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US Collection

Pet Clean-Up & Odor-Control Products: United States

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Table of Contents

1. Highlights	4
2. Market Overview	5
Market Size	5
Slow But Steady Gains in Retail Sales	5
Cat Litter Is Top Category	6
Market Share by Retail Channel	7
Market Drivers	8
Clean-Up Innovations Make Pet Ownership Easier	8
Pets as Family	8
Health & Wellness	8
Pet Ownership Trends	8
Millennials & Housing Issues	9
Natural & Eco-Friendly	10
Legislating Pet Waste	10
Cat Elimination Habits	10
Opportunities in the Pet Clean-Up & Odor-Control Market	11
Omnichannel Approach	11
Time-Saving Solutions	11
Affordable Natural/Eco-Friendly Products	12
Accessible Natural/Eco-Friendly Products	12
Product Safety	13
Smaller Pets, Smaller Spaces	13
Cat Litter & Accessories	14
Competitive Overview	14
Cat Litter Marketing & New Product Trends	16
Retail Trends	18
Consumer Trends	19
Dog Waste Management Products	20
Competitive Overview	20
Training Pads Marketing & New Product Trends	21
Waste Bags/Accessories Marketing & New Product Trends	22
Retail Trends	22
Consumer Trends	23
Clean-Up & Odor-Control Preparations	24
Competitive Overview	24
Clean-Up & Odor-Control Marketing & New Product Trends	25

Retail Trends	25
Consumer Trends	26
3. About This Report	27
Scope	27
Sources	28
Industry Codes	29
Resources	30

List of Tables & Figures

Figure 1 Key Trends in the US Pet Clean-Up & Odor-Control Product Market, 2019 – 2024	4
Figure 2 US Pet Clean-Up & Odor-Control Product Retail Sales by Category, 2014 – 2024 (US\$ bil)	5
Table 1 US Pet Clean-Up & Odor-Control Product Retail Sales by Category, 2014 – 2024 (US\$ mil)	5
Figure 3 US Pet Clean-Up & Odor-Control Product Retail Sales by Category, 2014 – 2024 (%)	6
Figure 4 US Pet Clean-Up & Odor-Control Product Retail Sales by Channel, 2019 (%)	7
Table 2 US Penetration Rates for Dogs & Cats, 2009 – 2019 (% of US hshlds)	9
Table 3 US Household Base for Dog & Cat Ownership, 2009 – 2019 (mil US hshlds)	9
Table 4 NAICS & SIC Codes Related to Pet Clean-Up & Odor-Control Products	29

About This Report

Scope

This report forecasts to 2024 US retail sales of pet clean-up 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
- clean-up 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 2014 and 2019.

This report analyzes the US market for pet clean-up and odor-control products sold across the full retail spectrum, including mass-market outlets (supercenters, mass merchandisers, supermarkets, warehouse clubs, drugstores, dollar stores), pet specialty stores (independents and chains), and the internet. The report focuses on products for dogs and cats. General-market clean-up and odor-control products not specifically marketed as pet-specific are considered only as a point of comparison.

This report does not cover durable clean-up products such as litter boxes and scoops and durable dog waste product accessories, which are covered in Packaged Facts' *Durable Dog and Cat Petcare Products*. The report also excludes small animal litter used for bedding and/or grazing, which is covered in Packaged Facts' *Fish, Small Animal, Reptile, & 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 Clean-Up & Odor-Control Products: United States (FF90044) is based on *Pet Litter, Clean-Up, and Odor Control: U.S. Market Trends and Opportunities*, 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 of the Global Pet Expo and Petfood Forum trade events from 2005 through 2019, consultations with pet product manufacturers and members of the trade, and an on-site examination of retail venues. Secondary research included extensive internet canvassing and 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 are based on published and estimated sales of major market participants, market size estimates from other sources appearing in the trade press, figures obtained through consultation with pet market participants, the performance of relevant retail venues, consumer usage rates for relevant products, rates of company and product entries into the market, and sales data from syndicated resources.

Our consumer analysis draws mainly on two sources:

- Packaged Facts Surveys of Pet Owners, primarily the one conducted in July/August 2019. These surveys have a sample of 2,000 US respondents age 18 or over who in aggregate are representative of the primary demographic measures of gender, age bracket, race/ethnicity, geographic region, household income bracket, and presence of children in the household of the US Census Bureau. The survey sample included 1,007 dog owners and 737 cat owners.
- MRI-Simmons Spring 2019 booklet-based consumer survey of a large and random sample of approximately 25,000 consumers, who in aggregate represent a statistically accurate cross-section of the US population.

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

Industry Codes

Table 4 | NAICS & SIC Codes Related to Pet Clean-Up & Odor-Control Products

NAICS/SCIAN 2017		SIC	
North American Industry Classification System		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

Pet Industry Outlook: Veterinary Services and Pet Product Retailing
Pet Litter, Clean-Up, and Odor Control: U.S. Market Trends and Opportunities
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.
U.S. Pet Market Outlook, 2019-2020
Veterinary Services in the U.S.: Competing for the Pet Care Customer

The Freedonia Group

Freedonia Industry Studies

Cannabis Growing Market
Converted Flexible Packaging
Global E-Commerce
Global E-Commerce Packaging
Global Housing
Retail-Ready Packaging

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Cannabis Production: United States
Demographics: United States
E-Commerce: United States
Pet Food: United States
Pet Insurance: United States
Pet Medications: United States
Pet Oral Care: United States
Pet Products & Services: United States
Pet Supplements: United States
Pet Treats & Chews: United States

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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

National Animal Supplement Council

Pet Leadership Council

United States Census Bureau

United States Environmental Protection Agency

United States Food and Drug Administration

United States International Trade Commission

World Pet Association