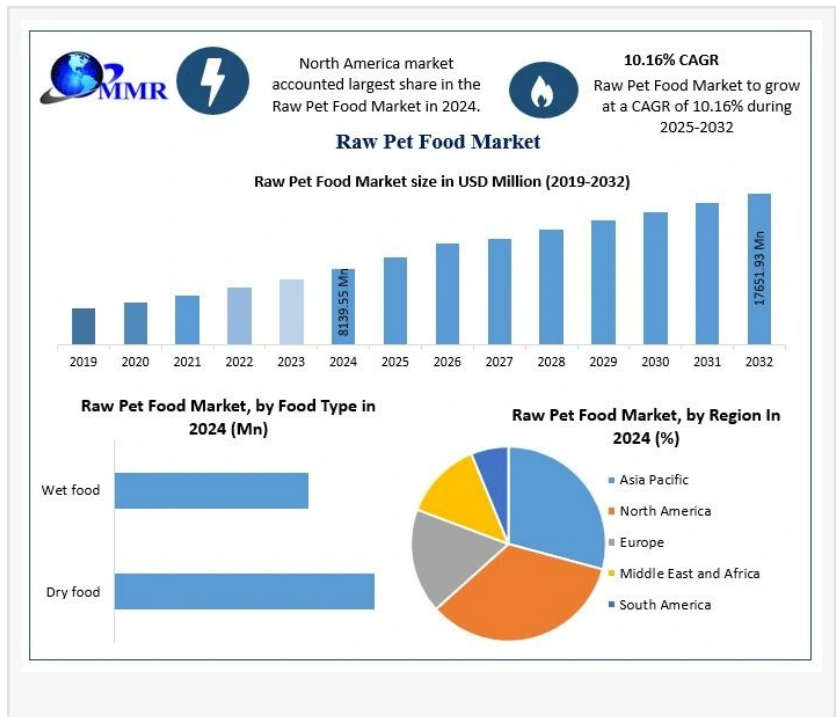


Raw Pet Food Market to Reach USD 17,652 Million by 2032 – Growth Trends & Competitive Landscape

Raw pet food is diets consisting primarily of uncooked meat edible bones and organs designed to mimic natural eating habits of animals in wild.

WILMINGTON, DE, UNITED STATES, October 1, 2025 /EINPresswire.com/ -- The [Raw Pet Food Market](#), valued at USD 8,139.55 Million in 2024, is projected to reach USD 17,651.93 Million by 2032, growing at a CAGR of 10.16%. Growth is driven by rising pet humanization, premium nutrition demand, online sales expansion, and innovations in frozen, freeze-dried, and semi-moist raw diets globally.



Raw Pet Food Market is witnessing rapid growth as pet owners increasingly prioritize natural, biologically appropriate diets for their dogs and cats. Nearly 70% of U.S. households own a pet, and over 44% of dog owners prefer natural or organic food, underscoring the shift from

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Rising pet humanization and demand for premium nutrition are driving unprecedented growth in the global Raw Pet Food Market.

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Dharti Raut

conventional kibble toward raw and minimally processed diets. Premium formats such as frozen, freeze-dried, and semi-moist raw food are gaining traction, while online pet food sales channels are expanding, boosted by subscription-based models and direct-to-consumer delivery. The market's segmentation covers animal type (dogs, cats, others), food type (dry, wet), ingredients (meat-based, plant-based, mixed), life stage (puppy/kitten, adult, senior), and packaging (single-serve, bulk, tray packs), reflecting diverse consumer preferences. Regionally, North America leads, capturing nearly 40% of global pet food spending, while Asia-Pacific grows fastest due to

urbanization and rising disposable incomes. Strategic acquisitions, such as Nutriment acquiring TNPP, and innovations from key players like Freshpet, Primal Pet Foods, and Stella & Chewy's, are further intensifying competition. These dynamics position the Raw Pet Food Market as a fast-growing segment in global pet nutrition.

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| Raw Pet Food Market Segments Covered | |
|--------------------------------------|---|
| By Ingredient Type | Meat-based Vegetarian/Plant-based Mixed/Combination |
| By Form | Frozen Raw Freeze-dried Fresh Semi-moist |
| By Pet Age | Puppy/Kitten Adult Senior |
| By Packaging Type | Single-serve Packs Bulk Packs Tray Packs |
| By End-User | Household Veterinary Clinics |
| By Region | North America- United States, Canada, and Mexico Europe – UK, France, Germany, Italy, Spain, Sweden, Russia, and the Rest of Europe Asia Pacific – China, South Korea, Japan, India, Australia, Indonesia, Philippines, Malaysia, Vietnam, Thailand, Rest of APAC Middle East and Africa - South Africa, GCC, Egypt, Nigeria, Rest of the Middle East and Africa South America – Brazil, Argentina, Rest of South America |

Rising Pet Humanization Driving Nutritional Demand

The growing humanization of pets is accelerating the demand for raw pet food, as owners increasingly seek natural, biologically appropriate diets for their dogs and cats. According to the American Pet Products Association (APPA), nearly 70% of U.S. households own a pet, and over 44% of dog owners now prefer natural or organic food options. Raw diets are associated with better digestion, stronger immunity, and healthier skin and coats, making them a popular choice among premium buyers. In addition, the expansion of pet food e-commerce, which recorded a 30% year-on-year sales growth, is making raw pet food more accessible and convenient. These factors collectively position raw pet food as a fast-growing segment in the pet nutrition industry.

Safety Concerns and Cost Barriers Restraining Growth

Despite rising interest, safety concerns and high costs remain major challenges in the Raw Pet Food Market. The U.S. FDA has documented over 25 recalls of raw pet food in the past five years due to bacterial contamination, raising consumer awareness about food safety. Furthermore, raw diets are often 2–3 times more expensive than conventional kibble, which restricts adoption among middle-income households. The need for specialized cold-chain logistics to maintain freshness further increases production and distribution costs. These barriers emphasize the importance of quality assurance, regulatory compliance, and cost-efficient innovation to ensure wider adoption of raw pet food.

Diverse Segments Defining the Raw Pet Food Market

The Raw Pet Food Market is segmented by animal type, food type, and sales channel, reflecting diverse consumer preferences and evolving dietary trends. By animal type, the market is divided

into dogs, cats, and others, with dogs representing the largest share due to higher adoption rates and broader product availability of raw diets. In terms of food type, the market is categorized into dry food and wet food, with dry food commanding a majority share of 62.13% in 2024, favored for its convenience in storage and handling. Wet raw pet food, while accounting for a smaller share of 37.89%, is highly valued for its higher moisture content and palatability, crucial for pets requiring increased hydration or those with dental issues. Regarding sales channels, the market is classified into online and offline channels; online sales are experiencing significant growth, fueled by subscription-based models and direct-to-consumer delivery, while offline channels including pet specialty stores and supermarkets remain critical for accessibility, brand visibility, and trust. This structured segmentation highlights how consumer preferences, convenience, and premium quality are driving the evolution of the Raw Pet Food Market globally.

Regional Trends Shaping the Raw Pet Food Market

The Raw Pet Food Market shows distinct growth patterns across regions, with North America leading the industry as the U.S. accounts for nearly 40% of global pet food spending, supported by premiumization and high pet ownership rates. Europe follows closely, where countries like Germany and the U.K. emphasize organic and sustainable raw diets, driving innovation in eco-friendly packaging and locally sourced meat. Meanwhile, Asia-Pacific is the fastest-growing region, fueled by urbanization, rising disposable incomes, and a cultural shift toward premium pet care in China, Japan, and India. Latin America and the Middle East are also emerging, with Brazil witnessing a steady rise in pet humanization trends. Collectively, these dynamics highlight how regional preferences, regulations, and income levels shape opportunities for raw pet food brands worldwide.

Strategic Acquisitions and Expansions Fuel Market Growth

In 2025, Nutriment Company, a leading provider of premium natural pet food, acquired Totally Natural Pet Products (TNPP), a Scottish manufacturer specializing in raw dog food. This acquisition aims to expand Nutriment's portfolio and strengthen its presence in the Central European Raw Pet Food Market.

Vital Essentials, the flagship brand of Carnivore Meat Company, announced strategic partnerships with Anipet Animal Supplies Inc. and Freedom Pet Supplies Inc. to enhance its distribution network across Canada. These collaborations are expected to broaden Vital Essentials' reach and cater to the growing demand for raw pet food in the region.

Consumer Trends Drive Innovation in Raw Pet Food Offerings

The trend of pet humanization is significantly contributing to the growth of the Raw Pet Food Market. Pet owners are increasingly treating their pets as family members, leading to higher spending on premium pet food products. This shift is prevalent in developed regions such as North America and Europe, where demand for high-quality natural and organic pet food is on the rise.

According to a 2024 survey, over 60% of pet parents in North America prefer natural or minimally processed diets, underscoring the shift from traditional kibble toward raw and freeze-dried options. This growing awareness is driving innovation and expansion in the Raw Pet Food Market.

Battle of the Bowls: Leading Brands Reshape Raw Pet Food Market

The Raw Pet Food Market is experiencing dynamic competition as established and emerging brands vie for dominance. Freshpet, a frontrunner in the fresh refrigerated pet food segment, has captured approximately 95% of the U.S. bricks-and-mortar market, achieving nearly \$1 billion in revenue in 2024. Similarly, Primal Pet Foods and Stella & Chewy's are expanding their portfolios with innovative offerings like enhanced omega-3 profiles and immune-support ingredients. Global giants such as Nestlé Purina PetCare and General Mills are also making significant inroads, with Nestlé Purina's partnership with Open Farm to co-develop a premium frozen raw dog food line across North America, and General Mills introducing a fresh version of its Blue Buffalo brand to compete with established fresh pet food brands. These strategic moves underscore the intensifying competition and innovation within the raw pet food industry.

Key Players of Raw Pet Food Market

North America

3P Naturals (Canada)
Canada Raw (Canada)
Instinct Pet Food (USA)
Primal Pet Foods (USA)
Totally Raw Pet Food (Canada)
Raw Pet Food Supplies (Canada)
Europe

4PAWSRAW (UK)
Çagatay Pet Food (Turkey)
Asia-Pacific

Big Dog Pet Foods (Australia)
D.C. (South Korea)
Korea Pet Food Co., Ltd (South Korea)
Analyst Recommendation:

Investors and stakeholders should monitor the Raw Pet Food Market closely, as rising pet humanization, premium nutrition trends, and expanding online distribution channels drive growth. Strategic acquisitions and product innovations by key players present lucrative opportunities, while ensuring safety compliance and cost efficiency remains critical for long-term success.

Maximize Market Research is a leading market research and consulting firm. We provide comprehensive market research and consulting services to help businesses make informed decisions. Contact us today for more information.

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Frequently Asked Questions (FAQs) – Raw Pet Food Market

What are the benefits of feeding my pet a raw diet?

Ans. Feeding a raw pet food diet can offer several benefits, including improved digestion, healthier skin and coat, increased energy levels, and enhanced immunity. Raw diets, including raw dog food and raw cat food, may also lead to better weight management and smaller, less odorous stools.

Is raw pet food safe for my pet?

Ans. While raw pet food provides nutritional benefits, it carries safety risks if not handled properly. Contamination with bacteria like Salmonella or E. coli can affect pets and humans. Purchasing from reputable suppliers and following safe storage and handling practices ensures the safety of raw dog food and raw cat food.

How do I transition my pet to a raw food diet?

Ans. Transitioning to raw pet food should be gradual. Start by mixing small amounts of raw dog food or raw cat food with your pet's current diet, increasing the portion over 7–10 days. Monitor your pet's response and consult a veterinarian if needed to ensure safe adaptation.

Related Reports:

Raw Pet Food Market: <https://www.maximizemarketresearch.com/market-report/global-raw-pet-food-market/108810/>

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