



# **Pet Accessories Market**

## ***Research & Analysis***

### **UK 2019**

## **Report Sample**

**(Charts & market sizes / shares have been altered / redacted for sample purposes)**

**Pet Products & Accessories Market Size & Industry Review 2013-2019; SWOT & PEST Analysis, Product Mix & Key Trends 2013-2023; 90 Pet Retailers' & Manufacturers Profiles & Key Financials; Market xxxxxxxxxxxxxx xxx x xxxx xxxxxxxx to 2023**

**4th Edition**

**July 2019**

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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 xxxxxxxxxxxxxx xxx x xxxx xxxxxxxx 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 xxxxxxxxxxxxxx xxx x xxxx xxxxxxxx in our market xxxxxxxxxxxxxx xxx x xxxx xxxxxxxx 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 xxxxxxxxxxxxxx xxx x xxxx xxxxxxxx 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 xxxxxxxxxxxxxx xxx x xxxx xxxxxxxx future market shares.

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

The report identifies the key distribution channels that drive xxxxxxxxxxxxxx xxx x xxxx xxxxxxxx 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 xxxxxxxxxxxxxx xxx x xxxx xxxxxxxx and adapt business tactics accordingly. With xxxxxxxxxxxxxx xxx x xxxx xxxxxxxx of market share by key channels also provided, the reader is able to undertake strategic decisions with greater xxxxxxxxxxxxxx xxx x xxxx xxxxxxxx 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; 3 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 xxxxxxxxxxxxxx xxx x xxxx xxxxxxxxs with domesticated animals who are primarily regarded as pets. Specifically, this report reviews the total UK pet products market and further examines pet accessories sales between 2013 and 2019 with xxxxxxxxxxxxxx xxx x xxxx xxxxxxxx to 2023 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. pet clothing, catflaps, letterbox cages

The report also provides top line market size & product mix in 2019 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 3 years of financial data from more than 80 companies active in 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 2 decades.

The total UK pet products market is estimated to have xxxxxxxxxxxxxx xxx x xxxx xxxxxxxx to a value of around £x xxxxxxxxxxxxxx xxx x xxxx xxxxxxxx at retail selling prices in 2019. This reflects an industry which has xxx xxxxx xxxxx xx xxxxx xx x xxxxxxxxxxx xxx xx x xxxxxxxx xxx xx x xxxxxxxx xxxxx xxx x x xxxxxxx xx x xxx xx xxxxxxxxxxx x xxxzxx x x xxx xx x x x xx xx xxx lower levels of business and xxxxxxxxxxxxxx xxx x xxxx xxxxxxxx xxxxx xxxxx xx xxxxx xx x xxxxxxxxxxx xxx xx x xxxxxxx xx x xxx xx xxxxxxxxxxx x xxxzxx x x xxx xx x x x xx xx xxx.

Despite xxxxx xxxxx xx xxxxx xx x xxxxxxxxxxx xxx xx x xxxxxxx xxxxx xxx x xxxxxxx xx x xxx xx xxxxxxxxxxx x xxxzxx x x xxx xx x x x xx xx xxx, pet ownership levels xxxxx xxxxx xx xxxxx xx x xxxxxxxxxxx xxx xx x xxxxxxx xxxxx xxx x xxxxxxx

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xxxx xxxxxxx for pet products.

In addition, xxxxx xxxxx xx xxxxx xx x xxxxxxxxxxx xxx xx x xxxxxxx xxxxx xxx x x  
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xx xxxxx xx x xxxxxxxxxxx xxx xx x xxxxxxx xxxxx xxx x x xxxxxxx xx x xxx xx  
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xxxxxxxx in importance of the 'millennial' generation (xxxxx xxxxx xx xxxxx xx x  
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x x xxx xx x x x x xx xx xxx 'Generation Y' has xxxxx xxxxx xx xxxxx xx x  
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x x xxx xx x x x x xx xx xxx and significantly impacted the pet market in the last  
few years; xxxxx xxxxx xx xxxxx xx x xxxxxxxxxxx xxx xx x xxxxxxx xxxxx xxx x x  
xxxxxxxx xx x xxx xx xxxxxxxxxxx x xxxzxx x x xxx xx x x x x xx xx xxx purchasing  
behaviours.

This report is primarily concerned with the UK pet accessories sector which is  
expected to be worth some £xx xxxxxxxxxxxxxx xxx x xxxxx xxxxxxx at retailers  
selling prices, having xxxxxxxxxxxxxx xxx x xxxxx xxxxxxxd by just under 5% since  
2013 and by some 38% since 2013. Xxxxxxxxxxxxxxxx xxx x xxxxx xxxxxxx are for  
the market to exhibit rates of xxxxxxxxxxxxxx xxx x xxxxx xxxxxxx of around 4% in  
the short term with this likely to xxxxxxxxxxxxxx xxx x xxxxx xxxxxxx steadily in the  
medium to longer term, particularly given a resolution to the UK exiting the  
European Union and expected resurgence in the UK economy as xxxxxxxxxxxxxx  
xxx x xxxxx xxxxxxx xxxxxxxxxxxxxx xxx x xxxxx xxxxxxx steadily returns from 2020  
onwards.



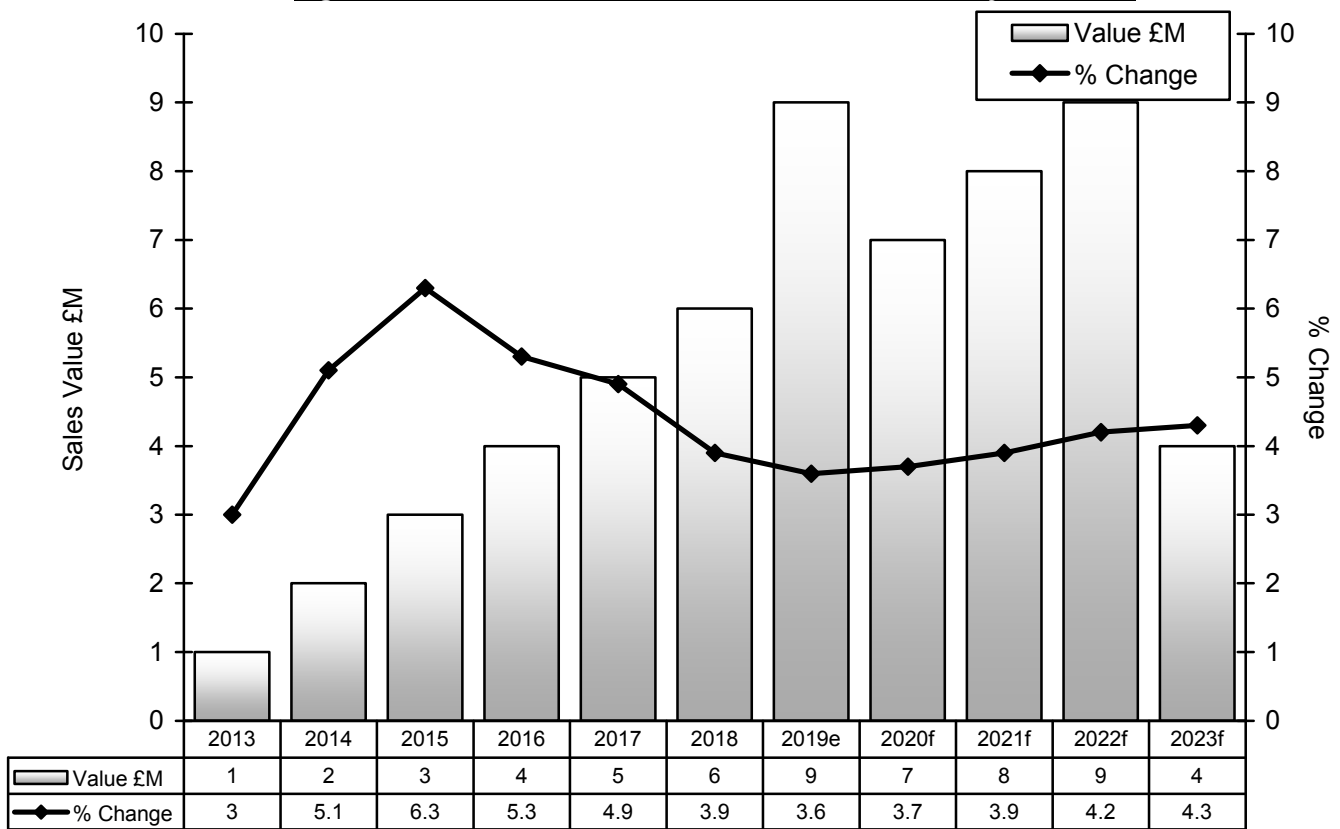
## 2.2 PET PRODUCTS & ACCESSORIES MARKET SIZE & TRENDS 2013-2023

### 2.2.1 Total UK Pet Products Market 2013-2023

The pet products market has proven to be relatively xxxxx x x xxxxxxxxxxx xxxxxxxx xxxxxxxxxxx xxxxxxxxxxx xxxxxxx xxxxxxx. In 2019 the overall UK pet products market is estimated to be worth just over £ xxxxx x x xxxxxxxxxxx xxxxxxxx xxxxxxxxxxx xxxxxxxxxxx xxxxxxx xxxxxxx xxxxxxxxxxxxxxxxxxx xxx x xxxxx xxxxxxx at retail selling prices, reflecting an industry which continues to xxxxxxxxxxxxxxxxxxx xxx x xxxxx xxxxxxx the overall UK economy.

The following chart illustrates the performance of the overall UK pet products market since 2013, with xxxxxxxxxxxxxxxxxxx xxx x xxxxx xxxxxxx to 2023:-

**Figure 1: Total Pet Products Market – UK 2013 - 2023 By Value £bn**



**Source: MTW Research / Trade Estimates (figures changed for sample)**

The total UK pet products market is estimated to have xxx from a value of around £xx xxxxxxxxxxxxxxxxxxx xxx x xxxxx xxxxxxx in 2013 to £6.01 xxxxxxxxxxxxxxxxxxx xxx x xxxxx xxxxxxx to year end December 2019, reflecting xxxxxxxxxxxxxxxxxxx xxx x xxxxx xxxxxxx of some 33% over a 6 year period. De to a xxxxxxxxxxxxxxxxxxx xxx x xxxxx xxxxxxx in pet ownership coupled with a sustained xxxxxxxxxxxxxxxxxxx xxx x xxxxx xxxxxxx in average spend per pet, sales of pet products are estimated to have xxxxxxxxxxxxxxxxxxx xxx x xxxxx xxxxxxx by around £1.49 xxxxxxxxxxxxxxxxxxx xxx x xxxxx xxxxxxx since 2013, illustrating the xxxxxxxxxxxxxxxxxxx xxx x xxxxx xxxxxxx rate of xxxxxxxxxxxxxxxxxxx xxx x xxxxx xxxxxxx the overall pet industry has experienced in recent years.

Since 2013, the pet products market has experienced both value and volume xxxxxxxxxxxxxx xxx x xxxx xxxxxxxx, with the market benefitting from societal shifts in shifting xxxxxxxxxxxxxx xxx x xxxx xxxxxxxx demographics and a rising population boosting volume xxxxxxxxxxxxxx xxx x xxxx xxxxxxxx; whilst product innovation and changing attitudes towards pets has underpinned xxxxxxxxxxxxxx xxx x xxxx xxxxxxxx value xxxxxxxxxxxxxx xxx x xxxx xxxxxxxx.

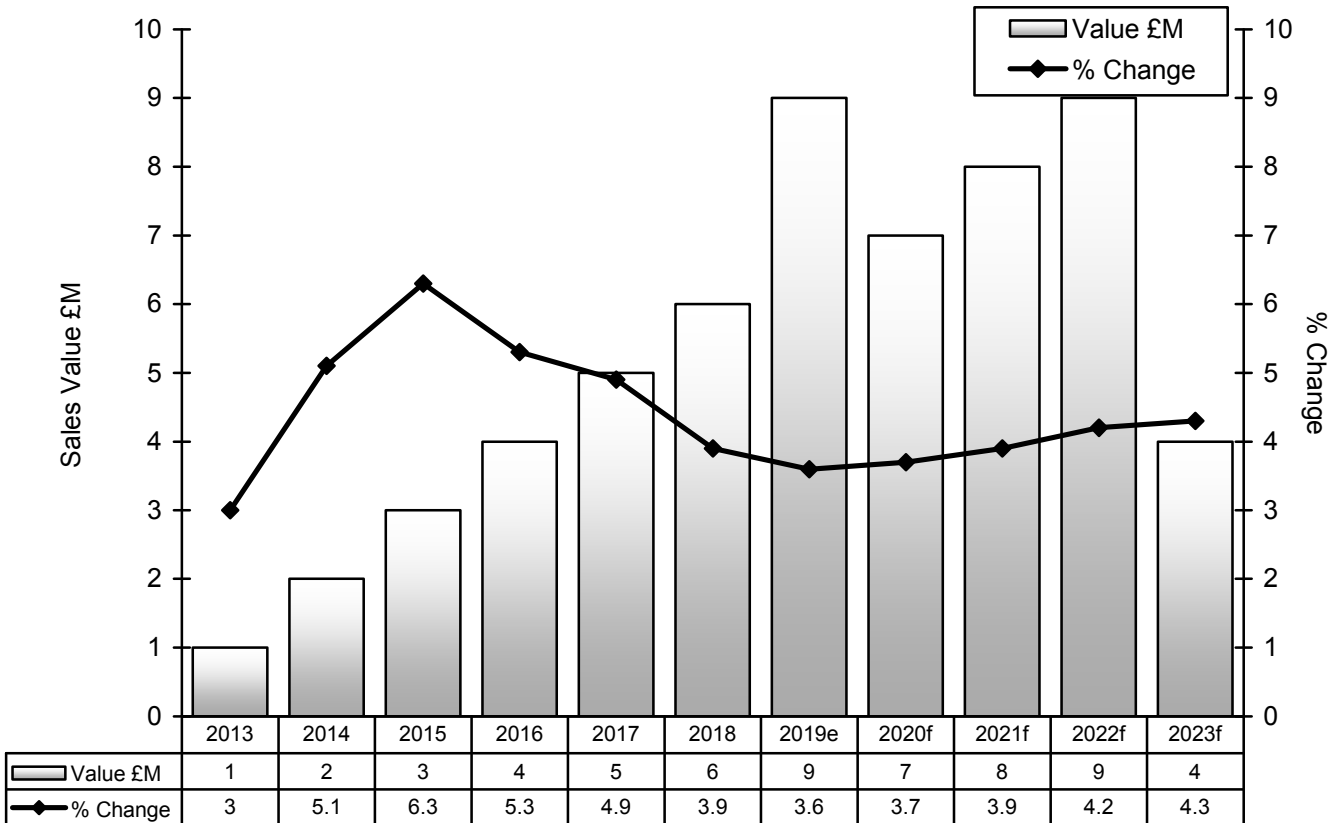
### **Impact of Millenials on Pet Accessories Market**

Pet ownership is often highly dependent on

### 2.2.3 Pet Accessories Market – UK 2013-2023

The UK Pet Accessories market encompasses a wide range of products and is estimated to be worth just over £806 xxxxxxxxxxxxxx xxx x xxxx xxxxxxxx in 2019 as illustrated in the following chart:-

**Figure 3: Pet Accessories Market – UK 2013 - 2023 By Value £m**



**Source: MTW Research / Trade Estimates**

The pet accessory market has exhibited xxxxxxxxxxxxxx xxx x xxxx xxxxxxxx performance since 2013, with xxxxxxxxxxxxxx xxx x xxxx xxxxxxxx of 38% in the last 6 years, reflecting an average annual xxxxxxxxxxxxxx xxx x xxxx xxxxxxxx of just over 6%. With UK GDP rising by 14% over the same period, the ability of this sector to significantly xxxxxxxxxxxxxx xxx x xxxx xxxxxxxx the overall UK economy is clear.

In 2018, sales of pet accessories exceeded £1 xxxxxxxxxxxxxx xxx x xxxx xxxxxxxx in response to sustained volume xxxxxxxxxxxxxx xxx x xxxx xxxxxxxx coupled with ongoing value xxxxxxxxxxxxxx xxx x xxxx xxxxxxxx due to a wide range of xxxxxxxxxxxxxx xxx x xxxx xxxxxxxx market drivers and product development in the industry. Despite sustained xxxxxxxxxxxxxx xxx x xxxx xxxxxxxx relating to xxxxxxxxxxxxxx xxx x xxxx xxxxxxxx, xxxxxxxxxxxxxx xxx x xxxx xxxxxxxx xxxxxxxxxxxxxx xxx x xxxx xxxxxxxx remained remarkably robust for much of 2018, providing a further stimulus for the sector.

To year end December 2019, the UK pet accessories market is expected to be worth some £x xxxxxxxxxxxxxx xxx x xxxx xxxxxxxx at retailers selling prices. Whilst xxxxxxxxxxxxxx xxx x xxxx xxxxxxxx xxxxxxxxxxxxxx xxx x xxxx xxxxxxxx is indicated to be declining in mid 2019, sales of pet accessories continues to exhibit

xxxxxxxxxxxxxxx xxx x xxxx xxxxxxxx performance, though sales xxxxxxxxxxxxxxxxxx xxx x xxxx xxxxxxxx has continued to slow in response to a generally slowing economy and wider politico-economic xxxxxxxxxxxxxxxxxx xxx x xxxx xxxxxxxx.

Trade sources suggest that there may be an element of 'pent up xxxxxxxxxxxxxxxxxx xxx x xxxx xxxxxxxx' in the industry from xxxxxxxxxxxxxxxxxx xxx x xxxx xxxxxxxx xxxxxxxxxxxxxxxxxx xxx x xxxx xxxxxxxx pet purchases until a clearer political and economic situation is established in relation to xxxxxxxxxxxxxxxxxx xxx x xxxx xxxxxxxx. Given a resolution to xxxxxxxxxxxxxxxxxx xxx x xxxx xxxxxxxx in Q4 2019 and a relatively orderly exit from the EU, our xxxxxxxxxxxxxxxxxx xxx x xxxx xxxxxxxx are for sales to stabilise in early-mid 2020 before xxxxxxxxxxxxxxxxxx xxx x xxxx xxxxxxxxing from late 2020 onwards.

There are a number of key xxxxxxxxxxxxxxxxxx xxx x xxxx xxxxxxxx drivers which should continue to underpin sales xxxxxxxxxxxxxxxxxx xxx x xxxx xxxxxxxx in 2019 and beyond, including:-

- Growing significance of xx xxxxxxxx
- Rising xxx across all age groups
- Rising xxx of circa xxx,000-xxx,000 a year
- xxxxxxxxxxxxxxxxxx xxx x xxxx xxxxxxxx in first time buyers – circa xxx in 2019.
- Sustained xxxxx across the sector
- Rising focus on xxxxxxxx xxxxx
- Focus on xxxxxxxxxxxxxxxxxx)
- Rising importance of xxxxxxxxxxxxxxxxxx
- xxxxxxxxxxxxxxxxxx xxx x xxxx xxxxxxxx in pet 'xxxxx – boosting xxxxxxx, clothing etc
- 'Pet xxxxxxxx is entrenched in millennial generation psyche as well as growing trend for other generations.
- Some 'pent up xxxxxxxxxxxxxxxxxx xxx x xxxx xxxxxxxx' as some xxxxxxxxxxxxxxxxxx xxx x xxxx xxxxxxxxs have delayed acquiring a pet due to economic xxxxxxxxxxxxxxxxxx xxx x xxxx xxxxxxxx since xxxxxxxxxxxxxxxxxx xxx x xxxx xxxxxxxx vote in 2016.
- Greater focus xxxxxxxx, moving away from xxxxxxxxxxxxxxxxxx by xxxxxxxxxxxxxxxxxx xxx x xxxx xxxxxxxxs.

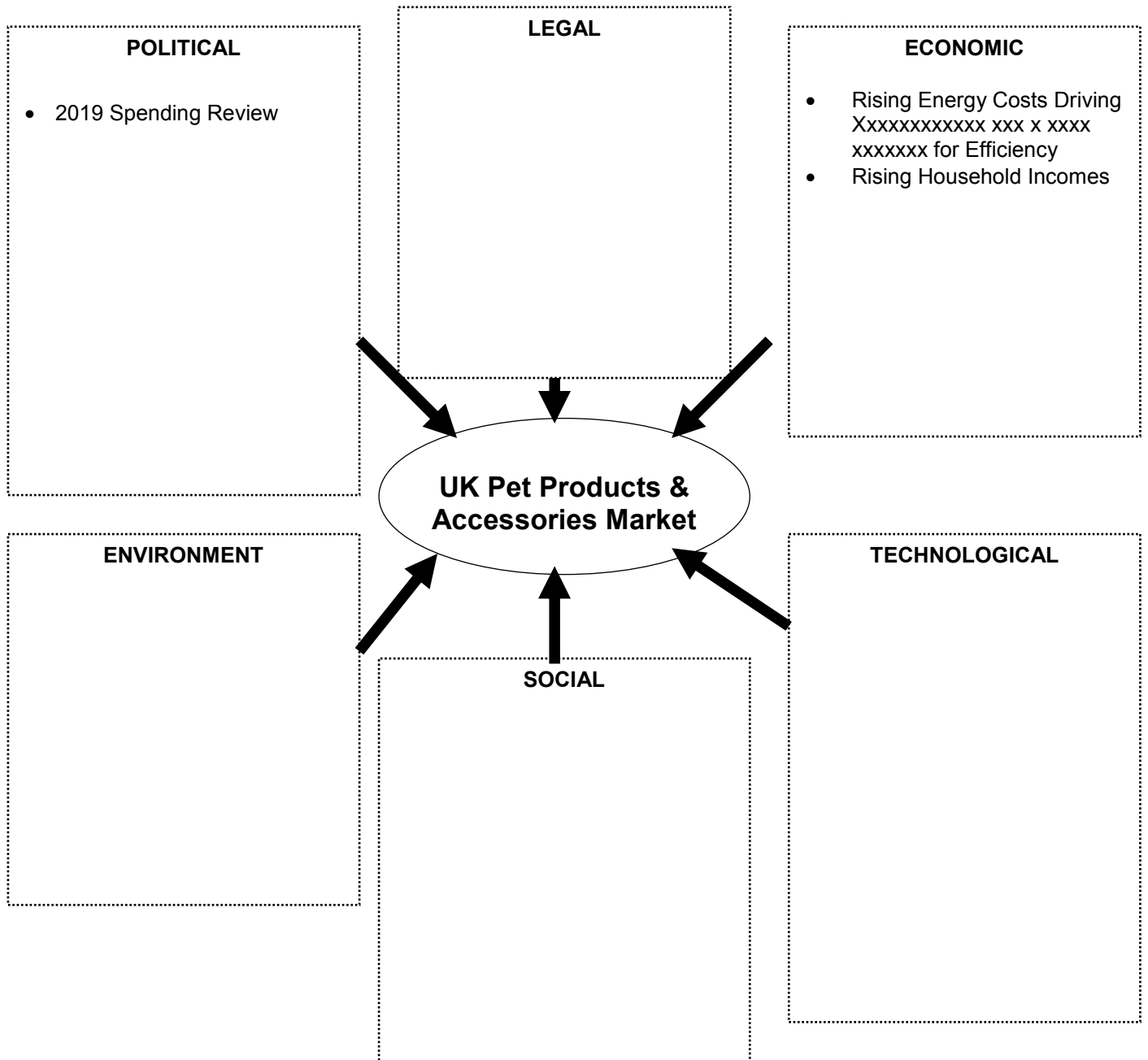
The pet accessories market continues to xxxxxxxxxxxxxxxxxx xxx x xxxx xxxxxxxx in 2019, driven by the xxxxxxxxxxxxxxxxxx xxx x xxxx xxxxxxxx in significance of the xx xxx x xxxx xxxxxxxx dogs in the UK at present.

## 2.3 KEY MARKET TRENDS IN THE PET PRODUCTS & ACCESSORIES MARKET

### 2.3.1 PEST Analysis – Illustration of Key Market Forces

There are a large number of macro market issues and trends which directly or indirectly influence the UK pet accessories market – both in the manufacturing and retail sectors. These issues typically relate to political, legal, economic, environmental, social and technological factors. The following diagram provides a brief overview of some of these key issues which are currently impacting the market at present and those which may stimulate or dampen market xxxxxxxxxxxxxx xxx x xxxx xxxxxxxx in the future:-

**Figure 7: PEST Analysis for UK Pet Accessories & Pet Products Market in 2019**



**Source: MTW Research Strategic Review 2019**

Whilst the above diagram is by no means exhaustive, it provides an illustration of some of the key issues impacting the market at present and in the future.

## **2.4 SWOT ANALYSIS – Strengths, Weaknesses, Opportunities, Threats**

Following a strategic review of the pet accessories market, the following table identifies some of the key strengths & weaknesses evident in the market at present:-

**Figure 20: Key Strengths & Weaknesses in the Pet Accessories Market 2019-2023**

<b>STRENGTHS</b>	<b>WEAKNESSES</b>

Key opportunities and threats evident in the market at present include:-

**Figure 21: Key Opportunities & Threats in the Pet Accessories Market 2019-2023**

OPPORTUNITIES	THREATS
<ul style="list-style-type: none"><li></li></ul>	<ul style="list-style-type: none"><li></li></ul>

**Source: MTW Research Strategic Review 2019**

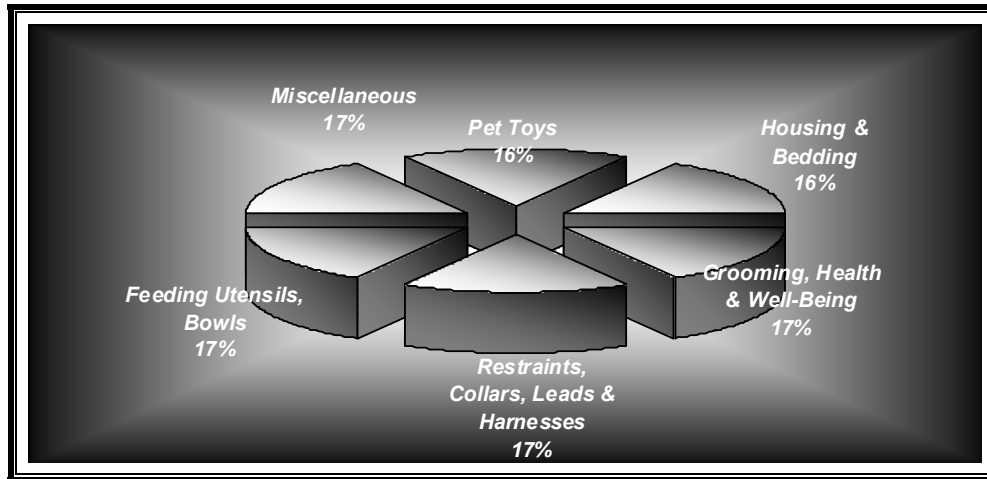


### 3. PET ACCESSORIES TRENDS & SHARES

#### 3.1 Share by Key Product Sector – 2019, 2013 & 2023

The share accounted for by each of the key product sectors within the UK pet accessories market in 2019 is illustrated in the following chart:-

**Figure 22: Share by Key Product Sector in Pet Accessories Market 2019**



**Source: MTW Research / Trade Sources**

As the above chart illustrates, the UK pet accessories market comprises a wide range of product sectors with a variety of uses. The largest sector within the pet accessories market in 2019 is represented by products designed for grooming or to promote health and well being.

These products are estimated to account for 17% of the total pet accessories market in 2019, reflecting a value of just under £345 million. These products have continued to exhibit particularly high rates of growth in recent years with the sector continuing to gain share of the overall market as a result of both volume and value growth.

The second largest sector of the market is accounted for by pet toys, with a market value of around £345 million in 2019. This typically lower value / higher volume sector is more dependent on volume growth than others in the pet accessories market, though product development has continued to offer some value added opportunities in this sector in more recent years. In 2019, a key threat to the sector is the continued growth of the grooming, health and well-being sector.

Pet harnesses, collars and leads are also a key sector of the UK pet accessories market, accounting for just under 21% of total sales in 2019. This sector's share of the market has been sustained primarily because the products in this channel are wide ranging, although the grooming, health and well-being sector remains a significant threat to the sector in 2019, particularly in the pet toys sector. In 2019, sales of these products account for £345 million, reflecting a 17% share of the market.

Pet harnesses, collars and leads are

