

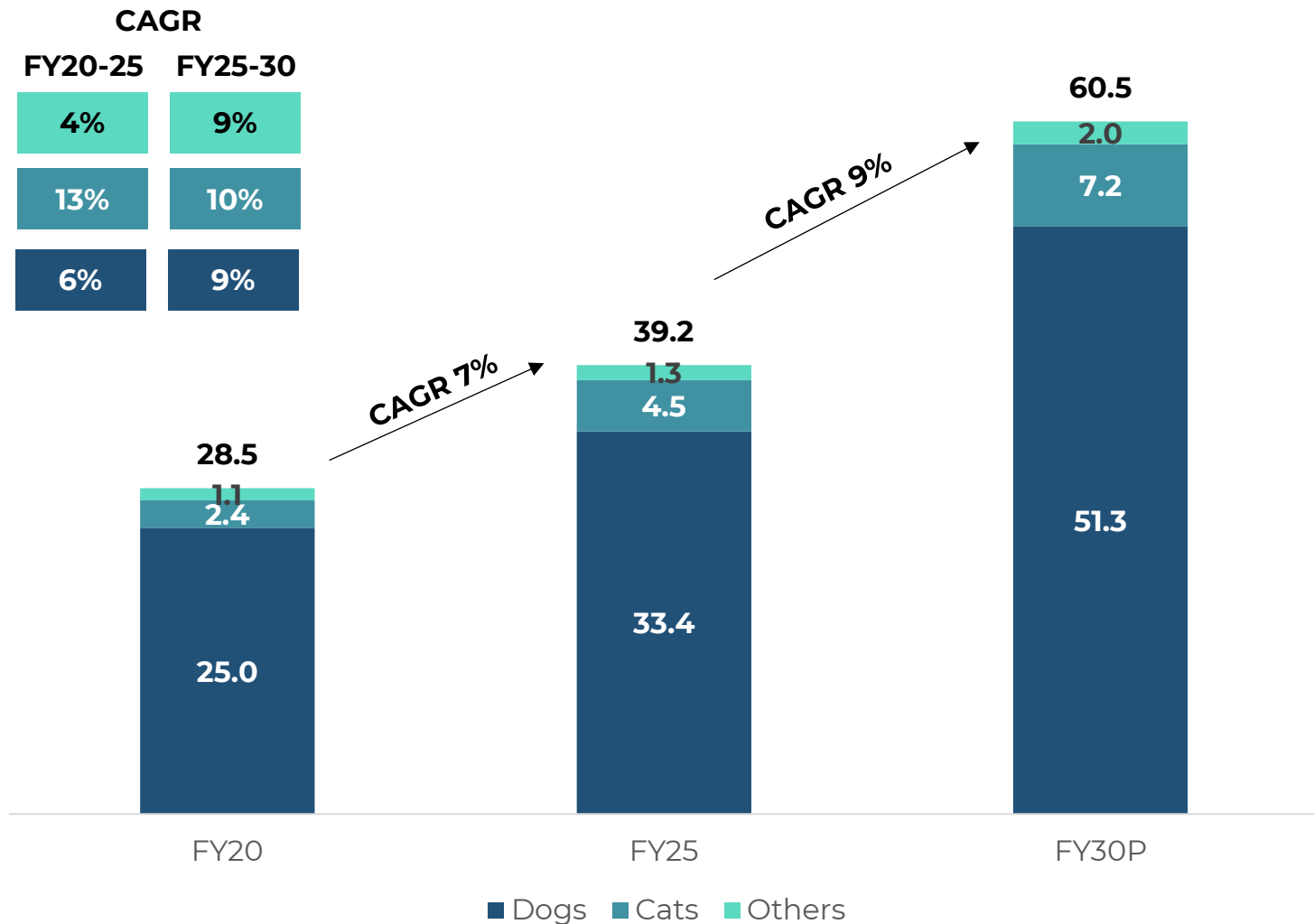
Pawprints of Growth

India's Pet Care Market Outlook



Pet population in India driven by urban lifestyles and rising acceptance

Pet Population in India (In millions)



- India's pet population grew rapidly post-2020 (28.5M to 39.2M) driven by COVID-19 companionship needs, urban lifestyle shifts, and rising mental health awareness
- Premiumization, urbanization, exposure to global trends and higher mental health awareness positioned pets as stress-relievers and integral household companions
- Growth momentum is expected to continue (CAGR 9% till FY30), supported by rising adoption across metro and tier-2/3 cities, affordability of smaller breeds, and evolving cultural acceptance



Pet care ecosystem evolving to holistic offerings

Pet Care Market in India



Pet Food

Core of the industry, covering dry food, wet food, and treats catering to nutritional needs of pets



Pet Services

Grooming services like haircuts, baths, and styling, boarding houses, dog walkers, daycare, and professional training



Pet Accessories

Lifestyle products such as clothes, paw covers, bows, and other apparel along with toys, collars, leashes, and bedding



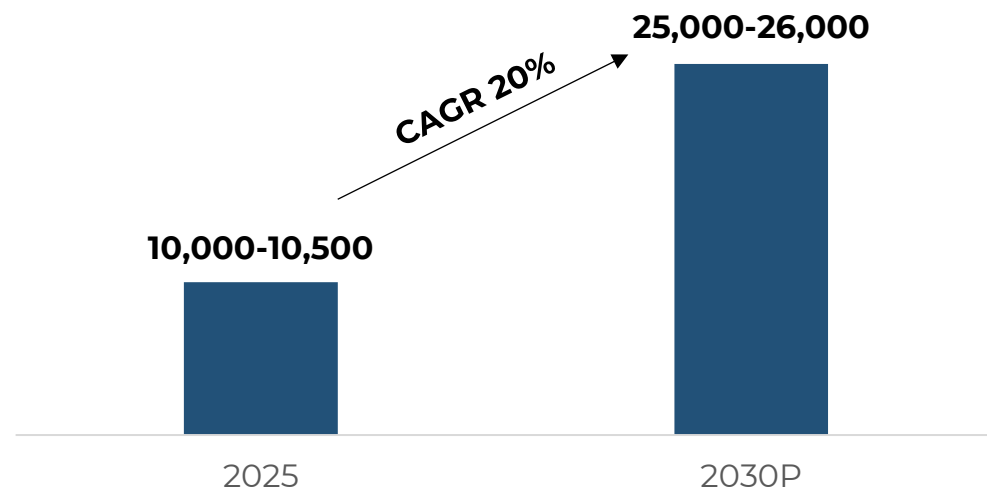
Pet Healthcare

Veterinary care including diagnostics, vaccinations, consultations, and the emerging trend of pet insurance for medical security



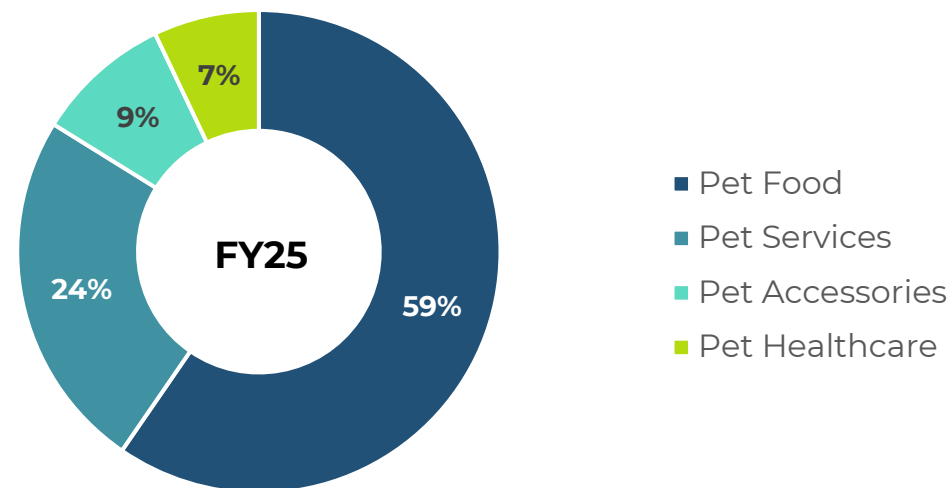
India's pet care market projected to grow 2.5x by 2030 at ~20% CAGR

Pet Care Market Size (INR Cr.)



- India's pet care market, valued at INR 10,300 Cr. in 2025, is projected to grow at a strong CAGR of 20% to reach INR 25,000 - 26,000 Cr. by 2030
- Rising pet adoption in India is fueled by urban lifestyle shifts, greater awareness through social media and NGOs, increased focus on companionship and mental well-being, and the pandemic-induced surge in demand

Market Segmentation by Value



- The industry is led by pet food, accounting for 59% of the market as a recurring expense for pet owners, followed by pet services at 24%, and accessories and healthcare at 9% and 7% respectively
- The market's growth is driven by rising awareness among pet owners of the distinct food, service, and healthcare needs of pets compared to humans



Pet care market shifting from product dominance to service offerings



- While **international brands** such as **Royal Canin, Whiskas, and Pedigree**, have long **dominated** the Indian pet food market, domestic players like **Drools, HUFT**, and Kennel Kitchen are now emerging strongly, especially in the mid-tier segment
- Players like **Zigly, Supertails, HUFT**, and **JustDogs** are building omni-channel models by combining **products with services**, reflecting the shift towards **holistic pet care solutions**
- Pet services like **boarding** and **walking** are **still nascent** but growing rapidly, **dominated by unorganized players**, except in veterinary care where organized chains such as Vetic are emerging



Market structure of pet product players in India

Segmentation	Company	Portfolio Brands
Indian & Global Brands	Mars Petcare	       
	Indian Broiler Group	     
	Farmina	  
	Nestle	
Importers	Sai International Pet Products	        
	Orange Pet Nutrition	            
	Perfect Companion India	 



Revenue of key players in the Indian pet care market

Category	Company	Established	Revenue (INR Cr.)					CAGR (FY20-24)
			FY20	FY21	FY22	FY23	FY24	
Product Focused	Mars Pet Food	-	529	727	1,065	1,233	1,245	24%
	Drools	2009	126	215	356	475	715	54%
	Royal Canin	2006	272	321	355	425	444	13%
	PCIN ¹	2018	5	15	65	207	276	173%
	Farmina	1996	-	72	173	149	162	31%
	SIPP ²	2020	-	17	49	72	86	72%
	ABK Grooming	2010	23	37	64	77	83	38%
	Kennel Kitchen	1976	55	61	65	57	55	0%
	Dogsee Chew	2015	17	23	42	97	54	34%
	Pawfect	2018	2	12	24	30	44	112%
Both Product & Services	Heads Up For Tails	2008	-	-	78	173	199	60%
	Just Dogs	2011	17	26	43	71	94	53%
	Supertails	2021	-	-	8	33	63	181%
	Vivaldis	2014	14	21	30	43	60	44%
	Wiggles	2018	0.6	4	16	27	21	143%
Services Focused	Vetic	2022	-	-	-	5	26	-



Pet parenting shifting to younger generations, led by millennials and Gen Z

Evolution of pet's relationship



Functional

1980s–2000s

Traditionally, pets in India were kept for utility, guarding homes or aiding in work. Spending was minimal and focused only on basic needs



Age: 40-60

Family member

2000s–2020

Over time, pets became companions and part of the household. This led to rising spends on packaged food, grooming, and healthcare



Age: 30-40

Child

2020–Present

Today, many pet parents treat pets like their own children. Premium nutrition, accessories, and specialized healthcare are witnessing rapid growth



Age: 18-30

Over the years, the average age of pet parents is falling, driven by rising incomes, urban living, and emotional humanization of pets. This shift highlights how millennials and Gen Z are embracing pet ownership earlier in life, reshaping demand across product categories



Pet food segmentation: price tiers and brand positioning

Segmentation	Positioning	Dogs		Cats	
		Price (INR/100g)	Indicative Brands	Price (INR/100g)	Indicative Brands
Premium	Premium vet-approved, natural, traceable, and specialized formulas	>60	   	>80	  
Mid to Premium	Better ingredient transparency, more complete nutrition claims, some life-stage / health feeds	26-60	   	59-80	  
Mass	Large-volume, low-price, commodity kibble targeted at price-sensitive buyers	<26	   	<59	   



Emerging trends in Indian pet care market (1/2)

Millennials Driving Pet Adoption and Service Growth

Millennials are driving service-heavy pet care models ranging from vet consults and grooming to daycare and pet hotels. Living in smaller setups and leading travel-oriented lifestyles, they are making pet adoption a key lifestyle choice



Brands can build **millennial-first engagement channels** – digital-first, convenience-focused, and experience-led – to capture this growing demand

Increased Spending on Pet Grooming & Lifestyle Products

Pet parents in India are increasingly treating pets as family, driving higher spending on accessories, grooming, apparel, and tech-enabled products. A notable example is the rising demand for GPS trackers for dogs, reflecting growing focus on safety



Brands can capture **adjacent wallet share** through **bundled offerings (food + accessories)** and position accessories as **wellness & safety essentials**, not just “nice-to-have.”

Growth of Pet Humanization Trend

As pets are treated more like family, spending is shifting towards premium food, grooming, and lifestyle products. This premiumization reflects rising emotional attachment and a willingness to invest in pets' comfort and well-being



Pet humanization unlocks **premium categories (functional food, supplements, insurance, grooming spas)** and requires **brand trust-building akin to FMCG/infant care**

Emerging trends in Indian pet care market (2/2)

Cats and Urban Living

Cats make up 12% of the pet population and are growing faster than dogs. With urbanization and smaller apartments, they are practical companions needing less space and care. Their adaptability to indoor lifestyles makes them a natural fit for city households



Food & accessory players must tailor offerings to **cats as a high-growth sub-segment** (specialized cat food, litter, toys)

Post-COVID Acceleration

The pandemic, with lockdowns and increased loneliness, significantly fueled pet adoption, leading to a surge in demand for pet care services and products



Brands and retailers need to **lock in new pet parents early** with **starter packs, subscription models, and vet tie-ups** to sustain engagement

Peer/Network Effect

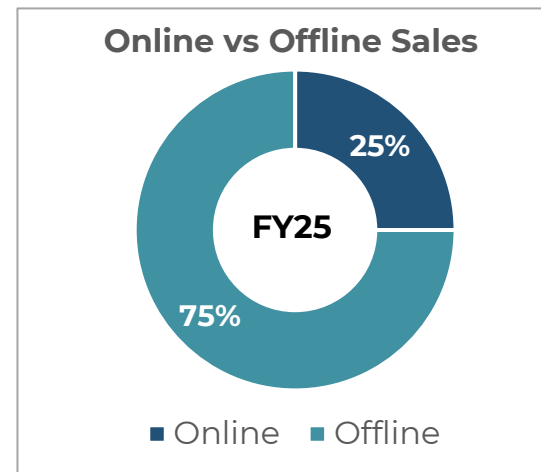
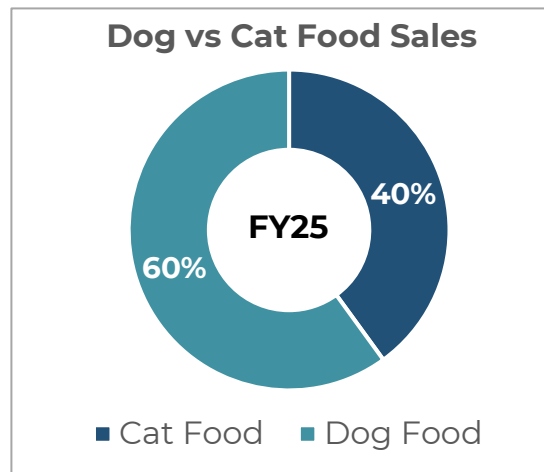
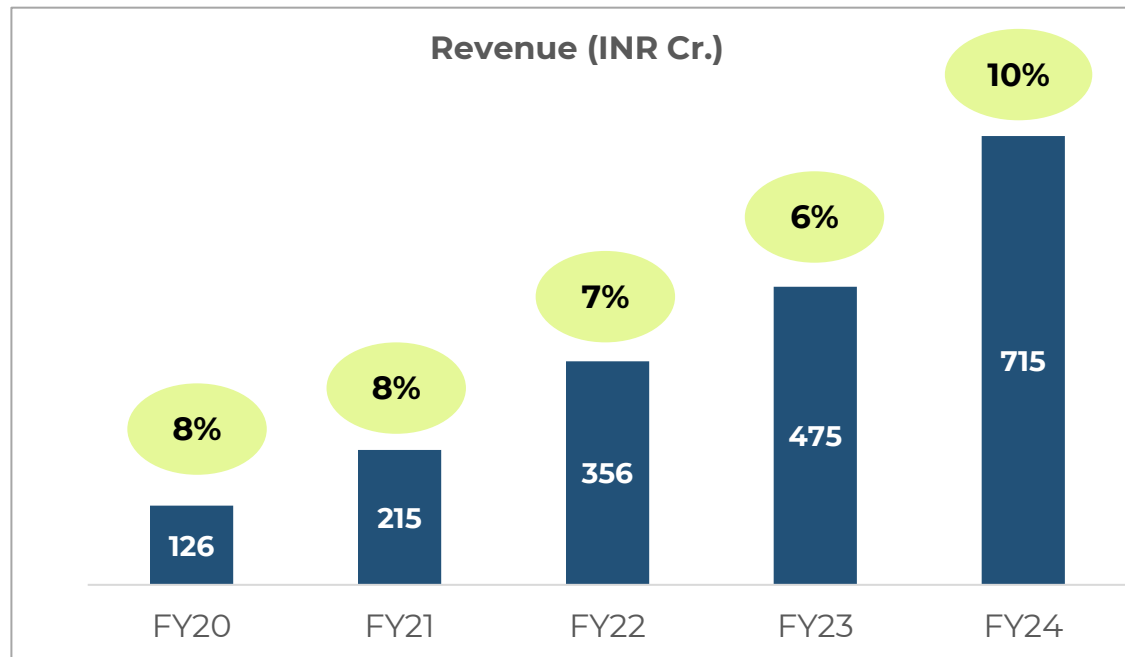
As pet ownership reaches a certain penetration point (estimated at 12-15%), the trend accelerates due to social influence (e.g., friends getting pets)



Players should **leverage community platforms, workplace tie-ups, and social content** to capture first-time adopters and build trust



Drools: Growth trajectory & strategic levers



Key Takeaways:

Strategic Execution and Distribution

- Began with veterinary clinics to build trust, later expanded to retail touchpoints
- Strong penetration into Tier-II & Tier-III cities, ignored by foreign brands
- Expanded to 40,000+ points of sale and quick commerce platforms for mass reach

Purpose-Driven Branding and Consumer Education

- Campaigns like “Back of the Pack” educating pet parents on nutrition labels
- Wide portfolio of 650+ SKUs (high-protein, prescription, vegan diets)
- Used celebrity endorsements to spread awareness & build trust



Other Portfolio Brands:

PUREPET

CANINE CREEK
ADVANCED PET NUTRITION

KITTY YUMS

SIGNATURE

MEAT UP

Digital Play

- With 25% of sales online, Drools' partnership with Amazon has been pivotal in reaching pet parents nationwide, from metros to smaller towns

 **Marketing Spend**



Private equity & strategic investments driving India's pet care market

Key Acquisitions			Notable Investments in the Recent Past			
Brand	Year	Details	Brand	Total Amt. Raised till Date (USD Mn)	Year of Latest Investment	Details
One Pet Stop	2025	Fredun Pharmaceuticals's entry into tech-enabled grooming services; cross-selling with Freossi products	Drools	60 ¹	2025	Nestlé SA acquired minority stake; amount undisclosed, elevating Drools to unicorn status (valuation > USD 1 billion)
Ayurvedet	2024	Zenex added Ayurvedic medicine portfolio; boosted R&D and brand reach	BhaoBhao	NA ²	2025	Raised \$0.2M from angel investors
Fur Ball Story (Cannis Lupus)	2024	Bagged \$0.4M from Emami, which acquired a 30% stake	Vetic	46.7	2025	Raised \$26.2M in Series C funding led by Bessemer Venture Partners, and four other investors
Capt Zack	2023	Wiggles acquired in 100% cash and equity deal this will help to grow brands presence	Supertails	31.5	2024	Secured \$15.3M in Series B from RPSG Capital Ventures & 13 others
			Justdogs	9.4	2023	Secured \$2.44M in Series A from Sixth Sense Ventures & Hansa Hasmukh Shah
			Heads Up For Tails	50	2021	Raised \$37M in Series A round lead by Peak XV Partners & Verlinvest



Pet care market: whitespaces & growth opportunities

Calorie Conversion Headroom

Only 3-5% of pets' nutritional needs are met by commercial packaged food in India, compared to 70% in the US and over 90% in Europe. This represents an enormous headroom for growth in the packaged pet food segment

First-Time Pet Parents

Over 90% of Indian pet parents are first-timers, unlike developed economies where most are experienced owners. This lack of prior experience drives a strong need for education, handholding, and accessible information

Penetration in Tier 2 and 3 markets

Distribution in Tier 2 and Tier 3 cities is hindered by highly fragmented last-mile delivery infrastructure, resulting in operational inefficiencies and inconsistent service reliability.

Rising service industry

Pet services are poised for strong growth by looking at the consumer spending behavior; but affordability and economic viability will be critical to driving widespread adoption in this cost-sensitive market.



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