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US Collection

Pet Cleanup & Odor-Control Products: United States

February 2022



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About This Report

Scope

This report forecasts to 2022 and 2026 US retail sales of pet cleanup and odor-control products in nominal US dollars. Total retail sales are segmented by category in terms of:

- cat litter and non-durable accessories
- puppy/training pads and accessories
- cleanup and odor-control preparations
- dog waste bags

To illustrate historical trends, total retail sales and the various segments are reported at five-year intervals for 2016 and 2021.

This report analyzes the US market for pet cleanup and odor-control products sold at retail, including mass-market outlets (supercenters, mass merchandisers, supermarkets, warehouse clubs, drugstores, dollar stores), pet specialty stores (chains and independents), and the internet. The report focuses on products for dogs and cats.

General-market cleanup and odor-control products not marketed as pet-specific are considered only as a point of comparison.

This report does not cover durable cleanup products such as litter boxes, scoops, and durable dog waste product accessories, all of which are covered in Packaged Facts' October 2020 report *Durable Dog and Cat Petcare Products*. This report also excludes small animal litter used for bedding and/or grazing, which is covered in Packaged Facts' August 2021 *Fish, Small Mammal, Herptile, & Bird Products: U.S. Pet Market Trends and Opportunities*; and pet grooming products such as shampoos and coat fresheners, which are covered in Packaged Facts' *Pet Grooming, Skin & Coat, and Spa Products and Services in the U.S.*

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or r^2 . The most stable data series relative to the trend carries an r^2 value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

A full outline of report items by page is available in the Table of Contents.

Sources

Pet Cleanup & Odor-Control Products: United States (FF90044) is based on *Pet Litter, Cleanup, and Odor-Control Products: U.S. Market Trends*, a comprehensive industry study published by Packaged Facts. The information contained in that report was obtained from primary and secondary research. Primary research entailed informal interviews with pet industry experts; attendance at Global Pet Expo, Petfood Forum, and other trade events; consultations with pet product manufacturers and members of the trade; and an on-site examination of retail venues. Secondary research included extensive research and data-gathering from relevant consumer business and trade publications; company reports (including annual reports, press releases, and investor conference calls); company profiles in trade and consumer publications; government reports; and other pet market reports by Packaged Facts.

Sales estimates were based on published and inferred sales of major market participants; market size estimates from other sources that appeared in the trade press; figures obtained through consultation with pet market participants; the performance of relevant retail venues; consumer usage rates for relevant products; market entry rates of companies and products; and sales data from syndicated resources.

Consumer analysis drew mainly on two sources:

- Packaged Facts' Surveys of Pet Owners, primarily the one conducted in November/December 2021. These surveys have a sample of 2,000 US respondents aged 18 or over that, in aggregate, are representative of the primary demographic measures of the US Census Bureau, including gender, age bracket, race/ethnicity, geographic region, household income bracket, and presence of children in the household. The survey sample included 986 dog owners and 704 cat owners.
- MRI-Simmons Fall 2021 booklet-based consumer survey of a large and random sample of approximately 25,000 consumers that, in aggregate, represent a statistically accurate cross-section of the US population. Note that MRI-Simmons releases approximately correspond to a 12-month roll-up of survey fielding ending in the quarter indicated; the respondents and results for adjacent surveys are, therefore, partially overlapping rather than mutually exclusive.

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

Industry Codes

Table 3 | NAICS & SIC Codes Related to Pet Cleanup & Odor-Control Products

NAICS/SCIAN 2017 North American Industry Classification System		SIC Standard Industrial Classification	
325998	All Other Miscellaneous Chemical Product and Preparation Mfg	0752	Animal Specialty Services, Except Veterinary
424990	Other Miscellaneous Nondurable Goods Merchant Wholesalers	2899	Chemicals and Chemical Preparations, NEC
453910	Pet and Pet Supplies Stores	5149	Groceries and Related Products, NEC
812910	Pet Care (except Veterinary) Services	5199	Nondurable Goods, NEC
		5999	Miscellaneous Retail Stores, NEC

Source: US Census Bureau

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Resources

Packaged Facts

Durable Dog and Cat Petcare Products

Pet Food in the U.S.

Pet Litter, Cleanup, and Odor-Control Products: U.S. Market Trends

Pet Medications in the U.S.

Pet Population and Ownership Trends in the U.S.: Dogs, Cats, and Other Pets

Pet Supplements in the U.S.

Pet Treats and Chews in the US

U.S. Pet Market Outlook, 2021-2022

Veterinary Services in the U.S.: Competing for the Pet Care Customer

The Freedonia Group

Freedonia Industry Studies

Cannabis Growing Market

Global E-Commerce

Global E-Commerce Packaging

Nonwovens

Retail Bags

Freedonia Focus Reports

Cannabis Production: United States

COVID-19 Market Impact Analysis

Demographics: United States

E-Commerce: United States

Pet Food: United States

Pet Medications: United States

Pet Products & Services: United States

Pet Supplements: United States

Pet Treats & Chews: United States

Freedonia Custom Research

Trade Publications

Pet Age

Pet Business

Petfood Industry

Pet Product News International

Veterinary Practice News

Agencies & Associations

American Kennel Club

American Pet Products Association

American Veterinary Medical Association

American Society for the Prevention of Cruelty to Animals

Independent Pet Retailer Association

United States Census Bureau

United States Environmental Protection Agency

United States Food and Drug Administration

United States International Trade Commission

World Pet Association