

Addressing Regulatory Gaps and High GST, Rodl & Partner Paper Calls for Policy Reforms to Unlock India's \$2B Pet Food Industry

Category: Business

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Alongside World Food India 2025, organized by the Ministry of Food Processing Industries (MoFPI), Rodl & Partner released a landmark paper outlining strategic pathways to strengthen India's fast-growing pet food sector. MoFPI and EY also co-hosted a special session on **"India's Pet Food Industry: Scaling for Domestic & Global Growth"** at Bharat Mandapam, Pragati Maidan.



Panel Discussion on Indias Pet Food Industry

The paper highlighted that India's pet food market is expanding rapidly with the country's pet population at an estimated 42.2 million in 2024, projected to surpass 100 million by 2035. In revenue terms, the industry was valued at USD 720 million in 2024 and is expected to reach USD 2 billion by 2035. While dog food accounts for over 85% of the market, cat food is the fastest-growing segment, and e-commerce has become a key growth enabler.

Despite this momentum, the sector continues to operate under frameworks not designed for it. The paper calls for a harmonized and science-backed regulatory framework to enable trust, affordability, and access. Recommendations include rationalizing GST to align pet food with essential nutrition categories, adopting BIS standards as enforceable benchmarks, creating a single-window system for compliance, expanding accredited testing infrastructure, and ensuring consistent labelling and product standards across offline and online markets.

In his preface to the paper, **Dr. Umesh Kalahalli, Independent Veterinarian**, noted, *"As veterinarians, we see daily how nutrition impacts pet health. Many pets in India are still fed improvised diets that lack essential nutrients. Dedicated, enforceable regulations would give pet parents confidence, enable vets to guide responsibly, and ensure pets receive the same quality of nutrition as globally."*

The panel discussion at World Food India brought together leading voices from across the industry, including Salil Murthy, Managing Director, Mars Petcare India; Satinder Singh, Managing Director, Royal Canin; Rinka Banerjee, Founder & CEO, Thinking Forks Consulting Pvt. Ltd; Ram Soni, Partner, Food & Agriculture, Praxis Global Alliance; and Abhishek Agarwal, Founder & CEO, Innomalous, moderated by Ms. Pallavi Anand, Business Head, Nestl Purina Petcare – South Asia Region.

Salil Murthy, Managing Director, Mars Petcare India said, *"India is home to over 35 million pets today, a number set to double within the next five to seven years. Yet, penetration of manufactured pet food remains below 10% in Indian households, compared to near-universal adoption in developed markets. Unlocking the true potential of India's pet food sector requires three structural shifts: First, a responsible and science-aligned regulatory framework to build consumer trust and ensure transparency. Second, rationalizing the current 18% GST on pet food which is essential nutrition – an anomaly while other pet care items like pet shampoos are now taxed at just 5%. Third, a nationwide effort to raise awareness so that pet parents move from home-cooked meals to complete, science-backed nutrition that ensures a longer, healthier life for pets. And finally, recognizing the sector's ability to create jobs and value across manufacturing, retail, veterinary care, and allied services. Together, these steps can accelerate India's journey to becoming a truly better nation for pets and a future export hub for pet food."*

Satinder Singh, General Manager, Royal Canin, added, *"The*

sector is already a USD 720 million industry, growing at double digits annually. Despite this growth, pet food is still seen as discretionary and lacks a clear regulatory identity in India. Giving the sector the recognition it deserves through dedicated regulations will provide clarity for companies and veterinarians, strengthen India's Make in India initiative and establish the country as a key export hub for global markets, as well as reassure millions of pet parents through consistent, quality, safe, and hygienic food for cats and dogs. When policies treat pet nutrition as essential rather than optional, India will be able to close the nutrition gap and align with global best practices."

On the Day 1 of the WFI event, Ministry of Food Processing Industries highlighted the pet food sectors strategic alignment with the **Make in India** initiative. At the CEO roundtable, the Ministry called for a **harmonized, science-backed regulatory framework** that would secure **nutrition and consumer trust**. The discussion reinforced that regulation must serve as an enabler, supporting balanced growth and positioning India more confidently in the global pet food landscape.

About World Food India 2025

World Food India is the Ministry of Food Processing Industries' flagship international event, serving as a premier platform for stakeholders across the food value chain to connect, collaborate, and invest in India. Following successful editions in 2017, 2023, and 2024, the 4th edition will be held from 25-28 September 2025 at Bharat Mandapam, New Delhi.

