

A collage of various pet supplies is arranged around a central text area. On the left, a circular inset shows a collection of items on a light orange background: several small white and yellow bone-shaped treats, a long colorful braided rope, a blue bowl filled with white and brown treats, a blue ball with a paw print, and a yellow bone-shaped toy. On the right, a light blue background features a white bowl filled with brown kibble, a red-handled grooming brush, a metal comb, a large bone, a red heart-shaped treat, a green mesh ball with a pink feather, a yellow and red braided rope, and several other bone-shaped treats and kibble pieces.

CommercelQ

INDUSTRY REPORT

CategoryIQ Pet Supplies

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Executive summary

Our CategoryIQ reports unpack the latest market trends from US Amazon data at the category level. These exclusive insights help our customers understand the category and competitive dynamics influencing market growth, and how they can apply winning strategies to grow their brands across retailers, too.

Here's what we found is trending in Pet Supplies:

The Pet Supplies market grew by an average of 3.8% in Q3 2024, with the Cat Litter and Housebreaking segment leading the charge.

Brands like Fresh Step and Petsafe faced declines in market share despite promotional efforts, signaling inefficiencies in advertising spend and competitive strategies. Meanwhile, Petlibro gained market share in Feeding and Watering Supplies, rising from 12.5% to 15.3% —supported by its strong presence in high-demand themes like stainless steel containers.

3 Key insights

Competitive shifts

Brands that successfully aligned with evolving consumer preferences underscored the importance of targeted strategies in pricing, innovative product development and effective advertising

Mid-range prices are performing

Price bands heavily influenced unit sales, with the \$13-17 range dominating for Pooper Scoopers and Bags (39% units & revenue)

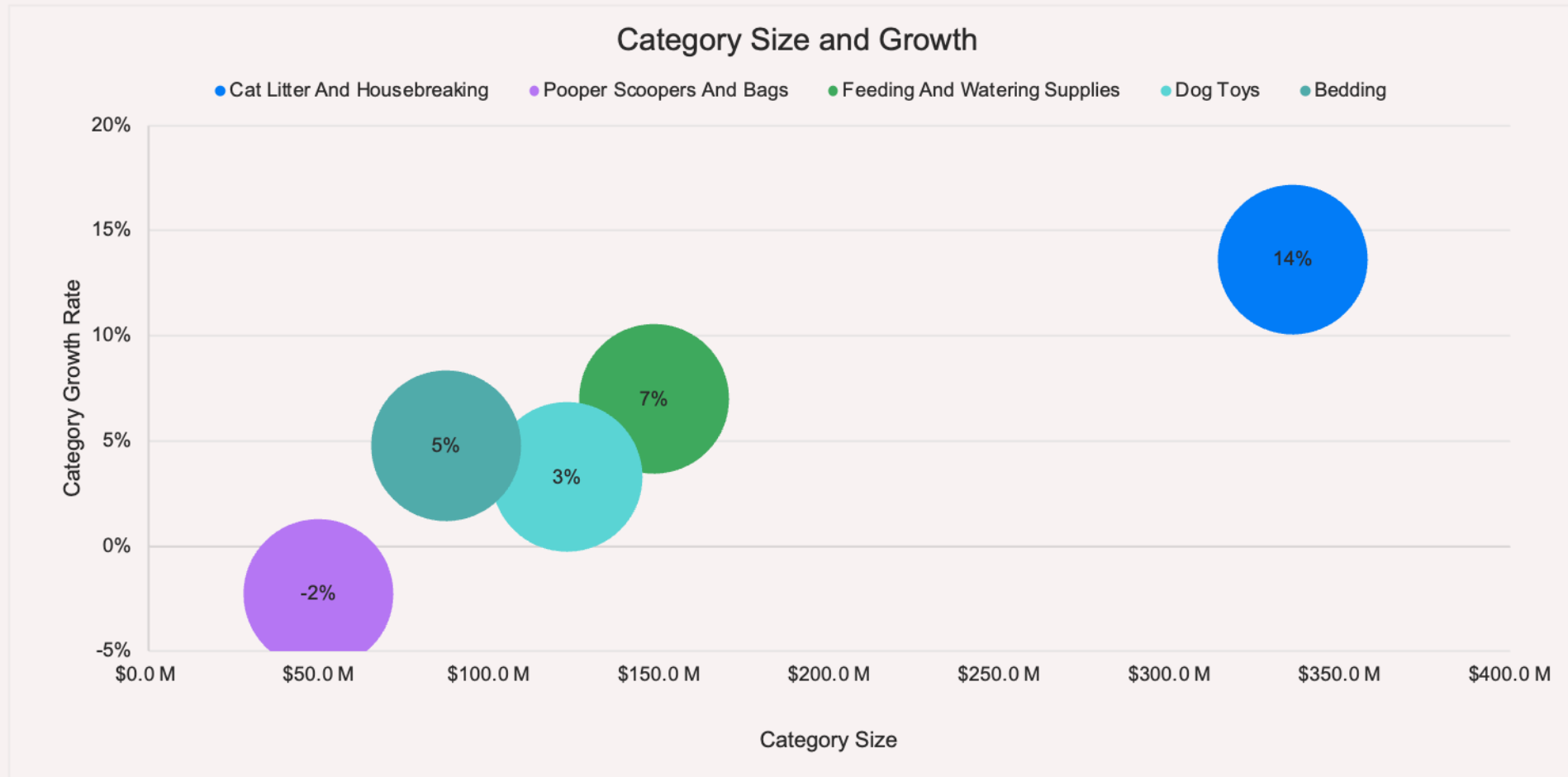
Shoppers are embracing innovative products

Emerging product themes such as Automatic Self-Cleaning Litter Boxes (16.9% share) and App-Controlled Feeders. (23.5% share in their theme) highlighted a growing preference for innovative, technology-driven pet care solutions

On average, categories have grown by 3.8%, indicating a positive market trend

Takeaway

- The category size for Cat Litter And Housebreaking grew 13.6% from \$296M to \$336.3M
- Pooper Scoopers and Bags saw a 2% decline in the category size to \$49.9M



Competitor Watch: Top Gainers and Losers

Top Gainers			Top Losers	
Category				
Bedding	Bedsure 7.1% (1.7%)	Ohgeni 4.7% (1.2%)	Coolaroo 1.4% (-1.3%)	Furhaven 5.0% (-0.7%)
Cat Litter And Housebreaking	Zeacotio 2.4% (2.1%)	Neakasa 2.1% (1.1%)	Fresh Step 7.7% (-1.6%)	Petsafe 9.3% (-1.5%)
Dog Toys	Best Pet Supplies 2.0% (0.4%)	Benebone 5.8% (0.4%)	Multipet 1.6% (-0.9%)	Chuckit 5.8% (-0.5%)
Feeding And Watering Supplies	Petlibro 12.5% (2.8%)	Neareal 1.2% (0.5%)	Petsafe 1.3% (-0.4%)	Giotohun 0.7% (-0.3%)
Food Storage	Gamma2 27.1% (1.1%)	Ddmommy 3.2% (0.7%)	Iris 34.3% (-3.1%)	Simplehuman 11.3% (-0.4%)
Kennels And Crates	Bestpet 4.2% (2.0%)	Homey Pet 1.4% (1.1%)	Midwest Homes For Pets 40.9% (-2.9%)	Petmate 9.5% (-1.1%)
Pooper Scoopers And Bags	Amazon Basics 14.7% (1.2%)	Greener Walker 4.5% (0.8%)	Arm & Hammer 2.6% (-1.3%)	Earth Rated 20.7% (-0.7%)



Category Deep Dive

Pooper Scoopers And
Bags



The Commerce Playbook hasn't changed

But the key factors are more interconnected and dynamic





Takeaway

Competitive Benchmarking – Top Brands

The Feeding and Watering Supplies category stays competitive as the market leader gains share and top brands adjust ASPs

			Traffic			Pricing	
Brand	Market share	Sales	Brand Strength	Organic SoV	Sponsored SoV*	ASP	Promo Rate
Petlibro	12.5% (2.8%)	18.5M (38.3%)	1.2%	2.9% (0.1%)	7.7% (-1.3%)	63.8 (-0.9%)	46.7% (6.0%)
Hoki Found	1.9% (-0.2%)	2.8M (-3.1%)		0.2% (0.0%)	0.6% (0.0%)	24.4 (-24.4%)	
Gorilla Grip	1.8% (-0.2%)	2.6M (-2.9%)		1.8% (0.3%)	0.8% (-0.2%)	18.5 (0.2%)	
Oneisall	1.6% (0.4%)	2.4M (36.3%)		0.7% (0.1%)	0.4% (0.2%)	53.7 (-5.5%)	16.3% (8.7%)
Petsafe	1.3% (-0.4%)	2.0M (-18.2%)	0.1%	1.5% (-0.3%)	0.2% (-1.0%)	39.9 (-6.4%)	6.7% (6.3%)
Neater Pet	1.3% (0.0%)	1.9M (3.8%)				29.8 (-2.2%)	0.1%
Petkit	1.3% (0.0%)	2.0M (9.5%)	1.7%	0.6% (0.0%)	1.3% (-0.4%)	43.9 (-5.6%)	4.3% (3.6%)

- Petlibro gained market share (from 12.5% to 15.3%) in category Feeding And Watering Supplies
- Oneisall saw the biggest promotion rate change (from 16.3% to 24.1%), gaining market share compared to other brands



Takeaway

Competitive Benchmarking – Top Brands

The Pooper Scoopers And Bag category stays competitive as the market leader loses share and top brands adjust ASPs

			Traffic			Pricing
Brand	Market share	Sales	Brand Strength	Organic SoV	Sponsored SoV*	ASP
Earth Rated	20.7% (-0.7%)	20.7M (-5.5%)	0.8%	5.8% (0.6%)	7.2% (0.8%)	14.0 (2.3%)
Amazon Basics	14.7% (1.2%)	14.7M (6.3%)	5.2%	-	-	11.8 (-0.5%)
Greener Walker	4.5% (0.8%)	4.5M (18.3%)	-	1.1% (-0.1%)	1.3% (0.4%)	17.1 (-1.0%)
Pet N Pet	2.9% (-0.4%)	2.9M (-12.8%)	-	2.2% (0.6%)	4.9% (0.1%)	19.8 (3.6%)

- Amazon Basics gained market share (from 13.5% to 14.7% - grew by 1.2%) in category Pooper Scoopers And Bags
- Pet N Pet saw a promotion rate change, losing market share (from 3.3% to 2.9% - declined by 0.4%)



Takeaway

Competitive Benchmarking – Top Brands

As Cat Litter And Housebreaking category grew overall, stays competitive as the market leaders loses share and brands scale down advertising

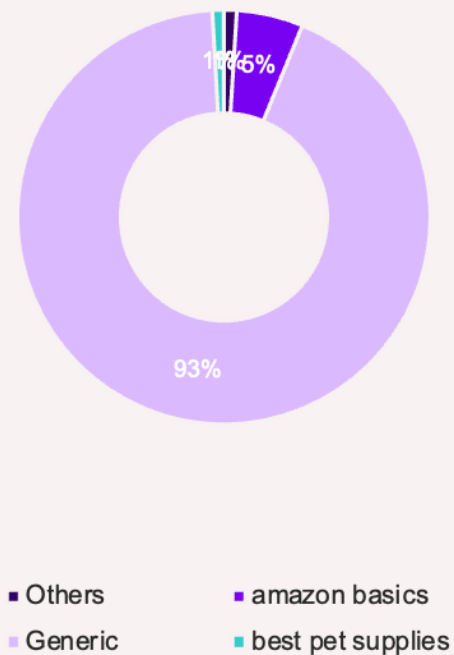
			Traffic			Pricing	
Brand	Market share	Sales	Brand Strength	Organic SoV	Sponsored SoV*	ASP	Promo Rate
Petsafe	9.3% (-1.5%)	62.3M (-2.6%)	2.5%	2.5% (-0.2%)	1.2% (-1.2%)	59.6 (-2.3%)	7.4% (7.4%)
Fresh Step	7.7% (-1.6%)	52.0M (-5.3%)	0.4%	4.8% (-1.3%)	4.1% (-4.9%)	19.6 (-10.2%)	0.3%
Purina	6.3% (-0.6%)	42.6M (3.5%)	0.2%	2.7% (-0.9%)	4.1% (-4.6%)	27.4 (0.0%)	1.6% (1.0%)
Dr. Elsey's	4.4% (-0.4%)	29.3M (4.3%)		1.2% (-1.1%)	0.0% (0.0%)	18.3 (-0.3%)	3.1%

- Fresh Step lost market share (from 9.3% to 7.7%) in category Cat Litter And Housebreaking
- Petsafe's promotion rate increased significantly, yet it lost market share, indicating promotions did not drive growth

Traffic Drivers – Search Behavior For Pooper Scoopers & Bags

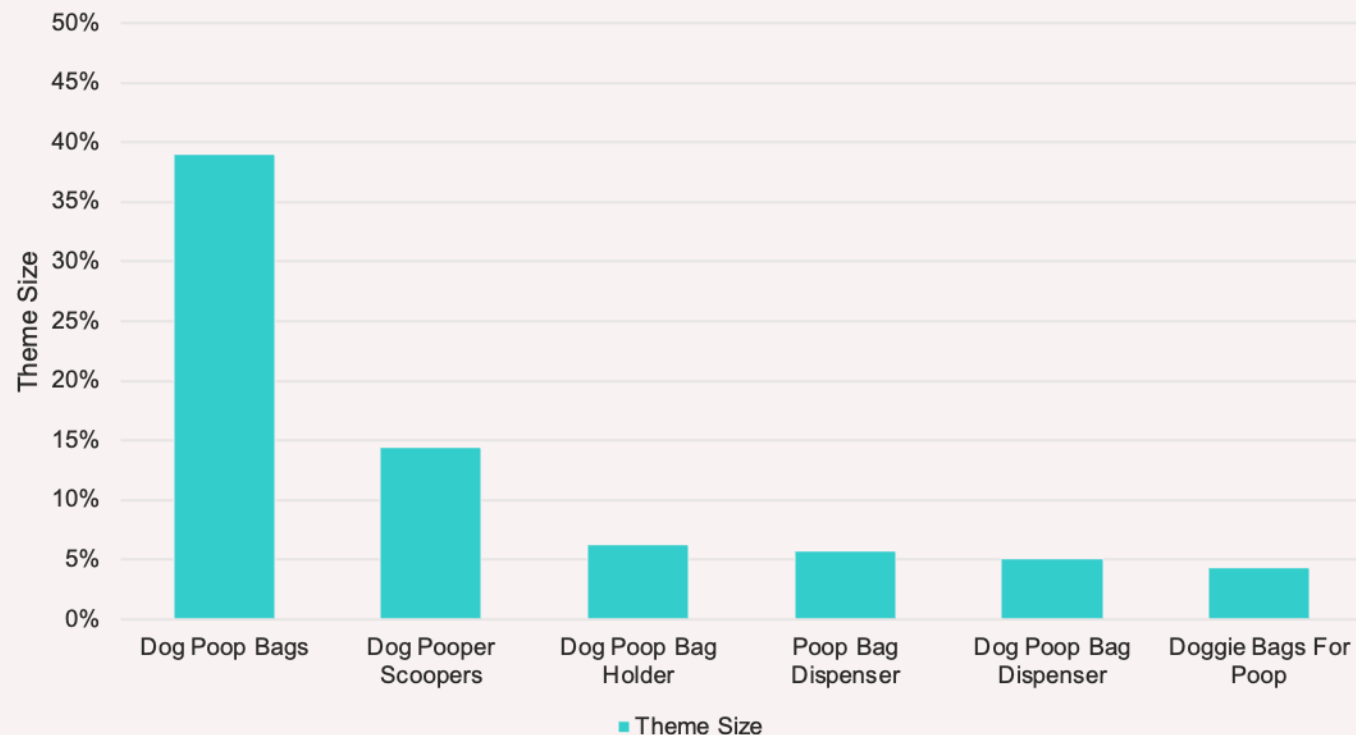
Takeaway

Amazon: Search Traffic Behavior



5 % of category search is directly for **Amazon Basics** products

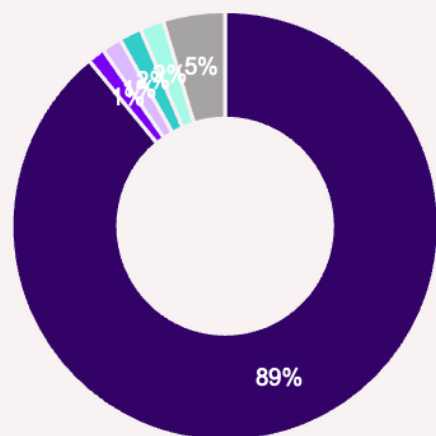
Shopper Search Themes



- Dog Poop Bags has a 39% share of voice in all search themes, Earth Rated has highest share of 16.5%
- In Dog Pooper Scoopers and Dog Poop Bag Holder are other themes with 15% and 5% share of voice, Mxf has highest share of 8.5% in Dog Pooper Scoopers

Traffic Drivers – Search Behavior For Feeding And Watering Supplies

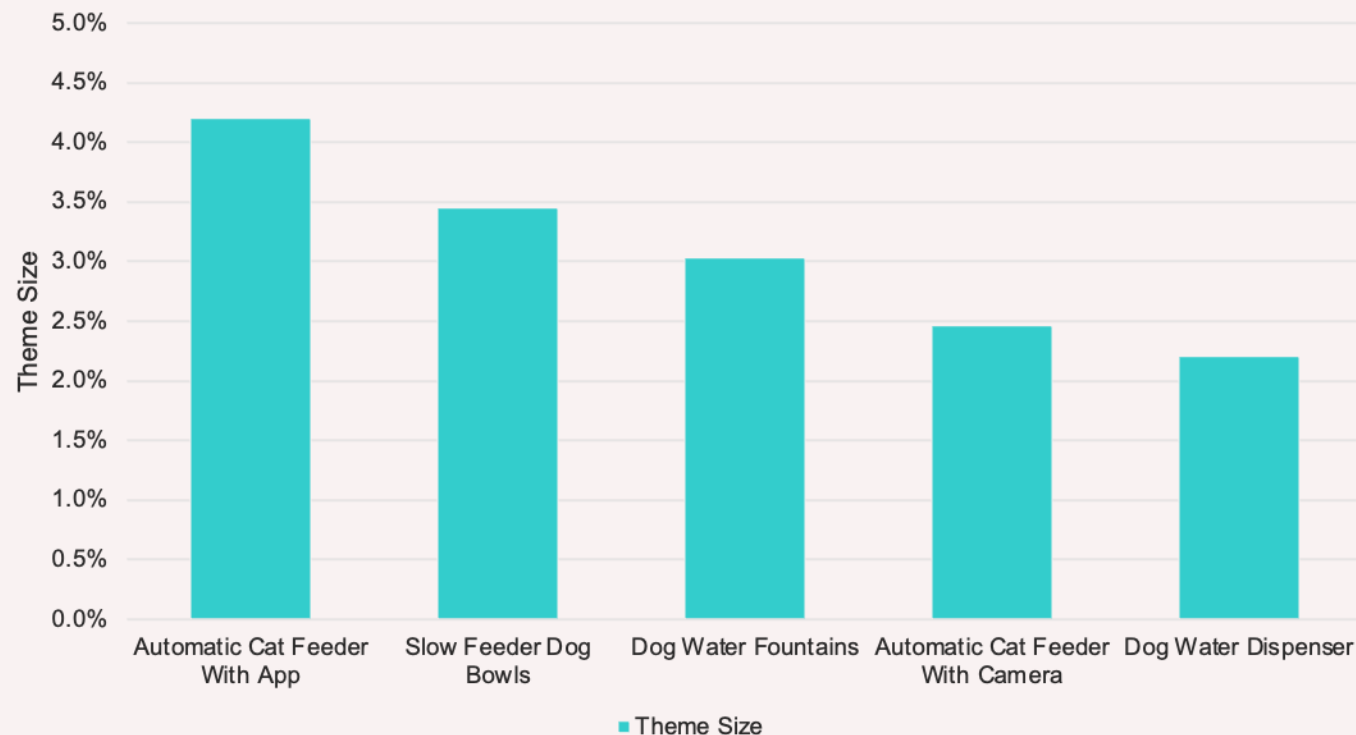
Amazon: Search Traffic Behavior



■ Generic ■ van ness ■ petmate
 ■ petkit ■ lickimat ■ Others

2 % of category search is directly for **lickimat** products

Shopper Search Themes



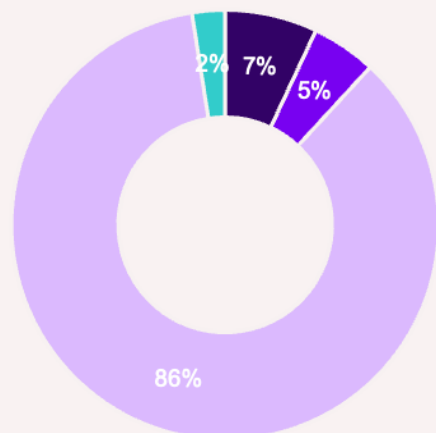
Takeaway

- Automatic Cat Feeder With App is the largest search theme with 4.2% share of voice, Petilbro is a prominent brand with 25.5% share
- Dog Supplies themes like Slow Feeder Dog Bowls and Dog Fountains follow closely with 3.5% and 3% share respectively
- Outward Hound has 9% share in Slow Feeder Dog Bowls, making it the top brand in the segment

Traffic Drivers – Search Behavior For Cat Litter & Housebreaking

Takeaway

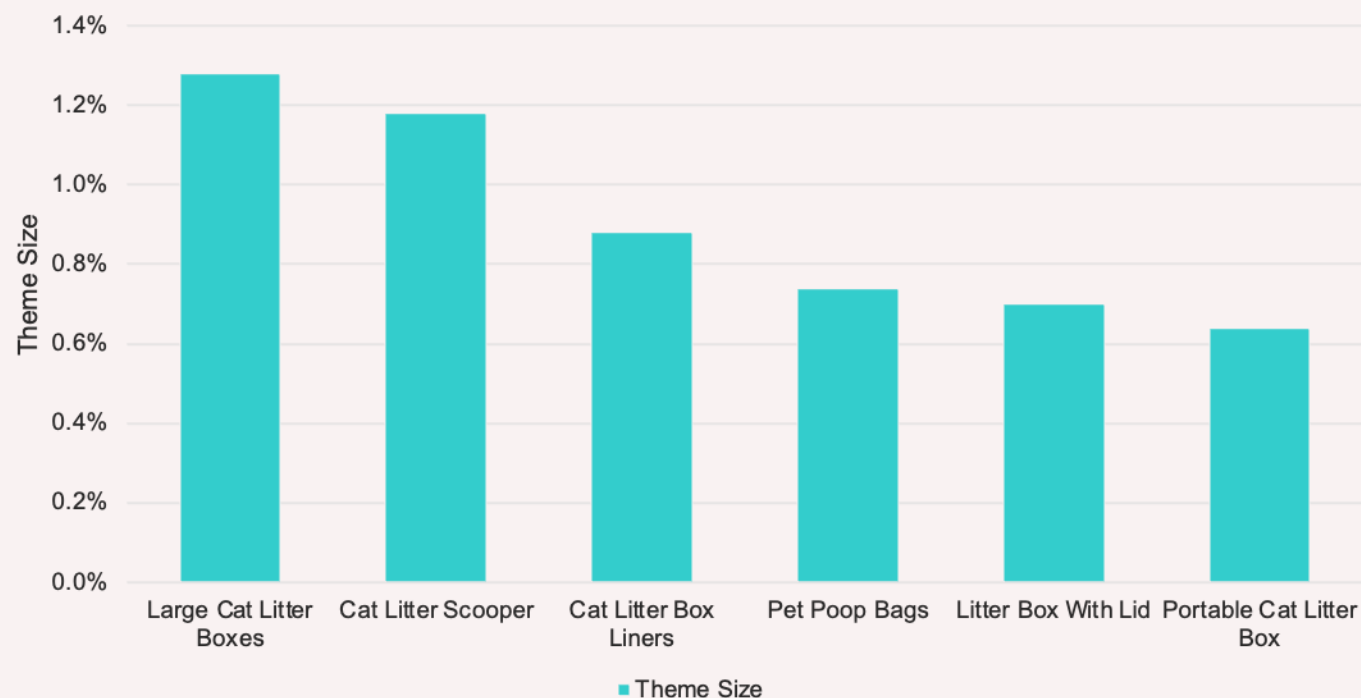
Amazon: Search Traffic Behavior



■ Others ■ wowflash ■ Generic ■ petsafe

4 % of category search is directly for **wowflash** products

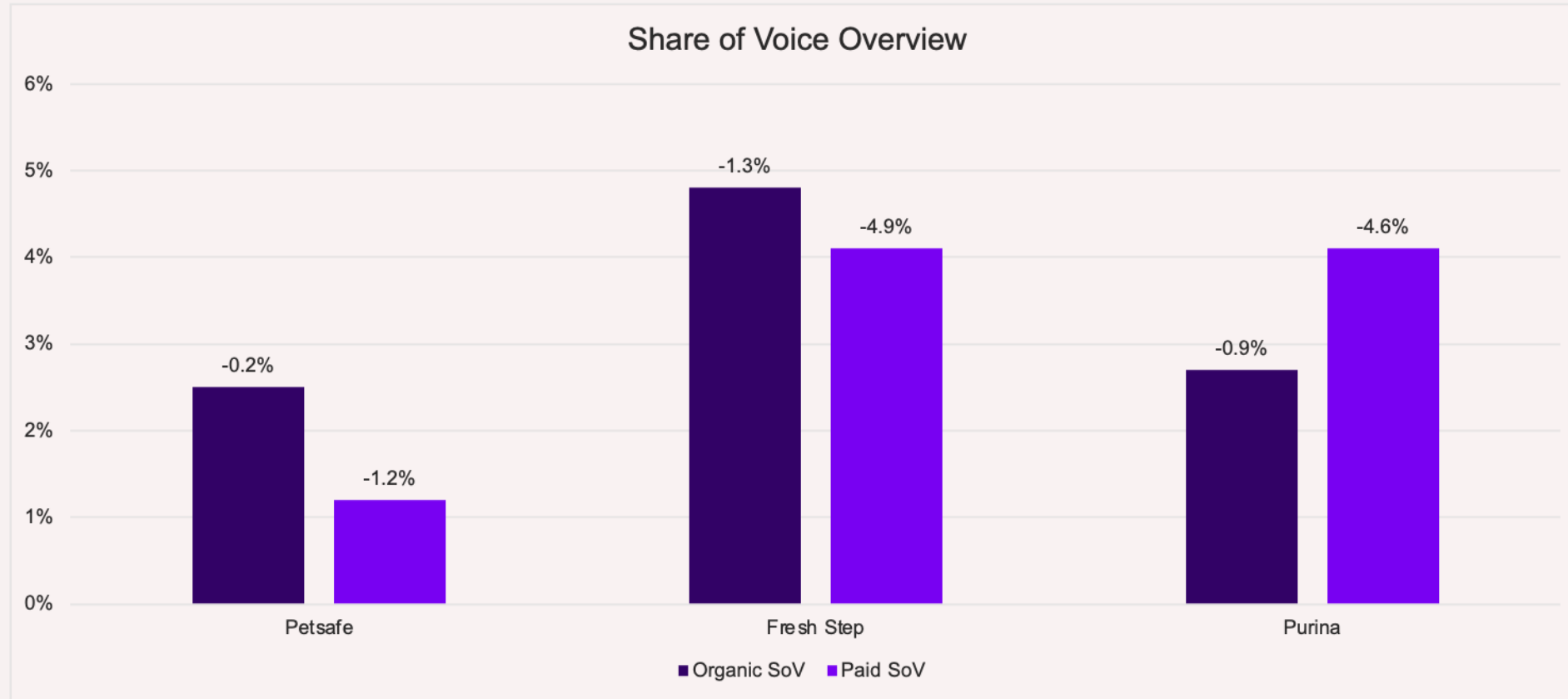
Shopper Search Themes



- Large Cat Litter Boxes and Cat Litter Scoopers are the top generic themes users are searching for, with a share of 1.3% and 1.2% respectively, Iris is the top brand with 11% share and Wepet 13%
- Users looked up other generic search terms like Box Liners, Poop Bags and Portable Litter Boxes that have relatively significant share

Traffic Drivers – Share of Voice

Brands are scaling down advertising, with Fresh Step experiencing the highest decline of 5%

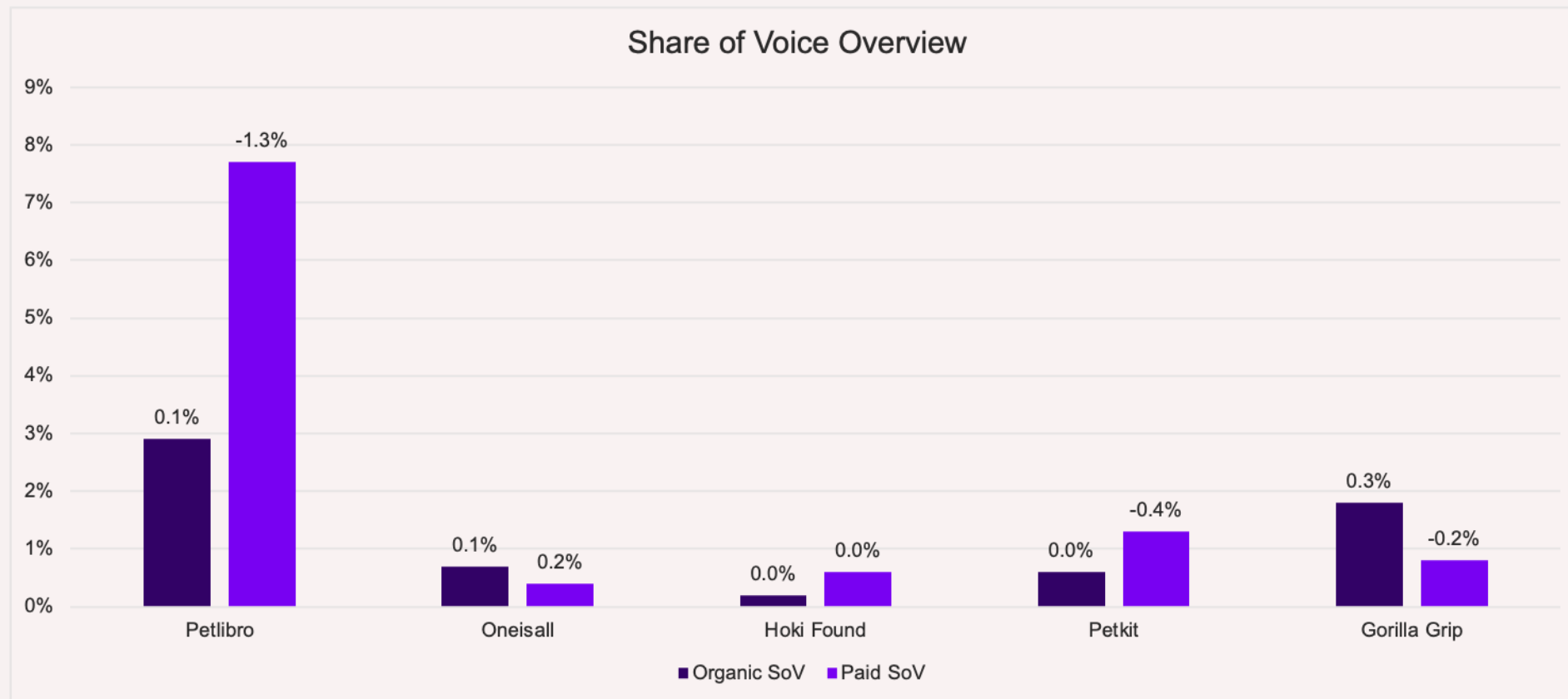


Takeaway

- Fresh Step experienced the highest decline in presence, with organic presence dropping by 1.3% and market share at 7.73%
- Purina's organic presence declined slightly by 0.9%, but Purina share of voice decreased by 4.6%

Traffic Drivers – Share of Voice

Market Leader, Petlibro experiences highest decline in paid presence

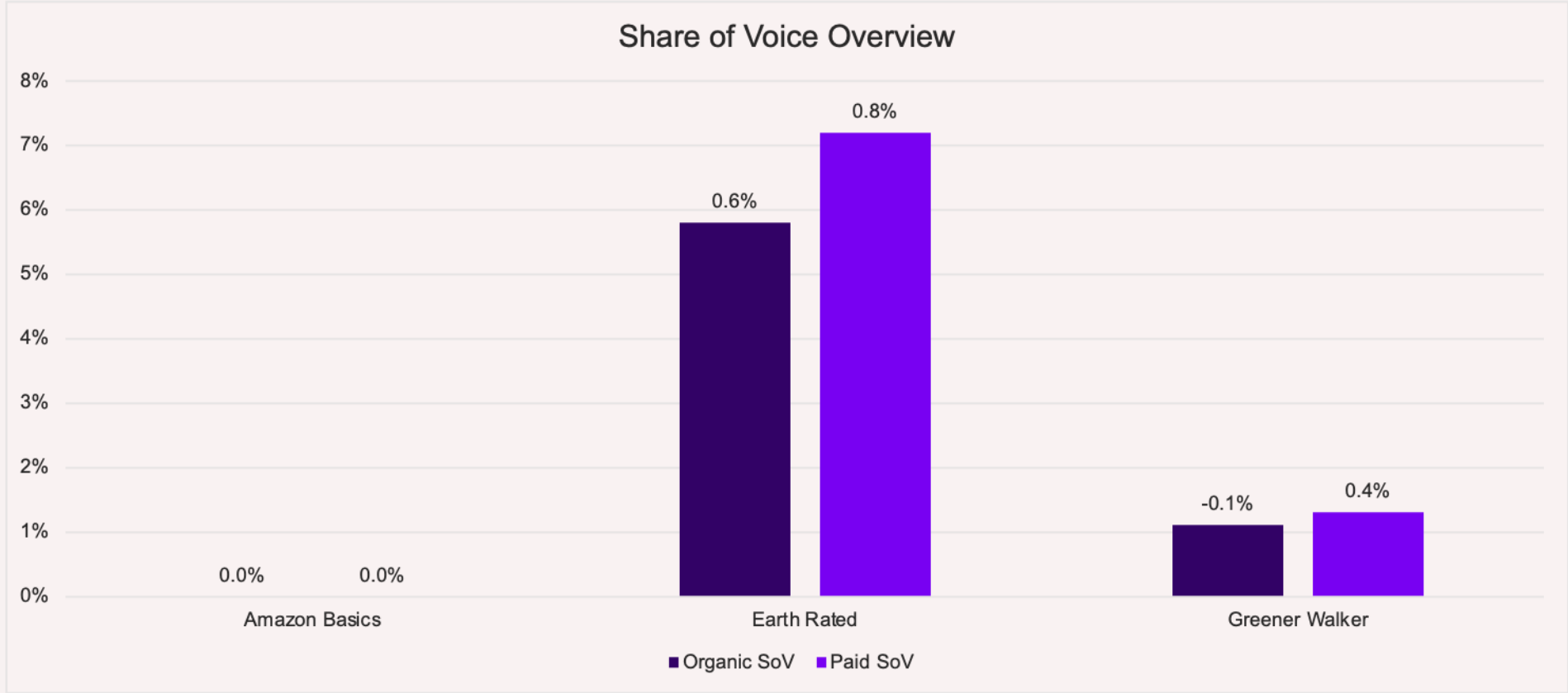


Takeaway

- Petlibro experienced the highest decline in paid presence, reducing from 7.7% to 6.4% - declined by 1.3%
- Gorilla Grip saw the highest increase in organic presence by 0.3% and a decline of 0.2% in paid presence

Traffic Drivers – Share of Voice

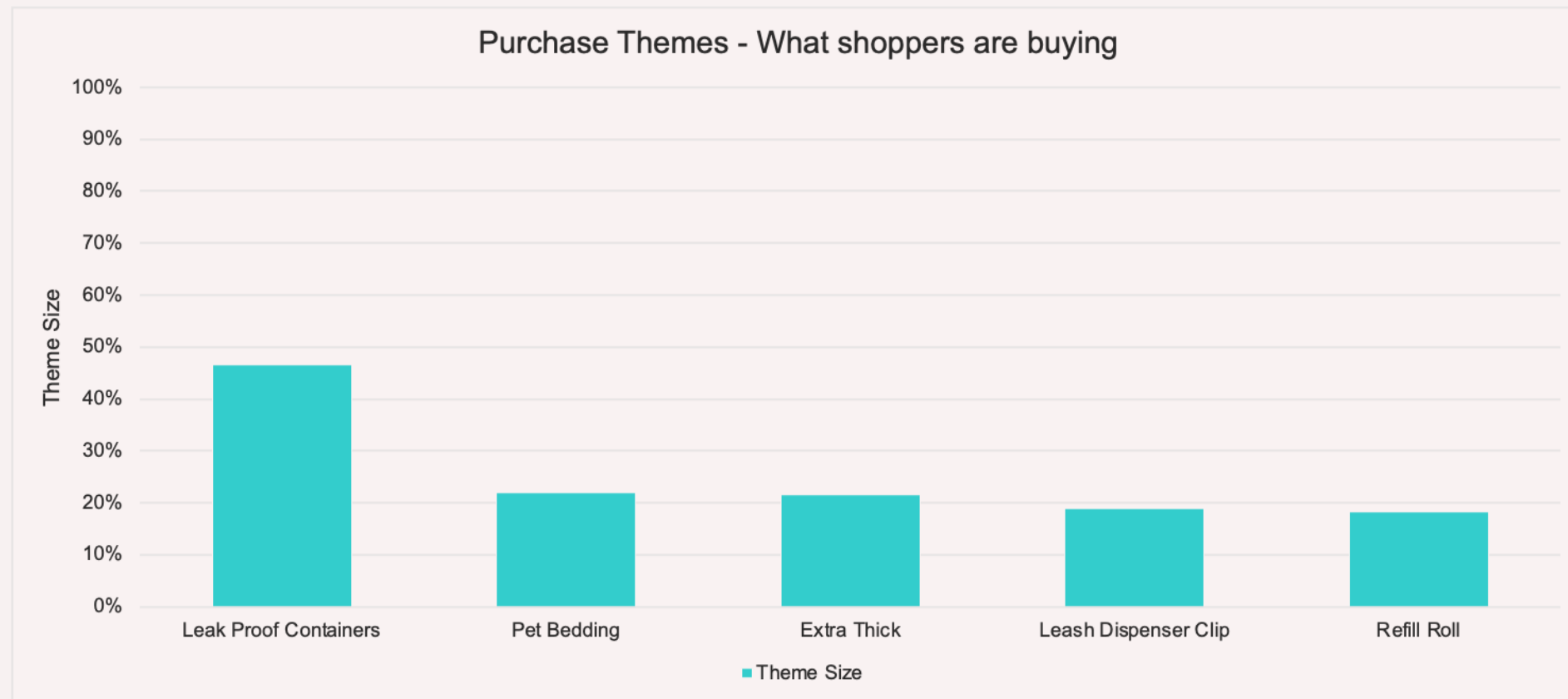
Q3 2024 E-commerce Presence Analysis for Pooper Scoopers and Bags



Takeaway

- Earth Rated experienced the highest growth in presence with organic presence growing by 0.6% and sponsored presence by 0.8%
- Greener Walker experienced a decline in organic presence by 0.1%, but sponsored presence increased by 0.4%

What shoppers are buying



Takeaway

- Leak Proof Containers theme has the highest category share at 46.5%
- Pet Bedding and Extra Thick Bags are other top themes with share of voice of 21% each

What shoppers are buying



Takeaway

- Stainless Steel has the highest category share at 41.1%
- Automatic Dispenser and Plate Sizes are the next top themes with 26% and 22% respectively

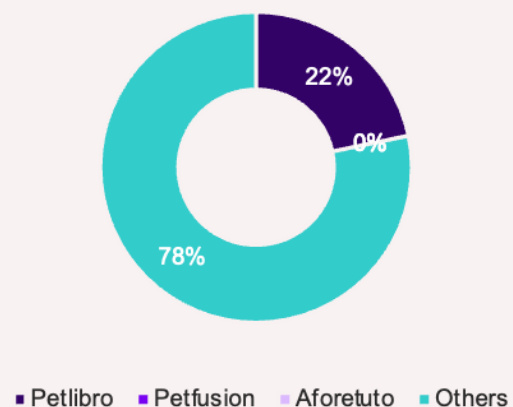
What shoppers are buying



Takeaway

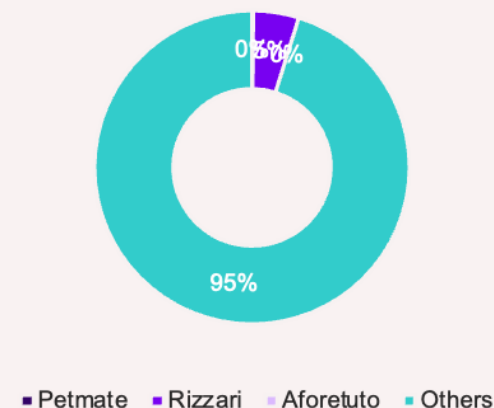
Stainless Steel Containers

Top Brand Share



Size Large

Top Brand Share



- Rizzari leads in Size Large with 4.69% share
- Petlibro dominates Stainless Steel Containers with 21.73% share
- Size Large theme is highly contested with top 3 brands holding 46.9% share

What shoppers are buying



Takeaway

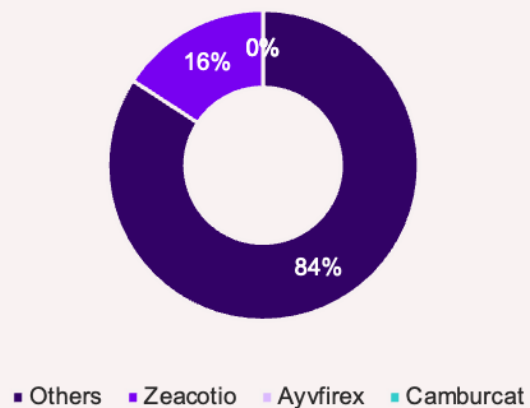
- Automatic Self Cleaning has the highest category share at 16.9%
- Clumping and App Control are some other top title themes with 14.2% and 12.1% share each

What shoppers are buying

Zeacotio dominates in App Control and Automatic Self with no competition from other brands

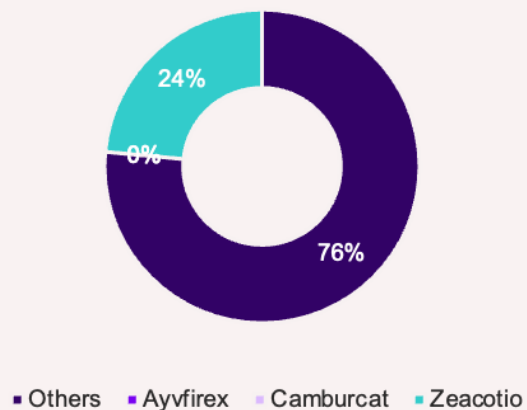
Automatic Self Cleaning

Top Brand Share



App Control

Top Brand Share

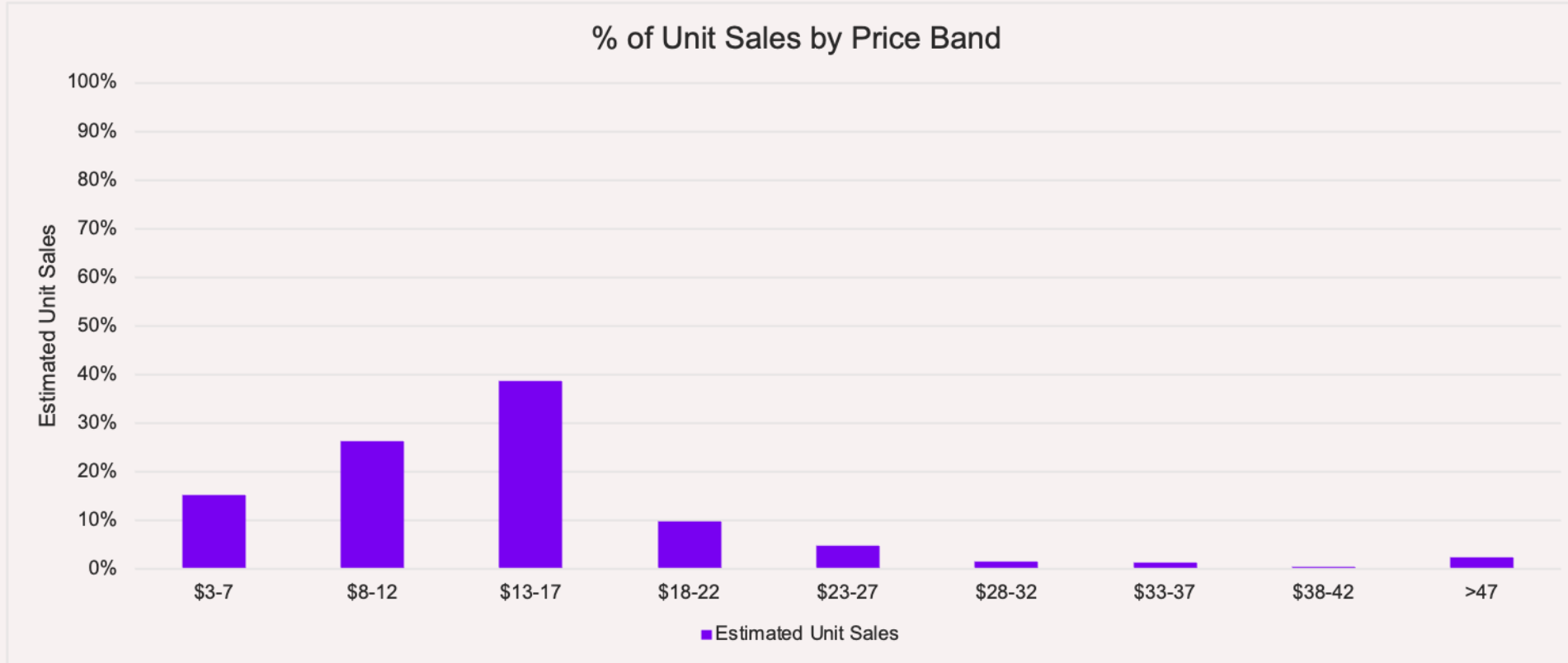


Takeaway

- In the App Control theme, Zeacotio holds a 23.5% share
- In the Automatic Self theme, Zeacotio holds a 15.8% share

Pricing Architecture – Unit Sales by Price Band

Price Band Analysis

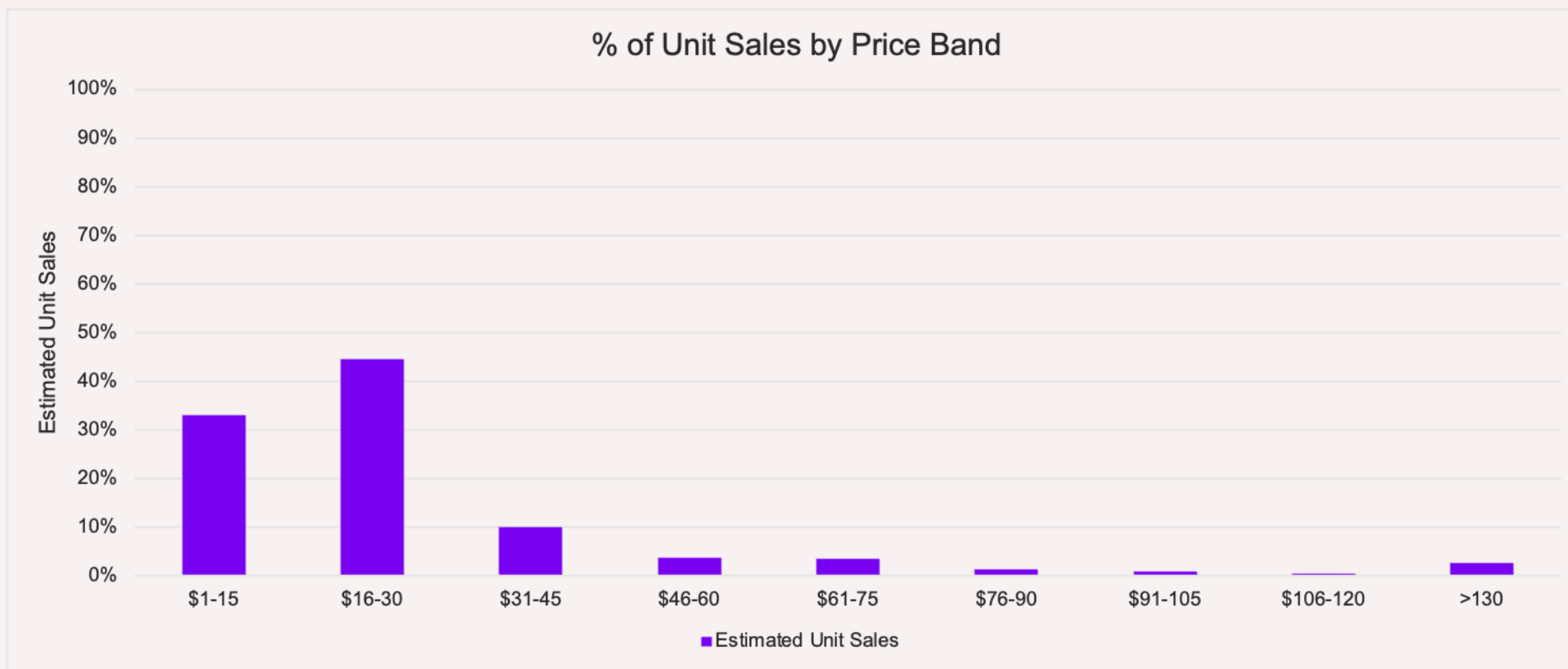


Takeaway

- 65% of overall units sold are in \$13-17(39%) and \$8-12(26%) price bands
- Tail price bands \$38-42, \$33-37, and >\$47 contribute 3% units and 11% revenue
- \$13-17 price band contributes 39% units and 38% revenue; Earth Rated dominates

Pricing Architecture – Unit Sales by Price Band

Price Band Analysis

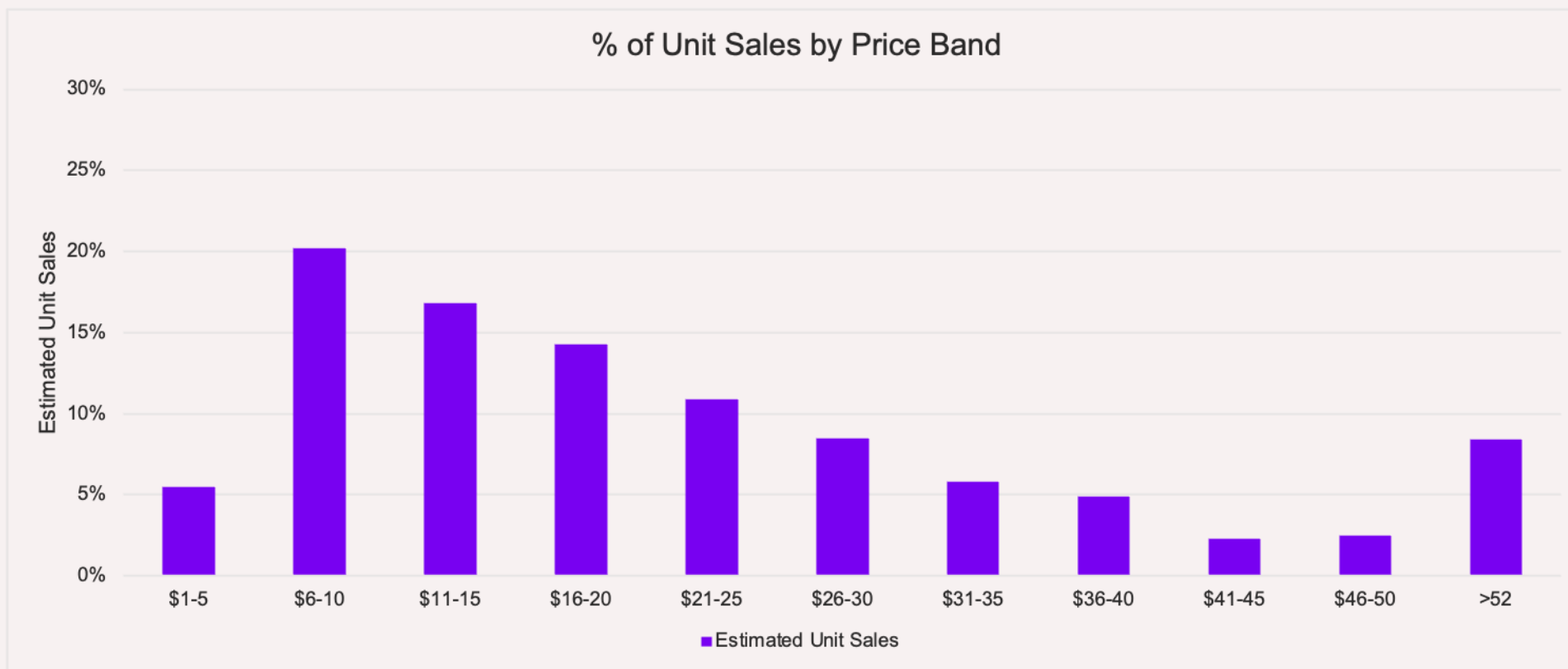


Takeaway

- 78% of overall units sold are in \$1-15 (33%) and \$16-30 (45%) price bands
- Tail price bands contribute 4.5% of units and 7.2% of revenue
- \$16-30 price band contributes 45% of units and 32% revenue

Pricing Architecture – Unit Sales by Price Band

Price Band Analysis for Category



Takeaway

- 37% of overall units sold are in \$6-10 (20%) and \$11-15 (17%) price bands
- Tail price bands (\$41-45, \$46-50, >\$52) contribute 12% of units and 35% of revenue
- >\$42 price band contributes 8% of units and 26% of revenue, dominated by Wonder Creature

Trending New Product Launches

Competitors are gaining traction with new product launches in pet waste management.

ASIN Name	SKU	Brand	Release Date	Price	Revenue	Category Rank
Mutt Mitt® 2-Ply dog waste pick-up bags Dispense-A-Mitt™ - 200 Dog Waste Bags in a wall mountable box.	B0D4GK3CTG	Mutt Mitt	2024-05-20	50.0	517.8K	1.3K
Mutt Mitt® 2-Ply dog waste pick-up bags Dispense-A-Mitt™ - 200 Dog Waste Bags in a wall mountable box.	B0D4GK3CTG	Mutt Mitt	2024-05-20	50.0	517.8K	1.3K

Trending New Product Launches

Significant Revenue Growth in Pet Care Products Post New Launches

ASIN Name	SKU	Brand	Release Date	Price	Revenue	Category Rank
PETLIBRO Automatic Cat Feeder Wet Food Refrigerated New Upgraded APP Control,3 Days Freshness 3 Meals,Semiconductor Cooling&Quick Chills Wet Food Dispenser,Polar WiFi Timed Auto Pet Feeder for Cat Dog	B0D6FMD45L	Petlibro	2024-06-11	119.9	738.4K	369.0
PETLIBRO Dog Water Fountain, 2.1Gal/8L Capsule Dog Fountain for Medium to Large Dogs, Anti-Splash Dog Water Bowl Dispenser, Ultra-Quiet Pet Water Fountain Easy to Clean	B0D1JM3DHZ	Petlibro	2024-06-06	56.5	655.7K	434.0
PETLIBRO Automatic Cat Feeder Wet Food Dispenser Refrigerated APP WiFi Control,3 Days True Freshness 3 Meals,Semiconductor Cooling&Quick Chills Gravy Wet Food Polar Timed Auto Pet Feeder for Cat Dog	B0CQ5D823D	Petlibro	2024-04-24	124.8	596.4K	487.0

Trending New Product Launches

Significant Revenue Growth in Self Cleaning Litter Box Category Post-Launch

ASIN Name	SKU	Brand	Release Date	Price	Revenue	Category Rank
Self Cleaning Litter Box -110L Automatic Cat Litter Box Self Cleaning, All Litter Can Use, with 1 Roll Garbage Bags and Mat, App Control, Big Grey..	B0D9QCKGFQ	Zeacotio	2024-07-19	344.3	10.1M	16.0
Self Cleaning Litter Box -110L Automatic Cat Litter Box Self Cleaning, All Litter Can Use, with 1 Roll Garbage Bags and Mat, App Control, Big Grey..	B0D9QCKGFQ	Zeacotio	2024-07-19	344.3	10.1M	16.0
Self Cleaning Litter Box Large Capacity, Automatic Cat Litter Box Open-Top Design for Multiple Cats with Integrated Safety Protection	B0D17D9GLN	Furoomate	2024-04-09	288.3	5.0M	65.0



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