

# **Market Development**

**MARKET BRIEF**

**ON**

**ACCESSORIES FOR PETS  
AND COMPANION ANIMALS**

**UNITED STATES OF AMERICA**

**ITC**



**INTERNATIONAL TRADE CENTRE UNCTAD/WTO**

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INTERNATIONAL TRADE CENTRE UNCTAD/WTO  
GENEVA  
1996

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

**M.DPMD/97/276**

## **Accessories for pets and companion animals United States of America**

### **General**

The pet trade and industry comprises a number of inter-related 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**

When all the many variations in design, shape, materials and colour are taken into consideration there are 10,000 to 12,000 items under the general heading of 'pet accessories'. At 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 covers 4,100 species such as - toads & frogs, also include an insect sub-sector - ants, beetles, and arachnids such as scorpions and spiders. The heading of reptiles includes some 6,600 species e.g. snakes, lizards, iguanas, turtles/tortoises
- 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).**

*Note:* Exotics - In the USA, the pet trade has a distinct pet category called exotics which is used for companion animals or pets such as - 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.

It is virtually impossible to separate the pet accessories used for animals which are not kept as pets. These include pigeons and greyhounds which are kept for racing, as both pigeon racing and greyhound racing are considered to be sports. Accessories used with 'service or working animals' such as guide dogs for the blind; farm dogs, sheep dogs and hunting dogs; guard dogs and dogs used by the military, police and for drug enforcement. Accessories for rabbits which are bred and reared for food, skin and fur, also fall under this category.

Similarly while this market brief only covers pet accessories there are some products, for example combs used for flea-fighting, which may be classified under as health & care products or alternatively as accessories.

## Market Characteristics

The North American market for pet supplies and accessories represents approximately one-third by value of the total world market. The other important and unique factor is, that the whole market shares a common language.

In 1994 the human population of the United States was 255 million and the number of households 98.4 million. 58 million households or around 59%, keep at least one pet. The total number of pets excluding ornamental fish was 248.1 million and 149.1 million if fish are included. (See Annex 2 for pet numbers and Annex 3 for details of pet owning households).

In 1996 the retail value of the US market for pet accessories was US\$3,668 million. (See Annexes 4 and 5 for details of sales of selected pet accessories in specialised and non-specialised retail outlets).

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 manufactured in the USA, considerable quantities are imported from Asia and South East Asia including - Bangladesh, China and (Taiwan, Province of China), Hong Kong, Indonesia, Japan, Philippines, Singapore, Sri Lanka and Thailand. Pet accessories are also imported from countries in Central and South/Latin America. Imports from developing countries in Africa, Oceania and Eastern Europe are still very limited. Almost all these countries have suitable raw material and could supply pet accessories, but neither entrepreneurs nor government export trade promotion agencies have taken effective steps to create awareness of export opportunities for pet accessories.

More than 2,000 companies supply the US market with pet accessories. The great majority of these are only active in one or two product categories e.g. dog accessories, fish accessories, bird accessories, etc. Only a limited degree of consumer brand consciousness exists. 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 pet food companies. There are in the region of 16 major suppliers of pet accessories, a major supplier being defined as possessing 1% or more of national sales. These include - Hartz Mountain, Ralston Purina and First Brands.

The own-label, i.e. private-label or own-brand market for pet accessories is substantial. For example, in mass merchandisers (hypermarkets) almost 25% of sales of cat litter are private label products, in supermarkets 11% and in drug stores 5.7%. 'Private label' is a name that indicates an individual store or distribution company. Private labelling occurs at various levels; a manufacturer can package an existing product with a client's label; or he can develop and /or produce a new product for a client; or he can assist a retailer to develop an appropriate look, name and logo.

Almost half of all dog owners buy toys for their dogs and most dog owners purchase toys between two and three times a year. 56% of dogs have decorative collars, of these 16% are bought once a year, 27% once every 1 to 2 years and 56% less than once every two years. 92% of dogs have a leash (the greater proportion of which are made from nylon).

99% of cat owners buy cat litter. Cat litter is probably the largest single accessory product group and annual sales are in the region of \$100 million. 91% of owners have food dishes and 47% buy toys for their cats, while 30% of owners own a scratching post.

The average amount spent in the USA per fish is \$35 per year. This figure includes not only accessories but also health & care items and food. 18% of those who keep freshwater fish buy live aquarium plants and more than 300 different species of aquarium plants are available.

Almost all pet owners buy gifts for their pets on appropriate occasions such as birthdays (!), religious holidays such as Christmas and Easter, or on impulse. 54% of owners buy gifts for their cage birds. 97% of all bird owners have cage accessories and 79% toys for their birds. Even some of those who own fish and reptiles buy presents for their pets.

41% of owners of small animals own exercise wheels, 36% wood chews / chew sticks, and 17% leads/leashes or harnesses for their pets.

58% of reptile owners have cage furniture, and 49% other accessories. 23% of turtle owners own plastic habitats.

## **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. However, in view of the large number of different products it is not possible to indicate market prices.

The wholesale margins on pet accessories are in the range of 10% and 25%. The average gross margins for accessories realised by the retail trade are 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**

The creation, in 1994, of NAFTA - North American Free Trade Agreement, gave additional urgency to harmonising standards and encouraging closer working relationships between the various organisations in the United States, Canada and Mexico. This is expected to take time because the American National Standards Institute (ANSI) has, unlike equivalent organisations in Europe, no direct role in setting standards. ANSI sets standards to which standard-setters are expected to conform. There are over 400 standards writing bodies in the USA.

Because the majority of pet accessories cannot be identified under either SITC-based (Standard International Trade Classification) or HS (Harmonised System) product code headings, reference to customs tariffs and duties are outside the scope of this market brief.

## **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. Products for sale in grocery and/or pet supermarkets may have to be bar-coded.

The Packaging and Labelling Act provides that packages distributed in United States commerce must satisfy regulations of the Federal Trade Commission (FTC). American tort liability standards provide that manufacturers must exercise reasonable care to warn buyers and expected users of a product of its actual or potential dangerous character. This means labels and instructions must convey the dangerous consequences of use and misuse of a product to a 'reasonably intelligent expected user'.

The Federal Trade Commission with the support of the Environmental Protection Agency and the US Office of Consumer Affairs has issued guidelines to help reduce consumer confusion and prevent the false or misleading use of environmental terms such as 'recyclable', 'degradable' and 'environmentally friendly' in product labelling.

## **Trade Channels**

Intermediaries include agents, importers and wholesalers.

## **Specialised retail outlets**

Both pet shops which sell and which do not sell animals, aquarium shops, grooming shops, feed stores, boarding kennels & catteries, veterinarians, pet superstores, agricultural stores; garden, hardware and feed stores; stores specialising in horse supplies; and well over 150 retail mail order businesses. Superstores (over 8,000 sq. ft. or 743m<sup>2</sup>) and pet chain stores with considerable purchasing power include - PetsMart Inc. with 247 stores, Petco Animal Supplies with 305 stores, and Petland Discounts with 106 stores. There are also a growing number of pet retail franchise operations which include Petland, Pet Supplies "Plus" with 105 stores, Pet Valu, and Petland Inc. with 148 stores. There are 18,000 speciality retailers in the USA. Pet superstores and chain stores have considerable purchasing power.

A pet superstore may carry between 7,000 and 10,000 SKUs (Stock Keeping Units) while a typical pet shop may stock 3,500 SKUs.

## **Non-specialised outlets, particularly the grocery channel**

There are 30,000 supermarkets, 500 club warehouse stores, 58,000 convenience stores, as well as 49,000 speciality stores, department stores and discount stores, drug and mass merchandise (hypermarket) units. Almost all offer varying assortments of pet food and pet accessories. Hardly any of these outlets provide national coverage. Only 18,000 supermarkets are organised in chains; the largest of these has 2,000 stores covering no more than one-third of the country. The purchasing power of mass merchandisers is considerable.

Sales through specialised retail outlets account for around 42% of the pet accessories market while non-specialised outlets including the grocery channel have 58% market share.

### Sales promotion

Standard promotional methods are used. Trade fairs and the national 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 United States is forecast to grow by 8.5% to US\$ 3,980 million in constant 1996 dollar value. This forecast is supported by factors which include - an expanding population of both humans and pets and that pets are receiving better care.

*Note:*                    p        a        r        t                                    o        f                    t        h        i        s  
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                               dogs and cats in Brazil and that annual sale of pet products including pet food, health  
                               & care products and accessories are in the region of \$280 million. Trade forecasts  
                               suggest an above average growth of these markets. The first South American pet trade  
                               fair was held in Sao Paulo in Brazil in 1996. In 1997 a second trade fair will be staged  
                               in Sao Paulo in Brazil and a new event in Buenos Aires in the Argentine.

Markets in  
 Central and  
 South or  
 Latin  
 America do  
 not form

### Sources of Information

- C                    Contact with manufacturers, traders, experts, trade associations, trade fair catalogues and visits to trade fairs
- C                    Published US market research reports and Marsh Business Services



## Useful Addresses

### Trade Fairs

APPMA National Pet Products  
Trade Show  
255 Glenville Road,  
Greenwich, CT 06831, USA  
Tel: (1) 203 532 0000  
Fax: (1) 203 532 0551

America's Family Pet Expo  
American Pet Society  
406 S. First Avenue,  
Arcadia, CA 91006-3829, USA  
Tel: (1) 818 447 2222  
Fax: (1) 818 417 8350

WWPSA Trade Show  
406 S. First Avenue,  
Arcadia, CA 91006-3829, USA  
Tel: (1) 818 447 2222  
Fax: (1) 818 417 8350

Annual Pet Industry Spring Trade Show  
H.H. Backer Associates Inc.,  
20 E. Jackson Blvd. Suite 200  
Chicago, Illinois 60604, USA  
Tel: (1) 312 663 4040  
Fax: (1) 312 663 5676

Annual Pet Industry Christmas Show  
H.H. Backer Associates Inc.,  
20 E. Jackson Blvd. Suite 200  
Chicago, Illinois 60604, USA  
Tel: (1) 312 663 4040  
Fax: (1) 312 663 5676

Intergroom  
250 East 73rd Street, Suite 4-F,  
New York, NY 10021, USA  
Tel: (1) 212 628 3537  
Fax: (1) 212 472 6578

Petfood Forum  
Watt Publishing Co.,  
122 S. Wesley Ave.,  
Mount Morris, IL 61054-1497, USA  
Tel: (1) 815 734 4171  
Fax: (1) 815 734 4201

PIDA Pet Exposition & Trade Show  
PIDA, 5024-R Campbell Blvd.,  
Baltimore, MD 21236, USA  
Tel: (1) 410 931 8100  
Fax: (1) 410 931 8111

PIJAC Canada Pet Industry Trade Show  
PIJAC Canada, Box 126, R.R. #1, Haliburton,  
Ontario K0M 1S0, Canada  
Tel: (1) 705 754 2904  
Fax: (1) 705 754 2905

Information about Trade fairs in Brazil and  
the Argentine:  
Royal Dutch Jaarbeurs  
P O Box 8500,  
3503 RM Utrecht, Netherlands  
Tel: (1) 31 30 295 5513  
Fax: (1) 31 30 295 5709

### Trade Journals

International Pet Industry News  
P.O. Box 10069  
Austin, TX 78766, USA  
Tel: (1) 512 454 3420  
Fax: (1) 512 454 3420

Pet Age Magazine  
H.H. Backer Associates Inc.,  
20 E. Jackson Blvd. Suite 200  
Chicago, Illinois 60604, USA  
Tel: (1) 312 663 4040  
Fax: (1) 312 663 5676

Pet Business  
7 - L Dundas Circle,  
Greensboro, NC 27407, USA  
Tel: (1) 910 292 4047  
Fax: (1) 910 292 4242

Petfood Industry  
Watt Publishing Co.,  
122 S. Wesley Ave.,  
Mount Morris, IL 61054-1497, USA  
Tel: (1) 815 734 4171  
Fax: (1) 815 734 4201

Pet Dealer  
Howmark Publishing Co.,  
567 Morris Avenue,  
Elizabeth, NJ 07208, USA  
Tel: (1) 908 353 7373  
Fax: (1) 908 353 5652

Pet Product News  
P.O. Box 6050,  
Mission Viejo, CA 92690, USA  
Tel: (1) 714 855 8822  
Fax: (1) 714 855 3045

Pet News  
World Wide Pet Supply Association (WWPSA)  
406 South First Avenue,  
Arcadia, CA 91006-3829, USA  
Tel: (1) 818 447 2222  
Fax: (1) 818 417 8350

Caes & Gatos  
Gessulli Editores Ltda.,  
Pca. Sergipe 154,  
Porto Felix - SP, Brazil  
Tel: (55) 152 62 3133  
Fax: (55) 152 62 3919

## **Trade Directories**

Pet Age Source Book  
H.H. Backer Associates Inc.,  
20 E. Jackson Blvd. Suite 200  
Chicago, Illinois 60604, USA  
Tel: (1) 312 663 4040  
Fax: (1) 312 663 5676

Pets Supplies Marketing  
Fancy Publications Inc.  
2401 Beverly Blvd.,  
Los Angeles CA 90057-0900, USA  
Tel: (1) 213 385 2222  
Fax: (1) 213 385 8565

## **Trade Associations**

### **USA**

Pet Industry Distributors Association (PIDA)  
5024-R, Campbell Blvd.,  
Baltimore, MD 21236, USA  
Tel: (1) 410 931 8100  
Fax: (1) 410 931 8111

American Grooming Shop Association  
(AGSA)  
4575 Galley Road, Suit 400-A,  
Colorado Springs, CO 80915, USA  
Tel: (1) 719 590 7788  
Fax: (1) 719 597 0006

American Pet Products Manufacturers  
Association (APPMA)  
255 Glenville Road,  
Greenwich, CT 06831, USA  
Tel: (1) 203 532 0000  
Fax: (1) 203 532 0551

Pet Industry Joint Advisory Council (PIJAC)  
1220 19th Street, NW, Suite 400,  
Washington, DC 20036, USA  
Tel: (1) 202 452 1525  
Fax: (1) 202 293 4377

World Wide Pet Supply Association (WWPSA)  
406 South First Avenue,  
Arcadia, CA 91006-3829, USA  
Tel: (1) 818 447 2222  
Fax: (1) 818 417 8350

## **Canada**

Pet Industry Joint Advisory Council (PIJAC)  
189 Hymus Blvd., Suite 308,  
Pte-Claire, Quebec H9R 1E9, Canada  
Tel: (1) 514 630 7878  
Fax: (1) 514 630 7444

Pet Food Association of Canada  
1435 Goldthorpe Road,  
Mississauga, Ontario, Canada  
Tel: (1) 905 891 2921  
Fax: (1) 905 278 4778

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

**USA**

**(Importers and wholesalers)**

Abba Products Corp.  
1004 Elizabeth Ave.,  
Elizabeth, NJ 07201, USA  
Tel: (1) 908 353 0669  
Fax: (1) 908 353 2065

Europet  
1024 Kinzie Street,  
Chicago, Ill. 60622, USA  
Tel: (1) 312 738 0795  
Fax: (1) 312 738 0797

Fritz Pet Products  
Retail Division,  
Mesquite, TX. 75149, USA  
Tel: (1) 214 285 5471  
Fax: (1) 214 289 8756

Great China International Inc.  
1750 California Avenue, Ste 113,  
Corona, CA. 91719, USA  
Tel: (1) 909 272 9750  
Fax: (1) 909 272 9321

Great Western Trading Co Inc.  
2512 Summit Ave., Ste 304,  
Plano, TX 75074, USA  
Tel: (1) 214 424 4404  
Fax: (1) 214 424 3520

Hagen (USA) Corp.  
50 Hampden Rd,  
Mansfield, MA. 02048-9107, USA  
Tel: (1) 508 339 9531  
Fax: (1) 508 339 6973

Hermco Worldwide Trading  
(Div. of Herman Brothers Sales Corp.)  
3021 Central Avenue,  
Detroit, MI 48209, USA  
Tel: (1) 313 843 4560  
Fax: (1) 313 845 0170

Jungle Talk International Inc.  
7070, 117 Avenue, Bldg B,  
Broomfield, CO 80020, USA  
Tel: (1) 303 460 7070  
Fax: (1) 303 465 1717

King Wholesale  
1313 Sanborn Road,  
Yuba City, CA 95993, USA  
Tel: (1) 916 674 9302  
Fax: (1) 916 674 9341

Multipet International Inc.  
626 16th Street,  
Carlstadt, NJ 07072, USA  
Tel: (1) 201 438 6600  
Fax: (1) 201 438 2990

Partrade Trading Corp.  
3888 E, 45 Ave. Ste 310,  
Denver, Co. 80216, USA  
Tel: (1) 303 399 4623  
Fax: (1) 303 320 0556

Peak Pet Products  
400 Quaint Acres Dr.,  
Silver Springs, MD 20904, USA  
Tel: (1) 301 791 0094  
Fax: (1) 301 340 3343

Pet Goods Manufacturing & Imports  
3160 B Enterprise Street,  
Brea, Ca. 92621, USA  
Tel: (1) 404 475 7325  
Fax: (1) 404 475 5636

Pet Supply Imports Inc.  
P O box 497,  
South Holland, Il. 60473, USA  
Tel: (1) 708 596 1705  
Fax: (1) 708 596 3012

Petcetra Etc Inc.  
(Div. of Abbey Enterprises)  
235 W First St.,  
Bayonne, NJ 07002, USA  
Tel: (1) 201 823 3690  
Fax: (1) 201 823 0919

Preview Metal Products Inc.  
(Div. of Reliance Pet Products Inc.)  
224 N. Maplewood Ave.,  
Chicago, Ill. 60612, USA  
Tel: (1) 312 243 3624  
Fax: (1) 312 243 4224

Rotanis Pet Products Inc.  
73 Spring St.,  
Ossining, NY 10562, USA  
Tel: (1) 914 941 7440  
Fax: (1) 914 941 1885

Speiser Pet Supplies  
7040 SW 21st Place,  
Davie, FL 33317, USA  
Tel: (1) 305 472 1404  
Fax: (1) 305 472 3189

Tideline  
640 S Isis Ave.,  
Inglewood, CA 90301, USA  
Tel: (1) 310 641 9106  
Fax: (1) 310 649 1131

Vo-Toys Inc.  
400 S, 5th Street,  
Harrison, NJ 07029, USA  
Tel: (1) 201 484 0088  
Fax: (1) 201 849 9569

Warren Pet Products  
507 NE, 189 Street,  
North Miami Beach, Fl 33179, USA  
Tel: (1) 305 652 4777  
Fax: (1) 305 652 2737

## **American Superstores**

PetsMart Inc.  
10000 N. 31st Avenue,  
~C-100, Phoenix, AZ 85051, USA  
Tel: (1) 602 944 7070  
Fax: (1) 602 395 6508

Pet Supplies "Plus"  
6030 Pennsylvania Avenue,  
Lansing, MI 48911, USA  
Tel: (1) 517 321 7950  
Fax: (1) 517 327 7884

Petco Animal Supplies  
9125 Rehco Road,  
San Diego, CA 92121, USA  
Tel: (1) 619 677 3052  
Fax: (1) 619 453 6585

Petland Discounts  
355 Crooked Hill Road,  
Brentwood, NY 11717, USA  
Tel: (1) 516 273 6363  
Fax: (1) 516 273 6513

Petland Inc.  
195 N. Hickory St.,  
Chillicothe, OH 45601, USA  
Tel: (1) 614 775 2464  
Fax: (1) 614 775 2575

## **Canada**

Rolf C.Hagen Inc.  
3225 Sarleton Street,  
Montreal, Quebec H4R 1E8, Canada  
Tel: (1) 514 332 0914  
Fax: (1) 514 335 0165

BRT Pet Foods Inc.  
RR7 Peterborough,  
ON, K9J 6X8, Canada  
Tel: (1) 705 295 6832  
Fax: (1) 705 295 6806

Burgham Sales Ltd.  
470 Finchdene Square,  
Scarborough, ON, M1X 1C2, Canada  
Tel: (1) 416 293 8080  
Fax: (1) 416 293 4225

Cameron Management Ltd.  
1847-48 St. SE,  
Calgary, Alberta, T2B 1L9, Canada  
Tel: (1) 403 248 0884  
Fax: (1) 403 248 0889

Pet Valu Canada Inc.  
121 McPhearson St.,  
Markham, ON, L3R 3LE, Canada  
Tel: (1) 905 946 1200  
Fax: (1) 905 475 7576

## Annex 1

### Pet accessory products

#### 1. Dogs

- C Beds, baskets and bedding including mats, mattresses, rugs 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 and attire 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 Dog toilets
- C Drinking bowls, feeding bowls and dishes, place mats and automatic feeders
- C Electronic training aids - fencing, training & correction collars, furniture protecting cushions
- C Exercise pens & runs, gates and other pet management aids
- C Harness
- C Hygiene accessories - toothbrushes, dental cleaners
- C Housing - cages, crates, kennels, portable pet enclosures, 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 Scoops and bags for dog faeces / waste
- 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 bicycle trailers. Airline dog carriers
- C Training and dog handling equipment include: 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
- C Water Accessories - lifejackets, floating toys

#### 2. Cats

- C Beds, 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 Collar bells
- 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 Identification - tags & tubes
- C Litter pans made of metal, paperboard or plastic; pan liners, trays, scoops and spoons
- C Pet flaps or doors
- C Toys - interactive e.g. spinners, feather, motorised, catnip items
- 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, deodorant-scented litter
- C Cage heaters, cage ornaments, cage 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 harnesses
- C Motorised toys for ferrets

### **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, netting, frames and panels
- C Avian speech instruction disks (CD)
- C Bird charcoal
- C Breeding accessories
- C Cages including breeding & show cages
- C Cage fittings including perches, ladders, hoops, rings, swings, mirrors, bird baths, bird showers, other cage furniture and cage toys and exercise equipment made from natural offshoots of trees & plants, wood, plastic, acrylic, rawhide, leather, rope, rubber, cotton & other textile material, also of multiple 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 Musical toys
- 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, liners for cage bottoms
- C Stands for cages
- C Stands for parrot-like birds
- C Travel carrier cages
- C Wild bird products including feeders, fountains and baths

## 7. Reptilia & Amphibia

- C Ant keeping accessories - tanks, stairs, tubes, water feeder, tunnelling sand, tank stands
- C Cork sheets
- C Food dishes
- 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, basking light, incubators
- C Lighting fixtures - fluorescent, full spectrum and incandescent
- C Paludaria
- C Plants for tanks, terraria & vivaria
- C Reptile bedding
- 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 Terrarium substrate - gravel, stone
- C Terrarium stands and cabinets
- C Terrarium - lids & hoods
- 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, display items and aquarium substrate including coral, shells, hardwood, plain and coloured sand, rocks, slate, marbles, plain and coloured gravel, lava stone, toys including aerated/air releaser ornaments and battery-powered 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 and synthetic 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 Pond & pool 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, prints, lithographs, 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; decals, stickers and transfers; taxidermy including pet reproductions & stuffed animals; T-shirts and other items of clothing; umbrellas; pet and animal-themed note cards, greeting cards and stationery; trophies; wall plaques, posters
- C Videos and films for pet care & training and providing information for pet keepers. Special videos and films for the entertainment of pets. CD-ROM providing music for pet entertainment

## Annex 2

### Number of pets by kind in the USA in 1996 in million

Pets	(m)
Dogs	54.2
Cats	59.4
Cage Birds	16.0
Other Small Animals	12.2
Reptiles	7.3
Sub-total (excluding fish)	149.1
Ornamental fish	99
Total	248.1

*Note:* All figures rounded

*Source:* Trade estimates & Marsh Business Services

### Annex 3

#### Percentage of Pet-owning Households in the USA in 1994 and 1996

	1996	1994
	%	%
<b>Owning at least one Pet</b>	59	56
Dog	37	36
Cat	32	30
Freshwater Fish	11	10
Cage Bird	6	6
Other small animals	5	5
Reptile	3	3
Saltwater Fish	0.6	0.6

Source: Trade estimates & Marsh Business Services

## Annex 4

### Sales of selected Pet Accessories through pet shops (a) in 1995 in US\$ million

Product Segment	Segment	Total
	\$m	\$m
<b>Dogs - of which</b>		265
Collars & Leads	64	
Clothing & Accessories	32	
Chews & Raw Hide	40	
Bowls & Dishes	33	
Toys	37	
Beds, Enclosures, Carriers	41	
Others	18	
<b>Cats - of which</b>		173
Litter	37	
Furniture & Scratchers	38	
Toys	37	
Collars & Leads	23	
Beds, etc.	25	
Others	13	
<b>Small Animals - of which</b>		63
Chews, Treats, Toys	25	
Cages, Enclosures	33	
Others	5	
<b>Cage Birds - of which</b>		211
Toys, Perches	87	
Cages	106	
Others	18	
<b>Ornamental Fish - of which</b>		443
Filters, Heaters	124	
Aquarium kits	161	
Others	158	
<b>Amphibians &amp; Reptiles - of which</b>		73
Terrarium	23	
Heaters	12	
Terrarium Accessories	15	
Lighting	11	
Background	8	
Others	4	
<b>Exotics</b>		2
<b>Grand Total</b>		1,230

*Source:* Trade estimates & Marsh Business Services

## Annex 5

### Sales of selected Pet Accessories through non-specialised outlets (a) in 1994 in US\$ million

<b>Products</b>	<b>\$m</b>
Cat Litter	588
Raw Hide Products	218
Other Pet Accessories	1,083
<b>Total</b>	<b>1,889</b>

*Notes:* All figures rounded

(a) Grocery outlets, mass merchandisers, drug stores

*Source:* Trade estimates & Marsh Business Services