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Report Name: Vietnam Pet Food Market

Country: Vietnam

Post: Ho Chi Minh City

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Report Highlights:

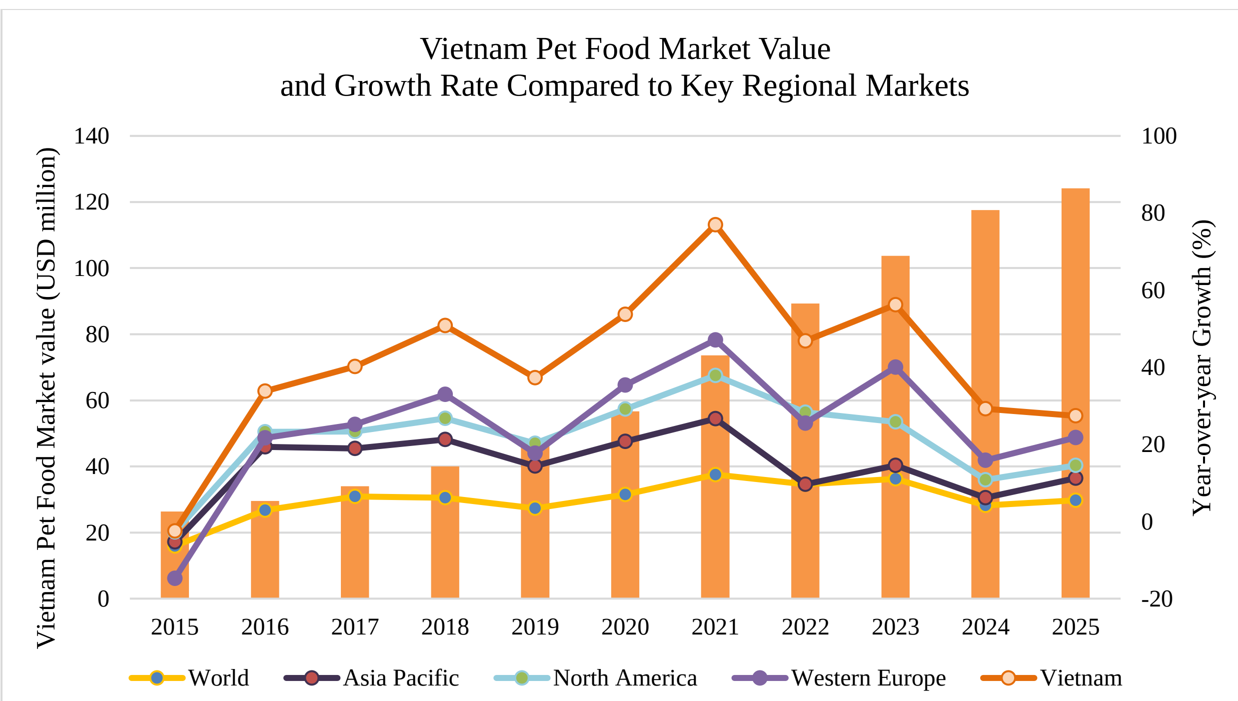
Vietnam's pet food market ranked among the fastest growing in the world, reaching $124 million in 2025 due to growth in pet ownership and increased spending on pets. Pet food imports totaled $66 million in 2025. However, the United States remains a minor supplier in the market, leaving room for growth.

1. Market Overview

According to Euromonitor International, Vietnam's pet food[1] market reached $124 million in 2025, growing 71 percent over the past five years, and ranking among the fastest-growing markets in the world (See Chart 1). This impressive growth is driven by rising incomes, modern lifestyles, and a significant shift in Vietnamese pet owner behavior. Improved disposable income and increasingly busy urban lifestyles have led many Vietnamese — particularly younger generations — to choose pets for companionship and mental health support. As of 2026, Vietnam is home to approximately 14 million dogs and cats, up 26 percent compared to five years ago. Vietnamese pet owners increasingly see their animals as companions or family members rather than household guards against thieves or mice.

This evolving mindset is reshaping purchasing behavior, with owners allocating greater budgets toward nutritious pet food rather than repurposing human food for their animals. Spending on pet treats, health supplements, and pet care services has also risen considerably. The proliferation of dedicated pet stores, veterinary clinics, and e-commerce platforms has further improved access to premium pet products and care across Vietnam.

Chart 1: Vietnam Pet Food Market Value and Growth Rate Compared to Key Regional Markets (2015–2025)



[1] *For the purposes of this report, pet food refers to dog and cat food classified under HS Code 230910 (Dog or cat food, put up for retail sale)*

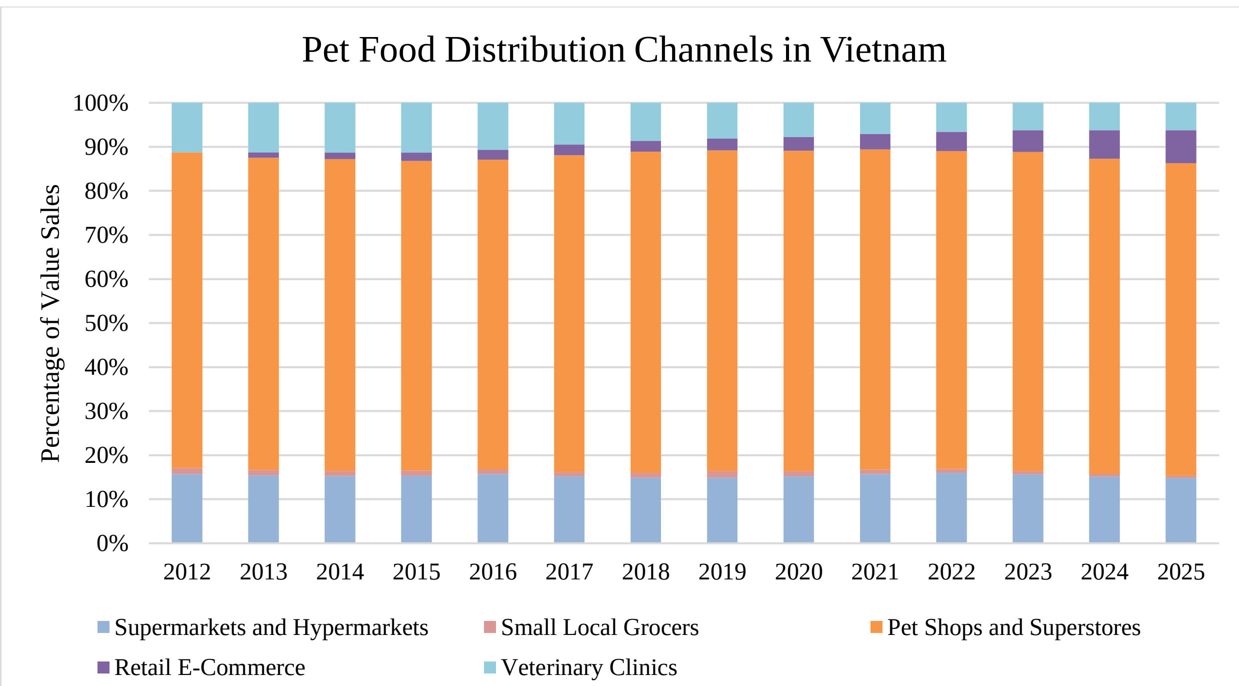
Source: Euromonitor International

2. Distribution channels:

In Vietnam, pet food is mainly sold through pet shops and superstores, which accounted for over 70 percent of total pet food sales in 2025. Pet owners favor this channel because it serves as a one-stop destination for all their pet needs — from wet and dry food, treats, and supplements to shampoo, litter, toys, and other pet care devices. Supermarkets and hypermarkets make up the next most popular channel, holding a steady share of 15 percent in 2025. These outlets appeal to pet owners who prefer to pick up pet food alongside their regular grocery shopping, making them a reliable secondary option.

Retail e-commerce, while still accounting for a relatively small share of 7.5 percent of value sales in 2025, has been the fastest-growing channel over the past decade. This growth mirrors the broader rise of e-commerce across Vietnam. Many pet shops, supermarkets, and hypermarkets have also launched their online stores, further expanding this channel's reach and accessibility. Finally, veterinary clinics, although still a smaller channel, hold strong potential — particularly for functional or treatment-specific pet foods. Pet owners tend to trust veterinarians' recommendations, making clinics a credible and influential point of sale for specialized nutrition products.

Chart 2: Pet Food Distribution Channels in Vietnam



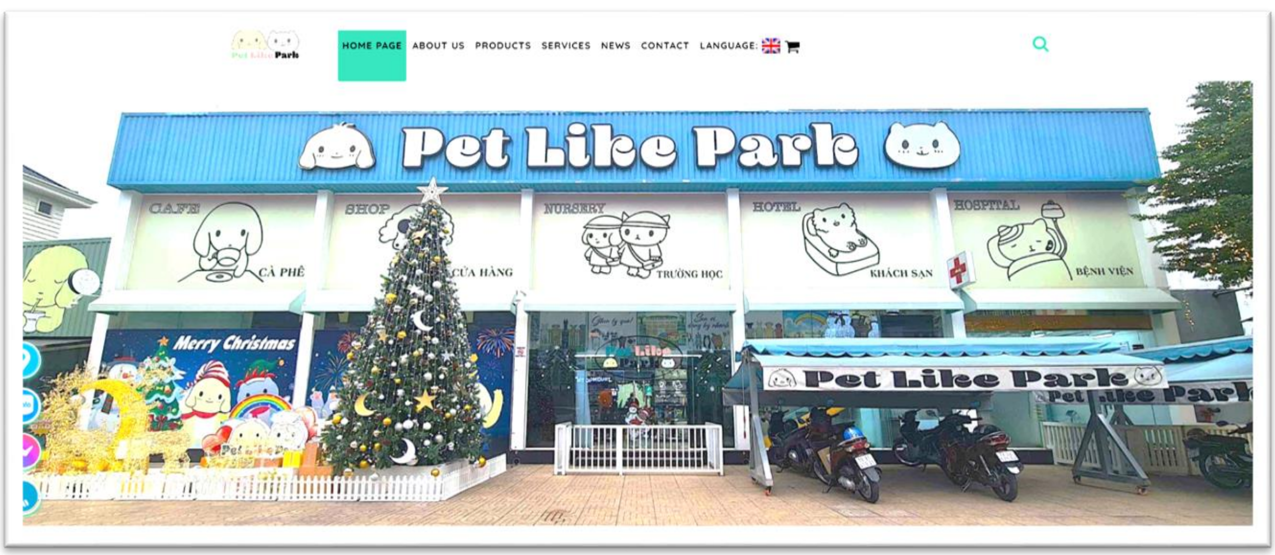
Source: Euromonitor International

3. Pet Food Production in Vietnam

Vietnam has long established itself as a leading pet food manufacturing hub in the region. Most of the world's major pet food companies have set up operations or opened factories in the country, using it as a base to export products globally. Key factors driving this investment include competitive labor costs, readily available local ingredients, and a government framework that actively supports foreign investment. As domestic demand for pet food has grown significantly, manufacturers have begun shifting their focus toward the local market. Today, a growing number of investors are opening factories in Vietnam specifically to serve Vietnamese consumers, offering pet owners a wider range of product choices.

This growth in local pet food production has created significant opportunities for U.S. pet food ingredients — particularly products that local sources cannot supply in sufficient quantities, such as corn, soybeans, dairy protein, meat bone meal, and other nutritional supplements.

Photo 1: Pet Like Park — a one-stop pet superstore offering a full range of services, including a supermarket, hotel, clinic, spa, playground, swimming pool, and kindergarten. In 2026, Pet Like Park also inaugurated the first high-end, international-standard pet food production factory in Ho Chi Minh City.

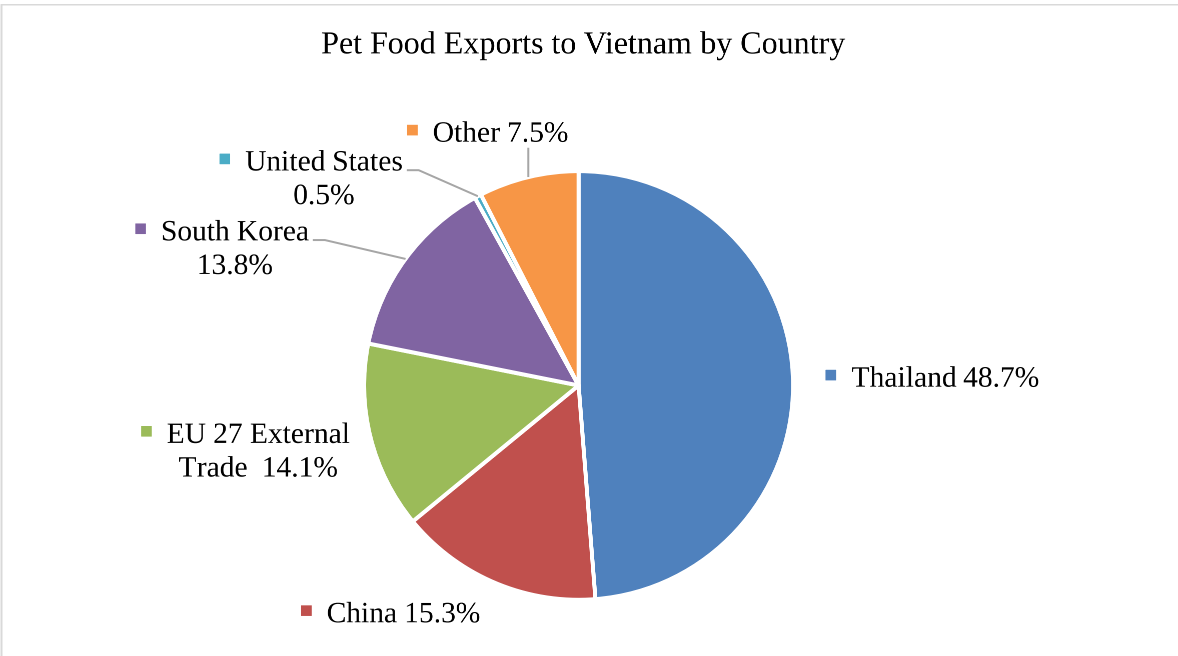


Source: PetLike Park website.

4. Pet Food Exports to Vietnam

Despite being a regional manufacturing hub for pet food, Vietnam also imports a significant volume of pet food from around the world to meet growing domestic demand for high-quality products. In 2025, Vietnam imported $66 million of pet food from global suppliers. Thailand is the largest supplier, accounting for 49 percent market share, benefiting from its geographic proximity to Vietnam and preferential zero-tariff access under Association of Southeast Asian Nations (ASEAN) trade agreements. Most major pet food manufacturers — including Charoen Pokphand Group (CP Group) and Mars Inc. — have factories in Thailand and export their products across ASEAN markets. China ranks second with 15 percent market share, followed by the European Union (EU) and South Korea. All of these trading partners export pet food products to Vietnam duty-free. The United States held only 0.5 percent market share, leaving significant room for growth for U.S. pet food exporters seeking to expand into the Vietnamese market.

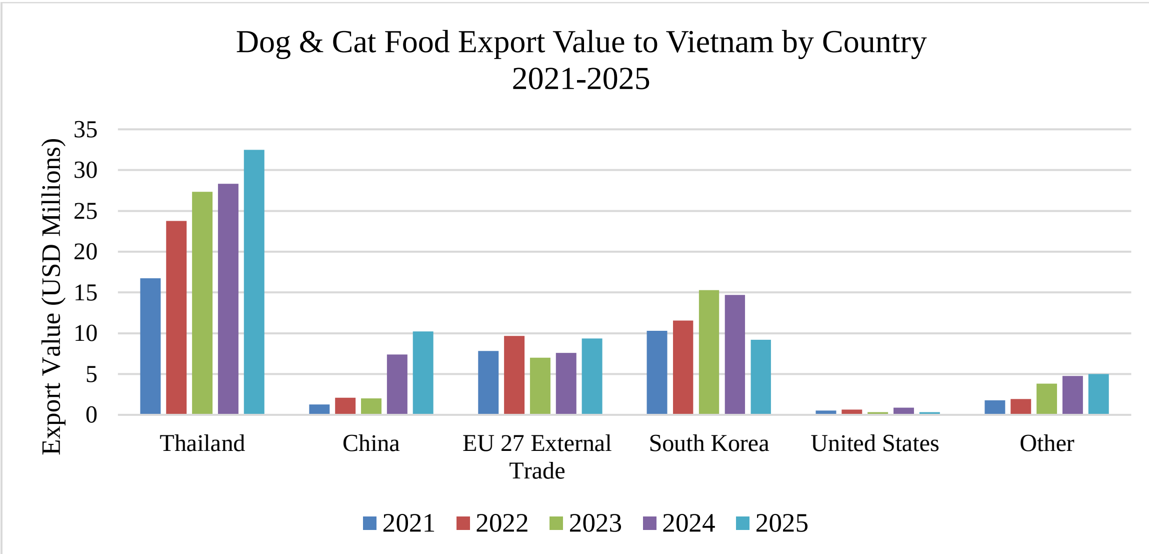
Chart 3: Pet Food Exports to Vietnam by Country



Source: Trade Data Monitor LLC.

From 2021 to 2025, most major pet food export markets to Vietnam experienced steady growth, driven by rising domestic market demand for foreign products. Thailand maintained its position as market leader, with exports to Vietnam nearly doubling from $17 million in 2021 to $33 million in 2025. China emerged as the second-largest exporter of pet food to Vietnam, with export values surging from $1.3 million in 2021 to $10.2 million in 2025. This figure is expected to rise as Chinese pet food exporters actively expand their presence in the Vietnamese market. The EU and South Korea accounted for 14.1 percent and 13.8 percent of market share respectively in 2025, with export values of $9.3 million and $9.1 million. While EU exports remained stable throughout the review period, South Korean exports to Vietnam showed a declining trend. This is likely due to competition from several South Korean pet food investors who have established manufacturing operations in Vietnam in recent years. Meanwhile, U.S. exports of pet food to Vietnam remained modest at $300,000 in 2025.

Chart 4: Pet Food Export Value to Vietnam by Country in 2021-2025

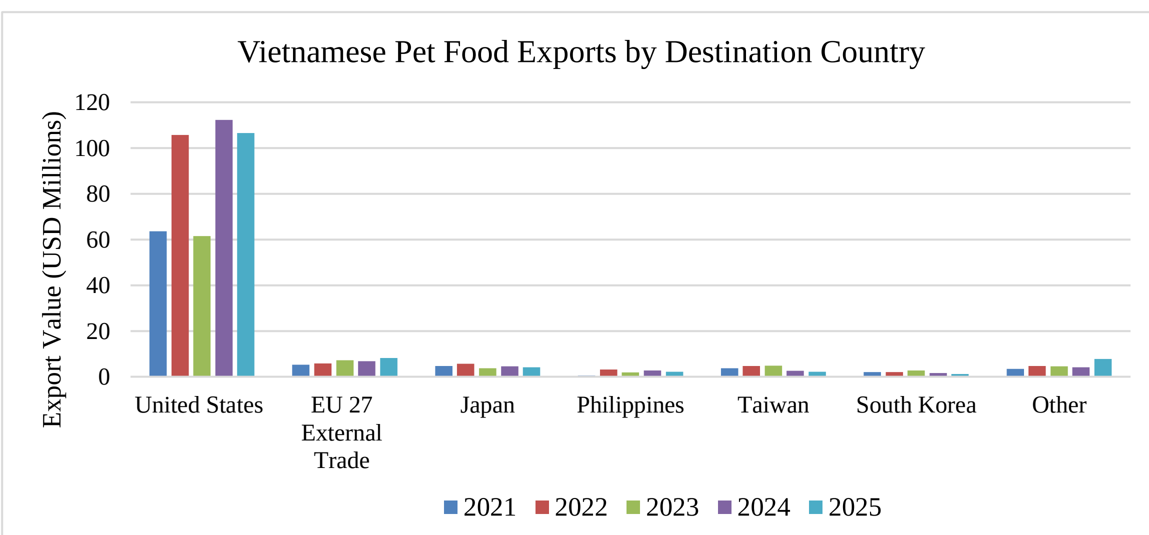


Source: Trade Data Monitor LLC.

5. Vietnam Exports Pet Food to the World

Vietnam's domestic pet food industry is notably export-oriented, generating over $132 million in exports in 2025. The United States stands as the dominant destination, receiving $107 million and accounting for over 80 percent of Vietnam's total pet food exports in 2025. Other key export markets include the EU, Japan, the United Kingdom, Taiwan, the Philippines, and South Korea. Notably, some of Vietnam's leading pet food exporters — including CP Group, Archer Daniels Midland Company (ADM), and Vietnovo — are also major buyers of U.S. grains and feed ingredients.

Chart 5: Vietnamese Pet Food Exports by Destination Country



Source: Trade Data Monitor LLC.

6. Opportunities and Challenges for U.S. Pet Food in Vietnam

U.S. pet food exports to Vietnam have remained modest and underdeveloped relative to the market's potential. Despite Vietnam's lower import tariff of seven percent — compared to nine percent in Thailand — U.S. exports to Vietnam totaled only $300,000, a fraction of the $10 million exported to Thailand. Pricing alone does not explain this gap, as premium brands from Europe, Canada, South Korea, and Japan at comparable price points have achieved stronger market presence in Vietnam.

Most U.S. pet food exports to Vietnam consist of dry dog and cat food at premium price points. This market segment of dry dog and cat foods is highly competitive, with many local and global players vying for market share. Compared to well-established Thai-manufactured brands such as Royal Canin and Pedigree, U.S. brands face a dual disadvantage: higher price points and lower brand recognition among Vietnamese consumers. A further challenge is limited product availability, as market-leading brands invest heavily in building market presence through promotions, advertising, and retailer incentive programs — areas where U.S. exporters have been less active. To compete more effectively, U.S. pet food exporters should consider targeting product segments where they can offer distinct competitive advantages, such as functional treats, therapeutic diets, and specialized health foods. As Vietnamese pet owners increasingly treat pets as family members, demand is rising for high-protein, organic, and gut-health-focused products — areas where U.S. brands are well positioned to lead.

7. Key contacts:

U.S. Department of Agriculture - Foreign Agricultural Service
The first point of contact for updated reports and trade data is the USDA/FAS Web Page:
https://fas.usda.gov/regions/vietnam

FAS has two offices in Vietnam, one at the U.S. Embassy in Hanoi and the other at the U.S. Consulate General in Ho Chi Minh City. These two offices are located at the major political and economic hubs of Vietnam and actively assist U.S. exporters of agricultural and related products, including consumer-oriented food products and fishery products. U.S. exporters seeking assistance for market access issues or any other trade issues in Vietnam can contact FAS Vietnam through email: aghanoi@usda.gov or atohochiminh@usda.gov.

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Additionally, U.S. exporters can contact State Regional Trade Groups (SRTGs) and/or FAS Cooperators and Participants for their assistance in exporting and promoting U.S. products to Vietnam.

Attachments:

No Attachments.