Study on the welfare of dogs and cats involved in commercial practices

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FINAL REPORT

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ABBREVIATIONS

ATA	Animal Transportation Association
BUEC	Bureau Européen des Unions de Consommateurs
CA	Competent Authority
CFA	Cat Fanciers Association
DALY	Disability adjusted life year
DG SANCO	Directorate General for Health and Consumers
EC	European Commission
EPO	European Pet Organization
EU	European Union
EUPAW	EU Policy on Animal Welfare
FCI	Fédération Cynologique Internationale
FECAVA	Federation of European Companion Animal Veterinary Associations
FEDIAF	The European Pet Food Industry
FIFe	Fédération Internationale Féline
FVE	Federation of Veterinarians in Europe
IFAH	International Federation for Animal Health
IFAW	International Fund for Animal Welfare
IRi	Information Resources incorporation
I&R	Identification and registration
IZSAM	Istituto Zooprofilattico Sperimentale dell'Abruzzo e del Molise "G. Caporale"
MS	Member State
NA	Not Applicable
ND	Not Done
NCP	National contact point
NGO	Non-governmental organisation
OIE	World Organisation for Animal Health
PETS	PEts Travel Scheme
PFMA	Pet Food Manufacturers Association
RPO	Responsible Pet Ownership
RSPCA	Royal Society for the Prevention of Cruelty to Animals
SOP	Standard Operating Procedure
TICA	International Cat Association
ToR	Terms of Reference
TRACES	TRAde Control and Expert System
WAP	World Animal Protection
WCC	World Cat Congress
WP	Work packages
WUR	Wageningen University and Research Centre

EXECUTIVE SUMMARY

Overview

It was estimated in 2012 that in the European Union there were 60.8 million dogs and 66.5 million cats, a total of over 125 million animals and increasing annually. The keeping, breeding and trade of these animals represent a major economic activity with the annual value of cat and dog sales in the EU estimated at 1.3 billion euro and generating direct employment of 300,000 people. Pet food and care account for 22 billion euro and a further 2.1 billion euro on pet health products.

For the proper functioning of the internal market, the treaties of the EU ensure the free movement of goods, people and animals. A wide range of legislation has been developed over the years to safeguard health and security whilst enabling freedom of movement. There is however only one item of EU legislation which directly targets the welfare of dogs and cats and this relates to their transport for commercial reasons. Animal welfare standards for keeping and breeding remain the sole responsibility of Member States and national legislation on animal welfare varies between them.

In recognition of this, in 2010 the Council of the European Union considered that such "differences may lead to unequal breeding and marketing costs which could create animal welfare problems, zoonotic risks and deception of the citizens due to the purchase of animals carrying hidden diseases, including genetic defects and/or with irreversible behavioural problems".

As a result of these growing concerns, both the Council and the European Parliament urged the Commission to study the situation and investigate policy options for improvement. In consequence this study was authorised, the purpose of which was to determine to what extent initiatives would be necessary to achieve key EU objectives such as improved functioning of the internal market, protection of the consumer, public health, animal health and welfare. The Commission further underlined its commitment by introducing an annex to Regulation (EU) No 576/2013[1].

The methodology adopted by the study involved the collection of socio-economic, technical and legal data from published sources. In addition, the opinions of the main stakeholders concerned were collected by means of individually tailored questionnaires. Twelve Member States were chosen as a representative sample in accordance with the findings of the Eurostat report (2012) stating that 85% of the estimated total dog and 87% of the total estimated cat population in the EU are located there.

[1] Regulation (EU) No 576/2013 of the European Parliament and of the Council of 12 June 2013 on the non-commercial movement of pet animals and repealing Regulation (EC) No 998/2003, OJ L 178, 28.06.2013, p. 1-26

Main findings

The study identified five main areas of concern which could potentially place at risk the welfare and the health of dogs and cats.

Breeding

National laws on animal welfare directed at dogs and cats are implemented in the majority of the Member States. These however are not equally stringent and there is concern regarding the variable level of compliance. In addition, the system of registration and licensing of breeders and dealers is also considered inconsistent. For example, only one Member State registers hobby breeders. This is a potential source of risk to the health of not only the animals but also the public.

Transport

European legislation has been developed to minimise the stress suffered by animals during transport. Whilst all Member States adhere to the rules and a small number have introduced additional protection the level of implementation is variable. The systematic identification, registration and control of the movement of animals would facilitate the collection of data and ensure a more transparent market.

Lack of knowledge and information for the keeping of pets

When purchasing an animal, consumers can be woefully lacking in knowledge about the level of responsibility they are about to undertake and are unaware of the costs, often significant, of keeping an animal. Indeed, less than 20% of purchasers reported being well informed about animal welfare and health at the moment of purchase. Appropriate information on the health and welfare of animals and on consumer rights could be helpful at the time of purchase.

Discrepancies in market data of pets

It is estimated that every month around 46,000 dogs are traded between EU Member States. This compares starkly with the registrations in the Commission's TRACES system which in one year (2014) registered a total of 20,779 dogs and 2,287 cats involved in intra-EU trade. The considerable difference between these figures is a matter of concern as the health risks to both animals and humans are considered significant. These concerns have been fuelled by the rapid rise of internet trading where the chain of purchase and delivery of pets cannot easily be traced.

Consumer protection

Under EU legislation dogs and cats are considered 'goods'. Following a purchase consumers are granted a period of 6 months during which complaints of defects can be raised. Many individuals and organisations consider this inappropriate since genetic disorders would not necessarily become apparent within such a time-scale.

Two concerns are common to all of the issues raised: first the proper enforcement of the legislation and second that an exchange of knowledge between Member States would be of considerable benefit. Such could include science-based animal welfare indicators to facilitate welfare assessment and best practices covering a wide variety of subjects. This would help improve the enforcement of legislation and the general approach to the health and welfare of animals.

Documents such as self-assessment tools, checklists and guidelines for all EU citizens would encourage consumers to provide better animal care and foster responsible ownership.

THE STUDY

1 INTRODUCTION

This study concerns the "welfare of dogs and cats involved in commercial practices". Whilst the European Union (EU) has legislation on certain health requirements for intra-EU trade, there is an absence of EU legislation on broader aspects of their welfare. At the national level there is wide variation in animal welfare legislation across Member States (MS), as highlighted by a recent study on the Evaluation of EU Policy on Animal Welfare (EUPAW)[2] undertaken on behalf of the European Commission (EC).

The European Conference on the welfare of dogs and cats in the EU[3] in 2013 observed that "The rise in the lucrative trade of dogs and cats has brought problems of its own: genetic selection, puppy farming, mutilation and inhumane disposal have far reaching consequences but to date there is no harmonised EU legislation to address the welfare concerns".

The Council of the European Union has called upon the Commission, in the framework of the second EU strategy for the protection and welfare of animals "to study the differences between the measures taken by the Member States regarding the breeding of and EU trade in dogs and cats and, if appropriate, to prepare policy options for the harmonisation of the internal market"[4].

The European Parliament resolution on the Strategy for the Protection and Welfare of Animals 2012–2015: "...urges the Commission, in its 2014 study on the welfare of dogs and cats involved in commercial purposes, to recommend concrete solutions to prevent dogs and cats from being bred and traded in a way which is likely to cause welfare problems"[5] and called on the Commission to put forward an EU legal framework for the protection of pets and stray animals, including rules for the identification and registration of animals, measures to promote responsible ownership, the prohibition of unlicensed kennels and shelters, and the prohibition of the killing of stray animals[6].

The purpose of the study was to determine to what extent initiatives would be necessary to achieve key EU objectives such as improved functioning of the internal market, protection of the consumer, public health, animal health and welfare. This report is based on the collection and analysis of relevant socio-economic, technical and legal data and experts' opinions. Future options have been determined in line with the principles of subsidiarity and proportionality whilst ensuring the proper functioning of the EU internal market and of import/export transactions.

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[2] Evaluation of the EU Policy on Animal Welfare and Possible Policy Options for the Future 2010

[3] Conference on the welfare of dogs and cats in the EU" - "Building a Europe that cares for companion animals", Brussels, 28.10.2013

[4] Council Conclusions on the welfare of dogs and cats, 3050th AGRICULTURE and FISHERIES Council meeting Brussels, 29 November 2010

[5] European Parliament resolution of 4 July 2012 on the European Union strategy for the Protection and Welfare of Animals 2012-2015 (2012/2043(INI))

[6] Motion for a resolution on the establishment of an EU legal framework for the protection of pets and stray animals (2012/2670(RSP))

2 STUDY APPROACH

2.1 Scope

The study included activities related to the commercial breeding, keeping and distribution of dogs and cats. For the purposes of the study, distribution is defined as domestic sale, intra-EU trade or import/export to non-EU countries. Illegal distribution is non-compliant with applicable national or EU legislation, leading to violation of animal health requirements applicable to intra-EU trade and/or with EU or national protection requirements during transport and/or with EU or national consumer protection and safety norms. It includes stray and confiscated animals which have been re-housed.

The study concentrated on business operators having these activities as a main source of income, whilst not excluding other operators and non-profit organisations which may have an impact on the market. NGOs engaged in stray population control and adoption programmes were also included.

The study collected data from 12 representative Member States. The countries were selected to provide a geographical and socio-economic balance, so that the findings would be relevant to all Member States. Countries were selected using population data, volumes of animals traded in the EU as notified through European Trade Control and Expert System (TRACES), and geographical and socio-economic data, taking in account the main destination and dispatching countries for both species.

The selected case study countries were Belgium, France, Germany, Hungary, Italy, Netherlands, Poland, Romania, Slovakia, Spain, Sweden and the UK, in which 85% of the estimated total dog and 87% of the total estimated cat population in the EU are located[7].

2.2 Methodology

2.2.1 Literature study

Literature was gathered using four different sources: i) conventional and internet sources such as Pubmed and Google; ii) the database of the study organisations and the project team, which has extensive experience in pet welfare; iii) stakeholders selected for their expertise and experience in different relevant disciplines; iv) questionnaires - respondents were given the opportunity to upload relevant documents, which were added to the project database.

[7] Eurostat, access: Dec 2014

2.2.2 Questionnaires

2.2.2.1 Questionnaire design and promotion

In order to address the key actors in the field, tailored questionnaires were designed for each of the target groups in the case study countries, as shown in Table 1.

Table 1. Target groups addressed by questionnaires

Web-based questionnaires	Word questionnaires (disseminated by email)
Breeder associations/organisations	Dog and cat transporters
Breeders	Insurance companies
Citizens	Microchip producers
Dog and cat dealers	Pet food producers
Dog and cat shelters	Veterinary drug producers
Dog trainers	
NGOs (animal welfare non-governmental organisations)	
Private veterinarians	
Research institutes	
Veterinary organisations	
Competent authorities	

Questionnaires addressed to breeders, citizens, dealers and private veterinarians were translated into the official language in order to increase the response rate. All the on-line questionnaires were kept open for 3-4 months depending on the target group until sufficient response rates were achieved.

National typologies were developed to ensure the data analysis and study findings could be extrapolated for individual Member States as well as for the whole EU. A more detailed explanation is provided in Annex 4.

2.2.2.2 Number of respondents

Table 2 summarises the number of questionnaire respondents by stakeholder category and by case study country.

Table 2. Number of respondents to the questionnaires by case study country

	Case study countries													
	BE	**FR**	**DE**	**HU**	**IT**	**NL**	**PL**	**RO**	**SK**	**ES**	**SE**	**UK**	**TOTAL****	**Unknown Country*****
Breeder organisations	9	15	5	0	5	1	3	3	0	10	6	5	62	185
Breeders	108	490	361	31	57	95	163	82	9	65	433	126	2,020	989
Citizens	1,897	493	3,934	300	2,446	947	2,493	528	374	2,653	896	617	17,578	1,348
Dog and cat dealers	182	58	165	6	19	37	36	12	0	80	29	10	634	2,246
Dog and cat shelters	30	9	111	4	7	36	5	26	5	69	20	40	362	725
Dog trainers	68	15	205	12	86	90	40	5	0	62	93	56	732	186
NGOs	25	13	67	2	9	38	33	31	5	97	6	39	367	187
Private veterinarians	33	20	197	8	72	96	164	213	4	94	146	24	1,071	701
Veterinary organisations	8	7	23	2	2	9	14	11	3	17	36	17	149	453
TOTAL*	2,360	1,120	5,068	365	2,703	1,349	2,951	911	400	3,147	1,665	934	22,973	7,020
Total respondents for case study countries and those not indicating a country													29,993	

*Excluding questionnaires from research institutes

**Excluding questionnaires from non-case study countries

***Respondents not indicating their country of origin at the start of the questionnaire

In total there were 29,993 responses to the questionnaires, of which 22,973 indicated the case study country. The remaining 7,020 responses were excluded for country data analysis, but were included in the overall EU analysis. Not all respondents replied to all questions and blank replies were not included.

2.2.2.3 Representativeness of the respondents

To assess the representativeness of the respondents, comparisons were made with EU population averages, obtained from Eurostat data. 88% of citizen respondents were female. The younger age groups between 25 and 54 were over-represented and the over-55 age group was under-represented[8].

The average age that respondents ended full time education was in line with the average age in the EU[9]. Approximately 30% of respondents were members of a welfare organisation. Pet owners represented the majority of citizen respondents: 71% were dog owners, compared to 13% of the EU population; 45% were cat owners, compared to 15% of the population. 31% of respondents owned both species. However, it is to be expected by the nature of the survey that dog and cat owners will be more interested in responding than other citizens[10].

In summary, the age and gender distributions of citizens participating in the survey differed from those of the EU population. Furthermore, the citizens responding to the survey were more likely to be concerned with animal welfare than the overall EU population.

Therefore, the findings of this research should be interpreted with care and should be seen as an indication of the variety of opinions in the EU and not as an accurate representation of the opinion of the average citizen in Member States or the EU as a whole. However, the results give an indication of the opinion of an important target group: stakeholders with a special interest in the welfare of dogs and cats involved in commercial practices.

2.2.3 Expert opinions

A panel of 14 experts was formed to act as independent advisors during the study. The experts were selected from different Member States to represent various disciplines, as shown in Table 3. The panel was consulted at different stages throughout the study to comment on draft texts and to collect expert opinions.

Table 3. Disciplines of the expert panel members involved in the study

Relevant disciplines
Animal welfare organisation
Animal welfare research
Dog breeding
National inspection service and legislation (4 Member States)
Pet food industry
Pet transport
Veterinary practice

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8 Eurostat, access: Dec 2014
9 Excluded answers below 12 and above 80 (485 Q)
10 More information can be found in Annex 1: detailed description of the respondents of the citizens' questionnaire

2.3 Typologies of national characteristics

To ensure the data analysis and study findings provided as accurate a representation as possible across all Member States and at EU level, a classification of all Member States was developed based on certain criteria. The classification enabled extrapolation of the data analysis to the circumstances of each Member State

Relevant criteria were identified as: the disposable income per citizen; the ratio of dogs and cats per citizen; the region; the level of transposition of EU regulations into national law and the level of implementation of additional legislation.

Further information regarding the transposition of EU regulations into national law and implementation of additional legislation was collected by means of a short questionnaire, sent to the competent authorities of the Member States that were not selected as case study countries. The analysis of the responses received from the competent authorities of case study and non-case study countries did not show substantial differences. Therefore this information was not included in the classification of the Member States.

The typologies (Table 4) were used to classify all Member States and to extrapolate the findings and conclusions from the case studies to all Member States according to their classification.

Table 4. Typologies of EU Member States

Member State	Case study Member States	Pets* (million)	Citizens (million)	Pets/ Citizen	Income/ Citizen (€1,000)
Austria		2.36	8.51	0.28	24.50
Belgium	yes	3.27	11.2	0.29	23.39
Bulgaria		1.53	7.25	0.21	8.50
Croatia		no data	4.25		no data
Cyprus		***0.1	0.86		no data
Czech Republic		3.3	10.51	0.31	14.36
Denmark		1.27	5.63	0.22	21.15
Estonia		0.43	1.32	0.33	11.56
Finland		1.31	5.45	0.24	22.82
France	yes	18.83	65.86	0.29	23.89
Germany	yes	13.5	80.78	0.17	25.91
Greece		1.25	10.99	0.11	15.17
Hungary	yes	4.35	9.88	0.44	12.33
Ireland		0.75	4.6	0.16	19.16
Italy	yes	14.43	60.78	0.24	20.24
Latvia		0.72	2.00	0.36	7.92
Lithuania		1.41	2.94	0.48	13.86
Luxembourg		***0.03	0.55		29.85
Malta		***0.05	0.43		no data
Netherlands	yes	4.27	16.83	0.25	21.12
Poland	yes	13.17	38.50	0.34	13.42
Portugal		2.77	10.43	0.27	15.82
Romania	yes	8.22	19.94	0.41	8.62
Slovakia	yes	1.36	5.42	0.25	14.23
Slovenia		0.66	2.06	0.32	16.12
Spain	yes	9.20	46.51	0.20	18.44
Sweden	yes	2.00	9.64	0.21	22.80
UK	yes	17.00	64.31	0.26	21.37

*Pets refer to dogs and cats in 2012
**Not included in the further analysis due to missing data
***Only data for dogs available, not for cats

The pets/citizen ratio was calculated using data derived from statistical databases and literature[11]. As Table 4 shows, the pets/citizen ratio and income vary substantially between the different Member States. Lithuania, Romania and Hungary have the highest pets per citizen ratio (> 0.4) whereas Greece, Ireland and Germany have the lowest pets per citizen ratios (< 0.2).

[11] Eurostat; FEDIAF Facts & Figures 2012; FECAVA The economic importance of companion animals 2007; Industrieverband Heimtierbedarf, Daten und Fakten (IVH e.V.)

According to the typologies, two groups of Member States can be distinguished: those countries, with relatively high per capita income (>16,000 euro) and few pets per citizen (<0.3), and those, characterised by a relatively low per capita income (<16,000 euro) and more pets per citizen (>0.3).

The exceptions are Slovakia and Bulgaria where the number of pets per citizen is below 0.3.

Croatia, Cyprus, Luxembourg and Malta were excluded from further analysis due to lack of data or very low numbers of pets.

3 DATA ANALYSIS AND CONCLUSIONS

3.1 Overview of the dog and cat sector in the EU

3.1.1 Populations

Between 2010 and 2012, the dog and cat populations in most countries decreased slightly, whilst the total EU populations increased, again slightly. Tables 5 and 6 below shows the populations in the case study countries in 2004, 2010 and 2012[12,13].

Table 5. Dog population in case study countries

Year	2004	2010	2012	2014
	Number of dogs (million)			Inhabitants (million)
Belgium	1.7	1.3	1.3	11
France	8.5	7.6	7.4	66
Germany	5.3	5.3	5.3	81
Hungary	1.9	2.9	2.1	10
Italy	6.3	7.0	6.9	61
Netherlands	1.7	1.5	1.6	17
Poland	8.8*	7.3	7.4	38
Romania	4.3	4.2	4.1	20
Slovakia	0.8	0.3	0.9	5
Spain	5.3	4.7	5.4	47
Sweden	1.0	0.8	0.7	10
UK	6.5	8.0	8.5	64
Total	**52.1**	**50.9**	**51.6**	**430**
European Union	no data	**60.2**	**60.9**	**507**

* in 2000

Sources: see footnote 10

[12] Eurostat; FEDIAF Facts & Figures 2010.; Facts & Figures 2012; FECAVA The economic importance of companion animals 2007;

[13] FACCO 2012 La-population-francaise-d-animaux; Industrieverband Heimtierbedarf daten und fakten (IVH e.V.),

Table 6. Cat population in case study countries

Year	2004	2010	2012	2014
	Number of cats (million)			Inhabitants (million)
Belgium	2.0	1.9	2.0	11
France	9.9	11.0	11.4	66
Germany	7.5	8.2	8.2	81
Hungary	1.8	2.2	2.3	10
Italy	6.4	7.4	7.5	61
Netherlands	3.1	2.9	2.7	17
Poland	4.9	5.6	5.7	38
Romania	5.1	3.9	4.1	20
Slovakia	0.6	0.3	0.5	5
Spain	3.3	3.4	3.8	47
Sweden	1.6	1.8	1.3	10
UK	9.2	8.0	8.5	64
Total	**55.4**	**56.6**	**58.0**	**430**
European Union	no data	**64.5**	**66.5**	**507**

Sources: see footnote 10

The study calculated the number of households owning at least one dog or cat between 2010 and 2012. Table 7 shows a slight decrease in the proportion of households owning a dog, whilst the proportion owning a cat remains constant. The figures for Hungary show a marked decrease in households owning a dog between 2010 and 2012 and an increase in those owning a cat. It is expected that the popularity of cats will increase in coming years as the dog population declines. Demographic trends in Europe including ageing population, urbanisation and decrease in family size may explain why the number of dogs is decreasing and the number of cats is increasing.

Table 7. Proportion of households in the case study countries owning at least one dog or cat

Year	Dogs		Cats	
	2010	**2012**	**2010**	**2012**
Belgium	23%	24%	24%	26%
France	23%	21%	26%	27%
Germany	13%	13%	16%	16%
Hungary	44%	33%	28%	36%
Italy	21%	22%	19%	20%
Netherlands	19%	18%	26%	24%
Poland	38%	37%	30%	29%
Romania	43%	45%	42%	45%
Slovakia	25%	27%	9%	12%
Spain	27%	26%	21%	19%
Sweden	14%	13%	18%	17%
UK	22%	24%	18%	19%
European Union	27%	25%	24%	24%

Source: study data

3.1.2 Stakeholder organisations

3.1.2.1 Dog breeders

The Fédération Cynologique Internationale (FCI) is the World Canine Organisation. It includes 90 members and contract partners (one member per country), each of which issue their own pedigrees and train their own judges. They recognise 343 breeds. The FCI is not a registry and nor does it have records of breeders. Each breed is “owned” by a specific country, and those countries decide upon the standard of these breeds in co-operation with the Standards and Scientific Commissions of the FCI. The standard contains a detailed description of the ideal type of the breed. The translation, updating and publication of the standards are carried out by the FCI.

The Kennel Club is the UK’s largest organisation dedicated to the health and welfare of dogs. It is not a member of FCI. The Kennel Club was founded in 1873 and manages a voluntary register for pedigree and crossbreed dogs. It offers information on puppy buying and on dog health, training and breeding. Similar to the FCI, each breed is “owned” by a specific country, which is responsible for breed standards. The FCI and The Kennel Cub have an agreement regarding the mutual recognition of judges.

In some Member States, official recognition of breeders’ associations is regulated by national laws transposing Council Directive 91/174/EEC laying down zootechnical and pedigree requirements for the marketing of pure-bred animals and amending Directives 77/504/EEC and 90/425/EEC.

3.1.2.2 Cat breeders

Cat registries have their own rules and also organise or licence cat shows. The show procedures vary widely and awards won in one registry are not normally recognised by another. There are also several international breeders’ organisations, such as the Fédération Internationale Féline (FIFe), the International Cat Association (TICA) and the Cat Fanciers Association (CFA).

The World Cat Congress (WCC) is an international coordinating organisation of the major international federations and national associations. The purpose of the WCC is to promote better health, legislation, education and recognition of pedigrees.

3.1.2.3 Dog and cat dealers

National pet trade associations in Europe are organised under the European Pet Organization (EPO). Members are from Austria, Germany, Italy, Netherlands, Norway, Spain, Sweden, Switzerland and the UK. In France, the sector is represented by Prodaf, which is not a member of EPO.

EPO and its member organisations are involved in lobbying, providing legal and technical support to their members and organising training activities.

3.1.2.4 Veterinarians

The Federation of Veterinarians of Europe (FVE) is an umbrella organisation of veterinary organisations from 38 European countries. It aims to promote animal health, animal welfare and public health within Europe. The FVE concentrates on the education, training, application of knowledge and technical skills of veterinarians regarding health and welfare issues. The FVE has no specific policy on the breeding, trading and keeping of pets.

The Federation of European Companion Animal Veterinary Associations (FECAVA) promotes the professional development and representation of companion animal veterinarians in Europe. It represents about 30,000 veterinarians. National members represent 37 European countries and 13 European specialist groups are members.

3.1.2.5 Consumer organisations and NGOs

There is no European or international representative organisation specifically for pet owners. In the UK, the Pet Owners Association[14] provides advice and support for pet owners. The umbrella group of European national consumer organisations, BEUC (Bureau Européen des Unions de Consommateurs) aims to "promote, defend and represent the interests of European consumers", but does not specifically address pets.

Eurogroup for Animals represents various animal welfare NGOs operating within the European Union. Its main focus is on changing EU law and national legislation on issues such as irresponsible breeding, trade and movement across borders.

Animal protection NGOs include: the Royal Society for the Prevention of Cruelty to Animals (RSPCA) in the UK, World Animal Protection (WAP), Four Paws and the International Fund for Animal Welfare (IFAW). Many NGOs can be found in the World Animal Net Directory[15] database.

3.1.3 Economic development of the sector in the EU

3.1.3.1 Pet care and pet food

This sector is becoming increasingly economically important. Estimates of the size vary substantially but specific data for dogs and cats were not available because the statistics including other pet animals such as ornamental birds, aquaria and small mammals. The European Pet Food Industry (FEDIAF) suggests that the annual turnover of pet food, pet care products and services was estimated to be 11 billion euro in 2012 against 10.5 billion euro in 2010[16].

A recent CALLISTO report that represents data for dogs, cats, horses, rabbits, ferrets, guinea pigs, reptiles, birds and ornamental fish[17] estimated the total size of the market for pet care products at 19.7 billion euro for 12 Member States, as shown in Table 8. Pet food is the

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14 Pet Owners Association UK http://www.pet-owners.co.uk /
15 World Animal Net Directory http://www.worldanimal.net/directory/search-wan-directory
16 FEDIAF Facts & Figures 2010.; Facts & Figures 2012
17 CALLISTO 2012. Strategy Report – First cycle http://www.callistoproject.eu/joomla/attachments/article/77/strategy_report_first_cycle.pdf

major share of the market. It is acknowledged that many pets are not given pet food bought in retail shops, but are fed on scraps and left-over human food.

Table 8 indicates substantial differences in retail sales per pet in the different Member States.

By extrapolation, the total retail value for the EU pet care sector can be estimated at 22 billion euro in 2013[18].

Table 8. Pet care retail sales in the case study countries, 2013[17]

Country	Euro (million)*	Retail value per pet (Euro/year)**
Sweden	591	296
Netherlands	1,198	281
Germany	3,759	278
UK	4,636	273
France	4,046	215
Belgium	617	189
Italy	2,524	175
Spain	1,321	144
Hungary	286	66
Slovakia	88	65
Poland	509	39
Romania	152	18
Total	**19,727**	
European Union	**22,300**	

* Retail value of pet care products, including pet foods and pet products. Not including cost of veterinary care or prescription drugs.

** Retail value per pet

Source: footnote[17] and study data

3.1.3.2 Animal health

There is also a large market for animal health products[19]. Total sales of animal health products by IFAH[20] companies in 2013 were 23 billion US dollars, of which 41% was related to pets (dogs, cats, ornamental birds, aquaria and small mammals) and 31% was generated in Europe[21]. Based on these numbers, and expressed in euro, the European market for animal health products can be estimated at 2.1 billion euro per year.

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18 Whole EU except Croatia, Cyprus, Luxembourg, Malta since for these countries an estimate for total number of pets is missing.

19 Veterinarian medicinal products including homeopathic products

20 International Federation for Animal Health (IFAH) is the global representative body of companies engaged in research, development, manufacturing and commercialisation of veterinary medicines, vaccines and other animal health products in both developed and developing countries across the five continents.

21 http://www.ifahsec.org/our-industry/animal-health-industry-global-market-review-2011/

3.1.3.3 Employment

According to FECAVA, 289,000 people were employed in the European pet sector in 2009[22]. This includes occupations such as trainers, groomers, veterinarians, nurses and breeders. EUPAW estimated that in 2009 the number of breeders was approximately 32,000 and that about 78,000 veterinarians were working in companion animal practices[23] which compares with the estimate in 2007 which showed the number of veterinarians working with dogs and cats to be just 35,000[22].

Annex 3 provides more information on the socio-economic findings of the pet sector in the case study Member States.

3.1.3.4 Consumer spending

The citizens' questionnaire conducted by the study asked about the amount spent on buying and keeping pets in the case study countries.

Table 9. Amount spent on buying a dog

Euro	EU*
0	47%
1-49	3%
50-99	3%
100-199	8%
200-499	16%
500-999	13%
1,000–1,999	9%
>2,000	1%
	100%
Total respondents	**12,083**

*Percentage of the responses
Source: study data

[22] FECAVA The economic importance of companion animals 2007;
[23] EUPAW 2010. http://www.eupaw.eu/docs/Final%20Report%20-%20EUPAW%20Evaluation.pdf

Table 10. Amount spent on buying a cat

Euro	EU*
0	74%
1-19	2%
20–49	3%
50-99	6%
100–199	5%
200 499	4%
500 999	5%
>1,000	1%
	100%
Total respondents	**8,684**

*Percentage of the responses

Source: study data

Although there was a low response rate to both of these questions, the results nevertheless indicate a large variation in the price paid for a pet.

Overall 46% of respondents in the EU did not pay for their dog, whilst 10% paid 1,000 euro or more.

Similarly, 73% of respondents did not pay for their cat and 7% paid 500 euro or more.

Table 11. The amount considered reasonable by respondents to pay per year to keep a dog

Euro	EU*
0-199	13%
200-499	32%
500–999	28%
1,000–1,999	21%
2,000-2,999	6%
	100%
Number of responses	**786**

*Percentage of the responses

Source: study data

Table 12. The amount considered reasonable by respondents to pay per year to keep a cat

Euro	EU*
0-99	15%
100–199	16%
200-499	34%
500–999	24%
1,000–1,499	11%
	100%
Number of responses	**760**

*Percentage of the responses

Source: study data

The amount of money people are willing to pay to keep a dog or cat varies substantially between the respondents. Citizens are willing to pay more when purchasing a dog than a cat.

3.1.4 Dog and cat breeding and distribution

3.1.4.1 Breeding

The responses indicate that breeding is mainly a hobby activity. Of the 2,020 breeders who indicated their country of origin, 87% were hobby breeders and 13% professional. Only 5% indicated that breeding was their main source of income. More than 75% breed less than 10 animals per year and only 7% sell more than 20 animals per year.

Of the dealers, 43% indicated an annual turnover of less than 10,000 euro and 16% indicated a turnover over 200,000 euros. Twenty nine per cent of dog dealers sell less than ten dogs per year and 59% of cat dealers sell less than ten cats. However 10% of dog dealers and 5% of cat dealers sell more than 200 animals per year.

Further information on stakeholders who participated in the survey is shown in Annex 1.

3.1.4.2 Distribution

It has already been stated that estimates from data sources indicate domestic sales and intra-EU trade amounts to 46,000 dogs per month[24]. There are however no accurate numbers for dog and cat distribution in Europe.

For commercial purposes 20,779 dogs and 2,287 cats were registered in TRACES for intra-EU trade in 2014. Tables 13 and 14 present TRACES data showing the origin and destination countries for intra-EU trade in 2012 and 2014. Hungary, Slovakia and Spain were the main countries of origin. These three countries account for 68% and 71% of the registered trade in dogs and cats respectively. The destinations for 71% of dogs were France, Germany and UK. The destinations for 70% of cats were Germany, Spain and UK.

[24] http://buzhonden.weebly.com/cijfers.html

Table 13. Top five case study Member States for intra-EU trade in dogs

Member State of origin					
Dogs 2012			Dogs 2014		
Country	Number	% of EU total	Country	Number	% of EU total
SK	46,696	40.7%	ES	7,561	36.4%
HU	32,900	28.7%	HU	4,474	21.5%
ES	9,343	8.1%	SK	2,106	10.1%
BE	4,126	3.6%	RO	2,026	9.7%
NL	3,139	2.7%	IT	760	3.7%
Sub-total	**96,204**	**83.8%**	**Sub-total**	**16,927**	**81.4%**
Member State of destination					
Dogs 2012			Dogs 2014		
Country	Number	% of EU total	Country	Number	% of EU total
ES	26,495	21.5%	DE	11,862	57.1%
IT	23,364	19.0%	UK	1,878	9.0%
BE	22,940	19.0%	FR	1,061	5.1%
DE	17,729	14.4%	IT	994	4.8%
FR	10,237	8.3%	BE	985	4.7%
Sub-total	**100,765**	**82.2%**	**Sub-total**	**16,780**	**80.7%**
Source: TRACES, 2012 and 2014					

Table 14. Top five case study Member States for intra-EU trade in cats

Member State of origin					
Cats 2012			Cats 2014		
Country	Number	% of EU total	Country	Number	% of EU total
SK	6,568	33.0%	ES	1,087	47.5%
HU	6,175	31.0%	HU	329	14.4%
ES	2,499	12.6%	SK	205	8.9%
BE	907	4.6%	RO	147	6.4%
PL	88	0.4%	FR	85	3.7%
Sub-total	**16,237**	**81.6%**	**Sub-total**	**1,853**	**80.9%**
Member State of destination					
Cats 2012			Cats 2014		
Country	Number	% of EU total	Country	Number	% of EU total
IT	6,502	30.5%	DE	1,260	55.1%
ES	5,453	25.6%	GB	200	8.7%
BE	2,824	13.3%	ES	150	6.6%
DE	2,691	12.6%	IT	128	5.6%
FR	1,553	7.3%	BE	105	4.6%
Sub-total	**19,023**	**89.3%**	**Sub-total**	**1,843**	**80.6%**
Source: TRACES, 2012 and 2014					

The TRACES data suggests a substantial reduction in intra-EU trade between 2012 and 2014. The recorded number of dogs traded fell by around 83% and the number of cats by around 89%.

Intra-EU trade of dogs and cats for commercial purposes must be registered in TRACES. However, several stakeholders, experts and reports have indicated that TRACES data is likely to underestimate the actual volume of trade. This is because trade with the obligation of registration is often disguised as non-commercial distribution. For example in 2013, 151,367 dogs were recorded as entering Great Britain under the PETS scheme for pets travelling with their owner, of which 53,911 came from other Member States[25]. In contrast, only 1,878 dogs were recorded in TRACES in 2014 as intra-EU trade to UK from other MS.

The Internet plays an increasing role in trade in the EU. Many breeders indicated that they started trading or advertising on the internet in recent years. An indication of the volume of this trade was revealed by a Dutch investigation in 2006[26], when students investigated the number of pet animals offered for sale on the internet in the Netherlands. Over a 14-day period, 11,423 new advertisements offering adult dogs and cats, kittens and puppies were counted over 12 websites. Dogs were offered more often than cats, with puppies being offered the most (16,409, or about 61%). The animals had an estimated total value of around 6.8 million euro.

3.1.4.3 Import/Export to non-EU countries

The import of dogs and cats for commercial purposes into the Member States is entered into TRACES. However, there are ways to circumvent the official transport routes and the details are shared on internet fora, as is the case for intra-EU trade of dogs and cats. Nonetheless, the numbers provide an indication that significant numbers of dogs and cats are imported into the EU from non-European countries, and the numbers are relatively stable, except for the UK where numbers went down between 2012 and 2014. This is probably due to new regulations. Countries from which most dogs are imported are the USA, Australia, South Africa, Russia and New Zealand. Cats are mostly imported from the USA and Australia. Table 15 lists the top five EU countries that import most of the animals. In TRACES export data to non-EU countries are only entered when animals pass via another Member State, and hence do not allow estimates on dogs or cats exported to non-EU countries.

[25] RSCPA 2013. Pushing at an open door – how the present UK controls on rabies are failing
[26] Dieren gedownload; Platform Verantwoord Huisdierenbezit (PVH), Hogeschool Van Hall Larenstein, Projnr. 364117, 2006

Table 15. Top five case study Member States for import of dogs and cats from non-EU countries

Dogs 2012			Dogs 2014		
Country	Number	% of EU total	**Country**	Number	% of EU total
UK	5143	43%	**UK**	1908	20%
DE	1265	11%	**DE**	1548	16%
FR	1236	10%	**FR**	1514	15%
NL	880	7%	**NL**	1737	18%
IT	508	4%	**IT**	654	7%
Sub-total	9032	76%	**Sub-total**	7361	75%
EU total	11896	100%	**EU total**	9771	100%
Cats 2012			**Cats 2014**		
Country	Number	% of EU total	**Country**	Number	% of EU total
UK	3168	65%	**UK**	432	21%
DE	468	10%	**DE**	513	25%
FR	308	6%	**FR**	161	8%
NL	181	4%	**NL**	194	9%
IT	119	2%	**IT**	133	6%
Sub-total	4244	86%	**Sub-total**	1433	70%
EU total	4907	100%	**EU total**	2060	100%

Source: TRACES, 2012 and 2014

Costs associated with import of dogs and cats are the value of the animal itself, the costs of health checks, vaccinations and export permits, and transport costs. Expert opinions estimated an average value of dogs that are imported at 1,000 euro and cats at 500 euro and the costs of health checks, vaccinations and export permits at 150 euro for dogs and cats, and transport costs at 1,000 euro for dogs and 750 euro for cats[27]. The total value for the EU associated with import of dogs is estimated at approximately 21 million euro (2014), and for cats 3 million euro (2014).

3.2 Dog and cat health and welfare

3.2.1 Movement and Transport

Animal movements are one of the main risk factors for the spread of animal diseases, as evidenced by cases of infection in non-endemic regions[28]. This risk increases with the volume of uncontrolled movements, such as non-registered pet trade. A recent report by the Dog Trust[29] highlighted the gaps in the non-commercial Pet Travel Scheme and in the UK border controls, which are failing to prevent the illegal introduction of puppies into the UK. According to the report this could lead to the introduction of rabies into a rabies-free country.

[27] Animal Transportation Association, expert opinion

[28] Englund, L Pringle, J (2003). New diseases and increased risk of diseases in companion animals and horses due to transport. Acta veterinaria Scandinavica, sup. 100, 19-25

[29] Dog Trust 2014. The puppy smuggling scandal – an investigation into the illegal entry of dogs into Great Britain under the Pet Travel Scheme

In addition to the risk of spreading infectious diseases transmissible to humans and livestock, pet animal transport can also affect the well-being of the animals involved[30]. Poor management of the animals during transport can affect both their clinical and emotional state. Dogs, for example, may suffer from hyperthermia and, as a result of transport stress, in dogs and cats latent and sometimes zoonotic infections may become reactivated. Recent studies show that transport can have a negative effect on dogs' behaviour. This can lead to behavioural problems such as insistent barking, over-excitement, phobia and vomiting[31,32]. For cats such published studies have not been identified.

3.2.1.1 Legal framework

The commercial movement of animals must comply with the Directive 92/65/EEC[33]. Non-commercial movements of pet animals are subject to Regulations (EU) No 576/2013 and No 577/2013[34]. Directive 90/425/EEC[35] lays down rules relating to veterinary and zootechnical checks to be applied to live animals and products of animal origin for intra-Community trade. This legislation abolishes veterinary and zootechnical checks at the Union's internal borders and reinforces those carried out at the point of origin, during transit and at the place of destination. Dogs and cats must come from holdings or businesses which are registered by the competent authority and are not subject to any ban on animal health grounds (including rabies), and which undertake to have these animals regularly examined, to notify possible disease and to comply with the requirements ensuring the welfare of the animals held.

Dog and cat transport carried out for commercial purposes within the EU must comply with Regulation (EC) No 1/2005[36]. Additional provisions and technical standards for air transportation have been provided by IATA[37] in 2015.

Member States are at liberty to apply stricter national measures aimed at improving the welfare of animals during transport. Responses from the questionnaires submitted to the national competent authorities were analysed to investigate the presence and characteristics of the existing national regulatory frameworks related to dog and cat transport. Table 16 showed that the national measures have generally not been introduced. France, Germany, Spain and Sweden have a national legal framework providing specific

[30] Wohr, A. C. and M. H. Erhard (2004). "Travel with dogs - Aspects of animal welfare." Tierarztliche Praxis Ausgabe Kleintiere Heimtiere 32(3), 148-157

[31] Frank D., Gauthier A., Bergeron R. (2006). Placebo-controlled double-blind clomipramine trial for the treatment of anxiety or fear in beagles during ground transport. Canadian Veterinary Journal, 47, 1102–1108; Cannas S., Evangelista M., Accorsi P.A., Michelazzi M. (2010). An epidemiology study on travel anxiety and motion sickness. Journal of Veterinary Behavior: Clinical Applications and Research 5, 25-26

[32] Benchaoui H.A., Siedek E. M., De La Puente-Redondo V. A., Tilt N., Rowan T. G., Clemence R. G. (2007). Efficacy of maropitant for preventing vomiting associated with motion sickness in dogs. Veterinary Record, 161, 444-447

[33] Council Directive 92/65/EEC of 13 July 1992 laying down animal health requirements governing trade in and imports into the Community of animals, semen, ova and embryos not subject to animal health requirements laid down in specific Community rules referred to in Annex A (I) to Directive 90/425/EEC, OJ L 268, 14.9.1992, p. 54–72

[34] Regulation (EU) No 576/2013 of the European Parliament and the Council of 12 June 2013 on the non-commercial movement of pet animals and repealing Regulation (EC) No 998/2003; Regulation (EU) No 577/2013 of the European Parliament and the Council of 28 June 2013 on the model identification documents for the non-commercial movement of dogs, cats [...]

[35] Council Directive 90/425/EEC of 26 June 1990 concerning veterinary and zootechnical checks applicable in intra- Community trade in certain live animals and products with a view to the completion of the internal market. OJ L 224 , 18.08.1990, p29 - 41

[36] Council Regulation (EC) No 1/2005 on the protection of animals during transport and related operations and amending and amending Directives 64/432/EEC and 93/119/EC and Regulation (EC) No 1255/97. OJ, L 3, 05.01.2005.

[37] IATA International Air Transport Association (2015). Live animals regulations. Montreal: International Air Transport Association.

requirements for the transport of dogs. The same four countries, plus Italy, have a similar framework for cats.

Table 16. Case study Member States with a national legal framework providing specific requirements for the transport of dogs and cats

	Case study Member State												Total
	BE	DE	ES	FR	HU	IT	NL	PL	RO	SE	SK	UK	
Dogs	-	+	+	+	-	-	-	-	-	+	-	-	4
Cats	-	+	+	+	-	+	-	-	-	+	-	-	5

Source: study data

When in place, the legal framework applies to dog and cat dealers, professional transport companies and professional breeders (except professional breeders in Spain).

Table 17 indicates national opinions on the level of compliance with national legislation. In three of the five cases, the compliance is at the minimum value of 1, meaning no compliance.

Table 17. Level of compliance with national legislation on transport of dogs and cats

	Case study Member State*											
	BE	DE	ES	FR	HU	IT	NL	PL	RO	SE	SK	UK
Compliance rating	NA	1	1	5	NA	5	NA	NA	NA	1	NA	NA

*1= no compliance, 7= full compliance; NA= not applicable
Source: study data

Non-compliance of transport documents due to poor communication between stakeholders is indicated as a major problem by France. Slovakia, although not having a national regulatory framework in place for dog and cat transport, reported non-compliance with transport documents required under EU legislation as a major issue.

45% of countries chose information and education campaigns as their preferred actions, while 36% of Member States called for better implementation and enforcement of existing standards. National competent authorities were selected by the majority of the Member States as the preferred body to implement the suggested actions, followed by the EU.

Annex 2 includes a table summarising relevant topics present in national legalisation in all Member States based on the study data.

3.2.1.2 Perceived risks of animal transport and movement

A total of 2,020 individual breeders answered the breeder questionnaire. Of these, 77% did not consider regular transport of animals as part of their commercial and promotional activities. Sweden and Italy had a higher number of breeders who were involved in transport. Cat breeders were more likely to be involved in regular transport of animals as part of their commercial and promotional activities.

The main risks associated with commercial transport, as identified by breeders, breeder organisations, veterinary organisations and NGOs involved in pet transport are animal welfare impairment and stress. Veterinary organisations and breeder organisations also mention human health risks, meaning zoonoses, in approximately 20% of cases. Breeders and NGOs also mention death of the animals as an important risk.

A similar question was posed to dealers, who were asked to identify the main threats to traded animals. Illegal trade was identified by 42% of dog dealers and 22% of cat dealers. The same proportion of cat dealers identified infectious disease.

One of the major pet shipping companies in the EU was interviewed to collect opinions on the main threats for dog and cat air transportation. A lack of health control by competent authorities on animals travelling as excess baggage was reported to be the primary issue as this presents animal and public health risks.

Over 80% of breeder organisations responded that further action on animal transport is necessary to improve welfare. The preferences were for proper enforcement and implementation of legislation as well as information and education campaigns. Competent authorities were favoured by 45% as the responsible body, whilst 29% proposed the EU. Dealers also had a low response rate, but those who answered had the same opinions as the breeders.

Shelter managers also declared that further action is needed on transport. The majority of respondents favoured proper enforcement, followed by the implementation of regulations and information and training initiatives.

NGOs answered similarly to the other stakeholders, indicating the need for enforcement and implementation of current legislation and information and education activities. The EU and competent authorities were the preferred responsible bodies. NGOs that regularly transport dogs for adoption considered particularly that information and education are important requirements.

3.2.2 Breeding and keeping

Dogs and cats are the most popular companion species in the EU, where they are often considered as a member of the family[38]. Hence, it is clear that their welfare is an important issue.

Whilst it is well known that people derive physical and mental benefits from dog ownership, it is increasingly questioned whether modern breeding practices allow dogs to enjoy corresponding health and welfare benefits[39]. In fact, selection pressure towards phenotypic exaggeration driven by breed standards has increased the potential for conformation-associated disease. A similar situation can be observed for cats[40]. Also, selection pressure to

[38] Murphy M.D., DVM, PhD; Larson, J. PhD; Tyler, A., Kvam, V., BA; Frank, K., BA; Eia, C., DVM, JD, MPH; Bickett-Weddle, D., DVM, PhD, MPH; Flaming, K., DVM, PhD; Baldwin, C.J., DVM; Petersen, C.A., DVM, PhD (2013). Assessment of owner willingness to treat or manage diseases of dogs and cats as a guide to shelter animal adoptability. *Journal of the American Veterinary Medical Association*, *242*(1), 46-53.

[39] O'Neil, D. G., Church, D. B., McGreevy, P. D., Thomson, P. C., and Brodbelt, D. C. (2014). Prevalence of Disorders Recorded in Dogs Attending Primary-Care Veterinary Practices in England. PloS one, 9(3), e90501.

[40] Sonntag, Q., & Overall, K. L. (2014). Key determinants of dog and cat welfare: behaviour, breeding and household lifestyle. *Revue scientifique et technique (International Office of Epizootics)*, *33*(1), 213-220.

refine breeds by inbreeding contributes to a loss of genetic diversity, increasing the likelihood of recessive disorders[41].

Other health and welfare related issues arise from the housing conditions[42] both in rearing and sale sites. Inappropriate housing and management increase the likelihood of health and behavioural problems[43,44].

In particular, pet shops are considered to present a risk to both animal health[45] and welfare, and may cause pets to become unsuitable as companion animals due to behavioural problems[44].

3.2.2.1 Legal framework

Council Directive 91/174/EEC lays down zoo-technical and pedigree requirements for the marketing of pure-bred animals[46]. However, implementing measures have yet to be adopted[47]. Standards exist in some countries either at national, regional or municipal levels[48].

National competent authorities were asked about the status of their national regulatory frameworks on the welfare of dogs and cats. The analysis of the replies showed that most have a national legal framework. Romania does have specific legislation for stray dogs since 2001 (see Table 18).

Table 18. Presence of a national legal framework providing for the welfare of dogs and cats

	Case study Member State												Total
	BE	DE	ES	FR	HU	IT	NL	PL	RO	SE	SK	UK	
Dogs	+	+	+	+	+	+	+	+	-	+	+	+	11
Cats	+	+	+	+	+	+	+	+	-	+	+	+	11

Source: study data

Table 19 shows topics covered in the national legislation regarding the welfare of dogs and cats with an owner. Stray animals are excluded.

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41 Bellumori, T. P., Famula, T. R., Bannasch, D. L., Belanger, J. M., & Oberbauer, A. M. (2013). Prevalence of inherited disorders among mixed-breed and purebred dogs: 27,254 cases (1995–2010). Journal of the American Veterinary Medical Association, 242(11), 1549-1555.

42 Hubrecht, R. C. (2002). Comfortable quarters for dogs in research institutions. Comfortable quarters for laboratory animals, Animal welfare institute, PO Box, 3650, 56-64.; Rochlitz, I. (2002). Comfortable quarters for cats in research institutions. Comfortable quarters for laboratory animals, Animal welfare institute, PO Box, 3650, 50-55

43 Uzunova, K., Stoyanchev, T., Iliev, A., Miteva, C., Mitev, J., & Stoycheva, I. (2008). Comparative veterinary hygienic evaluation of stray dog shelters and their categorization. Trakia J. Sci, 6, 27-33.; McMillan, F. D., Serpell, J. A., Duffy, D. L., Masaoud, E., & Dohoo, I. R. (2013). Differences in behavioral characteristics between dogs obtained as puppies from pet stores and those obtained from noncommercial breeders. Journal of the American Veterinary Medical Association, 242(10), 1359-1363

44 McMillan, F. D., Serpell, J. A., Duffy, D. L., Masaoud, E., & Dohoo, I. R. (2013). Differences in behavioral characteristics between dogs obtained as puppies from pet stores and those obtained from noncommercial breeders. Journal of the American Veterinary Medical Association, 242(10), 1359-1363.

45 Halsby, K. D., Walsh, A. L., Campbell, C., Hewitt, K., & Morgan, D. (2014). Healthy Animals, Healthy People: Zoonosis Risk from Animal Contact in Pet Shops, a Systematic Review of the Literature. *PloS one*, *9*(2), e89309.

46 Council Directive 91/174/EEC laying down zootechnical and pedigree requirements for the marketing of pure-bred animals and amending Directives 77/504/EEC and 90/425/EEC ; OJ, L 85, 37-38, 25/03/1991.

47 Proposal for a REGULATION OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL on the zootechnical and genealogical conditions for trade in and imports into the Union of breeding animals and their germinal products /* COM/2014/05 final - 2014/0032 (COD)

48 Voslářvá, E., and Passantino A. 2012. "Stray dog and cat laws and enforcement in Czech Republic and in Italy." Annali dell'Istituto superiore di sanità 48.1, 97-104.

Table 19. Topics covered in the national legislation of individual Member States*

Topics	Case study Member State												Total
	BE	DE	ES	FR	HU	IT	NL	PL	RO	SE	SK	UK	
Euthanasia	+	+	+	+	+	+	+	+		+	+	+	11
Abuse	+	+	+	+	+	+	+	+		+	+	+	11
Health care			+		+	+	+				+	+	6
Housing	+	+	+	+	+	+	+	+		+	+	+	11
Feeding/water supply	+	+	+	+	+	+	+	+		+	+	+	11
Protection from pain and disease	+	+	+	+	+	+	+	+		+	+	+	11
Right to perform appropriate behaviour	+	+		+	+			+		+	+	+	8
Abandonment	+	+	+	+	+	+	+	+		+	+	+	11
Neutering		+	+		+	+						+	5
Information and education						+		+				+	3
Others	+					+						+	3

* does not cover stray animals
Source: study data

The level of compliance with the above legislation, as perceived by the competent authorities, is reported in Table 20. Compliance is generally perceived as quite high with a median of 5, although non-compliance is reported by Spain, Poland and the UK out of those with relevant legislation.

Table 20. Compliance with national legislation on welfare of dogs and cats

	Case study Member State											
	BE	DE	ES	FR	HU	IT	NL	PL	RO	SE	SK	UK
Compliance rating	5	5	1	6	5	6	4	1	NA	4	5	1

(1= no compliance, 7= full compliance; NA= not applicable).
The level of compliance is as perceived by the respective competent authorities.
Source: study data

For France, the Netherlands, Spain and the UK information is not available on the main reasons for low compliance. For Belgium, Hungary and Slovakia the non-compliance depends on human factors, regarding professionals and owners.

Competent authorities from Germany, Sweden and the UK declared no need for further action to improve current legislation on dog and cat welfare. Amongst the other Member States, the preferred options were further regulation as well as information and education. The EU was the preferred responsible body for these actions, followed by veterinarians, individual breeders and breeders' organisations. National competent authorities were generally not favoured as the responsible body.

3.2.2.2 Technical standards and guidelines

Breeders' organisations develop guidelines mainly in the area of breeding and breed standards[49]. Breeders indicated that there are voluntary national standards issued by competent authorities for health and social behaviour of pedigree dogs[50].

Nevertheless, only three competent authorities reported having technical standards for breeders in their country: the UK has standards for dogs; Slovakia and Italy have them for both dogs and cats.

None of the NGOs indicated that their duties included 'preparation of guidelines/operational manuals'.

Shelters from all Member States except France and Poland indicated that there are voluntary national standards issued by competent authorities for operating shelters. Shelters from Poland and France did not indicate such guidelines or standards. However, the reply rate in those countries was very low with nine shelters in France and five in Poland.

3.2.2.3 Registration of breeders and dealers

The survey found differences between Member States in the requirements for registration of breeders and dealers. The registration of professional dog breeders is a legal requirement in all countries except Poland and Slovakia. Registration is required for professional cat breeders in all except Poland, Slovakia, Romania and the UK. However, Hungary, Poland, Slovakia, Spain and Romania do not have legal criteria to define professional breeders.

Registration of hobby breeders is not required, apart from in Belgium.

All countries except Poland and Romania have legislation specifying the level of housing, licensing, training, record keeping and other conditions required for professional dog breeders. A similar legal framework applies for professional cat breeders in all countries except Poland, Romania and the UK.

There are minimum legal requirements for hobby breeders of both species in Belgium, Hungary, Italy, Slovakia, and Sweden and for hobby dog breeders only in Germany.

Dealers need a license to sell both species in Belgium, Germany, Italy, the Netherlands and Spain. Most countries have legislation specifying minimum requirements for dealers. The situation in Poland, Romania and the UK was not recorded in the survey.

3.2.2.4 Animal welfare threats

Breeders were asked to identify threats to the welfare of their animals. Health risks were considered to be the most important problem, followed by illegal trade. Similar views were expressed by professional and hobby breeders.

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49 Example: FCI breeding rules: http://www.fci.be/en/Breeding-42.html

50 Example: Sweden: Code of Ethics Breeding Policy Ethical Guidelines http://www.skk.se/Global/Dokument/Om-SKK/Code-of-ethics_breeding-policy_ethical-guidelines_webb.pdf

Breeders' organisations indicated the lack of identification as the most important threat to welfare, followed by illegal distribution and inbreeding.

Veterinary organisations identified the main threats for dogs to be inbreeding, abuse or mistreatment and infectious diseases. Abuse or mistreatment was identified as the main threat for cats, followed by infectious diseases and poor husbandry conditions.

NGOs identified the main welfare threats for both species to be mistreatment or abuse, illegal trade and inbreeding.

Most citizens indicated that further action to improve welfare in their country is needed. Very few felt it was not necessary. However, the high prevalence of members of animal protection associations among the respondents should be noted as it may have influenced the results. Annex 1 describes the citizens responding to the survey.

Similar responses were given by owners and non-owners. Further action was more likely to be requested by persons adopting stray dogs than by those who bought their dogs from breeders. The level of ownership training was correlated to the perceived need for further action. People who had attended ownership courses were more likely to consider that further action was not required.

There was also a correlation between the age of the respondents and the perceived need for further action. Younger respondents in the 15-24 age group desired action, whilst respondents over 55 years were less likely.

Gender also influenced the responses: males were less likely to require further action and females more likely. The questionnaire did not contain more questions about the kind of action they favoured.

Country differences were also evident. Citizens from Belgium, Germany, the Netherlands, Poland, Spain and the UK were more likely to consider action necessary, whilst those from Hungary, Italy, Slovakia and Sweden were less in favour. There was no correlation between work experience or annual income and the perceived need for further action.

More than 80% of breeder organisations would like the EU to take further action to improve welfare legislation. Veterinarians responded similarly. Both groups considered education to be the preference, followed by enforcement of existing legislation.

Almost all shelter managers and NGOs declared that further welfare action is needed. Most indicated proper enforcement as the preferred action, followed by new regulations and information and training initiatives. The national competent authorities were the bodies identified by respondents to take responsibility for the actions.

3.2.3 Stray animals

A complete analysis of stray animals could not be undertaken within the scope of this study but since they have a potential effect on the health and welfare of animals and humans the problem has to be acknowledged. The stray population originates for a number of reasons notably uncontrolled reproduction, economic difficulties, unwanted acquisitions and owners relocating[51,52]. Management of stray populations is a significant cost for competent authorities who are called upon to provide shelter, vaccination and sterilisation programmes but this does not fall within the remit of EU policy.

3.2.4 Training activities for stakeholders

3.2.4.1 Breeders

Most breeders reported participating in educational or training activities on animal care, animal health, good breeding practices, animal behaviour and socialisation and zoonoses. It appeared that greater proportions of breeders from France, Germany and Sweden participated in training than in other countries.

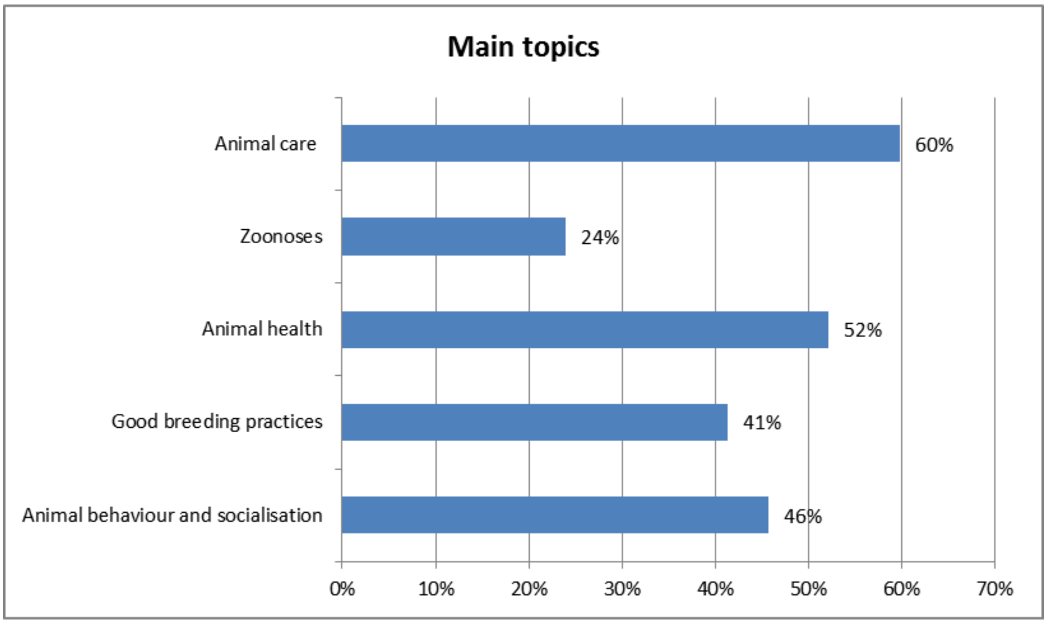
Breeding organisations and kennel clubs were the most active organisers of training activities. Universities and other educational institutes were particularly active in training in animal behaviour and socialisation. Veterinarians were active in training in animal health, zoonoses and animal care activities such as breeding, nutrition, housing and husbandry.

3.2.4.2 Dealers

Dealers declared that they participated in training on subjects including animal care, animal health, and animal behaviour and socialisation. A small proportion participated in training on zoonoses (Figure 1).

[51] King T., Marston L.C., Bennett P.C. 2012 Breeding dogs for beauty and behaviour: Why scientists need to do more to develop valid and reliable behaviour assessments for dogs kept as companions. Applied Animal Behaviour Science 137, 1-12.
[52] Vučinić M., Đorđević V., Radisavljević K., Atanasijević N. & Nedeljković-Trailović J. 2011. Feeding behavior of stray dogs in a municipal shelter. Acta Vet. (Beogr) 61, 99-105,

Figure 1. Proportion of pet dealers participating in training initiatives

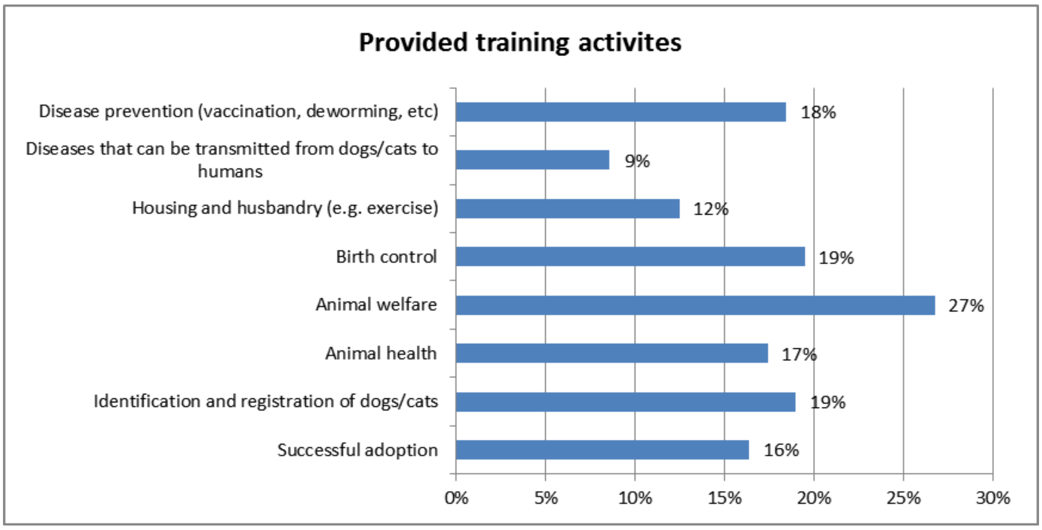


The main providers of training for pet dealers were: breeding organisations and kennel clubs for animal behaviour and good breeding practices; competent authorities for animal health; and veterinarians for zoonoses and animal care.

3.2.4.3 Dog and cat shelters

Dog and cat shelters are both providers and recipients of training. Training is provided primarily on animal welfare, followed by identification and registration (I&R), birth control, and disease prevention, as shown in Figure 2.

Figure 2. Proportion of shelter training clients taking part in various training activities



Shelters primarily provide training to prospective owners.

Shelter managers received training on animal behaviour and socialisation, animal care, and animal health. Shelter staff and volunteers receive training on birth control. Veterinarians and other associations were the most common external providers of training to shelter staff.

Information and education are considered by shelter managers as useful actions for improving the problem of stray animals. National competent authorities are the preferred bodies to provide action.

3.2.4.4 Dog trainers

The questionnaire for dog trainers investigated the training activities that they provided. Human/animal relationships, behaviour, and socialisation with other dogs were the most common activities, as shown in Figure 3.

Figure 3. Percentage of dog trainers' clients participating in different training activities

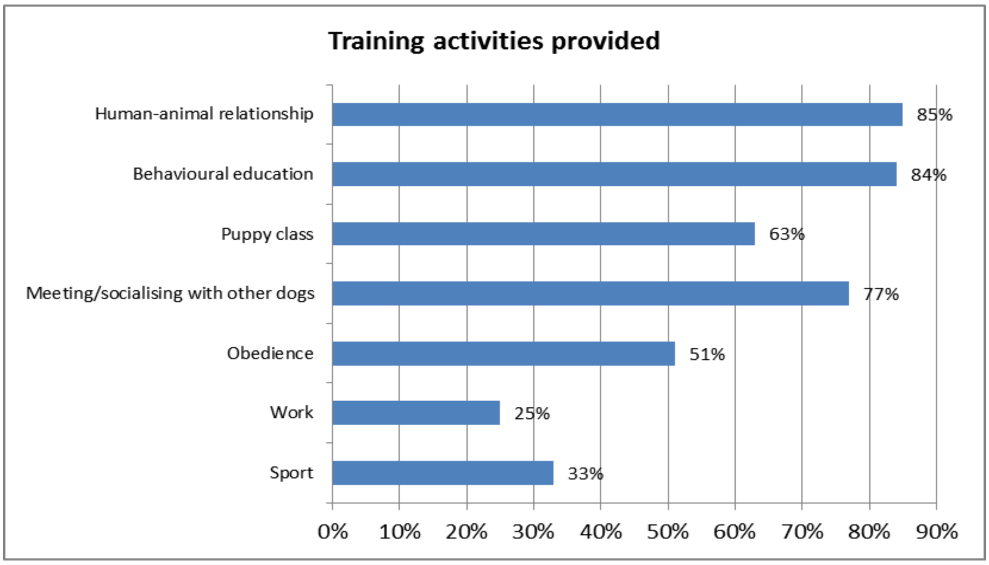
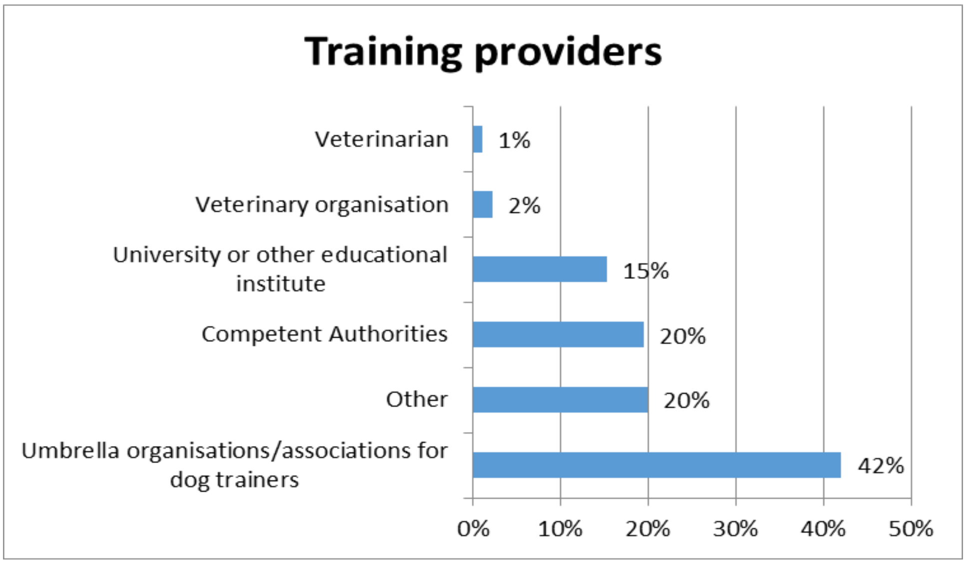


Figure 4 shows that almost all dog trainers reported that they regularly receive training themselves to update and extend their own professional capacity. Such events are organised by a range of providers, particularly umbrella organisations.

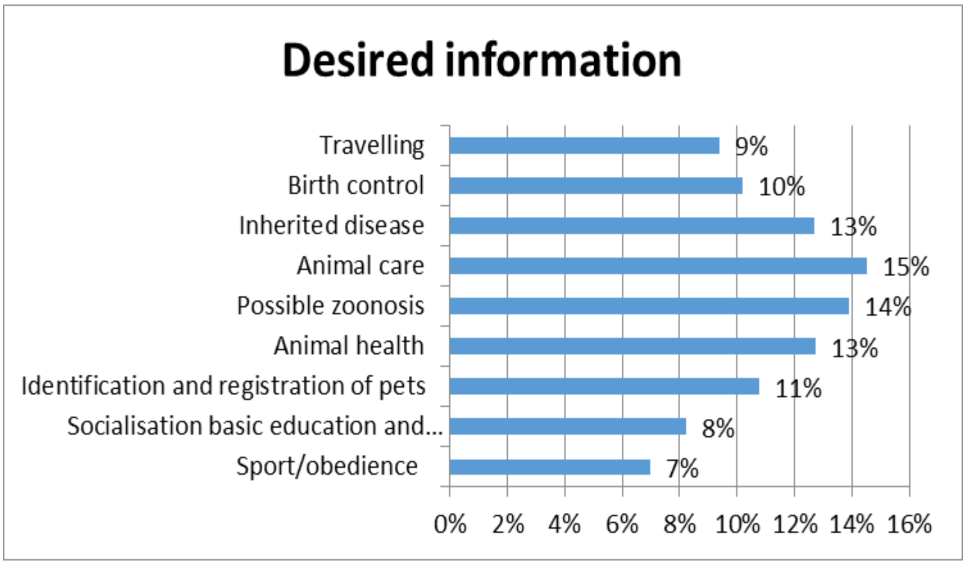
Figure 4. Percentage of dog trainers receiving training from different providers



3.2.5 Information activities for pet owners

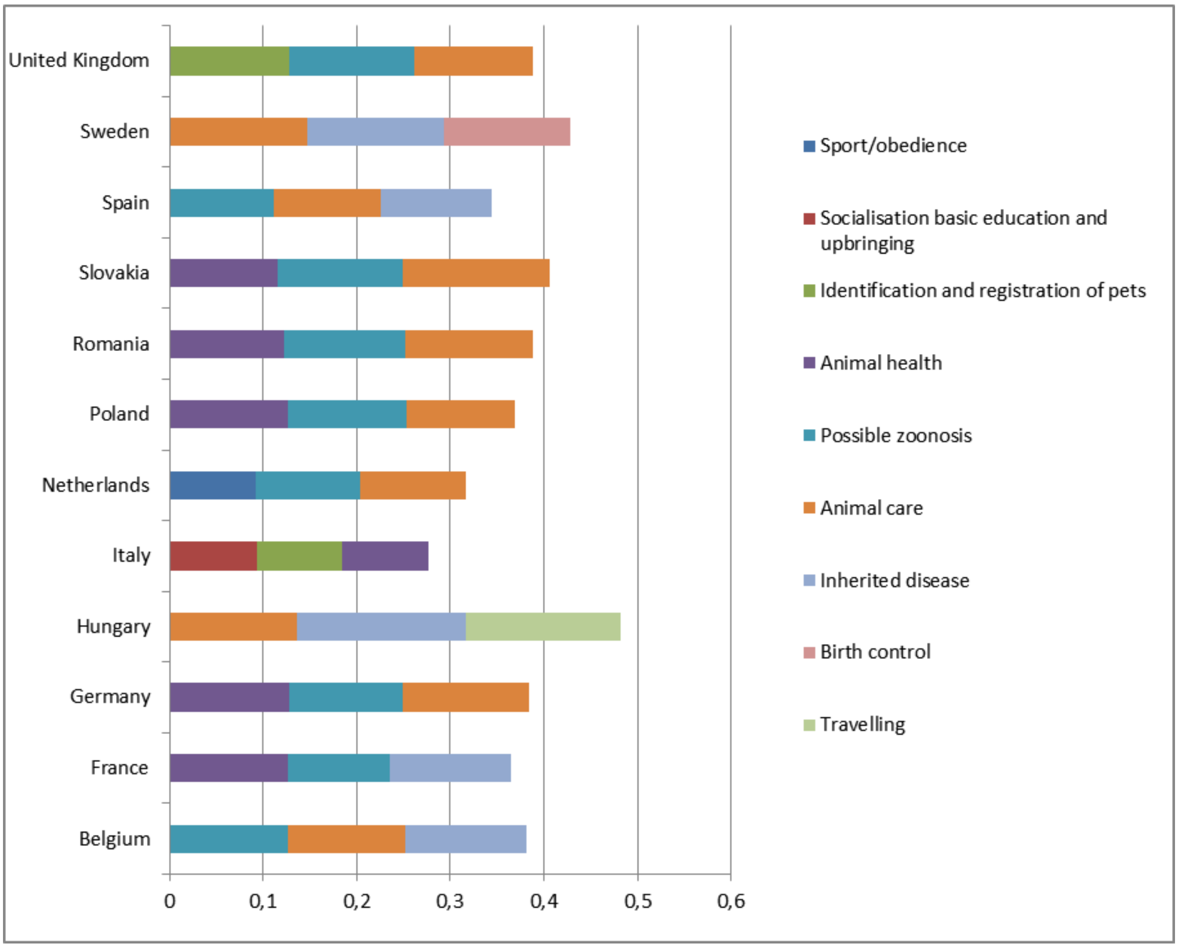
Figure 5 shows the information likely to be requested by future pet owners. Information on animal care is the most requested issue, followed by zoonoses, animal health, inherited disease, and I&R.

Figure 5. Pet owners' selection of topics of information required when buying a dog or cat



Their information needs is presented in Figure 6. Information on animal care was required by respondents in ten Member States; on zoonoses in nine, animal health in six and inherited diseases in five. Other information is a priority in only a few.

Figure 6. Information needs of pet owners



3.2.6 Conclusions on dog and cat health and welfare

National welfare legislation varies between Member States in its extent and level of implementation.

3.2.6.1 Transport

National standards on welfare during transport for commercial purposes, complying with Council Regulation (EC) No. 1/2005, are a rarity. Better implementation of existing legislation could be expected to lead to improved welfare.

3.2.6.2 Breeding and keeping

The lack of specific legislation on breeding and keeping, and varying requirements for registration of breeders and dealers in EU Member States constitutes a risk for animal welfare and can also affect the functioning of the internal market as standards are not harmonised.

3.2.6.3 Stray animals

The implementation of stray dog population management would contribute to reducing the stray population with all its consequences and reduce costs for the competent authorities. There is widespread agreement amongst stakeholders that modernization, enforcement and implementation of current national legislation are the main actions needed to address the problem of stray animals.

3.2.6.4 Training and information

Animal health, animal welfare, animal behaviour and socialisation are the most common areas on which information and training initiatives are provided to stakeholders. All categories of stakeholders received training. However, many respondents indicated that they never participated in any training activity, perhaps suggesting that available training does not address the needs of everyone.

3.3 Functioning of the EU internal market

The pet trade clearly has an impact on the functioning of the internal market of the EU. Pets are considered as goods within the provisions on the free movement of goods, enshrined in Article 28 of the Treaty on the Functioning of the EU[53]. Any commercial activity dealing with the breeding, transport, trade and retail of pets is directly affected by these principles, particularly where businesses and customers are located in separate Member States. Different standards and rules on the welfare of pets in Member States cause distortions of the internal market as the economic valuation of pets is carried out differently. High standards of pet welfare in some Member States increase prices and lead to a competitive advantage for those businesses operating in Member States with lower standards. This situation of unfair competition between stakeholders in different Member States may be considered as having an effect equivalent to restrictions on imports and exports between Member States.

Central to many EU actions within the European business environment is the belief that nothing is better for competiveness than competition itself. Economic theory perceives competition to be a social good as it stimulates efficiency gains both within enterprises and the in economy as a whole.

This improved efficiency is expressed in many ways: 1) prices charged to consumers are expected to fall as competition intensifies; 2) pressure for greater cost efficiency within enterprises; 3) greater choice of goods and services which arise as more firms enter a particular market[54].

In the dog and cat market there is a range of business operators including breeders, dealers, pet shops, pet food suppliers and veterinarians. The main issues to be considered for fair competition are: the level of compliance of national legislation with EU legislation; additional national legislation hampering intra-EU trade and international agreements on breeding pedigrees including mutual recognition of public and private certificates.

[53] Article 26 of the Treaty on the Functioning of the European Union (TFEU)
[54] Debra Johnson, Colin Turner, 2004, European Business: Policy Challenges for the New Commercial Environment, Routledge London

3.3.1 Dog and cat distribution

3.3.1.1 Legal Framework

The survey of competent authorities showed no substantial differences in implementation of relevant EU legislation[55]. However CAs noted different levels of compliance. Regarding national legislation, some Member States have additional legal frameworks for the commercial transport of dogs and cats.

3.3.1.2 Equal conditions for competition

Table 21 and Table 22 present the perceptions of different groups regarding competition at national and EU levels. Respondents included breeders, dealers, private veterinarians and veterinary organisations.

At both national and EU levels, the majority of respondents considered there to be unequal conditions for competition, as defined by a score of 1-3 in a scale from 1-7. The perception of inequality was greater at EU level than at national level. There was a striking difference between private veterinarians and their organisations. Whereas 51% of veterinarians perceived unequal conditions at national level, only 21% of their organisations shared that opinion.

Table 21. Perceptions of different groups of respondents regarding competition at national level

Do you think that you have equal conditions of competition at national level in your country?				
Score	**Breeders**	**Dog and cat dealers**	**Private veterinarians**	**Veterinary organisations**
1 (low equality)	26.0%	46.2%	28.4%	2.9%
2	10.6%	9.9%	10.1%	5.9%
3	12.2%	11.0%	12.5%	11.8%
Sub-total 1-3 (unequal)	**48.8%**	**67.1%**	**51.0%**	**20.6%**
4	16.3%	13.2%	12.0%	14.7%
5	11.6%	11.0%	13.1%	35.3%
6	10.0%	3.3%	13.6%	20.6%
7 (high equality)	13.3%	5.4%	10.3%	8.8%
Total 1-7	100%	100%	100%	100%
Number of respondents	1,010	91	457	34

[55] Council Directive 92/65/EEC amended by Council Directive 2013/31/EC, and Regulation (EC) No 998/2003 amended by Regulation (EU) No 576/2013

Table 22. Perceptions of different groups of respondents regarding competition at EU level

Do you think that you have equal conditions of competition between EU Member States?			
Score	**Breeders**	**Dog and cat dealers**	**Veterinary organisations**
1 (low equality)	39.7%	56.0%	7.7%
2	14.8%	14.3%	26.9%
3	11.5%	11.0%	30.8%
Sub-total 1-3 (unequal)	**66.0%**	**81.3%**	**65.4%**
4	15.2%	9.9%	11.5%
5	6.8%	1.1%	7.7%
6	4.5%	3.3%	15.4%
7 (high equality)	7.5%	4.4%	0%
	100%	100%	100%
Number of respondents	1,010	91	26

As a group, breeders report more equal conditions for competition at national level than at EU level.

Breeders were asked whether factors such as entry barriers when starting a business, market regulation when running a business, exit barriers when closing a business, number of competitors, or product homogeneity in terms of breeding standards had an impact on competition. Equal proportions of breeders responding indicated that these factors had both positive and negative impacts. Therefore no factors that can be considered risks for equal competition in all EU Member States could be identified.

Breeders and traders supported better enforcement and implementation of legislation to improve the current legal framework.

3.3.2 Identification & Registration

Tracing lost pets and reuniting them with their owners can improve their welfare. Traceability can also be a tool to address lack of responsible commercial practices. In order to trace dogs and cats they first have to be identified and registered. Monitoring their movements between Member States is currently difficult as there are no linked or harmonised traceability systems. Although identification and passports are compulsory for the movement of animals under Regulation (EU) No 576/2013[56], identification, registration and traceability systems are not uniform across the EU[57].

As reported in the 3050th Meeting of the Agriculture and Fisheries Council, 2010[58], these differences at legislative level may lead to a lack of control of breeding. Such control is

[56] Regulation (EU) No 576/2013 of the European Parliament and of the Council on the non-commercial movement of pet animals and repealing Regulation (EC) No 998/2003
[57] Dalla Villa, P., Messori, S., Possenti, L., Barnard, S., Cianella, M., & Di Francesco, C. (2013). Pet population management and public health: A web service based tool for the improvement of dog traceability. Preventive veterinary medicine, 109(3), 349-353.; EU dog & cat alliance: The welfare of dogs and cats involved in commercial practices: a review of the legislation across EU countries (2015)
[58] Council Conclusions on the welfare of dogs and cats, 3050th AGRICULTURE and FISHERIES Council meeting Brussels, 29 November 2010

fundamental to avoid the reproduction of animals with diseases and birth defects, and to prevent trade in animals with latent infections. The lack of control compromises both animal welfare and public health, increasing the risk of zoonoses transmission. The lack of information is also a disadvantage when carrying out epidemiological surveillance and risk analysis studies on the spread of infectious diseases, including zoonoses.

There are private initiatives to create a unique database collecting information about registered dogs (Europetnet[59]). Some Member States have compulsory databases, while others have non-compulsory databases (e.g. TASSO[60]). However, these do not cover all Member States and are not approved by all competent authorities. As a result, tracing owners, dealers and breeders cannot be guaranteed at either national or EU level. This leads to a lack of transparency in the EU market for dogs and cats.

3.3.2.1 Legal framework

Resolution 156/90[61] of the European Parliament called on Member States to introduce an obligatory I&R system for dogs, particularly to improve the control of rabies.

The competent authorities were asked to provide information on their I&R systems. Eight reported a national legal framework for dogs and four for cats (Table 25). All Member States requiring mandatory identification also required registration. The main aim of the legislation is generally to ensure animal health and welfare. However, some Member States focus on protecting the public from dangerous dogs and on stray dog control.

Table 23. Presence of a national legal framework for dog or cat I&R in case study Member States

	Case study Member States*												
	BE	**DE**	**ES**	**FR**	**HU**	**IT**	**NL**	**PL**	**RO**	**SE**	**SK**	**UK**	**Total**
Dogs	+	-	+	+	+	+	+	-	+	+	-	-**	**8**
Cats	-	+	+*	+	-	+	-	-	-	-	-	-	**4**

* In some countries, I&R is only compulsory in some regions, for example cat identification in Spain

** In England I&R of dogs will come into force in 2016

In general, the national legal frameworks have become stricter over the past 10 years. The exception is Slovakia, where I&R is no longer mandatory.

Electronic identification systems (usually referred to as transponders) are available in Member States but there is no obligation for their use unless an animal is being transported from one Member State to another. Responsibility for their application is variable and may lie with one of various bodies including public veterinary services, private veterinary practitioners and non-veterinary competent authorities.

In some Member States, responsibilities may be shared between different bodies. Furthermore, identification or registration of dogs may be the responsibility of different

59 http://www.europetnet.com/
60 http://www.tasso.net/Tierschutz
61 European Parliament 1990.Resolution 156/90 on a European Community system of dog registration. Official Journal of the European Communities, C 324,24/12/1990, L330-331.

bodies than for cats. Overall, the organisation and regulation of identification, registration and movement control of dogs and cats is variable across the EU[72].

The costs of implementation of national I&R systems are generally borne privately. For the majority, responsibilities for the enforcement of the national I&R systems are shared between national and local competent authorities. In some instances, these activities are delegated to private organisations or based on standard tools, such as checklists and guidelines.

Table 24 shows the number of bodies with responsibility for enforcement of particular elements of I&R.

Table 24. Responsibility for enforcement of I&R legislation in case study Member States

Responsible body	Number of case study Member States where each body has responsibility						
	Inspections	Audit	Sanctions	Data Reporting	Coordination of controls	Training of shelter personnel	Information and education for citizens
National competent authorities	6	2	4	5	5	2	3
Local competent authorities	8	3	6	4	4	3	3
Private organisations	1	1	1	1	0	2	3
Semi-public organisations	2	1	0	0	0	1	0
NGOs	2	1	0	1	0	1	1
Based on standard tools*	1	1	1	1	1	1	1
***Standard tools include checklists and guidelines**							

Competent authorities gave the following replies to the open question where they considered dog and cat dealers and breeders to be non-compliant as follows:

- "Not all animals are identified or registered. Private individuals and occasional breeders appear to have more infringements";
- "Some keepers think identification and registration is not necessary ";
- "Records showing age requirements at first vaccination are not respected".

France, Germany and Sweden considered there is no need to improve current legislation.

Amongst the remainder, the preferred methods to improve compliance were information and education campaigns, and better implementation and enforcement of existing standards. The preferred body to implement the suggested actions was the EU, followed by national competent authorities.

3.3.2.2 Implantation of a transponder

Opinions were collected from international producers operating in the EU and two companies responded. Both stated that owners are motivated to register their pets in order to trace lost animals and for reasons of animal welfare.

There is however no agreement between the companies on standards or the minimum technical requirements and they use manufacturers' codes rather than ISO country codes. Registration is not mandatory and there are no central databases. Lack of knowledge of some competent authorities was also an issue.

Due to the lack of harmonised databases, figures for the overall numbers of identified and registered dogs and cats are not available. The producers report that the turnover for dog transponders is bigger than that for cats. Such information was consistent with the citizens' survey, which found 82% of dogs to be identified and 77% registered. The corresponding figures for cats were 52% and 45%.

Citizens, breeder organisations, individual breeders, dealers, shelter managers and veterinarians all expressed the need for better I&R. Action on I&R was favoured more by stray dog adopters and less by those who bought their dogs from breeders. Owners with a pet that was identified or registered tended to be more in favour of action on I&R. Some stakeholders proposed national rather than local registers.

The level of owner training in husbandry was negatively correlated with the perceived need for further actions on I&R. There was also a gender effect: males were less likely than females to favour further action.

The vast majority of breeder organisations responded that information and education and technical support are necessary to improve animal welfare.

3.3.3 Illegal distribution

Illegal distribution of pets is a risk for animal welfare due to the possibility of bad keeping, breeding and transport practices. It also distorts the internal market due to unfair competition and it compromises consumer protection.

Animal and public health risks associated with illegal distribution include the introduction of rabies from endemic areas of Europe into rabies free areas. Parasites such as toxascaris, dipylidium, echinococcus and other species may be spread due to insufficient deworming. Infectious diseases such as parvovirus and distemper may spread due to lack of vaccination.

Illegal dog or puppy distribution has been investigated in several Member States, primarily by NGOs and although all stakeholders reported concern[62]. There is no reliable information available on its extent.

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[62] For the purpose of this study, illegal distribution refers to domestic sale, intra-EU trade and import/export of dogs and cats that is non-compliant with applicable national or EU legislation, leading to violation of animal health requirements applicable to intra-EU trade and/or with EU or national protection requirements during transport and/or with EU or national consumer protection and safety norms

There are many puppy farms selling dogs cheaply, under the age of 15 weeks, which are then traded with false passports and vaccination certificates and many different professions in the chain are involved[63].

The low prices undercut legitimate registered breeders producing healthy animals, who incur expenses for documents, certificates, vaccinations, health checks, housing, VAT and transport. Illegal puppy trade is therefore lucrative and possibly of substantial scale. For example, one company in Belgium involved in illegal distribution had 25 staff and an annual turnover of 1.3 million euro[64].

Belgium, the Netherlands and Romania appear to be the principal transition countries and here dealers and fraudulent veterinarians have been convicted with Italy, Germany, and the UK the main destination countries. Illegal distribution is mostly associated with dogs and much less with cats[65].

In the UK, mandatory quarantine for introduced dogs and cats ceased in 2012 and was replaced by the Pet Travel Scheme (PETS). Subsequently, there were huge increases in dog imports from Member States where puppy farms are known to exist[66]. It is suspected that a large proportion of the 12,000 dogs introduced into the UK in 2013 originate from illegal puppy farms. It has been reported that dogs introduced for non-commercial purposes are also being sold commercially.

It is estimated that up to 200,000 puppies are brought undetected into Germany and Austria annually[67]. A Dutch study estimates that 66%, or 120,000 of 180,000 puppies traded annually, are not recorded in Government statistics[68].

Under-reporting in the TRACES system is supported by information from Belgium. The Belgian database contained up to eight times more introduced dogs from countries of origin than were recorded in the TRACES database in 2012. TRACES recorded some 155,000 dogs, including 26,000 puppies, introduced into Belgium from Czech Republic, Hungary, the Netherlands and Slovakia[69].

Consumers find low prices attractive and are apparently insufficiently aware of the risks such as inherited defects, health and behaviour problems associated with the purchase of a pet from a non-reliable breeder. Many competent authorities provide sources such as flyers and advertisements on the internet and in magazines that inform consumers about the consisting risks and the illegal practices of non-registered breeders. However, the NGOs were generally not satisfied with the quality and amount of information provided on welfare and related legislation at the time of purchase and express preference for a licensing system for dealers.

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[63] The puppy smuggling scandal; DogsTrust, UK, 2014; Puppy trade in Europe, Four Paws International, 2013 ; The puppy files; NL; IFAW, 2010; http://www.esdaw.eu/trade--trafficking.html

[64] Municipality council 16-06-2014 “Animals Express” Erik Beunckens – Lijst Zellik-Relegem

[65] RSCPA, 2014; Pushing at an open door – how the present UK controls on rabies are failing;; Illegaler Welpenhandel (DE); Expert consultation (this study)

[66] RSCPA, 2014; Pushing at an open door – how the present UK controls on rabies are failing.

[67] http://www.wien.gv.at/umwelt/natuerlich/welpenhandel.html

[68] IFAW, 2010: Illegale hondenhandel (NL)

[69] Pet welfare Legislation in Belgium; Animal Welfare division; Eric Van Tilburgh; 2013

3.3.4 Conclusions for the functioning of the internal market

For the proper functioning of the market it is essential that trade is allowed to continue unimpeded. National legislation regarding trade or movement of pets is generally in accordance with EU legislation. However, compliance differs between Member States, as reported by competent authorities. Breeders declared that competition is generally unequal at the EU level, but no issue common to most or all EU Member States could be identified.

Whilst it is less common for cats dog I&R legislation exists in most countries, and the level of implementation is quite high. The number of identified pets is increasing, with most owners already identifying their dogs. A significant number of cats are identified, although in a smaller proportion than dogs.

Stakeholders see different purposes for I&R. Control of commercial operators is important for competent authorities, whereas tracing lost animals is important for consumers.

A majority of the interviewed citizens and stakeholders are dissatisfied with the current traceability system and many expressed the need for better regulation.

3.4 Protection of EU consumers

3.4.1 Legal framework

The Unfair Commercial Practices Directive[70] is a horizontal Directive which applies to all business-to-consumer transactions. It requires traders to provide consumers with information needed to take informed decisions and prohibits practices that can deceive consumers. The Directive bans all unfair commercial practices which are contrary to professional diligence and that are likely to distort the economic behaviour of the average consumer. According to this Directive, a "product" can be "any goods", including cats and dogs.

The Consumer Rights Directive[71], in application from 13 June 2014, has fully harmonised consumer's pre-contractual information rights and the right of withdrawal in distance and off-premises contracts. It covers in particular e-Commerce and delivery of online digital content. The CRD provides for a high level of consumer protection and the same time enables traders to benefit from clear and uniform rules across the EU. By now, the CRD has been transposed and is in application across the EU. This Directive defines "goods" as "any tangible movable items".

The Consumer Sales and Guarantees Directive[72] ensures consumers a minimum two-year legal guarantee for tangible goods. If a good turns out to be faulty or not to function according to the sales contract within two years from delivery, the seller must repair or

70 Directive 2005/29/EC concerning unfair business-to-consumer commercial practices, OJ L 149, 11.6.2005, p22

71 Directive 2011/83/EU of the European Parliament and of the Council of 25 October 2011 on Consumer Rights, OJ L 304, 22.11.2011, p. 64

72 Directive 1999/44/EC of the European Parliament and of the Council on certain aspects of the sale of consumer goods and associated guarantees

replace it free of charge. Under certain conditions, the consumer can also require a reduction of the price or to have the contract rescinded. Member States are free to extend the minimum two-year period of the legal guarantee. Some Member-States, such as Sweden, Finland, the Netherlands, Ireland and the UK, have used this option and introduced longer legal guarantee periods.

This Directive applies only to consumer goods, which are also defined as *"tangible movable items"*. Even if the Directive does not explicitly specify whether pet animals are covered by this definition, there is also nothing that prevents such an interpretation. The rules in the Directive can very well be applied to contracts for the purchase of animals. It should however be verified whether the national transposition law of the relevant Member State covers animals.

Six of the competent authorities, Belgium, France, Italy, the Netherlands, Spain and the UK, indicated that they have a specific national legal framework on consumer protection when purchasing dogs or cats.

Table 27 shows specific areas indicated by competent authorities covered by national legislation on consumer protection at the time of purchase for five countries which provided the information.

Table 25. National legislation areas on consumer protection of dogs or cats in case study countries

Area of consumer protection	Member State legislation				
	BE	FR	IT	NL	UK
Genetic diseases	-	+	+	+	-
Compliance with breed standards	-	+	+	-	-
Health	+	+	+	-	-
Fraud	+	+	+	-	+
Warranty	+	+	+	-	-
Other	-	-	-	-	+

The content of the national legislation differs between Member States. For example: Belgium has specific legislation on the acquisition of pets; France has regulations on latent defects of animals; Italy, the Netherlands, Spain and the UK have more general laws on consumer protection with additional laws on the health and welfare of companion animals.

In Belgium, breeders and pet shops have the duty to provide the buyer of a cat or a dog with a warranty certificate. Breeders have to deliver a ‘product’ conforming to the contract. The warranty is for two years or more from the date of purchase. The law makes a distinction depending on the date of appearance of the defect. When the defect is reported less than six months after purchase, the consumer has to prove that the defect appeared after the purchase. When the defect is reported more than 6 months after purchase then the consumer has to prove that the defect already existed before the purchase[73].

In France, the law on consumer protection is included in the Civil Code (*Code Civil; Protection du consommateur*). In the *Code Rural* there are additional warranties mentioned when acquiring a dog or cat. It is forbidden to sell a dog or cat suffering from infectious diseases (Code Rural; Article R223)[74]. Furthermore, for dogs the following latent defects (‘*vices rédhibitoires’*) are specifically mentioned in Code Rural, Article R213-1 and following: canine distemper, infectious canine hepatitis, parvovirus, hip dysplasia, cryptorchism, and progressive retina dystrophy. For the cat, feline panleucopenia, infectious peritonitis, FeLV and FIV. Thus, breeders can only sell animals that are free of diseases that are listed in the law. Other genetic or health defects are not covered.

In Italy, consumers are protected by the Civil Code, which regulates the purchase of all animals in general, and also includes the purchase of dogs and cats. However, it considers animals as a “goods”. Italy has general provisions to protect consumers from vices, including in the sale of animals, but these are not explicitly detailed. The Civil Code states that: ‘the seller is obliged to guarantee that the object sold is free from defects which make it unsuitable for the usage to which it is destined or that decrease the value of it in an appreciable way’. Therefore, consumers in Italy have no specific dog or cat health guarantees and must rely on general consumer protection rules.

In the Netherlands, there is a general law on consumer protection (Wet Handhaving Consumentenbescherming). Although there is a new law on companion animals (Besluit Gezelschapsdieren, 17 juni 2014), this is essentially focused on the well-being of the animal. It does require that a seller provides the buyer with “all relevant information regarding the health status of the animal, and minimally the vaccination status” (Art. 3.17, 3.18). Breeders are responsible for genetic disease suffered by animals sold to consumers. In Spain, consumer protection is based on the general law[75] approving the revised text of the General Law for the Protection of Consumers and Users and other complementary laws. In 2009 additional legislation was adopted that provides more rules on animal protection, animal care and conservation of species[76]. It specifies holdings, identification requirements and other provisions, but there is no specific legislation on how the breeders are responsible for consumer protection.

In the UK, consumers are generally protected by the Sale of Goods Act 1979. Live animals are classified as “goods”, and the act covers rights of consumers.

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73 Koninklijk besluit van 27 april 2007 houdende erkenningsvoorwaarden voor inrichtingen voor dieren en de voorwaarden inzake de verhandeling van dieren/Arrêté royal du 27 avril 2007 portant les conditions d'agrément des établissements pour animaux et portant les conditions de commercialisation des animaux

74 Code Rural Partie Législative Section 1: Les vices rédhibitoires Article L213-1(Décret nº 89-804 du 27 octobre 1989 Journal Officiel du 4 novembre 1989) (Ordonnance nº 2000-914 du 18 septembre 2000 art. 5 I Journal Officiel du 21 septembre 2000); Code Rural Partie réglementaire Décret n° 2003-768 du 1er août 2003 relatif à la partie Réglementaire du livre II du code rural Journal Officiel n° 181 du 7 août 2003 page 37235

75 Real Decreto Legislativo 1/2007, de 16 de noviembre, por el que se aprueba el texto refundido de la Ley General para la Defensa de los Consumidores y Usuarios y otras leyes complementarias (Royal Legislative Decree 1/2007 of 16 November)

76 Ley 29/2009, de 30 de diciembre, por la que se modifica el régimen legal de la competencia desleal y de la publicidad para la mejora de la protección de los consumidores y usuarios (Law 29/2009, of December 30, amending the law relating to unfair competition and advertising to improve the protection of consumers)

Some information was also provided by countries not in the target group. In Ireland, the Animal Welfare Acts of 2006 and 2011 impose legal duties on pet owners including sellers to ensure the welfare of their dogs or cats. The Breeding of Dogs Act 1973 and the Breeding and Sale of Dogs (Welfare) Act 1999 Art 8, and 9 mention sales of dogs but the focus is on adequate registration and does not contain legislation specifically protecting consumers in relation to purchase.

In Latvia and Lithuania, breeders are by law not allowed to sell animals with certain latent defects to consumers[77].

Table 28 shows how competent authorities in the case study Member States evaluated the level of compliance with national legislation on consumer protection in their country.

Table 26. Evaluation of level of compliance with national legislation on consumer protection

	Case study Member State											
	BE	**DE**	**ES**	**FR**	**HU**	**IT**	**NL**	**PL**	**RO**	**SE**	**SK**	**UK**
Level of compliance*	high	low	low	high	low	NA	high	low	low	low	low	low
***Scoring of 1-2= low level of compliance, 3-4=moderate, 5-6=high; 7= full compliance, NA= not available**												

Interestingly most countries reported a low compliance, suggesting that consumer protection deserves more attention. Belgium, France and the Netherlands reported high compliance, although there is no further data to substantiate this.

3.4.1.1 Consumer behaviour

Consumer behaviour, as reflected in the responses to the citizen questionnaires, does not differ markedly between Member States. Differences in legislation appear to have no influence on this finding.

The citizens' survey found that consumers who had bought an unhealthy animal were more likely to go back to the breeder than contact a consumer organisation or start a legal procedure. The same pattern of behaviour occurred when consumers found they had bought an animal with a hereditary defect.

However, consumers were generally not satisfied with the way their complaint was handled. These findings highlight the responsibility of breeders to ensure their animals meet the required specifications when sold.

3.4.1.2 Risks for consumer protection

From the literature, stakeholder interviews and questionnaires, the following conclusions can be drawn with regard to consumer protection legislation:

[77] The welfare of dogs and cats involved in commercial practices: a review of the legislation across EU countries. EU dog and cat alliance; 2015

- Buyers are required to report any non-conformity within a few months after purchase. However, many genetic disorders may not become apparent within a few months after buying a puppy or kitten[78]. Thus, a six month period is not adequate for genetic disorders.

- Very often the law only applies when the consumer has purchased an animal from a registered seller. The consumer should be protected when purchasing from any seller.

- When health problems arise later than 6 months after purchase, the consumer (not the seller) needs to substantiate that the 'consumer good' did not meet the desired health status at the time of the purchase. This is very difficult for genetic diseases, behavioural disorders and infectious diseases or health problems, because specific health guarantees or specifications are usually not provided at purchase. All sellers may provide information that the animal has been dewormed and vaccinated, and some breeders associations require their breeders to prove absence of certain diseases, but this is not standardised for all breeders. For consumers it is difficult to know if all disease risks are covered for at the moment of purchase, and when problems occur, to prove that genetic diseases, behavioural disorders or infectious diseases already existed at the time of the purchase.

- The weak position of consumers leads to a lack of compensation. Consumers may need to initiate legal action to claim their rights. However legal action can involve substantial costs.

Competent authorities responded differently when asked if current legislation to protect consumers when buying a pet needs improvement. France and Sweden did not support further action, whereas Belgium, Hungary and Romania considered there is a need for more regulation. Belgium, Hungary and the UK favoured more technical support and provision of information and education to consumers.

The majority of citizen respondents called for the EU to take action in the area of consumer protection. Individual breeders were divided over the actions to be taken but they considered proper enforcement as important.

The overwhelming majority of veterinarians indicated that additional actions are necessary to improve consumer protection at the time of purchase. Views differed on how this should be achieved but included: information, education and better enforcement of current legislation. Most believed that national competent authorities should be responsible for actions on consumer protection. Over half of the veterinarians favouring information and education were of the opinion that veterinarians themselves should be responsible for providing this.

78 Breed predispositions to disease in dogs and cats. A. Gough and A Thomas, Blackwell Publishing, 2004; ISBN 1-4051-0748-0

3.4.2 Information and education on welfare

3.4.2.1 Activities of national competent authorities

Competent authorities reported that they actively promote, develop and implement welfare information and education activities. Table 29 presents activities provided by some competent authorities.

Table 27. Information and education activities of competent authorities

Competent Authority	Target groups	Information and education topics
Belgium	Shelter managers	Trade practices, I&R, housing, feeding and watering, zoonoses, behavioural needs.
	Pet dealers, CA officials	Behavioural needs
	Citizens	Behavioural needs, birth control
Hungary	Any groups	Trade practices, I&R, husbandry, behavioural needs, abuse, animal health, zoonoses, birth control, breeding and consumer protection at the time of purchase.
Italy	Semi-public organisation staff, CA officials	Trade practices, housing
	Dog trainers	Trade practices, I&R, housing, husbandry
	Breeders	I&R
	Transporters	I&R, husbandry
	Citizens	Trade practices
	Veterinarians	Housing, husbandry
	Shelter managers	Husbandry
Netherlands	Citizens	Training on housing, animal health, birth control. Information on trade practices, I&R, housing, husbandry, abuse, zoonoses, breeding, consumer protection
Sweden	All groups except dealers	Trade practices
	Breeders, veterinarians, shelter managers, CA officials, citizens	Zoonoses, birth control, breeding
	Any groups	I&R, housing, husbandry, feeding and watering, abuse, animal health

3.4.2.2 Citizens' knowledge and awareness of welfare issues

In the Netherlands, a 2006 study found that dog purchasers prepare themselves significantly better for their acquisition than cat purchasers. Books, internet, and family and friends are the most common sources of information[79].

The citizen survey found that purchasers paid most attention to housing and veterinary treatments, such as vaccinations, deworming and health checks. The least important considerations were the purchase price and maintenance costs.

[79] Dieren gedownload; Platform Verantwoord Huisdierenbezit (PVH), Hogeschool Van Hall Larenstein, Projnr. 364117, 2006

Similarly, dealers and breeders both reported that prospective owners pay most attention to housing, behaviour and veterinary treatments when purchasing. Whereas they indicated that least attention was paid to maintenance costs and pedigree certificates.

The lack of attention to maintenance costs when purchasing is particularly relevant and financial problems were found to be the most common reason for giving up dogs for adoption[80]. This finding suggests that consumers may underestimate the costs of keeping a pet.

3.4.2.3 Welfare information at the time of acquisition

This study found that less than a fifth of prospective owners reported being well informed about travelling with pets, exercise, obedience training and intra-EU trade. A similar situation applied with regard to heritable diseases, consumer rights and zoonoses. Swedish purchasers were somewhat better informed about heritable diseases, although they were still a minority.

The situation was very much the same with regard to consumer rights. Less than 20% of purchasers in the Member States apart from Germany and Sweden reported being well informed.

Consumers purchasing from a hobby or professional breeder received the most information, followed by owners who had adopted. Those buying from pet shops or online received the least information. Adoption organisations were reported to provide most information on I&R.

NGO respondents considered that purchasers receive a low level of appropriate and accurate welfare information. The assessment of NGOs on a number of such issues is shown in Figure 7.

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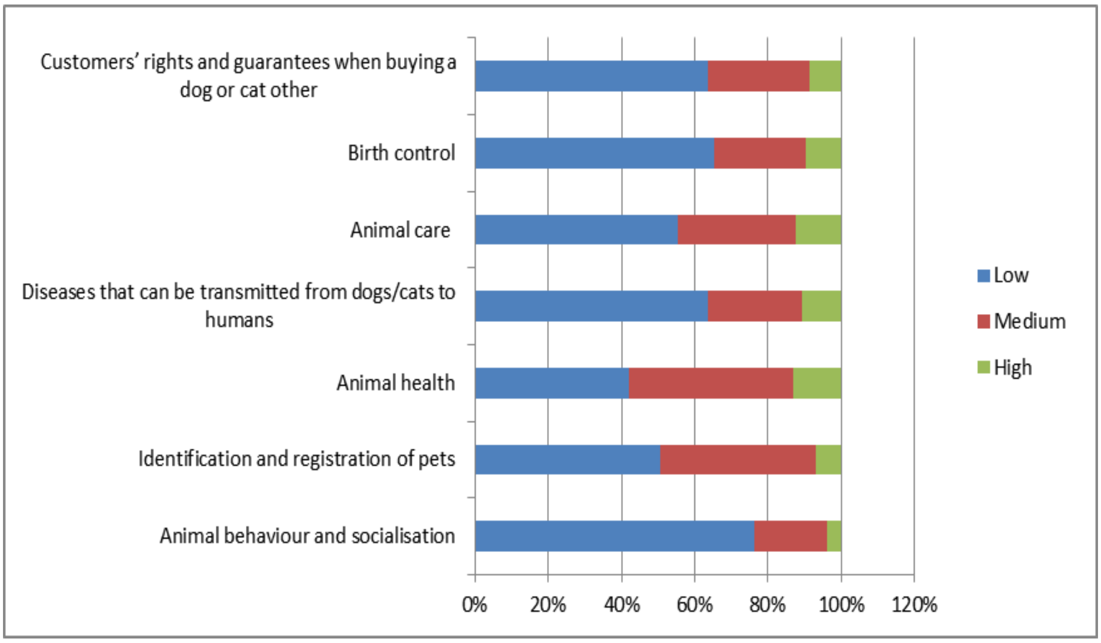
80 Vučinić, M., Đorđević, M., Teodorović, R., Janković, L., Radenković-Damnjanović, B., & Radisavljević, K. (2009). Reasons for relinquishment of owned dogs in a municipal shelter in Belgrade. *Acta veterinaria*, *59*(2-3), 309-317.

Figure 7. Quality of welfare information received by purchasers as reported by NGOs



3.4.2.4 Examples of European initiatives on welfare

The EU Better Training for Safer Food (BTSF) training programme[81], provides training in the areas of import, commercial and non-commercial movements of dogs and cats. The BTSF training initiatives on animal welfare currently mainly focus on livestock (farming of pigs and poultry, slaughter, killing for disease control and transport) and zoo animals.

The European Commission organises and supports other information activities, such as the “Improving animal welfare in shelters” session at the Animal Welfare Workshop in Warsaw in 2014[82] and the conference in 2013 on "Building a Europe that cares for companion animals"[83]. Also, TAIEX initiatives cover relevant issues, namely stray dog population control[84].

The Commission supports the work developed by the World Organisation for Animal Health (OIE) that has adopted international standards for stray dog population control[85]. The OIE coordinates activities through a platform on Animal Welfare for Europe. This platform aims to improve the practical application of OIE standards through several measures over a three year period between 2014 and 2016.

The Commission is also active in promoting and encouraging good practices on companion animal welfare and cooperates with other organisations in the development of the "CARODOG" [86] and "CAROCAT" [87] website, an informative platform aiming at promoting responsible animal ownership as a fundamental precondition for a pet friendly society.

As well as animal welfare organisations, others including charities and institutions provide welfare information. Two examples are the Puppy Awareness Week by the Kennel Club and toolkits for owners made by the Pet Food Manufacturers Association (PFMA).

Examples of education initiatives in Member States are the Blue Dog project[88] and those provided by national NGOs. These include the Queen Sophia Society for the Protection of Animals in the Netherlands and “Schule und Tierschutz” in Germany.

There are no school programmes organised by national governments, although the schools acts (Schulgesetze) of the German states, such as in North Rhine/Westphalia, mention education concerning responsibility towards animals.

3.4.3 Public Health

Dogs and cats can give rise to zoonotic infections in humans. Directive 2003/99/EC stipulates the monitoring of zoonoses by Member States and other countries[89] and Annual Community

81 http://ec.europa.eu/chafea/food/index.html
82 http://ec.europa.eu/dgs/health_consumer/information_sources/ahw_events_en.htm, retrieved on 8 December 2014
83 http://ec.europa.eu/dgs/health_consumer/information_sources/ahw_events_2013_en.htm, retrieved on 8 December 2014
84 http://ec.europa.eu/enlargement/taiex/index_en.htm
85 http://www.oie.int/index.php?id=169&L=0&htmfile=chapitre_aw_stray_dog.htm
86 http://www.carodog.eu/.
87 http://carocat.eu/
88 http://www.thebluedog.org/en/
89 Directive 2003/99/EC on the monitoring of zoonoses and zoonotic agents

Summary Reports (CSR) are published.[90] Although most data refers to zoonotic agents in food and food-producing animals, some refers to zoonotic risks like rabies and Echinococcosis in non-food animals.

It is known that 60% of all human infectious diseases originate from animals, and the proportion is even higher for emerging infectious diseases[91]. Human infection from pets can easily occur due to close contact. This is the reason why zoonoses have an importance in the 'One Health' concept.

3.4.3.1 Legal framework concerning public health

The only EU legislation concerning zoonoses in dogs and cats is Council Directive 92/65/EEC and Regulation (EU) No 576/2013.

Council Directive 92/65/EEC, lays down animal health requirements governing trade in and imports into the Community of animals, semen, ova and embryos not subject to animal health requirements laid down in specific Community rules referred to in Annex A (I) to Directive 90/425/EEC.

Regulation (EU) No 576/2013 applies to the non-commercial movement of pet animals.

3.4.3.2 Important dog and cat zoonoses

Rabies and Echinococcosis are the only dog and cat zoonoses that are regulated at EU level. Rabies in dogs is the most important reservoir for humans. About 35,000 humans are infected every year following a dog bite. Over the last 25 years the incidence of rabies in many areas of Europe has been eradicated or at least significantly decreased but the disease is remains endemic in limited areas[92].

Echinococcus multilocularis can cause alveolar echinococcosis in humans, which if untreated has potentially fatal consequences. In Europe, the final hosts are foxes, dogs and cats. Echinococcus multilocularis is endemic in some areas[93].

The CALLISTO project has identified "paradigmatic" pathogens that pose the highest risks for human health in Europe. These diseases are: rabies, Crimean-Congo haemorrhagic fever virus, cowpox, hantavirus, lymphocytic choriomeningitis, Campylobacter jejuni, Leptospira interrogans, Salmonella enterica, Bartonella henselae, Chlamydophila psittaci, Escherichia coli producing extended spectrum beta-lactamase, Echinococcus granulosus, Leishmania infantum, Toxoplasma gondii, Echinococcus multilocularis and Giardia genotypes.

3.4.3.3 Zoonotic risks

There are various zoonotic risks associated with illegal distribution. These include particularly the introduction of rabies from endemic parts of Europe into countries that are

[90] http://www.efsa.europa.eu/en/efsajournal/doc/3991.pdf
[91] Jones KE, et al. Global trends in emerging infectious diseases. Nature. 2008. Feb 21;451(7181):990–993
[92] Cliquet F. Rabies in Europe: what are the risks? Expert Review of Anti-Infective Therapy, 2014, 12(8):905-8
[93] http://www.esccap.org/parasites/Endoparasites/1/ retrieved on 1 June 2015

rabies free. Another risk is the spread of enteric parasites, particularly toxascaris, dipylidium and echinococcus species, due to insufficient deworming.

Stakeholders also mention animal movement and differences between national or regional welfare rules[94] as risks for the occurrence and spread of zoonoses.

3.4.3.4 Citizen awareness

In general, citizens are not very concerned about catching a disease from a family dog or cat. The low level of concern might indicate lack of knowledge. However, the survey found that low proportions of respondents caught a disease from their family pet.

In general, citizens indicated that they received very little, if any, information on zoonoses although when asked what topics they would like to know more about, it was high on the list.

There are many websites that provide information for consumers about zoonoses but they rarely mention preventive measures. A number of pet food industry-sponsored, school educational packages do mention that animals can carry diseases and that basic hygiene rules need to be followed after contact.

The CALLISTO project states: *"Education can play an important role in teaching people about the risks, how and which diseases can be transmitted and what preventative measures can be taken."* However, it may be difficult to persuade pet owners to implement preventive measures, when many have kept pets all their lives without apparent harm (open seminar 2014 CALLISTO). Therefore, the CALLISTO team specifically mentions educating children, since influencing their behaviour provides benefits far into the future.

3.4.3.5 Conclusions on consumer protection

Consumer protection regarding pet purchases is based on the general consumer protection laws, where pets are considered as 'goods'. National legislation focuses on animal welfare rather than protecting consumers who purchase an animal in bad health status with potential hereditary diseases. In Belgium for example, the mandatory warranty certificate provides more protection than in other Member States when purchasing from breeders or pet shops.

When buying a pet the topics most discussed are animal health and I&R. When asked about any useful communication campaigns that could be launched, animal health and responsible ownership proved most popular. Prospective owners were poorly informed about travelling with pets, hereditary diseases, consumer rights and zoonoses. Consumers are poorly informed on the subject and possible preventative measures. NGOs and veterinary practitioners dedicate most of their effort towards owners on these topics.

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[94] Council Conclusions on the welfare of dogs and cats, 3050th AGRICULTURE and FISHERIES Council meeting Brussels, 29 November 2010.

4 CONCLUSIONS

The study identified four main areas of concern which could potentially place at risk the welfare and the health of dogs and cats.

Breeding

National laws on animal welfare directed at dogs and cats are implemented in the majority of the Member States. These however are not equally stringent and there is concern regarding the variable level of compliance. In addition, the system of registration and licensing of breeders and dealers is also considered inconsistent between Member States.

Transport

It is known that animals may suffer stress when transported and European legislation has been developed to minimise this risk. All Member States adhere to the rules and a small number have introduced additional protection for animals in transit. The systematic identification, registration and control of the movement of animals would facilitate the collection of data and ensure a more transparent market.

Lack of knowledge and information for the keeping of pets

When purchasing an animal, consumers can be woefully lacking in knowledge about the level of responsibility they are about to undertake and are unaware of the costs, often significant, of keeping an animal. Indeed, less than 20% of purchasers in reported being well informed about animal welfare and health at the moment of purchase. Appropriate information on the health and welfare of the animals and on consumer rights at the time of purchase could be of help to improve the situation.

Discrepancies in market data of pets

It is estimated that every month around 46,000 dogs are traded between EU Member States, for a total value of more than 5.5 million euro per month. This compares starkly with the registrations in the Commission's TRACES system which in one year (2014) registered a total of 20,779 dogs and 2,287 cats involved in intra-EU trade. The considerable difference between these figures is a matter of concern as the health risks to both animals and humans are considered significant. These concerns have been fuelled by the rapid rise of internet trading where the chain of purchase and delivery of pets cannot easily be traced. In recent reported cases falsification of pet passports or health certificates have been responsible for misleading purchasers of pets as to their origin, age, lineage and health status

Consumer protection

Under EU legislation dogs and cats are considered 'goods'. Following a purchase consumers are granted a period of 6 months during which complaints of defects can be raised. Many individuals and organisations consider this inappropriate since genetic disorders would not necessarily become apparent within such a time-scale.

Two concerns are common to all of these issues raise. First that the current legislation should be better enforced. Second, that an exchange of knowledge between Member States would be of considerable benefit. Such exchange could include science-based animal welfare indicators to facilitate welfare assessment and best practices covering a wide variety of subjects. This would help improve the enforcement of legislation and the general approach to the health and welfare of animals.

Documents such as self-assessment tools, checklists and guidelines could help EU citizens and encourage better animal care and foster responsible ownership.

ANNEXES

ANNEX 1: DETAILED DESCRIPTION OF THE RESPONDENTS OF THE CITIZENS' QUESTIONNAIRE

Citizens

The vast majority of citizen respondents were female (88%). The 25-39 age group was over-represented, comprising 36% of the sample in the questionnaire compared to 25% in the EU population. The 40-54 age group was also over-represented (31% of the respondents compared to 26% of the population). The over 55 age group was under-represented (14% of respondents compared to 36% of the population)[95].

Most of the respondents were employees employed (57%). The remaining 43% included those who were self-employed (15%), students (11%), unemployed (9%) and retired (8%).

In most countries, an income of 15,000-30,000 euro per year is the most common (20-35% of respondents). Swedish citizens reported the highest percentage of income between 30,000 and 60,000 euro (25%). In Hungary, Poland, Romania, Slovakia and Spain most respondents (30-58%) indicated that their income falls in the 0-15,000 euro category.

Respondents were equally distributed between living in a rural area, living in a small to medium town and living in a large city. Most people (50%) indicated that their household consisted of 2 people. Households with 1, 3 and 4 persons represented 15% of the sample. Only 5% indicated that their household contained more than 4 persons. The average age at which people stopped full-time education was 22.6 years (range 20.8-25.4 between case study countries)[96]. Approximately 30% of respondents are members of a welfare organisation.

Pet owners represented the majority of citizen respondents: 71% were dog owners and 45% cat owners, while 31% of respondents owned both a dog and a cat. In the EU, 13% of all citizens own a dog and 15% a cat. However it is to be expected by the nature of the survey that dog and cat owners will be more interested in responding to the survey than other citizens. Young employed females owning a dog or cat represented the most common profile of respondents to the citizen questionnaire.

[95] Eurotat, access: Dec 2014
[96] Excluded answers below 12 and above 80 (485 Q)

Age groups of citizen respondents

	Total no of replies	%	How old are you?					
			%0-14	%15-24	%25-39	%40-54	%55+	% missing
Belgium	1,897	10.0	0.0%	15.0%	41.2%	33.1%	10.8%	0.0%
France	493	2.6	0.0%	5.1%	26.8%	32.3%	35.9%	0.0%
Germany	3,934	20.0	0.0%	12.5%	34.8%	37.5%	15.3%	0.0%
Hungary	300	1.6	0.0%	17.7%	54.0%	19.3%	9.0%	0.0%
Italy	2,446	12.9	0.0%	9.9%	35.7%	38.8%	15.7%	0.0%
Netherlands	947	5.0	0.0%	10.0%	34.3%	38.8%	16.9%	0.0%
Poland	2,493	13.2	0.0%	33.0%	42.9%	17.7%	6.4%	0.0%
Romania	528	2.8	0.0%	8.9%	50.8%	29.0%	11.4%	0.0%
Slovakia	374	2.0	0.0%	20.3%	52.4%	22.2%	5.1%	0.0%
Spain	2,653	14.0	0.0%	10.4%	42.5%	34.5%	12.6%	0.0%
Sweden	896	4.7	0.0%	12.8%	32.0%	35.7%	19.4%	0.0%
UK	617	3.3	0.0%	5.0%	21.6%	37.0%	36.5%	0.0%
UNKNOWN	1,348	7.1	0.0%	9.5%	29.2%	36.3%	24.9%	0.0%
Total	**18,926**							

Pet ownerships of citizen respondents

ownership	No	%
Dog & Cat	5,544	29.3
Dog	7,436	39.3
Cat	3,821	20.2
Non-owner	998	5.3
Unknown	1,127	6.0
Total	**18,926**	

Gender of citizen respondents

	M	F	N/A
Belgium	11%	70%	18%
France	12%	65%	23%
Germany	7%	69%	24%
Hungary	9%	62%	29%
Italy	10%	63%	27%
Netherlands	7%	71%	22%
Poland	5%	66%	28%
Romania	10%	66%	23%
Slovakia	7%	67%	26%
Spain	11%	67%	21%
Sweden	5%	73%	22%
UK	11%	65%	24%

Age when citizen respondents stopped full-time education

	Average	Standard deviation
Belgium	21.9	9.4
France	22.4	10.4
Germany	22.0	10.7
Hungary	22.3	10.8
Italy	21.5	10.3
Netherlands	22.7	10.9
Poland	24.0	11.8
Romania	25.4	12.4
Slovakia	22.0	10.3
Spain	22.9	10.4
Sweden	25.2	12.4
UK	20.8	10.0

Employment status of citizen respondents

	Employee	Retired	Self-employed	Student	Unemployed	Missing
Belgium	57.9%	3.7%	7.3%	7.8%	4.7%	18.6%
France	38.1%	16.4%	13.6%	2,8%	5.7%	23.3%
Germany	48.0%	5.3%	11.2%	8.0%	3.1%	24.3%
Hungary	45.3%	3.3%	9.0%	9.0%	4.0%	29.3%
Italy	35.5%	3.8%	15.1%	7.6%	10.6%	27.3%
Netherlands	43.9%	5.8%	11.5%	7.0%	9.3%	22.5%
Poland	37.8%	2.1%	7.9%	18.5%	5.1%	28.5%
Romania	51.1%	4.2%	11.0%	5.9%	4.5%	23.3%
Slovakia	44.4%	1.3%	10.4%	13.4%	4.5%	25.9%
Spain	42.8%	3.0%	12.5%	7.8%	12.6%	21.4%
Sweden	43.2%	10.3%	8.0%	12.3%	4.4%	21.9%
UK	34.2%	19.6%	15.7%	2.4%	4.1%	24.0%

Yearly income level of respondents (2014)

Euro	0-15,000	15-30,000	30-60,000	60-90,000	<90,000	None	Missing
Belgium	13.9%	34.8%	18.7%	3.8%	1.7%	8.1%	19.1%
France	18.7%	29.4%	19.3%	2.4%	1.2%	5.3%	23.7%
Germany	22.0%	23.0%	18.5%	3.1%	1.8%	6.2%	25.4%
Hungary	39.0%	9.3%	5.3%	1.7%	1.0%	14.0%	29.7%
Italy	23.4%	24.7%	7.3%	1.0%	0.5%	14.7%	28.5%
Netherlands	21.8%	22.5%	20.0%	3.0%	1.1%	8.1%	23.7%
Poland	39.8%	12.0%	2.5%	0.6%	0.4%	15.9%	28.7%
Romania	57.4%	6.3%	4.4%	0.8%	0.0%	7.8%	23.5%
Slovakia	47.9%	11.2%	3.5%	0.5%	0.3%	10.2%	26.5%
Spain	30.6%	25.9%	8.2%	0.8%	0.5%	12.1%	21.9%
Sweden	21.0%	24.6%	25.4%	2.7%	1.1%	3.0%	22.2%
UK	20.7%	26.4%	16.5%	4.7%	1.8%	4.9%	25.0%

Rural/ city dweller

	LARGE TOWN	SMALL/MIDDLE TOWN	RURAL	MISSING
Belgium	16.61%	26.78%	38.22%	
France	16.63%	32.05%	28.19%	
Germany	19.40%	27.73%	28.77%	
Hungary	36.00%	24.33%	10.00%	
Italy	16.80%	32.17%	23.79%	
Netherlands	17.85%	34.74%	25.45%	
Poland	35.50%	22.34%	13.76%	
Romania	58.90%	14.02%	3.98%	
Slovakia	30.21%	26.20%	17.91%	
Spain	31.89%	30.98%	15.76%	
Sweden	22.54%	31.36%	24.22%	
UK	21.23%	26.58%	28.20%	
UNKNOWN	3.71%	4.30%	4.53%	
Total	**23.2%**	**26.4%**	**21.9%**	**28.5%**

Household composition of citizen respondents

Persons	**1**	**2**	**3**	**4**	**>4**	**MISSING**
Belgium	12.4%	36.4%	15.2%	12.5%	4.8%	18.7%
France	21.7%	33.3%	10.1%	7.1%	4.5%	23.3%
Germany	15.8%	39.7%	11.9%	6.3%	2.1%	24.2%
Hungary	11.0%	33.7%	12.7%	7.0%	6.3%	29.3%
Italy	12.2%	30.5%	15.0%	12.2%	2.9%	27.2%
Netherlands	19.9%	42.0%	7.7%	5.9%	2.4%	22.1%
Poland	6.6%	26.2%	19.0%	14.2%	5.7%	28.4%
Romania	11.4%	34.5%	16.1%	11.6%	3.6%	22.9%
Slovakia	6.7%	28.6%	19.0%	14.7%	5.3%	25.7%
Spain	11.1%	35.2%	17.1%	11.9%	3.4%	21.3%
Sweden	23.3%	33.0%	11.2%	7.8%	2.7%	22.0%
UK	16.5%	40.7%	10.0%	6.0%	2.6%	24.1%
UNKNOWN	2.1%	5.6%	2.2%	1.9%	0.7%	87.5%
Total	**12.49%**	**32.54%**	**13.54%**	**9.58%**	**3.33%**	**28.50%**

Citizen respondents who have a child under 5 years old in household

	Yes	No	Missing
Belgium	8.5%	72.9%	18.7%
France	5.1%	71.6%	23.3%
Germany	4.6%	71.2%	24.3%
Hungary	5.0%	65.3%	29.7%
Italy	4.3%	68.4%	27.3%
Netherlands	3.8%	74.3%	21.9%
Poland	5.9%	65.8%	28.3%
Romania	6.6%	70.5%	22.9%
Slovakia	6.4%	67.9%	25.7%
Spain	6.5%	72.0%	21.4%
Sweden	4.1%	74.0%	21.9%
UK	3.4%	72.3%	24.3%
UNKNOWN	0.7%	11.6%	87.6%
Total	**5.10%**	**66.33%**	**28.57%**

Citizen respondents who are member(s) of a welfare organisation(s)

	Yes	No	Missing
Belgium	29.26%	52.29%	18.45%
France	40.37%	36.31%	23.33%
Germany	34.04%	41.76%	24.20%
Hungary	23.00%	47.67%	29.33%
Italy	29.19%	43.58%	27.23%
Netherlands	44.46%	33.69%	21.86%
Poland	15.80%	55.84%	28.36%
Romania	18.94%	58.14%	22.92%
Slovakia	13.37%	60.96%	25.67%
Spain	45.83%	32.83%	21.33%
Sweden	24.44%	53.68%	21.88%
UK	34.68%	41.33%	23.99%
UNKNOWN	4.23%	8.23%	87.54%
Total	**29.31%**	**42.20%**	**28.49%**

Breeder associations, breeder organizations and breeders

Of the 67 breeder associations that replied to the questionnaire, 72% were involved in dog breeding, and 28% in cat breeding. Three breeder associations are active throughout the EU, of which one indicated that it also operated internationally (i.e. outside of the EU).

Among the 2,020 breeders who indicated their country of origin, 87% were hobby breeders and 13% were professional breeders[97]. Just 5% of respondents from the case study countries indicated that breeding is their main source of income. More than 75% indicated that they breed less than 10 animals per year, 18% breed 10-20 animals per year and only 7% breed and sell more than 20 animals per year. Forty four per cent of the responding breeders primarily breed dogs and 56% primarily breed cats.

Private veterinarians and veterinary organizations

Of the 1,071 responding veterinarians, 88% indicated that the main area of specialism within their practice is companion animal medicine (meaning they dedicate more than 40% of their daily work at the practice to dogs and cats). Just 2% of practices specialise in horses and 10% in food producing animals. Veterinarians that work less than 40% of their time with dogs and cats were not included in the study analysis. 28 veterinary organisations participated in the survey.

Pet dealers

Among the 588 dealers who filled in the survey, 13% indicated themselves as pet-stores, 11% as brokers, 4% as wholesale dealers and 72% as other. Participants were primarily of Belgian and German nationality (28% and 25% respectively). There is no opinion difference between different types of dealers (broker, pet-store, wholesales dealer and others) and those who sell dogs or cats. The number of animals sold per year (dimension of business) did not influence the answers provided by respondents.

Dog and cat shelters and NGOs

Fifty-eight percent of the 376 respondents owned or managed a registered charity dog or cat shelter facility. The legal nature of the remaining shelters was private (23%), public (13%) or semi-public (8%). The majority of these facilities were rescue shelters (n=298) or pensions (n=41). Sixty-six percent of respondents owned/managed one facility, while the remaining had 2 or more. Most facilities shelter less than 100 animals per year (47%) but 20% of respondents stated that they shelter over 500 animals per year. Figures were similar for both animals. One third of the facilities has very high adoption rates (between 75-100%), while another third has an adoption rate below 25%. The average residence time is in most cases very long (70% of the facilities host animals for more than one month), with only 9% keeping animals for less than two weeks.

A total of 392 NGOs participated in the survey. Most NGOs also managed shelters or catteries: the majority managing less than 5 facilities (50% for shelters and 33% for catteries) though one third of respondents represented larger organisations managing or owning over 10 facilities. The number of animals entering their facilities each year was less than 100 for one third of respondents and between 100 - 500 for another third.

[97] As defined under national legislation, if any

Dog trainers

A total of 757 dog trainers belonging to a wide range of EU countries filled in the questionnaire. Medium size businesses were the majority: 15% of respondents reported training less than 10 dogs per year, 47% between 10 and 50, 26% between 51 and 100 and only 12% trained more than 100 dogs a year. The vast majority of respondents carried out their business alone without additional employees (68%), while 26% had less than 10 and only the remaining 6% had more than 10 employees.

ANNEX 2. NATIONAL LEGAL FRAMEWORKS RELEVANT TO DOGS AND CATS IN COMMERCIAL PRACTICES

The table below summarises which topics are mentioned in national legalisation in EU Member States

National legal frameworks relevant to dogs and cats in commercial practices in EU Member States														
Member State	**Identification**		**Registration**			**Transport**			**Welfare**			**Stray and abandoned**		
	Dogs	**Cats**	**Dogs**	**Cats**	**Compliance***	**Dogs**	**Cats**	**Compliance***	**Dogs**	**Cats**	**Compliance***	**Dogs**	**Cats**	**Compliance***
Austria	1	0	1	0	N/A	1	1	6	1	1	x	1	1	x
Belgium	1	0	1	0	6			3	1	1	5	1	1	5
Bulgaria	1	0	1	0	4	0	0		1	1	4	1	1	6
Croatia	1	1	1	1	7	0	0		1	1	6	1	1	6
Cyprus	1	0	1	0	4	0	0		1	1	4	1	0	3
Czech Republic	1	0	1	0		0	0		1	1	5	1	1	6
Denmark	1	0	1	0	7	0	0	1	1	1		1	1	
Estonia	1	0	1	0	6	0	0		1	1	6	1	1	6
Finland	0	0	0	0	N/A	0	0	N/A	1	1	6	1	1	6
France	1	1	1	1	1	1	1	5	1	1	6	1	1	5
Germany	0	1	0	1	1	1	1	1	1	1	5	0	1	1
Hungary	1	0	1	0	6			1	1	1	5	1		6
Ireland	1	0	1	0	3	1	1	4	1	1	5	1	0	4
Italy	1	1	1	1	5		1							
Latvia	1	1	1	1		0	0	2	1	1		1	1	
Lithuania	1	1	1	1	3	0	0	N/A	1	1	5	1	1	4
Malta	1	0	1	0		1	1	7	1	1	0	0		
Netherlands	1	0	1	0	4			4	1	1	4	1	1	6
Poland	0	0	0	0	1			1	1	1	1	1	1	4
Portugal	1	0	1	0	5	1	1	4	1	1	5	1	1	3
Romania	1	0	1		1			1			1	1		1
Slovakia	0	0	0	0	4			5	1	1	5	1	1	5
Slovenia	1	1	1	1		0	0		1	1	6	1	1	6
Spain	1	1	1	1	1	1	1	1	1	1	1	1	1	1
Sweden	1		1		6	1	1	1	1	1	4			1
UK	0	0	0	0	1			1	1	1	1	1		1
***1= no compliance, 7= full compliance; NA= not applicable**														

Annex 3. Socio-economic data: case study Member States

Supplementary information to that found in the main report is presented below.

Belgium

Dog and cat population

In 2010, 47% of Belgian households owned at least one dog or cat, according to Onderzoeks- en Informatiecentrum van de Verbruikersorganisaties (OIVO). This corresponds to the findings of this study, that found 23% households owning a dog, and 24% owning a cat (table 7). The OIVO investigation found that the percentage of households owning a cat is similar in low and average social groups. However households within high social groups tend to have more cats[98].

According to a survey carried out by the Solvay School of Commerce[99], household expenditure on pets in Belgium in 2004 was 819 million euro. Of this, nearly 24 million euro was spent on the purchase of dogs and 194 million euro on dog food. Cat food purchases at 198 million euro were slightly higher than dog food. Overall, pet food was the single biggest item of expenditure at 459 million euro, or 56% of all expenditure. A sum of 94 million euro was spent on pet accessories, equivalent to 11% of all expenditure. The latter shows a strong upward trend, increasing by almost 16% annually between 2001 and 2004[100].

Household expenditure on pets in Belgium 2004[115]

Belgium 2004	Amount	Percentage
	€ (million)	%
Household expenditure pets	819.09	100%
Purchase of house pets	37.20	4.6%
Purchase of dogs	23.77	2.9%
Feed	458.72	56.0%
of which:		
Feed for dogs	194.10	23.7%
Feed for cats	198.10	24.2%
Pet accessories	93.68	11.4%
Veterinary care	146.73	17.9%

Pet food

According to the OIVO study, employment in the production of pet food in 2004 was 159 people. 240 people were employed in pet food wholesale. Retailers specialised in

98 OIVO 2010. Pets. Onderzoeks- en Informatiecentrum van de Verbruikersorganisaties 2010, Belgium.
99 Economic impact of companion animals in Belgium, Solvay School of Commerce, Université Libre de Bruxelles, 2008 (commissioned by UEVP).
100 Euromonitor International 2013. http://www.euromonitor.com/pet-care-in-belgium/report

companion animals had around 1,900 employees in 2004, with a turnover of 277 million euro.

Special food, for example dietetic food, is mostly sold by veterinarians as pet owners still have more trust in their veterinary surgeon with regards to special pet foods[98].

VETERINARY CARE

Belgians spent around 147 million euro on veterinary care in 2004. In Belgium there were 3,689 veterinarians registered in 2004 with an estimated total turnover of 388.5 million euro. This included around 1,220 veterinarians specialising in companion animals, who had an estimated total turnover of 130 million euro. In 2006 there were over 4,000 veterinarians in Belgium[98], as shown in the table below.

OTHER SECTORS

There are a few other relevant sectors in addition to veterinarians, breeders and pet food workers. In 2008 in Belgium, there were approximately 1,000 grooming parlours with an estimated 1,350 employees. There were approximately 300 dog training centres. In 2006, the number of sanctuaries was estimated at 78, with approximately 37,000 dogs and 35,000 cats. Other sources estimate the number of sanctuaries to be around 100.

In 2008, there were around 310 pet boarding kennels and catteries, with around 500 employees. Most of the people working in boarding kennels and catteries, and especially in sanctuaries, are volunteers.

In 2008 there were 22 crematoria and cemeteries with around 50 employees. Their turnover is calculated to be 6.8 million euro per year[113, 114, 115].

Social-economic data for pet-related products and services in Belgium 2004[113]

Belgium 2004	Turnover € (million)	Employees
Breeding sector	41.33*	743
Pet food production	-	159
Wholesalers	-	240
Retailers (cat/dog specialised)	277.5	1,900
Veterinarians	388.5	3,689
Companion animals	130	1,220
Grooming parlours	-	1,350 (in 2008)
Boarding kennels and catteries	-	500 (in 2008)
Crematoria / cemeteries	6.8	50 (in 2008)

* Turnover of 'Breeding of other animals', excluding cattle, pigs, horses and poultry. About 90% of the turnover is a result of breeding companion animals.

France

The market share of pet care sales (including dog and cat food, food for other animals and accessories) increased by 2.2% in 2013 compared with 2012[101].

Euromonitor gives a positive view on the economics of the pet care industry in 2013, although only a little growth can be observed. The French dog population is expected to decrease while, as stated above (dog and cat population tables 5 and 6), the cat population is expected to grow. Fewer dogs results in lower purchases and a decline in volume sales, as expected by Euromonitor. There is no increase or decrease in expenditure of pet owners on their companion dogs in early 2014[102].

Dog and cat population

In France there were 7.4 million dogs and 11.4 million cats in 2012, according to FACCO (Chambre Syndicale des Fabricants d'Aliments pour Chiens, Chats, Oiseaux et autres animaux familiers) and FEDIAF (See tables 5 and 6). Purebred dogs or dogs that look like purebreds are popular in France and account for about 70% of the dog population. The three most popular pure breeds are the Labrador, Yorkshire terrier and the poodle. With regard to the feline population, about 75% is European. Other popular purebred cats are the Siamese, Chartreux and the Persian[103].

Pet food

Dog and cat food manufacturers focus increasingly on food for special groups of animals, for example specific breeds, lifestyle or neutered cats. With regard to dog food, the value share is not expected to change significantly compared to previous years. In spite of the decreasing dog population and maturity of the dog food market, Euromonitor expects some changes and dynamic trends in the short term[104]. With regard to cat food, mixed-feeding is expected to become popular in 2014, with manufacturers advising to feed a mix of dry and wet cat food. Nestlé and Mars are still the leaders in cat food sales with a combined market share of 59%. Both producers are expected to launch more new premium products, for example in therapeutic cat food[105].

Veterinary care

According to the annual report of l'Ordre des vétérinaires, there were 16,747 registered veterinarians in December 2012. This means a growth of 2.5% compared with 2011 (16,351 members). More women subscribed to l'Ordre des vétérinaires, although women remain a minority of veterinarians. Almost 77% of female veterinarians work with companion animals compared to 56% of male veterinarians. In 2009, about 70% of veterinarians worked for more than 80% of their time with companion animals[106].

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101 Euromonitor International2013. http://www.euromonitor.com/pet-care-in-france/report
102 Euromonitor International2013. http://www.euromonitor.com/pet-care-in-france/report
103 FACCO 2012 http://www.facco.fr/La-population-francaise-d-animaux
104 Euromonitor International 2014. http://www.euromonitor.com/dog-food-in-france/report
105 Euromonitor International 2014. http://www.euromonitor.com/cat-food-in-france/report
106 Syndicat national des Vétérinaires d'Exercice Libéral 2012. http://www.snvel.fr/1-syndicat-national-des-veterinaires-d-exercice-liberal-snvel/115-qui-sommes-nous/313-les-chiffres.aspx

OTHER

Livre Officiel des Origines Félines (LOOF) is a French non-profit organization, founded in 1996. LOOF is an organization for the defence and promotion of selective cat breeders.
In 2012 and 2013, at least 5,700 breeders registered one litter, with a mean litter size of 3.18 kittens.

In 2013 30,296 pedigree dogs were registered[107, 108]. In 2007, Leroy and colleagues sent questionnaires to breeders with the aim of investigating selection goals and management methods. They received 985 answers in total. The breeders were either occasional breeders, regular hobby breeders or professional breeders. Almost 40% of breeders indicated 'good conformation' as the most important breeding goal, followed by behaviour.

About 300 different dog breeds are reared in France. Most breeds descend from former breeds of working dogs, for example hunting dogs. The mean litter size recorded in 2013 was 2.6. About 78% of breeders kept only one breed.

The conclusion of the Leroy study was that selection goals were linked to the breed, but selection methods, for example the use of artificial insemination, were linked to the type of breeder[109].

Germany

The market share of pet care sales (including dog and cat food, food for other animals and accessories) decreased by 0.2% in 2013 compared with 2012. This decreasing market share of pet care sales occurred despite the indicated growth of the number of companion animals by IVH[110]. Corresponding with the above, Euromonitor International reports a minor decrease in 2011, but noticed an upward trend in the beginning of 2013. German pet owners have shown to be less cost-conscious than pet owners from other countries. Consequently, German dog and cat owners buy more products from specialised pet stores than wholesalers.

Due to the abundant range of goods and the specialist knowledge of the staff, consumers of pet goods visit pet superstores more frequently than supermarkets and groceries[111].

DOG AND CAT POPULATION

According to Euromonitor, in 2012 there were 5.3 million dogs in Germany and 8.2 million cats; the same as in 2010[130]. However the German Industrieverband Heimtierbedarf (IVH) counted 6.9 million dogs and 11.5 million cats in 2013[112].

PET FOOD

107 LOOF 2013. Statistics – regardless of the breed. Livre Officiel des Origines Felines, Pantin, France.
108 LOOF. Missions and Actions. Livre Officiel des Origines Felines, Pantin, France.
109 Leroy, G.2007. Breeding goals and breeding practices of French dog breeders: result from a large survey. Revue de Médecine Vétérinaire, 2007, 158, 10: 496-503.
110 IVH 2013. http://www.ivh-online.de/de/home/der-verband/daten-fakten.html
111 Euromonitor International 2013. http://www.euromonitor.com/pet-care-in-germany/report
112 IVH 2013. http://www.ivh-online.de/de/home/der-verband/daten-fakten.html

Euromonitor International is positive with regard to market growth for both the dog and cat food sectors. With regard to the dog food market, 2% growth is predicted for 2013, seen as a positive result regarding the maturity saturation of the sector in Germany. The increase of 2% will reach a sales value of 1.2 billion euro. Mars and Nestlé are the two leading companies, accounting for 41% of the sales volume in 2012.

In Germany, more people are taking older dogs from shelters, stray animals or picking up dogs from abroad. This will likely lead to an increase in volume sales for dog food for special groups, like seniors and therapeutic food, since many of these dogs have special dietary needs.

Concerning cat food, Euromonitor is also positive, expecting 3% growth in 2013, with total sales exceeding 1.5 billion euro. This is at least partly due to the increasing cat population, but also to the fact that people increasingly view their cat as a member of the family and therefore only want the best products for their pets. According to Euromonitor, cats are expected to remain the most popular pets as the number of small households increase and Germans face increased workloads[113].

VETERINARY CARE

According to the Bundestierärztekammer there are about 37,000 registered veterinarians in Germany (2015). According to the Friedrich-Loeffler-Institut (FLI, the Federal Research Institute for Animal Health) there were around 25,500 active veterinarians in Germany in 2010[114].

Hungary

DOG AND CAT POPULATION

The pet sector is increasing in Hungary with 40% of households having a cat and/or dog. This compares with the estimated European average of 20-30%. FEDIAF reports 33% and 36% of households in Hungary owning at least one dog or one cat respectively[115].

PET FOOD

The Hungarian pet food sector is financially healthy. In 2008, external trade amounted to 72% of total sales revenues. This percentage was lower for every other sector, with the percentage for the food industry being 20%. In Hungary, the pet food companies Mars and Nestlé both have production, managing and distribution activities.

The demand for pet food is growing. In 2009, the demand was estimated to be 160 thousand tonnes, 130 of which were produced in the country. National sales revenues have grown to 30 billion HUF, nearly 97 million euro, in 2008. An increase of 25% compared with 2003. Most of the pet food products were sold by hypermarkets and supermarkets, though superstores specialised in pets are increasing.

113 Euromonitor International 2013. http://www.euromonitor.com/dog-food-in-germany/report
114 FLI Tiergesundheitsjahresbericht 2010. http://www.fli.bund.de/fileadmin/dam_uploads/Jahresberichte/TG-JB/TGJB_2010.pdf
115 Agricultural Economics Research Institute. Pet food productions in Hungary, Budapest, 2009

In 2012 one third of pet care products were sold by hypermarkets. Another third was sold by supermarkets and special pet shops. Internet sales are an upcoming point of sale[116].

In total, members of the Hungarian Pet Food Association produced 408 thousand tons of pet food in 2008, a growth of 4% in comparison with the previous year. Altogether, Hungarian pet food enterprises had a revenue of HUF 62.4 billion in 2008, around 200 million euro, with products sold outside the country contributing about 144 million euro[131]. Euromonitor International expects some factors to become less advantageous for pet food producers.

For local retailers, internet sales are and will be an obstacle, due to the high VAT in Hungary. The prospects for pet food prices for consumers are therefore favourable.

Though demand for quality is increasing, consumers are not loyal to specific brands. This is partially as a result of Hungarians being very cost-conscious, as well as frequent sales promotions. The economically less favourable years have caused consumers to switch to cheaper brands, though in 2012 both the volume and value of pet food sales showed an increase[131].

EMPLOYMENT

In 2007 there were about 50 pet food companies, although only three were operating on a large scale. In 2008, pet food plants employed nearly 1,500 employees, despite a decline in the number of plants. Over 90% of employees are working for the three major companies[131].

VETERINARY CARE

There are 2,862 qualified veterinarians in Hungary. There is one Faculty of Veterinary Science in Budapest. Veterinary medicine in Hungary falls under the law (2012. évi CXXVII. törvény). This law regulates the activities of the veterinary services and of the Hungarian Veterinary Chamber. Continuing education has been compulsory for veterinarians in Hungary for about 20 years. Records of continuing education are kept by the Hungarian Veterinary Chamber. There are nine colleges of specialists.

SUMMARY TABLE

Pet food sector Hungary [131]

Pet food	Year	€ (million)	Year	€ (million)
National sales revenues	2003	77.6	2008	97
Produced pet food (x 1000 tons)	2007	392	2008	408
Total revenue HPFA*	2008	200		
Value export products	2008	360		
Dog / cat food	2008	262		

* HPFA: Hungarian Pet Food Association

[116] Euromonitor International 2013. http://www.euromonitor.com/pet-care-in-hungary/report

Italy

DOG AND CAT POPULATIONS

In 2013 there were an estimated 60.5 million pets in Italy, including more than 14 million dogs and cats. About 42% of Italian households own a pet, the highest percentage in Europe. For Italians, pets are increasingly becoming a member of the family[117]. According to FEDIAF, 22% of Italian households own at least one dog and 20% a cat.

PET FOOD

The pet food market in Italy has a great opportunity to grow, since only 60% of Italian pet owners feed their pets with commercial food, rather than homemade food or leftovers. The value of the pet food market increased by 1.7% in 2013 to 1,776 million euros.

In Italy, pets and their owners have a very close relationship: 92% of people interviewed said they can't live without the presence of their cat or dog. Due to the love for their animals and despite the recession, Italian pet owners have not lowered the quality of their purchases, though they changed their purchasing habits, for example by visiting several shops instead of just one. According to Euromonitor International, Italians are even willing to buy more products with added-value to make sure they buy the best for their pets[118].

VETERINARY CARE

An average Italian dog or cat owner spends 30 euro per month on pet food, while 70% of owners spend nearly 100 euro per year on veterinary and pharmaceutical costs.

The Netherlands

The pet sector in the Netherlands is increasing. The total estimated volume in 2003 was 1.1 million euro[119].

DOG AND CAT POPULATION

Although the pet sector itself is increasing, the number of animals is not. In 2010 there were 1.5 million dogs and 2.9 million cats compared to 1.8 million and 3.3 million respectively in 2006 [119]. As in other countries, pet sector figures need to be interpreted with caution. FEDIAFF estimated the population of dogs and cats to be respectively 1.5 and 2.9 million in 2010 and 1.59 and 2.68 million in 2012[120].

The HAS Hogeschool in Den Bosch reported a growth in popularity of pedigree dogs, after analysing questionnaires filled out by pet owners. However, the number of purebred pups declined from 2006 to 2011. An explanation mentioned in the report were the mistaken

117 USDA Foreign Agricultural Service 2013; Italy Pet Food Sector Overview 2013. Global Agricultural Information Network 2013, Rome, Italy; ASSALCO 2014 – Zoomark 2014 Report on the Feeding and Care of Pets. http://www.assalco.it/index.php?action=shownews&id=1&nid=5321\

118 Euromonitor International 2014. http://www.euromonitor.com/pet-care-in-italy/report

119 HAS Kennistransfer, Hogeschool HAS Den Bosch, 2011. Feiten&Cijfers Gezelschapsdierensector 2011. HAS, Den Bosch, Netherlands

120 FEDIAF 2010. http://www.fediaf.org/fileadmin/user_upload/facts_and_figures_2010.pdf

answers given by pet owners when filling out the questionnaire, as they assume their look-a-like dog is a real pedigree dog[119].

With regard to cats, the total number of these animals declined, including the number of pedigree cats. However, there is less information on pedigree cats, making the number questionable. In the Netherlands, around 44% of all dogs originate from breeders. The other 56% come from private households, internet trading or from dog shelters. For cats, these percentages are quite different. Only 8% of cats come from breeders while the remaining 92% originate from shelters and private individuals[119]. In the Netherlands, the Raad van Beheer (the Dutch Kennel Club) registers about 38,000 puppies per year from approximately 260 different breeds[121].

PET FOOD

The members of the Dutch association of pet food, NVG, reached a total revenue of 308 million euro in 2010, with the NVG being responsible for 90% of the pet food market in the Netherlands. Over 433,000 tonnes were produced in the country itself. Another 47,000 tonnes of dog pet food and 49,000 tonnes of cat pet food were imported[122].

About 30% of the expenses of pet owners are spent on pet food. In 2010, as much as 1.7 billion euro was spent on animals and animal related products and services. Most products are bought at supermarkets (50%) with specialised shops coming second with 44%. The latter dominated the market in 2006[137]. Euromonitor International is positive about the Dutch pet food market, due to the huge population of dogs and cats and the demand from pet owners for more value-added products[1238].

Despite the recession and because of the close relation with their pets, the Dutch people are increasingly looking for quality products, including products containing more natural ingredients and less artificial additives. Nestlé Purina and Mars Inc. are by far the market leaders, although they lost market share in 2012. With consumers demanding more specialised food, private labels became more popular since they could offer their products more cheaply. Despite the careful spending of dog and cat owners, their desire for more expensive, high quality products is expected to lead to growth for the pet care industry in the future[123].

EMPLOYMENT

In the Netherlands 4,200 people were employed in shops selling pet products in 2004, which is an increase of 11% compared to the year 2000[134].

With regard to the breeders mentioned above, 8,000 dog breeders were registered in the Netherlands in 2010. Of these 8,000, 426 are commercial breeders. The number of cat breeders in the country is 8,500. However, this is only an estimated figure due to the lack of official information. The turnover of breeders is estimated at a total of 17 million euro, with dog breeders contributing almost 13.6 million euro and cat breeders contributing over 3 million euro[134].

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121 Raad van Beheer 2014. http://www.raadvanbeheer.nl/raad-van-beheer/over-de-raad/kerngegevens/

122 Nederlandse Voedingsindustrie Gezelschapsdieren 2014. http://www.nvg-diervoeding.nl/

123 Euromonitor International 2013. http://www.euromonitor.com/pet-care-in-the-netherlands/report

VETERINARY CARE

In 2010, there were 3,180 veterinarians working in the field; 1,370 of them were working solely with companion animals. Together with veterinarians who also work with other animals, 1,688 veterinarians are working in the pet sector. This shows an increase of 16% compared to 2006, illustrating the relevance of the pet sector. Though the number of practising veterinary surgeons is known, the number of treated animals is uncertain. In Utrecht at the veterinary faculty there were about three times more surgeries in 2010 compared to 2006. Over 75% of surgical interventions involved dogs. Interventions related to cats accounted for 16% of the patients. When visiting a veterinarian, in one year a pet owner spends on average about 64 euro on their pet. A dog owner pays on average 89.80 euro and a cat owner 70.80 euro per year. On an annual basis this will result in a total expenditure of respectively 120 million euro and 134 million euro on veterinary care[134].

OTHER

In 2007 there were 460 kennels and 700 grooming salons. In the Netherlands over 175,000 dogs and cats were insured in 2010, meaning about 4% of the population. An average insurance will cost the dog or cat owner some 220 euro per year. Insurance premiums amount to 40 million euro per year[134].

SUMMARY TABLES

Overview cash flow Netherlands

Overview cash flow	€ (million)
Expenses veterinarian*	€254
Turnover breeders	€17
Turnover pet requirements	€1,700
Revenue pet food (NVG)	€308
Expenses insurance**	€40

* Veterinary expenses pet owners
** Insurance expenses pet owners

Pet sector Netherlands

Pet sector	
Breeders	**Number**
Breeders dog	8,000
Breeders cat	8,500
Annual veterinary expenses	
Dog owner	€89.80
Cat Owner	€70.80
Origin pets	
Origin Dog	Breeder (44%) Shelters, privates, internet trading (56%)
Origin cat	Breeders (8%) Shelters, privates (92%)

Source: HAS Den Bosch. Feiten&Cijfers Gezelschapsdierensector 2011.

Poland

DOG AND CAT POPULATION

In 2007 Poland had about 6 million cats and 8 million dogs[124].

PET FOOD

The pet food market has a lot of opportunities to expand as only 13% of pet food is bought, while the rest is 'home made'. Polish people spent nearly 170 euro per capita on pet food products in 2005. This value is expected to grow due to increasing average income and raised awareness of animal health. In 2005 the value of the pet food market increased by 8% to 193 million euro, consisting of dog pet food (57%) and cat pet food (43%). In 2012 the total sales revenue was of over 200 million euro[125].

The leading pet food company is Mars Inc., which holds 60% of the market share. Other brands are Whiskas and Pedigree. With regard to the pet food market, about a quarter is traded in, particularly raw products that are introduced from outside the country for the manufacturing of pet food. In 2006 the introduction of raw products for pet food grew by 70%[125].

Polish pet owners are becoming more and more educated, with an increased awareness of animal health, possibly helped by frequent advertisements. Owners also show more awareness of proper nutrition and animal well-being[126].The European-wide trend of considering a dog or cat as a family member contributes to the desire for high-quality products. The popularity of specialised pet shops and veterinary clinics is remarkable. The Polish appreciate the variety as well as the professional advice given by veterinarians and trained personnel[126].

VETERINARY CARE

In 2013 there were approximately 9,500 qualified veterinarians in Poland, and approximately 3,500 small animal practitioners. The Veterinary Inspectorate of the Department of Food Safety and Veterinary Matters of the Ministry of Agriculture and Rural Development is responsible for all aspects of animal health, veterinary public health, food safety and foodstuff safety and epidemiology, which are regulated by the Act on the veterinary profession and veterinary medical chambers of 21 December 1990. Veterinarians are licensed to practice by the veterinary chamber, the Polish Veterinary Medical Chamber, which is also the professional association for veterinarians[127].

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[124] USDA Foreign Agricultural Service 2007. Poland Product Brief Pet Food Sector 2007. Global Agricultural Information Network 2007, Warsaw, Poland.
[125] Petfoodindustry.com 2014. Eastern Europe: An emerging pet food market with significant potential.
[126] Euromonitor International 2013. http://www.euromonitor.com/pet-care-in-poland/report
[127] European Board of Veterinary Specialisation (EBVS) http://ebvs.eu/countries/poland

OTHER

In 2012 there were 161 shelters in Poland, 66 shelters were solely for dogs and 94 for both dogs and cats. One shelter was designed specifically to give shelter to horses. In 2012 the shelters accommodated 105,539 dogs and 21,832 cats. Of these animals, 59,124 dogs and 12,772 cats were adopted. The number of pets found dead in the shelter and euthanized animals were 6,374 and 4,508 respectively for dogs, and 2,960 and 1,959 respectively for cats.

Where dogs are concerned, these numbers decreased slightly compared to 2011. In the case of cats, the numbers registered a slight increase. Neutering of stray animals is not obligatory, but a positive trend can be seen in the number of animals neutered. In 2012, 22,242 out of 105,539 dogs were neutered and 6,896 out of 21,832 cats were castrated. With regard to animal welfare, shelters have several shortcomings. There are no specific regulations or requirements a shelter has to comply with, for instance regarding the minimum space per animal. However legislation is in progress[128].

Romania

In 2008 Romania also suffered from the economic recession. Consumers were not willing to spend their money on products from any sector. However, products and services related to pet care did not suffer disproportionately, though the market did shrink. The share of pet care products and dog and cat food in particular, decreased. The pet product market did not shrink at all. Products such as toys, cat litter and vitamins were in demand[129].

PET FOOD

From 2012 the economy started to recover. Romanians, as well as many other European citizens, became more and more aware of the importance of the health of their pets as well as the need to feed them correctly. This is partly attributed to increased accessibility of (high quality) information sources, leading to better educated pet owners. Small companies have adapted in a clever way to this higher level of education by developing specialised pet products, covering several niche areas in the sector. The major part of the market is still dominated by Mars Inc. and Nestlé. In the future the pet care industry is expected to grow, mainly as a result of increasing expenses on pet animals in rural areas, as pets become increasingly considered as family members instead of just animals for protection and pest control[144].

VETERINARY CARE

There were approximately 8,000 qualified veterinarians in Romania in 2013, and five veterinary schools. Veterinary medicine is regulated by the Romanian College of Veterinarians (Colegiul medicilor veterinary (CMV) based in Bucharest. The College was established based on the Law 160/1998 (as updated and republished on 7 January 2004). It has 42 regional Colleges in the country. The CMV is responsible for the professional

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128 KrzysztofJażdżewski 2014.http://ec.europa.eu/dgs/health_consumer/information_sources/docs/ahw/20140410-12_warsaw_day3_1315_krzysztof-jazdzewski.pdf

129 Euromonitor International 2013. http://www.euromonitor.com/pet-care-in-romania/report

recognition of diplomas, attestations or other documents granting qualification in the veterinary profession[130].

Slovakia

The dog and cat population is expected to grow in Slovakia, therefore Euromonitor assumes the pet care sector will also grow, in spite of the economic regression. The Slovak economy is also expected to stabilise and consequently to stimulate Slovak consumers to increase their expenditure, hence stimulating the pet care sector[131].

PET FOOD

The pet care industry in Slovakia is flourishing. The exceptional demand for premium and health dog food products is noteworthy. Consumers are looking for the best quality products for their animals, demanding foods with high nutritional value. As better nutrition for humans is improving health, dog owners are also increasingly aware of the importance of adequately feeding their pets to promote their health, even though prices are much higher compared to the prices of standard products[146].

VETERINARY CARE

There are about 1250 veterinarians in Slovakia (2012). The provision of veterinary services is regulated by the Slovak Chamber of Veterinary Surgeons under the Act No. 442/2004 Coll. on private veterinarians and on the amendment of Act No. 488/2002 Coll. on veterinary care. The Slovak Chamber of Veterinary Surgeons registers all veterinarians entitled to provide veterinary services in Slovakia. The main activities of the Chamber are the organisation of continuing education initatives; international activities (e.g. participation at the general assembly of the FVE) influencing the change and creation of legislation on medical policy; identification of companion animals and the organisation of events for members[132].

Spain

The market share of pet care sales (including dog and cat food, food for other animals and accessories) increased by 7.3% in 2013 compared with 2012[133].

PET FOOD

According to Euromonitor International, growth is lower than before the European economic crisis. However the Spanish pet care sector is still a healthy economic market, despite consumers switching to cheaper food products. Product prices were higher in 2012 and 2013 due to the higher prices of particular pet food components, among which raw materials. To keep their sales volume stable, companies did not pass these price increases on to consumers, decreasing the profit margins of their products.

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[130] European Board of Veterinary Specialisation (EBVS) http://ebvs.eu/countries/romania; Romanian College of Veterinarians
[131] Euromonitor International 2013. http://www.euromonitor.com/pet-care-in-slovakia/report
[132] Chamber of veterinary surgeons of Slovakia 2013. Annual report 2013. Bratislava, Slovakia; European Board of Veterinary Specialisation (EBVS) http://ebvs.eu/countries/slovakia
[133] Euromonitor International 2013. http://www.euromonitor.com/pet-care-in-spain/report

Small and specialised retailers are facing particular difficulties as private brands have reached the same quality as regular brands, detracting consumers from buying regular brands. Retail groceries are becoming more popular as pet owners can buy products at lower prices, and they are expected to grow in the future. Manufacturers are expected to invent and find other ways of distributing their products as well as lowering their costs. Overall, no major changes are foreseen in the Spanish pet care market.

VETERINARY CARE

In Spain there are approximately 22,500 qualified veterinarians, and Veterinary medicine is regulated by the Ministerio de Agricultura Alimentación y Medio Ambiente. The veterinary profession in Spain is governed by the Consejo Generalde Colegios de Veterinarios de España (CGCVE).

Sweden

PET FOOD

In 2012 the Swedish economy also faced the economic recession, unemployment increased and consumer confidence decreased. Consumers spent less on animal care products. The pet care market stagnated in almost every segment. In general, pet owners spent less money on products. However, demand for specialised food increased at the same time.

Swedish dog and cat owners increasingly prefer pet food without artificial additives or flavours. In general pet foods with more natural ingredients are preferred, as well as pet foods for specific ages, breeds or health issues. The latter is attributed to an increasing awareness of the relevance of animal health. With regards to retail, manufactures focus on in-store campaigning and special offers. Consequently consumers can save money as many companies face tough competition on price. Furthermore, internet sale are becoming more and more popular.

With regard to the future, Euromonitor International is not optimistic. The dog population is expected to decrease and several market categories will reach saturation. Once the economy improves, pet owners are expected to indulge their pets again, with the largest opportunities being niche and premium products[134].

VETERINARY CARE

In Sweden there are approximately 2,000 active veterinarians. Of all the 700 practicing veterinarian surgeons, around 230 work with companion animals[135]. In 2004 the value of veterinary related services for companion animals was estimated at 100 million euro[136].

[134] Euromonitor International 2013. http://www.euromonitor.com/pet-care-in-sweden/report
[135] SverigesVeterinärförbund 2014. Members. http://www.svf.se/en/English/Members/
[136] EUPAW 2010. http://www.eupaw.eu/docs/Final%20Report%20-%20EUPAW%20Evaluation.pdf

Other

According to the Swedish newspaper ‘Dine Penger’ keeping a dog in Sweden costs 1,100 euro a year and owning a cat around 600 euro.

In 2008, about 70% of the total pet population was insured and in 2013 the premium income for pet insurances increased to a value of 2.8 billion Swedish kronas, more than 300 million euro[137,138].

United Kingdom

Dog and cat population

According to the Pet Food Manufacturers Association (PFMA) in 2014 the UK had about 9 million dogs and about 8 million cats, living respectively in 24% and 17% of households[139].

Pet food

The market share of pet care sales (including dog and cat food, food for other animals and accessories) increased by 2.0% in 2013 compared with 2012. According to Euromonitor International the pet care sector shows positive results. In 2013 the sector had an overall growth of 4%, with pet food growing by 4% and the pet care sector by 5%. Pet owners are buying less food in terms of volume, instead they spend more money on premium foods and pet products, as the health of their animals becomes a top priority. With regard to the future, Euromonitor is expecting continuing growth, as the economic situation further improves.

According to the 2014 annual report of the PFMA, more cat and dog food is being produced. The amount of dog food produced was 814,000 tonnes with a value of 1.2 billion pounds sterling, around 1.5 billion euro. The amount of cat food produced was half that of dog food, reaching 412,000 tonnes with a value of 1 billion pounds, around 1.26 billion euro. The dog and cat food sectors grew respectively by 3% and 4%. Euromonitor International also noted a growth in the value of pet food, though only revenue values increased as the volume of sales declined (cat food) or remained the same (dog food) [140].

Veterinary care

In 2013 in the UK there were 18,891 practicing veterinary surgeons (18,413 in 2012), 10,599 of which were female and 8,292 male. Of the registered premises in 2013, 1,245 (44.6%) were classed as small animal general practices while 170 premises (6.1%) were registered as small animal hospitals. In 2012 these were respectively 1,162 (44.1%) and 165 (6.3%)[141, 142].

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137 Trupanion 2014. Pet Insurance in Europe. http://trupanion.com/pet-insurance/european-influence-and-market-share

138 SvenskFörsäkring 2013. Insurance in Sweden statistics 2013. SvenskaFörsäkring, Stockholm, Sweden

139 Pet food Manufacturers Association (PFMA) 2014. http://www.pfma.org.uk/pet-population-2014

140 Euromonitor International 2014. http://www.euromonitor.com/cat-food-in-the-united-kingdom/report; http://www.euromonitor.com/dog-food-in-the-united-kingdom/report

141 Royal College of Veterinary Surgeons 2013. The annual report of the royal college of veterinary surgeons: part 2. RCVS, London, UK http://www.rcvs.org.uk/publications/rcvs-facts-2013/

142 Royal College of Veterinary Surgeons 2012. The annual report of the royal college of veterinary surgeons: part 2. RCVS, London, United Kingdom.http://www.rcvs.org.uk/publications/rcvs-facts-2012/

OTHER

In 2002 the pet insurance market was valued at USD 245 million or 200 million euro, increasing by 34.8% since 1998. In 2007 22% of all dogs and cats were insured[143].

143 FECAVA 2007. The economic importance of companion animals. Norway. http://www.fecava.org/sites/default/files/files/The%20economic%20importance%20of%20Companion%20animals%20report%202007.pdf

ANNEX 4. QUESTIONNAIRE ANALYSIS

The data analysis was executed in four different phases

1. data examination and selection,
2. per Member State data analysis (of the respondents and separate questionnaire questions)
3. comparison between the different Member State on relevant topics
4. extrapolation to the whole EU.

Association between pair variables was calculated through a Chi-square test.

Ad 1:

The data examination and selection is being executed to exclude invalid data, to gain insight into the characteristics of the data and to investigate the applicability of sophisticated techniques. The data examination phase consists of six steps:

- Excluding answers from respondents that did not fill out their country of residence.
- Excluding answers from outliers and strange distributions[144].
- Excluding multiple automatic entries by checking submission time. In case multiple entries are generated automatically, time and responses will be identical (>90%).
- Excluding the answers from private veterinarians who work in practices that dedicate less than 40% of their time to dogs and cats.
- Missing answers have been described, but not included in the analysis.
- Assessing the ability of the data to meet the statistical assumptions specific to many multivariate techniques.

During this phase the main features of the collected data from the questionnaires have been described:

- Number of replies
- Demographic features of the groups of respondents
- Average, standard deviation and frequency distribution per question (where relevant and possible)

Ad 2:

In the 2nd phase, data analyses have been executed per Member State. The objective of this phase is to distinguish the relation between characteristics of the respondents and their approach to animal welfare as well as trade in the specific Member State. Several statistical techniques have been used: correlation, (multiple) regression, cluster analysis.

144 procedure as described in Hair, 1998 Multivariate data analysis, Chapter 2 (explore your data)

Ad 3:

The objective of the 3rd phase is to gain insight into differences between the different Member States on relevant topics (results of 2nd phase serves as input). Besides 1by1 comparison, differences between the groups distinguished in section 3.1 (typologies of Member State) also exist.

Ad 4:

The objective of the 4th phase is to assess to what extent the outcomes of the case study country questionnaires can be used to draw conclusions about all 28 EU Member States.