

Market Development

MARKET BRIEF

ON

**ACCESSORIES FOR PETS
AND COMPANION ANIMALS**

OVERVIEW OF THE EUROPEAN UNION

ITC



INTERNATIONAL TRADE CENTRE UNCTAD/WTO

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GENEVA

1996

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(Prepared by F.O. Marsh, Marsh Business Services)

M.DPMD/97/275

PET ACCESSORIES

OVERVIEW OF THE EUROPEAN UNION MARKET

General

The pet trade and industry comprise of a number of interrelated sectors - livestock, pet food (including live food for pets, pet health & care products), pet accessories and pet-related services. This market brief focuses only on pet accessories.

Product Description

Approximately 10,000 to 12,000 items are included under the general heading of 'pet accessories' when the many variations in design, shape, materials and colour are taken into consideration. At the retail level these accessories are usually classified under end-user headings:

- C accessories for dogs
- C accessories for cats
- C grooming aids for dogs and for cats
- C accessories for 'other small animals' which, in Europe, includes 'cavies' i.e. guinea pigs, hamsters, chinchillas, mice, rabbits & dwarf rabbits, ferrets and hermit crabs
- C accessories for amphibians which cover 4,100 species such as - toads & frogs, which includes an insect sub-sector - ants, beetles, arachnids e.g. scorpions and spiders; under the heading of reptiles are included some 6,600 species e.g. snakes, lizards, iguanas, turtles/tortoises. In Europe, they are usually included under the heading of 'other small animals'
- C accessories for cage birds, ornamental poultry e.g. waterfowl, pheasants, etc. and wild birds
- C accessories for ornamental fish or 'wet pets', which includes both freshwater and saltwater or marine fish
- C accessories of a more general kind, such as gifts and souvenirs both for pets and for their owners.

(See Annex 1 for a list of products).

In the USA the pet trade has a distinct pet category to describe - chinillas, chipmunks, donkeys, miniature donkeys, flying squirrels, goats, pygmy goats, miniature horses, hedgehogs, kinkajous or honey bears, waltzing mice, monkeys, opossums, pot bellied pigs, racoons, skunks, squirrels and woodchucks. These are collectively known as 'exotics'. In Europe, unless separately identified, they are usually included under the heading of 'other small animals'.

It is virtually impossible to separate the pet accessories which are used for animals not kept as pets. These animals include racing pigeons, considered to be a sport, likewise greyhounds for greyhound racing. Accessories used with 'working animals' such as guide dogs for the blind; farm, sheep and hunting dogs; guard dogs and dogs used by the military, police and for drug enforcement. Also accessories for rabbits which are bred and reared for food and fur.

Market Characteristics

The European Community market for pet supplies and accessories represents approximately one-third by value of the total world market. Europe is also the largest single import market for pet products in the world.

There are around 144 million households in the 15 countries of the European Union, as well as the two non-EU countries Norway and Switzerland. Of these, around 48% or 69 million households keep at least one pet. The total number of pets is 145 million, excluding ornamental fish. In 1996 the retail value of the European market for pet accessories was US\$2,979 million. (See Annex 2 for details of national markets) and (Annex 3 for details of the number of pets per country).

The accessories market is highly fragmented and supplied by a large number of businesses, many of which are small and part of the cottage or artisan industries. While many pet accessories are produced in various countries in Europe, Eastern Europe and the USA, considerable quantities are imported from Asia and South East Asia including - Bangladesh, China (including the Province of Taiwan), Hong Kong, Indonesia, Japan, Philippines, Singapore, Sri Lanka and Thailand. There are still only very limited imports from countries in Africa, Oceania, Central and South America. Although almost all these countries have suitable raw material and could supply pet accessories, neither entrepreneurs nor government export trade promotion agencies have taken effective steps to create awareness of export opportunities for pet accessories.

There is only a limited degree of consumer brand consciousness within the pet accessory sector. In this respect the pet accessory market is very different from the pet food market where consumer brand consciousness is highly developed due to enormous promotional activities by the large multi-national petfood companies. However the number of multi-national companies who are marketing pan-European pet accessory brands is increasing. Major companies include Vitakraft, Hagen, Ferplast and Bogdahn Technik (Flexi brand). A growing number of pet product wholesalers, central purchasing organisations, franchise chains and pet retail chains including pet supermarkets, and even grocery chains, market pet accessories under their own label i.e. private-label or own-brand products.

Cat litter is probably the largest single accessory product group. In 1996 pan-European consumption was in excess of 1,200,000 tonnes with an estimated retail value of US\$400 million. Cat litter is mainly mineral-based material such as attapulgite, sepiolite, gypsum, bentonite diatomite and Fullers' earth. Vegetable-based materials include cereal fibres, various types of wood shavings and sawdust as well as other wood and maize by-products. It also includes paper-based products, such as recycled and reprocessed newspapers.

It should be noted that in some European countries, statistics about pet health & care products e.g. antiparasitic or flea collars for dogs and cats, are incorporated in pet accessory data.

In Europe over 130 different models of bird cages are available in more than 270 different colours.

Every person who keeps ornamental fish needs some accessories. There is a market for special aquarium gravel and rocks. One-third of aquarium and fish tank owners buy aquarium plants and more than 300 different species of aquarium and pond plants are sold in Europe.

Prices

Retail prices are based on the characteristics of the product and influenced by factors such as raw material used, quality of workmanship, scale or size of production and country of origin. In view of the large number of different products it is therefore not possible to indicate market prices.

The wholesale margins on pet accessories are in the range of 10% and 25%. The average gross margin realised by retail pet shops for accessories ranges between 30% to 50%, to compensate for the relatively small volume purchases. Margins also depend on whether products are slow or fast moving. The margin for cat litter, for example, since it is perceived as a fast moving commodity product, is at the lower end of the scale. The margins for pet accessories are usually much greater than those realised by pet food in the grocery sector which are in the range of 7% to 20%.

Market Access

Exporters should also be aware of the EC Directives and ISO 9000 elements. EC directives aim at both a minimum safety level in Europe and free trade throughout the European Union. The ISO 9000 basis is to meet customer requirements and expectations.

As the majority of pet accessories cannot be identified under either SITC-based nor under the HS (Harmonised System) product codes headings, reference to customs tariffs and duties is outside the scope of this market brief.

Imports originating in ACP or least developed countries are normally exempt from customs duties. Exporters should contact customs authorities or importers for details.

Packaging

The type of packaging used should take into consideration protection of goods from physical damage. Some items for retail sale require attractive, eye-catching, presentation packs. Some of the products for sale in grocery and/or pet supermarkets may have to be presented in blister-packs and be bar-coded.

There is not, as yet, any common European directive on packaging or packaging waste. This means that exporters to countries within the EU will have to deal with different national regulations. The simplest way to comply with national laws is to discuss this matter with the importer.

Trade Channels

Intermediaries include agents, importers and wholesalers. In some countries there are large central buying groups and pet chain stores with considerable purchasing power.

(1) **Specialised retail outlets**

These account for around 80% of all pet accessory sales. Outlets under this heading include:

- C retail pet shops and pet supermarkets
- C garden centres
- C DIY (Do-It-Yourself) shops
- C shops selling hunting and fishing/angling accessories
- C pet grooming parlours
- C seed & grain merchants
- C mail-order firms and home-delivery services
- C pet breeders
- C dog boarding kennels and catteries
- C veterinary centres which sell pet accessories
- C the agricultural distribution network which includes merchants, farm stores and self-service shops

A recent trend in Europe is home shopping i.e. shopping without leaving one's home. Pet owners use their telephone, TV, the Internet or CD-ROM to view the products, and then using a computer or a telephone, order any product and have it delivered.

(2) **The grocery channel**

This has approximately 20% market share of all pet accessory sales, although in some countries its share is considerably higher. In northern Europe only the accessories that can be described as FMCG (Fast Moving Consumer Goods) are sold through grocery outlets and then mainly by the mass merchandisers i.e. hypermarkets and supermarkets. Other outlets include discount stores, cash & carry stores, department and variety stores, and market and mobile traders. In many countries petrol stations also sell pet accessories in their forecourt shops.

There are around 21,000 retail pet shops in Europe which includes a growing number of pet supermarkets and superstores. In each of the larger countries France, Germany, Italy, Spain and the United Kingdom, there are in the region of 3,000 pet shops.

Pet shops stock a wide range of accessories, usually several hundred, while the number of articles in a pet supermarket could exceed 8,000. In some countries, grocery outlets usually only sell pre-packaged accessories and their range is limited to around 50 items. The number of articles stocked by major pet accessory wholesalers is in the range of 5,000 to 8,000.

Sales promotion

Standard promotional methods are used. Trade fairs and the trade media are among the more effective. Details about trade fairs and titles of trade publications are provided under the section 'Useful Addresses'.

Commercial practices

Import prices are generally quoted CIF or FOB. Payment is usually on a cash against document (CAD) basis. It is essential that exporters provide potential buyers with visual representations and detailed specifications of their products by means of leaflets, brochures or catalogues.

Market prospects

During the 5 year period 1996 - 2001 the market in the 17 European countries is forecast to grow by 5.3% to US\$3,137 million in constant 1996 dollar value.

Note: The markets in Eastern Europe e.g. Poland, Czech Republic, Slovak Republic and Russia do not form part of this overview. Nevertheless, they are forecast to show considerable growth potential. Trade estimates indicate that annual sales of pet products in the Moscow region of Russia are around \$50 million a year of which accessories represent 15%. Pet trade fairs are already being staged in Moscow, Russia and in Lodz, Poland.

Socio-economic, demographic and environmental factors will lead to further decline in the dog population and increased cat ownership. In the various countries fashion-driven changes, such as changes in the popularity for different size and breeds of dogs will continue. As living standards increase, so will the amount of money spent on pet accessories and services.

Sources of Information

- C Eurostat - Statistical Office of the European Communities, Luxembourg
- C Contact with manufacturers, traders, experts, trade associations, trade fair catalogues, visits to trade fairs
- C Published pan-European market research reports by Datamonitor, Euromonitor and Marsh Business Services
- C International Customs Journal No. 14, Rue de l'Association 38, Brussels, Belgium

Useful Addresses

Trade Fairs

PETINDEX

9 Tufton Street, Ashford,
Kent TN23 1QN, United Kingdom
Tel: (44) 1233 621877
Fax: (44) 1233 645669

DIBEVO

P.O. Box 94,
3800 AB Amersfoort, Netherlands
Tel: (31) 33 455 04 33
Fax: (31) 33 455 28 35

ANIDO

Doorniksesteenweg 216,
8500 Kortrijk, Belgium
Tel: (32) 56 204000
Fax: (32) 56 217930

SIZOO

Fira de Barcelona, Avda. Reina Maria
Cristina s/n, 08004 Barcelona, Spain
Tel: (34) 3 423 3101
Fax: (34) 3 426 6025

INTERZOO

Wirtschaftsgemeinschaft
Zoologischerfachbetriebe GmbH
P.O. Box 1420,
63204 Langen, Germany
Tel: (49) 6103 91070
Fax: (49) 6106 910733

SWEDE PET EXPO

Tmc Information Company,
P.O. Box 12089,
10223 Stockholm, Sweden
Tel: (46) 8 652 7980
Fax: (46) 8 654 1275

EXPOZOO

BEPP, 44 Avenue George V,
75008 Paris, France
Tel: (33) 149 52 14 20
Fax: (33) 149 52 14 40

EXPOZOO

Feira Internacional de Porto,
4450 Leca da Palmeira, Portugal
Tel: (351) 2 998 1400
Fax: (351) 2 995 7499

ZOOMARK

Vimax srl, Via Rezzonico 23,
22100 Como, Italy
Tel: (39) 31 301 059
Fax: (39) 31 301 418

- Notes:*
- (1) A number of pet product manufacturers, importers and distributors also display their goods at other trade fairs, such as: garden trade fairs, flower trade fairs and leisure trade fairs.
 - (2) In every country there are also pet shows (for dogs, cats, cage birds, ornamental fish, etc.) as well as pet grooming shows, where manufactures and distributors of pet accessories take trade stands. These events are mainly for the general public.
 - (3) Smaller trade fairs are also held in the smaller European countries e.g. Switzerland, as well as in Eastern Europe e.g. Czech Republic, Poland, Russia. Generally these fairs are open to the general public as well as to the trade.

Trade Journals

HobbyZoo
Vimax s.r.l.
P.O. Box 551, 22100 Como 4, Italy
Tel: (39) 31 301059
Fax: (39) 31 301418

Trend
Via Cretese 12,
20156 Milan, Italy
Tel: (39) 2 3800 2901
Fax: (39) 2 3800 3467

ZZA (Zoologischer Zentral Anzeiger)
Rheinstrasse 35,
63225 Langen, Germany
Tel: (49) 6103 9107 20
Fax: (49) 6103 9107 33

Pet-Eurofachmagazin
Dähne Verlag GmbH,
P.O. Box 250, 76256 Ettlingen, Germany
Tel: (49) 7243 575 0
Fax: (49) 7243 575200

Das Branchen Forum
Branchen-Fachverlag P. Ulrich,
Häuserweg 2 - 4, 36211 Alheim, Germany
Tel: (49) 5664 94930
Fax: (49) 5664 7758 & 7791

Pet Business World
9 Tufton Street, Ashford,
Kent TN23 1QN, United Kingdom
Tel: (44) 1233 621877
Fax: (44) 1233 645669

Pet Product Marketing
EMAP Apex Publications,
Apex House, Oundle Road
Peterborough PE2 9NP, United Kingdom
Tel: (44) 1733 898100
Fax: (44) 1733 980657

Animalerie
BEPP, 44 Avenue George V,
75008 Paris, France
Tel: (33) 1 49 52 14 06
Fax: (33) 1 49 52 14 42

Animal Distribution
P.O. Box 30,
78511 Rambouillet, France
Tel: (33) 1 34 84 70 60
Fax: (33) 1 34 84 70 56

DIBEVO-Vakblad
P.O. Box 94,
3800 AB Amersfoort, Netherlands
Tel: (31) 33 455 04 33
Fax: (31) 33 455 28 35

PETS EUROPE,
InterMedium Publishers b.v.,
P.O. Box 1176,
3600 BD Maarssen, Netherlands
Tel: (31) 346 555 266
Fax: (31) 346 550 865

Groomers Europe
InterMedium Publishers b.v.,
P.O. Box 1176,
3600 BD Maarssen, Netherlands
Tel: (31) 346 555 266
Fax: (31) 346 550 865

ANIMALIA
Elsevier Prensa SA,
Avda. Parallel 180,
08015 Barcelona, Spain
Tel: (34) 3 325 5350
Fax: (34) 3 425 2880

Trade Directories

The International Buyers' Guide
InterMedium Publishers b.v.
P.O. Box 1176,
3600 BD Maarssen, Netherlands
Tel: (31) 346 555 266
Fax: (31) 346 550 865

(Belgian Pet Trade Federation)
Meersstraat 100,
9620 Zottegem, Belgium
Tel & Fax: (32) 9 360 0791

UK Pet Care Industry Year Book
and Buyers Guide
Pet Care Trust
170 Mile Road,
Bedford MK42 9TW, United Kingdom
Tel: (44) 1234 273933
Fax: (44) 1234 273550

Pet-Einkaufsführer
Dähne Verlag GmbH,
P.O. Box 250,
76256 Ettlingen, Germany
Tel: (49) 7243 575 0
Fax: (49) 7243 575200

Pense-Bete
Animal Distribution,
P.O. Box 30,
78511 Rambouillet-Cedex, France
Tel: (33) 1 34 84 70 60
Fax: (33) 1 34 84 70 55

Trade Associations

Pet Care Trust
170 Mile Road,
Bedford MK42 9TW, United Kingdom
Tel: (44) 1234 273933
Fax: (44) 1234 273550

Zentralverband Zoologischer Fachbetriebe
Deutschlands e.V.
(German Pet Trade Association)
Rheinstrasse 35,
63225 Langen, Germany
Tel: (49) 6103 9107 20
Fax: (49) 6103 9107 33

PRODAF
(French Pet Trade Federation)
2 Avenue Jean Moulin,
94120 Fontenay-sous-Bois, France
Tel: (33) 1 48 75 56 57
Fax: (33) 1 48 75 76 12

ANDIBEL

Allgemeine Bundesgremium Zoofachhandel
Österreich
(Austrian Pet Trade Association)
c/o Zum Tierfreund, Märzstrasse 86,
1150 Vienna, Austria
Tel: (43) 1 982 3472
Fax: (43) 1 982 34724

VZSF
(Swiss Pet Shop Federation - German-speaking)
Güterstrasse 199,
CH-4053 Basel, Switzerland
Tel: (41) 61 363 2570
Fax: (41) 61 363 2574

APREZ
(Swiss Pet Shop Federation - French-speaking)
P.O. Box 159, rue de Carouge 23,
CH-1211 Geneva 4, Switzerland
Tel: (41) 22 329 7049
Fax: (41) 22 329 7049

ZOORF (Swedish Pet Trade Federation)
P.O. Box 8221,
20041, Malmö, Sweden
Tel: (46) 40 929291
Fax: (46) 40 420843

DIBEVO - (Dutch Pet Trade Association)
P.O. Box 94
3800 AB Amersfoort
Netherlands
Tel: (31) 33 455 04 33
Fax: (31) 33 455 28 35

AEDPAC - (Asociacion Espanola de
Distribuidores de Productos para Animales
de Compania)
C/Mallorca 286,
08037 Barcelona, Spain
Tel: (34) 3 207 2516
Fax: (34) 3 207 1611

Norwegian Pet Trade Organisation
Bloddgaten 17,

4890 Grimstad, Norway
Tel: (47) 37 091888
Fax: (47) 37 043029

GPFMA (Greek Pet Food Manufacturers
Federation)
Vassileos Constantinou Avenue 30,
11335 Athens, Greece
Tel: (30) 1 723 1970
Fax: (30) 1 722 7965

JCFPFMI (Joint Committee)
Elintarviketeollisuus ry,
P.O.Box 115,
00241 Helsinki, Finland
Tel: (358) 9 148 871
Fax: (358) 9148 87201

**List of importers and wholesalers
(non-exhaustive)**

Austria

Vitakraft H. Wuehrman KG
Herziggasse 3,
1230 Vienna, Austria
Tel: (43) 1 869 3541 0
Fax: (43) 1 869 3544

H. Haslinger Import-Export
Erzherzog Karl Strasse 65 -71,
1220 Vienna, Austria
Tel: (43) 1 272 4348
Fax: (43) 1 272 4346

Belgium

Duval Pet Products/ L. Deckx bvba
Ambachtstreet 4,
2340 Beerse, Belgium
Tel: (32) 14 61 61 01
Fax: (32) 14 61 44 94

Flamingo NV
Bouwelven 16,
2280 Grobbendonk, Belgium
Tel: (32) 14 25 84 80
Fax: (32) 14 22 52 99

France

ARPA
3 rue Foulques Nerra,
49150 Bauge, France
Tel: (33) 2 41 82 77 48
Fax: (33) 2 41 82 75 68

GIE Zolux France
Zone Industrielle de l'Ormeau-de-Pied,
17100 Saintes, France
Tel: (33) 5 46 74 69 00
Fax: (33) 5 46 97 75 98

Savidan SA
20 rue Paul Cezanne,
91540 Mennecy, France
Tel: (33) 4 69 90 01 91
Fax: (33) 4 69 90 01 09

Germany

Egesa/Zookauf eG
Carl-Benz-Strasse 7 - 11,
35398 Giessen, Germany
Tel: (49) 641 9685 0
Fax: (49) 641 9685 163

Hagen Deutschland GmbH
25488 Holm, Germany
Tel: (49) 4103 9600
Fax: (49) 4103 961034

Schulze Heimtierbedarf GmbH
Findelsgrund 46,
32457 Porta Westfalica, Germany
Tel: (49) 571 7989711
Fax: (49) 571 7331

Italy

Camon s.r.l.
Via Seriga 11,
37041 Albaredo D'Adige (VR), Italy
Tel: (39) 45 660 0225
Fax: (39) 45 660 0206

Rinaldo Franco & Co Spa
Via Washington 83/85,
20146 Milan, Italy
Tel: (39) 2 489 52 995
Fax: (39) 2 489 53 767

Netherlands

Gebr. van Riel Groothandel
P.O. Box 633,
5140 AP Waalwijk, Netherlands
Tel: (31) 4160 32150
Fax: (31) 4160 42275

Dierengilde
Huis ter Heideweg 54,
3705 LZ Zeist, Netherlands
Tel: (31) 30 698 1610
Fax: (31) 30 698 1619

Spain

Surtropic S.L.
P.I. El Pino, D, 8 - 3, Nave 24,
41016 Seville, Spain
Tel: (34) 5 467 2498
Fax: (34) 5 467 6514

Switzerland

Etablissement Wüthrich
'En Chamard',
CH-1442 Montagny-pres-Yverdon,
Switzerland
Tel: (41) 24 445 81 65
Fax: (41) 24 445 31 20

Emile Baron S.A.
32 rue de Chene-Bougeries,
CH-1225 Chene-Bourg, Switzerland
Tel: (41) 22 348 2881
Fax: (41) 22 348 2855

United Kingdom

Armitage Brothers Plc
Armitage House, Colwick,
Nottingham NG4 2BA, United Kingdom
Tel: (44) 115 961 4984
Fax: (44) 115 940 4164

Melton Pet Supplies Ltd
Valley Way, Welland Valley Ind. Estate,
Market Harborough LE16 7PS
United Kingdom
Tel: (44) 1858 468468
Fax: (44) 1858 432800

Wundpets
wyford Orchard, London Road,
Twyford, Reading
Berks. RG10 9HQ, United Kingdom
Tel: (44) 118 940 1950
Fax: (44) 118 940 3535

Annex 1

Pet accessory products

1. Dogs

- C Animal toilets
- C Beds, baskets and bedding including mats, mattresses and cushions
- C Bones, chews, made both from natural materials e.g. cattle hide, pigs ears, rubber, etc. and from man-made materials e.g. polyurethane, vinyl, rope
- C Clothes including coats, raincoats, tracksuits, bathrobes, knitwear, hats, boutique & fashion wear (including neckwear and costume jewellery)
- C Collars, leads, choke chains and allied items including show collars made from leather, synthetic, reflective or rope
- C Car safety belts, car seats, car grills and barriers
- C Scoops and bags for dog faeces
- C Drinking bowls, feeding bowls and dishes, and place mats
- C Electronic training aids - fencing, training & correction collars, furniture protection cushions
- C Exercise pens
- C Harnesses
- C Housing - cages, kennels both fixed and collapsible, kennels signs, kennel heaters
- C Identity tags and tubes
- C Leads & retractable leads and muzzles made of leather, synthetic material or metal
- C Reflective safety attire - collars, etc.
- C Toys - made of rubber, plastic, latex, wood, rope, cotton as well as interactive toys
- C Travel carriers, baskets and bags made of wickerwork, cane, metal, plastic, wood, board, also 2-wheel carts & trailers attachable to bicycles
- C Training and dog handling equipment including protective clothing for dog trainers and handlers e.g. gloves, arm and leg protectors, suits, boots, training collars and leads, flexible batons, whistles audible and silent / special pitch

2. Cats

- C Beds, mats, cat houses, waterbeds
- C Cat furniture including scratching posts and climbing trees - single and multi-level, cat aerobic centres
- C Cat litter and absorbents made of alfalfa, mineral, wood shavings and sawdust, vegetable and paper-based material
- C Cat safety netting
- C Collars, harnesses and leads made from leather, rope, metal, synthetic and textile material
- C Cushions, mats and mattresses
- C Drinking bowls, feeding bowls and dishes made from aluminium, ceramic, plastic, stainless steel or stoneware
- C Electronic training aids - furniture protection cushions
- C Harnesses
- C Identity tags and collar bells
- C Litter pans/trays, trays, scoops and spoons
- C Pet flaps or doors
- C Toys
- C Travel carriers, baskets, cases and bags

3. Other small animals

- C Bedding & nesting material
- C Cage floor material and absorbents including litter, wood shavings & chips, sawdust, compressed hay & straw, paper pellets
- C Cage heaters, ornaments and toys, and exercise equipment including wheels
- C Drinking vessels, feeding bowls & dishes, feeders, water bottles & water bottle holders
- C Housing, cages, hutches, pens, nests and nest boxes
- C Leashes and harness

4. Exotic animals including - camelids (llama, alpaca, etc.), goats, miniature horses

- C Headcollars made from leather, plastic, rope, textile material
- C Lead reins
- C Backpacks and panniers

5. Grooming aids for dogs, cats and other small animals

- C Bathing appliances and bath tubs
- C Brushes, combs & flea combs
- C Clippers & trimmers hand-operated and electrical
- C Grooming tables, gloves and posts
- C Dryers and dryer stands
- C Muzzles
- C Nail cutters, files and scissors
- C Show crates, show tables, control posts

6. Cage birds, ornamental poultry and wild birds

- C Aviaries and aviary netting
- C Bird charcoal
- C Breeding accessories
- C Cages including breeding & show cages
- C Cage fittings including perches, ladders, mirrors, bird baths, bird showers, other cage furniture and cage toys and exercise equipment made from natural offshoots of trees & plants, wood, plastic, rawhide, rope, rubber, cotton and other textile material. Also musical toys
- C Cage covers
- C Feeders and drinking containers including feed hoppers, feeding trays, cup and waterbottle holders, cuttlebone holders
- C Grooming tools - nail clippers and files, bill cutters, preening scissors
- C Heaters and incubators
- C Nesting boxes made of hair, wood, twigs, basket work, hemp, rattan, straw, wire, plastic etc.
- C Nest material & litter including loose sand and gravel for cages and aviaries, sanded sheets and gravel paper
- C Stands for cages and for parrot-like birds
- C Travel carrier cages
- C Wild bird products including feeders, fountains and baths

7. Reptilia & Amphibia

- C Cork sheets
- C Food dishes
- C Gravel and stone
- C Handling equipment - carrying cases, gloves, handling stick, leashes, collars, harness, probes, tongs and hooks
- C Housing including cages
- C Heaters, heat pads, heat rocks, incubators
- C Lighting fixtures - fluorescent, full spectrum and incandescent
- C Paludaria
- C Plants for tanks, terraria & vivaria
- C Tanks, terraria & vivaria
- C Terrarium decor - backgrounds, branches of trees & plants e.g. manzanita, caves, hide boxes, bog oak pieces, decorative sculptures made from wood and roots
- C Terraria stands and cabinets
- C Terrarium - lids & hoods, bedding
- C Toys for tanks, terraria & vivaria
- C Travel carrier cages
- C Turtle bowls

8. Ornamental fishkeeping

- C Aquaria, fish tanks and goldfish bowls, aquarium hoods & covers, aquarium illumination
- C Aquaria stands, frames and cabinets of wood or metal
- C Aquatic and water plants including planting tubs, containers and other accessories
- C Aquarium ornaments and display items including coral, shells, hardwood, plain and coloured sand, rocks, slate, marbles, plain and coloured gravel, lava stone, toys including aerated/ air releaser ornaments, other underwater furnishings and decorations including imitation castles, ancient ruins, wrecks, towers, ships, rocks, corals, reefs made of ceramic, plastic, glass and other material, artificial plants and flowers
- C Automatic fish food dispensers and feeding rings
- C Breeding and spawning mats and traps
- C Cleaning equipment for aquaria, tanks and bowls, including brushes and sponges
- C Compressors, air pumps and water pumps
- C Condensation trays
- C Decorative backings for aquaria and tanks
- C Dip nets
- C Filters and filtering materials (carbon, charcoal, diatomaceous earth) and accessories including water circulators
- C Ponds & pools including pool liners made of plastic material or fibreglass, water courses, other accessories including cover netting
- C Pond & pool ornamental fountains, fountain kits, jets and waterfalls, lighting equipment
- C Sea salt
- C Sealer guns and sealant
- C Thermometers, thermostats & heaters
- C Water testing kits and equipment

9. Miscellaneous items, general accessories and gifts for pet owners

- C Books, magazines
- C Burial markers, caskets and urns
- C Collectibles including animal paintings, sculptures and other handicraft made from wood, metal, glass, textiles, ceramic, etc.
- C Other articles with pet-related images - buttons; jewellery; door mats; figurines; key chains, tags & rings; leather wallets; magnets; paperweights; purses; stationery; decals, stickers and transfers; taxidermy including pet reproductions & stuffed animals; T-shirts and other clothing; umbrellas; greeting cards; trophies; wall plaques.
- C Videos and films for pet care & training, providing information for pet keepers. Special videos and films for the entertainment of pets. CD-ROMs providing music for the entertainment of pets.

Annex 2

The current and projected market value for pet accessories in 17 European countries in 1996 and 2001

US Dollars (millions)

Country	1996	2001
	\$ m	\$ m
Belgium & Luxembourg	132	141
Denmark	47	50
France	565	594
Germany	732	769
Italy	245	262
Ireland	18	19
Netherlands	239	248
Portugal	33	35
Spain	147	154
United Kingdom	538	565
Greece	19	22
Austria	94	99
Switzerland	69	72
Finland	26	27
Sweden	55	59
Norway	20	21
Total	2,978	3,136

- Note:*
- (a) All figures rounded up
 - (b) Due to considerable fluctuation in the exchange rate value of the US Dollar, figures are subject to a plus/minus factor of 5%
 - (c) Figures for some countries may include pet health & care products

Source: Marsh Business Services estimates

Annex 3

Number of pets by kind in 17 European countries in 1996

US Dollars (millions)

Country	Dogs	Cats	Cage Birds	Other Small Animals	Sub-total without fish	Fish (a)	Total
Belg-Luxembourg	1.70	1.80	3.00	1.20	7.70	4.70	12.40
Denmark	0.70	0.50	0.50	0.30	2.00	1.90	3.90
France	7.60	8.10	5.70	7.00	28.40	21.40	49.80
Germany	5.00	6.00	9.00	3.60	23.60	70.00	93.60
Italy	6.00	7.00	12.00	1.30	26.30	22.00	48.30
Ireland	0.52	0.36	0.20	(b)	1.08	0.20	1.28
Netherlands	1.40	2.10	6.00	1.05	10.55	22.00	32.55
Portugal	1.44	0.83	1.50	0.25	4.02	0.50	4.52
Spain	3.30	2.50	5.00	0.70	11.50	8.00	19.50
United Kingdom	6.55	7.23	1.42	4.50	19.70	29.50	49.20
Greece	0.40	0.40	(b)	(b)	0.80	(b)	0.80
Austria	0.52	1.20	0.37	0.32	2.41	0.70	3.11
Switzerland	0.42	1.20	0.48	0.28	2.38	3.75	6.13
Finland	0.45	0.45	0.04	0.10	1.04	(b)	1.04
Sweden	0.75	1.00	0.30	0.50	2.55	5.20	7.75
Norway	0.30	0.45	0.15	0.13	1.03	3.6	4.63
Total	37.05	41.12	45.66	21.23	145.06	193.45	338.51

Note: (a) All figures rounded up

(b) Includes pond fish. Based on an estimate of 15 fish per aquarium/tank owner

(c) Information not available

Source: Marsh Business Services estimates