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Global Pet Care Pads Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Pet Care Pads market size is expected to reach $ 2226 million by 2032, rising at a market growth of 7.4% CAGR during the forecast period (2026-2032).

Pet Care Pads are flat absorbent hygiene products designed to collect pet urine, secretions and other fluids while protecting floors, bedding, crates, carriers and professional care surfaces. The product structure typically combines a liquid-permeable top layer, an absorbent core containing fluff pulp, absorbent paper or superabsorbent polymer, and a waterproof or water-resistant backing. Washable products generally use reusable textile absorbent layers with a non-slip waterproof base. The market primarily covers disposable and washable formats, with products differentiated by unfolded area, absorption capacity, replacement frequency, odor-control performance, fixing structures and urine-observation features. Common sizes range from compact pads with an unfolded area of up to 0.20 square metres to extra-large formats exceeding 0.50 square metres. Major uses include puppy house training, routine indoor toileting, senior and chronic incontinence care, whelping and neonatal care, veterinary and postoperative recovery, and protection during travel or confinement. Pet Care Pads are distributed through pet specialty retailers, mass retailers, supermarkets, online platforms, veterinary channels and professional breeding or boarding facilities.

Key Findings

Global Pet Care Pads sales reached approximately 17,650 Million Pieces in 2025 and are projected at 18,710 Million Pieces in 2026

The weighted average selling price increased from approximately US$0.0745

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per piece in 2025 to US$0.0753 per piece in 2026

Disposable pads account for the vast majority of unit demand while washable pads contribute substantially higher value per piece

China North America and Japan represent the principal manufacturing consumption and product innovation centres

Market Trends

Pet Care Pads are progressing from basic fluid collection products toward differentiated hygiene and health-management solutions. Product development is increasingly focused on rapid liquid capture, stronger edge-leak protection, extended replacement intervals, activated-carbon odor control, adhesive fixing structures and white or colour-responsive surfaces that make visible urine abnormalities easier to observe. Major manufacturers are also introducing bamboo pulp, reduced-plastic structures and other environmentally positioned materials, although environmental claims remain less standardized than size and usage-cycle classifications. Washable pads are gaining visibility in senior-pet care, whelping and repeated indoor use, while disposable products continue to dominate frequent replacement scenarios. The long-term direction is toward thinner products with higher absorption efficiency, clearer functional positioning and formats tailored to apartment living, large dogs, multi-pet households and mobile pet care.

Market Dynamics

Drivers

Growth is supported by the increasing number of pet-owning households, greater indoor pet keeping, higher expenditure on essential hygiene products and the expanding population of senior pets requiring continence support. In the United States, dog ownership reached approximately 71 million households in 2025, while China’s urban dog and cat population exceeded 126 million. The normalization of pet-friendly travel, boarding, veterinary recovery and apartment-based pet ownership is broadening demand beyond conventional puppy training. Frequent replacement patterns also make disposable Pet Care Pads a recurring household purchase rather than an occasional accessory.

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Restraints

The market remains exposed to fluctuations in fluff pulp, superabsorbent polymer, nonwoven fabric, tissue and polyethylene-film costs. Standard disposable pads have relatively limited technical differentiation, enabling consumers and retailers to switch between suppliers and placing continuous pressure on contract-manufacturing prices. Large package sizes, promotional pricing, retailer private labels and online price transparency further restrict pricing power, while increasing scrutiny of disposable plastics may raise material-development and compliance costs.

Opportunities

Higher-value opportunities are emerging in odor-control pads, extended-use formats, adhesive products, urine-observation surfaces and washable pads for senior, postoperative and whelping care. China, Southeast Asia and India provide room for greater household penetration, while established markets offer premiumization opportunities through larger sizes, stronger absorption and more specialized care positioning. Growth in e-commerce and retailer-owned brands also creates opportunities for manufacturers capable of rapid product development, private-label customization and flexible packaging configurations.

Challenges

Competition is intensified by the coexistence of global hygiene groups, pet-specialty brands, retailer private labels and numerous Asian OEM and ODM manufacturers. Brand owners must maintain product consistency across different factories, while manufacturers face customer concentration, tariff exposure and frequent price negotiations. Differences in absorbency claims, pad-size naming and environmental terminology make cross-brand comparison difficult and may weaken consumer trust when functional performance is not supported by consistent testing.

Industry Chain Analysis

The upstream chain consists mainly of fluff pulp, tissue, superabsorbent polymer, nonwoven fabric, waterproof film, adhesives, fixing materials, fragrances, activated

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carbon and packaging. Disposable pads are produced through high-speed web forming, absorbent-core distribution, layer lamination, edge sealing, cutting, folding and automated packing. Washable pads rely more heavily on textile processing, absorbent-layer assembly, waterproof membrane lamination and sewing. Raw materials and manufacturing efficiency determine most of the cost base for standard products, while functional additives, specialized structures, packaging and brand positioning contribute a larger share of value in premium products.

The midstream is characterized by substantial separation between manufacturing and brand ownership. China is the largest export-oriented manufacturing base, supported by automated production lines and extensive OEM and ODM capabilities. One leading Chinese manufacturer reported annual Pet Care Pads capacity approaching 4,900 Million Pieces by the end of 2025 and continued expanding production in Cambodia, demonstrating the scale required to serve international retailers and high-frequency replenishment programmes. Downstream value is captured by brand companies, pet-specialty chains, mass retailers, e-commerce platforms, veterinary suppliers and professional care facilities. Manufacturing profitability is generally driven by capacity utilization, material procurement and order scale, whereas brand and channel profitability depends more heavily on product differentiation, customer acquisition and retail positioning.

Segment Insights

Disposable Pet Care Pads remain the dominant product type because they match the hygiene expectations and frequent replacement patterns associated with house training and routine indoor toileting. Washable Pet Care Pads represent a smaller volume segment but achieve substantially higher prices per piece and stronger relevance in repeated-use settings such as senior-pet care, whelping boxes and postoperative resting areas. Their adoption depends on washing convenience, drying time, odor retention and durability rather than only initial purchase price.

By unfolded area, products of up to 0.30 square metres are concentrated in small-dog households, compact living environments and frequent-change applications. Formats above 0.30 square metres are more important for medium and large dogs, multi-pet homes, crates and floor-protection applications, while products exceeding 0.50 square metres generally carry higher absolute prices and stronger absorption requirements. Size segmentation based on actual unfolded area is more suitable for quantitative comparison than manufacturer labels such as Regular, Wide, Large or XL, which vary

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considerably among brands.

Downstream Market Opportunities

House training and routine indoor toileting remain the core sources of recurring volume, but the most attractive incremental opportunities are developing in senior and chronic incontinence care, veterinary recovery, neonatal and whelping care, and travel protection. These applications require stronger leakage control, larger usable areas, stable fixing and improved odor management, supporting higher product specifications. Boarding facilities, breeders, veterinary clinics and pet-friendly transport services also provide professional demand that is less dependent on household training cycles and more closely linked to sanitation standards and operating efficiency.

Regional Insights

China and North America are the two largest regional demand centres in unit terms, but their industry roles differ. China combines a rapidly developing domestic consumer market with the world’s most extensive export-oriented OEM and ODM manufacturing base. North America is characterized by large package sizes, strong e-commerce penetration and significant influence from retailer-owned brands. The United States had approximately 71 million dog-owning households in 2025, supporting broad recurring demand for training, indoor toileting and senior-care products.

Japan has a smaller dog population but comparatively intensive pad use, supported by small-dog ownership, indoor living and mature hygiene habits. Europe represents a broad but fragmented market, with nearly 90 million dogs and considerable variation in indoor-use habits among countries. South Korea and China Taiwan favour compact, functional and premium products, while Southeast Asia and India remain earlier-stage demand markets with growing e-commerce availability. Southeast Asia is also becoming more important as an alternative manufacturing location as Chinese suppliers diversify production capacity.

Competitive Landscape Analysis

The competitive landscape is fragmented at the brand and retail level but more concentrated in large-scale manufacturing. The verified core supplier group includes

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global hygiene manufacturers, Japanese pet-care specialists, North American retailer-owned brands, European pet-product companies, Korean functional-product suppliers, Indian emerging brands and Chinese manufacturers with both private-label and proprietary-brand operations. Japanese groups generally compete through absorption technology, odor management and product refinement, while North American retailers use purchasing scale, private-label pricing and broad channel coverage. European suppliers emphasize pet-specialty distribution and diversified regional portfolios. Chinese manufacturers hold advantages in automated capacity, cost control, product customization and rapid delivery, and increasingly combine OEM and ODM operations with proprietary brands. Competition is moving beyond basic price and absorption toward supply-chain resilience, overseas production, functional differentiation, environmental positioning and the ability to serve major retail customers with frequent replenishment and multiple package specifications.

Report Scope

This report studies the global Pet Care Pads production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Pet Care Pads and provides market size (US$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Pet Care Pads that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Pet Care Pads total production and demand, 2021-2032, (M Pieces)

Global Pet Care Pads total production value, 2021-2032, (USD Million)

Global Pet Care Pads production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (M Pieces), (based on production site)

Global Pet Care Pads consumption by region & country, CAGR, 2021-2032 & (M Pieces)

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U.S. VS China: Pet Care Pads domestic production, consumption, key domestic manufacturers and share

Global Pet Care Pads production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (M Pieces)

Global Pet Care Pads production by Type, production, value, CAGR, 2021-2032, (USD Million) & (M Pieces)

Global Pet Care Pads production by Application, production, value, CAGR, 2021-2032, (USD Million) & (M Pieces)

This report profiles key players in the global Pet Care Pads market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Amazon.com, Inc., Walmart Inc., Target Corporation, Costco Wholesale Corporation, Chewy, Inc., Petco Health and Wellness Company, Inc., PetSmart LLC, Tractor Supply Company, Central Garden & Pet Company, Compana Pet Brands, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Pet Care Pads market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (M Pieces) and average price (US$/Piece) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Pet Care Pads Market, By Region:

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United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Pet Care Pads Market, Segmentation by Type:

Disposable Pet Care Pads

Washable Pet Care Pads

Other

Global Pet Care Pads Market, Segmentation by Unfolded Area:

Up to 0.20 m^2

More than 0.20 m^2 to 0.30 m^2

More than 0.30 m^2 to 0.50 m^2

More than 0.50 m^2

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Global Pet Care Pads Market, Segmentation by Pack Size by Piece Count:

Up to 30 Pieces

31 to 60 Pieces

61 to 100 Pieces

More than 100 Pieces

Global Pet Care Pads Market, Segmentation by Application:

Puppy House Training

Routine Indoor Toileting

Senior and Chronic Incontinence Care

Whelping and Neonatal Care

Veterinary and Postoperative Care

Travel and Confinement Protection

Other

Companies Profiled:

Amazon.com, Inc.

Walmart Inc.

Target Corporation

Costco Wholesale Corporation

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Chewy, Inc.

Petco Health and Wellness Company, Inc.

PetSmart LLC

Tractor Supply Company

Central Garden & Pet Company

Compana Pet Brands

The Hartz Mountain Corporation

Fetch for Pets, LLC

Bulldogology Pet Solutions

Pet Parents LLC

Unicharm Corporation

Daio Paper Corporation

IRIS OHYAMA Inc.

Kocho Co., Ltd.

C's Ishihara Co., Ltd.

Lion Pet Co., Ltd.

Petio Corp.

Bonbi Alcon Co., Ltd.

AKS Inc.

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TRIXIE Heimtierbedarf GmbH & Co. KG

Beaphar B.V.

SAVIC nv

CAMON&CROCI Pet Group S.p.A.

Flamingo Pet Products NV

Rinaldo Franco S.p.A.

Nobby Pet Shop GmbH

Lilmar MAELSON GmbH

Celmax Italia S.r.l.

Tianjin Yiyi Hygiene Products Co., Ltd.

U-PLAY CORPORATION

Jiangsu Zhongheng Pet Articles Joint-stock Co., Ltd.

DK Korea Co., Ltd.

AMONS

Kobi Mountain Co., Ltd.

START Co., Ltd.

Earth Paws Private Limited

Pet Mafia Private Limited

Huaworld

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Key Questions Answered

1. How big is the global Pet Care Pads market?
2. What is the demand of the global Pet Care Pads market?
3. What is the year over year growth of the global Pet Care Pads market?
4. What is the total value of the global Pet Care Pads market?
5. Who are the Major Players in the global Pet Care Pads market?
6. What are the growth factors driving the market demand?

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