



US Pet Industry

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Pet Industry Joint Advisory Council

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Pet Ownership

- **Pets are integral part of American society**
- **64% US Households**
- **More pets than people > 300 million**
- **Multi-billion dollar industry**
 - **2002 \$28.5 billion**
 - **2003 \$31 billion**
 - **2005 \$34 billion (est.)**



Demographics

(Household Income)

	Dogs	Cats	Birds	Small Animals	Reptiles	Fish
<\$15,000	16%	18%	20%	16%	16%	14%
\$15-24K	13	15	15	14	11	12
\$25-34K	13	14	14	12	13	14
\$35-49K	18	18	17	21	19	21
>\$50K	40	35	34	37	41	39



Market share

- ➡ **Mass Merchandisers = 27%**
- ➡ **Superstores/Chains = 26%**
- ➡ **Supermarkets = 19%**
- ➡ **Independents = 14%**



Retail Channels

(Live organisms)

Independent pet stores

Multi-store pet chains (3+)

Pet Superstores

Garden centers

**Home improvement/
hardware**

Mass Merchandisers

Discount

Farm/Feed stores

Warehouse clubs

Mail order/Catalogue

Internet



Historical Perspective

- **Fish keeping -- 3,000 years**
- **1611 First dragon/porcelain bowls imported Americas**
- **1849 First West Coast Pet Store**
- **1910 Importers and Growers**
- **2002 Importers and Farmers**
 - **800 + species farmed in Florida**
 - **2,500 + freshwater/marine species in trade**
- **Global industry**





Where Fish Acquired

- **Fish/Aquarium store** 35%
- **Pet stores** 35
- **Discount stores** 22
- **Pet superstore** 22
- **Friend/relative** 11
- **Bred at home** 8
- **Gift** 8

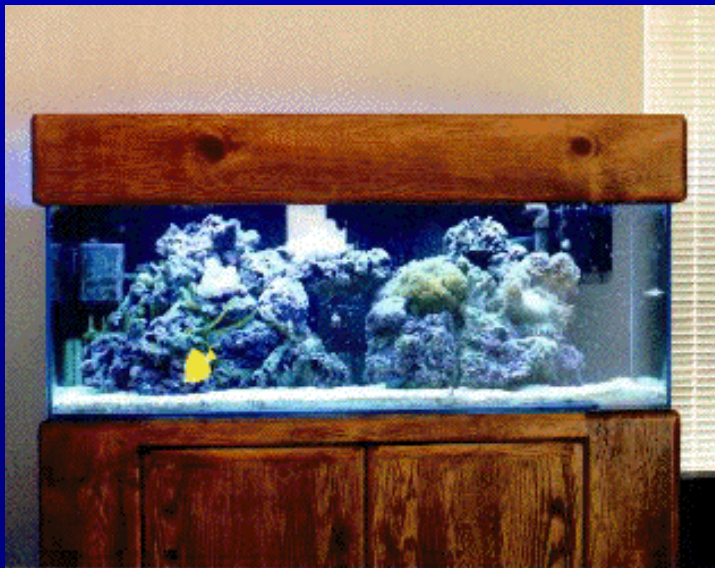


Fish Owners Length of Time

☞ < 1 year	10%
☞ 1 – 5 years	48%
☞ 6 years +	41%

Average years 6.7





Aquarium/Pond Ownership

13-14% US Households

14 million

US Households



Pond Market

- **16% Freshwater fish households also have garden ponds**
- **70% pond owners < 500 gallons**
- **> 2 million ponds**
- **One of fastest-growing categories**

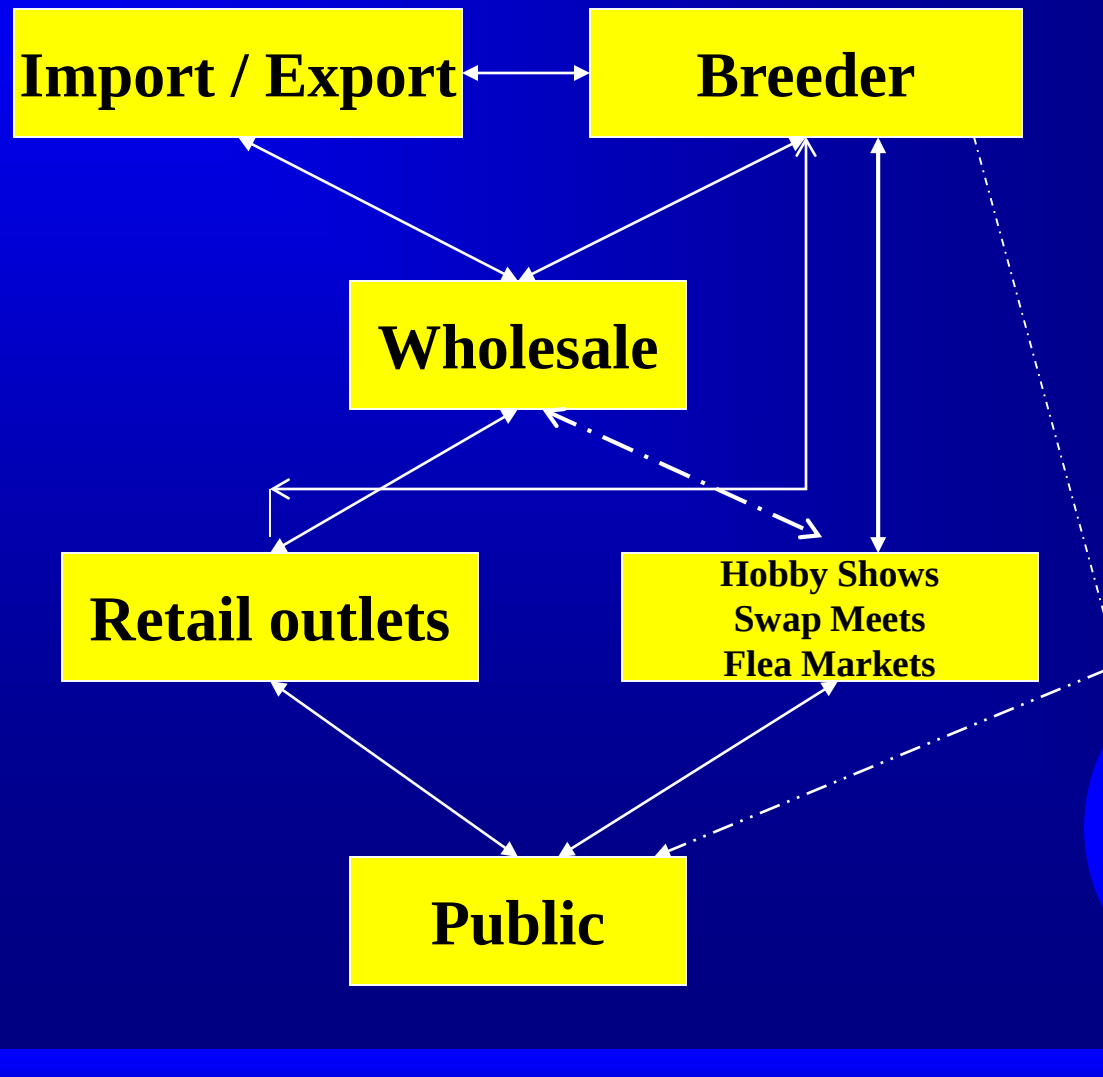






Pathways

Internet



**Internet
Newspapers
Swap Meets
Flea markets**





Global Movement

- Argentina
- Australia
- Barbados
- Bahrain
- Bangladesh
- Belgium
- Brazil
- Canada
- Chile
- China
- Columbia
- Congo
- Cook Islands
- Costa Rica
- Denmark
- Dominican Republic
- Egypt
- Entrea
- Fiji

- France
- Germany
- Hong Kong
- Indonesia
- Italy
- Japan
- Kenya
- Maldives
- Mauritius
- Netherlands
- Paraguay
- Puerto Rico
- Saudi Arabia
- Senegal
- Singapore
- Solomons

- South Africa
- Spain
- Sri Lanka
- Philippines
- Tanzania
- Thailand
- Tonga
- Tunisia
- UK
- USA
- Vanuatu
- Venezuela
- Yemen







Top 25 Freshwater Species



- Neon Tetra *Paracheirodon innesi*
- Zebra Danio *Brachydanio rerio*
- Plecostomus *Liposarcus anisitsi*
- Feeder Guppy *Poecilia reticulata*
- Male Betta *Betta splendens* "fantail"
- Comet Goldfish *Carassius auratus*
- Ghost Shrimp *Nantia gen. Sp.*
- Painted Glassfish *Chanda ranga*
- Red Wag Platy *Xiphophorus maculatus*
- Black Molly *Poecilia latipinna*
- Tiger Barb *Barbus tetrazona*
- Mixed Fantail Goldfish *Carassius auratus*
- Velvet Swordtail *Xiphophorus helleri*
- Black Neon Tetra *Hyphessobrycon herbertaxelrodi*
- Fancy Guppy Pair *Poecilia reticulata*
- Algae Eater *Gyrinocheilus aymonieri*
- Cherry Barb *Barbus titteya*
- Black Skirt Tetra *Gymnocorymbus ternetzi*
- Bala Shark *Balantiocheilus melantopterus*
- Serpae Tetra *Hyphessobrycon callistus callistus*
- Velvet Wag Swordtail *Xiphophorus helleri*
- Otocinclus *Otocinclus affinis*
- Albino Aeneus Cory *Corydoras aeneus* "albino"
- Bloodfin Tetra *Aphyocharax anisitsi*

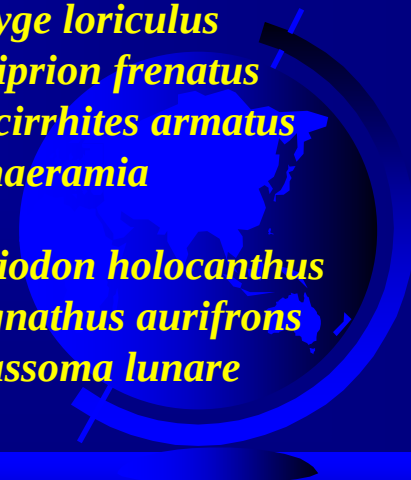




Top 25 Saltwater Species



- Assorted Damsel *Dascyllus sp.*
- Green Chromis *Chromis viridis*
- Yellow Tang *Zebrasoma flavescens*
- Scooter Blenny *Synchiropus ocellatus*
- Tank Raised Percula Clown *Amphiprion ocellaris*
- Green Mandarin Goby *Synchiropus splendidus*
- Royal Gramma Basslet *Gramma loreto*
- Firefish Goby *Nemateleotris magnifica*
- Coral Catfish *Phetusus angularis*
- Black & Gold Chromis *Paraglyphidodon nigroris*
- Cleaner Wrasse *Labroides dimidiatus*
- Brown Sebae Clownfish *Amphiprion sebae*
- Fiji Bicolor Angel *Centropyge bicolor*
- Assorted Clown Goby *Gobiodon citrinus*
- Hifin Bangai Cardinal *Pterapogon kauderni*
- Fiji Coral Beauty Angel *Centropyge bispinosus*
- Wild Percula Clown *Aphiprion ocellaris*
- Strawberry Basslet *Pseudochromis porphyreus*
- Flame Angel *Centropyge loriculus*
- Tomato Clown *Amphiprion frenatus*
- Flame Hawkfish *Neocirrhites armatus*
- Spotted Cardinal *Sphaeramia nematoptera*
- Atlantic Porcupine *Diodon holocanthus*
- Pearly Jawfish *Opistgnathus aurifrons*
- Lunare Wrasse *Thalassoma lunare*





Top 25 Invertebrates



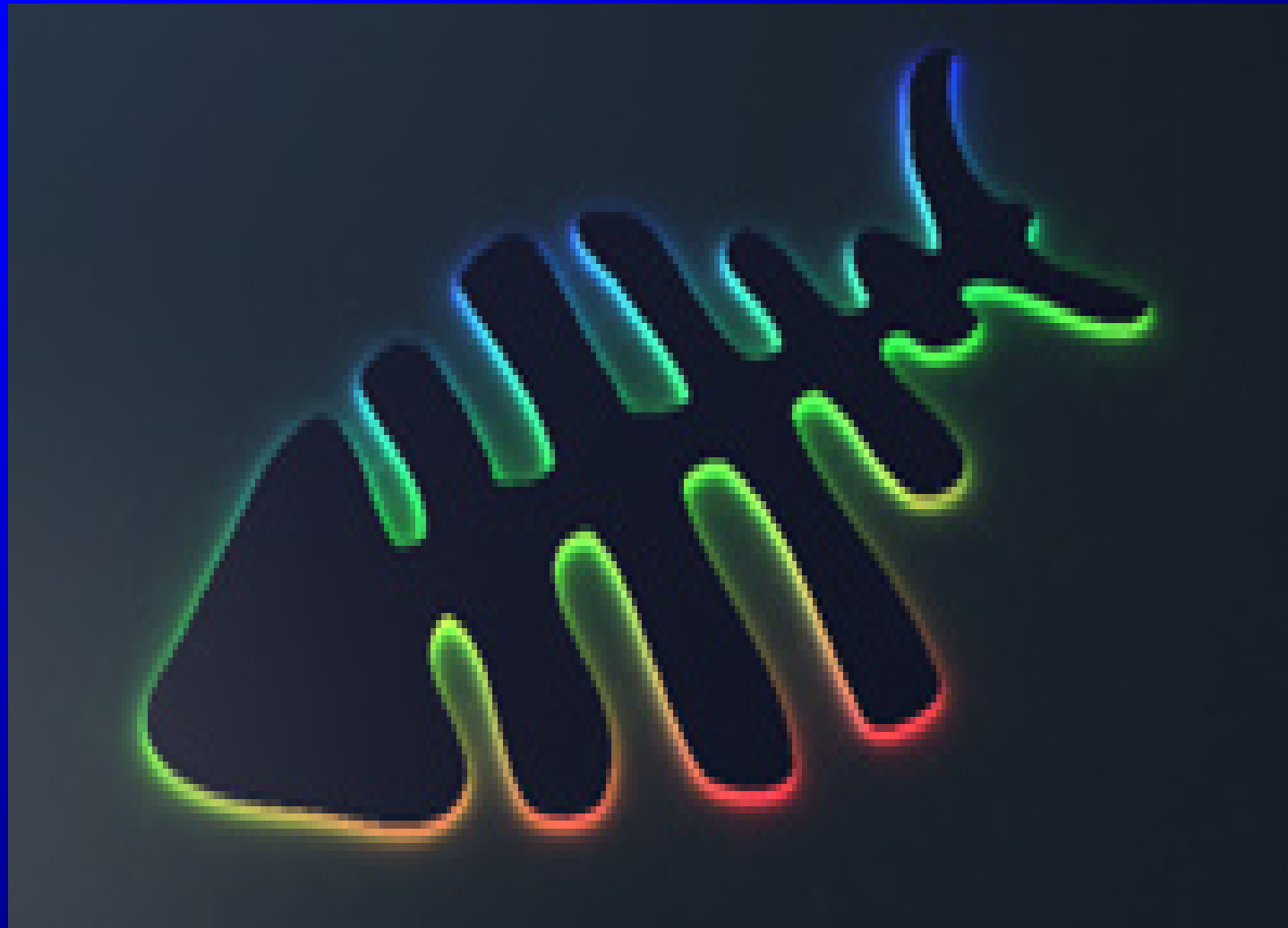
- Live Rock – Cultured
- Atlantic Turbo Snail *Tectus niloticus*
- Blue Leg Hermit Crab *Pagurus* sp.
- Live Rock - Fiji
- Condylactus Anemone *Condylactus gigantea*
- Margarita Snail *Margarites pupillius*
- Peppermint Shrimp *Lysmata multicissa*
- Live Rock - Tonga
- Brown Leg Hermit Crab *Eupagurus pridesuxi*
- Hawaiian Feather Duster *Seballastarte indica*
- Horseshoe Crab *Limulus polyphemus*
- Rock/Flower Anemone *Epicystis crucifer*
- Nassarius Snail *Nassarius variegatus*
- Emerald Green Crab *Mithrax sculptus*
- Camel Shrimp *Rhynchocinetes uritai*
- Haitian Pink Tip Anemone *Condylactus gigantea*
- Mexican Turbo Snail *Monodonta turbinata*
- Red Reef Hermit Crab *Paguristes cadenati*
- Banded Shrimp *Stenopus hispidus*
- Skunk Cleaner Shrimp *Lysmata amboinensis*
- Flame Scallop *Lima scabra*
- Choc-Chip Starfish *Protoreaster nodosus*
- Tank Raised Queen Conch Snail *Strombus gigas*
- Long Tentacle Anemone *Heteractis magnifica*
- Orange Cats Eye Snail *Monodonta* sp.



Top 25 Corals



- Cultured Pulsing Xenia *Xenia* sp.
- Leather *Sarcophyton* sp.
- Sunflower *Goniopora lobata*
- Button Polyps *Parazoanthus* sp.
- Yellow Stone Polyp *Parazoanthus* sp.
- Star Polyp *Pachyclavularia violecea*
- Sand Polyp *Zoanthus* sp.
- Bubble *Pterogyra sinuosa*
- Tonga Finger Leather *Sinularia brassica*
- I/O Colored Mushroom *Discosoma* sp.
- Gorgonian *Echinogorgia* sp.
- Brain Trachyphyllia *Trachyphyllia geoffroyi*
- Hammer *Euphyllia ancora*
- Flat Blad Purple Gorgonian *Pterogorgia* sp.
- Cultured Leather *Sarcophyton* sp.
- Colt *Alcyonium* sp.
- Long Tentacle Platy *Heliofungia actiniformis*
- Frog Spawn *Euphyllia divisa*
- Encrusting Briarium *Briarium asbestinum*
- Hairy Mushroom *Rhodactis* cf. *indosinensis*
- Elegance *Catalaphyllia jardinei*
- Tonga Bullseye Mushroom *Discosoma* sp.
- Green Mushroom *Actinodisus* sp.
- Spiny Gorgonian *Gorgonian muricea* sp.
- Blue Mushroom *Rhodactis* cf. *inchoata*





Industry and Regulation

- **1970s Lacey Act Proposed Clean List**
- **Funded research early 70s**
- **Federal vs. state regulation**
- **Federal Regulations**
- **State regulation**
 - **Facility standards**
 - **Health standards**
 - **Species Lists**
- **Codes of Conduct**
- **Best Management Practices**



Industry Involvement

- **Screening/Risk assessments**
- **Science-based dirty lists**
- **Codes of Conduct/Best Management Practices**
- **Industry/Public awareness**
- **Emergency Response Network**



Industry Involvement

- ➡ **Invasive Species Advisory Committee**
- ➡ **ISAC/ANSTF Prevention Committee**
- ➡ **ANSTF Western Regional Panel**
- ➡ **ANSTF New England Regional Panel**
- ➡ **ANSTF Mississippi River Basin Panel**
- ➡ **State councils/panels**



Industry Involvement

- ➡ **CBD**
- ➡ **CITES**
- ➡ **EU**
- ➡ **IUCN**
- ➡ **GISP**



Industry Concerns

- **Poorly crafted laws and regulations**
- **Regional differences – one size does not fit all**
- **Screening/Risk Assessments**
- **Data gaps**
- **Junk Science**
- **Ill-trained enforcement officers**

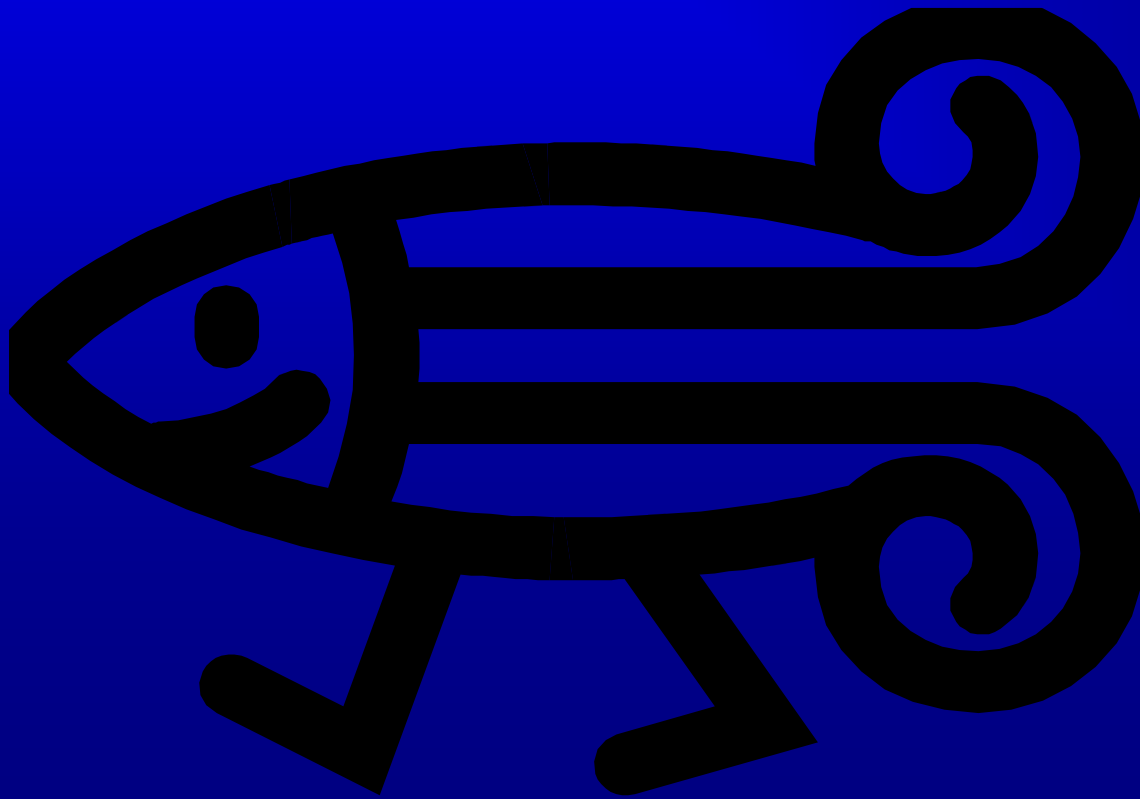


Industry Concerns

- **Acronyms and jargon create confusion**
- **Lack of standard terminology**
 - **Aliens Invasive Aliens, Invasive, Non-Native, Non-Indigenous, Exotic, Foreign, Nuisance**
- **Misinformation/disinformation**
- **Endangered Species Passé – Invasive Species in Vogue**



Invasives Hysteria



Marine Invasives

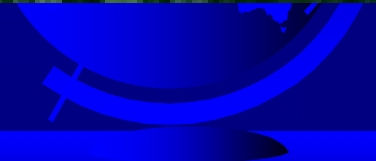


*Biological Invasion of the Indo-Pacific Lion Fish (Pterois volitans)
Along the Atlantic Coast of North America, Whitfield, Garnder, Vives, Gilligan,
Courtney, Hare, in press.*

Marine Invasives

Federal and State Regulation

- *Caulerpa taxifolia*
- *C. cupressoides*
- *C. mexicana*
- *C. sertularioides*
- *C. capelliformis*
- *C. racemosa*
- *C. verticillata*
- *C. aschmedeadii*





Surrender Centers – Unwanted Exotics

(Under discussion)

- **PIJAC-member Pet Stores**
- **Resell/Place in breeding program/Humanely euthanize**
- **Illegal specimens**
 - **Receive for FWS or State pick-up**
 - **Amnesty program**
 - **FWS/State acknowledge relinquishment**



Public Awareness

- **Educational outreach**
- **Programs that**
 - **Clearly articulate issue**
 - **Explain risks and how to minimize**
 - **Provide user friendly identification aids**
 - **Provide guidance on what to do**



Public Awareness

- **Aquarium/Pond Magazines**
 - **Consumer**
 - **Hobby**
- **Pet Stores**
 - **Flyers/Fact Sheets**
 - **Posters**
 - **POP Handouts**
- **Pet Consumer Shows**
- **Aquarium Societies/Clubs**
- **Internet**





Codes of Conduct Best Management Practices

Codes/BMPs

Marine Aquarium Council

National Reptile Improvement Plan

National Avian Welfare Alliance

**National Pet Improvement Plan
(under development)**



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