



**Pet Products &
Accessories Market
Research & Analysis
*UK 2010***

Pet Products & Accessories Market Size & Industry Review 2004-2010; SWOT & PEST Analysis, Product Mix & Key Trends 2004-2014; Pet Retailers' & Manufacturers Profiles & Key Financials; Market Forecasts to 2014

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Estimates Provided

In order to enable benchmarking, competitor analysis and facilitate further market research, MTW have provided estimates for turnover, profit before tax and number of employees for small, medium sized and other companies who are not obliged to submit this information to Companies House. As such, in the interests of clarity, all data relating to turnover, profit and number of employees provided in this report should be regarded as independent estimates by MTW. Whilst we endeavour to attain high levels of accuracy with these estimates, they may not reflect the actual figures of a company and should therefore be treated with caution.

1. Introduction to *Research & Analysis* Reports

1.1 Key Features & Benefits of this *Research & Analysis* Report

MTW's "*Research & Analysis*" market reports provide an independent, comprehensive review of recent, current and future market size and trends in an easy to reference format. Each report provides vital market intelligence in terms of size, product mix, SWOT, key trends and influences, supply and distribution channel trends. In addition, rankings by turnover, profit and other key financials for the market leaders are provided as well as a 1 page profile for each key player in the market. Contact, telemarketing & mailing details are also provided for each company to enable the reader to quickly develop sales leads.

Based on company sales returns which provide higher confidence levels and researched by market research professionals with experience in the industry, MTW's *Research and Analysis* reports are used as a foundation for coherent strategic decision making based on sound market intelligence and for developing effective marketing plans. MTW reports can also used as an operational sales and marketing tool by identifying market leaders, enabling the reader to quickly grow sales to new clients and focus marketing budgets.

This report includes:-

- **Market Size, PEST, SWOT & Trends – Historical, Current & Future**

Based on sales data from a representative proportion of the industry, this report provides market size by value over a ten-year period. As they are based on quantitative data as well as qualitative input from the industry, our reports are more accurate than other qualitative based reports and offer better value for money. By combining the best of both quantitative and qualitative input, we offer our clients greater confidence in our market forecasts as well as discussing key market trends and influences from a qualitative perspective.

- **Product Mix – Past, Current & Future**

This report identifies the key product sectors in the market and provides historical, current and forecast market share estimates for each, alongside qualitative discussion on key trends for each segment of the industry. With input for this report being both qualitative and quantitative we are able to offer an effective insight into the core components of the market, as well as forecasting future market shares.

- **Distribution Channel Sales – Past, Current & Future**

The report identifies the key distribution channels that drive demand for this market and provides a current, historical & future market share estimate. This enables the reader to identify the key driving forces behind current market demand and adapt business tactics accordingly. With forecasts of market share by key channels also provided, the reader is able to undertake strategic decisions with greater confidence as well as basing marketing strategies on solid market intelligence.

- **Market Leaders Ranking**

This report identifies the key players in the market and ranks them by a number of criteria, including turnover and profitability. This enables the reader to identify the most relevant potential key customers in a market, understand their current position in the market and quickly identify new targets. Also, MTW provide a turnover estimate for every company included in the report, enabling the reader to develop market share estimates.

- **Company Profiles & Sales Leads – Retailers & Manufacturers**

This report includes a 1 page profile for each company including full contact details for developing fast sales leads; 4 years of the most recent key financial indicators; and MTW's '*at a glance*' chart, enabling the reader to quickly gauge the current financial health of a company.

- **Relevant Research, Saving You Time**

MTW Research have been researching and writing market reports in these sectors since 1999 and as such we are able to develop a company listing which is more relevant to the market, rather than automatically selecting companies to be included by industry code. Our reports represent excellent value for money and don't bombard you with irrelevant financial data; they are designed to enable you to engage in fast and effective market analysis. We focus on providing what's important in an easy to reference and use format.

2. UK PET PRODUCTS & PET ACCESSORIES MARKET

2.1 EXECUTIVE SUMMARY & MARKET OVERVIEW

The UK Pet Products & Accessories Market is defined as consisting of the sale of new products designed for use by UK consumers with domestic animals who are primarily regarded as pets. Specifically, this report reviews the total UK pet products market and further examines pet accessories sales between 2004 and 2010 with forecasts to 2014 segmented by each of the main sectors below:-

- **Pet Toys** – dog, cat, small animal, fish, reptile etc
- **Pet Housing & Bedding** – cages, tanks, aquariums, bedding etc
- **Grooming, Health & Well-Being** – vitamins, treatments, grooming etc
- **Collars & Leads** – harnesses, restraints, ID tags etc
- **Feeding Accessories** – Pet bowls, feeding utensils, water bottles, dishes etc
- **Miscellaneous Pet Products** – e.g. catflaps, clothing, letterbox cages etc

The report also provides top line market size & product mix in 2010 for the key sectors within the overall UK pet products industry, including:-

- **Pet Food**
- **Pet Accessories** (as above)
- **Kennelling / Pet Holidays**
- **Vets / Insurance**
- **Other Pet Expenditure**

All prices in this report are measured at retail selling prices excluding any value added tax, other taxes and delivery charges. Products designed for use with farm animals, horses and other livestock are specifically excluded from this report.

The methodology for this report is based on the last 4 years of financial data from the industry coupled with a wide range of secondary sources including companies involved in the industry, websites, Companies House, HM Government, trade journals, credit reference agencies, industry commentators and our own experience of researching this market for more than a decade.

The total UK pet products market is estimated to have grown from a value of around £xx billion in 2004 to £xx billion by year end December 2010, reflecting growth of some xxx % over a 6 year period. Whilst pet ownership has more recently xxxxxxxxxxxxxxxx in the UK, xxxxxxxxxxxxxxxx xxxxxxxxxxxxxxxx performance is likely to xxxxxxxx as manufacturers and distributors continue to xxxxxxxx through a range of xxxxxxxx xxxxxxxx.

The UK pet accessories market is currently estimated to be worth just over £ xxxxxxxx million in 2010, reflecting around x% of the total UK pet products & services market. This sector has also experienced xxxxxxxx, xxxxxxxx inflation xxxxxxxx in recent years, driven by a wide range of factors – both external to the

market such as socio-demographic issues; and within the industry such as product and market development xxxxxxx strategies.

The xxxxxxx sector of the pet accessories market is accounted for by toys, with a market value of just over £ xxxxxxx million in 2010. Products designed for grooming or to promote health and well-being are currently estimated to account for around xxxxxxx % of the sector, whilst housing and bedding products are xxxxxxx a xxxxxxx sector, accounting for around xxxxxxx % of total sales in 2010.

Harnesses and leads currently account for around xxxxxxx % of the market in 2010. Current xxxxxxx plans to increase the xxxxxxx of dog owners is likely to sustain xxxxxxx in sales of products which provide xxxxxxx xxxxxxx a dog. Miscellaneous products, which include a wide variety of products including cat flaps, pet clothing, letter box cages, car seats etc are currently valued at around £ xxxxxxx million. The feeding and bowls sector accounts for around xxxxxxx % of the market in 2010, reflecting a value of just under £ xxxxxxx million in 2010.

In terms of distribution, the specialist pet retailers sector accounts for around xxxxxxx of the market sales in 2010 and remains xxxxxxx in volume terms by xxxxxxx xxxxxxx retailers operating on a xxxxxxx basis. This sector primarily operates within the medium-higher value end of the market, with these retailers continuing to xxxxxxx over the last few years.

The xxxxxxx largest channel is accounted for by DIY and hardware retailers, with the larger national DIY multiples having xxxxxxx share in a number of sectors of the UK pet products market in recent years. In 2010, this sector accounts for around xxxxxxx % of the market by value. The development of the Internet has resulted in xxxxxxx to xxxxxxx for xxxxxxx retailers to establish a retail presence and offer xxxxxxx of products. xxxxxxx xxxxxxx through the lack of a high street presence also xxxxxxx retailers in this sector to xxxxxxx xxxxxxx on xxxxxxx – presently a key issue in the accessories market.

There is an apparent sense of xxxxxxx for more xxxxxxx xxxxxxx through a xxxxxxx to xxxxxxx levels of discretionary spending on xxxxxxx value products through the xxxxxxx and/or xxxxxxx xxxxxxx retailers which should feed through into xxxxxxx market value in the medium to longer term. Our forecasts suggest that xxxxxxx average xxxxxxx xxxxxxx xxxxxxx will continue to xxxxxxx market growth in the short term, with xxxxxxx consumer confidence supporting xxxxxxx term xxxxxxx, both in value terms and subsequently volume terms as xxxxxxx xxxxxxx xxxxxxx xxxxxxx.

Whilst larger pet retail multiples continue to xxxxxxx, performance remains xxxxxxx xxxxxxx through the xxxxxxx xxxxxxx and price xxxxxxx amongst the xxxxxxx retailers continues to xxxxxxx xxxxxxx to some extent. Forecasts are for xxxxxxx xxxxxxx growth for 2010 in overall terms, with a similar xxxxxxx xxxxxxx likely in H1 2011, before a more xxxxxxx xxxxxxx feeds through during H2, 2011. By 2014, the pet accessories market is forecast to reach a value of some £ xxxxxxx million, reflecting growth of around xxxxxxx % from the current position in 2010.

2.2 PET PRODUCTS & ACCESSORIES MARKET SIZE & TRENDS 2004-2014

2.2.1 Total UK Pet Products Market 2004-2014

The overall UK pet products market is currently valued at around £x billion at retailers selling prices in 2010, reflecting a sector which has experienced buoyant performance in recent years. The pet products market has consistently experienced above inflationary growth in recent years, buoyed by both rising pet ownership coupled with growth in average spend per pet.

The following chart illustrates our estimates of the performance of the overall UK pet products market since 2004, with forecasts to 2014:-

Figure 1: Total Pet Products Market – UK 2004 - 2014 By Value £bn

Sample

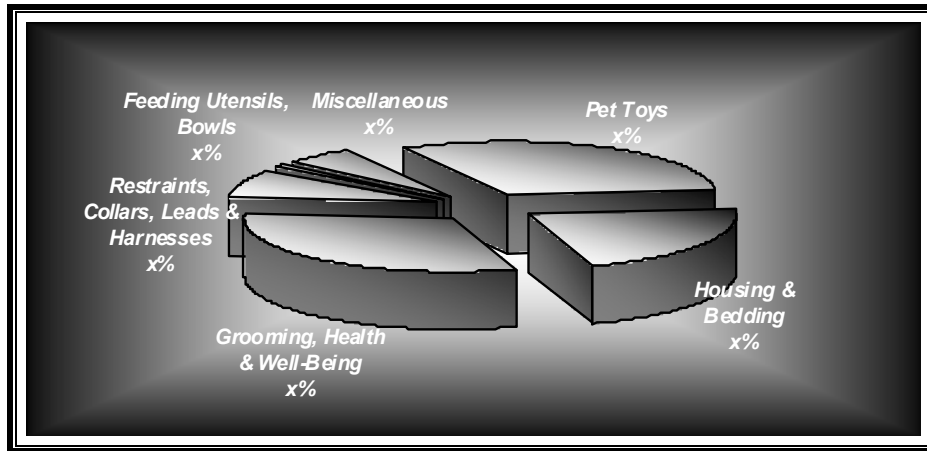
Source: MTW Research / Trade Estimates

3. PET ACCESSORIES TRENDS & SHARES

3.1 Share by Key Product Sector – 2010, 2004 & 2014

The share accounted for by each of the key product sectors within the UK pet accessories market in 2010 is illustrated in the following chart:-

Figure 14: Share by Key Product Sector in Pet Accessories Market 2010



Source: MTW Research / Trade Sources

As illustrated, the UK pet accessories market comprises of

3.3 Pet Housing, Bedding & Hygiene Market 2004 – 2014

The following chart illustrates the performance of the domestic pet hygiene, housing & bedding market by value since 2004 and forecasts to 2014:-

Figure 18: Pet Housing, Bedding & Hygiene Market by Value 2004-2014 £M

Sample

Source: MTW Research / Trade Estimates

Sales of pet housing, bedding and hygiene products are currently estimated to be worth around

4. PET PRODUCT MANUFACTURER PROFILES

The following section identifies some of the key UK pet product manufacturers and suppliers and provides a 1 page profile with key performance indicators for each. It should be noted that whilst we endeavour to include all the major players, inclusion or otherwise in the following section does not necessarily indicate a company's relevance in the market.

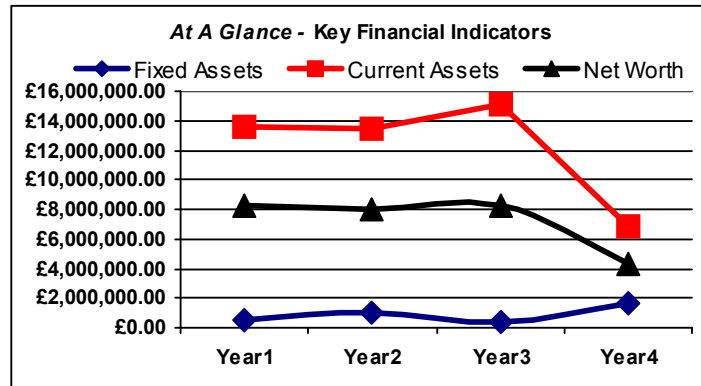
4.1 Pet Products Manufacturers Profiles & KPIs

Sample Company - Company Overview & 'At a Glance'

Address 1
Address2
Nottingham
Sample Postcode
Tel: SAmple

Sample Company is a private limited with share capital company, incorporated on 9 May 1960. The company's main activities are recorded by Companies House as "The manufacture, wholesale and distribution of pet food and accessories." In 2010, the company has an estimated 170-180 employees.

To year end December 2009, Sample Company is estimated to have achieved a turnover of around £24 million. Pre-tax profit for the same period is estimated at around £0.5 million.



The following table briefly provides a top line overview on Sample Company:-

Company Name	Sample Company
Brief Description of Activities	The manufacture, wholesale and distribution of pet food and accessories.
Parent Company	Sample Company
Ultimate Holding Company	Sample Company
Estimated Number of Employees	170-180
Senior Decision Maker / Director	Sample Name

The following table illustrates the company's key performance indicators for the last 4 years:-

Sample Company - 4 Year KPIs to Year End 31 May 09

Key Indicator £	Year End 28 May 06 (Year1)	Year End 3 Jun 07 (Year2)	Year End 1 Jun 08 (Year3)	Year End 31 May 09 (Year4)
Fixed Assets	£545,000.0	£1,035,000	£6,590,000	£10,660,000
Current Assets	£13,645,000	£13,425,000	£15,131,000	£6,825,000
Current Liabilities	£4,293,000	£4,746,000	£6,019,000	£4,785,000
Long Term Liabilities	£1,668,000	£1,685,000	£1,233,000	£8,398,000
Net Worth	£8,229,000	£8,029,000	£8,304,000	£4,302,000
Working Capital	£9,352,000	£8,679,000	£9,112,000	£2,040,000
Profit per Employee	£ 884	£-2,450	£2,886	£2,514
Sales per Employee	£102,407	£108,070	£114,688	£130,028

