2002-2003 PET AGE RETAILER REPORT

To cope with economic and competitive pressures, specialty pet retailers have improved operating efficiencies and cut costs. But their worries may not be over. By Joe Fucini and Karen Long MacLeod

You probably don't need any more reminders that times are tough. Your average customer ticket is smaller. Your margins are slimmer. Your ad budget is tighter. Categories that used to be cash cows—including pets—are showing signs of weakness. You've got your hands full just trying to make ends meet.

Still, as old Joe Kennedy once said, "When the going gets tough, the tough get going."

And specialty pet retailers are doing just that, according to the 2002-2003 PET AGE Retailer Survey.

Despite the challenges, most pet retailers participating in our annual survey improved overall gross dollar volume and net profits from 2000 to 2001, the timeframe respondents were questioned about. Four out of 10 respondents (40 percent) said dollar volume for dry goods and animals rose 10 percent or more. Three out of 10 respondents (32 percent) said net profits rose 10 percent or more.

Another good sign: The dog and cat categories made stronger showings. After dwindling steadily for five years, dog food and cat food rebounded in terms of their share of dollar volume per store. In addition, "dog food and supplies" was cited as one of the fastest-growing product categories. Clearly, specialty pet stores continue to draw pet food shoppers despite the availability of premium pet foods (notably, Iams) in mass-market outlets.

In addition, more than half of all survey respondents (55 percent) said they plan to expand or improve their facilities within the next two years, and one in three respondents (34 percent) planned to add at least one ancillary service.

Out of 268 pet retailers participating in this year's survey, 93 percent represented independent pet supply outlets and 7 percent represented franchise and/or chain pet supply outlets. This mix is virtually identical to that of the previous year's survey.

Here's a closer look at the findings from the 2002-2003 Pet Age Retailer Survey.

*Pet stores grossed an average of **$794,756** in 2001. Almost half grossed $100,000 to $499,999.*

Financial Ups and Downs

Faced with mounting competitive pressures and a general economic downturn, specialty pet retailers struggled to make ends meet in 2001. According to our survey, the average gross dollar volume for pet stores was $794,756—12 percent less than the 2000 average of $906,701. (However, retailers from rural areas and small towns represented a slightly higher proportion of respondents in this year's survey.)

DON BISHOP/ARTVILLE L.L.C.

FROM THE TRENCHES ...

"The economy is definitely hurting pet supply sales. I think the downturn will probably last about four years, because it's taken that long to get to where we are, so I don't expect things to bounce back overnight.

"From a profit standpoint, specialty stores have really been hurt by mass merchandisers. I wouldn't be surprised if margins continue to fall. The only thing that can help specialty retailers maintain profits is educating the public about the value of shopping at a pet store. After all, we're the ones who taught them how to keep fish alive. ...

"Specialty pet stores are also going to have to continue to get more heavily into services, because that's one area where they can make a buck, where Wal-Mart can't. I think you'll see a lot more retailers getting into aquarium maintenance and dog grooming in particular. ...

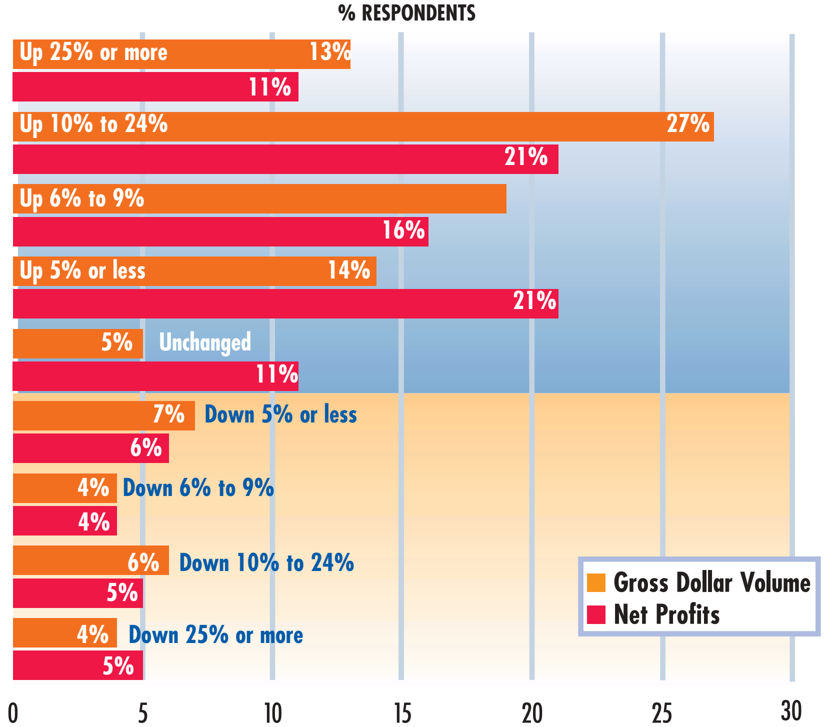
"We haven't seen any softening in the livestock market. In fact, that's one really bright spot for us. For whatever reason, it seems that more and more people are getting into pets."

Bill Vagott, Owner
Kiraly's Pet
Whitesboro, N.Y.

Pet stores spent an average of **$34,364** *on advertising in 2001.*

DOLLAR VOLUME & PROFITS, 2001 VS. 2000

Despite the economic downturn, most pet retailers saw improvements in both overall gross dollar volume and net profits in 2001 versus the year before.



SIGNS OF (HARD) TIMES

Specialty pet retailers felt the sting of competitive pressures and a tough economic climate in 2001.

	2001	2000
Average gross dollar volume	$794,756	$906,701
Average customer transaction	$46.77	$47.50
Retailers reporting gross volume increase	73%	74%
Retailers reporting gross volume decrease	21%	18%
Retailers reporting net profit increase	69%	65%
Retailers reporting net profit decrease	20%	26%

It didn't help that pet owners spent less every time they visited a pet store. The average customer transaction dipped 73 cents, from $47.50 to $46.77. Of course, rising unemployment rates and falling stock values had forced consumers to put the brakes on spending even before the terrorist attacks occurred on Sept. 11, 2001.

Another factor that hurt store sales was a significant dip in margins. The average markup on dry goods was 62 percent, down from 68 percent the previous year. Dragging down the overall average were lower markups in all dry goods categories—except fish food and supplies.

Markups for fish food and supplies may have risen, but that category lost more ground than any other in terms of its share of dollar volume per store. This may indicate that it's time for retailers to rethink pricing strategies for aquarium supplies.

Even as average markups declined, average inventory turns for dry goods rebounded. Pet stores averaged 10.78 turns in 2001, versus 7.96 turns in 2000 and 9.4 turns in 1999. This indicates that pet retailers are buying smarter, maintaining leaner inventories with greater customer appeal, and aggressively clearing out slow-moving merchandise.

These factors may account for the finding that *three times* as many retailers reported increases in dollar volume and net profits as those reporting declines in the same areas. In addition, more survey respondents said their net profits increased year over year (69 percent, versus 65 percent a year ago), and fewer said their net profit decreased (20 percent, versus 26 percent a year ago).

Belt-Tightening Strategies

To cope with pressing financial challenges, pet retailers adopted a variety of belt-tightening strategies in 2001: curbing advertising budgets, making staff cutbacks and limiting wage increases.

When times are tough, business owners often look to their advertising and marketing budgets to make the first cuts. This certainly was the case for pet retailers in 2001: At $34,364, their average advertising expenditure was more than $1,200 below their average expenditure the year before.

Once again, pet retailers listed newspapers and shoppers as the most effective form of advertising. Direct mail remained in second place, ahead of telephone directories.

Pet retailers handled the workload with an average of two fewer people per store in 2001. Survey respondents employed an average of 4.1 full-time employees and 4.2 part-time employees, versus 5.2 full-time and 5.6 part-time employees in 2000.

What's more, pet retailers kept payroll in check in 2001. According to our survey, the average wage for full-time employees dropped nearly 70 cents per hour. The average wage for part-time employees fell more than 10 cents per hour.

Another indication that retailers are running leaner operations was a substantial drop in the percentage of

WHERE PET STORES MAKE THEIR MONEY

In terms of average share of dollar volume per store, services and bird supplies showed the biggest gains and aquarium supplies showed the biggest losses.

	2001	2000
All animals & livestock	17%	19%
Dog supplies & accessories	13%	11%
Fish food & aquarium supplies	13%	17%
Services	13%	10%
Dog food	11%	9%
Bird food & supplies	10%	7%
Cat food	5%	4%
Cat supplies & accessories	5%	5%
Small-animal food & supplies	5%	7%
Reptile food & supplies	4%	4%
Other	4%	5%

LOWER MARKUPS, MORE TURNS

Lower markups in all dry goods categories—except fish food and supplies—dragged down the overall average markup. However, quicker inventory turns probably helped retailers in 2001.

	AVERAGE MARKUPS 2001	AVERAGE MARKUPS 2000	AVERAGE TURNS 2001	AVERAGE TURNS 2000
All dry goods	62%	68%	10.8	8.0
Dog food	25%	26%	14.3	14.8
Cat food	24%	28%	12.8	12.8
Fish food & supplies	82%	80%	10.8	11.1
Bird food & supplies	70%	88%	11.3	11.0
Small-animal food & supplies	73%	84%	11.6	10.3
Reptile food & supplies	84%	87%	10.8	6.8
Livestock	97%	112%	—	—

"As an aquarium specialty store, we did not experience a downturn—our sales were up modestly. The dry goods area was stable for most of the year and has picked up a little in the last few months, while our livestock business has been up all year. What this tells me is that people may not be able to afford to buy a new filter or lots of plastic plants, but they will buy the food they need and a new fish or two.

"Our profit margins on livestock were up, too. I think one of the reasons that our business and profits have continued to grow in this economy is that we're willing to make changes. We're constantly tweaking and face-lifting our store, even if it's just changing the front room around. But if people come in and see the same old fish in the same old tank and walk through the same dry goods room with no changes, they'll walk out without buying anything, because nothing catches their eye.

"The stores that will continue to perform well in this economy are the ones who are willing to evolve and change. I've been in business for 12 years, and I can say that the pet industry can outlast a lot of recessions. ... People will always spend a little money on an escape."

Bruce Longwell, Owner
The Fish Connection
Durango, Colo.

"The aquarium market has been declining. Some of it is due to the economy, but a lot of it is because people are buying their supplies from Internet companies and even getting more of their aquarium equipment on E-bay. ...

"Even though sales have been off, we haven't cut back in our staff size or employee wages and benefits. Our corporate office is actually offering more benefits. Making cutbacks in these areas may make the numbers look good in the short term, but in the long run it tends to hurt retailers. When you cut back and have fewer and less-qualified employees, customers don't get serviced as well. And service is the main thing that gives specialty stores their edge over the mass merchants."

Jim Augustine, Manager
Jack's Aquarium & Pets
Dayton, Ohio

respondents who said they offered employee benefits. Whereas 75 percent of pet retailers provided any kind of employee benefits in 2000, only 69 percent of retailers provided employee benefits in 2001.

Cost-cutting measures, in addition to improved inventory control, may explain why a majority of survey respondents were able to report increases in net profits from 2000 to 2001 even though dollar volumes and retail margins declined.

However, these short-term solutions could easily hurt pet stores in the long run. When they cut marketing budgets, businesses often curtail the activities that would bring in new customers—and end up losing market share as well as customer loyalty. Furthermore, when they reduce wages, businesses often

EMPLOYEE BENEFITS

Nearly 70% of respondents provided any kind of employee benefits in 2001, versus 75% of respondents in 2000.

%RESPONDENTS	2001	2000
Paid vacation	51%	46%
Health insurance	34%	28%
Sick/personal days	28%	26%
Profit sharing	13%	8%
Disability insurance	12%	10%
Life insurance	10%	6%
Pension plan	10%	7%
Other	16%	18%
None	38%	26%

Totals add up to more than 100% because multiple responses were allowed

SERVICES RETAILERS PLAN TO ADD

Showing the growing profit-making potential of ancillary services, one in three pet retailers plan to add at least one service within the next two years.

	2001	2000
Aquarium/pond installation or maintenance	24%	21%
Obedience training	16%	12%
Grooming	11%	15%
Boarding/day care	5%	7%
Delivery	5%	—

BELT-TIGHTENING STRATEGIES

To offset slower sales and weaker margins, pet retailers cut their advertising budgets, made staff cutbacks and limited wage increases.

	2001	2000
➤ Average number of full-time employees	4.1	5.2
➤ Average number of part-time employees	4.2	5.6
➤ Average pay for full-time employees	$8.70/hour	$9.39/hour
➤ Average pay for part-time employees	$6.90/hour	$7.03/hour
➤ Average advertising expenditures	$34,364	$35,594

PLANS TO EXPAND

Even though they are keeping a close eye on operating expenses, more pet retailers plan to make major capital improvements within the next two years.

	2001	2000
➤ Retailers planning major expansions or improvements	55%	40%
Build onto current facility	20%	34%
Remodel current facility	59%	75%
Buy additional business	16%	18%
Build new building or move to new location	11%	—
➤ Retailers planning to spend more than $20,000 on project	32%	35%

Totals add up to more than 100% because multiple responses were allowed.

On average, pet stores have **3,977** *square feet of retail space. Almost half have 2,000 to 5,999 square feet.*

FROM THE TRENCHES …

"Larger ticket sales have been most affected by the economy. People are holding back on purchasing that new cat scratching tree or reptile setup, but they're still buying day-to-day items like dog treats and fish food. We've actually seen some steady growth this year, and I think it's because we've refocused our marketing and in-store merchandising to emphasize the types of things that people are buying in this economy. …

"I would definitely agree with the view that dog and cat food sales are making a rebound at specialty stores. I think it's because: 1.) Some of the existing specialty-store-only brands have gotten stronger and, 2.) food manufacturers have come out with new, innovative products such as dental-care and skin-and-coat formulas. If they're marketed aggressively, they provide a great opportunity for pet retailers to reclaim their share of the food business. …

"One thing that's hurting the livestock market are the tougher new laws and regulations that have been implemented in many areas. … But you have to remember that there is no pet industry without livestock—and no independent specialty retailers without livestock. The people who fight through the regulations and continue to carry livestock are going to benefit."

Mark Rose, President
Pet Adventure
Valencia, Calif.

have trouble retaining better-qualified or more experienced employees—and customer service suffers.

Expansion Plans

Even as they reined in expenses, 55 percent of survey respondents reported plans to make capital improvements within the next two years. This represents a significant increase from last year's survey, when 40 percent of respondents cited plans to expand or improve their facilities. Apparently, many retailers feel optimistic about the future of the economy in general and their businesses in particular.

Another forward-looking sign: One in three pet retailers (34 percent) cited plans to add at least one ancillary service within the next two years. Topping the list of potential services was aquarium/pond installation and maintenance.

This focus on ancillary services should come as no surprise given their increasing importance to specialty pet stores. Services such as aquarium maintenance, grooming and boarding represented 13 percent of retailers' overall dollar volume in 2001, up from 10 percent in 2000. This is a continuation of an upward trend that began in 1997, when services represented only 3 percent of retailers' dollar volume.

Animal Alert

The animals category remained No. 1 in terms of its contribution to gross dollar volume, but even this perennially strong category showed signs of weakness in 2001.

Animals represented 17 percent of dollar volume per store in 2001, down from 19 percent of dollar volume in 2000, according to our survey.

TOP PET CATEGORIES

Although the No. 1 contributor to dollar volume, the animals category showed signs of weakness in 2001.

% STORES CARRYING CATEGORY	2001	2000
Freshwater fish	61%	69%
Birds	57%	63%
Small animals	53%	63%
Reptiles	50%	59%
Saltwater fish	35%	46%
Mixed-breed kittens	23%	37%
AKC puppies	18%	22%
Mixed-breed puppies	17%	22%
CFA kittens	11%	14%
None	27%	31%

REASONS TO SELL OUT

One out of five respondents plan to sell their business within the next two years.

	2001	2000
Lack of profitability	21%	20%
Health/burnout	12%	13%
Retirement	12%	3%
Personal/family	3%	—
Employee problems	2%	3%

FASTEST-GROWING PRODUCT CATEGORIES

"Dog food & supplies" showed new strength, tying with "Fish food & aquarium supplies" as fastest-growing category.

2001	% RESPONDENTS	2000	% RESPONDENTS
Dog food & supplies	14%	Fish food & aquarium supplies	18%
Fish food & aquarium supplies	14%	Dog food & supplies	15%
Bird food & supplies	7%	Reptile food & supplies	11%
Small animals	5%	Bird food & supplies	9%
Holistic/natural products	5%	Small-animal food & supplies	9%
Birds	4%	Pets & livestock	6%
Dog treats	4%	Pond supplies	6%
Fish	4%	Cat food & supplies	4%
Pond supplies	4%	Holistic/natural products	4%
Reptiles	4%	Toys	4%

"We haven't experienced any softening of the livestock market, saleswise or profitwise. The biggest share of our business is puppy sales, and the puppy market is very strong. In fact, we're selling more puppies than we did last year. We're also making a higher profit on puppies. We actually raised our prices, because everybody around us—including the very big pet stores—were selling puppies for more than we were.

"Dry goods are a different story. We've got a Wal-Mart on either side of us and this has hurt both sales and profitability in the dry goods end, as I'm sure it has for many specialty retailers. However, I don't think you'll continue to see margins fall on dry goods. I think the situation with the mass merchandisers has reached the point where it's finally leveling out."

Dorothy Garwick, President
Garwick's the Pet People
Mendon, Ohio

MIXED MENU: SOME FOOD SALES WERE UP, SOME WERE DOWN

The exodus of customers—especially dog and cat owners—to mass merchants seems to have halted.

	2001			2000		
	UP	UNCHANGED	DOWN	UP	UNCHANGED	DOWN
Dog food	51%	26%	23%	51%	15%	33%
Cat food	44%	30%	27%	46%	29%	25%
Fish food & aquarium supplies	63%	23%	15%	69%	18%	13%
Bird food & supplies	58%	24%	18%	57%	32%	12%
Small-animal food & supplies	61%	22%	18%	54%	32%	14%
Reptile food & supplies	44%	36%	21%	48%	34%	18%

TOP CHALLENGES FOR PET RETAILERS

2001	% RESPONDENTS	2000	% RESPONDENTS
Competition	33%	Competition	37%
Expanding business/building customer base	17%	Maintaining profits	13%
Maintaining profits	16%	Finding/retaining good employees	10%
Finding/retaining good employees	11%	Maintaining public interest in pets	8%
Increasing sales volume	10%	Expanding business	4%

In addition, the average markup on livestock dropped to 97 percent—having climbed from 98 percent in 1998, to 102 percent in 1999, to 112 percent in 2000.

More worrisome is the finding that significantly lower percentages of stores were carrying animals in every category. For example, 61 percent of respondents said they carried freshwater fish in 2001, down from 69 percent in 2000.

Dog Days

On a more positive note, dog food and cat food buyers seem to be shifting their allegiance away from supermarkets and mass outlets back to specialty pet stores. Ending a five-year downward trend, the dog food and cat food categories each gained more than one percentage point in terms of their share of sales per pet store. Dog food represented 11 percent of dollar volume and cat food represented 5 percent (versus 9 percent and 4 percent, respectively, the year before).

The dog supplies category represented 13 percent of dollar volume, an improvement over a low of 11 percent in 2000.

Yet another indication that dog owners are returning to specialty stores: "Dog food and supplies" tied with "fish food and aquarium supplies" as the fastest-growing product categories.

Bird food and supplies showed the biggest gain in dollar volume share in 2001, rebounding by nearly three percentage points. At the opposite end of the spectrum, fish food and supplies registered the biggest loss in dollar volume share, sinking four percentage points. **PA**

Joe Fucini is president of Fucini Productions Inc. (West Bloomfield, Mich.).

Karen Long MacLeod is editor in chief/associate publisher for PET AGE.

ABOUT THE SURVEY

Statistical data for "The 2002-2003 PET AGE Retailer Report" were compiled by Clientize.com (Boca Raton, Fla.), a firm that specializes in database marketing for publishers and marketers, and by PET AGE editors.

Clientize sent e-mails and faxes on Aug. 5, Aug. 20 and Sept. 9 inviting more than 6,500 pet supply outlets from the PET AGE subscriber list to complete our Internet-based questionnaire. Additionally, we publicized the questionnaire's availability via the "Editor's Note" and advertisements in PET AGE.

Retailers who didn't have access to the Internet or who preferred not to complete the survey online were faxed hard copies of the questionnaire.

The 2002-2003 PET AGE Retailer Survey drew 268 responses—20 percent more than last year's survey.

Percentages will not always total 100 because many responses were rounded, and not all respondents answered all questions.

The 2002-2003 PET AGE Retailer Survey was sponsored by All-Glass Aquarium Co. Inc. (Franklin, Wis.), Coastal Pet Products Inc. (Alliance, Ohio), Sun Seed Co. Inc. (Bowling Green, Ohio) and Virbac Corp. (Fort Worth, Texas).

FROM THE TRENCHES ...

"Several large companies in our area have laid people off, and this has definitely affected our business. We're not seeing the increases we'd like to, but we are managing to hold our own.

"In the dog and cat food categories, we've lost a lot of business to mass merchandisers, and we're not seeing any reversal of this trend. So our strategy for maintaining our volume has been to focus heavily on areas that require service and knowledge, such as fish and reptiles. The reptile category, in particular, has been a big growth area for us. We promote reptiles heavily, simply because they require specialized knowledge, which the customer can't find at a mass merchant. Specialty retailers need to find niches like this, where service and knowledge really make a difference. ...

"For this reason, we keep a lot of employees on the sales floor. Despite the poor economy, we haven't decreased our sales staff. We have 43 employees, and about 15 of them are full-time. They pay for themselves, because they're out there selling."

Sally Trufant,
General Manager
B&B Pet Stop
Mobile, Ala.

Pet store customers spend an average of **$46.77** *per visit.*

BRAND LEADERS

IN KEY PET SUPPLY CATEGORIES

	% Stores Citing Brand as No. 1
Aquariums	
1. All-Glass Aquarium Co. Inc.	57%
2. Perfecto Manufacturing Inc.	15%
Aquarium Cleaning Equipment	
1. Lee's Aquarium & Pet Products	39%
2. Rolf C. Hagen (USA) Corp.	12%
Aquarium Decorations	
1. Blue Ribbon Pet Products Inc.	28%
2. Penn-Plax Inc.	26%
Aquarium Filters	
1. Marineland Aquarium Products	33%
2. Tetra/Second nature	26%
Aquarium Health Aids	
1. Aquarium Pharmaceuticals Inc.	33%
2. Aquatronics/Filtronics	16%
Aquarium Heating Equipment	
1. Rolf C. Hagen (USA) Corp.	38%
2. Aquarium Systems Inc.	14%
Aquarium Lighting	
1. All-Glass Aquarium Co. Inc.	38%
2. Rolf C. Hagen (USA) Corp.	18%
Aquarium Meters	
1. Aquarium Systems Inc., Penn-Plax Inc. (tie)	16%
2. American Marine Inc., Rolf C. Hagen (USA) Corp., Milwaukee Instruments Inc. (tie)	11%
Aquarium Pumps	
1. Rolf C. Hagen (USA) Corp.	30%
2. Tetra/Second nature	23%
Aquarium Test Kits	
1. Aquarium Pharmaceuticals Inc.	45%
2. Tetra/Second nature	15%
Aquarium Water Conditioners	
1. Aquarium Pharmaceuticals Inc.	37%
2. Jungle Laboratories Inc.	13%
Fish Food	
1. Tetra/Second nature	44%
2. OmegaSea Ltd.	12%

	% Stores Citing Brand as No. 1
Pond Products	
1. Tetra/Second nature	30%
2. Rolf C. Hagen (USA) Corp.	28%
Bird Bedding & Litter	
1. Kaytee Products Inc.	28%
2. Hartz Mountain Corp.	21%
Bird Cages	
1. Prevue Pet Products	23%
2. YML Group Inc.	13%
Bird Cage Stands	
1. Prevue Pet Products	23%
2. YML Group Inc.	19%
Bird Feeding Equipment	
1. Penn-Plax Inc.	45%
2. Rolf C. Hagen (USA) Corp.	13%
Bird Food	
1. Sun Seed Co. Inc.	30%
2. Kaytee Products Inc.	24%
Bird Health Aids	
1. Virbac Corp.	36%
2. Eight in One Pet Products Inc.	28%
Bird Sanitation Products	
1. Rolf C. Hagen (USA) Corp.	13%
2. Eight in One Pet Products Inc.	10%
Bird Toys & Exercise Products	
1. Penn-Plax Inc.	32%
2. Rolf C. Hagen (USA) Corp.	20%
Bird Water Bottles	
1. Penn-Plax Inc.	24%
2. Lixit Corp.	19%
Cat Beds	
1. Flexi-Mat Corp.	20%
2. Lazy Pet Products	14%

Cat Collars & Leads	% Stores Citing Brand as No. 1
1. Coastal Pet Products Inc.	43%
2. Four Paws Products Ltd.	14%

Cat Feeding Equipment
1. Doskocil Manufacturing Co. Inc. 58%
2. Van Ness Plastics 17%

Cat Flea/Tick Products
1. Farnam Pet Products 46%
2. Wellmark International 17%

Cat Food
1. Hill's Pet Nutrition Inc. 27%
2. Nutro Products Inc. 22%

Cat Furniture
1. Anderson Pet Furniture 11%
2. Doskocil Manufacturing Co. Inc. 7%

Cat Grooming Tools
1. Four Paws Products Ltd. 37%
2. Safari by Coastal Pet Products Inc. 28%

Cat Health Products
1. Virbac Corp. 33%
2. Four Paws Products 30%

Cat Housing
1. Doskocil Manufacturing Co. Inc. 38%
2. Midwest Homes for Pets 13%

Cat Litter
1. American Colloid 22%
2. The Clorox Co. 18%

Cat Litter Accessories
1. Van Ness Plastics 42%
2. Doskocil Manufacturing Co. Inc. 40%

Cat Sanitation Products
1. Pets 'N People Inc. 48%
2. Four Paws Products 23%

Cat Shampoos
1. Four Paws Products 46%
2. Lambert Kay/Church & Dwight 10%

Cat Toys
1. Ethical Products Inc. 25%
2. Vo-Toys Inc. 15%

Cat Treats
1. Nestlé Purina PetCare Co. 25%
2. Cosmic Pet Products 19%

Dog Apparel
1. Ethical Products Inc. 27%
2. Doggiduds 16%

Dog Beds	% Stores Citing Brand as No. 1
1. Flexi-Mat Corp.	22%
2. Lazy Pet Products	10%

Dog Collars & Leads
1. Coastal Pet Products Inc. 38%
2. Four Paws Products Ltd. 13%

Dog Feeding Equipment
1. Doskocil Manufacturing Co. Inc. 45%
2. Van Ness Plastics 13%

Dog Flea/Tick Products
1. Farnam Pet Products 44%
2. Wellmark International 19%

Dog Food
1. Nutro Products Inc. 25%
2. The Iams Co. 19%

Dog Grooming Tools
1. Four Paws Products 41%
2. Safari by Coastal Pet Products Inc. 23%

Dog Health Products
1. Four Paws Products 31%
2. Virbac Corp. 23%

Dog Housing
1. Midwest Homes for Pets 35%
2. Doskocil Manufacturing Co. Inc. 28%

Dog Sanitation Products
1. Four Paws Products 48%
2. Pets 'N People Inc. 26%

Dog Shampoos
1. Four Paws Products 27%
2. Bio-Groom 13%

Dog Toys
1. The Kong Co. .27%
2. Ethical Products Inc. 12%

Dog Treats
1. S&M NuTec L.L.C. 13%
2. Old Mother Hubbard 12%

Reptile Bedding & Litter
1. Zoo Med Laboratories Inc. 39%
2. Energy Savers Unlimited Inc. 29%

Reptile Feeding Equipment
1. Zoo Med Laboratories Inc. 43%
2. Energy Savers Unlimited Inc. 11%

Reptile Food
1. Zoo Med Laboratories Inc. 30%
2. Tetra/Second nature 17%

Reptile Health Aids	% Stores Citing Brand as No. 1
1. Zoo Med Laboratories Inc.	24%
2. Energy Savers Unlimited Inc.	22%

Reptile Heating Equipment
1. Zoo Med Laboratories Inc. 39%
2. Four Paws Products 19%

Reptile Housing
1. All-Glass Aquarium Co. Inc. 59%
2. Perfecto Manufacturing Inc. 11%

Reptile Housing Decor
1. Zoo Med Laboratories Inc. 35%
2. Energy Savers Unlimited Inc. 13%

Reptile Lighting
1. Energy Savers Unlimited Inc. 46%
2. Zoo Med Laboratories Inc. 31%

Reptile Sanitation Products
1. Zoo Med Laboratories Inc. 41%
2. Energy Savers Unlimited Inc. 28%

Small-Animal Bedding & Litter
1. Sun Seed Co. Inc. 29%
2. Kaytee Products Inc. 21%

Small-Animal Chew Items
1. Super Pet/Pets International 34%
2. Rolf C. Hagen (USA) Corp. 13%

Small-Animal Feeding Equipment
1. Super Pet/Pets International 38%
2. Doskocil Manufacturing Co. Inc. 8%

Small-Animal Food
1. Sun Seed Co. Inc. 38%
2. Kaytee Products Inc. 26%

Small-Animal Health Aids
1. Virbac Corp. 24%
2. Eight in One Pet Products Inc. 22%

Small-Animal Housing
1. Super Pet/Pets International 37%
2. Rolf C. Hagen (USA) Corp. 12%

Small-Animal Sanitation Products
1. Super Pet/Pets International 17%
2. Rolf C. Hagen (USA) Corp. 11%

Small-Animal Toys & Exercise Products
1. Super Pet/Pets International 53%
2. Penn-Plax Inc. 19%

Small-Animal Water Bottles
1. Farnam Pet Products 17%
2. Sun Seed Co. Inc. 16%