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Report Highlights:

In 2025, China's pet food market is expected to see 6 to 8 percent growth in high-end and functional products, with a shift towards balanced nutrition and health support. High-demand product categories include staple food, treats, nutritional supplements, and medicines, with pet owners showing a stronger willingness to spend on these items. U.S. pet food exports to China hit a record high of \$296.6 million in 2024, despite a decline in China's total pet food imports, demonstrating consistent consumer preference for premium U.S. products.

Section I - China’s Pet Market Overview

1. Pet Market Size

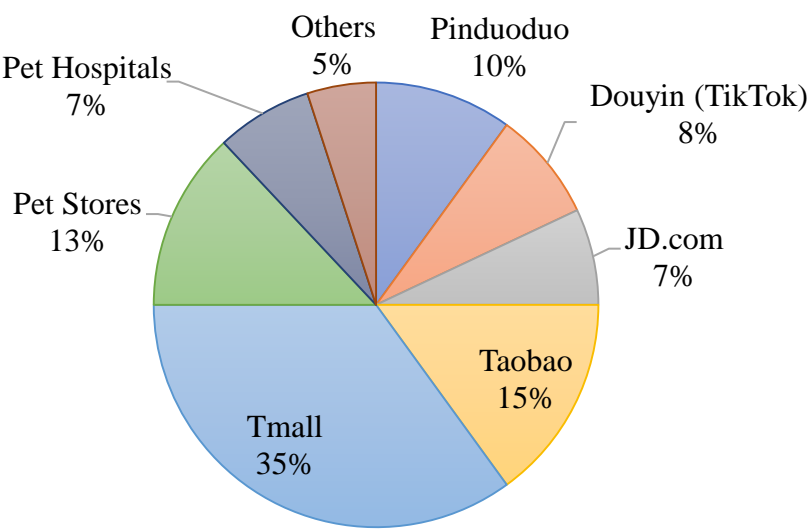
In 2024, China’s pet (dog and cat) consumer market reached \$41.9 billion (302 billion RMB), an increase of 7.5 percent compared to 2023. Pet food remained the largest segment of the pet consumer market in 2024, with a share of 52.8 percent among all pet-related consumption. The industry projects that China's pet population will reach 300 million by 2035, driven by urbanization, the aging ‘silver generation’, and generation Z entering the workforce.

2. Online and Offline Retail Breakdown

The specific channel composition shows that the Tmall platform accounts for 35 percent, Taobao accounts for 15 percent, JD.com accounts for 7 percent, TikTok accounts for 8 percent, and Pinduoduo accounts for 10 percent. Pet stores account for 13 percent, pet hospitals account for 7 percent, and other channels account for 5 percent.

China’s e-commerce sectors are diverse and competitive, with platforms serving varied consumer needs. Tmall and JD.com are well-established traditional e-commerce platforms focusing on branded, high-quality goods for middle-class and affluent shoppers. TikTok (Douyin) and Pinduoduo blend social interaction, entertainment, and group buying, appealing to younger and price-sensitive consumers. Success in this landscape relies on product authenticity, engagement, and digital innovation.

Graph 1: Online and Offline Sales Channels



Source: China’s pet industrial media Chong Ye Jia

3. Fast-growing Channels

The fastest-growing channels included instant retail platforms like Meituan and Ele.me, which specialize in hyper-local, on-demand delivery services. While originally focused on food delivery, these platforms have rapidly expanded to offer a wide range of consumer goods — including groceries, household items, and increasingly, pet supplies. Leveraging vast networks of local merchants and delivery riders, they fulfill orders within 30–60 minutes, catering to consumers’ urgent needs. On these platforms, pet supplies have outpaced food in sales due to strong immediate demand. Other fast-growing channels included Xiaohongshu (Rednote), where pet supplies thrived thanks to their visual appeal and content-friendly nature, and offline supermarkets, where over half of the pet product shelves were stocked with supplies.

4. High-Demand Product Categories

Staple food and treats still dominate the category market, while nutritional supplements and medicines, as core health categories, follow closely behind. Cat owners show a stronger willingness to spend on nutritional supplements, medicines, and supplies compared to dog owners. In terms of purchase frequency, pet food remains the most frequently purchased category. With this category, around 42 percent of dog owners and 37 percent of cat owners buy snacks monthly, a higher frequency than staple food and supplies, which are typically purchased on a quarterly basis.

5. Pet Stores: Chengdu Surpassing Shanghai

As of December 31, 2024, China had a total of 93,986 operating pet stores. This included over 70,000 comprehensive pet stores, 16,500 single-product stores, and nearly 7,000 stores specializing in live pets. Guangdong and Jiangsu lead with over 8,000 pet stores each, forming the top tier of pet store presence in China. Sichuan and Zhejiang have surpassed 6,000 stores, while Shandong and Liaoning each have over 5,000 pet stores. The top 20 cities in China each have over 1,000 pet stores, with Chengdu surpassing Shanghai to become the city with the highest number of pet stores in the country.

6. Cross-Border E-Commerce Imports Boom

Chinese pet food importers are expanding through e-commerce. One of the channels, Cross-Border E-Commerce (CBEC) has become an attractive entry point for import pet food, offering advantages such as reduced regulatory hurdles, expedited customs clearance, and favorable tax policies. For instance, pet food imported through CBEC channels are exempt from import licenses and benefits from simplified labeling requirements and tax reductions, making it a cost-effective and efficient route for market entry. This growth is further supported by China's expanding CBEC infrastructure, including over 165 pilot zones and more than 2,500 overseas warehouses, which enhance logistics and distribution capabilities. For more information on CBEC, see FAS China’s [GAIN report on Cross-Border E-Commerce \(CH2023-0180\)](#).

Section II - Pet Food Consumption Development and Trends

China's pet food sector, particularly high-end and functional pet food, is expected to experience significant growth in 2025, with domestic brands outperforming international brands and gaining market share. Pet food demand is shifting towards functionality with nearly half of pet owners switching staple pet food brands in the past 6 months mainly due to changing nutritional needs. Digestive health, immune boosting, and hide care are the top functionality characteristics sought by pet owners.

1. Market Size and Growth Drivers

In 2024, China's pet food market exhibited strong growth driven by pet consumption upgrades, demographic changes, and the rise of domestic brands. This growth is attributed to the increasing number of pets and higher spending per pet. In 2024, the average annual spending per pet dog was approximately \$411 (2,961 RMB), a 3 percent increase compared to 2023; the average annual spending per pet cat was approximately \$28.56 (2,020 RMB), a 4.9 percent increase compared to 2023. The pursuit of pet health and quality of life further fueled the consumption upgrade in the pet food market.

2. Production: Accelerated Regional Concentration, Shandong and Hebei Lead

In 2024, China's total pet food production reached 1.6 million tons, a 9.3 percent increase, significantly outpacing the overall growth of the animal feed industry which decreased by 2.1 percent. Shandong and Hebei contributed to over 70 percent of the total production. Emerging production areas like Tianjin (35,500 tons, increase of 58.5 percent) and Henan (11,800 tons, increase of 119 percent) showed impressive growth.

3. Consumption: Cat Economy Leads, Polarization in High-End and Value Markets

In 2024, the cat consumption market grew by 10.7 percent, significantly outpacing the dog market's 4.6 percent growth. This trend is linked to the preferences of the younger millennial and Z generations, who prefer the lower maintenance cat ownership. The high-end market is dominated by imported brands, led by U.S. pet food products. Many Chinese domestic brands entered the mid-to-low-end market, leading to increased price competition at this consumer tier. Domestic OEM brands used cost-effective strategies to capture emerging markets in Southeast Asia and Latin America.

4. Functional Food and Treats Trends

In 2025, consumer demand is rising for pet food with added benefits like liver and heart support. Dog owners prioritize interactive and dental treats, while cat owners focus on nutritional supplements. Owners of small dog breeds drive demand for freeze-dried training treats, while jerky and chews support protein intake and dental health. Cat treats like liquid snacks and freeze-dried meat remain popular, with high demand for functional options like hairball control and hydration.

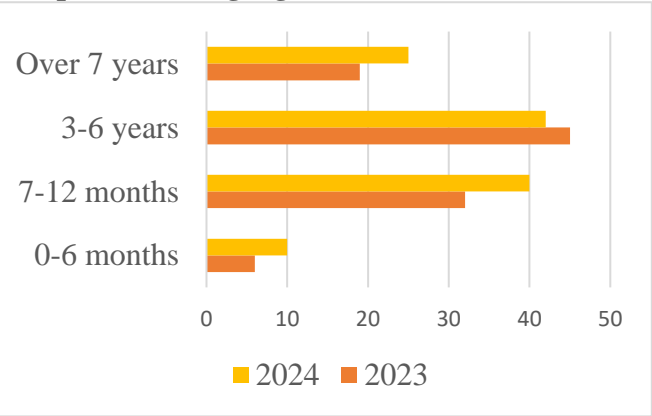
5. *Fast-Growing Pet Treats*

High growth in dog treats include freeze-dried snacks, cartilage treats, meat floss, dental sticks, air-dried meat, meat-wrapped chews. High growth in cat treats include freeze-dried donuts, cat grass sticks, interactive pocket treats, cakes, yogurt-based snacks, freeze-dried lollipops. Emerging needs include heart and blood health for dogs, and liver and kidney support for cats.

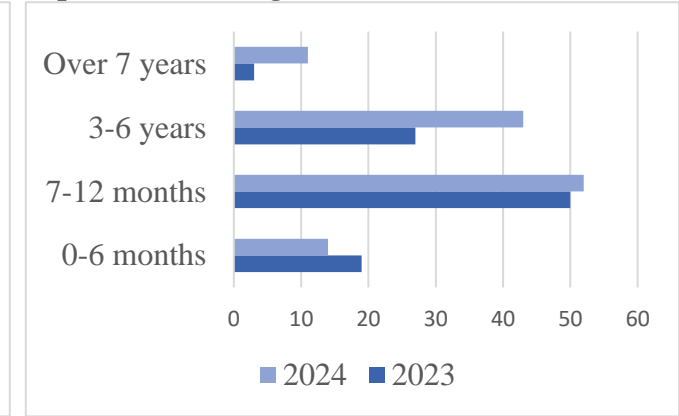
6. *Prescription Diets & Senior Pet Nutrition*

Prescription pet food sales are rising, with a 66 percent increase on online channels. Top sellers include products supporting urinary health, digestive health, and low-fat diets. The aging pet population is also growing with senior dogs (over 7 years old) now making up 23 percent of the total dog population, and senior cats increasing from 3 to 11 percent. Nearly all owners of aging pets are considering senior-specific pet food, with demand rising for senior dog food with joint support, digestion aid, and cognitive health benefits. Calcium-enriched formulas are also gaining popularity.

Graph 2: Pet Dog Age Distribution (%)



Graph 3: Pet Cat Age Distribution (%)



Source: 2024 China Pet Industry Annual Report (Blue Book of Pet’s Industry)

Section III - Updates of U.S. Pet Food Export to China

In 2024, U.S. pet food exports to China hit a record \$296.6 million, though China’s total pet food imports declined by 10.4 percent.

1. *China’s Total Imports Declined*

According to the General Administration of Customs China (GACC), imported pet food under H.S. Code 2309.10 accounted for \$499.8 million in 2024, a year-on-year decrease of 11.4 percent. In January and February 2025, China’s total imports were valued at \$44.2 million, a drop of 10.4 percent compared to the same period last year. This decrease is most likely due to increasing competition from domestically manufactured pet food and the impact of the GACC’s 2025 Tariff Adjustment Plan imposed on imported pet food since January 1, 2025. See below for more information on the Tariff Adjustment Plan.

2. *U.S. Pet Food Exports to China*

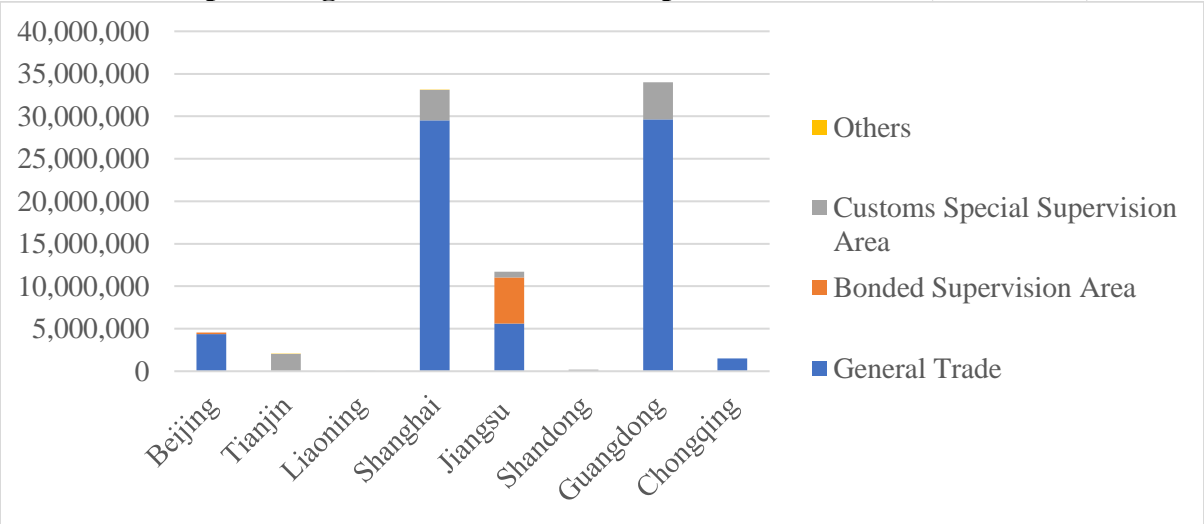
According to U.S. Census Bureau Trade Data, the United States exported \$296.6 million of pet food under H.S. code 2309.10 (dog and cat food for retail sale) in 2024. This is a 15 percent increase compared to 2023.

3. *Regional Imports from the United States*

In 2024, China imported retail packaged dog and cat food from the United States, with a total value of \$211.3 million from companies registered in Zhejiang, \$29.5 million in Shanghai, and \$29.6 in Guangdong Province under general trade. Additionally, goods imported into Bonded Supervision Areas and Customs Special Supervision Areas were notable, with companies registered in Zhejiang Province importing \$44.6 million and Jiangsu Province importing \$5.4 million under these categories.

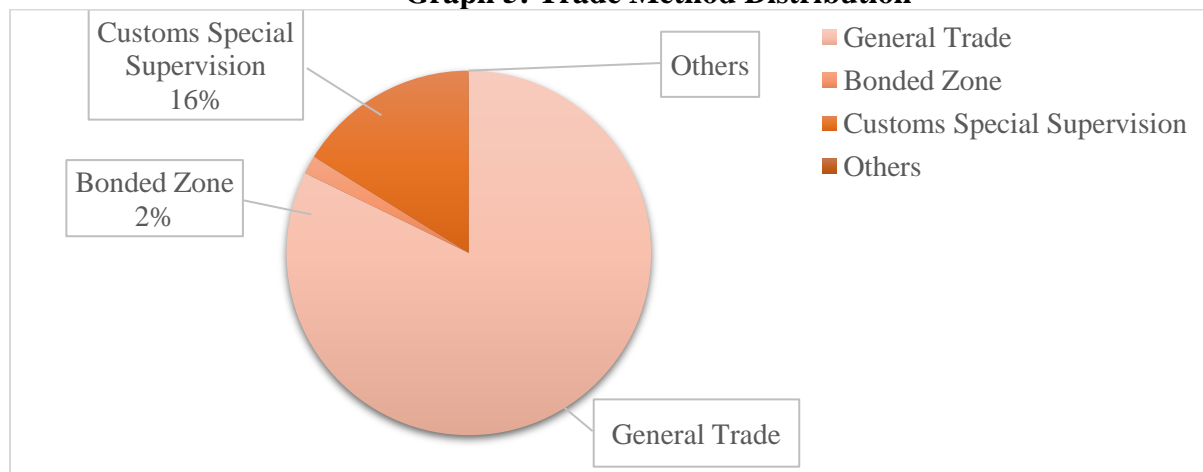
Bonded supervision areas are areas where imported goods can be stored or processed without immediate payment of Customs duties. Duties are only paid when the goods leave the area and enter the domestic market. Customs Special Supervision Areas are a broader category that includes several types of zones offering special customs policies to promote trade, manufacturing, and logistics. Examples include free trade zones (FTZs), export processing zones (EPZs), bonded logistics zones (BLZs). The graphs below highlight the regional distribution and trade methods used for importing pet food into China.

Graph 4: Regional Distribution of Import U.S. Pet Food (U.S. Dollar)



Source: General Administration of Customs China

Graph 5: Trade Method Distribution



Source: General Administration of Customs China

4. *U.S. facilities and New Product Registrations in 2024*

As of 2024, there were 114 U.S. facilities registered with GACC, of which 19 were newly added or renewed their registration since January 2023. In 2024, the Ministry of Agriculture and Rural Affairs (MARA) approved a total 255 SKUs of imported U.S. pet (dog/cat) foods by six issuances of notices (No.756, No.770, No.788, No.802, No.811, No.834, and No.855), accounting for 43.9 percent of total approvals.

5. *Tariff Adjustment Plan*

GACC raised most favored nation (MFN) tariff rates on some imported products, effective January 1, 2025. Meanwhile, the tentative MFN tariff rates previously applied to select commodities including pet food were increased or reverted to MFN rates. The tentative MFN tariff rate previously applied to prepackaged pet food (HS 23091010, 23091090) increased from 4 percent to 10 percent. For more details, please refer to FAS China GAIN report on [China's updated MFN tariff rates](#) (CH2025-0004).

6. *FAS China Organizing USA Pavilion at Pet Fair Asia 2025*

From August 21 to 25, 2025, the USDA Agricultural Trade Office in Shanghai plans to host a USA Pavilion at Pet Fair Asia 2025; this is the premier pet industry trade show in Asia, held in Shanghai, China. The 2024 trade show achieved record visitation, attracting 124,000 professional visitors, 386,000 consumers, and 24,000 pet-related brands.

As part of the USA Pavilion, exhibitors will benefit from a prime location and enhanced visibility within Hall N5, positioning their brand alongside other leading U.S. pet product companies. We invite you to register at: <https://usa-pavilions.com/form/pfa25-application/>.



Please contact the Agricultural Trade Office of Shanghai at ATOShanghai@usda.gov for additional information or support for the tradeshow.

Recommended Trade Shows:

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

- Shanghai, August 20-24, 2025
- Shenzhen, December 5-7, 2025
- Pet Fair Beijing, March 19-22, 2026

The One Pet Show (TOPS)

- Shanghai, May 8-11, 2025
- Chengdu, September 18-21, 2025

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

- Orlando, Florida, March 25-27, 2026

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

- Las Vegas, Nevada, August 13-15, 2025

Helpful Reports and Resources:

GACC Registration list:

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

MARA Registration List

MARA issued several notices regarding the registration of imported feed products, including pet food, 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
- [No. 855](#), issued on December 19, 2024

Related USDA GAIN Reports:

- [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)
- [China: Pet Food Market Update 2024 | CH2024-0162](#) (dated December 10, 2024)

Attachments:

No Attachments.