

Marketing Strategies of Domestic Startups in the Pet Food Industry: Focusing on Human-Grade Products

국내 스타트업의 펫 푸드 마케팅 전략: 휴먼그레이드(Human-Grade) 제품 중심으로

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Abstract: The growing recognition of pets as integral family members has driven significant expansion in the premium pet food market. (1) Background/Purpose: This study explores the strategic importance of human-grade pet food products in the domestic South Korean market, a rapidly growing segment valued at approximately \$6.2 billion in 2022 and projected to reach \$15.2 billion by 2032 at an annual growth rate of 9.5%. The study investigates how domestic startups can achieve sustainable competitiveness against large corporations and dominant imported brands through differentiated marketing strategies. (2) Methodology/Approach: A qualitative research design was employed, combining literature review, case-study analysis applying STP (Segmentation, Targeting, Positioning) and 4P (Product, Price, Place, Promotion) frameworks, and a semi-structured in-depth interview with the CEO of the startup RichzBOX. Three companies were selected as cases: Harim Pet Food (large corporation), WOORIWA (mid-sized company), and RichzBOX (startup). (3) Findings: Harim Pet Food leverages its extensive distribution network and brand reputation for wellness-focused strategies. WOORIWA specializes in functional pet food addressing specific health conditions such as allergy prevention and weight management. RichzBOX demonstrates that startups can achieve market differentiation through personalized subscription services, smart factory-based quality management, certified human-grade ingredients, and social responsibility branding. No single strategy dominates—each firm's approach is aligned to its resource base and target consumer segment. (4) Originality/Value: The study provides actionable marketing strategy frameworks for domestic pet food startups and identifies policy gaps—particularly the absence of clear human-grade product criteria under the Korean Feed Management Act—whose resolution would strengthen both consumer trust and global competitiveness.

Keywords: Pet Food Marketing; Human-Grade Products; Pet Humanization; Premium Pet Food; Startup Strategy; STP Analysis; 4P Framework; Consumer Trust; Smart Factory; ESG; Subscription Service; Digital Marketing; South Korean Pet Market; Global Market Expansion; AAFCO Standards

1. Introduction

1.1 Research Background

In contemporary society, pets have evolved from animals kept for pleasure to full family members. This shift, combined with demographic factors such as low birth rates, rising single-person households, and an aging population, has catalyzed robust growth in the pet industry. According to Bloomberg Intelligence, the global pet market is projected to reach approximately \$493 billion by 2030. The domestic South Korean market is expected to grow from approximately \$6.2 billion in 2022 to \$15.2 billion by 2032, at an annual growth rate of 9.5%.¹

The 'pet humanization' trend—treating pets as family members or companions—has fundamentally altered consumer spending. Pet-related expenditure has shifted from basic survival costs to wellness-focused preventive care and premium services, influencing sectors from pet food and pet tech to specialized financial products. As of 2020, approximately 3.129

¹농림축산식품부(2023), 2022년 동물보호에 대한 국민의식조사 결과; 반려동물 연관산업 육성대책 세부내용.

million households, representing approximately 14% of all Korean households, were raising pets.² However, the domestic pet food industry faces significant policy gaps compared to the U.S. and EU, particularly regarding product classification, labeling standards, evaluation systems, and R&D infrastructure.³ In late 2023, the Ministry of Agriculture, Food and Rural Affairs initiated discussions on a 'Policy for Fostering the Pet-Related Industry,' signaling government recognition of these gaps. The COVID-19 pandemic accelerated these trends, increasing pet adoption rates and time spent with pets, thereby intensifying consumer interest in pet health and quality of life. A 2022 survey by the Ministry of Agriculture found that monthly pet care costs average approximately KRW 150,000 per animal, with consumers in their 20s spending the highest amounts at approximately KRW 210,000 per month.⁴ In the premium segment, human-grade products have emerged as a critical category. Human-grade pet food refers to products manufactured with ingredients and processes meeting the standards applicable to human consumption (AAFCO). In 2021, domestic brands held approximately 47% of the pet food market versus 53% for imports—with imported premium-grade products commanding as much as 72% of that segment.⁵ A high-profile 2024 cat fatality case involving OEM-produced feed further underscored the urgent need for quality assurance and transparency.⁶

1.2 Research Objectives

This study aims to: (1) comparatively analyze the marketing strategies of human-grade pet food companies differentiated by size—Harim Pet Food (large corporation), WOORIWA (mid-sized company), and RichzBOX (startup); (2) systematically analyze environmental factors facing domestic startups and propose strategic marketing directions for successful market growth; and (3) present specific, actionable strategic recommendations for domestic startups to achieve sustainable competitiveness in both domestic and global markets, including international certification adoption, quality management enhancement, digital marketing utilization, and transparency-based consumer trust building.

1.3 Research Methods

This study employs a qualitative research methodology incorporating three complementary approaches. First, a literature review analyzes the growth background of the domestic pet food market and wellness-oriented consumer trends using existing research and industry reports. Second, case-study analysis compares the STP strategies (Segmentation, Targeting, Positioning) and 4P strategies (Product, Price, Place, Promotion) of Harim Pet Food, WOORIWA, and RichzBOX in depth. Third, a semi-structured in-depth interview was conducted with the CEO of RichzBOX covering the founding background, human-grade product development processes, consumer targeting strategies, competitive differentiation, and growth plans. The findings from these three approaches are synthesized to identify key factors for sustainable competitive advantage in the premium pet food market.

2. Theoretical Framework and Environmental Analysis

2.1 Market Status and Growth Trends

2.1.1 Market Overview

The domestic pet food market, while primarily domestically oriented, has been continuously expanding alongside the increase in pet-owning households. As of 2022, the domestic market size is estimated at approximately \$6.2 billion, with projections to reach \$15.2 billion by 2032—an annual growth rate of approximately 9.5%.⁷ Table 1 illustrates the growth trajectory of domestic pet-owning households and pet populations, which serve as primary drivers of market expansion. A 2024 PetP application customer survey found that food and snacks account for more than 50% of pet care spending, and that product reviews and ingredient information outweigh price as key purchasing criteria.⁸

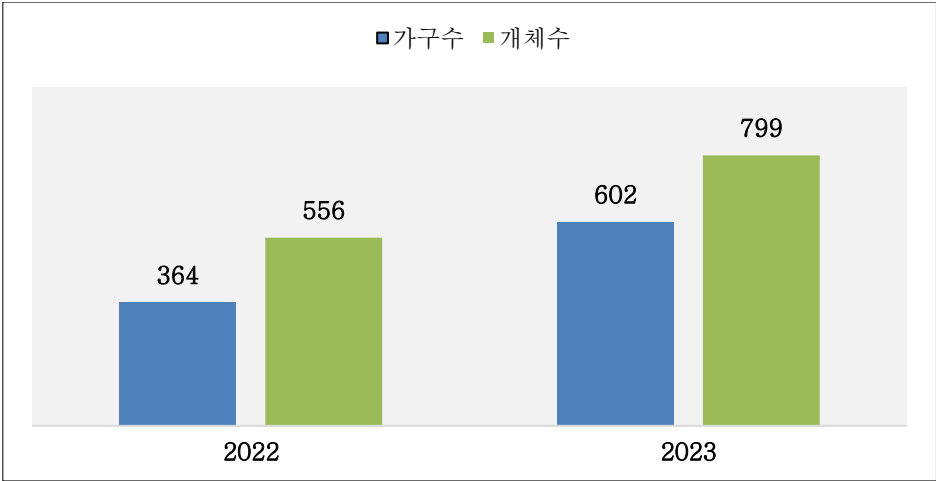
Table 1. Domestic Pet-Owning Households and Pet Populations (Dogs and Cats)

²통계청(2022), 2021년 인구주택총조사 결과.

⁵데일리벳(2022), 국내 반려동물 사료 시장 규모 1.5조원...점유율 1위는 로얄캐닌; 이데일리(2022), 수입 의존 '기능성 펫푸드'...이젠 우리 농산물로 만들어요.

⁶중앙일보(2024.4.17.), [단독]"고양이, 다리 절다 죽었다"...의심 사료 수거해 조사.

⁸펫피 Petp(2024), 24년 펫트렌드 고객 설문조사, ㈜디팡오투오.



Source: Ministry of Agriculture, Food and Rural Affairs (2023). Unit: 10,000.

The market is characterized by intense competition between domestic and imported brands. As of 2021, domestic brands held approximately 47% of the market versus 53% for imported products. Online channels account for 78% of total domestic pet food sales—significantly higher than the global average of 39%—with Naver and Coupang serving as primary online distribution channels.⁹

2.1.2 Wellness-Oriented Consumer Trends

The shift in pet perception drives wellness-centered consumption. Post-COVID-19, increased time with pets and longer pet lifespans have intensified demand for quality nutrition. The 2023 Pet Food Forum found that pet guardians prioritize responsibility and trustworthiness, which translate into preferences for premium wellness-oriented products. Human-grade products—offering ingredient transparency, organic and natural materials, and no synthetic additives—represent the vanguard of this trend.

2.1.3 Consumer Profile Analysis

MZ Generation (Millennials & Generation Z) consumers exhibit distinctive consumption patterns, including active use of personalized subscription services from startup brands.¹⁰ Higher income levels correlate with greater demand for premium products. The online purchasing preference is particularly pronounced: 78% of domestic pet food sales occur online.¹¹ These consumer characteristics have intensified B2C market competition and driven companies to offer products closely aligned with consumer values and needs.

2.2 Domestic Human-Grade Pet Food Companies

Despite the rapid growth of the domestic human-grade pet food segment, reliance on imported products remains high—premium-grade imports account for approximately 72% of that sub-market.¹² Domestic companies are attempting to close this gap through premium product development and certification strengthening. WOORIWA and Harim Pet Food hold 3rd and 5th place respectively in the domestic dog food market.¹³

Among startups, RichzBOX has pursued an innovative approach using only additive-free, premium-grade ingredients from the outset, building emotional bonds with consumers through personalized pet food services. The human-grade product category has emerged as a positive signal of increasing domestic brand market share against imports, as domestic consumers are increasingly prioritizing safety and quality.

3. Materials and Methods

This study adopted a qualitative case-study research design. Three companies were purposively selected to represent distinct organizational tiers in the domestic human-grade pet food market: Harim Pet Food (large corporation, established

⁹데일리벳(2024.5.20.), 국내 펫푸드 시장 규모 9천억원...온라인 유통 비율 78%.

¹⁰삼성KPMG 이슈모니터 제164호(2024), 다가오는 펫코노미 2.0시대, 펫 비즈니스 트렌드와 새로운 기회.

¹³데일리벳(2023.7.13.), 국내 반려동물 사료 브랜드 1위는 개·고양이 모두 '로얄캐닌'.

2017, 2023 revenue KRW 45.7 billion), WOORIWA (mid-sized company, expanded through U.S. ANF acquisition in 2019), and RichzBOX (startup, established 2018). Each case was analyzed through the STP and 4P marketing strategy frameworks.

Data sources include: (1) corporate websites, press releases, and official marketing materials; (2) industry reports from the Ministry of Agriculture, Food and Rural Affairs; Samjung KPMG; Nielsen IQ; and Euromonitor; (3) academic journal articles; (4) media reports; and (5) a semi-structured in-depth interview conducted with RichzBOX CEO Park Jin-young covering founding philosophy, human-grade product development, consumer strategy, competitive differentiation, and growth plans. Analysis was conducted through systematic comparison across STP and 4P dimensions, followed by cross-case synthesis to identify best practices and strategic recommendations.

4. Results: Case Analysis

4.1 Harim Pet Food: Strategic Analysis

Harim Pet Food, a subsidiary of the agricultural conglomerate Harim Group, was established in 2017. It has built its brand around the positioning of '100% Human-Grade, 0% synthetic preservatives,' becoming Korea's first pet food company to apply human-consumption-grade standards to both ingredients and manufacturing processes. The company achieved 2023 revenues of KRW 45.7 billion.¹⁴

4.1.1 STP Strategy

Segmentation: Harim Pet Food segments the market based on pet life stage (growth, senior), owner income level (high-income and middle-income premium consumers), and pet lifestyle (activity level and urban living environment). Age-specific products include high-nutrition feed for growing pets and functional joint-health formulas for senior animals.

Targeting: The primary target is wellness- and health-conscious MZ Generation consumers who demonstrate a high willingness to spend on premium products and are comfortable with digital technology and personalized experiences.

Positioning: The brand is positioned around the message of 'safe pet food that humans could also eat,' extending meal-giving beyond mere sustenance to a lifestyle concept of shared dining between guardians and pets.¹⁵

4.1.2 4P Strategy

Product: All products are nutritionally designed and contain functional ingredients such as glucosamine for joint health and omega fatty acids for coat management. The company offers customized product and feeding-volume recommendations based on pet weight, age, and activity level.

Table 2. Harim Pet Food: Major Brands

브랜드	제품	주요 특징점	비고
가장 맛있는 시간 30일		• 생산일로부터 30일까지 사료의 골든타임 제공 • 100% 휴먼그레이드(Human-Grade) 식재료 및 화학첨가물 무첨가 • 당일 생산·배송 원칙 • 반려동물 정보에 따른 제품 및 급여량 제안	하림펫푸드 공식몰 자사몰 판매
The Real (더:리얼)		• 100% 휴먼그레이드(Human-Grade) 식재료 • 육분이 아닌 하림그룹 공급 엄선 국내산 생고기 사용 • 천연 알러지 유발 원료 제외	베트남·일본 수출 (2021~)

¹⁴하림펫푸드 공식 홈페이지(<https://harimpetfood.com/>); 매일경제(2023.5.4.), 하림펫푸드, 출범 5년만에 매출 366억원 '사상최대'.

¹⁵동아비즈니스리뷰 320호(2021), SR4. 하림펫푸드의 소비자 관점 디자인싱킹 전략.
https://dbr.donga.com/article/view/1202/article_no/10032/ac/magazine

밥이보약		• 식자재 효능에 따른 제품구성 (예: 튼튼한 관절, 알맞은 체중, 빛나는 피모) • 합성보존료·감미료 무첨가 • 100% 휴먼그레이드(Human-Grade) 식재료	기능성 라인업
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Source: Harim Pet Food official website (<https://harimpetfood.com/>).

Price: Products are priced at approximately KRW 20,000–40,000 per kilogram, approximately 1.5–2× higher than standard feed, reflecting premium quality and safety positioning.

Place: An omni-channel strategy integrates online platforms (Naver Smart Store, Coupang, Market Kurly, own-brand mall), offline channels (large supermarkets, premium pet shops, department stores), and veterinarian recommendation programs. Global distribution was initiated with exports to Vietnam (2021) and Japan through the 'The Real' series.¹⁶

Promotion: Digital marketing through YouTube and Instagram delivers emotionally resonant lifestyle content. Notable campaigns include '더리얼로 진짜 가족이 됩니다' (Become a Real Family with The Real), the '더리얼로우 레스토랑' ' campaign, product trial programs (sample kits, '100 Dogs 100 Days Trial Program'), factory experiential tours, regular subscription services with discounts, and offline pop-up stores and pet exhibitions.¹⁷

4.2 WOORIWA: Strategic Analysis

WOORIWA is a mid-sized company that has established an independent market position through a premium strategy focused on functional product development. Following the acquisition of the U.S. brand ANF in 2019, the company has grown into a comprehensive pet life solution provider offering pet food, pet services, and an online mall. It was the first in the industry to implement a 'Full Product Quality Responsibility System.'

4.2.1 STP Strategy

Segmentation: The market is segmented based on health-problem awareness: consumers seeking solutions for allergies, digestive issues, and weight management. High-income and middle-income consumers receive differentiated product tiers.

Targeting: The primary target consists of health-sensitive, premium-product-oriented consumers in the middle and high-income brackets who are willing to invest in pet wellbeing and view pets as family members.

Positioning: WOORIWA positions itself as 'customized pet food for pet health,' emphasizing functional differentiation that supports health management and wellbeing through tailored nutritional solutions.

4.2.2 4P Strategy

Product: The product portfolio includes low-fat dietary formulations, digestive function improvement products, and balanced nutrition for both adult and puppy stages. WOORIWA introduced the world's first twin-extruding equipment application in Korea, achieving harmful microorganism elimination and increased digestive utilization through high-temperature, high-pressure heat treatment. Certifications include HACCP, organic certification, and quarantine facility certification.

Table 3. WOORIWA: Major Brands

브랜드	제품	주요 특징점	비고
ANF 6Free		• 6가지 유해성분 무첨가 (유전자변형물질, 항생제, 살충제, 호르몬제, 합성착색료, 합성착향료) • 체력·피모·면역 기능성 • AAFCO 반려동물 필수 영양소 기준 준수	국내 최초 6Free 기준 적용

¹⁶이뉴스투데이(2022.2.9.), 펫푸드, 프리미엄 전략 통했나...해외수출 '청신호'.

¹⁷매일경제(2023.5.4.), 하림펫푸드, 출범 5년만에 매출 366억원 '사상최대'; 팜뉴스(2024.3.19.), 하림펫푸드, '더리얼로우 레스토랑' 인증이벤트 진행.

웰츠 (Wealtz)		• 원육 포함 육류 80%의 저지방·고단백·고섬유소·체중관리용 그레인 & 글루텐 프리·AAFCO 기준 준수, 이리온 수의사 레시피	체중 관리 특화 라인
이즈칸 (iskhan)		• 국내 최초 생육 펫 푸드·저알러지, 높은 단백질 소화율	아성다이스 입점 (2023)

Source: WOORIWA official website (<https://www.wooriwa.com/>); Irion Mall (<https://www.irionmall.co.kr/>).

Price: Products are priced at approximately KRW 11,000–20,000 per kilogram, positioned as a health management product rather than mere feed, offering a value-for-money perception among health-conscious consumers.

Place: Online channels include Naver Smart Store, SSG.com, and Market Kurly; the brand's own 'Irion Mall' operates a customized recommendation system based on purchase history data. Offline channels prioritize specialized pet shops and veterinary clinics over large supermarkets. In 2023, WOORIWA entered Daiso stores. Globally, WOORIWA has expanded to 8 Asian countries including Taiwan, Japan, and Vietnam, recording exports exceeding \$5 million for two consecutive years.¹⁸

Promotion: WOORIWA conducted live manufacturing facility (PetFood Kitchen) tours via Naver Live Shopping to transparently demonstrate hygiene and safety following the 2023 cat fatality incident.¹⁹ The brand runs campaigns under the slogan 'Harmless to you, harmless to what I give,' collaborating with Instagram illustrators and YouTube influencers. A 100-won functional sample kit enables pre-purchase palatability and allergy testing. A '7-day trial program' allows consumers to experience product effects for specific health issues within a short period.

4.3 RichzBOX: Strategic Analysis

RichzBOX was founded in 2018 with a personalized subscription service for premium pet snacks. Built on the founding philosophy of 'For all the Riches of the world,' the company uses only antibiotic-free, organic, and pesticide-free certified ingredients. In its first three years, the company concentrated on technology acquisition and facility construction, resulting in the first smart factory system among domestic pet startups and achievement of HACCP certification, U.S. FDA manufacturing facility certification, and manufacturing process patents.²⁰ The company donates 20% of monthly operating profit to stray dog shelters.

4.3.1 STP Strategy

Segmentation: RichzBOX CEO Park Jin-young noted in interview: "Premium pet food is very similar to the infant food market. Consumer behavior is increasingly converging. We benchmarked individualized nutritional design and ingredient transparency from the premium organic infant food industry, and developed premium snacks tailored to pet health needs." The company targets: (1) consumers prioritizing nutritional balance and ingredient freshness/safety; (2) middle and high-income premium product consumers; (3) busy working women preferring convenient subscription-based personalized snacks.

Targeting: The primary target is working women who prioritize pet health and wellbeing, are willing to invest in premium products, and prefer convenient delivery services. These consumers trust the brand's personalized subscription service, HACCP and FDA-certified manufacturing, and antibiotic-free organic ingredients.

Positioning: RichzBOX is positioned as 'a healthy and trustworthy premium pet food for pets like family members.' Its

¹⁸데일리벳(2024.12.19.), 우리와, 펫푸드 기업 유일 K-Food+ 수출탑 수상..해외 진출 성과 인정받아; 네이트뉴스(2024.12.23.), 우리와, 수출 1000만달러 정조준.

¹⁹비즈워치(2023.4.18.), [르포] 우리와 펫푸드 키친 가봤더니.

²⁰뉴스와이어(2020.2.4.), 리치즈박스, 업계 최초 영양분 균형까지 맞춘 강아지 동결건조 간식 개발; 뉴스와이어(2020.3.19.), 리치즈박스, 반려동물 스타트업 최초 스마트공장 구축 첫발.

smart factory-based quality management, highest-grade ingredients, barcode traceability systems, and social responsibility branding combine to deliver the message: 'A healthy and reliable choice for family-like pets, even amid a busy life.'

4.3.2 4P Strategy

Product: All products are 100% in-house developed using high-grade, certified ingredients. Calcium-to-phosphorus ratios are adjusted to AAFCO standards. Jeju Hallasan horse (한라마) not used for racing and raised in verified environments is featured in the horse meat product line. A steam-before-freeze-drying process minimizes nutrient loss while maximizing absorption rates. Retort sterilization equipment prevents contamination, and a barcode tracking system ensures full supply chain transparency.²¹

Table 4. RichzBOX: Major Brands

브랜드	제품	주요 특징점	비고
야미(Yummy) 시리즈		• 돼지·오리·닭 무항생제 육류 및 치즈·유 기능 채소·해조류 사용 • 동결건조 공법 제조로 영양손실 최소화	대표 주력 제품라인
말고기 / 비프 베이스 틱		• 사육 환경 검증된 농장의 한라마 선별 • 말고기 86% + 채소 14%로만 제조	제주산 한라마 특화
미니 파티팩		• 원육 80~90% + 최상급 인증 채소만 사 용 • 방부제·글루텐·그레인 Free • 미니사 이즈로 휴대성 증대	2024 MINI 시리즈 론칭

Source: RichzBOX official website (<https://richzbox.co.kr/main/index.php>).

Price: Based on early customer feedback on prototypes, a consumer-centered pricing strategy was adopted. The flagship freeze-dried snacks are priced at KRW 12,500–23,000 per 100 grams.

Place: Approximately 90% of distribution occurs through B2B channels including premium specialist pet shops and specialized shopping malls (Fitpet Mall, Godangdo, About Pet). B2C channels through the company website operate through pre-order purchase and regular sales, though B2C expansion is currently limited due to small-batch manufacturing constraints.

Promotion: Initial promotion centered on B2C subscription services and digital marketing. The initial curation subscription service offered personalized snacks based on the pet's age, breed, medical history, allergies, and preferred ingredients. A 'relay coupon' recommendation system and gifting function contributed to new customer acquisition.²²

Table 5. RichzBOX Curation Service Package Components

No.	구성품	내용
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²¹리치즈박스 공식 홈페이지(<https://richzbox.co.kr/main/index.php>).

²²MOGOO, 세상 모든 구독(<https://modugoodok.tistory.com/2>).

1	1:1 맞춤형 펫 푸드	화학첨가물 Free, 내추럴 메이드 간식
2	친환경 노즈워크 팩	전용 간식과 컵으로 더욱 편리한 노즈워킹
3	유기견 후원 굿즈	구매자에게 유기견 후원증 발급
4	우리 아이 알림장	올바른 펫 푸드 급여를 위한 식재료 정보
5	릴레이 쿠폰	추천인에게 제공되는 혜택 및 후원금을 통한 선순환 메시지 전달

Source: MOGOO – All Subscriptions (<https://modugoodok.tistory.com/2>).

Consumer participation campaigns include the 2020 'Yummy Together Campaign' (donating one unit per unit sold to stray dog shelters with the Yami series launch) and the 2024 'RichzBOX MINI 100 Days' campaign collaborating with the Instagram dog influencer 'Pungi.' Review-based promotions reward purchase reviews with points and feed customer feedback into new product development. However, the subscription service is currently suspended due to production capacity limitations—a key area for future improvement.

4.4 Comparative Strategic Analysis of Three Companies

In the premium pet food market, Harim Pet Food, WOORIWA, and RichzBOX each adopt distinct strategies to meet consumer demands, differing markedly in target market, differentiation focus, and resource utilization:

Harim Pet Food builds a premium brand image through human-grade standards and large-scale production, responding to wellness consumption trends via omni-channel strategy and Harim Group ingredient credibility.

WOORIWA proposes customized solutions for specific pet health problems (allergy prevention, digestive improvement, weight management), reinforcing trust through veterinary clinic partnerships while actively pursuing global market entry.

RichzBOX leverages startup flexibility and innovation to offer personalized subscription services, ensuring safety and trust through smart factory quality management, and building a socially responsible brand image through shelter donations. Production volume constraints and limited promotion remain key growth-stage challenges.

Table 6. Comprehensive Comparative Analysis of Three Companies (Health-Centered Marketing)

항목	하림펫푸드	우리와	리치즈박스
강조점	웰니스 중심 휴먼그레이드 제품, 기능성 성분 포함	기능성 제품(알레르기 예방, 체중 관리 등)	고급 원재료 사용, 동결건조 공법 활용 멸균
제조 및 품질관리	대규모 설비와 철저한 품질 관리	글로벌 기준 충족(AAFCO, HACCP, 유기농 인증)	스마트 공장 시스템 기반 품질 관리, HACCP-FDA 인증
시장 내 위치	국내 프리미엄 시장 선두, 대규모 유통망·브랜드 신뢰 확보	기능성 제품 전문성 및 수출로 판로 확장	프리미엄 간식시장에서 성장 중, 제한적 B2C 운영
글로벌 진출	베트남·일본 수출(2021~)	아시아 8개국 수출, 500만 달러 이상(2년 연속)	초기 단계: FDA 인증 기반 준비 중

Source: Compiled by authors based on corporate websites and industry reports.

5. Discussion: Strategic Recommendations

5.1 Environmental Factors

5.1.1 Opportunities

Startups face a favorable environment in the domestic pet food market. The pet humanization trend and increasing numbers of pet-owning households are strengthening wellness-oriented consumption, driving premium demand and specifically increasing interest in human-grade products. Government recognition of the industry's growth potential—through the Ministry of Agriculture's 'Policy for Fostering the Pet-Related Industry'—and planned regulatory reforms are

expected to positively impact consumer trust and market positioning.

The global Asia-Pacific pet-related industry accounted for 29.6% of the global market in 2022—second only to North America and significantly ahead of Europe (13.1%) and South America (7.9%).²³ China's pet food market alone is projected to reach approximately CNY 114 billion by 2026, with compound annual growth rates of 17%, 15%, and 25% for staple food, nutrition products, and snacks respectively.²⁴ These figures represent substantial growth opportunities for Korean startups.

Table 7. Key Policy Initiatives for Pet Food (Ministry of Agriculture, Food and Rural Affairs, 2023)

주요 방안	기존	개정 방향
분류체계 마련	가축용 사료 법체계(사료관리법)로 대응	글로벌 기준에 부합하는 펫 푸드 분류체계(주식·간식·특수목적식), 영양기준·표시광고 기준 개편
표시기준 개선	소비자가 이해하기 어려운 원재료 용어 표시	소비자의 알 권리 강화, 정보 혼선 방지 등을 위한 표시기준 개선

Source: Ministry of Agriculture, Food and Rural Affairs (2023). Pet Industry Development Policy Measures.

5.1.2 Challenges

Startups face structural constraints, primarily limited capital and infrastructure, leading to disadvantages in production scale and efficiency relative to large corporations—negatively impacting supply stability and price competitiveness. Technical and financial burdens of achieving international certifications (HACCP, FDA, AAFCO) necessitate continuous investment. Competition with large corporations in digital marketing with limited budgets remains significant.

5.2 Marketing Strategies for Building Consumer Trust

5.2.1 Transparency and Credibility-Based Storytelling

RichzBOX's transparent communication of smart factory production processes, antibiotic-free and organic certifications, and ingredient traceability represents an effective model for consumer trust building. Proactively disclosing production processes, quality management details, and ingredient sourcing through social media and websites—particularly through manufacturing process videos and ingredient tracking systems—enables consumers to directly verify product safety and quality.²⁵

Consumer experience-centered content (customer cases, product review sharing) can enhance trust formation and purchase conversion rates. Identifying priority consumer selection attributes based on brand recognition and implementing focused strategies to improve consumer satisfaction are essential for building long-term trust-based relationships.

5.2.2 Personalized Consumer Experience

RichzBOX's initial personalized subscription service—providing products tailored to each pet's health condition, age, and preferences—significantly enhanced consumer satisfaction and represents a successful case of building emotional bonds with consumers while securing brand loyalty. Startups can meet consumer expectations and build long-term relationships through personalized approaches, forming an important foundation for a competitive brand image.

5.3 Sustainable Growth Models

5.3.1 Social Value Realization

RichzBOX's model of donating a portion of revenues to stray dog shelters, conveying the 'purchase as donation' circular message, effectively builds consumer loyalty through social responsibility. Nielsen Retail Scanner data-based research indicates that a one standard deviation increase in a company's Environmental & Social (E&S) rating corresponds to an average 9.2% increase in product sales.²⁶ Strengthening ESG elements—sustainable ingredient use, eco-friendly

²³한국농수산식품유통공사(2024), [중국] 중국 펫푸드 시장현황, 농식품수출정보 해외시장동향.

²⁵김경환(2022), 펫푸드 브랜드 인지에 따른 펫푸드 선택속성의 IPA(중요도-성취도)분석, Journal of the Korea Academia-Industrial cooperation Society, Vol. 23, No. 12 pp. 287-295.

²⁶Knowledge at Wharton (2024), ESG Investments Lead to Higher Sales. <https://knowledge.wharton.upenn.edu/article/esg->

packaging, community collaboration—is particularly important for European and North American markets where eco-friendly product preferences continue to grow.²⁷

5.3.2 Technological Innovation

Smart factory system advancement is critical for domestic startups to overcome limited production scale and achieve mass production capacity for both domestic and export markets. Advanced automation and efficient process management can not only reduce production costs but also maintain product quality consistency and meet demanding global market requirements. RichzBOX's pioneering smart factory implementation demonstrates that technological investment early in development can create lasting competitive advantages.

5.3.3 New Product Development

The global retort packaging market is growing at approximately 8% annually and is projected to reach approximately \$48 billion by 2028.²⁸ Retort technology-based customized pet meals or premium snack products can effectively enhance human-grade product market competitiveness, offering convenience and quality for everyday feeding as well as travel and special occasions. Continuous R&D investment will serve as a long-term growth driver for market share expansion.

5.4 Strategies for Domestic and Global Market Expansion

5.4.1 Localization for Global Markets

Localization strategies reflecting regional consumer characteristics and cultures are essential. Marketing content in local languages, local influencer collaboration, and customized product recommendation systems based on regional consumer data can improve consumer satisfaction and purchase conversion rates. The Asian market—where demand for premium snacks and human-grade products is high—offers particular opportunities for products utilizing regional specialties such as Jeju Hallasan horse.

5.4.2 Digital Marketing Strengthening

Digital marketing enables startups to achieve maximum impact with limited budgets. Partnerships with influencers must align with brand philosophy and direction rather than relying on celebrity alone, creating emotionally resonant content that builds authentic bonds with consumers. RichzBOX's planned collaboration with the prominent dog influencer 'HwangLatte' in 2025 exemplifies this strategic direction.

5.4.3 Collaboration and Partnership Strengthening

Cross-startup collaboration is an important strategic tool. For example, partnerships with startups possessing pet wearable technology can enable development of personalized nutritional products utilizing existing customer data. The pet wearable market is expected to grow from approximately \$3.28 billion in 2023 to approximately \$10.43 billion by 2032.²⁹ Collaboration between pet food companies and healthcare data startups can create more comprehensive and innovative products and services, strengthening competitive positioning across the health-pet ecosystem.

6. Conclusions

6.1 Summary and Conclusions

This study explored effective marketing strategies for domestic pet food startups in the context of rapid industry growth and the pet humanization trend. The global pet food market is projected to reach approximately \$493 billion by 2030, and the domestic market is expected to grow to approximately \$15.2 billion by 2032. Human-grade products have emerged as a key purchase criterion centered on consumer trust and safety.

Comparative analysis of Harim Pet Food, WOORIWA, and RichzBOX reveals that no single strategy dominates—each firm's approach is tightly aligned to its resource base, organizational capabilities, and target consumer segment. Harim Pet Food executed a wellness-centered strategy using large-scale distribution and brand trust. WOORIWA provided personalized consumer experiences through functional product development and digital marketing. RichzBOX demonstrated that startups can achieve premium market success through innovation, quality certification, and social responsibility branding, even under resource constraints.

investments-lead-to-higher-sales/

²⁷박성훈, 임대웅, 이한경 외(2022), 지속가능경영을 위한 기업가이드 ESG A to Z, 대한상공회의소.

²⁸GII Korea(2024), Technavio(2024), 세계의 레토르트 포장 시장(2024-2028년). <https://www.giikorea.co.kr/report/infi1584042-global-retort-packaging-market.html>; Fortune Business Insights (2024), Retort packaging market size, share & industry analysis, 2023-2032.

²⁹Fortune Business Insights (2024), Pet wearable market size, share & industry analysis, 2023-2032. <https://www.fortunebusinessinsights.com/pet-wearable-market-109856>

Core success factors identified for domestic pet food startups include: (1) human-grade product-centered trust building and quality certification system establishment; (2) strengthening emotional consumer connections through digital marketing and social media; (3) advancing smart factory systems to simultaneously improve productivity and quality; and (4) strengthening pet food-specific classification systems and management standards to enhance consumer trust. Limitations of this study include its reliance on case-study analysis without quantitative validation of strategy effects.

6.2 Implications

Establishing clear criteria and certification systems for human-grade products is essential for the reliability and competitiveness of the domestic pet food industry. This requires revision of the existing Feed Management Act to prevent false advertising and ensure product safety and quality. In particular, introducing domestic standards based on AAFCO guidelines would provide consumer trust and create an environment for producing internationally competitive products.

The government should support smart factory system advancement to help startups maintain quality consistency and global market competitiveness—through financial support and technical consulting. Digital marketing strategy support is also needed, particularly helping startups implement certification campaigns aligned with brand philosophy and effectively utilize online marketing tools for emotional consumer connection.

Policy measures to promote overseas market entry are equally essential: simplifying certification procedures to comply with global standards, supporting localized marketing strategies suitable for each country's market characteristics, and providing export-related tax benefits and international exhibition participation support. Government-industry collaboration will enable domestic pet food startups to consolidate domestic presence while achieving sustainable global market growth.

Future research should quantitatively evaluate specific outcomes such as revenue growth, consumer satisfaction, and brand loyalty; conduct segmented consumer behavior analysis by region, generation, and lifestyle; and perform in-depth analysis of specific global market entry cases and strategies for more comprehensive strategic guidance.

Appendix A

Table A1. RichzBOX CEO Interview Questions (Semi-Structured Format)

- Q1. What was the founding background and philosophy of RichzBOX? How did the concept of human-grade pet food emerge as a core business focus?
- Q2. How was the human-grade product development process conducted? What were the primary challenges in securing ingredient quality and manufacturing standards?
- Q3. What consumer targeting strategy has RichzBOX adopted, and how were initial target consumer segments identified?
- Q4. How does RichzBOX differentiate from competitors such as Harim Pet Food and WOORIWA? What do you consider to be your sustainable competitive advantages?
- Q5. How did the smart factory system and HACCP/FDA certifications contribute to product quality and consumer trust building?
- Q6. What were the key learnings from the initial personalized subscription service? What plans exist for its restoration or evolution?
- Q7. How does the social responsibility initiative (shelter donations, 'purchase as donation' model) contribute to brand value and consumer loyalty?
- Q8. What are your plans for domestic and global market expansion, and what regulatory or resource challenges must be overcome?
- Q9. What government policy support or industry ecosystem changes would most benefit pet food startups at your stage of development?

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