leading brands now initiate and coordinate pet-ownership education campaigns with animal welfare NGOs to disseminate information on breed care, nutritional needs and responsible parenting. Furthermore, e-commerce content, personalized marketing contents and influencer-driven marketing strategies also reinforce the idea of pet parents.

– Growth of E-commerce and Subscription Models

Adoption of digital means has also been driving the pet parents to buy pet food online. This shift is underpinned by the rapid expansion of India's mainstream e-commerce sector, which has prompted pet care e-commerce leaders such as Heads Up For Tails, Supertails, and Zigly to leverage user-friendly platforms, data-driven recommendations, and last-mile logistics.

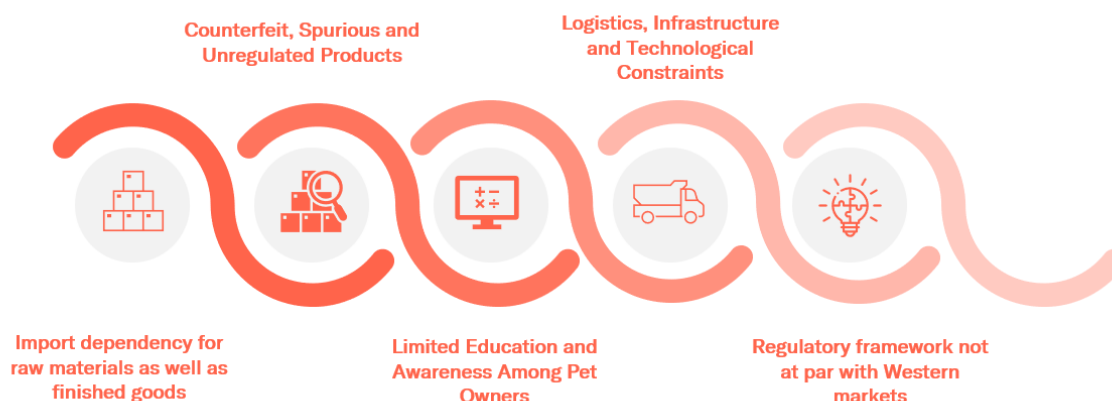
Subscription models are now gaining higher resonance, particularly valued by time-pressed working professionals and urban families. D2C model, often integrated with subscription model, enables pet food manufacturers to build stronger relationships with pet owners, recommend products suited to their specific needs and share personalized contents and upcoming products.

On the other hand, premium brands such as Pedigree, Royal Canin and Drools are deploying multi-channel strategies, integrating physical stores with digital channels to balance convenience, while providing experiential engagements to pet owners.

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2. Challenges

Although the Indian pet food sector remains on a robust growth trajectory, it faces structural, market and regulatory challenges that need to be addressed for sustainable growth. Some of the key challenges are discussed below:



– Import dependency for raw materials as well as finished goods

The cost structure of pet food in India is significantly shaped by global commodity prices, particularly poultry, fish, grains, maize, and soybeans, which together account for nearly 60–80% of input costs in typical formulations. These imported raw materials remain vulnerable to fluctuations arising from global supply disruptions, currency volatility, climate variability, and inflation.

India's import dependence is not limited to raw materials alone. A considerable share of finished pet food products is also imported. In 2024, India imported over USD 138 million worth of pet food and ingredients, leaving local producers and retailers exposed to global market shocks, tariffs, logistics bottlenecks, exchange rate risks, and shifting trade policies.

The seasonality of Indian agriculture further compounds the challenge, with monsoon-dependent supplies adding unpredictability to domestic sourcing. This dual reliance—on imported raw materials as well as finished goods—creates additional vulnerabilities across the value chain.

A stronger domestic manufacturing ecosystem will not only enhance resilience against global disruptions but also support the long-term growth of India's pet food sector.

– Counterfeit, Spurious and Unregulated Products

Counterfeit pet food products present a growing risk to the pet food industry and public confidence at large. Mass-market segments have seen a proliferation of low-quality, mislabeled, or adulterated goods. These products may lack appropriate nutritional balance, contain harmful additives or misrepresent ingredient sourcing, resulting in adverse health outcomes for pets and loss of consumer trust towards the brands.

Recent enforcement actions and industry reports highlight vulnerabilities in both packaging and formulation integrity. The policies are evolving but enforcement mechanisms remain inadequate.

“ Over three decades of practice as a canine behaviorist, I have seen a consistent link between diet and behavior. Poor-quality or unbalanced nutrition often manifests in aggression, hyperactivity, impulsiveness, toilet training issues, and even anxiety. Whereas dietary tryptophan supplementation or protein adjustment can reduce certain types of aggression. As behaviorists, we advise balancing the diet of the dog before working on the behavior. The gut is the second brain, and when diet is corrected, many of these problems improve — sometimes dramatically.”

- Pet Behaviorist

“ Protein levels, tryptophan intake, and overall dietary balance directly influence serotonin availability, impulse control, and cognitive ability. High-quality, well-balanced diets can make a difference.”

- Pet Behaviorist

- Limited Education and Awareness Among Pet Owners

Even though industry stakeholders are investing in awareness campaigns towards pet parenting, still many pet owners remain unaware of the need for adoption of scientifically formulated commercial pet food. Rural areas and older generation of pet parents continue to have a widespread reliance on home-cooked diets, table scraps or unbalanced feeds. Lack of veterinary guidance and cost perceptions, especially in rural areas, exacerbate this widespread challenge.

“ Many pet parents unintentionally follow fad diets or add supplements unnecessarily. Owner awareness campaigns on balanced feeding, obesity prevention, and the gut-brain link are vital.”

- Pet Behaviorist

- Logistics, Infrastructure and Technological Constraints

Processing, logistics and cold chain infrastructure concentrated in a few geographies in India hampers the balanced growth across the country. Processing infrastructure comprising of extrusion, freeze-drying, research labs is concentrated in a few states such as Gujarat, Haryana, Andhra Pradesh and Tamil Nadu. Cold-chain logistics for perishable premium foods remain insufficient, raising costs and shrinking the effective market for advanced products.

- Regulatory framework not at par with Western markets

The regulatory framework governing pet food in India is underdeveloped compared to Western markets. Domestic pet food manufacturing is guided by voluntary BIS norms and is lightly monitored by the FSSAI, whose purview is primarily human food safety. The same are evaluated under a dedicated section on the subsequent pages.

This compliance vacuum leaves the industry vulnerable to the proliferation of low-quality products, impedes efforts to harmonize exports and affects consistent quality. The lack of dedicated pet food regulatory authority and limited mandatory testing result in recurring quality lapses and periodic product recalls, further dampening consumers' trust.

India's pet food industry stands at a critical juncture between rapid expansion and systemic transformation. Rising pet ownership, demographic change, humanization of companion animals, and adoption of technology-enabled commerce and healthcare models are emerging as the core anchors of industry.

This growth must be carefully managed in the context of persistent challenges such as raw material volatility, counterfeit products, regulatory gaps and gaps in awareness. Successful companies and industry policy frameworks can address these challenges by investing in quality, transparency and inclusive access for both urban and emerging market opportunities.

“As pet ownership grows, especially among young, responsible millennial and Gen Zs, the demand for safe and transparent nutrition is only set to rise. India represents one of the biggest markets to manufacture and export high-quality pet foods. However, the absence of a unified regulatory framework creates risks and inconsistencies. With the right framework, our meat and human food industries can integrate seamlessly into pet nutrition, ensuring that no by-products or proteins go to waste. A science-backed, well developed regulatory ecosystem, aligned with global standards, will not only secure quality and safety but also support India's ambition to be a global hub for pet food manufacturing.”

– Industry Consultant

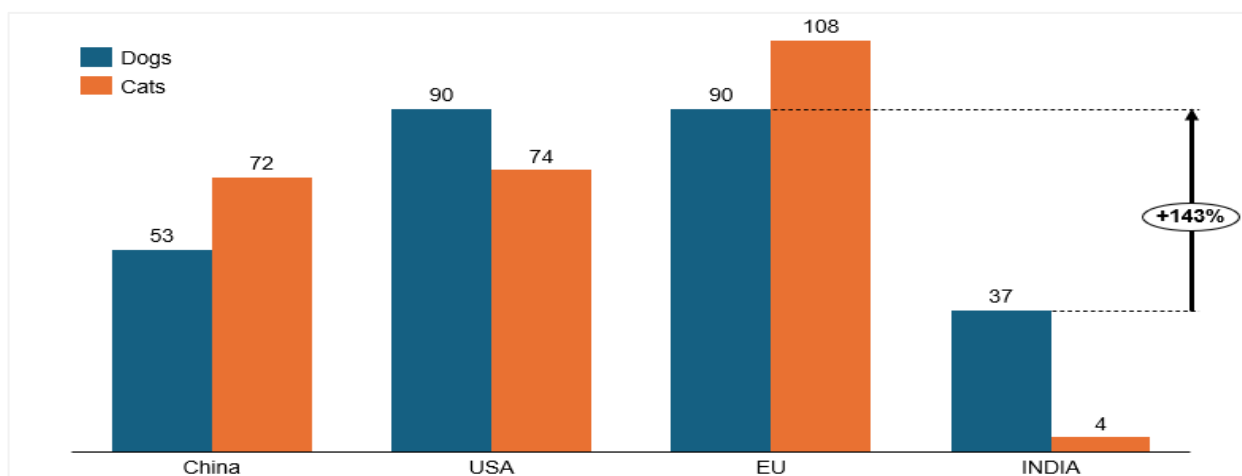
2. PET FOOD INDUSTRY: GLOBAL COMPARISON

2.1 India vs Global Pet Population Growth Trajectory

India's current position in the global pet landscape is distinct. While the total pet population remains smaller than the matured markets such as US, Europe or China, its growth trajectory is unparalleled.

Household penetration rates in the US and EU are already high at 65–70% and 40–50%, respectively. They have limited scope for pet population growth. These markets now expand through premiumization, functional foods and innovation. For India, these global markets serve as a blueprint for future growth pattern – beginning with mass adoption and then shifting towards premiumization.

India vs Global Pet Population, 2024, in Million



Source: Pet Food Industry, Statista

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As evident, India's growth rate is high but rather on the smaller base. With rising urbanization, India is expected to be among the top five fastest-growing pet populations globally. The United States is already a mature market, with flat growth of 1–2%. Europe follows a similar trend with flat annual growth of 1%.

The China vs. India comparison highlights important similarities. In China, cats have overtaken dogs ownership due to space limitation in urban apartments. India is seeing cat ownership growth faster than dog ownerships, suggesting that by 2035, urban cat populations will account for a significant portion of new pet households from the current level, even though the population of dog will continue its dominance.

2.2 India vs Global Pet Food- Revenue

In 2025, the USA is projected to lead global pet industry revenues at USD 62 billion, followed by China, the United Kingdom, Brazil and Germany. In contrast, India's pet-industry represents roughly 1.2% of the US' total and 8% of China's pet industry revenues. This gap reflects India's comparatively small per-capita spend on pet products. India's accelerated investments in local manufacturing capabilities and distribution networks in the recent years through multiple initiatives are expected to bridge the gap between its nascent domestic base and mature global markets.

India vs Global Pet Food Revenue



2.3 India Vs. Global Market Trends

India's pet-food market mirrors the evolution which once unfolded in mature markets.

– Premiumization

In North America and Western Europe, premium and affordable premium segments now account for roughly 45–50% of total pet-food value, driven by breed-specific recipes, clean-label credentials and lifestyle positioning. Leading manufacturers, both domestic and multinationals, have launched

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ingredient-rich formulas which contain quinoa, salmon and duck at price premiums of 15–25% over standard ranges. Premiumization is projected to account for a share of 35–40% by 2030, which suggests that consumers will be inclined to pay for premium products as their disposable incomes expand.

– Functional Foods & Supplements

Between 2018 and 2024, functional foods fortified with vitamins, minerals and botanicals represented nearly 35% of all new product launches in leading markets. These products focused on improving digestion and skin/fur integrity, stress relief and immune boosting have gained higher resonance.

Functional premium products continue to gain traction in India, driven by the need for healthier products for pets and complemented with the increasing purchasing power of consumers and rising disposable incomes. Probiotic-infused fruits are also gaining traction, especially through vet channels and e-commerce bundles.

– Subscription & D2C Models

Subscription models in the US and Europe contribute 15–20% of premium-segment volumes, supported by in-depth product education and loyalty analytics. Digital-first companies have centered on data-driven personalization to build a loyal customer base.

In India, e-commerce's share of pet-food sales rose from 4% in 2018 to 16% in 2024. This sharp growth was fueled by rising digital adoption among urban pet owners, the convenience of doorstep delivery, and increasing trust in online-exclusive brands.

– Role of Veterinarians

In developed markets, veterinary clinics contribute nearly 30–35% of channel volume, serving as trusted advisors for prescription diets and therapeutic supplements. Clinical endorsements drive premium adoption and reinforce brand credibility.

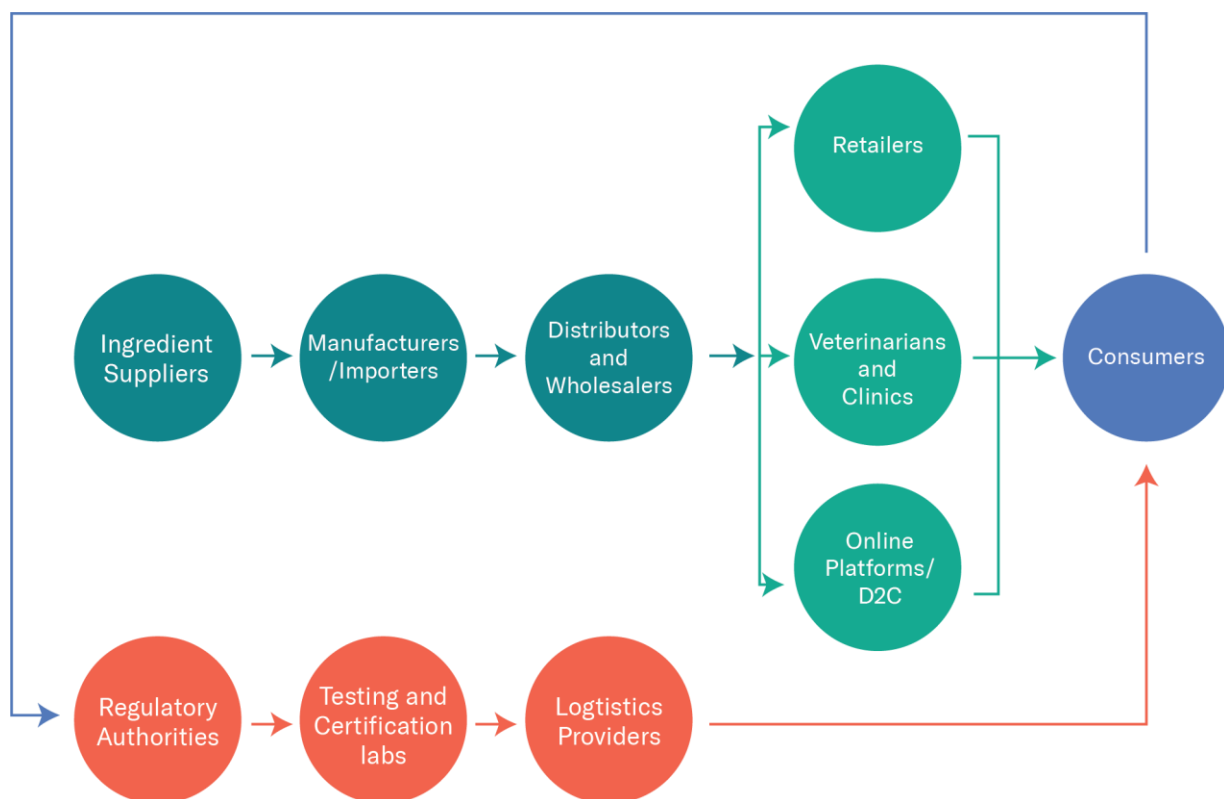
In pet food categories, especially for prescription diets and nutritional supplements, veterinarian clinics account for 28% of pet food distribution in India, outpacing specialty retail. Customers' decisions are disproportionately influenced by this channel, especially those looking for condition-specific formulas and those who are first time pet owners. The veterinarian-led distribution model is estimated to play a key role in the future, especially in the introduction of high-end and functional items as spending on health-conscious nutrition rises.

As evident, India's current growth trajectory for pet-food ecosystem aligns well with global best practices and is on a similar trajectory, albeit still at an early stage.

3. PET FOOD VALUE CHAIN

India's pet-food value chain/ecosystem has been evolving over the years. It encompasses ingredient producers and suppliers (both domestic and imported), manufacturers and importers, regional distributors, retail outlets (specialty shops, clinics, modern trade and kiranas), e-commerce and digital-first platforms. The graphic below breaks down these core participants and the supporting infrastructure including testing labs, logistics providers and regulators that are integral to the sector.

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– Core Participants in the Value Chain

Ingredient Suppliers: Domestic raw material suppliers source poultry, fish and beef meals alongside cereals, pulses and vegetables to supply manufacturers with inputs that form the nutritionally balanced foundation.

Selected animal proteins (beef, venison), specialty fats/oils, flavors, micronutrients, and additives are imported to meet premium/prescription diet requirements and for breed/condition-specific products.

Manufacturers: Organized manufacturers, including global companies such as Mars Petcare, Nestle Purina, as well as prominent domestic companies such as IB Group, create a diverse range of products for cats and dogs. They invest in high-quality, science-based nutrition backed by automation, quality control and R&D, highlighting their commitment to innovation, sustainability and quality.

Significant investments have been made in modern extrusion plants, freeze-drying facilities, in-house labs and packaging plant, particularly in manufacturing clusters in Gujarat, Maharashtra, Haryana, Telangana, and Tamil Nadu. Larger companies have developed vertically integrated supply chains, while D2C and private labels utilize contract manufacturing and food parks supported by Ministry of Food Processing Industries (MoFPI) initiatives.

Importers: India has numerous importers that bring premium pet food products, navigating complex duties and compliance requirements to meet the demand of a growing niche of health-conscious pet parents. Then there are companies such as Royal Canin that import premium and prescription formulas. They handle duties and shelf-life constraints, maintain FSSAI labeling compliance and meet global Hazard Analysis and Critical Control Points (HACCP)/ Good Manufacturing Practices (GMP) standards.

Distributors & Wholesalers: Regional and national wholesalers and distributors connect both importers and manufacturers with retailers and e-commerce platforms. Inconsistent cold chains have generated the need for shared-warehouse models to minimize spoilage for perishable pet food, such as wet food, freeze-dried treats and supplements, and reduce lead time.

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Retailers: Specialty pet shops and superstores anchor the premium segment, offering expert curation, diverse range, and trust for new adopters. Veterinary clinics have become a go-to channel for prescription foods and health-driven products. Modern retail and grocery chains such as D-Mart and Spencer's seem ready to scale rapidly. Meanwhile, kirana and convenience outlets use hyper-local stocking to extend economy and mid-range SKUs into Tier II and III towns.

Veterinarians & Clinics: Veterinarians influence diet choices through sampling programs, co-branded supplements and diagnostic feedback that informs functional-food R&D and prescription portfolio design.

Online Platforms & D2C Aggregators and brand portals. Emerging players such as Heads Up For Tails, Mylopaws and Wiggles harness subscription engines and direct-to-consumer platforms to cultivate loyalty among pet parents, secure predictable revenue streams and accelerate product innovation through continuous user feedback. With robust digital payment, subscription, and doorstep delivery, online distribution has democratized access.

– Supporting Ecosystem

Testing & certification labs: Accredited testing and certification laboratories aim to ensure every product meets Food Safety and Standards Authority of India (FSSAI) and Bureau of Indian Standards (BIS) standards as well as global benchmarks such as Association of American Feed Control Officials (AAFCO) and European Union (EU) certifications, where applicable. Rapid nutrient profiling, contaminant screening and shelf-life trials provide the data needed to substantiate product claims and support export readiness.

Regulatory authorities: Regulatory oversight rests with FSSAI, the Department of Animal Husbandry (DAHD) and the BIS. FSSAI defines ingredient specifications and enforces labeling rules, the Department frames pet-food policy, and BIS sets packaging norms to ensure that the product meets the necessary quality.

Logistics providers: A logistics network of cold-chain operators, 3PL warehouses and last-mile couriers create the value chain together. Investments in IoT-enabled temperature monitoring, dynamic routing software and micro-fulfillment centers are improving quality control as products move from factories to both urban and rural doorsteps.

Mapping these stakeholders in depth can reveal where targeted interventions, such as R&D partnerships, cold-chain financing, regulatory clarity and digital integration, can propel India's pet-food sector into its next growth phase.

4. GOVERNMENT INITIATIVES

The Government has taken various initiatives to develop the food processing sector. While pet food has not yet been designated as a dedicated category, such initiatives can create opportunities for both domestic and international brands operating in the pet food segment. These schemes aim to modernize infrastructure, enhance competitiveness and attract investment for the food processing sector, where stronger participation of pet food manufacturers could be beneficial to the overall industry growth.

– Production Linked Incentive (PLI) Schemes

India's PLI scheme for food processing, backed by a USD 1.2 billion outlay through FY 2026-27, focuses on scaling manufacturing capacity, global competitiveness, and exports in the food processing sector, as well as attracting FDI and domestic investment in value-added food products.

While food processing for human consumption is explicitly covered, it does not cover pet food in particular. However, the policy's cascading benefits have tangibly extended to the pet food segment, particularly through coverage of poultry, eggs, and meat products, which are central to pet food formulations.

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Animal Husbandry Infrastructure Development Fund (AHIDF), with initial outlay of USD 1.2 billion, offers up to 90% credit for establishing new feed and pet food manufacturing units, directly addressing historical supply shortages. The scheme incentivizes investment in plants and machinery, mandate minimum sales thresholds for eligibility, and offers financial incentives to manufacturers. The beneficiaries could be both MSMEs and international brands with investments in India.

– Schemes for Supplier Infrastructure

Pradhan Mantri Kisan Sampada Yojana (PMKSY) scheme envisages building the foundational infrastructure with efficient supply chain management. The scheme focuses on food and feed processing including inputs crucial to pet food such as animal proteins, cereals, and oils. The objectives of PMKSY encompass:

- Development of modern infrastructure for food processing, including mega food parks, clusters, and individual units.
- Setting up effective backward and forward linkages, connecting farmers to the retail outlets.
- Creating robust supply chain infrastructure for perishable goods.

With sub-schemes such as (i) Mega Food Parks, (ii) Integrated Cold Chains and Value Addition Infrastructure, (iii) Infrastructure for Agro-Processing Clusters, (iv) Creation/Expansion of Food Processing & Preservation Capacities, and (v) Food Safety and Quality Assurance Infrastructure, PMKSY aims to modernize the supply chain from farm gate to export terminal.

– MSME Formalization

The Government's drive to formalize and empower Micro, Small, and Medium Enterprises (MSMEs) has direct implications for Indian pet food startups and international brands operating through joint ventures or contract manufacturing. The Government has given higher emphasis on MSME formalization: Udyam registration, digital portals, simplified GST compliance, and schemes such as PMFME.

The Pradhan Mantri Formalization of Micro Food Processing Enterprises scheme (PMFME), with initial outlay of USD 1.2 billion, has already onboarded 1,100 microenterprises into the formal sector. The scheme focuses on providing common infrastructure, credit-linked subsidy, seed capital, marketing & branding grants. This drive has clear implications for pet food startups and global entrants.

– Export Facilitation & Market Access

India's Foreign Trade Policy (FTP) 2023 that focuses on export facilitation, digitization, risk-based approvals, sector-specific support and current Directorate General of Foreign Trade (DGFT) notifications aim to liberalize and streamline trade regimes.

Export of dog and cat foods (HS Code 23091000) has been aligned to specific EU regulations effective September 2025, mandating veterinary inspection, post-mortem certification, and exclusive sourcing from APEDA-registered facilities, directly elevating the quality and traceability of Indian pet food exports. Trade facilitation measures also cover the simplification of documentation, centralized clearance windows, and issuance of Certificates of Origin for both human and pet food consignments. Export Promotion Capital Goods (EPCG) Scheme offers duty concessions on capital imports for setting up advanced pet food plants, favoring both Indian and international brands committed to localization and export.

5. TARIFFS

Tariffs and indirect taxes play a defining role in shaping the cost, accessibility, and competitiveness of pet food in India, directly influencing both imports and domestic market growth.

– Customs Duties: Current Status and Comparative Analysis

Customs duties remain a critical component of market entry cost structures and competitive dynamics. The standard customs duty on pet food imports in India (HSN 23091000) is 20% basic customs duty, 20% customs AIDC, supplemented by a 10% Social Welfare Surcharge (SWC), and 5% IGST. The aggregate import duty on pet food is over 30% for retail products.

While these tariffs protect domestic industry and generate fiscal revenue, these tariffs impact pricing, accessibility, and feasibility of new launches for both homegrown and multinational market players present in the market. Most Indian pet food imports are subject to customs tariff at entry, with exemptions or reductions limited to trade agreements or specific government notifications.

– Goods and Services Tax (GST): Guidelines and Reforms Impacting Pet Food

Since July 2017, pet food—including dry and wet kibble, treats, and supplements—has been taxed at 18% GST (HSN code 2309). Even after the 2025 slab rationalization into 5% and 18% bands, pet nutrition remains in the higher bracket, reflecting its classification as a discretionary rather than essential good.

This higher tax burden reduces affordability for mass-market consumers and constrains industry growth. Despite rising adoption, the sector continues to be viewed as niche and was excluded from priority consideration in recent GST revisions.

Compliance requirements add further complexity. SMEs and importers must register once turnover exceeds about USD 48,000, file regular returns, and comply with invoice-tracking and anti-evasion rules. Importers face an additional burden with IGST levied upfront on the landed cost, including customs duty, freight, and insurance—creating significant entry barriers.

Given that many families treat pet food as part of their regular household spending, aligning its GST rate with human food items (5% or NIL) would ease consumer costs, encourage responsible pet ownership, and expand market demand.

6. REGULATORY FRAMEWORK

The regulation of pet food in India is shaped by the Food Safety and Standards Act, 2011, voluntary benchmark standards of the Bureau of Indian Standards (BIS), and orders issued for animal-origin imports and packaging safety. However, unlike cattle feed or processed human food, the sector lacks a mandatory, category-specific framework, leaving significant regulatory gaps.

BIS Specifications

The BIS specification IS 11968:2019 for dog and cat food is voluntary but serves as an important reference for industry and customs authorities. It covers:

- Ingredient selection, including permitted proteins, cereals, additives, and restrictions on harmful substances
- Nutrient profiles for proteins, fats, fiber, vitamins, and minerals
- Safety thresholds for contaminants such as mycotoxins, heavy metals, and pesticide residues
- Labelling norms covering nutrient guarantees, feeding guidelines, and expiration dates
- Manufacturing hygiene, packaging standards, and process validation

While comprehensive, the voluntary nature of IS 11968:2019 allows manufacturers and importers to bypass these requirements. This creates inconsistencies in quality, encourages informal players, and prevents the establishment of uniform market standards.

FSSAI

FSSAI's mandate extends to pet food only when risks affect human health, such as contamination or entry into the food chain. It enforces packaging, hygiene, and microbiological controls, but has not mandated IS 11968:2019 or introduced binding pet food regulations. Compliance is uneven—stringently applied to larger producers but inconsistently enforced for smaller firms. A stronger, science-backed regulatory framework aligned with global benchmarks would ensure predictability, consumer confidence, and export readiness.

Import Restrictions and Non-Tariff Measures

Imports of pet food containing animal-origin ingredients require Sanitary Import Permits (SIP) under DAHD orders and must undergo clearance at Animal Quarantine and Certification Service (AQCS) stations. Consignments are subject to risk assessments, including tests for pathogens (e.g., avian influenza, BSE), toxins, and contaminants. Plant-based or non-dog/cat products fall under a mix of FSSAI rules, customs procedures, and voluntary BIS guidelines.

Beyond these, importers face a complex web of non-tariff measures (NTMs):

- Documentary compliance (Bill of Entry, IEC, health certificates, lab reports, DGFT licenses)
- Random sampling, microbiological and chemical testing, often batch-wise
- Factory-level audits, spot checks, and traceability/recall requirements under FSSAI Import Regulations, 2017
- Labelling requirements covering declarations, batch numbers, expiry, and full ingredient disclosure, including new mandates for food-grade recycled PET packaging

While these protocols ensure safety, inconsistent enforcement across ports, fragmented mandates between agencies, and limited testing infrastructure often result in costly delays and unpredictability. Non-compliance can lead to detention, destruction, or re-export at the importer's expense.

– Institutional Overlaps and Coordination

Pet food oversight is fragmented across multiple bodies—FSSAI (safety), BIS (standards), DAHD (animal quarantine), DGFT (trade licenses), and Customs (border clearance). Overlapping mandates cause duplication, delays, and inefficiencies, particularly for SMEs. Although digitized platforms such as FSSAI's FoSCoS, FICS, and DGFT's Trade Facilitation Portal exist, there is no single-window compliance mechanism for pet food.

– Industry Needs and Policy Direction

Industry associations have consistently highlighted the need for:

- A unified, enforceable regulatory framework for pet food
- Stronger testing infrastructure and harmonization with global standards
- A single-window digital compliance portal integrating SIP, BIS, FSSAI, and Customs requirements
- Training and guidance for SMEs to adapt to regulatory norms

Creating such a framework, with inter-ministerial coordination and regular stakeholder consultation, would align Indian regulations with international best practices, strengthen domestic production, and support the expansion of pet food exports under the Make in India vision.

“The global pet food manufacturers operating in India can help set up credible pet food manufacturing and marketing regulations that match or surpass global standards. The government should start dialogue with these players to capitalize on the opportunities that exist in India. There are already global pet food guidelines and standards exist, from manufacturing to marketing and even choosing pet foods for consumers. Other Asian countries have already adopted global standards, enabling them to export safe and high-quality pet foods. For India to seize this opportunity, it is time to build strong regulations, credible labeling, and consumer education that prioritize both pet health and industry growth.”

– Industry Consultant

7. COMPARISON BETWEEN INDIA AND MATURE MARKETS IN TERMS OF REGULATIONS

Pet food regulation varies widely across markets, with mature, science-based systems in the EU and US standing in contrast to India's fragmented approach. In Europe and America, comprehensive legal frameworks govern safety, nutrition, labeling, and traceability. In India, the Food Safety and Standards Authority of India (FSSAI) coexist with voluntary BIS guidelines and separate import orders, creating inconsistencies and misalignment with global norms. For India to raise its sector to international standards, the primary task is to close these regulatory gaps through harmonization and structured enforcement.

European Union (EU)

The EU system is centralized under the European Food Safety Authority (EFSA), which issues independent, science-based risk assessments. Regulations mandate:

- Ingredient safety checks and additive approvals
- Guaranteed nutritional composition and batch traceability
- Strict labelling and packaging standards, including use of recycled materials
- Regular inspections and cross-border alerts through the Rapid Alert System

The EU Pet Food Industry Federation (FEDIAF) works closely with the European Commission, ensuring continuous updates, harmonized procedures, and sustainability measures. Mutual recognition of certifications across member states facilitates trade, even under stringent compliance requirements. This combination of strict standards, strong industry collaboration, and transparent enforcement provides both high protection and predictability.

United States (US)

The US Food and Drug Administration (FDA), supported by the Association of American Feed Control Officials (AAFCO), regulates pet food at a level comparable to human food. Key compliance requirements include:

- Ingredient disclosure and nutritional adequacy analysis
- Limits on contaminants such as heavy metals and mycotoxins
- Standardized labelling and marketing claims
- Good Manufacturing Practices (GMPs) and sanitary production environments

The US regime emphasizes science-based hazard management, routine inspections, and progressive enforcement measures, from corrective actions to mandatory recalls. Its predictability, clarity, and alignment with Codex and EU standards make it a globally recognized benchmark.

The EU and US frameworks reveal a critical insight: stringent standards can coexist with strong support mechanisms for compliance. By contrast, India's evolving system suffers from inconsistent enforcement, inadequate harmonization between authorities, and limited testing capacity.

8. ADVANCING INDIA'S PET FOOD SECTOR: PATHWAYS FOR MATURITY AND GLOBAL ALIGNMENT

India's pet food market is poised for sustained growth but continues to evolve within a fragmented regulatory environment. Oversight currently involves multiple authorities — FSSAI, BIS, DAHD, Customs, and Consumer Affairs — with voluntary standards leaving room for uneven compliance. Limited testing infrastructure near ports adds unpredictability, while multiple layers of documentation and varying port-level interpretations create cost and time burdens for businesses. Industry inputs and global benchmarking suggest that a more streamlined, science-based framework would help the sector transition into a mature, internationally credible market.

From comparative analysis with established markets such as the EU and US, and based on representations received from stakeholders, several measures emerge as potential propellants for India's regulatory evolution.

Standardization and Enforcement

India has a BIS specification (IS 11968:2019) for dog and cat food, covering nutrition, additives, hygiene, and labelling. However, its voluntary status means practices vary across producers and importers. Drawing from the experience of other feed categories where standards are mandatory, the gradual adoption of BIS norms as enforceable benchmarks — aligned with global references such as AAFCO and Codex — could provide clarity, create parity across players, and lay the foundation for export readiness.

“ Regulations for the India's pet food market are still evolving, with homemade diets, raw foods, and commercial brands sold without mandatory checks on quality or nutritional balance. This leaves many pets undernourished and pet owners uncertain. Clearer labelling, compulsory standards, and better training for veterinarians and professionals are urgently needed, as nutrition supports both physical and mental health of pets.”

– Pet Behaviorist

“ The underdeveloped standard in India makes it very difficult to assure pet owners of the safety and adequacy of pet foods. Unlike in countries with FEDIAF (Europe) or AAFCO (US) guidelines, Indian labels may not reflect complete formulations and nutrient guarantees. I rely on brands with global validation and scientific backing, since they follow international standards. Without uniform regulations, my advice is often limited to recommending trusted quality products.”

– Veterinarian

Streamlined Oversight

Unlike food for human consumption, where FSSAI is the single statutory authority, pet food currently falls under multiple agencies with overlapping mandates. This creates documentation redundancies

and uneven enforcement across ports. Industry experience suggests that greater coordination or a single-window system could ease compliance, reduce delays, and provide uniform interpretation. A

“ Clients prioritize veterinarians’ advice when it comes to their pet nutrition. Even though we know that we can rely on certain brands because of proven reliability and consistent results over time, it becomes difficult for pet parents to make decisions. Therefore, there should be a well-developed standard for pet food in the country, so that no matter what brands pet owners choose they know that the product has met the basic quality benchmark.”

– Breeder

consolidated approach would also give international investors and exporters greater confidence in India’s regulatory predictability.

Testing and Certification

While NABL/ILAC-accredited laboratories are available, their distribution remains limited relative to industry needs. Import consignments are often subject to repeated or multi-point sampling, leading to warehousing costs and shipment delays. Expanding accredited labs near major ports, with support from public-private participation, could improve turnaround times and reduce compliance costs. Risk-based testing protocols for compliant operators would further build confidence while maintaining safeguards.

“ Largely packaged nutrition available in India is imported. What remains unclear is whether these products are consistently tested, graded, or certified under Indian regulatory frameworks. This lack of visibility makes breeders dependent on trust — we lean on a brand’s international reputation and our own experience rather than formal certification. My confidence in a product comes from knowing it delivers predictable outcomes.”

– Breeder

Customs Duties and Market Access

At present, finished pet food imports attract an effective duty of over 32%, which raises landed costs, especially for premium formulations not yet manufactured locally. A calibrated duty structure, including phased reductions or differentiated rates for niche imports, could encourage greater consumer access while stimulating joint ventures and domestic co-manufacturing. Over time, such a strategy would both expand market access and align with the “Make in India” agenda.

Consistent Market Surveillance

Enforcement today is uneven, with larger organized players subject to audits, while smaller or informal operators often remain outside compliance checks. A uniform inspection and audit framework — covering nutrition guarantees, labelling accuracy, and product stability — would reduce grey-market practices and strengthen consumer trust. Balanced oversight across both offline and online channels would also encourage broader compliance.

“ For packaged pet food in India, from a clinical and practical perspective, we need clearer nutritional adequacy statements (on formulations that meet global standards), transparent ingredient sourcing, detailed nutrient analysis beyond just protein and fat, batch-wise quality testing results, and feeding guidelines tailored by weight, age, and lifestyle. These changes would not only help veterinarians make sound recommendations but also rebuild trust among pet owners, which is currently lacking due to underdeveloped standards.”

– Veterinarian

Industry Development Incentives

Unlike other food categories, pet food is currently outside the Production Linked Incentive (PLI) framework. Extending incentives to this segment could accelerate investment in local manufacturing, promote backward integration, and support exports. Targeted coverage of proteins, marine by-products, and plant-based ingredients could help India emerge as a competitive sourcing hub in Asia.

Animal Welfare and Consumer Awareness

The link between ethical breeding, welfare practices, and demand for quality nutrition remains underdeveloped. A voluntary breeder certification scheme, supported by industry associations and consumer awareness campaigns, could encourage responsible value chains and improve overall trust in pet food products.

Way Forward

Taken together, these measures — drawn from international comparison, domestic industry experience, and past representations — highlight pathways for India’s pet food sector to evolve into a mature, globally competitive market. Standardized norms, streamlined oversight, stronger testing infrastructure, calibrated duties, and industry development incentives will not only strengthen consumer confidence but also position India as a credible hub for both domestic and export growth in pet nutrition.

Disclaimer:

This white paper includes data analysis and visualizations generated with the assistance of artificial intelligence (AI) tools and Microsoft Power BI. AI was utilized to support data interpretation, trend identification, and narrative development, while Power BI was employed for data modeling and visualization. All insights and recommendations presented are based on the data available at the time of analysis and are intended to support decision-making and should not be construed as advice

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