

English Overview

English Products

46 percent of retailers surveyed said they carry English saddles, tack or apparel in their store(s). They reported these items to be their top five sellers:

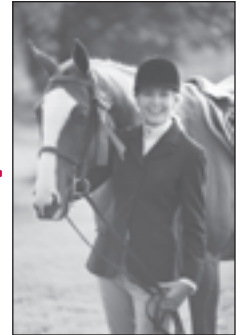
| | |
|---------------|-------|
| Tack..... | 45.3% |
| Saddles..... | 29.1% |
| Boots..... | 23.8% |
| Breeches..... | 17.4% |
| Helmets..... | 15.7% |

Switcharoos

English saddles jumped from fourth place with 22 percent in the 2004 State of the Market Report to second place this year, bumping boots and breeches down a spot.

Customer Profile

Who is the typical core English customer according to those surveyed? She is a female (97%) owns a horse (88%), and is a little more concerned with quality (45%) than price (36%).



What's Hot% stocking more in the next 12 months

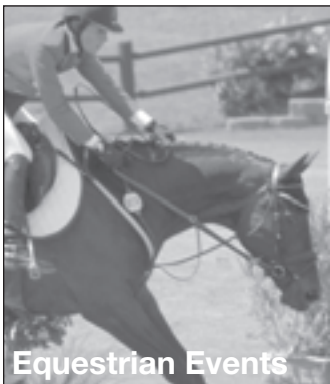
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|--------------------------|--------------|
| Helmets..... | 41.4% |
| Bridles..... | 32.0% |
| Saddle Pads..... | 31.3% |
| Bits..... | 30.6% |
| English-Theme Gifts..... | 30.3% |

The percentages in these categories remained relatively unchanged as compared to the previous year. That seems to point to the conclusion that retailers who said they would buy more of these English items in 2005 still are having trouble keeping them on their shelves, and that's a good problem to have.

And What's Not % stocking less in the next 12 months

| | |
|---------------------|--------------|
| Chaps..... | 10.9% |
| T-Shirts..... | 9.7% |
| Belts..... | 9.2% |
| Helmet Covers..... | 8.7% |
| Riding Jackets..... | 7.7% |

These categories also remained level as compared to the previous year, suggesting that retailers who stock these English items are still finding it challenging to move them.



Equestrian Events

When English retailers were asked if televised events such as the Olympics have an effect on their businesses, 79 percent said that they do not. Still, if 21 percent of businesses do enjoy an increase in sales due to televised events, that represents a significant impact on the industry overall. See page 25 of this report for retailer's comments.

Top English Suppliers

These ten companies/manufacturers of English goods were given the highest ratings by surveyed readers who buy their products.

- 1. WeatherBeeta USA**
- 2. JPC Equestrian**
- 3. J.T. International**
- 4. English Riding Supply**
- 5. Thornhill Enterprises**
- 6. Ariat International**
- 7. Toklat Originals**
- 8. Weaver Leather**
- 9. Schneider Saddlery**
- 10. Intrepid International**

English Retailers Say

"WeatherBeeta maintains stock in their warehouse and has a wide variety of products."

"JPC is friendly and flexible. 95% of what I order is in stock. Good prices, selection and quality."

"Of 200 vendors, about six are superior. Toklat service, innovation and quality combine to get my top vote."