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Report Highlights:

China's pet industry reached \$43.4 billion in 2025, largely driven by the growth in per-pet spending and reflecting a shift from volume-driven to value-driven expansion. Younger consumers are shaping market trends with higher expectations for functionality, nutrition, and digital engagement, while online channels continue to support growth for both domestic and imported products. Offline retail remains resilient in core cities. Meanwhile, niche and exotic pets are becoming increasingly popular, highlighting the diversity of pet ownership and specialized consumption needs.

China's Pet Market Overview

In 2025, China's pet industry emerged as one of the few sectors in China to grow despite a broader consumption slowdown. While overall consumer spending faced pressure due to economic uncertainty and cautious household budgets, spending on pets continued to rise, highlighting the industry's strong resilience and counter-cyclical potential. This growth is driven by diverse segments, including pet food, supplies, healthcare, grooming, and specialty services, reflecting both essential and emotionally driven demand. China's pet market represents a relatively stable and high-potential track within the consumer sector, offering opportunities even in a challenging macroeconomic environment.

1. *Market Growth Slows but Value Growth Continues*

China's urban dog and cat market reached approximately \$43.4 billion (RMB 312.6 billion) in 2025, up 4.1 percent year-on-year. While pet population growth slowed to below 2 percent, rising per-pet spending sustained overall market expansion, signaling a shift from volume-driven to value-driven growth.¹ Tier-one and pet-friendly urban centers such as Beijing, Shanghai, Chengdu, and Guangzhou show stronger engagement and faster premiumization, while lower-tier markets remain more price-sensitive.

2. *Cats Outpace Dogs in Both Population and Spending*

In 2025, the urban pet population in China reached 126 million, up 2.21 million from 2024, representing a 1.8 percent increase. Pet dogs numbered 53.43 million, a modest rise of 0.85 million (up 1.6 percent), while pet cats reached 72.89 million, increasing by 1.36 million (up 1.9 percent). Annual spending per dog averaged \$418 (RMB 3,006), up 1.5 percent from 2024, whereas annual spending per cat was \$290 (RMB 2,085), marking a 3.2 percent increase. Cats remained the faster-growing segment, with a higher rate of population, total expenditure, and per-pet spending growth. This highlights the ongoing expansion of the cat economy driven by urban lifestyle changes and evolving consumer preferences.²

3. *Pet Healthcare Becomes More Targeted and Cost-Conscious*

Pet medical spending showed signs of moderation in preventive care, even as diagnostic visits increased. Owners demonstrated more rational healthcare decision-making, prioritizing treatment effectiveness and value over routine frequency.

4. *Younger Consumers Shape Market Direction*

Consumers born in the 1990s remained the core pet-owning group, while consumers born in the 2000s expanded rapidly. These cohorts showed stronger brand awareness, higher expectations for product functionality, and greater reliance on digital platforms for information and purchasing. This trend is particularly evident in emerging urban markets in Southwest China, such as Chengdu and Chongqing, where emotionally driven consumption fuels demand for interactive, experiential, and premium pet products

^{1,2} Date source: 2026 China Pet Industry White Paper

5. *Evolving Online Channel Dynamics*

The online pet retail landscape in China is undergoing significant shifts, with different platforms exhibiting distinct growth patterns. Tmall and JD.com show stable and steady performance, with their core value focused on fostering brand loyalty and repeat purchases. In contrast, Douyin (TikTok), focused on video content, experienced rapid growth driven by impulse buying, though with greater volatility. This divergence highlights the importance for brands to tailor their online strategies: leveraging established e-commerce platforms for consistent revenue while utilizing social media channels to capture fast-moving, trend-driven demand.

6. *Offline Pet Retail Shows Resilience*

As of September 2025, China had a total of 94,891 pet stores, showing a slight contraction with a net decrease of 1,270 stores compared to the beginning of the year.³ Despite a nationwide decline in total pet store numbers, core cities such as Shanghai, Chengdu, Hangzhou, and Beijing demonstrated more resilience thanks to their core competitive advantage of service offerings, which generate higher revenue than product sales alone. Services such as grooming and bathing are difficult to replicate online, underscoring the lasting value of physical retail.

7. *Exotic Pets Go Mainstream*

In 2025, ownership of exotic pets continues to rise, reflecting a growing preference among younger consumers. Aquatic pet ownership reached 17.3 percent of all pet owners (increased by 3.9 percentage), followed by reptiles at 13.5 percent (increased by 2.4 percentage), birds at 8.7 percent (increased by 0.9 percentage), and rodents at 7.6 percent (increased by 0.8 percentage). Within these categories, turtles, snakes, and geckos dominate the reptile segment (57.8, 50.4, and 49.8 percent respectively), while golden hamsters and fancy mice lead among rodents (32.1 and 21.5 percent). Parrots account for 60.1 percent of bird ownership, and cold-water freshwater species make up 69.1 percent of aquarium pets. Consumption patterns emphasize food and supplies, with rodents and reptiles particularly reliant on nutrition (92.1 and 93.5 percent), while birds show higher demand for medicines, representing 41.4 percent of their market. These trends highlight the growing diversity of pet ownership and the specialized needs of niche animals compared to cats and dogs.⁴ Regionally, South China has become a key hub for exotic and aquatic pet development, particularly in cities such as Guangzhou and Shenzhen, where both domestic consumption and export-oriented production are expanding. This has further driven demand for specialized nutrition, including high-protein, functional, and fresh pet food formats.

China's Pet Food Consumption Overview

In 2025, pet food segment in China continued to dominate overall pet consumption, accounting for 53.7 percent of total spending, with staple food, treats, and nutritional products all edging up year-on-year. Within this category, consumption is upgrading, fresh food is gaining traction, functional attributes are

³ Date source: The 7th China Pet Retail Conference

⁴ Data source: 2025 China Exotic Conference

becoming essential, and pet owners increasingly prioritize ingredient quality and transparency, favoring poultry and high-quality protein. Interactive and function-oriented products are driving growth, particularly among dog owners, underscoring the rapid rise of functional pet nutrition as a key structural trend.

1. *Fresh, Wet, and Functional Foods Gain Momentum*

In 2025, consumer preferences continued to shift toward premium pet food formats, including fresh, freeze-dried, baked, air-dried, and wet staple formulations. Adoption was driven by perceived benefits such as enhanced nutrition, improved digestibility, and higher palatability, particularly among younger, urban pet owners. Among dog owners, demand rose across freeze-dried, baked, fresh, and wet staple diets, with fresh food and wet staple food showing the most pronounced growth. Cat owners also demonstrated increased interest in baked, freeze-dried, fresh, and air-dried products, with baked diets and fresh food emerging as the fastest-growing segments.

Chart 1: Dog owners' staple food purchase categories (percentage of dog owners)⁵

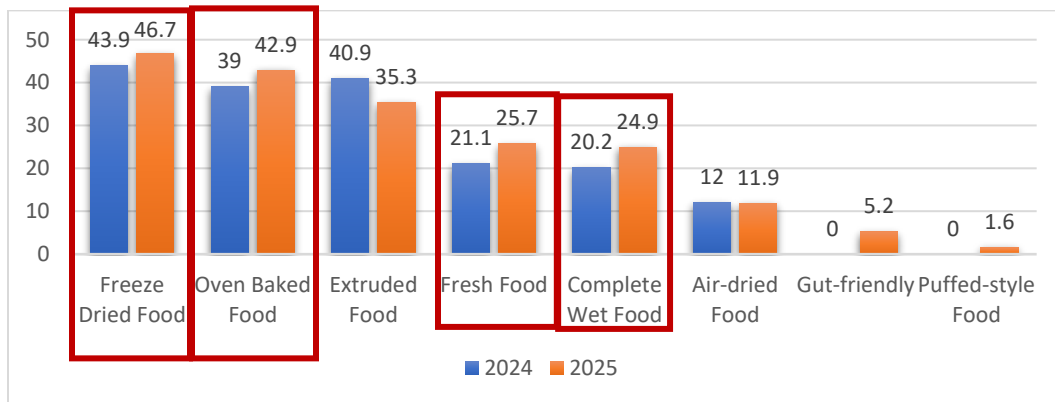
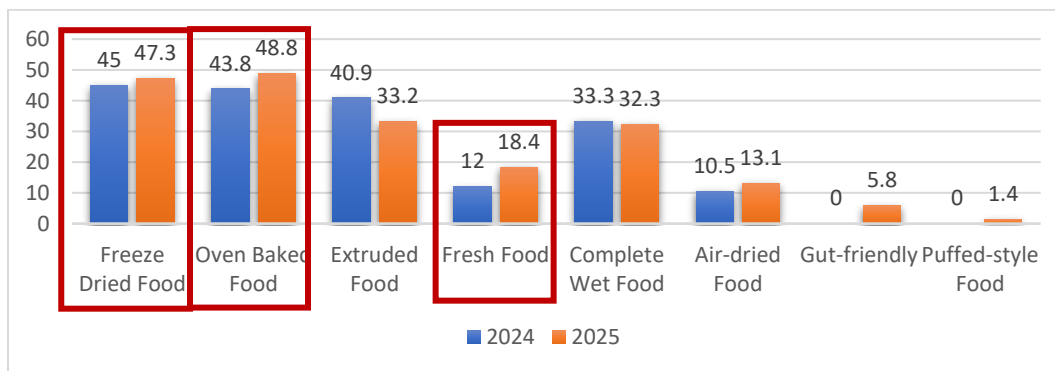


Chart 2: Cat owners' staple food purchase categories (percentage of cat owners)⁶



^{5,6} Data source: Petdata.cn and 2026 China Pet Industry White Paper

2. *Segmented Market Dynamics*

China's pet food market is increasingly segmented by price. Foreign brands continue to dominate the premium segment, typically priced at above \$16.70 per kg (RMB 60 per jin), with imported brands appealing to high-income, urban pet owners who prioritize ingredient quality and brand reputation. In contrast, the mid-priced segment, ranging from \$4.20 to \$8.30 per kg (RMB 15–30 per jin), and the low-priced segment, below \$4.20 per kg (below RMB 15 per jin), are largely led by domestic brands.⁷ These local players compete through cost efficiency, localized formulations, and strong distribution networks, while imported brands face increasing cost pressures and margin constraints in these more price-sensitive tiers.

3. *Rising Import Costs*

Starting January 1, 2025, China raised the import tariff on retail-packed pet food, including dog and cat food, from 4 to 10 percent under the Most-Favored-Nation (MFN) provisional tariff rate, applying to all countries of origin.⁸ Although the higher tariff had not been fully passed through to retail prices in late 2025, it increased cost pressure on imported pet food, compounded by logistics costs and currency fluctuations. Industry observers note that this shift is likely to compress margins for imported products, particularly in the mid-priced segment, prompting some price-sensitive consumers to turn to domestic alternatives and creating additional opportunities for Chinese brands to gain market share in categories where imports traditionally held an advantage.

4. *E-Commerce as a Growth Engine for Domestic Brands*

Domestic brands achieved significant traction online, particularly on platforms such as Tmall, JD.com, and Douyin through livestreaming, influencer endorsements, and flash sales. Local brands often outperform imported products in mid-tier categories. The agility of domestic brands in digital marketing and rapid fulfillment gives them a competitive advantage, especially among younger and urban pet owners.

5. *Ingredient Transparency and Changing Consumer Preferences*

Chinese pet owners are increasingly prioritizing product functionality, nutrition, and overall value over the country of origin. They show a growing preference for transparent ingredients, clearly identified protein sources, and scientifically formulated diets. Poultry-based proteins are gaining favor over red meat and seafood, accompanied by rising interest in high-protein content and functional ingredient inclusion.

6. *Polarized Competition*

China's pet food market is sharply polarized. High-end imported products maintain steady demand from affluent pet owners, while low-end budget products compete aggressively on price. Mid-market offerings face challenges from both ends, requiring brands to innovate or differentiate to survive.

⁷ Industry data collected by ATO Shanghai

⁸ Data source: [Announcement No. 12 of 2024](#) of the Customs Tariff Commission of the State Council

Although domestic alternatives are accelerating, the high-end segment remains dominated by overseas brands, which account for approximately 75 percent of the premium market, compared with only 25 percent for domestic high-end brands. Domestic players primarily focus on mid- to low-end segments, with weaker brand premium power and single-product prices that are 30 to 50 percent lower than international counterparts. Data suggests that the premium segment accounts for roughly 30 percent of total market value and continues to grow faster than the overall market. In contrast, the low-end segment remains highly price-competitive, while the mid-tier is increasingly squeezed between trading-up consumers and value-seeking buyers.⁹

7. Innovation and Differentiation

To compete, domestic brands are increasingly investing in local research and development, developing functional ingredients, premium recipes, and specialty pet snacks. Brands are also leveraging digital campaigns and interactive products to enhance customer engagement. Functional foods, interactive treats, and fresh offerings are emerging as key drivers for domestic brand growth, allowing them to challenge imported products in both quality perception and consumer experience.

Photos: Fresh, functional, poultry-based domestic pet foods at the 27th Pet Fair Asia



U.S. Pet Food in China

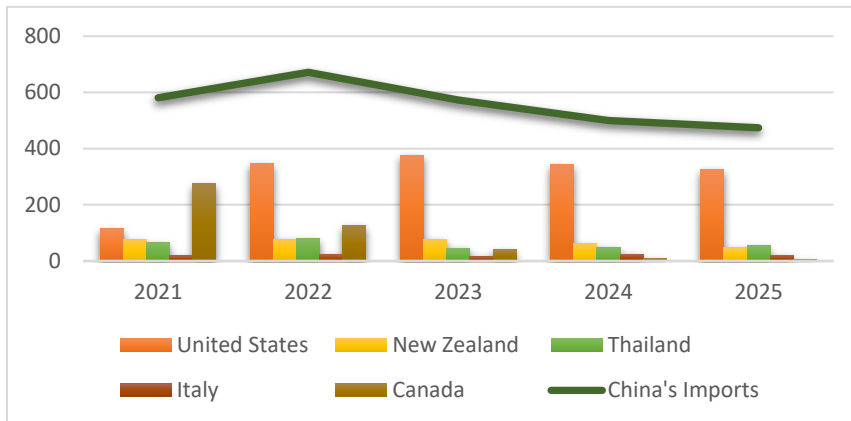
1. Packaged Pet Food Import Data Updates

According to China Customs, imported packaged pet food totaled \$474.1 million in 2025, down 5.2 percent from 2024. This decline reflects the impact of tariff adjustments, growing domestic competition, and import restrictions due to avian influenza, with key sources such as New Zealand and Canada experiencing drops of 22.9 and 24 percent, respectively.

The United States remains the largest exporter to China market. According to U.S. Census Bureau Trade Data, the United States exported \$ 244.7 million of U.S. pet food under H.S. code 2309.10 (dog and cat food for retail sale) during 2025. This reflects a 17 percent decrease from 2024 which was a record year.

⁹ Data Source: Guohai Securities Research Report

Chart 3: China imports from top exporters during 2021-2025 (million dollars)¹⁰



In 2025, Ministry of Agriculture and Rural Affairs of the People’s Republic of China (MARA) approved a total 182 SKUs of imported U.S. pet (dog/cat) foods by issuances of notices, accounting for 43 percent of total approval.

2. Opportunities for U.S. Ingredients in China’s Pet Food Supply Chain

Despite the growth of packaged pet food, U.S.-sourced raw materials, such as chicken meal, plasma, and other functional proteins, continue to play a crucial role in China’s pet food industry. These ingredients are highly valued for their consistent quality, nutritional profile, and functional benefits, making them preferred choices for domestic formulators, particularly in high-protein and functional pet foods. Even with rising domestic competition and increased tariffs on finished imported products, U.S. raw materials remain widely used, helping manufacturers maintain premium formulations that align with evolving consumer expectations for ingredient transparency, protein source clarity, and scientifically supported nutrition.

In 2025, the Chinese market imported 169,857 metric tons of U.S. non-ruminant protein meals through major ports¹¹. Although the total value of these imports decreased by \$139 million due in 2025, China continued to be one of the largest markets for U.S. rendered proteins, absorbing about 10 percent of total U.S. poultry meal production (1.83 million metric tons). Pet food grade poultry meals remain highly sought after, reflecting strong demand for high-quality protein sources in formulations. The United States continues to dominate this segment, holding nearly all of the market for non-ruminant protein meals. Consumer insights further highlight the importance of these U.S. raw materials. For instance, surveys and observations conducted at the USA pavilion during the 2025 Pet Fair Asia indicated that cat owners show strong acceptance of U.S. poultry by-product meal in premium and super-premium dry cat foods, with formulations supporting protein inclusion rates up to 28 percent.

¹⁰ Data source: General Administration of Customs of the People’s Republic of China

¹¹ Data are compiled and calculated by the North American Renderers Association (NARA) based on different product categories.

In addition to animal-based inputs, a range of U.S. plant-derived ingredients such as dry peas, rice bran, sorghum, and corn are recognized for their nutritional value and functional roles in pet food formulations. These components contribute carbohydrates, fiber, and complementary protein fractions that support balanced diets, digestive health, and overall palatability, and are increasingly featured in both traditional kibble and alternative product formats. The promotion and education around these grains have helped broaden formulators' options and reinforced consumer perceptions of diet quality.

Overall, these trends underscore that ingredient quality, safety, and functionality are key factors shaping Chinese pet owners' preferences and guiding domestic formulation strategies.

3. *Pet Food Regulatory Updates*

In 2025, China issued two draft national standards for pet foods and notified them to the World Trade Organization (WTO).

- 1) On August 11, 2025, MARA announced a new draft national hygienic standard for pet feed (food) soliciting public comments. On September 5, 2025, China notified the National Standard for Hygiene Requirements for Pet Foods to the WTO under G/TBT/N/CHN/2111. The new draft standard stipulated requirements for raw materials used during the production processes, and maximum levels of limits and testing methods for contaminants, mycotoxins, and natural plant toxins in pet foods. At the time of the report, the draft standard was not finalized. Please see USDA GAIN Report [CH2025-0176](#) for more detailed information about the draft standard.
- 2) On August 11, 2025, MARA announced the draft new mandatory national standard for Pet Food Labeling soliciting public comments until October 10, 2025. On September 5, 2025, China notified the draft standard for pet food labels to the WTO under G/TBT/N/CHN/2112. This new draft standard specified the principles, content claims requirements, and composition of information on the labels for pet foods. The mandatory standard applies to pet compound feed or complete pet food, pet feed additive premix, complementary pet food, pet supplement, and other pet food or pet treats, produced or sold in China. At the time of the report, the standard was not finalized. Please see USDA GAIN Report [CH2025-0169](#) for more detailed requirements of pet food labels.

4. *Import Tariff*

Effective January 1, 2025, China adjusted its import tariff regime for pet food, raising the Most-Favored-Nation (MFN) tariff rate on imported pet food products from 4 percent to 10 percent under the revised tariff schedule published at the end of 2024. This change applies to retail packaged dog and cat food (HS codes 23091010 and 23091090) and reflects broader tariff adjustments announced by the State Council Tariff Commission. The MFN tariff change is separate from, and in addition to, retaliatory tariffs on U.S. agricultural products implemented earlier in 2025. For more details, please refer to below guidance on China's retaliatory tariffs and tariff exclusion process for U.S. products.

Report Link: [China: China Reduces Tariff Rates on US Agricultural Products](#)

5. *Pet Fair Asia 2025*

The inaugural USA Pavilion at Pet Fair Asia 2025, generated \$6 million in projected sales and demonstrated strong market interest. Additional details are available in the USDA GAIN Report [USA Pavilion at Pet Fair Asia 2025 Generates 6 Million USD](#) or via ATO Shanghai at ATOShanghai@usda.gov.



Recommended Trade Shows:

*Dates are accurate at publishing, but subject to change

Pet Fair Asia (www.petfairasia.com/en/)

- Pet Fair Beijing, March 19 to 22, 2026
- Shanghai, August 19-23, 2026
- Pet Fair South China (Shenzhen), December 11-13, 2026

The One Pet Show (TOPS)

- Shanghai, May 7-10, 2026
- Chengdu, September 10-13, 2026

Global Pet Expo (<https://www.globalpetexpo.org/>)

- Orlando, Florida, March 25-27, 2026

SuperZoo (<https://www.superzoo.org/>)

- Las Vegas, August 12-14, 2026

* SuperZoo and Global Pet Expo are often attended by Chinese buyers.

Helpful Reports and Resources:

General Administration of Customs of the People's Republic of China [Quarantine Registration List of Overseas Animals and Plants and Relevant Products](#)

Related USDA GAIN Reports:

- [China: Overview of Feed and Feed Additives and Pet Food Regulations for Export to the PRC | CH2024-0039](#) (dated April 2, 2024)
- [China: Northeast China Pet Food Market Brief | CH2024-0114](#) (dated September 27, 2024)
- [China: Pet Food Market Update 2024 | CH2024-0162](#) (dated December 10, 2024)
- [China: Pet Food Market Update 2025](#) (dated May 16, 2025)
- [China: USA Pavilion at Pet Fair Asia 2025 Generates 6 million USD](#) (dated December 03, 2025)

Attachments:

No Attachments.