FOOD PROCESSING

Towards Sustainable Growth Opportunities

Sector Profile
Pet Food

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Preface

The Indian food-processing sector has witnessed remarkable growth, during the last 9 years ending 2023-24 with Average Annual Growth Rate (AAGR) of around 6.55% as compared to around 6.06% in manufacturing at 2011-12 prices. The sector constituted as much as 7.93% share of FPI in manufacturing sector in 2023-2024. The sector is one of the largest employment providers in the organised manufacturing sector with 12.91% employment in the total registered/organised sector. This highlights its competitiveness and capacity to cater to global markets.

India is the world's largest producer of milk, pulses and jute and ranks as the second largest producer of rice, wheat, sugarcane, groundnut, vegetables, fruit and cotton. It is also one of the leading producers of spices, fish, poultry, livestock and plantation crops. This abundant raw material base offers immense potential for value addition and export. Notably, India reported the processed food exports amounted to USD 10.09 billion in 2024-2025 with significant shares in processed vegetables and fruits, pulses, cereal preparations etc. Further, the sector has attracted 7.21 billion FDI inflow in the last one-decade ending 2024-25. Recognizing the sector's significance, Ministry of Food Processing Industries has extended support and incentives for creation of modern infrastructure with efficient supply chain management, creation of employment opportunities, reducing post-harvest losses, increasing the processing level and enhancing export of the processed foods.

Among the food processing sector, the pet food segment emerging as a niche yet rapidly expanding market. Supported by evolving consumer lifestyles, rising disposable incomes, and growing awareness around pet nutrition, the segment has become a focus area for both domestic players and international brands. India's growing pet population, especially in urban areas, combined with changing attitudes toward pet care, has driven demand for scientifically formulated and premium pet food products. The sector has evolved from an unorganized, home-cooked feed landscape to a formalized, branded packaged food industry.

The growth potential of the pet food sector is further amplified by increased investments, digital retail expansion, and a supportive startup ecosystem. As global markets recognize India's demand and sourcing strengths, the country is poised to emerge as a hub for pet food innovation and manufacturing.

1. Introduction

The Pet Food market covers food that has been specifically created to meet the nutritional requirements of domesticated animals, including dogs, cats, as well as feed products for other less common house pets such as rodents and reptiles. Various components that supply vital nutrients for the animal's health and wellness are often included in pet food.[1]

A robust pet food processing industry, supported by scientific advancements and responsive regulatory frameworks, is critical for ensuring animal health, enhancing product quality, reducing dependency on imports, and creating sustainable supply chains. Pet food plays a vital role not only in pet care and well-being but also in supporting veterinary nutrition, food safety, and industry innovation.

Global Scenario of Pet Food: The global pet food market has grown significantly, driven by increased pet adoption, premiumization, and awareness about pet nutrition. According to IMARC, the global pet food market reached a value of USD 123.6 billion in 2023 and is expected to grow to USD 167.3 billion by 2028, with a CAGR of 6.2%. The demand for natural, organic, and specialty pet foods—such as breed-specific and age-specific formulations—is witnessing sustained rise, especially in developed economies[2].

North America dominates the market, followed by Europe, due to high penetration of companion animals and established retail infrastructure. Asia-Pacific is emerging as a high-growth region with increasing urbanization, nuclear families, and changing consumer lifestyles influencing pet ownership and spending habits[3].

India's Position in the Global Pet Food Ecosystem: Though a late entrant, India is now one of the fastest-growing pet food markets globally. Rising income levels, pet humanization trends, and digital retail have catalysed domestic consumption. With an estimated 35 million pets and growing, India is evolving into a key strategic market for global pet food companies. The opportunity lies not only in demand but also in positioning India as a manufacturing base for exports.

Table 1 Pet population in India: number of animals in '000s, historic and forecast[4]

Category	2018	2023	CAGR* % 2018-2023	2024	2028	CAGR* % 2023-2028
Pet Population (Total)	22,112.5	38,463.1	11.7	42,165.1	58,706.8	8.8
Cat	1,743.6	3,666.6	16.0	4,072.2	5,752.0	9.4
Dogs (total)	19,431.5	33,606.2	11.6	36,853.9	51,527.4	8.9
Small Dog (up to 20 pounds or 9 kilograms)	8,671.7	16,911.5	14.3	18,729.5	26,769.5	9.6

[1] https://www.statista.com/outlook/cmo/food/pet-food/worldwide
[2] https://www.imarcgroup.com/global-pet-food-market
[3] https://www.imarcgroup.com/global-pet-food-market
[4] Sector Trend Analysis – Pet food trends in India - agriculture.canada.ca

Medium Dog (20 to 50 pounds or 9 to 23 kilograms)	2,996.7	4,668.4	9.3	5,069.9	6,860.0	8.0
Large Dog (Over 50 pounds or over 23 kilograms)	7,763.0	12,026.3	9.1	13,054.5	17,897.9	8.3
Bird	153.0	188.1	4.2	196.2	222.0	3.4
Fish	708.8	923.6	5.4	963.7	1,123.0	4.0

Need for Formalization and Innovation: Historically, India's pet food segment was dominated by home-cooked food and table scraps. However, increasing health consciousness among pet owners, rise of vet-prescribed diets, and growing awareness of nutritional needs have led to greater demand for scientifically developed, processed pet foods. Enhancing processing capacity, adhering to global safety norms, and fostering innovations in formulation, packaging, and functional benefits are central to the sector's next phase of growth.

2. Global Trends in Pet Food

The global pet food sector has undergone significant transformation, evolving from a limited range of mass-produced kibble into a highly segmented and specialized market. As of 2025, global revenue in the pet food market is projected to reach USD 158.42 billion, with an anticipated CAGR of 5.79% through 2030. In terms of volume, global demand is expected to touch 62.84 billion kilograms by 2030, with a per capita consumption of 6.9 kg in 2025.[5]

The United States remains the largest contributor to global revenue (~USD 62 billion in 2025), driven by its established pet ownership base and innovation in premium products. Dogs continue to dominate the animal type segment, holding over 60% of the global market share, supported by growing demand for tailored nutrition such as[6]:

- Puppy and adult stage-specific diets
- Formulations for aging pets
- Breed-specific and functional diets

2.1 Product Diversification:

With the pet population growing, the scope for pet food is better than ever, especially given the variety to cater to. The pet food market is segmented by product type, source, animal type, nature, and region. By product type, the market is divided into kibble/dry (extruded, baked, coated), dehydrated food, freeze-dried cooked, freeze-dried raw, wet food, frozen, raw food, powder, and treats & chews (dog - paste, cremes, crunchy snacks, chew sticks, tablets, biscuits, jerky, rawhide; cat - pastes, crèmes, crunchy snacks, chew sticks, tablets, biscuits, cat milk/milk snacks). Based on the source, the market is segmented into animal-derived (fish, chicken, duck, beef, pork, venison, lamb, turkey), plant-derived, and insect-derived (crickets, mealworms, black soldier flies). By animal type, the market is bifurcated into cats (kittens, seniors), dogs (puppies, adults, seniors), birds, and others (rabbits, hamsters)[7].

Global consumers are increasingly drawn to natural, organic, and functional pet foods. Plant-derived, insect-based, and allergen-free formulations are expanding. Innovations include personalized pet diets and subscription-based delivery models to address dietary restrictions, health conditions, or behavioural issues.

Dogs are to lead the Animal Type Segment with Over 60% Market Share. This is supported by higher pet ownership rates globally and rising demand for premium treats, age-specific formulations, and breed-targeted diets that cater to diverse nutritional needs.[8]

- Puppy and adult diets dominate with targeted nutrition profiles.
- Rising demand for senior dog food is driven by aging pet populations.
- Breed-specific diets are increasingly marketed for tailored nutrition.

[5] https://www.statista.com/outlook/cmo/food/pet-food/worldwide
[6] https://www.imarcgroup.com/global-pet-food-market
[7] https://www.futuremarketinsights.com/reports/pet-food-market
[8] https://www.futuremarketinsights.com/reports/pet-food-market

2.2 Emerging Trends of the sector:

- Organic Food: There is a growing trend towards natural and organic pet food products, as consumers become more conscious about their pet's health and well-being. This trend is expected to continue, with pet owners increasingly seeking transparency in the sourcing and production of their pet's food. In addition, there is a rise in customized pet food options, driven by the demand for personalized nutrition plans for pets with specific health conditions. These trends present opportunities for pet food companies to differentiate themselves in the market and cater to the evolving needs of pet owners.

- Sustainability and Ingredient Innovation: With sustainability becoming a defining theme across the food industry, pet food manufacturers globally are investing in alternative protein sources. Insect-based proteins (e.g., black soldier fly, crickets), plant-based protein blends, and lab-cultivated meat are gaining attention for their lower environmental footprint and hypoallergenic potential.[9]

- Packaging and Clean Labeling: There is a sharp rise in demand for eco-friendly, recyclable packaging formats, along with clean-label transparency. Consumers are looking for ingredient traceability, no artificial additives, and claims around 'human-grade' standards.[10]

- Retail Evolution: The post-pandemic shift to e-commerce has accelerated direct-to-consumer (D2C) sales models. Subscription services, customized delivery options, and smart packaging (with freshness indicators and digital tracking) are reshaping the retail experience.[11]

2.3 Regulatory Alignment and Food Safety Standards:

Pet food manufacturers are increasingly aligning with globally recognized food safety frameworks:

- AAFCO (USA) nutrient guidelines for dogs and cats[12]
- FEDIAF (Europe) guidelines for formulation and labeling[13]
- GFSI-benchmarked certifications such as BRCGS, FSSC 22000 These standards facilitate global trade, ensure consumer safety, and are becoming mandatory for exporters targeting developed markets.[14]

[9] https://www.petfoodindustry.com/blogs-columns/adventures-in-pet-food/blog/15679518/how-pet-food-consumers-globally-view-sustainability
[10] https://nielseniq.com/global/en/insights/analysis/2025/global-pet-expo-2025-key-trends-themes/
[11] https://www.researchandmarkets.com/reports/5610083/pet-food-market-size-share-trends-analysis
[12] https://www.aafco.org/consumers/understanding-pet-food/selecting-the-right-pet-food/
[13] https://europeanpetfood.org/wp-content/uploads/2022/02/FEDIAF_labeling_code_2019_onlineOctober2019.pdf
[14] https://fsns.com/which-gfsi-certification-is-right-for-my-business/

3. Overview of Pet Food in India

India's pet food sector has transitioned from a niche, largely unorganized category to one of the fastest-growing consumer goods segments in the country. The increasing pet population, urbanization, nuclear family structures, rising disposable incomes, and greater awareness of animal health are catalysing the demand for packaged, processed pet foods.

The India pet food market size was valued at USD 2.4 Billion in 2024. Looking forward, IMARC Group estimates the market to reach USD 4.6 Billion by 2033, exhibiting a CAGR of 7.2% from 2025-2033. The market is expanding due to the rising pet adoption, especially in urban households, and a growing awareness about pet health and nutrition. Inflating disposable incomes allow pet parents to spend more on specialized, premium food products. The wider product availability through online and offline channels, and endorsements by veterinarians are further encouraging demand. Additionally, pet humanization trends are driving the demand for functional and organic pet food, therefore expanding the India pet food market share.[15]

Table 2 Pet food retail value sales by product category - Historical and forecast retail value sales in USD millions and growth[16]

Category	2018	2023	CAGR* % 2018-2023	2024	2028	CAGR* % 2023-2028
Pet Food	**245.4**	**629.6**	**20.7**	**730.1**	**1,268.8**	**15.0**
Cat Food	24.7	89.8	29.5	108.4	216.2	19.2
Dog Food	220.3	539.0	19.6	620.7	1,051.3	14.3
Bird Food	0.1	0.2	14.9	0.3	0.4	14.9
Fish Food	0.3	0.5	10.8	0.6	0.9	12.5

3.1 Trade Performance

India's Export & Import Performance: India's exports of dog and cat food (HS Code 23091000) increased from USD 57.33 million in 2023 to USD 73.02 million in 2024. Other animal feed preparations (HS Code 23099090) reached USD 216.29 million in 2024. Meanwhile, imports of pet food stood at USD 137.47 million for the same year[17]

[15] https://www.imarcgroup.com/india-pet-food-market
[16] Sector Trend Analysis – Pet food trends in India - agriculture.canada.ca
[17] ITC Trade Map

Table 3: India's export of animal feed[18]

Product category	Product code	Product label	India's exports to world (Value in USD million)		
			2022	2023	2024
230910 Dog or cat food, put up for retail sale	23091000	Dog or cat food, put up for retail sale	62.77	57.33	73.02
230990 Preparations of a kind used in animal feeding (excl. dog or cat food put up for retail sale)	23099090	Other preparations of animal feeding	181.05	183.80	216.29
	23099020	Concentrated for compound animal feed	34.16	33.41	36.15
	23099010	Compounded animal feed	33.43	35.63	43.92
	23099039	Other peeds of fish	3.15	3.04	4.89
	23099031	Prawn and shrimps feed	27.43	23.05	12.92
	23099032	Fish meal in powdered form	0.13	0.16	0.20

Table 4 India's import of animal feed[19]

Product Category	Product code	Product label	India's imports from the world (Value in USD million)		
			2022	2023	2024
230910 Dog or cat food, put up for retail sale	23091000	Dog or cat food, put up for retail sale	144.03	122.88	137.47
230990 Preparations of a kind used in animal feeding (excl. dog or cat food put up for retail sale)	23099090	Other preparations of animal feeding	328.10	305.13	334.16
	23099031	Prawn and shrimps feed	40.46	27.92	26.89
	23099020	Concentrated for compound animal feed	46.45	32.31	26.99
	23099039	Other peeds of fish	11.70	8.89	8.24
	23099010	Compounded animal feed	1.97	1.59	0.82
	23099032	Fish meal in powdered form	0.00	0.00	0.00

[18] ITC Trade Map
[19] ITC Trade Map

3.2 Market Segmentation:

- By Pet Type: Dogs dominate (85.6% share), driven by emotional bonding, health awareness, and rising urban adoption.
- By Product Type: Dry food leads with an 89.6% share in 2024 due to cost efficiency, shelf stability, and ease of storage.
- By Pricing: Mass products account for 70% of market share, popular for affordability and wide availability.
- By Ingredient: Animal-derived ingredients dominate (80%) due to high protein value and palatability.
- By Channel: Specialty stores lead with 50% share, offering expert guidance, curated selections, and trust among pet parents.[20]

3.3 Regional Market Dynamics:

- North India (35% market share) leads in pet adoption and retail density, with urban hubs like Delhi and Jaipur supporting demand.
- South India is gaining momentum, led by Bengaluru and Chennai.

3.4 Key Trends Shaping the Market:

3.4.1 Expansion of Organized Retail and E-Commerce Channels The wide availability of pet food through supermarkets, specialty stores, and online platforms is reshaping buying patterns. E-commerce offers convenience, pricing transparency, and subscription-based models, particularly appealing in urban settings. According to IBEF, India's e-commerce market is set to grow from US$ 125 billion in FY24 to US$ 345 billion by FY30 at a CAGR of 15%, significantly expanding access to pet food across cities and smaller towns.

Table 5 Retail Distribution Channels for Pet Food in India - Retail value sales in USD millions and Market Share (%)[21]

Outlet Type	2018		2023	
	Actual	Share	Actual	Share
Distribution Channel (Total)	245.4	100.0	629.6	100.0
Retail Channels	162.2	66.1	429.9	68.3
Retail Offline	151.3	61.7	338.4	53.7
Grocery Retailers	10.5	4.3	24.1	3.8
Hypermarkets	4.9	2.0	11.1	1.8
Supermarkets	3.4	1.4	8.5	1.4
Small Local Grocers	2.2	0.9	4.5	0.7
Non-Grocery Retailers	140.8	57.4	314.3	49.9
Home Products Specialists	140.4	57.2	312.0	49.6
Pet Shops and Superstores	140.4	57.2	312.0	49.6

[20] https://www.imarcgroup.com/india-pet-food-market

[21] Sector Trend Analysis – Pet food trends in India - agriculture.canada.ca

Outlet Type	2018		2023	
Health and Beauty Specialists	0.4	0.2	2.2	0.3
Retail E-Commerce	10.8	4.4	91.5	14.5
Non-retail channels	83.2	33.9	199.6	31.7
Veterinary clinics	83.2	33.9	199.6	31.7

3.4.2 Diversification Across Pet Categories The market is evolving beyond dogs to include cats, birds, fish, and other small animals. Allana's launch of **Purrfeto** cat food in 2025, targeting 30 Indian cities with a unique branding campaign, illustrates this trend. As housing trends shift and cat adoption grows, brands are customizing products for specific pet types and life stages.

3.4.3 Ethical Consumerism and Sustainability Preferences Pet parents are increasingly influenced by sustainability and cruelty-free values. Brands like **Paws for Greens**, launched in 2024 by Palak Jain, offer vegan dog food made from human-grade ingredients. This reflects a broader shift toward ethical, eco-conscious pet nutrition.[22]

3.5 Indian Pet food Market Projected Growth[23]

The pet food segment in India is dominated by international brands and a few fast-growing Indian brands.

Table 6 Key Players in the Industry[24]

Company Name	Description
Mars, Inc. (USA)	Global leader with dominant brands like Pedigree and Royal Canin in India.
Nestlé Purina	Major multinational offering premium pet food through Supercoat and Pro Plan.
Drools	One of India's largest pet food brands with extensive domestic production.
Himalaya Pet Nutrition	Integrates herbal formulations into pet wellness nutrition.
Choostix	Popular for its variety of pet treats and snacks for dogs.
Heads Up For Tails	Premium Indian brand with D2C and retail presence across urban centers.
Freshpet India	Offers fresh and clean-label pet food aligned with human-grade standards.
Petsutra/Petshop	Online-first platforms offering curated pet food selections and own labels.
Whiskas/Royal Canin	Mars brands popular in India, focused on species-specific cat nutrition.
Farmina Pet Foods	Premium European brand growing its presence in the Indian market.

[22] https://www.imarcgroup.com/india-pet-food-market
[23] ibid
[24] https://www.expertmarketresearch.com

Company Name	Description
Wiggles	Indian D2C pet care brand offering nutrition, grooming, and vet services

3.6 Processing Infrastructure and Manufacturing Clusters:

Pet food processing is concentrated in Maharashtra (Mumbai, Pune), Telangana (Hyderabad), and Tamil Nadu (Chennai). Key infrastructure includes:

- Extrusion plants (wet and dry)
- Freeze-drying facilities (for raw and functional diets)
- In-house labs for quality testing and formulation

Private labels and D2C startups often utilize contract manufacturing facilities located in Gujarat, Haryana, and Andhra Pradesh, supported by state MSME food parks or APEDA-certified exporters.

3.7 Technological and Innovation Trends:

- Cold extrusion and vacuum coating for nutrient retention
- Dual-flavor kibbles for taste enhancement
- Microencapsulation of probiotics and vitamins
- Data-driven nutrition formulation (AI-based diet plans)[25]

[25] https://www.imarcgroup.com/india-pet-food-market

4. Investment Opportunities in Pet Food Sector of India

4.1 Emerging Opportunities in Product Diversification:

Investors can explore a variety of product segments beyond traditional dry kibble or wet food:

- Customized and Breed-Specific Diets: Different breeds have varying dietary needs. Offering targeted nutrition enhances brand credibility and caters to premium consumers.
- Functional Foods: Products fortified with probiotics, joint-care supplements, omega fatty acids, etc., appeal to health-conscious pet owners.
- Natural and Organic Foods: Globally, the trend toward chemical-free, additive-free, and grain-free diets is growing and India is catching up, especially in urban centers.
- Pet Treats and Snacks: A fast-growing sub-category, ideal for reward-based training and emotional bonding.
- Exotic and Other Pets: There is also demand for processed food for cats, birds, fish, and small animals, which remains under-served.

4.2 Scope for Localized Manufacturing and Sourcing

India currently imports a large portion of premium pet food, which increases costs and limits accessibility. There is substantial opportunity to establish domestic manufacturing units with localized raw materials like poultry, fish, vegetables, and millets. Using indigenous ingredients not only reduces production costs but also allows development of culturally relevant, digestible formulations suitable for Indian pets and climate.

4.3 Online Retail and Direct-to-Consumer (D2C)

One of the biggest enablers for new entrants in the pet food space is the rise of online retail and D2C platforms. Pet care e-commerce is growing faster than physical retail due to convenience, better product information, and home delivery. Successful D2C pet food brands are leveraging:

- Subscription models for regular deliveries
- Customized meal plans based on pet type and lifestyle
- Social media marketing and influencer partnerships
- Mobile apps to track feeding, order history, and veterinary support

5.Government Intervention and Support

The Government of India has implemented various initiatives to support and boost pet food, animal feed/fodder & aquafeed sector in India.

5.1. Pradhan Mantri Kisan Sampada Yojana (PMKSY)[26]:

PMKSY is a comprehensive scheme launched by the Ministry of Food Processing Industries (MoFPI) aimed at creating modern infrastructure with efficient supply chain management from the farm gate to the retail outlet. The key objectives of PMKSY include:

- Creation of modern infrastructure for food processing, including mega food parks, clusters, and individual units.
- Establishment of effective backward and forward linkages, connecting farmers, processors, and markets.
- Building robust supply chain infrastructure for perishable goods.

The PMKSY had seven component schemes viz; (i) Mega Food Parks, (ii) Integrated Cold Chain and Value Addition Infrastructure, (iii) Infrastructure for Agro-Processing Clusters, (iv) Creation of Backward and Forward Linkages (discontinued), (v) Creation/Expansion of Food Processing & Preservation Capacities, (vi) Food Safety and Quality Assurance Infrastructure and (vii) Human Resources and Institutions. The component schemes of Mega Food Park, Creation of Backward & Forward Linkages, Human Resource & Institution - Promotional Activities, Skill Development & HACCP, a component of Food Safety and Quality Assurance Infrastructure have been discontinued.

5.2. PM Formalization of Micro Food Processing Enterprises (PMFME):

The PMFME scheme is a centrally sponsored initiative with an outlay of Rs10,000 crore, which is being implemented over five years from 2020–21 to 2024–25. The scheme provides financial, technical, and business support to existing micro food processing enterprises, aiming to formalize the sector and enhance its competitiveness[27]. The programme has four broad components addressing the needs of the sector: i) Support to individual and groups of micro enterprises; ii) Branding and Marketing support; iii) Support for strengthening of institutions; iv) Setting up robust project management framework.

5.3. Production Linked Incentive Scheme for Food Processing Industry (PLISFPI):

The Production Linked Incentive Scheme for Food Processing Industry has been formulated based on the Production Linked incentive scheme of NITI Aayog under “AatmaNirbhar Bharat Abhiyaan for Enhancing India's Manufacturing Capabilities and Enhancing Exports”. The Government of India has approved the Production Linked Incentive Scheme (PLIS) for the Food Processing Industry, including processed fruits and vegetables. The primary aim of the scheme is to create global processing champions in India by improving the competitive strength of Indian companies in terms of output, value addition, and market linkages.

The scheme has an outlay of Rs10,900 crore to be implemented from 2021–22 to 2026–27[28].

- The first component relates to incentivising manufacturing of four major food product segments viz. Ready to Cook/ Ready to Eat (RTC/ RTE) foods including Millets based products, Processed Fruits & Vegetables, Marine Products, Mozzarella Cheese.
- The second component relates to support for branding and marketing abroad to incentivise emergence of strong Indian brands.

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[26] https://sampada-mofpi.gov.in/

[27] PM Formalization of Micro Food Processing Enterprises (PMFME) Scheme. Available at: https://pmfme.mofpi.gov.in/pmfme/#/Home-Page

[28] Production Linked Incentive Scheme for Food Processing Industry (PLIS). Ministry of Food Processing Industries. Available at: https://mofpi.nic.in.

6. R&D and Skill Development Ecosystem

Research and development initiatives and availability of skilled workforce serves as the foundation of a of a thriving and competitive feed and fodder sector. Across India, numerous universities, centres of excellence, technical institutes, and other institutions play pivotal roles in advancing the feed and fodder industry. These entities facilitate the adoption of cutting-edge processing technologies, promote the registration of intellectual property rights for processes and products, and foster skill development among professionals in the field. Below are some key institutions contributing to India's robust R&D ecosystem in the animal nutrition, forage crops, and feed technology sector:

Table 7: Key Institutions and Highlights

Institutions	Highlights
National Institute of Food Technology Entrepreneurship and Management (NIFTEM-Kundli & Thanjavur)	• Conducts research on processing technologies, pet food formulation, packaging innovations; offers pilot testing facilities.
ICAR–Indian Grassland and Fodder Research Institute (IGFRI)	• Premier institute for forage R&D under ICAR • Developed 300+ improved varieties of grasses, legumes, and fodder cereals. • Focus on high-yielding Napier hybrids, multi-cut sorghum/bajra, disease-resistant oats, and QPM. • Works on climate-resilient fodder and seed systems.
All-India Coordinated Research Project (AICRP) on Forage Crops & Utilization	• Coordinates national varietal trials and regional adaptability studies. • Collaborates with IGFRI for high-biomass and high-nutrition fodder crops. • Supports seed production and region-specific crop packages.
National Dairy Development Board (NDDB)	• Innovated Urea-Molasses-Mineral Blocks (UMMB) and Total Mixed Ration (TMR). • Developed ration balancing software and densified feed block technology. • Promotes efficient utilization of crop residues.
Department of Biotechnology (DBT) & Department of Science & Technology (DST)	• Fund R&D in microalgae-based feed, BSF insect protein, and biotechnological feed solutions. • Support innovation in methane-reducing additives.
Private Sector & Startups[29]	• Offer hydroponic fodder units, herbal supplements, and precision nutrition tools. • Innovate in insect protein, residue-based feed, and AI-driven feeding systems.

[29] https://www.amoghvarta.com

Institutions	Highlights
Agriculture Skill Council of India (ASCI)	• Develops training modules for feed mill operators, dairy technicians, and animal nutrition assistants. • Certifies programs under NSDC framework.
NDRI Karnal, IVRI Izzatnagar, Central Feed Technology Institute	• Provide diplomas and certifications in animal nutrition, feed processing, and quality control. • Offer hands-on technical training.
Public–Private Training Programs	• Train fodder entrepreneurs in silage making, feed processing, and marketing. • Supported by National Livestock Mission (NLM) and similar schemes.

Conclusion

India is well-positioned to emerge as a global leader in the pet food industry. Owing to the rapidly expanding pet population, increasing urbanization, and growing awareness around pet health and nutrition, the pet food sector is witnessing substantial growth and advancement. The industry is being further propelled by premiumization trends, convenience-based product offerings, and the growing popularity of e-commerce and subscription-based delivery models. With a consumer base that is becoming increasingly discerning and willing to invest in high-quality, functional, and sustainable products, the market is maturing rapidly.

Supportive government policies have created a conducive environment for growth. Although there are no pet food-specific schemes at present, broader initiatives under the Ministry of Food Processing Industries (MoFPI)—including the PMKSY, PMFME, and Agriculture Infrastructure Fund (AIF)—are contributing significantly to infrastructural improvements and entrepreneurial growth in the sector. These schemes have encouraged backward integration, value addition, and the development of post-harvest logistics that are essential for pet food manufacturing. India's R&D and academic ecosystem is also aligning itself with the needs of the pet food sector. Premier institutions such as NIFTEM, ICAR, and CSIR-affiliated research bodies are focusing on species-specific formulations, food safety standards, packaging innovation, and shelf-life enhancement.

From a regulatory standpoint, evolving frameworks led by the Food Safety and Standards Authority of India (FSSAI) are critical to ensuring consumer confidence and standardizing quality benchmarks. With greater alignment to international norms such as AAFCO and FEDIAF, India can strengthen its competitiveness in export markets. The sector is already witnessing an influx of international brands and the rise of Indian startups innovating in natural, vegan, and personalized nutrition categories.

Digital retail is another growth driver, with online platforms expanding market reach to Tier 2 and Tier 3 cities. Organized retail and pet specialty stores are simultaneously reshaping the consumer journey, making it easier for pet parents to access quality products and make informed decisions. Marketing campaigns focused on pet humanization, nutritional transparency, and ethical sourcing are helping establish stronger brand loyalty.

With continued policy support, technological upgrades, and enhanced consumer education, the Indian pet food industry can become a major contributor to economic growth, employment, and animal welfare. The sector has the potential not only to meet domestic demand but also to emerge as a competitive exporter of premium, scientifically formulated pet food. Through coordinated efforts by government bodies, research institutions, and private players, India can fully leverage its demographic and infrastructural advantages to secure a leading position in the global pet food landscape.

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