

Petcare - UK - July 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“Pets are ‘people’ too, in the eyes of most pet owners. And, just like treasured members of the family, pets are indulged with toys, stylish accessories and good quality petcare products. This ‘humanisation’ trend even stretches to pets being given their own Christmas and birthday gifts.”

Jane Westgarth, Senior Retail Analyst

This report looks at the following areas:

- **Subscription services for pet accessories are set to grow**
- **Is Pets at Home reaching maturity in the UK?**
- **Value retailers are taking petcare seriously**

This Report focuses on pet accessories and healthcare for cats and dogs, small mammals, fish and birds. Pet accessories are products that are either worn by, played with, treated on or used on pets which are not physically consumed by the pet itself. Pet accessories also include animal health and hygiene products.

**BUY THIS
REPORT NOW**

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

China
+86 (21) 6032 7300

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

Petcare - UK - July 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

What you need to know
 Products covered in this Report

Executive Summary

The market

Steady growth of spending predicted for petcare

Figure 1: Consumer spending on petcare, 2014-24

Diverse market with a wide range of products

Figure 2: Consumer spending on petcare, by segment, 2019 (est)

Companies and brands

Wide range of retailers in the petcare market

Figure 3: Distribution of pet accessories, by retailer, 2013 and 2019 (est)

Developments in online selling

Subscription services expand

Pet services continue to grow in importance for retailers

The consumer

51% of pet owners bought toys for their pets in the last 12 months

Figure 4: Petcare and accessories purchased in the last 12 months, May 2019

28% of purchasers spent over £20 on accessories in the last month

Figure 5: Spend on pet accessories, by spending band, May 2019

Eight in ten bought in-store

Figure 6: In-store or online purchasing for pet accessories, May 2019

In-store shoppers

Pets at Home stores were used by 47% of accessory purchasers

Figure 7: In-store retailers used for pet accessories, May 2019

Amazon tops the list of online retailers used for pet accessories

Figure 8: Online retailers used for pet accessories, May 2019

Shoppers are influenced by loyalty schemes and expertise

Figure 9: Factors influencing choice of retailer, May 2019

Pets are people too

Figure 10: Attitudes regarding pet accessories, May 2019

Four main customer groups

Figure 11: Target customers for petcare, May 2019

What we think

Issues and Insights

Subscription services for pet accessories are set to grow

BUY THIS
 REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Petcare - UK - July 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

The facts

The implications

Is Pets at Home reaching maturity in the UK?

The facts

The implications

Value retailers are taking petcare seriously

The facts

The implications

The Market – What You Need to Know

Increasing numbers of pets and 'humanisation' help market growth

15% growth predicted during 2019-24

Diverse market with a broad product range

12.6 million households have pets

Diverse range of retailers in the petcare market

Market Size and Forecast

More pets and greater added-value boost spending on petcare

Steady growth of spending predicted for petcare

Figure 12: Consumer spending on petcare, 2014-24

Most growth will be due to inflation

Figure 13: Consumer spend on petcare, at current and constant 2019 prices, 2014-24

Forecast methodology

Market Segmentation

Diverse market with a wide range of products

Figure 14: Consumer spending on petcare, by segment, 2019 (est)

Bigger sizes and style innovation for pet beds and cages

Figure 15: Market for pet beds and housing, by segment, 2019 (est)

Innovative products and automation are growing share of pet feeding

Cat litter is no longer a basic product

Figure 16: Market for pet sundries, by segment, 2019 (est)

Style innovations for clothes, collars, leads and harnesses

Figure 17: Market for apparel, collars and leads, by segment, 2019 (est)

Pet toys at pocket money prices

Mental stimulation and training aids are in demand

Cat scratching posts enjoy style innovation

Figure 18: Market for dog and cat toys, by segment, 2019 (est)

More design and lighting for aquariums

Pet health

Flea and worm treatments boosted by OTC products

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Petcare - UK - July 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Encouraging daily dental care

Supplements market is worth £46 million

Toiletries

Figure 19: Market for pet healthcare, by segment, 2019 (est)

Channels to Market

Diverse range of retailers in the petcare market

Online selling is growing in importance

Figure 20: Distribution of pet accessories, by retailer, 2013 and 2019 (est)

Market Drivers

12.6 million households have pets

Figure 21: Estimated number of pets by type, 2018

39% of dog owners also have cat(s)

Figure 22: Estimated percentage of households with pets, 2014-18

Fewer private rented households own pets

Figure 23: Pet ownership, by household tenure, May 2018

Pets are part of the family

Other market drivers

Companies and Brands – What You Need to Know

Pets at Home is the largest specialist in the UK pet retail sector

Online-only pet specialists have patchy results

Concentration among specialist retailers

Developments in online selling

Subscription services expand

Pet services continue to grow in importance for retailers

Elevating the experience in-store

Companies and Brands

Retail companies

Pets at Home is the largest specialist in the UK pet retail sector

Figure 24: Pet retailers, turnover, 2013-18

Just for Pets bought out of administration

Many in the sector struggling to make enough profit

Figure 25: Pet retailers, operating profit, 2013-18

Pets at Home generates the highest operating margin

Figure 26: Pet retailers, operating margin, 2013-18

Pets at Home has three times as many stores as its nearest rival

Figure 27: Pet retailers, store numbers, 2013-18

Turnover per store

Figure 28: Pet retailers, sales per store, 2013-18

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Petcare - UK - July 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Suppliers and brands

Wide range of brands and suppliers

Healthcare brands

Figure 29: Examples of healthcare companies and brands, 2019

Brands of pet products

Figure 30: Examples of pet product brands, 2019

Competitive Strategies

Concentration among specialist retailers

Developments in online selling

Subscription services expand

Figure 31: Protectmypet, subscription image, 2019

Loyalty schemes

Pet services continue to grow in importance for retailers

Elevating the experience in-store

Figure 32: Pets corner, puppy hour, 2019

Launch Activity and Innovation

Retail innovation

Voice controlled ordering will help fuel online shopping

Enhancing the in-store experience

Figure 33: Pets at home, store of the future, 2019

BarkBox subscriptions via Amazon in the US

IKEA's Pet Furniture Range

Figure 34: IKEA, Lurvig pet furniture range, 2019

Premium pet store in Chelsea

Figure 35: Charity fashion show by Love My Human, 2018

Product innovation

Matching jumpers for dogs and owners

Figure 36: Matching jumpers for dogs and owners, 2019

Pooch power shovel

Figure 37: Pooch power shovel, 2019

Fitbark can chart owner and dog activity, side-by-side

Figure 38: Charting pet activity, Fitbark, 2019

Pet doors and feeders controlled via an app

Figure 39: Sure Petcare, pet door and feeder controlled via an app, 2019

A calming space for anxious animals

Figure 40: Zencrate, 2019

Cannabis derived petcare

Advertising and Marketing Activity

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Petcare - UK - July 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

18% increase in adspend during 2014-18

Figure 41: Total above-the-line, online display and direct mail advertising expenditure on petcare, 2014-18

Ceva Animal Health is the largest advertiser

Figure 42: Share of main monitored advertising spend on petcare, by advertiser, top ten, 2014-18

TV accounts for two thirds of advertising spend

Figure 43: Main monitored advertising spend on petcare, by media type, 2018

Nielsen Ad Intel coverage

The Consumer – What You Need to Know

87% of pet owners bought petcare products in the last year

Widespread of purchasing on petcare

81% bought in-store, 45% bought online

Pets at Home is widely used

Amazon dominates online retailing for petcare

Loyalty schemes attract shoppers

People want specialists

Pets 'appreciate' being bought new things

Four main target groups

Purchases of Pet Accessories

51% of pet owners bought toys for their pets in the last 12 months

Figure 44: Petcare and accessories purchased in the last 12 months, May 2019

Spend on Pet Accessories

Dog owners are higher spenders

Figure 45: Spend on pet accessories, by spending band, May 2019

In-store or Online Shopping

Online shopping is widespread

Figure 46: In-store or online purchasing for pet accessories, May 2019

Retailers Used for Pet Accessories

In-store shoppers

The power of the supermarkets

Figure 47: In-store retailers used for pet accessories, May 2019

Online retailers used for pet accessories

Amazon is the most-used online retailer

Pureplay pet websites

Figure 48: Online retailers used for pet accessories, May 2019

Factors Influencing Choice of Retailer

Loyalty schemes attract shoppers

People want specialists

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Petcare - UK - July 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

24% say being able to buy online is a key factor influencing them

Bonding with an independent

Figure 49: Factors influencing choice of retailer, May 2019

Attitudes Regarding Pet Accessories

Figure 50: Attitudes regarding pet accessories, May 2019

Customer Typologies

Four main target groups

Figure 51: Target customers for petcare, May 2019

Affluent Pet Families (34%)

Pet Lovers (29%)

Silver Pet Owners (22%)

Indifferent Pet Owners (15%)

Figure 52: Target customers for petcare, by attitudes to petcare, May 2019

Figure 53: Petcare and accessories purchased in the last 12 months, by May 2019

Where they shop for pet products in-store

Figure 54: In-store retailers used for pet accessories, May 2019

Where they shop online for pet products

Figure 55: Online retailers used for pet accessories, May 2019

Affluent Families are influenced by additional services

Figure 56: Factors influencing choice of retailer, May 2019

Appendix – Data Sources, Abbreviations and Supporting Information

Abbreviations

Consumer research methodology

Appendix – Market Size and Forecast

Forecast methodology

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com