

Pet food on Amazon India sells at least ₹212.2 crore a year. Two companies take 76% of it.

PET FOOD · AMAZON INDIA · READ 2026-10-16

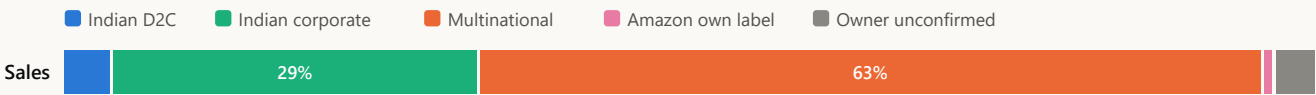
Indian D2C pet brands are easy to find. On Zepto they are 22.4% of the pet food a dark store carries. We wanted to know how much of the money they take. We read every product Amazon India shows for six dog and cat food searches, 793 listings, and opened every one that shows sales.

The measure. Sales on Amazon India: the “bought in past month” figure at its lower bound, times the product-page price, times twelve. Read on 2026-10-16, eight days after Amazon’s festive sale began.

1 · THE SHORT VERSION

- Pet food on Amazon India sells at least **₹212.2 crore a year**, about 286,150 packs a month.
- **Mars takes 49.3%** through 7 brands, led by Royal Canin. **Drools, Indian-owned, takes 27.0%** through 6 brands. Together they take 76.3%.
- **Indian D2C brands take 3.9%** of the money, up to 7.3% if every brand whose owner is not confirmed is D2C. On Zepto they are 22.4% of the products.
- On dry food, the median D2C pack costs **₹680 a kg**. Drools’ brands and the other Indian companies sit at ₹241, the multinationals at ₹840. D2C is not the premium end. It is the middle.

2 · TWO COMPANIES TAKE MOST OF THE MONEY

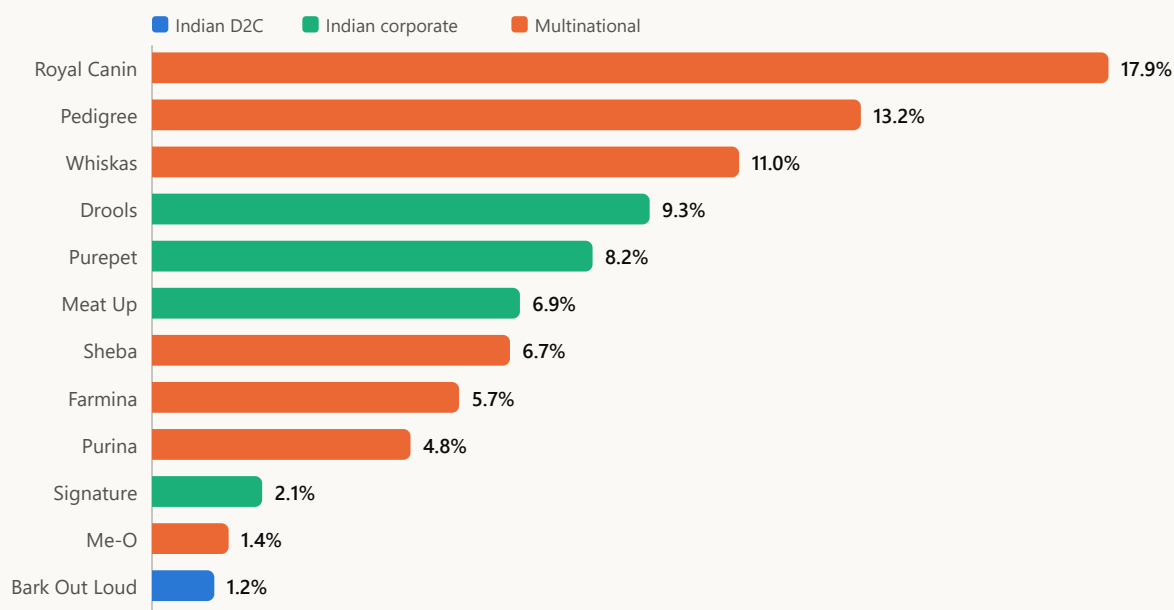


COMPANY	OWNER GROUP	BRANDS ON THIS SHELF	SHARE OF SALES	SALES A YEAR, AT LEAST
Mars	Multinational	Chappi, Greenies, Pedigree, Royal Canin, Sheba, Temptations, Whiskas	49.3%	₹104.6 crore

Drools	Indian corporate	Drools, Kitty Yums, Meat Up, Purepet, Signature, Vet Pro	27.0%	₹57.2 crore
Farmina	Multinational	Farmina	5.7%	₹12.2 crore
Nestlé	Multinational	Purina	4.8%	₹10.3 crore
Perfect Companion (Thailand)	Multinational	Me-O, SmartHeart	1.9%	₹4.1 crore
Bark Out Loud	Indian D2C	Bark Out Loud	1.2%	₹2.5 crore
Kennel Kitchen	Indian D2C	Kennel Kitchen	0.9%	₹2.0 crore
Chip Chops	Indian corporate	Chip Chops	0.9%	₹1.9 crore

Mars sells under 7 names on this shelf: Royal Canin, Pedigree, Whiskas, Sheba, Temptations, Chappi, Greenies. Drools, which is Indian-owned, sells under 6: Drools, Purepet, Meat Up, Signature, Vet Pro, Kitty Yums. Read one name at a time, Drools looks like several mid-sized brands. Counted as one company, it is the second largest seller on the shelf, at about half of Mars.

3 · THE BRANDS



BRAND	OWNER	LISTINGS THAT SELL	MEDIAN PRICE	SHARE	SALES A YEAR, AT LEAST
Royal Canin	Multinational	43	₹1,830	17.9%	₹37.9 crore
Pedigree	Multinational	27	₹623	13.2%	₹28.1 crore

Whiskas	Multinational	23	₹894	11.0%	₹23.3 crore
Drools	Indian corporate	47	₹277	9.3%	₹19.7 crore
Purepet	Indian corporate	27	₹252	8.2%	₹17.5 crore
Meat Up	Indian corporate	16	₹395	6.9%	₹14.6 crore
Sheba	Multinational	12	₹540	6.7%	₹14.2 crore
Farmina	Multinational	28	₹2,290	5.7%	₹12.2 crore
Purina	Multinational	23	₹558	4.8%	₹10.3 crore
Signature	Indian corporate	17	₹391	2.1%	₹4.4 crore
Me-O	Multinational	11	₹390	1.4%	₹3.0 crore
Bark Out Loud	Indian D2C	18	₹354	1.2%	₹2.5 crore

The top three brands take 42.1%. Royal Canin is first, ahead of Pedigree, at a median listing of ₹1,830 against ₹623.

4 · ON THE SHELF, NOT IN THE MONEY

The same question asked of two surfaces gives two different answers. On Zepto (read 2026-09-08, six dark stores, 652 products) Indian D2C brands are 22.4% of the products. On Amazon they are 3.9% of the sales. The two are different measures and are never added. They can be read side by side.

OWNER GROUP	ZEPTO: SHARE OF PRODUCTS	AMAZON: SHARE OF SALES
Indian D2C	22.4%	3.9%
Indian corporate	25.3%	29.3%
Multinational	35.7%	62.5%
Owner unconfirmed	16.6%	3.4%

The D2C brands that sell on Amazon:

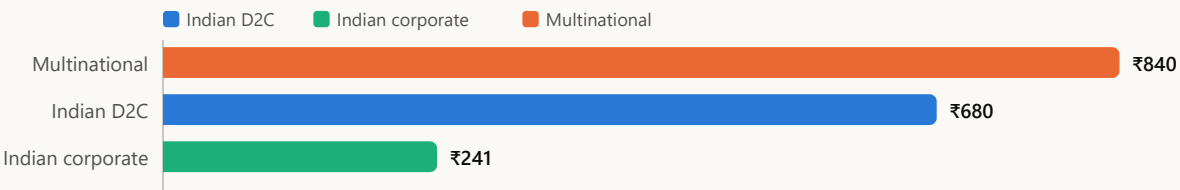
BRAND	LISTINGS THAT SELL	MEDIAN PRICE	SHARE OF SALES
Bark Out Loud	18	₹354	1.2%
Kennel Kitchen	11	₹395	0.9%

Heads Up For Tails	22	₹255	0.7%
Smylo	5	₹945	0.6%
Henlo	5	₹315	0.4%

Treats are where they hold most: 14.4% of treat sales, against 2.3% of dry food sales.

5 · THE PRICE LADDER

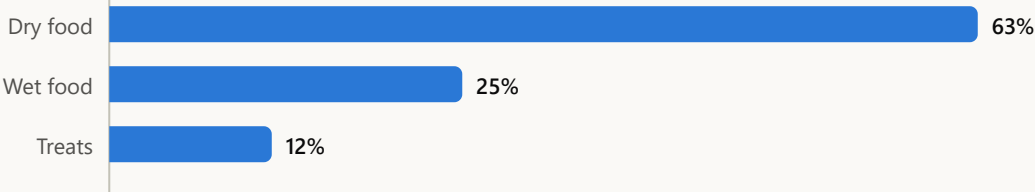
Median price per kg, dry food only, in rupees



OWNER GROUP	DRY FOOD, PER KG	PACKS PRICED	ALL FOOD, PER KG	SHARE OF SALES
Multinational	₹840	103	₹625	62.5%
Indian D2C	₹680	13	₹1,750	3.9%
Indian corporate	₹241	74	₹340	29.3%

On dry food, a D2C pack costs 2.8 times the Indian corporate median and less than the multinational median. Royal Canin and Farmina hold the top of the ladder; Drools, Purepet and Meat Up hold the bottom. A D2C brand on Amazon sells against both.

6 · WHAT SELLS



Amazon’s own category decides the type and the animal, not the title. Dry food is 62.7% of the money, wet food 25.5% and treats 11.7%. Dogs take 56.0% and cats 44.0%. Wet food is 85% multinational.

7 · WHAT SHARE OF EACH COMPANY’S SALES THIS IS

Each company's sales on this shelf, beside what it reports for its whole business.

COMPANY	REPORTED REVENUE	ON THIS SHELF	SHARE OF REVENUE
Drools (FY25)	₹932 crore	₹57.2 crore	6.1%
Heads Up For Tails (run rate, 2026)	₹400 crore	₹1.6 crore	0.4%

This shelf is about 6% of Drools' FY25 revenue. For Heads Up For Tails it is about 0.4% of the run rate it reports, which includes its own stores and its accessories. Mars reports its Indian pet business inside a company that also sells chocolate, so it has no figure to set beside this one.

Drools: Inc42, from filings. Heads Up For Tails: a run rate reported to Entrackr.

8 · WHAT WE PREDICTED

We wrote down 8 predictions before we read the shelf. 4 of 8 held.

WE SAID	WE FOUND	
The shelf sells ₹150 to ₹400 crore a year	₹212.2 crore	Right
The largest brand is Pedigree (Mars)	Royal Canin, 17.9%	Wrong
Multinationals take 45 to 65%	62.5%	Right
Indian D2C brands take 8 to 20%	3.9% (up to 7.3%)	Wrong
Dog products carry over 70% of the money	56.0%	Wrong
Treats carry under 25% of the money	11.7%	Right
The top three brands take over 50%	42.1%	Wrong
D2C costs over twice the Indian corporate price per kg	₹1,750 against ₹340 (5.1x); dry food ₹680 against ₹241 (2.8x)	Right

9 · METHOD

Amazon India, six searches, three pages each: dog food, puppy food, cat food, kitten food, dog treats and cat treats. We counted only Amazon's own search results and opened the product page of every listing that shows a sales figure.

The shelf is everything Amazon files under Pet Supplies, then Dogs or Cats, then Food or Treats. Dental chews and supplements that the searches also returned (₹5.6 crore a year) sit under Health Supplies and are not on it.

AMAZON CATEGORY	LISTINGS THAT SELL	SALES A YEAR, AT LEAST	
Dogs › Food › Dry	120	₹82.7 crore	On the shelf
Cats › Food › Dry	102	₹50.3 crore	On the shelf
Cats › Food › Wet	69	₹37.7 crore	On the shelf
Dogs › Food › Wet	28	₹16.4 crore	On the shelf
Dogs › Treats › Cookies, Biscuits & Snacks	86	₹14.7 crore	On the shelf
Cats › Treats › Snacks	35	₹3.2 crore	On the shelf
Cats › Treats › Pastes	10	₹1.9 crore	On the shelf
Dogs › Treats › Rawhide	15	₹1.9 crore	On the shelf
Dogs › Treats › Bones	6	₹1.7 crore	On the shelf
Dogs › Treats	7	₹0.7 crore	On the shelf
Dogs › Treats › Jerky	9	₹0.7 crore	On the shelf
Dogs › Food	1	₹0.2 crore	On the shelf
Cats › Treats	3	₹0.1 crore	On the shelf
Cats › Food	1	₹0.1 crore	On the shelf
Cats › Treats › Catnip	1	₹0.0 crore	On the shelf
Dogs › Health Supplies › Dental Care	9	₹4.9 crore	Left out

Dogs › Health Supplies › Bone & Joint Health Supplements	1	₹0.6 crore	Left out
Cats › Health Supplies › Dental Care	2	₹0.1 crore	Left out
Dogs › Health Supplies › Supplements & Vitamins	1	₹0.0 crore	Left out

Sales are Amazon's "bought in past month" figure at its lowest value, times the price on the product page, times twelve. A company that sells under several names is shown as one company and as its brands. Where a store sells another company's product, the product's brand counts. Price per kg comes from the pack size in the title; a stated total wins, and pieces inside one pack are never counted as packs. Every brand's owner is researched by hand.

We read shelves like this one by category, by platform and by city, and read them again to show what moved. If you are building in pet care, **book a discovery call at www.impuls8.com/enterprise**.

impuls8 · read 2026-10-16 · Amazon India · 793 listings, 506 with sales · Zepto column read 2026-09-08 · every figure is generated from the read and checked by a second script.