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Report Name: 'Pawsperty' in the Pet Food Market

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Prepared By: Fayrouz Zghoul

Approved By: Harrison Grafos

Report Highlights:

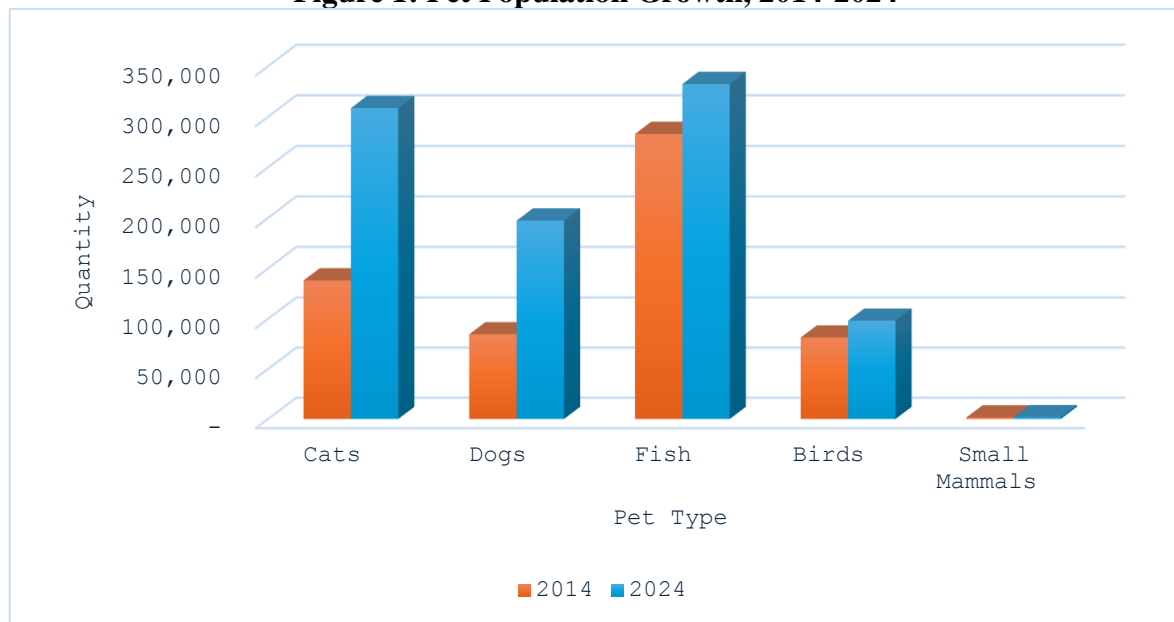
The pet population in the United Arab Emirates (UAE) grew from 588,700 pets in 2014 to 938,000 pets in 2024. This growth has driven a notable rise in pet food sales, with retail values climbing from \$61.8 million in 2014 to \$219 million in 2024, with over 250 percent growth - nearly 98 percent of which is dog and cat food. The increase reflects changing attitudes toward pet ownership, with dogs, cats, and other pets becoming more culturally acceptable. A trend of pet humanization has led owners to view pets as family, increasing demand for premium, health-focused pet food. With evolving consumer preferences and increased investment in premium pet food products, the market is poised for continued growth.

'Pawsperty' in the Pet Food Market

Introduction

The pet population in the United Arab Emirates (UAE) grew significantly over the past 10 years, showing a 59 percent increase between 2014 and 2024. In 2014, the country had only around 588,700 pets and by 2024, the pet population had nearly doubled to 938,000 pets. About 54 percent of these pets are cats and dogs, while the remaining 46 percent are birds, ornamental fish, reptiles, and small mammals (Figure 1).

Figure 1: Pet Population Growth, 2014-2024



Source: Euromonitor

This increase stems from several key factors: changing cultural norms; a growing, affluent, expatriate population; and a trend towards “pet humanization.” Traditionally, cat ownership has long been favored in the UAE, as cats are highly regarded in the Islamic faith, and residents often have smaller living spaces and busy lifestyles. In contrast, dog ownership was generally discouraged and seen as a preference for high-income Westerners. Now, dogs and other pets are becoming more widely accepted as companions.

Second, the country’s population has increased 9 percent over the past 10 years. This expatriate population includes a significant number of more affluent individuals, including Westerners, who in some cases have imported their own cultural norms. The growth rate of the pet population far exceeds the growth rate of the overall population, signaling that a large proportion of new residents are likely bringing pets with them.

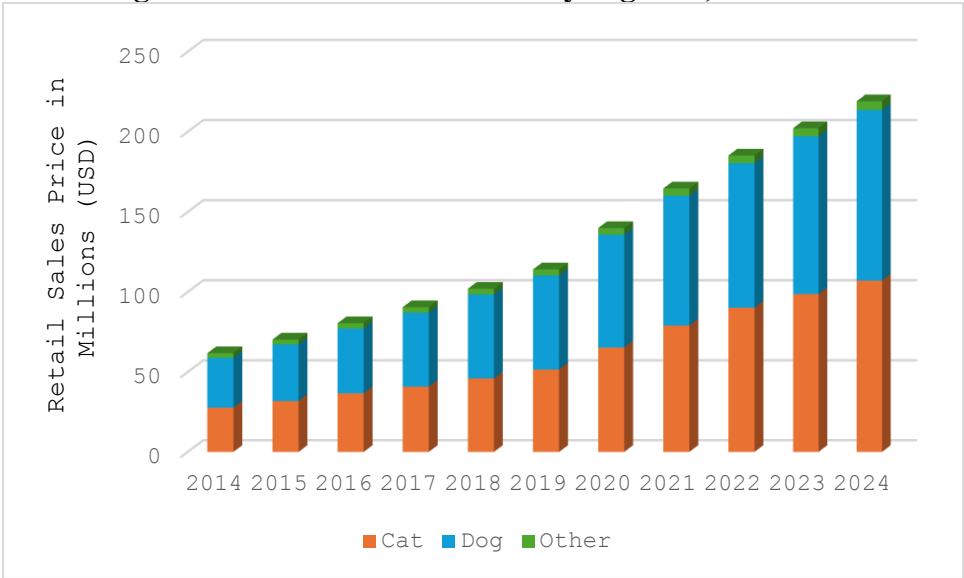
Finally, a trend towards “pet humanization” has led pet owners to view pets as members of the family. This has resulted in owners spending more disposable income on higher-quality, health-focused food

options for their companions. Pet owners increasingly regard their pets, especially cats and dogs, as family members.

‘Paw-sitive’ Market Growth

The pet food market has exploded in the UAE, with an overall increase of 254 percent over the past 10 years. Pet food retail value increased from \$61.8 million in 2014 to \$219 million in 2024 (Figure 2). Dog and cat food (\$214 million) represented nearly all the value. This growth was driven by the rising pet population, higher incomes enabling owners to invest in mid- and premium-priced food options, and the trend of pet humanization. Pet food retail volumes and values are expected to continue to grow alongside the pet population over the next five years.

Figure 2: Pet Food Retail Value by Segment, 2014-2024



Source: Euromonitor

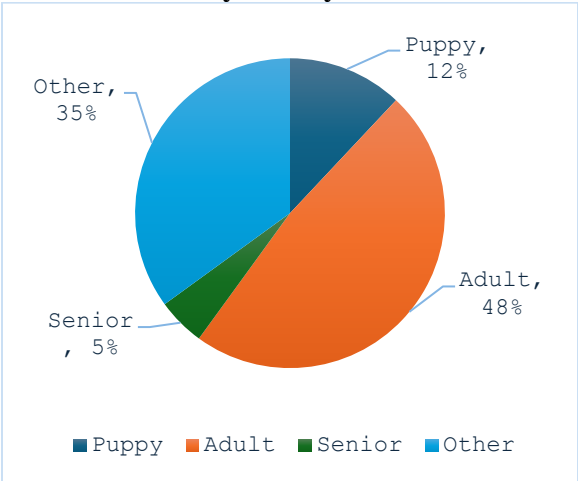
This shift in perspective has increased awareness of pet health and driven demand for “natural” and “clean” pet products. Veterinarians play a key role in guiding owners toward foods that meet specific health needs. Increasingly, consumers wish to see more treats and foods with health supplements, as well as those market as fresh, organic, and high-protein options. Consumers increasingly value clear ingredient lists and labels that highlight health advantages across all pet food categories. This trend is fueled by rising pet ownership, growing health awareness, and evolving cultural attitudes. Additionally, the expanding expatriate population and higher disposable incomes are encouraging greater investment in premium and specialized pet foods.

Dog Food

In 2024, dog food accounted for 48.7 percent of the pet food retail value at \$107 million with a forecast increase of 8 percent for 2025. Of the dog population, 50 percent are small dogs, 20 percent are medium dogs, and 30 percent are large dogs. Gulf Business reported in 2024 that 1.5 million pet owners exist in the UAE, collectively owning over 2 million pets; cats outnumber dogs two to one. Demand for all categories of dog food is expected to continue to rise over the next five years, although the growth rate is expected to slow gradually. Euromonitor projects dog food retail value to increase 44 percent by 2029.

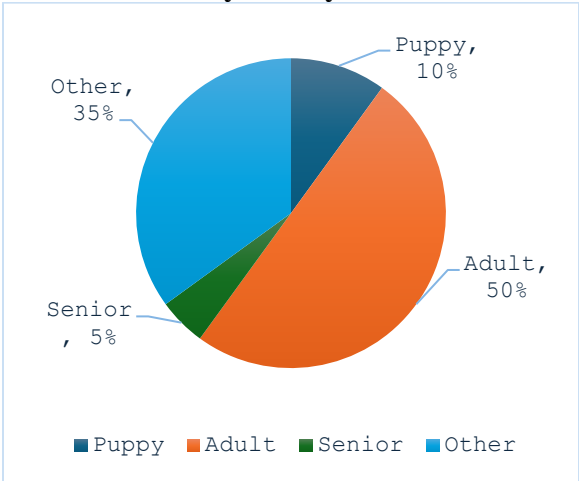
Roughly 86 percent of dog food consumption in UAE is prepared wet or dry dog food. (*Prepared* refers to commercially made, ready-to-serve items available in wet or dry form, while non-prepared food consists of raw or homemade items that require preparation before serving.) Premium-priced dry food has been the top-selling category in volume and value, and this trend is projected to continue. Premium dry foods are followed by treats, premium wet foods, and mid-priced wet and dry foods. These are projected to experience the strongest growth rate over the next five years as consumers upgrade from economy-priced or non-prepared foods to medium-priced and prepared foods and look to pamper their pets.

Figure 3: Dry Dog Food Retail Segmentation by Life Cycle



Source: Euromonitor

Figure 4: Wet Dog Food Retail Segmentation by Life Cycle

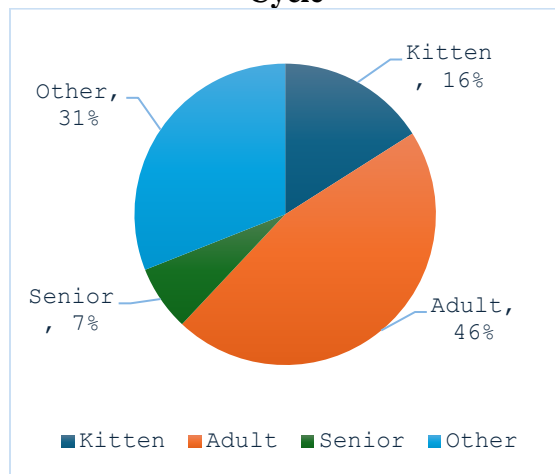


Source: Euromonitor

Cat Food

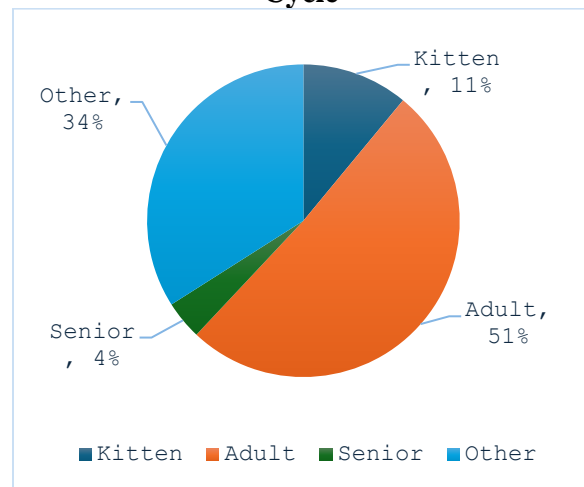
In 2023, cat food represented 48.8 percent of the pet food retail value and 55 percent of the retail volume. Like dog food, demand for cat food is projected to rise across all categories with a gradually slowing growth rate. Approximately 83 percent of cat food consumption is prepared cat food. Growth of existing cat owners transitioning from non-prepared to prepared food is expected to be limited due to the already established high preference for prepared food. Mid-priced dry food is the leading category by volume and is projected to maintain its position. Mid-priced wet food, along with premium-priced wet and dry food, are also popular, with demand for mid-priced wet food projected to grow at a slightly higher rate than other product types. Wet food is considered healthier for cats and therefore offers greater profitability potential for market participants. Additionally, cat treats are also projected to grow in both value and volume, presenting opportunities for new products to enter the market.

Figure 5: Retail Dry Cat Food by Pet Life Cycle



Source: Euromonitor

Figure 6: Retail Wet Cat Food by Life Cycle

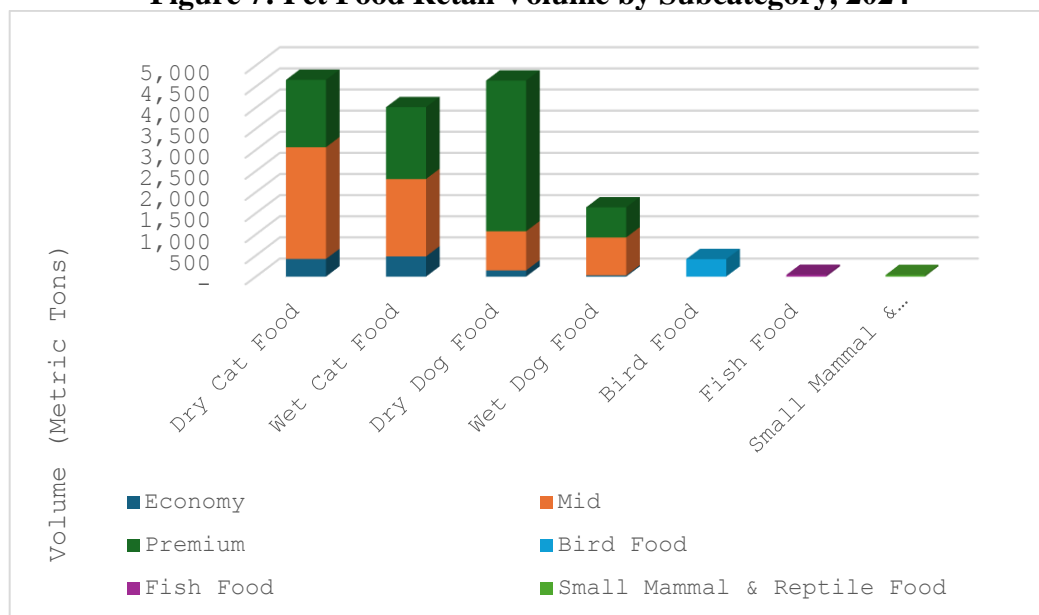


Source: Euromonitor

Other Pet Food

Although other pet foods collectively make up only a fraction of the pet food market in UAE, the retail values and volumes are projected to grow in a similar fashion to cat and dog foods (Figure 7). The market is seeing growing demand for specialized bird and ornamental fish food tailored to specific breeds and species such as falcons or clown fish. This trend reinforces premium food's appeal and boosting its growth and value. Consumers increasingly seek out bird food that incorporates a mix of seeds and pellets, and ornamental fish foods that incorporate flakes, pellets, frozen options, and capsules. More detailed feed specifications from producers allow ornamental fish and bird owners to provide the most suitable food for their pets. The same principle applies to food for reptiles and small mammals.

Figure 7: Pet Food Retail Volume by Subcategory, 2024



Source: Euromonitor

Key Players

In the UAE dog food market, Saint Vincent Group leads with a dominant market share of 24.6 percent, followed by Mars GCC, which holds a notable 10.4 percent (Table 1). Among individual brands, Royal Canin is the most popular, capturing 24.6 percent of the market. Pedigree follows with 10 percent, while Taste of the Wild accounts for 5.1 percent, completing the top three brands.

Table 1: Dog Food Company Share

Company	Percent
Saint Vincent Group GT LLC	24.6
Mars GCC	10.4
Naturally for Pets LLC	5.1
Nestle Middle East FZE	5.0
Pet Shop LLC, The	2.2
Charoen Pokphand Group	1.9
Thumbay Marketing & Distribution Co.	1.0
Waitrose Ltd	0.8
Real Pet Food Co., The	0.3
Eurovets Veterinary Medicines LLC	0.2
Beaphar BV	0.2
International Kennel Supplies	0.0
Other Private Label	0.2
Others	48.1

Source: Euromonitor

Table 2: Dog Food Brand Share

Brand	Percent
Royal Canin	24.6
Pedigree	9.2
Taste of the Wild	5.1
Beneful	2.0
JerHigh	1.9
Pro Plan	1.7
Lily's Kitchen	1.3
Dog Chow	1.2
Ziwi Peak	1.0
Arden Grange	0.9
Waitrose	0.8
Cesar	0.4
Nature's Gift	0.3
Calibra	0.2
Beaphar	0.2
Simba	0.0
Other Private Label	0.2
Others	48.1

Source: Euromonitor

The UAE cat food market is similarly concentrated, with Nestlé Middle East, Saint Vincent Group, and Mars GCC collectively commanding 86.5 percent of the market (Table 3). Royal Canin remains the leading brand, holding a 28 percent market share (Table 4). It is followed by Sheba at 13.6 percent, Friskies at 13.3 percent, Fancy Feast at 12.9 percent, and Whiskas at 11.5 percent, making up the top five brands in the segment.

Table 3: Cat Food Share

Company	Percent
Nestle Middle East FZE	32.1
Saint Vincent Group GT LLC	28.1
Mars GCC	26.3
Naturally for Pets LLC	2.2
Waitrose Ltd	0.9
Safcol Australia Pty Ltd	0.8
The Pet Shop LLC	0.8

Inaba Pet Food Co. Ltd	0.3
Thumbay Marketing & Distribution Co.	0.2
Beaphar BV	0.2
Eurovets Veterinary Medicines LLC	0.1
RCL Foods Ltd	0.1
EuroVita Zooshop GmbH	0.0
Other Private Label	0.5
Others	7.2

Source: Euromonitor

Table 4: Cat Food Brand Share

Brand	Percent
Royal Canin	28.1
Sheba	13.6
Friskies	13.3
Fancy Feast	12.9
Whiskas	11.5
Cat Chow	2.9
Taste of the Wild	2.2
Felix	1.9
Waitrose	0.9
Snappy Tom	0.8

Pro Plan	0.8
Kitekat	0.8
Dreamies	0.5
Lily's Kitchen	0.5
ONE	0.3
Arden Grange	0.3
Ciao	0.3
Ziwi Peak	0.2
Other Private Label	0.5
Others	7.6

Source: Euromonitor

In the UAE's other pet foods category, Gonzalo Zaragoza Manresa holds the largest company share at 32.3 percent (Table 5). Beaphar BV and JBL GmbH & Co KG each maintain a market share of 10.2 percent, while Premium Nutritional Products Inc. follows closely with 10 percent. Among individual brands, Kiki leads the segment with a 32.3 percent market share, making it the most popular choice in this category. It is followed by Beaphar, JBL, and Zupreem (Table 6).

Table 5: Other Pet Food Company Share

Company	Percent
Gonzalo Zaragoza Manresa SL	32.3
Beaphar BV	10.2
JBL GmbH & Co. KG	10.2
Premium Nutritional Products Inc.	10.0
Eurovita Zooshop GmbH	9.1
Tropical Tadeusz Ogrodnik Co.	8.7
Mars GCC	1.5
Others	17.9

Source: Euromonitor

Table 6: Other Pet Food Brand Share

Brand	Percent
Kiki	32.3
Beaphar	10.2
JBL	10.2
Zupreem	10.0
Vitakraft	9.1
Tropical	8.7
Trill	1.5
Others	17.9

Source: Euromonitor

This competitive landscape underscores the strong market presence of established players, particularly in the premium pet food category.

Retail Channels

Pet shops and superstores account for about 56 percent of pet food retail value, grocery stores for 28 percent, and e-commerce channels for 9 percent. E-commerce is becoming an intriguing channel for consumers as it saves time, offers a broader product and price comparison, and allows bulk purchases without physical store visits. Pet owners can also set up subscriptions for regular deliveries to maintain a steady food supply. E-commerce has a slightly higher value share for other pet food compared to dog and cat food. Given the busy schedules and preference for convenience among UAE citizens, e-commerce channels are highly likely to see strong future growth rates.

Import Requirements

Pet food products should be registered and approved by the UAE's Ministry of Climate Change and Environment (MOCCA). Consult the [MOCCA website](#) for more information on the requirements to register and approve pet food products. Once the product is approved, a local importer (not the supplier) can apply for an online import permit valid for 30 days.

A health certificate is required for any product exported to UAE including pet food. A health certificate should be issued by governmental authority in the United States; certificates or declarations issued by a supplier are not accepted. For pet food with animal origin, the UAE accepts the VS Form 16-4 (certificate) from the U.S. Department of Agriculture's Animal Health and Inspection Service. For dry pet food, a certificate from state authorities is accepted. To avoid rejection or delays at the port of entry, U.S. suppliers are encouraged to link the health certificate with the shipment by including shipment details like container number, bill of lading number, or quantities.

Pet food labels must be printed in Arabic on the package or by stickering. Arabic and English labels must contain the statement, "For Pet and Not Fit for Human Consumption." Production and expiration dates are required; refer to UAE.S 5031:2018, "General Requirements for Pet Food and their Labeling." In addition to labeling, the standard includes the expiration dates for varieties of pet food products, such as seven days for products with chilled poultry meat, 12 days for products with chilled red meat, 18 months for dry food in the form of balls, 12 months for biscuits, and 24 months for canned meat. Exporters should verify labeling requirements with their importers before shipping.

Products containing pork or its derivatives must be clearly stated in the ingredients section of the label. If the product contains or was produced from genetically modified organisms, "Genetically Modified" should be included in the ingredient section with same font size but with different color.

Conclusion

With a growing population, changing attitudes towards pet ownership, plus cultural considerations, the UAE's pet food market is poised to continue its growth in the years to come. Market entrants, especially in the premium pet food segment, have an opportunity to capitalize on UAE consumers' growing appetite for pet foods. Those firms offering product that complements consumers' changing lifestyles and attitudes as it relates to their pets, including in the trend towards "healthy" products, will be positioned for success.

Attachments:

No Attachments.