

**Voluntary Report** – Voluntary - Public Distribution

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**Country:** China - People's Republic of

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**Report Highlights:**

In 2024, China's pet (dog and cat) consumer market reached \$41.9 billion (302 billion yuan), an increase of 7.5 percent compared with 2023. Despite the economic headwinds faced by Chinese consumers, China's pet consumer market demonstrated resilience and steady growth following a 10-year period of rapid growth. Pet food remained the largest segment of the pet consumer market in 2024, with a share of 52.8 percent among all pet-related consumption. Amid a rising domestic pet food manufacturing industry and competition from international markets, the United States remained the top pet food supplier to China accounting for over 69 percent of market share the first 10 months of 2024. Market trends indicate that Chinese consumers continue to prefer premium U.S. pet food.

## Section I: China's Pet Market Overview for 2024

### 1. *Decelerated but resilient consumer market growth*<sup>1</sup>

While China's pet (dog and cat) consumer market growth started to slow down in 2024, the total market size grew to \$41.9 billion (302 billion yuan), an increase of 7.5 percent compared with 2023. The size of the dog consumer market increased 4.6 percent compared with 2023, while the cat market increased 10.7 percent.

### 2. *Offline pet stores*<sup>2</sup>

In the first half of 2024, the number of pet stores (including regular pet shops and wholesale stores) in China reached 81,534, an increase of 1.6 percent over the same period in 2023. The locations of China's offline pet stores are relatively scattered, with the total number of pet stores in the four first-tier cities Beijing, Shanghai, Guangzhou and Shenzhen accounting for 13 percent of China's total; 15 new first-tier cities such as Chengdu, Chongqing and Hangzhou accounting for 24 percent; second-tier cities accounting for 21 percent; third-tier cities accounting for 19 percent; fourth-tier cities accounting for 15 percent; and fifth-tier cities accounting for eight percent. Pet services like grooming and beauty are the primary function of offline pet stores.

### 3. *More cats than dogs*<sup>3</sup>

In 2024, the total pet population in China was 124.1 million with 52.6 million dogs and 71.5 million cats, an increase of 1.6 percent and 2.5 percent respectively compared to 2023. This continues the trend of Chinese pet owners preferring cats over dogs, reflecting a perception that dogs require a higher activity level outdoors than cats. Future projections indicate a continued decrease in the total dog population, which is attributed to the time constraints of young urbanites, with prolonged working hours and limited living space in urban areas.

### 4. *Pet owners' distribution*

Chinese pet owners reached 106 million in 2023, driven by largely by growth in first-tier and third-tier and below cities. The share of pet owners in first-tier cities was 29 percent, while the share of third tier and below cities was 30 percent. Among the top 10 cities with a high proportion of pet owners, Beijing and Shanghai have the highest proportion of dog owners, while Guangzhou and Beijing have the highest proportion of cat owners.

The increase of pet owners in recent years was mainly driven by three generational segments, those born post-00s, post-1990s and post-1980s. Over 41.2 percent of the post-1990s segment, 25.6

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<sup>1 3 4</sup> Pet Industry White Paper 2024

<sup>2</sup> China's pet industrial media Chong Ye Jia

percent of post-00s and 26.5 percent of post-1980s segments are pet owners.<sup>4</sup> These segments are perceived to value the interaction and companionship with pets and are willing to purchase premium products and services for them.

5. *Annual consumption for pets increased slightly*

The average annual consumption for pets declined in 2023 but slightly increased in 2024. The average annual consumption per dog was \$411 (2,961 yuan), a three percent increase, while consumption per cat was \$281 (2,020 yuan), an increase of 4.9 percent. This shows that while the market is growing, individual pet owner consumption has steadied.

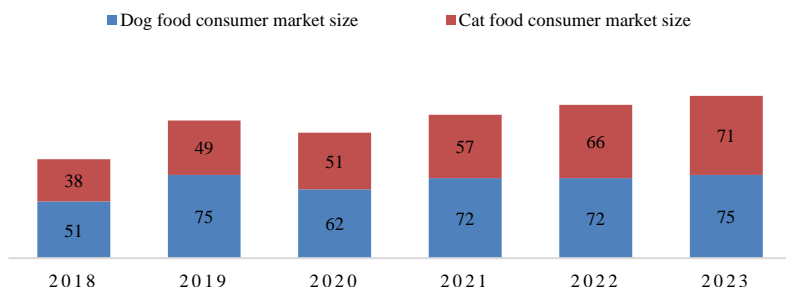
**Section II: Pet Food Consumption**

Pet food -- dry pet food, semi-moist pet food, snacks and food supplements -- accounted for a large portion of the overall pet consumption market structure in China, with an average of 56.1 percent in the last three years. In 2024, the market size of China’s pet food reached \$22.2 billion (159.5 billion yuan), with a year-on-year increase of 9.2 percent. From 2013 to 2024, the compound annual growth rate of China’s pet food market was 22.4 percent, far higher than the global average growth rate. However, the current market penetration rate in China is around 20 percent, compared to other developed countries in Europe and North America which has over a 90 percent penetration rate.<sup>5</sup>

1. *Cat food consumer market increased significantly*

In 2023, the size of China’s cat and dog pet food consumer market size was \$9.8 billion (71 billion yuan) and \$10.3 billion (74.8 billion yuan), with a year-on-year growth of 7.6 percent and 3.9 percent respectively. Chinese consumers’ consumption of cat food surpassed dog food for the first time in 2022.

Chart 1: 2018-2023 China's Cat and Dog Consumer Market Size (billion yuan)<sup>6</sup>



2. *Preference for baked and freeze-dried pet food*

In 2024, dog owners’ preference for baked dry food, freeze-dried food, and fresh food increased. Among them, the largest increase was in baked dry food and wet staple food. Cat owners’ preference

<sup>5</sup> Pet Notes Commercial Research

<sup>6</sup> 2023-2024 Pet Food Consumption Report

for baked dry food and fresh food increased, while the preference for freeze-dried food and extruded food decreased.<sup>7</sup>

Chart 2: Chinese Dog and Cat Owners' Preference for Staple Food

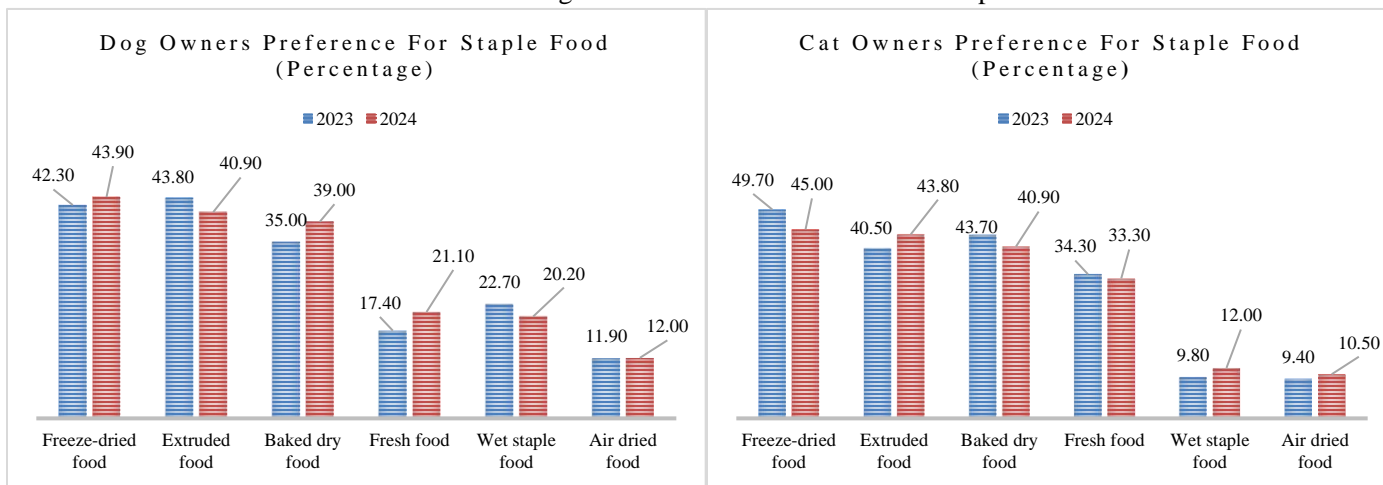


Photo: Shanghai based offline pet stores display numerous U.S. baked and freeze-dried pet food brands.

### 3. Purchase channels

Chinese consumers are more inclined to purchase pet food products through online channels. Large and comprehensive e-commerce platforms are the preferred choice for consumers, of which Taobao/Tmall and JD.com are the largest. However, the usage rate of emerging live broadcast platforms such as TikTok and other applications increased significantly in 2023.

### 4. Import versus domestic

According to the China Feed Industry Association, there are 200 certified pet food manufacturers in China, with an annual total production capacity of 1.12 million tons. A total of 23 provinces and regions produce pet food, in which Hebei province remain the largest producer of pet food in China, with over 429,000 tons per year, followed by Shandong Province with 268,000 tons.

<sup>7</sup> Pet Industry White Paper 2024

In terms of brands, the staple dog food market is still dominated by imported brands, while the staple cat food market has seen a slight increase in the preference for Chinese brands. Snacks and nutritional products are a key target for Chinese brands to gain market share.

Notably, 47 percent of dog owners have no brand preferences, while 27 percent only buy Chinese brands, and 18 percent only buy foreign brands. For cat owners, 48 percent do not have brand preferences, 28 percent only buy Chinese brands, and 19 percent only buy foreign brands. Overall, the preference for Chinese brands has increased significantly, especially for cat owners.

#### 5. *High-end versus low-price pet food*

According to China's Pet Food White Paper 2023, China's pet food consumer market has developed into two polarities, high-end and low-price pet food markets. The high-end consumption is relatively stable, while the brand competition among the low-price pet food market has become increasingly fierce, causing product prices to drop significantly.

Meanwhile, users in the middle are gradually moving towards the one of the two poles. The quality of some low-priced products has improved, attracting some middle-level users. On the other hand, some middle-price consumers have upgraded their consumption to purchase high-end products due to an increased awareness of pet nutrition and health.

#### 6. *Regional pet food market pattern*

East China remained the largest pet food consumer market in China in 2023 accounting for 36 percent of the market, followed by western China 17 percent, and south China 15 percent.

- East China has a developed economy, a high-income level of residents and large pet population with strong demand for high-end pet food.
- Western China is an emerging market in recent years driven by continuous economic growth, improved living standards, and increasing number of young consumers.
- In South China, besides pet dogs and cats, aquarium, exotic and reptile pets are also popular pets. The hot and humid weather in South China makes walking dogs more challenging, leading to higher growth among the pet cat population.
- North China is the largest pet food producing region in China, especially Hebei and Shandong province which account for over 60 percent of China's pet food production. Meanwhile, as one of the top cities in China, Beijing has a large population base and consumption capacity with annual pet consumption of over several billion yuan.
- Northeast China, especially Liaoning Province, is considered China's pet breeding center, supplying 70 percent of the country's market for pet dogs and cats. It is a good starting place for pet food brands targeting breeding animals. See [China: Northeast China Pet Food Market Brief | CH2024-0114](#) for more details.

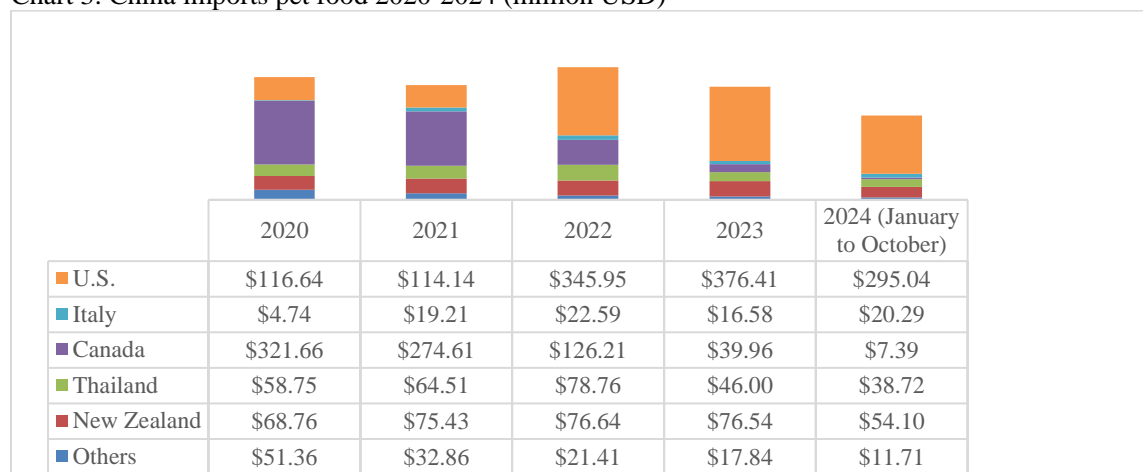
### Section III: U.S. Pet Food Performance in China

In 2023, the United States remained the top exporter to China. U.S. pet food also remained the top category for facilities newly registered by China’s General Administration of Customs (GACC) and new import licenses approved by the Ministry of Agriculture and Rural Affairs (MARA). A large part of newly approved import licenses are for baked and freeze-dried pet food, which reflect the demand trends of China’s consumers and their preference for U.S. premium products.

#### 1. China’s total imports declined

According to China Customs, imported pet food under HS 2309.10 (dog and cat food for retail sale) accounted for \$427.24 million in the first ten months of 2024, down 17 percent compared to the same period in 2023. The decrease is most likely due to increasing competition from the fast-growing Chinese domestic pet food industry and consumption decline after the pandemic.

Chart 3: China imports pet food 2020-2024 (million USD)<sup>8</sup>



#### 2. U.S. remains the top pet food exporter to China

According to U.S. Census Bureau Trade Data, the United States exported \$236.9 million of pet food under HS 2309.10 during the first nine months of 2024, up nine percent compared to the same period of 2023. According to Chinese customs data, the United States ranked as the top source of imported pet food into China.

#### 3. U.S. exports and new registrations tops China’s import market

As of July 2024, there were 114 U.S. facilities registered with GACC, of which 19 were newly added or renewed their registration since January 2023. In the first ten months of 2024, MARA approved a total 186 SKUs of imported U.S. pet (dog/cat) foods by four issuances of notices (No. 756, No. 770, No. 788, No.802, No. 811, and No. 834), accounting for 49 percent of total approval.

<sup>8</sup> Trade Data Monitor

#### 4. *Import tariff exclusion*

U.S. pet foods exported to China are currently subject to additional tariffs which brings the total tariff for U.S. retail packaged pet food (HS 2309.1090) to 29 percent, including a provisional tariff of four percent and an additional tariff of 25 percent. The additional tariff can be reduced upon request by importers. U.S. companies interested in exporting to China should work with their importers/agents to confirm how this exclusion process may apply to them.

For more details, please refer to below guidance on China's retaliatory tariffs and tariff exclusion process for U.S. products.

[Updated Guidance on China's Retaliatory Tariffs and Tariff Exclusions Process for US Products | CH2020-0106](#)

#### 5. *USA Pavilion at Pet Fair Asia 2024*



On August 21-25, the USDA Agricultural Trade Office in Shanghai organized a USA pavilion to showcase over 22 U.S. pet food companies, USDA Cooperators and state governments at Pet Fair Asia 2024. Pet Fair Asia is the largest pet related tradeshow in the Asia Pacific region, having been held in Shanghai for 26 years. The show attracted 124,000 professional visitors, 386,000 consumers, and 24,000 pet-related brands. ATO Shanghai expects to participate in the upcoming 27<sup>th</sup> Pet Fair Asia in August 2025 to continuing the support on U.S. industries towards the burgeoning China's pet food market. Please contact [ATOShanghai@usda.gov](mailto:ATOShanghai@usda.gov) for

additional information.

2024 Pet Fair Asia event videos and media posts:

- 1) Video recording: [USDA Agricultural Trade Office in Shanghai had a strong presence at Pet Fair Asia 2024 \(youtube.com\)](#)
- 2) Pre-event WeChat media post for the introduction of U.S. exhibitors company profiles and featured products  
[四大海外展团携 70+品牌及新品亮相 2024 亚宠展，新西兰 | 美国 | 日本 | 韩国趋势一站 Get! \(qq.com\)](#)
- 3) Media post for ATO Shanghai Director addressing at Asia Pet Food Summit  
[2024 亚洲宠物食品峰会圆满举办 | 共探宠食行业向善发展之路 \(qq.com\)](#)
- 4) U.S. Consul General Shanghai, Scott Walker, posted ATO's participation in Pet Fair Asia 2024  
<https://x.com/USCGShanghai/status/1826811292503462351>

## Recommended Trade Shows:

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\*Dates are accurate at publishing, but subject to change

### **Pet Fair Asia** ([www.petfairasia.com/en/](http://www.petfairasia.com/en/))

- Shanghai, August 20-24, 2025
- Pet Fair Beijing, February 27 to March 2, 2025
- Shenzhen, December 2025 (pending)

### **The One Pet Show (TOPS)**

- Shanghai, May 8-11, 2025

### **Northeast (Shenyang) International Pet Expo** ([www.sypetfair.com](http://www.sypetfair.com))

- Shenyang, May 23-25, 2025

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

- Orlando, Florida, March 26-28, 2025

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

- Las Vegas, August 2025

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

## Helpful Reports and Resources:

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### **GACC Registration list:**

[Updated list of U.S. pet food producers \(114 facilities\) by China GACC. \(Updated July 2024\)](#)

### **MARA registration List**

MARA relevant three notices regard approving the registration of imported feed products including pet foods in 2024.

- [No. 756](#), issued on January 31, 2024
- [No. 770](#), issued on March 25, 2024
- [No. 788](#), issued on May 16, 2024
- [No. 802](#), issued on June 28, 2024
- [No. 811](#), issued on July 24, 2024
- [No. 834](#), issued on October 12, 2024

### **Related USDA GAIN Reports:**

- [FAIRS Country Report](#) by USDA Foreign Agricultural Service (USDA/FAS GAIN report: CH2022-0038, dated April 20, 2022)
- [China: Update - US Pet Food is Poised to Expand in the China Market | USDA Foreign Agricultural Service](#) (dated May 13, 2022)
- [US Pet Food Exports to China Surpass All Expectations | CH2023-0019](#) (dated February 10, 2023)



- [Registration and Export Processes for US Pet Food and Related Products to PRC China | CH2023-0034](#) (dated March 08,2023)
- [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)

**Attachments:**

No Attachments.