

MARKET BRIEF

ON

**Accessories for Pets
and Companion Animals**

An Overview of the market in Central and Eastern Europe

ITC



INTERNATIONAL TRADE CENTRE UNCTAD/WTO

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PET ACCESSORIES OVERVIEW OF THE MARKET IN CENTRAL AND EASTERN EUROPE

General

This market brief focuses on Russia, Poland, the three Baltic Republics of Estonia, Latvia and Lithuania, the Czech Republic, and the Slovak Republic. It also makes brief reference to pet trade activities in Hungary and the Ukraine. The pet trade and industry comprises a number of inter-related sectors - livestock, pet food including live food for pets, pet health and care products, pet accessories and pet-related services. This market brief focuses only on pet accessories.

Product description

When the many variations in design, shape, materials and colour are taken into consideration there are 10,000 to 12,000 items or SKU's (stock keeping units) under the general heading of 'pet accessories', although currently in Russia the number of SKU's available is probably around one-quarter of this. At retail level these accessories are usually classified under end-user headings:

- accessories for dogs
- accessories for cats
- grooming aids for dogs and for cats
- accessories for 'other small animals' which, in Western Europe, includes 'cavies' i.e. guinea pigs, hamsters, chinchillas, mice, rabbits and dwarf rabbits, ferrets and hermit crabs
- accessories for amphibians which covers 4,100 species such as toads and 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 Western Europe, they are usually included under the heading of 'other small animals'
- accessories for cage birds, ornamental poultry e.g. waterfowl, pheasants, etc. and wild birds
- accessories for ornamental fish or 'wet pets', which includes both freshwater and saltwater or marine fish
- 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).

Market characteristics

In 1997 the total value of the Russian market for all pet products, including pet food, pet accessories and pet health and care products was estimated to be between US\$500 million and US\$600 million. The retail value of the pet accessories market is around US\$125 million. (See - Assumptions and qualifications and Annex 2).

The number of inhabitants is 147 million and there are around 51 million households. The figure in regard to the number of households should be treated with a degree of caution since in many regions of Russia there may be several different families living in one household or apartment. There are a wide range of different opinions about the number of pets kept in Russia (see Assumptions and qualifications).

Dogs

Some sources state that there are 36 million. This is probably a considerable exaggeration and the number is more likely to be in the region of 20 million. There is general agreement that most of the dogs kept in Russia are large breeds.

Cats

Some sources claim that there are 47 million. This too is unlikely and it is estimated that the figure is more likely to be between 35 and 40 million.

Cage birds

Trade estimates suggest that around 7% of all households keep cage birds and ornamental poultry. The latter are often likely to be considered as 'domestic animals' rather than pets. Some trade sources suggest that the number of cage birds is in the region of 15 million. Trade sources are unable to estimate the number of ornamental poultry.

Other small animals, including rodents and reptiles

There are many 'other small animals' kept as pets. Although trade sources are unable to estimate numbers under this heading, pets under this heading could well number around 10 million. Veterinarians and animal clinics state that they treat 'other small animals' including exotic pets. They suggest that there are at least 100 different types of exotic pets brought to them for treatment including snakes, lizards, iguanas, turtles/tortoises, mice and monkeys.

Ornamental fish

It is estimated that more than 10% of all households keep ornamental fish which includes both freshwater and saltwater or marine fish. The number of persons who keep them is probably between 6 million and 10 million. Fish-keeping reached its peak during the late 1970s and early 1980s. Currently available in Russia there are well over 500 species of fish and 250 species and variants of aquarium plants.

Regional differences in pet ownership

There are considerable differences in pet owning between households in urban and rural areas. United Nations data suggests that 73.5% of households are in urban areas and 26.5% in rural areas. Due to lack of refinement of statistical techniques, *other domestic animals* e.g. poultry and ornamental poultry, pigs, etc. are often included under the heading of pets when describing pet ownership in rural areas.

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 enormous number of different products it is not possible to indicate market prices.

The wholesale margin on pet accessories is 100% if the exporter does not grant credit terms. If he buys on credit then it is in the range of 30% to 40%. Gross margins for accessories realised by retail pet shops range between 30% and 100%.

Market access

Russia imposes few non-tariff restrictions. The real and practical barriers are administrative practices, poor infrastructure and an inefficient banking system.

Russia uses the Harmonized Commodity Description and Coding System (HS). However, as the majority of pet accessories cannot be identified under either SITC-based (Standard International Trade Classification) nor under the HS (Harmonized System) product codes headings, reference to customs tariffs and duties is outside the scope of this market brief.

Import regulations are often introduced without warning and enacted retrospectively. Import tax on pet accessories ranges between 15% and 25%, according to product type. Value added sales tax is around 20%.

The 'grey market'. One should be aware that a considerable quantity of pet accessories is imported by *chelnoki* or shuttle traders. These itinerant merchants bring large quantities of duty-free goods from around the world and sell them rent-free in open-air markets.

Trademarks. The protection of intellectual property rights afforded by registration of a trademark in many western countries, does not yet extend to Russia.

Packaging and labelling

The type of packaging used should take into consideration protection of goods from physical damage.

While many locally (Central and Eastern European) made pet accessories are sold in very basic packaging, an increasing number of imported pet accessories are already available in attractive, eye-catching, presentation packs. It is only a matter of time before locally produced goods will rival imports in presentation.

The law on the Protection of Consumer Rights of 7 February 1992, and associated legislation, prescribes when and how products offered for sale in Russia must be labelled.

Trade channels

Intermediaries include agents, importers and wholesalers. The main importers/distributors include: Agidis Ltd, Artemida, Euro-Zoo, Falcon, Goldfish (Moscow), Goldfish (St. Petersburg), Michel, Kovcheg, Krits, Raritet and Zooservice.

Regional consumption patterns depend very much on distribution. The main centres of population are - in western and south-western Russia - Moscow, St. Petersburg, Nizhny-Novgorod, Rostov-on-Don and Volgograd; in the North West - Murmansk; in the Urals region - Yekaterinburg; in East and West Siberia - Omsk, Novosibirsk, Krasnoyarsk; and in the Russian Far East - Yakutsk, Vladivostok, Khabarovsk and Yuzhno-Sakhalinsk.

Importers - there are in the region of 50 pet product importers of which 10 operate on a significant scale. The number of wholesaler distributors is around 25 of which 15 are quite substantial.

Retail distribution is both through specialized retail outlets and the food/grocery channel.

(1) Specialized retail outlets

These account for around 60% of all pet accessory sales. Outlets under this heading include:

- retail pet shops
- shops selling hunting and fishing/angling accessories
- pet grooming parlours
- animal hospitals, clinics, veterinary practices
- open-air and semi-enclosed markets with market stalls

In Moscow there are around 100 pet shops, and around 250 kiosks and pavilions selling pet products. In Ptichy Rynok or bird market over 500 vendors sell live fish and fish keeping accessories. In St. Petersburg there are probably around 200 pet shops, although many of these are very small units. There are around 150 kiosks and pavilions selling pet products. Some wholesalers state that the number of kiosks and pavilions selling pet products in St. Petersburg is 500. There are no means whereby these statements can be checked.

In Vladivostok there are 10 pet shops, and 20 kiosks and pavilions selling pet products.

The number of registered veterinarians in Russia is around 2,000, to which should be added a large number of non-registered veterinarians.

(2) Food and grocery channel

It is estimated that supermarkets have a 40% market share of all pet accessory sales. There are already a number of supermarkets and supermarket chains. Some are western-style. Russian style supermarkets carry a more limited number of product items.

Kiosks are a special feature of all Russian towns and cities and are characterised by long opening hours. Several kiosks are sometimes grouped together under one roof with walk-in facilities, to form larger pavilions. There are also many open-air and semi-enclosed markets with market stalls. In time the number of kiosks will be reduced and develop into normal retail outlets.

In Moscow between 500 and 700 food and grocery outlets sell pet products including pet food and accessories.

Sales promotion

Standard promotional methods are used. To reach importers, distributors and retailers, trade fairs are currently the most effective means. Television is used by pet food manufacturers and distributors to reach end-users. There is, as yet, no effective trade media. The best developed media are consumer magazines for pet owners.

The average Russian consumer still has little brand loyalty and end-users are inclined to judge the quality of goods by country of origin rather than brand names.

The number of trade fairs in Russia is increasing. The largest of these is Zoosphere in St. Petersburg. In 1997 it was visited by 13,000 persons, including members of the public. Other trade fairs are staged in Moscow and Nizhny Novgorod. Most of them also admit members of the general public. At some trade fairs pet judging competitions, circus-like events and pet training demonstrations coincide with the exhibition. There are other fairs and exhibitions which are primarily dog shows and cat shows. Details of trade fairs and titles of magazines for pet owners are provided under the section 'Addresses'.

Commercial practices

Import prices are generally quoted CIF or FOB. Initially most export/import transactions are on a cash with order basis. After a reasonable confidence level has been established between the parties concerned, business is usually conducted on a cash against document (CAD) basis.

The number of importers able to read and speak a second language, usually English or German is increasing. However many Russian importers do not read and speak a second language. It is therefore highly desirable, particularly when exporting to Russia, to prepare sales material in the Russian language. 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

As living standards increase in Eastern and Central European countries, so will the amount of money spent on pet accessories and services. These markets are forecast to show greater expansion than markets in Western Europe, although it is impossible to quantify this growth with any degree of precision.

During the five year period 1997 - 2002 the market for pet accessories in the Russian Federation is forecast to grow to US\$375 million at constant 1997 dollar value.

Assumptions and qualifications

According to remarks by World Bank personnel, economic statistics available from Russia do not reflect practices in 'Western' market economies. It has been estimated that between one-third and one-half of economic activity is hidden from statisticians. This comment needs to be borne in mind when interpreting the statistical data, in particular about Russia, in this market brief. (see Annex 2)

Sources of information

- Contact with manufacturers, traders, experts, trade associations, trade fair catalogues, visits to trade fairs
- Published pan-European market research reports, Pets International Magazine and Marsh Business Services
- "Consumer Marketing in Russia", The Economist Intelligence Unit, London
- Demographic Yearbook 1994, United Nations, Department for Economic and Social Information and Policy Analysis

Useful Addresses

Trade fairs

ZOOSPHERE (formerly
ZOOINDUSTRY)
held in September in St. Petersburg
Organizers: LENEXPO
Vasilievky Island, Bolshoy Prospect
199106 St. Petersburg, Russia
Tel: (7812) 5946900
Fax: (7812) 5308292

DOMZOO
held in February in Moscow
Organizers: Ost-West-Partner GmbH,
Ringstrasse 19
92637 Weiden, Germany
Tel: (49961) 389770
Fax: (49961) 32035

ZOOWORLD
held in October in Nizhny Novgorod
Organizers: Nizhegorodskaya Yarmarka
(*Tatiana Serupanova*)
13 Sovnarkomovskaya Str.
603086 Nizhny Novgorod, Russia
Tel: (78312) 345489
Fax: (78312) 345674
Email: yarmarka@yarmarka.ru

Consumer magazines and trade publications

AQUARIUMIST
Company "Zoomarket"
Vekovaya Str. 21, office 14
125015 Moscow, Russia
Tel / Fax: (7095) 2782389

KOT I PES Magazine
(Cat and Dog Magazine)
1-st Tverskaya-Yamskaya Str. 2, Build. 1,
103000 Moscow, Russia
Tel: (7095) 2516069 / 2519676
Fax: (7095) 2545309 / 1887758

MAGAZINE "FRIEND" also other
specialist magazines about dogs, cats and
birds
Droug Publishing House,
Zuborsky Avenue 17
119847 Moscow, Russia
Tel: (7095) 2462564 / 2640472
Fax: (7095) 2465636

PTICHY RYNOK Magazine
Novodmitrovskaya Str. 5a, office 1314,
125015 Moscow, Russia
Tel: (7095) 2857292
Fax: (7095) 2857392

ZHIVOY MIR
Zorge Str. 18, P.O. Box 8
125252 Moscow, Russia
Tel: (7095) 9438661 / 9435289
Fax: (7095) 9435289

Directory (published in Cyrillic)

ZOOINFORM
P O Box 041
Moscow 125581, Russia
Tel: (7095) 7557771
Fax: (7095) 7557772
Email: zooinf@orc.ru

Directory (published in English)

The International Buyers' Guide
InterMedium Publishers b.v.
P O Box 1176
3600 BD Maarssen, Netherlands
Tel: (31346) 555266
Fax: (31346) 550865

Trade associations

Pet Industry Association of Russia
Prosveshchenia Prospect 80 - 2
195295 St. Petersburg, Russia
Tel: (7812) 5308349
Fax: (7812) 5951690

Russian Association of Zoo-Technik,
Veterinarians and Zoo Industry
Bld. 1 - 2, Bolghoy
Kozlovsky Str., House 12
107058 Moscow, Russia
Tel / Fax: (7095) 9214879 /
(7095) 9307442

Major wholesalers and distributors

AGIDIS LTD
Krasuzkogo Str. 4
196184 St. Petersburg, Russia
Tel: (7812) 2985643
Fax: (7812) 3166583

ALTER LOGO
Krzhizhanovskogo Str. 23, corp. 5
113218 Moscow, Russia
Tel: (7095) 1240852
Fax: (7095) 1294333
also "Hasta" Salon-shop, Kostina Str. 22,
603086 Nizhny Novgorod, Russia
Tel: (78312) 337585

ARTEMIDA
Bolshaya Kalitnikovskaya Str. 42 a
(Pitchy Rinok)
109029 Moscow, Russia
Tel: (7095) 2705316 / (7095) 2700497
Fax: (7095) 2701297
Email: artemida@post.ru

AQUARIUM
37 Staro-Peterhofsky Prospect
198020 St. Petersburg, Russia
Tel: (7812) 2527566
Fax: (7812) 2527566

AT COMPANY
34 Narodnogo Opolchenia st.,
123423 Moscow, Russia
Tel: (7095) 1974433
Fax: (7095) 1961738

BIOSPHERE Ltd
Proveschenia 7, Corp. 3
194355 St. Petersburg, Russia
Tel: (7812) 5921422 and 5921800

EUROGROSS
Leningradskij Prospect 64
(MADI Institut Block)
125829 Moscow, Russia
Tel: (7095) 5648276, 5648277, 1550707
Fax: (7095) 9319619

EURO-ZOO
Bessanaya Str. 41
St Petersburg, Russia
Tel / Fax: (7812) 2983186

FALCON (also ZOOLEX)
Baltiyskaya Str. 8,
125315 Moscow, Russia
Tel: (7095) 1519664
Fax: (7095) 1554750

GIGLIOLI Ltd
Godovikova St. 9, Building 3
129085 Moscow, Russia
Tel / Fax: (7095) 2166848

GOLDFISH
Svoboda Str. 6
123481 Moscow, Russia
Tel / Fax: (7095) 4966303 / 4967357 /
4907473

GOLDFISH
Telezhnaya St. 7
193024 St. Petersburg, Russia
Tel: (7812) 3278353
Fax: (7812) 3278355

IRBIS, Filinov V.Y.
Verhne-Pecherskaya Str. 9 - 74,
603086 Nizhny Novgorod, Russia
Tel: (78312) 942687

KOVCHEG Co. Ltd
pr. Prosveshchenia 7/3
194355 St. Petersburg, Russia
Tel: (7812) 5922783
Fax: (7812) 5951690
Email: kovcheg@pop3.rcom.ru

KRITS LTD
Buharesti Str. 6
St. Petersburg, Russia
Tel: (7812) 1666082 and 3255902
Fax: (7812) 1666182

KuBisCo
Taganskaya Str. 29 - 97
Moscow, Russia
Tel: (7095) 9112680

MICHEL and Co
Zvenigorodshoe shosse 28
123317 Moscow, Russia
Tel: (7095) 2592198
Fax: (7095) 2561515

NYMPH
Musorgsky St. 82
62000 Yekaterinburg, Russia
Tel: (73432) 293066
Fax: (73432) 419834

PET
Volgogradskaya Str. 20
690069 Vladivostok, Russia
Tel: (74232) 460068
Fax: (74232) 321461

POLKAN LTD
Farforovskaya Str. 32
Moscow, Russia
Tel: (7095) 2474043

RARITET
1ay Magistral'naia 18, 4th Floor, Office 6,
123007 Moscow, Russia
Tel: (7095) 2352077
Fax: (7095) 2352651

A.A. ROZINOV
N. Suslovoy Str. 20 - 77
603106 Nizhny Novgorod, Russia
Tel: (78312) 333234
Fax: (78312) 686839

P.K. SEROVA A.V.
3rd Khoroshevasky Proezd. 5
123298 Moscow, Russia
Tel: (7095) 9410080
Fax: (7095) 9402285

SERVICE CONTRACT - CHELIABINSK
ZOO ASSOCIATION
Komsomolsky Prospect 110
454010 Cheliabinsk, Russia
Tel / Fax: (73512) 152322 and 146161

TORRENT
1-ay Magistralnaya 18
123007 Moscow, Russia
Tel: (7095) 2592726
Fax: (7095) 2595945

TMT PRODUCTS Co. Ltd
Petrovka Str 23,
109193 Moscow, Russia
Tel / Fax: (7095) 9286045

VALTA JSC
70 / 3 Kashirskoe Shosse
115409 Moscow, Russia
Tel: (7095) 3241861
Fax: (7095) 3203324

YUTTA Co. Ltd
Ostrovityanova Str. 1
Moscow, Russia
Tel: (7095) 4348110
Fax: (7095) 9381483

ZOOSERVICE
Kirpichnaja MPS St. 13
248025 Kaluga, Russia
Tel: (70842) 121662
Fax: (70842) 121663

Annex 1

Pet accessory products

1. Dogs

- Behavioural and training aids, show training equipment and dog handling equipment including protective clothing for dog trainers and handlers e.g. gloves, arm and leg protectors, suits and boots; training halter, harness, collars and leads, flexible batons, whistles audible and silent ie. special pitch
- Beds, baskets and bedding including mats, mattresses, rugs, sheets and cushions
- Bones, chews, made both from natural materials e.g. cattle hide, pigs ears, salmon skin, rubber, etc. and from man-made materials e.g. polyurethane, vinyl, rope
- Clothes and attire including coats and jackets, raincoats, tracksuits, bathrobes, knitwear, hats, boutique and fashion wear including neckwear and costume jewellery, protective boots for special working dogs, made of nylon, leather, waterproof material
- Collars, leads, choke chains and allied items including show collars made from leather, synthetic, rope or reflective material, also battery-operated flashing collars
- Car safety harness; car seat covers; car grilles, barriers and guards; car boot liners
- Dog toilets
- Drinking bowls, feeding bowls and dishes, place and feeding mats; automatic feeders made of aluminium, ceramic, plastic, stainless steel or stoneware
- Electronic training aids - fencing, training and correction collars, furniture protecting cushions
- Exercise pens and runs, gates and other pet management aids
- Harness
- Hunting accessories - collars, leads, training kits, training scents
- Hygiene accessories - toothbrushes, dental cleaners, hygiene pants, scoops and rakes
- Housing - cages, crates, kennels, portable pet enclosures, kennel signs, kennel heaters
- Identity tags and tubes
- Leads and retractable leads and muzzles made of leather, synthetic material or metal
- Reflective safety attire - collars, etc.
- Bags for dog faeces and waste
- Toys - made of rubber, plastic, latex, wood, rope, cotton also interactive toys and games
- Travel carriers, baskets and bags made of wickerwork, cane, metal, textile, plastic, wood, board, also two-wheel bicycle trailers. Airline dog carriers.
- Travel accessories - portable water bowl, travel bed roll, protective paw boots
- Water Accessories - life jackets, floating toys

2. Cats

- Beds, cat houses, waterbeds
- Cat furniture including scratching posts and climbing trees - single and multi-level, cat aerobic centres
- Cat litter and absorbents made of alfalfa, mineral, wood shavings and sawdust, vegetable and paper-based material
- Cat safety netting
- Collars, harnesses and leads made from leather, rope, metal, synthetic and textile material
- Collar bells
- Cushions, mats and mattresses
- Drinking bowls, feeding bowls and dishes made of aluminium, ceramic, plastic, polypropylene, stainless steel or stoneware
- Electronic training aids - furniture protection cushions
- Harnesses
- Identification - tags and tubes; talking (battery-operated) tags
- Litter pans made of metal, paperboard or plastic; pan liners, trays, scoops and spoons
- Pet flaps or doors
- Toys - interactive e.g. spinners, feather, motorised; catnip items
- Travel carriers, baskets, cases and bags
- Water Accessories - life jackets

3. Other small animals

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

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

- Head collars made from leather, plastic, rope, textile material
- Lead reins
- Backpacks and panniers

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

- Bathing appliances, bath tubs and self-service dog washing cubicles
- Brushes, combs and flea combs
- Clippers and trimmers, hand-operated and electrical
- Cosmetics including mascara for colouring/streaking dogs' hair
- Grooming tables, gloves and posts
- Dryers and dryer stands
- Muzzles
- Nail cutters, files, tweezers and scissors
- Show crates, show tables, control posts

6. Cage birds, ornamental poultry and wild birds

- Aviaries both indoor and outdoor, netting, frames, panels and bird cage barriers
- Avian speech instruction disks (CD)
- Bird charcoal
- Breeding accessories
- Cages including breeding and show cages
- 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 and plants, wood, plastic, acrylic, rawhide, leather, rope, rubber, cotton and other textile material, also of multiple material. Also musical toys.
- Cage covers
- Feeders and drinking containers including feed hoppers, feeding trays, cup and water bottle holders, cuttlebone holders
- Grooming tools - nail clippers and files, bill cutters, preening scissors
- Heaters and incubators
- Nesting boxes made of hair, wood, twigs, basket work, hemp, rattan, straw, wire, plastic, etc.
- Nest material and litter including loose sand, gravel and pelletized litter made of wood for cages and aviaries, sanded sheets and gravel paper, liners for cage bottoms
- Stands for cages
- Stands for parrot-like birds, also harnesses and leashes
- Travel carrier cages
- Wild bird products including outdoor feeders, fountains and baths

7. Reptilia and amphibia

- Ant keeping accessories - tanks, stairs, tubes, water feeder, tunnelling sand, tank stands
- Cork sheets
- Food dishes
- Handling equipment - carrying cases, gloves, handling stick, leashes, collars, harness, probes, tongs and hooks

- Housing including cages
- Heaters, heat pads, heat rocks, thermostats, basking light, incubators
- Lighting fixtures - fluorescent, full spectrum and incandescent
- Paludaria
- Plants for tanks, terraria and vivaria
- Reptile bedding
- Tanks, terraria and vivaria
- Terrarium decor - backgrounds, branches of trees and plants e.g. manzanita, caves, hide boxes, bog oak pieces, ornaments and decorative sculptures made from wood, roots and resin; artificial grass mats
- Terrarium substrate - gravel, stone and sand
- Terrarium stands and cabinets
- Terrarium - lids and hoods
- Toys for tanks, terraria and vivaria
- Travel carrier cages
- Turtle bowls and tanks

8. Ornamental fish-keeping

- Aquaria, fish tanks and goldfish bowls, aquarium hoods and covers, aquarium illumination
- Aquaria stands, frames and cabinets of wood or metal
- Aquatic and water plants including planting tubs, containers and other accessories
- 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. (*Live corals, like anemones, are invertebrate animals and are therefore not accessories*)
- Automatic fish food dispensers and feeding rings
- Breeding and spawning mats and traps
- Cleaning equipment for aquaria, tanks and bowls, including brushes and sponges
- Compressors, air pumps, water pumps, fountain and watercourse pumps
- Condensation trays
- Decorative backings for aquaria and tanks
- Dip nets
- Filters and filtering materials (carbon, charcoal, diatomaceous earth) and accessories including water circulators
- Pond and pool including pool liners made of plastic material or fibreglass, water courses, other accessories including cover netting
- Pond and pool ornamental fountains, fountain kits, jets and waterfalls, lighting equipment
- Sea salt

- Sealer guns and sealant
- Thermometers, thermostats and heaters
- Water testing kits and equipment

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

- Books, magazines
- Burial markers, caskets and urns
- Collectibles including animal paintings, prints, lithographs, sculptures and other handicraft made from wood, metal, glass, textiles, ceramic, etc.
- First Aid Kits for pets
- Other articles with pet-related images - buttons, jewellery, door mats, figurines, key chains, tags and rings, leather wallets, magnets, paperweights, purses, decals, stickers and transfers, taxidermy including pet reproductions and stuffed animals, T-shirts and other items of clothing; umbrellas, pet and animal-theme note cards, greeting cards and stationery; trophies; wall plaques, posters, cushions, covered with printed material or needlepoint work featuring replicas of pet-related paintings and themes.
- Videos and films for pet care and training and providing information for pet keepers. Special videos and films for the entertainment of pets. CD-ROMs providing music for pet entertainment.

Annex 2

1. In a particular region of the Russian Far East, the human population is 637,000. The number of family units is stated to be 199,000, based on 3.2 persons per family. Veterinary sources estimate that the percentage of families keeping pets is as follows - dogs 54%, cats 72%, cage birds 12% and ornamental fish 9%. The same sources estimate the following number of pets - dogs 69,700, cats 83,300, cage birds 21,300 and families with ornamental fish, 9,400. It is difficult to reconcile these two sets of data.

2. Although all dogs should be registered with the local authorities, the number actually registered in St. Petersburg for example, is probably less than 20%.

3. In some regions, particularly in rural areas, dogs and cats are considered as primarily working animals i.e. used for hunting, guarding and other activities. When statistics are prepared it is quite possible that dogs, cats and ornamental poultry may be included under the heading of domestic animals, and vice-versa, i.e. other domestic animals are included under the heading of pets.

Other Eastern and Central European Countries

Poland

Market characteristics

In 1997 the total value of the Polish market for all pet products, including pet food, pet accessories and pet health and care products was estimated to be between US\$125 million and US\$150 million. The retail value of the pet accessories market is around US\$30 million. The number of inhabitants is 38.6 million and there are around 13 million households. 67% of the population lives in urban areas where the average number of persons per household is around 2.85, while the average size of a rural household is 3.59 persons.

Dogs

There are considerable variations in estimates of the number of dogs kept as pets, some are as high as 7 million while others suggest a much lower figure of around 5 million. It is suggested that the number is probably in the region of 5.5 million. There is general agreement that large dogs are becoming more popular among younger pet owners. The reasons given are that many are kept as guard dogs and that it is a current fashion. Older persons generally keep small dogs.

Cats

Estimates of the number of cats range between 4 million and 5 million.

Cage birds

Trade estimates suggest that around 8% of all households keep cage birds. This would indicate a cage bird population in the region of 3.5 million to 4 million.

Other small animals, including rodents and reptiles

Although there are many 'other small animals' kept as pets, trade sources are unable to give realistic estimates. It is assessed that the number is probably in excess of one million.

Ornamental fish

Before 1989 this was a very popular hobby and in the region of 10% of households kept ornamental fish. Currently this figure is around 5%. Ornamental fish includes both freshwater and saltwater or marine fish. The number of households who keep fish is probably around 650,000.

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 enormous number of different products it is not possible to indicate market prices.

Market access

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

The sales tax on pet accessories is 22%, while sales tax on prepared pet food is only 7%.

Packaging and labelling

The type of packaging used should take into consideration protection of goods from physical damage. While many locally produced accessories are sold in very basic packaging, an increasing number of imported pet accessories are already available in attractive, eye-catching, presentation packs. It is only a matter of time, before locally produced goods will rival imports in presentation.

Products offered for sale in Poland must be labelled in the Polish language.

Trade channels

Intermediaries include agents, importers and wholesalers. The main importers/distributors include: Badis, Euro-Zoo, Miro and Pabemia - Zoocentre.

Retail distribution is both through specialized retail outlets and the food/grocery channel.

(1) Specialized retail outlets

Outlets under this heading include: retail pet shops, shops selling hunting and fishing/angling accessories, pet grooming parlours, animal hospitals, clinics, veterinary practices, open-air and semi-enclosed markets with market stalls. The total number of pet shops in Poland is between 1,000 and 1,500. This figure includes shops-in-shops i.e. pet shops and/or pet departments located in grocery outlets. In Warsaw, for instance, there are around 200 outlets selling pet products, this number includes supermarkets with their own pet departments. Lodz, with 1.2 million inhabitants, has around 20 pet shops. The majority of these have an average area of between 20 and 30m².

(2) Food and grocery channel

It is estimated that some 50 of those supermarkets with an area larger than 2,000m² sell pet accessories. In Poland there are already a number of well-established supermarket chains.

Sales promotion

Standard promotional methods are used. To reach importers, distributors and retailers, trade fairs are currently the most effective means. There is, as yet, no trade magazine. To reach end-users, pet product manufacturers and distributors use television and consumer magazines.

There is only one pet trade fair, PET FAIR which is held every two years during May in Łódz. The 5th Pet Fair was held in 1997 and there were 89 Polish and foreign exhibitors. The event was visited by 6,000 persons, including members of the public. Other fairs and exhibitions in Warsaw, Sopot, Katowice and Poznan are primarily dog shows and cat shows.

Details of trade fairs and titles of magazines for pet owners are provided under the section 'Useful addresses'.

Commercial practices

Import prices are generally quoted CIF or FOB. Initially most export/import transactions are on a cash with order basis. After a reasonable confidence level has been established between the parties concerned, business is usually conducted on a cash against document (CAD) basis.

The number of importers able to read and speak a second language, German or English, is increasing. However not all Polish importers read and speak a second language. It is therefore highly desirable, particularly when exporting to Poland, to prepare sales material in the Polish language. 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

Trade estimates suggest that the market for pet food is growing by 20% in real terms every year. It is probable that the pet accessory market is increasing at a slightly lower rate.

Addresses

Trade fairs

PET FAIR
held every two years during May in Łódź,
next event 1999
Organizers: MTL - Łódź International Fair
Ltd
199 Wolczanska Street
90-531 Łódź, Poland
Tel: (4842) 362983 and 368678
Fax: (4842) 372935

Consumer magazines and trade Publications

Aqua Magazyn
ul. Morcinka 1
41-106 Siemianowice, Poland
Tel / Fax: (4832) 2283260

Moj Pies (Magazine for dog owners)
Wprost, ul. Nowy Swiat 60
00-042 Warsaw, Poland
Tel: (4822) 6265632
Fax: (4822) 6263533

Zywe Hobby
ul. Krolowej Jadwigi 68
30-209 Krakow, Poland
Tel: (4812) 2674711
Fax: (4812) 2737780

Trade associations *(in the process of formation)*

c/o Mr Eugeniusz Czyblis,
General Director, Euro-Zoo
Ul. Szpitalna 1C
05-270 Marki k. Warszawy, Poland
Tel: (4822) 7812640 and 7812641
Fax: (4822) 7812644

Major wholesalers and distributors

AKIPOL (SPOLKA Z.O.O.)
Ul. Starolecka 2 / 4
61-361 Poznan, Poland
Tel: (4861) 774821
Fax: (4861) 485531

ANBI HURTOWINA
Ul. Swietlicka 13
04-266 Warsaw, Poland
Tel: (4822) 154505
Fax: (4822) 260256

AQUABORO
Import - Export, ul. J. Cygana 4
45-131 Opole, Poland
Tel / Fax: (4877) 538831

AQUA NURT
Ul. 3 Maja 78,
62-030 Lubon k/Poznania, Poland
Tel / Fax: (4861) 8102705
Email: aquanurt@friko.onet.pl

AQUA SZUT
Opolska 11/19
52-010 Wraclow, Poland
Tel: (4890) 313372
Fax: (4871) 3424564

BADIS
Ul. Ratuszowa 1 / 3
03-461 Warsaw, Poland
Tel: (4822) 6196661
Fax: (4822) 6189165

DOG-MAT
Al. Niepodleglosci 655 A
81-855 Sopot, Poland
Tel: (4858) 248390 and 514697
Fax: (4858) 248390

DORADO
ul. Morelowskiego 32
540430 Wroclaw, Poland
Tel: (4871) 634297
Fax: (4877) 634297

EURO-ZOO (Spolka z.o.o.).
Ul. Szpitalna 1C
05-270 Marki k. Warszawy, Poland
Tel: (4822) 7812640 and 7812641
Fax: (4822) 7812644

HOBBY
ul. Plocka 3
85-659 Bydgoszcz, Poland
Tel / Fax: (4852) 411311

MIRO (Dog and Cat Company)
ul. Sienkiewicza St. 75 / 77
90-057 Łódź, Poland
Tel: (4842) 371760
Fax: (4842) 371761

PABEMIA - ZOOCENTRE
Ul. Tukana 3
02-843 Warsaw, Poland
Tel: (4822) 26439466 and 26439468
Fax: (4822) 26439467
Email: pabemia@zigzag.pl

PRIMAVERA
Al. St. Zjednoczonych 67, paw. D-6
04-024 Warsaw, Poland
Tel / Fax: (4822) 108375

SOD
ul. Komunalna 1A
62-700 Turek, Poland
Tel: (4863) 785493
Fax: (4863) 785493

TROPICAL
Andrzej Ogrodnik
Wolnosci 69
41500 Chorzow, Poland
Tel: (4832) 1715107
Fax: (4832) 416224

TUPTUS - 2
Ul. Przewozowa 4
44-206 Rybnik, Poland
Tel: (4836) 4554489 / (4890) 308484

ZOOLOG P.P.i.H.Z.
Ul. Kobierzycka 24
52-315 Wroclaw, Poland
Tel / Fax: (4871) 676720

The three Baltic Republics - Estonia, Latvia and Lithuania

The following is a brief summary of pet trade activities in the three Baltic Republics.

Market characteristics

In 1997 the value of the Latvian market for pet accessories was estimated to be in excess of US\$3 million. It is possible that the size of the market in the three Baltic Republics could be in excess of US\$10 million.

The number of inhabitants in these three countries is Estonia 1.6 million, Latvia 2.7 million and Lithuania 3.8 million. The number of households in these three countries is estimated to be as follows: Estonia 550,000, Latvia 950,000 and Lithuania 1.3 million.

A single information source for Latvia indicated the following statistics: dogs - 550,000, cats - 900,000, cage birds - not known, other small animals - between 300,000 and 400,000. The number of households with aquariums for ornamental fish is 25,000.

Data is not available for Estonia nor Lithuania. Since there are no great cultural differences between the three Baltic Republics, it is possible that the combined pet population of the three countries could be: dogs - 1.5 million, cats - 2.7 million, other small animals - 1 million, and the number of households with aquariums 75,000.

Trade channels

The total number of pet shops in Latvia is 58.

Sales promotion

Standard promotional methods are used. To reach importers, distributors and retailers, Trade fairs are currently the most effective means. There is, as yet, no trade magazine. To reach end-users, pet product manufacturers and distributors use television and consumer magazines.

There are Trade fairs in Latvia and Lithuania. The Second International Fair and Festival Garden and Interzoo was staged in Riga, Latvia in May 1997. There were 60 trade stands of which 20 were pet trade stands. The fair was visited by 10,000 persons. The next fair is scheduled to take place in May 1998. ZOOPANORAMA, the first pet trade fair in Lithuania will be held in March 1998 at the Exhibition Centre LITEXPO in Vilnius.

Details of Trade fairs and titles of magazines for pet owners are provided under the section 'Useful addresses'.

Commercial practices

While many importers in the three Baltic Republics read and speak Russian, they often do not read and speak English, French nor German.

Market prospects

As living standards increase in the three Baltic Republics so will the amount of money spent on pet accessories and services. These markets are forecast to show greater expansion than markets in Western Europe, although it is impossible to quantify this growth with any degree of precision.

Useful Addresses

Estonia

Major wholesalers and distributors

RETI
Tatari 3
EE 0001 Tallinna, Estonia
Tel: (37222) 454236
Fax: (3722) 454816

Latvia

Trade fairs

GARDEN and INTERZOO
held in May 1998 in Riga
Organizers: R.A.S.A-EKSPO,
3 M. Monetu Street
Riga LV 1901, Latvia
Tel: (371) 7213637 / (371) 7213729 /
(371) 7216850
Fax: (371) 7212598 / (371) 7226409

Trade publications and consumer magazines

'Friend'
Daugavgrivas str. 6
Riga, Latvia
Tel: (371) 7613171
Fax: (371) 7145685

Major wholesalers and distributors

AZOR-NISK
Avotu Iela 7
Riga, Latvia
Tel: (371) 27284978

BIERINMUIZA and PARTNERS
Brivibas Iela 193
Riga, Latvia
Tel: (3712) 270608
Fax: (3712) 271402

DICTUM
Brivibas Iela 276
Riga, Latvia
Tel: (371) 7552485 / 7554916
Fax: (371) 7821280

KARSTEN CASH and CARRY
Bujlu Iela 43/45
Riga, Latvia
Tel: (371) 7407325 / 7407327
Fax: (371) 7407328

NIS-K
Gertrudes Iela 3
Riga, Latvia
Tel: (3712) 299825 / 299742

FIRM 'TROPIC'
119 Kr. Barona str.
Riga LV 1012, Latvia
Tel: (3712) 299420
Fax: (3717) 312046

Lithuania

Trade fairs

ZOOPANORAMA March 1998
held in March 1998 at Lithuanian
Exhibition Centre LITEXPO in Vilnius
Organizers: Company "Beile"
Laisves ave. 5
2600 Vilnius, Lithuania
Tel / Fax: (3702) 761934

Major wholesalers and distributors

EURO-ZOO
Zirmuny 139 A - 208
2012 Vilnius, Lithuania
Tel: (3702) 762608
Fax: (3702) 761934

A /A VETERINARIJOS APRUPINIMO
Raudondvario Plentas 164
3000 Kaunas, Lithuania
Tel: (3707) 265296
Fax: (3707) 774551

Czech Republic

Market characteristics

In 1997 the total value of the Czech market for all pet products, including pet food, pet accessories and pet health and care products was estimated to be between US\$12 million and US\$14 million. The retail value of the pet accessories market is between US\$4 million and US\$5 million. The number of inhabitants is 10.9 million and there are around 3.2 million households.

Trade sources estimate the pet population as follows: dogs - 1.3 million; cats - 1.5 million, cage birds - between 1.5 million and 2 million; other small animals - 500,000. The number of households with aquariums for ornamental fish is around 240,000.

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 enormous number of different products it is not possible to indicate market prices.

Market access

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

Packaging and labelling

The type of packaging used should take into consideration protection of goods from physical damage. Whilst many locally produced accessories are sold in very basic packaging, an increasing number of imported pet accessories are already available in attractive, eye-catching, presentation packs. It is only a matter of time before locally produced goods will rival imports in presentation.

Products offered for sale in the Czech Republic must be labelled in the Czech language.

Trade channels

Intermediaries include agents, importers and wholesalers. The main importers/distributors include: Placek, Botia and Askino. Retail distribution is both through specialized retail outlets and the food/grocery channel.

Specialized retail outlets. Outlets under this heading include: retail pet shops, shops selling hunting and fishing/angling accessories, pet grooming parlours, animal hospitals, clinics, veterinary practices and open-air and semi-enclosed markets with market stalls. The total number of pet shops in the Czech Republic is between 800 and 900, many of them are quite small.

Food and grocery channel. Some grocery outlets including supermarkets sell pet accessories.

Sales promotion

Standard promotional methods are used. To reach importers, distributors and retailers, a trade fair is an effective means. Because of the close proximity of Germany, many Czech importers and wholesalers visit the German pet trade fair Interzoo. There is, as yet, no trade magazine. There are around 11 magazines for pet owners and veterinarians. To reach end-users, pet product manufacturers, importers and distributors use television and consumer magazines.

There is only one trade fair, PROPET International Pet Supply Exhibition. This event, the second PROPET, was held in 1997 and there were around 75 exhibitors. It was staged at the same time as VETEX (third International Veterinary Fair) and INTERCANIS, the thirty-second International Veterinary Fair. The next event will be held in July 1998. Thereafter it will probably be held every two years.

Details of Trade fairs and titles of magazines for pet owners are provided under the section 'Addresses'.

Commercial practices

Import prices are generally quoted CIF or FOB. Initially most export / import transactions are on a cash with order basis. After a reasonable confidence level has been established between the parties concerned, business is usually conducted on a cash against document (CAD) basis.

Some of the larger importers are able to read and speak a second language, either German or English. Never-the-less it is highly desirable, particularly when exporting to the Czech Republic, to prepare sales material in the Czech language. 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

As living standards increase so will the amount of money spent on pet accessories and services. It is not possible to quantify this growth with any degree of precision. Because of its size, the Czech Republic could be considered as a Central European niche market.

Useful Addresses

Trade fair

PROPET Pet Fair and Exhibition
held every year in July
Organizers: BVV - Brno Trade fairs and Exhibitions
Vystaviste 1
64700 Brno, Czech Republic
Tel: (4205) 41152973
Fax: (4205) 41153059

Consumer magazines and trade publications

Chovatel
Radlicka 61
15000 Prague 5, Czech Republic
Tel: (4202) 57321181
Fax: (4202) 57320603

Pes Pritel Cloveka (Dog Owner Magazine)
Jungmannova 24
11366 Prague, Czech Republic
Tel: (4202) 4227723
Fax: (4202) 4225824

Svet Psu
Minerva CZ s.r.o., Ricanska 10
10100 Prague 10, Czech Republic
Tel: (4202) 734604
Fax: (4202) 67311463

Zemedelec
Zemska a.s., Rimska 14
12085 Prague, Czech Republic
Tel: (4202) 24212838
Fax: (4202) 24212714

Major wholesalers and distributors

ASKINO - JIRI TRNKA
Trybova 7,
60200 Brno, Czech Republic
Tel: (420) 43241628
Fax: (420) 43243144

ACTINIA IMPORT/EXPORT
Olommouka 35
61800 Brno, Czech Republic
Tel / Fax: (4205) 534639

AKVAZOO
Bajkalska 16
10000 Prague 10, Czech Republic
Tel / Fax: (4202) 731066 / 539805

BOHEMIA AQUA - TROPICAL FISH
EXPORT/IMPORT
Slezska 108
13000 Prague 3, Czech Republic
Tel: (4202) 743522 / 353341
Fax: (4202) 743522

BOTIA - JIRI BORNA
Lukesova 5
14200 Prague, Czech Republic
Tel: (420) 32795319 / 95316
Fax: (420) 32795317

CHOVEX
Dvorakova 14
737 01 Cesky Tesin, Czech Republic
Tel: (420) 696371490

CZECH-o-DOG s.r.o.
Dlouha 37
41 742 Krupka-Teplice, Czech Republic
Tel: (420) 41761257
Fax: (420) 41762246

FAUNAS - SLEZAK ST.
Osvobozeni 5
66441 Ostopovice, Czech Republic
Tel / Fax: (4205) 351013

GALLICAN
Augustinova 2081
14800 Prague 4, Czech Republic
Tel: (4202) 7933559

GIGLIOLI s.r.o.
V. Mokrinach 8
14700 Prague 4
Hodkovicky, Czech Republic
Tel / Fax: (4202) 4026438

PLACEK s.r.o.
Revolucni 1311 / III
29001 Podebrady, Czech Republic
Tel: (420) 3245262 / 4861
Fax: (420) 3244536

DAJANNA s.r.o.
Pod. Mlekarnou 608
7814 Behunovice, Czech Republic
Tel / Fax: (420) 6891840

Slovak Republic

Market characteristics

In 1997 the total value of the Slovak market for all pet products, including pet food, pet accessories and pet health and care products was estimated to be around 4 million and the retail value of the pet accessories market around US\$1.7 million. The number of inhabitants is 5.3 million and there are around 1.5 million households.

Trade sources estimate that the pet population is as follows: dogs - 430,000, cats - 500,000, cage birds around 600,000, other small animals - 150,000. The number of households with aquariums for ornamental fish is around 80,000.

Trade channels

Intermediaries include agents, importers and wholesalers. The main importers / distributors include: Giglioli and Tatrapet. Retail distribution is both through specialized retail outlets and the food/grocery channel. The total number of pet shops is around 300.

Sales promotion

Standard promotional methods are used. Many Slovak wholesalers visit the German pet trade fair Interzoo. There is no national pet trade fair nor are there any trade magazines. To reach end-users, pet product manufacturers, importers and distributors use television and consumer magazines.

Details of titles of magazines for pet owners are provided under the section 'Addresses'.

Market prospects

The comments made about the Czech Republic also apply to the Slovak Republic.

Useful Addresses

Trade publications

CHOVATEL - Magazine for Pet Owners
Animapress, Podova 32
92901 Dunajska Streda, Slovak Republic
Tel / Fax: (421) 709527081

KYNOLOGICKA REVUE - Magazine for
Dog Owners
S.T.E.R.,
04455 Velka Ida 3, Slovak Republic
Tel / Fax: (421) 9592154

Major wholesalers and distributors

GIGLIOLI s.r.o.
Pieskovcova 16 A, Devinska Nova-Ves,
00420 Bratislava 7, Slovak Republic
Tel / Fax: (4217) 770613

TATRAPET
Mirka Nespora 3
03101 Liptovsky Mikulas, Slovak Republic
Tel / Fax: (421) 84923289

Hungary

Market characteristics

The following is a brief summary of pet trade activities in Hungary. In 1997 the value of the Hungarian market for pet accessories was estimated to be in excess of US\$13 million. The market for all pet products including pet food, pet accessories and pet health and care products was estimated to be between US\$45 million and US\$55 million. The number of inhabitants is 10.3 million and the number of households 3.9 million.

Number of pets

Dogs - 2 million, cats - 2.5 million. Other small animals - about 350,000. Between 5% and 7% of households keep birds and the cage birds population is estimated to be 1 million. In urban areas between 5% and 6% of household have aquariums, while in the rural areas this figure is much lower. When considering the whole of Hungary, between 2% and 4% of households have aquariums.

Trade channels

There are around four major importers / wholesalers which include: Giglioli, Kallay, Panzi-Pet, Premium Pet Products and Aqua-Pet. The total number of specialist establishments selling pet products is around 2,000. This number includes pet shops, 300 garden centres and 150 veterinarians. Pet products are also sold by grocery outlets including supermarkets and department stores.

Market prospects

As living standards increase so will the amount of money spent on pet accessories and services. The Hungarian market is expected to expand, in real terms, by around 10% to 15% per year.

Useful Addresses

Major wholesalers and distributors

CZ-HOBBY k.f.t.
Volan utca 7
1171 Budapest, Hungary
Tel: (361) 2576546
Fax: (361) 2576546

TROPUS
Nyiri utca 43
6000 Kecskemet, Hungary
Tel: (3676) 484184

EURO ZOO MARKET k.f.t.
Lomnici utca 5
1221 Budapest, Hungary
Tel / Fax: (361) 2263913

GIGLIOLI k.f.t.
Timot utca 4 / A
1097 Budapest, Hungary
Tel: (361) 2621330
Fax: (361) 2626526

KALLAY AND CO. LTD
P.O. Box 10,
7608 Pecs, Hungary
Tel: (3672) 447273
Fax: (3672) 438509
Email: kallay@mail.dravanet.hu

NEPTUN LTD
Szanatorium Str. 7
1121 Budapest, Hungary
Tel: (361) 2752538
Fax: (361) 2004568

PANZI-PET
Kazinczy utca 22
1152 Budapest, Hungary
Tel: (361) 3067826

PREMIUM PET PRODUCTS and
AQUA-PET
Meta utca 31
1194 Budapest, Hungary
Tel / Fax: (361) 280 7253

Ukraine

Market characteristics

In 1997 the total value of the Ukrainian market for all pet products, including pet food, pet accessories and pet health and care products was estimated to be between US\$20 million and US\$40 million. The retail value of the pet accessories market was around US\$10 million.

The number of inhabitants is 50.9 million and it is estimated that there are around 16.5 million households. The figure in regard to the number of households and number of pets should be treated with a degree of caution (see Russian Federation - Assumptions and qualifications).

A single information source indicated the following data - 10 million dogs and 11 million cats. No information is available about the number of cage birds, other small animals, nor about ornamental fish.

Trade channels

There are around 15 wholesalers and several hundred pet shops.

Sales promotion

Standard promotional methods are used. The best developed media are consumer magazines for pet owners, and most are mainly of Russian origin. Animalproducts '97 was the only trade fair and was last staged in November 1997. There were some 20 exhibitors and it was visited by a few hundred persons. Details about the trade fair and titles of magazines for pet owners are provided under the section 'Useful addresses'.

Market prospects

The Ukraine market offers good possibilities to exporters in developing countries. Such exporters should contact the trade promotion organizations in the Ukraine listed below in order to obtain additional information, in particular on market access and trade channels.

Useful Addresses

Trade promotion organizations

The Ukrainian Chamber of Commerce and Industry
Information Department
33, ul. Bolshaya Zhitomirskaya
Kiev 254601, Ukraine
Tel: (38044) 2122911
Fax: (38044) 2123353
Email: apb@dpicci.kiev.ua

Joint-Stock Company 'UKRIMPEX'
(Ukrainian Foreign Trade Association)
22, Vorovsky Street
Kiev 252054, Ukraine
Tel: (38044) 2162174
Fax: (38044) 2162996
Email: root@ukrimpep.carrier.kiev.ua

Ukrainian Entrepreneurs Union of Small,
Middle-sized & Privatized Enterprises
(UEUSMPE)
P.O. Box 327/2
Kiev 252010, Ukraine
Tel: (38044) 2240670
Fax: (38044) 2241219

Trade fairs

ANIMALPRODUCTS '97
held in November at National Exhibition
Centre, Kiev
Organizers: TOO Lachin and Central
Administration of the Veterinary Medicine
and State Veterinarian Inspection
Academician Glushkov Avenue 1
252022 Kiev, Ukraine
Tel / Fax: (38044) 2469145

Major wholesalers and distributors

AQUARIUMIST LTD
G. Skovorody Str. 17-V
254070 Kiev, Ukraine
Tel: (38044) 4625948
Fax: (38044) 4171218
Email: eximdept@aquariumist.ru.kiev.ua

VERESEN-9 LTD
P.O. Box 154, Academician Vernadsky
Ave. 34/1, 252142 Kiev, Ukraine
Tel: (38044) 4440555
Fax: (380) 4527699

EVALUATION FORM

Accessories for Pets and Companion Animals

An Overview of the Market in Central and Eastern Europe

<p>1. PLEASE INDICATE HOW THIS BRIEF WAS OF USE TO YOUR ENTERPRISE.</p>	<i>Very useful</i>	<i>Fairly useful</i>	<i>Not useful</i>						
<i>Overall rating of this market brief</i>									
<i>For taking marketing decisions</i>									
<i>For establishing market contacts</i>									
<i>For market research</i>									
Comments (use reverse side, if necessary):									
<p>2. PLEASE INDICATE WHICH SECTIONS OF THIS MARKET BRIEF WERE THE MOST USEFUL. (Ranking : 1 = most useful to 9 = least useful)</p>	1	2	3	4	5	6	7	8	9
<i>a) Market characteristics</i>									
<i>b) Market access</i>									
<i>c) Prices</i>									
<i>d) Packaging</i>									
<i>e) Distribution channels</i>									
<i>f) Market prospects</i>									
<i>g) Useful addresses</i>									
<i>h) List of importers</i>									
<i>i) Statistics</i>									
3. WHAT OTHER MARKET ASPECTS SHOULD BE COVERED?									
4. WHAT IMPORT MARKETS ARE OF PARTICULAR INTEREST TO YOU?									
5. WHAT PRODUCTS WOULD YOU LIKE COVERED IN THE FUTURE									

(Please turn over)

<i>NAME:</i>	
<i>TITLE:</i>	
<i>COMPANY:</i>	
<i>STREET ADDRESS:</i>	
<i>POSTAL ADDRESS:</i>	
<i>CITY:</i>	<i>COUNTRY:</i>
<i>TEL:</i>	<i>FAX:</i>
<i>SIGNATURE:</i>	<i>DATE:</i>

<i>ADDITIONAL COMMENTS</i>

Please return this evaluation form to :

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