

A market analysis of the equine eye care market in Germany

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Preface

In front of you lies the research on the topic "A market analysis of the equine eye care market in Germany". The inspiration for this market analysis was my employment with bitop Animal Health & Care GmbH, a company that was looking for new market opportunities.

It was written as part of my study of International Equine Business Management at Aeres University of Applied Sciences in Dronten.

With a deep sense of gratitude I would like to thank Annika Leschner and Eva Galik for all the opportunities of development and learning that they offered me at bitop Animal Health & Care GmbH. Thanks to them, I was able to apply what I had learnt straightaway in practice.

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My heartfelt affection also goes to my family and friends, who have always supported me during the completion of my thesis.

I wish you a pleasant reading,

Lea Hüser

September 9th, 2020

Table of Contents

Summary	6
1. Introduction.....	8
1.1 Trends.....	10
1.2 Target group	12
1.3 Distribution channels	14
1.4 Product types	15
1.5 Packaging.....	16
1.6 Active substances	16
1.7 Claims	16
1.8 Price.....	17
1.9 Sub-questions.....	17
2. Materials and methods	18
3. Results	22
3.1 Trends.....	23
3.2 Distribution channels	25
3.3 Product type and packaging	27
3.4 Active substances and claims	30
3.5 Price.....	32
4. Discussion of results.....	34
4.1 Trends.....	34
4.2 Distribution channels	35

4.3	Product types and packaging	35
4.4	Active substances and claims	36
4.5	Price	37
4.6	Limitations	38
5.	Conclusion and recommendations.....	40
	Bibliography.....	44
	Appendices	49

Summary

This paper aims to analyse the equine eye care market. The health of their horse is one of the most important factors for owners, which is a reasons why there is a huge market for care products. Since horse owners have a household income above average, they are willing to invest in care products. Even though worldwide 12% of the horses suffer from a chronic eye disease, the market for equine eye products has not received much attention so far.

In order to provide an orientation for potential investors and entrepreneurs this research elaborates the question: “How is the online market for equine eye care products structured in Germany?”. Based on the marketing mix, the trends, distribution channels, product types, packaging, active substances, claims and price are examined in greater detail. This is achieved by interviewing 7 experts and analysing 30 products from web shops.

From this research six major insights are identified. First, sustainability and usability are identified as rising trends among equestrians that impact their purchasing decisions. Second, owners are not well educated regarding the equine eye care, which is one reason why experts do not see a high market potential in this sector. Third, a multi-channel approach to distribution is expected, and there is under-used potential in dedicated web shops. Fourth, innovations in product packaging have excellent market potential. Easier-to-use sprays or eye-wipes would be attractive versus the standard plastic dropper packaging for equine eye care products. Fifth, there is potential for better alignment of the active substances and claims in equine eye products with market trends towards claims like natural, vegan and recycling, which are expected to become more and more prevalent. Last, pricing per packaging unit ranged from € 2.99 to € 51.85, indicating very little consistency across similar products and little impact on demand. This might indicate an immature niche market with room for mid-range price anchoring. The first estimate of the market potential identified an annual turnover of € 1,794,228.72 in negative scenario and € 8,223,609.24 in a positive scenario. However, a significant market potential can only be reached by educating horse owners about equine eye care. The next

steps recommended are an in-depth analysis of the target group using quantitative questionnaires and additional tests of the price as preparation of informed pricing decisions.

1. Introduction

Equestrians attach a high value to the health of their horses. As Dutch research shows 81% state that the horse's welfare is the most important factor for them. Equine welfare depends on three factors: emotion, natural behaviour and health (Timmers & Van Hal, 2019). This research focuses on the equine eye care sector, a part of the equine health care industry that has not received much attention so far.

The horse's eye is exposed to environmental influences (e.g. wind, dust, UV light, flies) which cause illnesses such as various symptoms, such as watery or red eyes, itchiness, swellings, light sensitivity, etc. These symptoms are indicators of conjunctivitis, corneal injury, chronic eye inflammation, allergies, irritations and parasites (see Table 1) (Hartog, Offereins, & Stolk, 2006; Stephan, 2019; VTG Tiergesundheits, n.d.).

Table 1: Common symptoms and causes for equine eye problems (VTG Tiergesundheits, n.d.; Hartog, Offereins, & Stolk, 2006; Stephan, 2019)

Symptoms	Causes
<ul style="list-style-type: none"> • watery eyes • red eyes • itchiness • swellings • light sensitivity 	<ul style="list-style-type: none"> • conjunctivitis • corneal injury • chronic eye inflammation • injuries • irritations • parasites • allergies <p>The symptoms might also occur from general diseases like metabolic disorders or coughing.</p>

The effects of these diseases range from mild symptoms up to clinical removal of the eye. Globally 12% of the horses suffer from chronic eye inflammation (Kibke, n.d.), but the amount of affected horses by general ocular complaints is higher. Eye irritation among horses can also be a reaction to allergens like house dust mites and pollen. Waldburger (2009) cites that 55% of the horses react on house dust mites and 22% on pollen. Hence, it may be assumed that between 12% and 55% of the horses are affected by ocular complaints. Research to date has not yet considered the role of the country, the climate, the stabling conditions and the frequency of problems. There is a limited number of products on the

market for treatment, but these are rarely specialised in horses. Therefore, horse owners express a need for equine eye care products and tend to look for alternative products outside the equine care market. The alternatives can be divided into three areas: human products, home remedies and secondary products such as fly masks. It is difficult for companies to acquire an overview of this sector, as little data is available on the equine industry (Ikingier, Wiegand, & Spiller, 2013). A potential reason for this might be that equine entrepreneurs are often involved in the industry because of passion, and facts and figures count for less.

The objective of this research is to provide data and insight for potential investors in the equine eye care industry, such as venture capital providers, existing companies interested in investing in a new product, and entrepreneurs. Collected data shall enable them to create solutions for frustrated horse owners. Hence, this research will analyse the market for equine eye care products.

The research focuses on the online market which provides the most up-to-date information, which is important for potential investors and entrepreneurs (Magerhans, 2016). It is possible to access data on a global level, even though the focus of this research will be on the German market opportunities, as this research is intended as a starting point for emerging companies in this region. These limitations lead to the following research question:

How is the online market for equine eye care products structured in Germany?

This research is intended to provide a baseline for businesses wishing to enter the market for equine eye care products in Germany. In the launch phase, the marketing mix is becoming increasingly important, as the sale of products can be accelerated by a targeted communication, a well-chosen introductory price and the availability of the products in the appropriate distribution channels (Magerhans, 2016). The marketing mix consists of the four Ps: price, product, place and promotion, as shown in Figure 1 (Verhage, 2018). The following part of this paper moves on to describe what is already known about the marketing mix in greater detail. As only few data is available in the equine

eye care products market, additional data concerning the market for care products for horses and pets are consulted in the literature research.



Figure 1: The marketing mix and relevant topics for launch strategies.

1.1 Trends

One part of a market analysis is defining current trends as they are indicators for the growth and future perspectives of the industry. Flores (2017) identified four trends for the pet care industry:

- premiumisation
- the rising power of e-commerce
- focus on health
- green, clean and certified

According to the author, it is assumed that *premiumisation* will lose importance in the long term, but currently there is a high degree of specialisation. Especially among grocery retailers, which usually concentrate on the mass market, there could be seen an increase in premium products. The author states that premium products for the broad market will become a trend.

The *rising power of e-commerce* is a trend that impacts the vast majority of markets. Internet retail, in particular, is experiencing a massive expansion worldwide, especially among the millennials, the generation roughly born around the 1980s and 1990s. E-commerce provides new opportunities to gain an emotional bond with clients. An example is the company *chewy.com*, which sends cards to its customers on various occasions, like birthdays and holidays (Flores, 2017). This trend of personalisation is also mentioned by the *Hippische Monitor* in the further course of this paper.

Besides, there is a stronger *focus on health*, which is particularly relevant for eye care products. Nowadays, animal health is no longer defined solely in terms of physical health but includes a holistic approach that considers the psychological well-being of the animal. Furthermore, claims as “natural”, once a sign of the premium sector, has now become mainstream. Especially well-educated owners, as most of the horse owners are (see chapter 1.2), like to inform themselves about the ingredients. According to the author, it will become fundamental to take up efforts to educate the owners. Possible e-commerce channels can be blogs, videos and social media.

Green, clean and certified is a trend seen in the human industry that is currently influencing the animal industry as well. Consumers favour organic products, but they have difficulties to identify an organic product among conventional ones. It is, therefore, becoming increasingly relevant to draw up comprehensible lists of ingredients, i.e. short lists, with ingredients that are recognisable and necessary for the consumer. Additionally, it is advised to use claims helping the customer to distinguish between competitors (Flores, 2017).

In order to gain further insight into the equine sector, trends from the Dutch magazine *Hippische Monitor* were used. It describes the following 3 trends for the year 2018 for the equine industry in the Netherlands:

- globalisation & digitalisation
- green
- personalisation

Due to the globalisation and digitalisation of companies, the economic power shifts from west to east, as China and the United Arab Emirates emerge. This is a chance that opens opportunities at new markets, but also a threat as competition intensifies. As Flores already defined for the pet care industry, a green image of the company or the product is also a trend in the equine industry. Even though sustainability is progressing slowly compared to the human industry, digitalisation and the changing attitude in the society are creating new opportunities and urge for change. As the last trend, Van Hal & Timmers (2018) mention the growing need for personalisation: due to digitalisation, customers expect a personalised shopping experience, something that especially larger platforms as Facebook, Twitter, Uber and Airbnb are particularly successful in.

1.2 Target group

Another aspect of a market analysis is to define the possible target group (Magerhans, 2016). The Horse Future Panel described, in 2017 the equine target group as visualized in Figure 2 (Münch, Wiegand, Knaup, Steffen, & Hörwick, 2017). According to the Horse Future Panel (2017), 87% of the equestrians in Germany are feminine. Furthermore, they have an above-average level of education and a high household income. Additionally, equestrians prefer to gather information via the internet, while the general population prefer friends and their network to gather information about their hobbies.

Horse-friendliness plays an important role for equestrians, which is partly a reason for their dissatisfaction with the equine industry. Furthermore, above 65% are dissatisfied with the stabling conditions in Germany. They would rather prefer group stabling, which is according to them not available in a sufficient quantity. These stabling conditions are relevant causes for eye problems among horses. Especially when kept individually, horses are kept in stables and here the amount of dust generated by bedding and closed rooms is higher than outside. This increased dust exposure may lead to irritations of the eye.

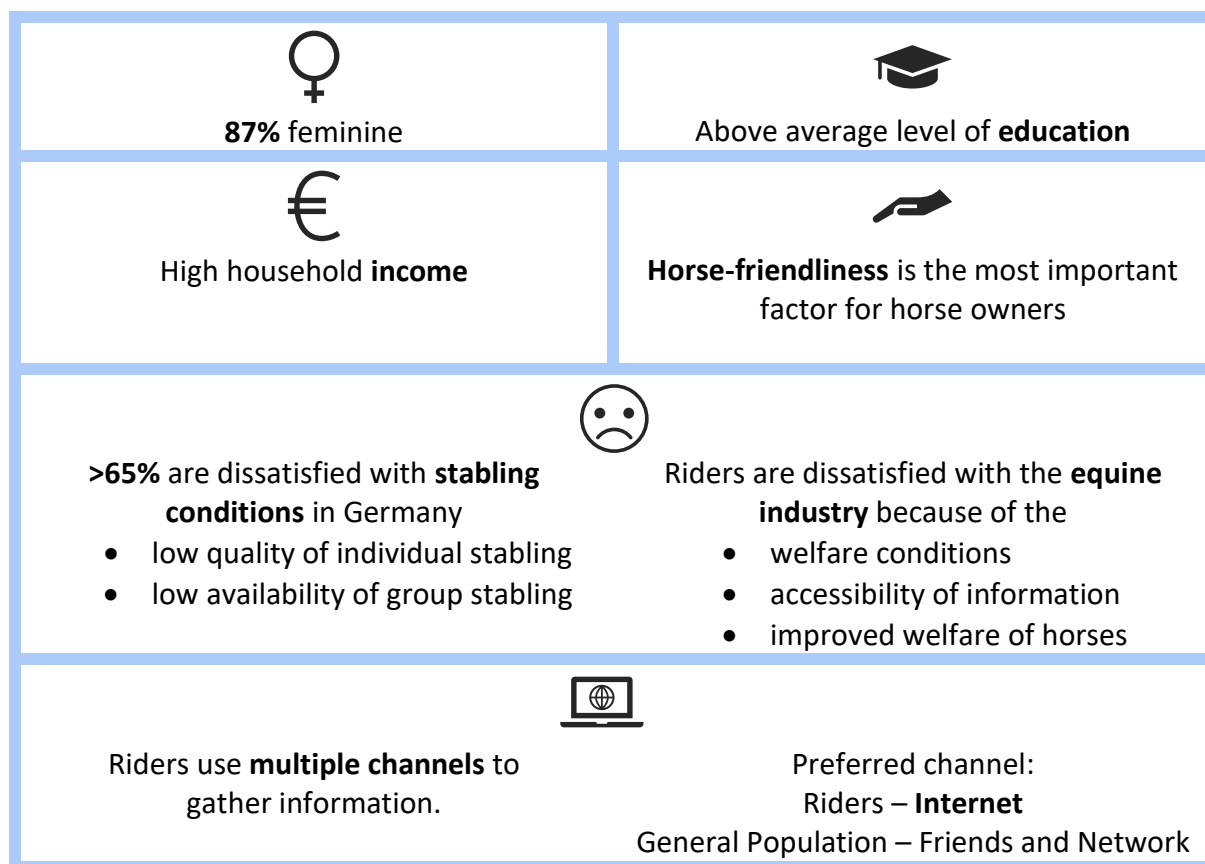


Figure 2: The equine target group

To gain additional insight in the target group, further advice and information were collected in internet forums and on Instagram. This type of market research was defined by Pepels (2011) as especially useful for market decisions in the social media context. Among these findings, equestrians reflect their frustration with the handling of eye drops on horses. User Katrin explains: “I’d rather put a nose plug on before it turns into a fight. You’ll only hurt your horse with all that fidgeting.” and also Andrea faces problems: “We have to hold my mare with two people to give her the eye drops.” (Andrea & Katrin, 2001). Figure 3 displays a demonstration by Nina Steigerwald (2019) of how horses can be trained to accept the application of eye drops. These are only a few examples, but they might be an indication for the high need for usability among the whole target group that companies can take advantage of.



Figure 3: Picture on Instagram from a demonstration on how to apply eye drops (Steigerwald, 2019).

In order to perform a market potential analysis, for example, future investors and entrepreneurs must be able to determine the size of their potential target group. Therefore, the target group is estimated on the basis of known facts. In Germany there are about 900.000 horse owners, who are the potential customers for eye care products (FN, 2020). Globally 12% of the horses suffer from chronic eye disease, but 55% show a reaction to house dust mites. The number of horses that need eye care products may be estimated in between, thus between 108.000 and 495.000 horse owners could be potential customers in Germany. It may be assumed, that not all owners buy eye care products for their horse. Horses that are held in stables are usually exposed to more dust than horses that are held outside. In Germany about 60% of the horses are kept in stables (Hölker, Wiegand, Münch, & Spiller, 2017), this would result in a target group between 64.800 and 297.000 potential customers. In order to define the target group further there may be made further assumptions as for example that the emotional riders are more prone to buy care products than rational riders. According to the Dutch Magazine "Hippische Monitor" 83,3% of the riders may be categorized as emotional riders (Van Hal & Timmers, De waarde van welzijn, 2019). Subsequently, there are 53.978 up to 247.401 potential customers for the equine eye care market in Germany.

1.3 Distribution channels

Another part of a market analysis is the place where the product is sold. This paper examines which online channels are used to sell the products and to communicate with customers in the equine care

industry. Although the focus is on e-commerce, offline channels are not excluded as they may be linked with online channels. Examples from the equine industry are *Kraemer* and *Loesdau*, which are two of the main retail stores in the German horse sector, that also sell online.

Regularly used care services in the pet industry are feeding advice, insurance, foras and most common the vet. Overall, research shows that the “multichannel approach” is rising as owners do not inform themselves exclusively through one single channel anymore (Flores, 2017, p. 18). A multichannel approach in the equine care sector includes at least five relevant channels: veterinarians, internet, trade fairs, stationary trade and social media. As this paper concentrates on the online industry, the focus will be on identifying webpages that are used for online retail. Research by Münch (2015) on online distributors of equine equipment and care products has shown that *eBay*, *Amazon*, *Loesdau* and *Kraemer* are the main retailers, followed by special dealer websites, the shops from the manufacturers and online pharmacies (see Annexe A). Within the framework of primary research, further details are to be investigated and further specialisation in eye care products is to be achieved.

1.4 Product types

There are different routes of application available to protect the eye and to treat eye disorders, such as drops, gels and ointments. Product types and application vary according to their intended use. As there is no specific data for eye care products available for the equine sector, the equine skincare industry was consulted as a comparison. According to Münch, et al. (2015), 85% of the equestrians use ointment and creams for their horse’s skincare and 63% use shampoos. Fly repellents usually are sprays (97% of all products). “Generally speaking, it is expected that products which benefit pets and owners alike or underline their special bond, will register stronger growth.” (Flores, 2017, p.5). The choice of a product type depends not only on the user-friendliness of the product but also on the comfort of the animal on which it is used. Sprays, for instance, might be easier for the customer to use, but only if the horse feels comfortable with this treating method and does not show panic reactions. Likewise, this plays an important role in the selection of the packaging.

1.5 Packaging

Product packaging is relevant for companies wishing to enter the industry. Research to date has not yet determined the common size and type of the packaging of equine care products, but one research was found that assesses the characteristics of product packaging. In this questionnaire published by Münch (2015), more than 780 equestrians were asked to rate the importance of seven attributes of product packaging (see Annexe A). Most important to them was usability, which is consistent with Flores' statement that products should benefit owners and animals alike (see chapter 1.4). These attributes were followed by the breakage resistance of the packaging, the fact that the packaging is environmentally friendly, the availability in a refill pack and the size of the packaging. Less important for the equestrians was the fact that the packaging is disposable or reusable, although these points could be considered part of environmentally friendly packaging.

1.6 Active substances

The main active substances will be defined in the sample research. The literature review defines trends regarding the ingredients of pet care products. First, the customers prefer short ingredient lists as they aim to understand what is inside the products. Therefore, they prefer more natural ingredients as they are easier to understand. Especially regarding artificial preservatives and flavourings criticism among customers is increasing (Flores, 2017).

1.7 Claims

For companies entering a new market, it is essential to know the common claims that are important for their target group. Münch (2015) asked more than 500 equestrians to rate characteristics that are important for them when purchasing horse equipment and care products (see Annexe A). As a result of this study, the most important demands on the care products were effectiveness, quality and skin compatibility. The product's brand only plays a minor role. Other claims that play a role in the equine care industry are handling, price-performance ratio, long-term effects, biological and natural

ingredients and the compliance with the German anti-doping and medication rules (ADMR) published by the *Deutsche Reiterliche Vereinigung* (Fédération Equestre Nationale, FN). They are part of the performance examination regulations (Leistungs-Prüfungs-Ordnung, LPO) and thus important for competition riders, as their horses can be tested for the ingredients listed and may be excluded from the competition (FN, 2020).

1.8 Price

The pricing policy is of particular importance in the marketing mix since the success of pricing decisions is measured exclusively by demand. If prices are set too high, demand decreases or, in the worst case, the company is unable to sell products at all. Therefore, companies need to ensure the best possible pricing decisions (Magerhans, 2016). As there was no convenient data found on pricing in the equine eye care sector, this research collected the prices in the primary research.

1.9 Sub-questions

The literature review has provided a first insight into the existing data. Through further primary research, more specific information for the equine eye care industry is gathered. Due to the scope of this paper, this research did not examine the target group in further detail.

In order to perform a further investigation on these topics, five sub-questions were defined:

1. What are superordinate trends in the equine care industry?
2. What distribution channels are used for online distribution of equine eye care products?
3. What product types and packaging are most commonly used for equine eye care products?
4. Which active substances and claims are advertised among equine eye care products?
5. What is the average price of equine eye care products?

2. Materials and methods

This research examined an analysis of the online market for equine eye care products in Germany. The research design was an explorative study, as the research subject is still relatively unexplored and is intended as a preparation for in-depth market research (Homburg, 2012). To gain a representative picture, there was made use of two research methods: expert interviews and a market analysis. Secondary research was carried out as a starting point to access existing data and was described in the introduction. This research formed the basis for the primary research. Due to time and budget limitations, it was not feasible to conduct a high-quality, primary and quantitative study. Therefore, primary internet research was carried out in which equine eye care products were analysed according to the sub-questions. The products that were included in the analysis may also be used for other animals, but should mention horses as a target group, as there are almost no products exclusively for horses. Magerhans (2016) mentions internet research as a valuable method to gain market influence for information acquisition and (online) marketing decisions. Additionally, two types of qualitative expert interviews were conducted. The first interviews took place in February 2020 to gain a first insight into current trends in the equine eye care industry. The second interviews were conducted in August 2020 to provide further insights and new perspectives on the topic. The following part of this paper moves on to describe the research methods per sub-question in greater detail.

First of all, the trends and suggestions from the industry were collected by interviews and online research. For the first interviews the experts were employees of companies with horse care products, which were interviewed at the spoga horse in Spring 2020, an international trade fair for the equine industry. The spoga horse was chosen as it is a trade fair with trade visitors only, who are expected to have a high level of expertise. (Böse, n.d.). The second interview partners were contacted by phone due to the corona pandemic. Here, the aim was to gain a broad insight, meaning that experts were selected from various fields. The goal was to get in touch with a veterinarian, a person that engages in public for horses with eye problems and an employee in an equestrian retail store. All interviewees

have in common that they have direct contact to customers, what was not always the case with the interviewees from the first interviews, as they were employees from equine care producers.

Moreover, the expert interviews were unstructured as they were meant to discover trends and indications, to “develop a better understanding of the interviewees’ social reality from the interviewees’ perspective” (Zhang & Wildemuth, 2017). Several companies were interviewed with the intention to get a broad and detailed impression of the current market situation. To obtain valid research data, preparation is crucial, even for unstructured interviews. The basic structure for these interviews is attached in Annexe B. These preparations consisted of a “clear list ... with questions”, but the answers were “open-ended and there is more emphasis on the interviewee elaborating points of interest” (Denscombe, 2005, p.166).

Besides the interviews, a product analysis was conducted to answer the other sub-questions. Equine eye care products were analysed according to the subquestions regarding their channels, product type, packaging, active substance, claims and price. These product features were collected and sorted in subcategories (see Annexe C). During the research, the subcategories were constantly adapted to ensure that no essential information was missed.

The second sub-question explores the distribution channels. For this reason, the channels which have already been mentioned in the introduction, *eBay*, *Amazon*, *Kraemer*, *Loesdau* and the distributors' webshops were used as subcategories. Further distribution channels were registered under the subcategory "different" to ensure that all relevant channels are recognised.

The third sub-question deals with the product type and packaging. The subcategories for the product type were drops, gel, ointment and “different”. In literature, there was no specific data found concerning product types regarding equine eye care products. Additionally, there was collected data concerning product packaging. As described in the introduction, only data describing the attributes of the packaging were found, but not on the packaging itself or the filling volume. This topic has two levels of analysis. The first level consists of two subcategories: the packaging unit (PU) and the packaging

itself. These are each divided into four further subcategories. Regarding the packaging unit, it was first recorded whether the data is collected in ml or g. Moreover, the filling volume is specified as 5, 10 or “different”. For the packaging itself, the categories squeeze bottle, tube, single-dose ampoules or “different” were defined.

The fourth sub-question concentrates on the active substances and claims that are used. In literature, only trends have been defined, but not yet the specific active substances. Consequently, all active ingredients were included in the study and then the most frequently used ones were identified. Subsequently, the most common claims in equine care products were examined. Literature mentioned effectiveness, quality, skin compatibility, handling, price-performance ratio, long-term effects, biological and natural ingredients and the compliance to the German Anti-Doping and Drug Control Rules (ADMR) as common claims. For the subcategories, these were adapted for the equine eye care industry, where, for example, skin compatibility claims are not relevant. Hence, the subcategories are effectiveness, quality, usability, biological and natural ingredients and ADMR compliance, but it was planned to adjust the subcategories if necessary.

The last sub-question defines the average product price. This will be calculated per packaging unit and per 10 ml or 10 g to gain comparable data.

For this analysis, no data on the market size was found. The equine eye care market is comparably small and therefore all products that were considered suitable were taken into account. The selection of products was heavily influenced by the Google algorithm, as products that are not placed by Google cannot be found online.

All these measures were intended to create a picture of the market of equine eye care products online. It was scheduled to collect data during two months starting from the 6th of January until the 15th of August 2020. The time frame has been designed to ensure that the spoga horse, that takes place from 8th to 10th February, dates at the start of the research phase. For this reason, on the one hand, there was sufficient time before gaining insights and finding valuable research questions, but on the other

hand, there was a sufficient amount of time afterwards to process the input and connect the findings. The interviews at the spoga horse provided an initial orientation, while the second interview cycle focused on an in-depth examination of specific questions.

3. Results

In order to provide an overview of the equine eye sector for potential investors and entrepreneurs, the results were collected according to the sub-questions (see chapter 1.9). For the trend section, three expert interviews were conducted at the spoga horse (see Annexe F) and four expert interviews were held by phone (see Annexe G). In order to acquire interviewees, there was made contact with 17 companies and persons, a list of the persons and companies that declined an interview is attached in Annexe H. The interviews at the spoga horse fair could not be recorded due to high noise levels, but the secondary telephone interviews were recorded and transcribed. At the beginning, the respondents were asked for their permission to record the interviews. The respondents were interviewed in their mother tongue German to prevent communication problems and restraints. Afterwards the interviews were translated into English. It was possible to acquire a vet, who is even a member of the International Equine Ophthalmology Consortium (International Equine Ophtalmology Consortium, 2016). Furthermore, it was possible to interview two persons who engage themselves for blind horses and horses with eye diseases. Lastly, the aim was to interview an employee from one of the main equine retail stores in Germany: Loesdau or Kraemer. As both refused an interview a person that works in the German Marketing from a Dutch retail store called Epplejeck, was interviewed. The details about the second interviewees are summarized in Annexe E. For the market research there were 30 products analysed (see Annexe D). The sample size consists of all products that were detected. The small sample confirms the assumption of a comparably small market size. During the research adaptations of some of the subcategories, especially the ones concerning the claims, were made. Furthermore, there was conducted an additional literature research regarding the functions of the active substances. This information could not be gained beforehand, because the substances were unknown, but it is considered especially useful in linking the substances with the claims.

3.1 Trends

The results taken from the spoga horse 2020 visit comprise two aspects. The first aspect consists of general impressions regarding innovations and new products that are presented at the spoga horse. The second part includes the expert interviews.

The essential impression of the spoga horse was that sustainability is a trend among horse care products. This concerns both the packaging and the ingredients. An example of this trend was the booth of *Zedan*, a horse care brand. The entire booth was “natural” in design and had a “refill bar” as an example of more sustainability in grooming products (see Figure 4). Moreover, horse care manufacturers also promoted the naturality of their ingredients.



Figure 4: A “refill-bar” at the spoga horse.

Furthermore, it is assumed that the equine eye care market is a niche market. This impression was confirmed at the spoga horse, as only one product for equine eye care was displayed there.

A total of three expert interviews with employees of *leovet Dr. Jacoby GmbH & Co. KG*, *Bense & Eicke GmbH & Co. KG* and *MM Cosmetic GmbH* were conducted (see Annexe F). These are all German companies which focus on horse care products and are therefore considered as experts.

The first interview was held with an employee of *leovet Dr. Jacoby GmbH & Co. KG*, a company known for its brands *leovet* and *Equinatura*. He pointed out as a disadvantage that they had more problems with allergic reactions because of the natural ingredients. Furthermore, globalisation is not a new trend for him. The company already sells worldwide, and he identifies particular potential in Middle East cities like Dubai. As another trend he mentioned that usability is gaining more attention, hence, they

are currently launching a new spray that brings this to the fore. Horses tend to show panic reactions in connection with sprays (see chapter 1.2) and their new product sprays "softer" and is supposed to reduce these reactions.

The second interview was conducted with an employee of *Bense & Eicke GmbH & Co. KG*, a company known under the brand names *B+E* and *Parisol*. The major trend of sustainability and globalisation was mentioned likewise by *leovet*, although globalisation is not new to them either. *Bense & Eicke* is already represented abroad, including countries such as Switzerland and the United Arab Emirates (UAE). Their respective marketing strategies differ in several countries. One example is their cooperation with influencers, which they have limited to Germany.

The third interview took place with *MM cosmetic GmbH*, known under the brand name *Zedan*. They did not focus on the term of sustainability, but rather on the importance of a natural composition of the products. In order to prove their quality and their natural composition, they use different labels, which are adopted from the human sector, as there are no corresponding labels for the equine industry. Beyond this, *MM cosmetic GmbH* also highlighted the potential in the UAE as a global perspective.

In addition, respondents from the phone interviews were asked about the current trends (see Annexe G). The answers differed since they all represent different points of view. Dr. Jürgens, who is a veterinarian specialised in ophthalmology sees that "there have recently been some veterinary eye ointments and drops that are approved for animals.". She also explains that pharmaceuticals for horses have to be preferred over medical products for humans, at least when they are listed in the „Tierärztliche Hausapothekenverordnung“. This applies even if it is known that the product for humans works better. E. Droost describes, however, that she mainly uses human products for her horse: "Since it helped very well, I used it on my horse.". Likewise, R. Müller combines equine care products with human products: "Both veterinarians and most pharmacists recommend the use of human eye drops, ...".

Furthermore, L. Herrmann-Deckert sees a trend towards specialisation and says that there are more specialised products available for horses. Moreover, none of them agrees with the trend towards sustainability.

All respondents at the spoga horse agreed on globalisation as a trend and, to a certain extent, on sustainability. The respondents from the second interviews did not see this trend in the eye care sector, and R. Müller recommends single dose units as she focusses on sterility (see Annexe G). None of the company representatives saw a relevant business opportunity in the equine eye care market. N. Jürgens and R. Müller agree in this point. As R. Müller states “I don’t think there’s a high demand for equine eye care products. Exactly this is the advantage with animals, through all the medicines for humans all possibilities are already given.”. Only L. Herrmann-Deckert sees the growing interest from customers. “I assume that an increasing number of people will look for it, simply because there are more and more horses with eye problems.” and she considers this to be a seasonal phenomenon “... you will soon see that there are a lot more watery and swollen eyes, in particular in the summer with all the flies.”. Furthermore, two of the respondents indicate that owners do not notice if there is a need for eye care. L. Herrmann-Deckert describes that “I think that some people ignore the problems, especially if it is just a watery eye.” And R. Müller explains that “ „Most owners don't even notice when the horse has dry eyes.”.

3.2 Distribution channels

The following chapters display the results of the primary internet research and the secondary interviews. The products analysed are listed in Annexe D.

Regarding the distribution channels R. Müller pointed out social media as a first point of contact. The distribution channels used to sell the products were identified in the market analysis (see Figure 5). As mentioned by Flores (2017) a multichannel approach is rising and this market research shows that 43% of the products are sold on more than one website. The research indicates that the online shops *fütternundfit* and *Amazon* are the most common distribution channels for equine eye care products,

as they are each used by 40% or more of the analysed products. They are followed by the platform *MedPets* with 23%. Subsequently, the website from the distributor, *Covetrus*, *Shop Apotheke* and *Sanicare* are used by 13% of the analysed products.

Followed by *Wdt*, *Pet Physio* and *Kraemer* with less than 10%. Remarkably, even two of the major retail stores in Germany (*Loesdau* and *Kraemer*) have barely any eye care products in their portfolio. In February 2020, *Kraemer* had a single eye care product, *Loesdau* had nonavailable. Both companies refused to give an interview, but *Kraemer* indicated that it would be better to focus on a different topic in the equine sector. They considered eye care as a too small market (see Annexe H).

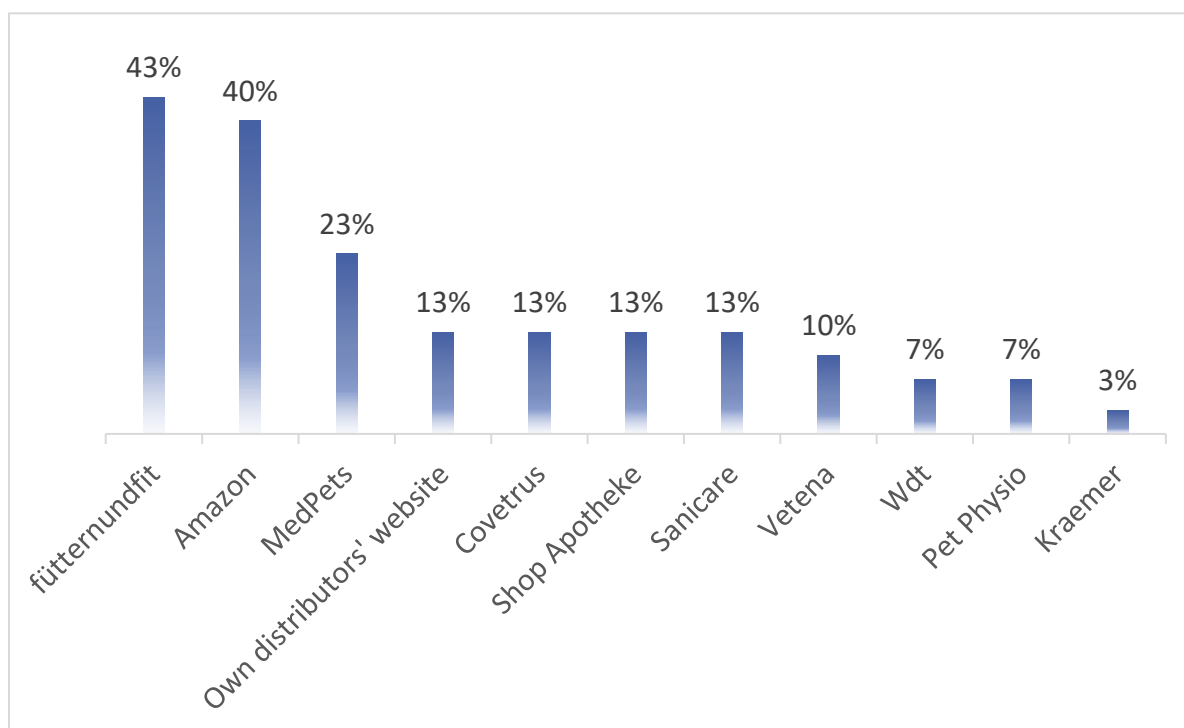


Figure 5: Distribution channels from the market analysis (n=30).

3.3 Product type and packaging

The following section moves on to analyse in greater detail the product type and packaging. This research identified that 60% of all eye care products are drops, making them the most common product type. These are followed by ointment and gel with 17% each, as shown in Figure 6.

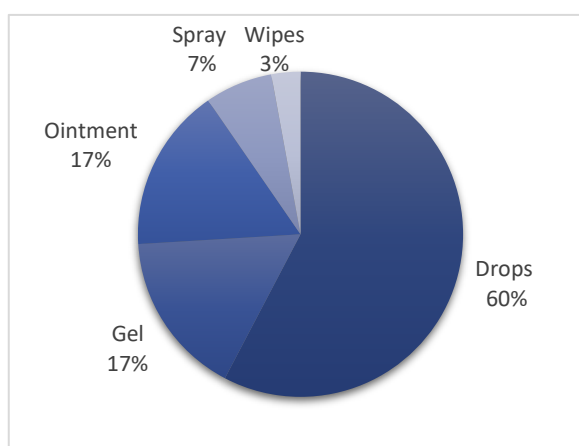


Figure 6: Product types from the market analysis (n=30).

An unexpected result is that there are also wipes and sprays available in the market, which account for 10% of the market share. However, in the equine industry, the application of eye drops might raise some difficulties, as horses usually do not cooperate well when these are applied in their eyes. Therefore, companies have developed tools to assist both horse and rider in the application of eye care. One example is the company *VTG Tiergesundheit*, that sells an ultrasonic nebuliser for animals (see Figure 7). It nebulizes the product so that customers have no direct contact with the horse's eye, panic reactions are avoided and thus the risk of injury is reduced (VTG Tiergesundheit AG, n.d.).



Figure 7: A product example that claims usability (VTG Tiergesundheit AG, n.d.).

Another example are the “Augenreinigungstücher” from *Kraemer* shown in Figure 8. They are applied onto the eye, what avoids the direct contact with the eye (Kraemer Pferdesport GmbH & Co. KG, n.d.).

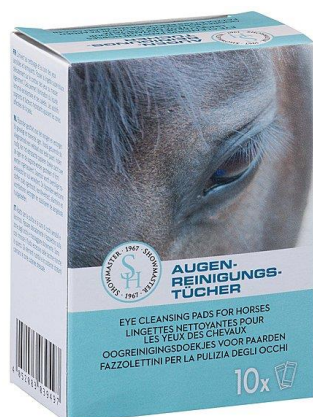


Figure 8: A product example for the eye wipes (Kraemer Pferdesport GmbH & Co. KG, n.d.).

The interviewees, that were interviewed by phone all mention the need for wet wipes such as the ones that *Kraemer* offers. R. Müller indicates that they are the only product type that is needed in the market: “I do not see such a high demand. The only thing I noticed which is missing, is a possibility to wash the eye externally.” According to her “the horse's eyes must be cleaned externally before the drops are applied.” (See Annexe G). Here she sees an opportunity for eye products. Furthermore, N. Jürgens describes that horse owners prefer ointments rather than drops, whereas the opposite is the case with small animals.

The packaging of a product contains various aspects and depends on the type of product. Therefore, the products were sorted into drops, gel and ointment, as these types require different packaging. The eye sprays and wipes are packed differently.

Table 2: Packaging from the market research.

	Drops	Gel and Ointment
Filling volume	10ml (44%)	5g (30%)
Packaging	Plastic squeeze bottle (72%)	Tube (80%)
	n = 18	n = 10

Table 2 displays that about 44% of the drops had a filling volume of 10 ml and 72% were packed in a plastic squeeze bottle, as for example the product “Animaldrops” from *Breitbart.tv Produktionsgesellschaft GmbH* (see Figure 9).

Furthermore, 10% of the drops were packed in single dose ampoules and 7% were packed in glass bottles with a pipette. Examples for these packages can be found in Figure 10 and Figure 11.

A total of 30% of the gels and ointments had a filling volume of 5 g and 80% were packed in a tube, as shown in Figure 12.

The other gels and ointments were packed in OSD Squeeze bottles or in plastic injectors as the ointment *Vetoscon* in Figure 13.



Figure 9: Example for a plastic squeeze bottle for eye drops (BREITBILD.tv Produktionsgesellschaft GmbH, n.d.).



Figure 10: Example for single dose units (Onlinepets B.V., n.d.).



Figure 11: Example for eye drops in a glass bottle with a pipette (cdVet Naturprodukte GmbH, n.d.)



Figure 12: Example for Ointment in a "Tube" package (Shop-Apotheke B.V., n.d.)



Figure 13: Example for ointment in plastic injectors (Covetrus DE GmbH, 2020)

R. Müller describes that, in her opinion, the single dose units are preferred because they remain sterile and the packages that have not been opened can be stored for longer (see Annexe G). Moreover, she indicates that there is a need for dropper bottles with a shorter neck in order to prevent injuries and the contamination of the bottle. N. Jürgens does not describe this problem in the context of the packaging, but she indicates an application problem. She sees here “the main difference” in comparison with products for small animals (see Annexe G).

3.4 Active substances and claims

As part of the market analysis, the active substances and claims of the products were examined. Figure 14 lists the most common substances. Hyaluron is the most commonly used ingredient with 40%, and other active substances are Euphrasia officinalis, colloidal silver, vitamin A, chamomile and dexpanthenol. These results are consistent with the results from the interviews, as the respondents also named hyaluronic acid, Euphrasia officinalis, dexpanthenol and colloidal silver. Cortisone was also mentioned, albeit negatively, as it was associated with side effects such as a secondary glaucoma. E. Drost also confirms the trend towards less and natural ingredients (see Annexe G).

Hyaluron is a substance that is commonly used as a moisturizer in cosmetics and care products (Kawada, et al., 2014). The second substance, Euphrasia officinalis (synonym: eyebright) is used in

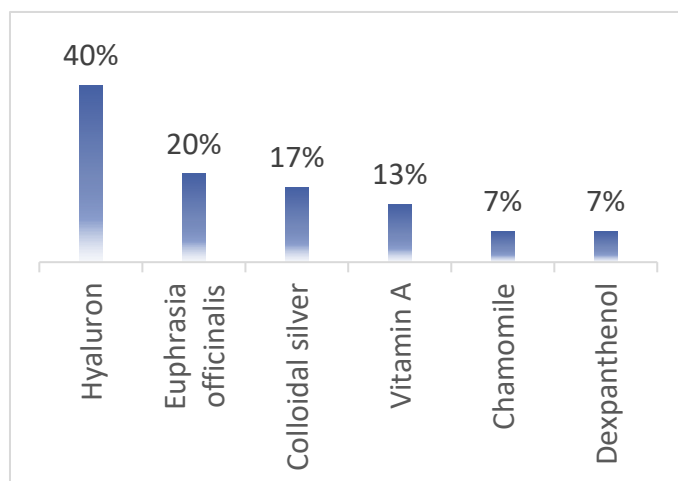


Figure 14: Active ingredients from the market analysis (n=30).

veterinary homoeopathy, where it has been utilized for the treatment of eye and stomach diseases (European Agency for the Evaluation of Medicinal Products, 1999).

The next active substance is colloidal silver, which are nanoparticles of elementary silver. Silver, in general, is ascribed a positive effect on wound healing and to enhance the effect of antibiotics (Deutsches Ärzteblatt, 2013). Vitamin A is known to be an essential vitamin for vision (European Agency for the Evaluation of Medicinal Products, 1998). The two remaining ingredients are chamomile and dexpanthenol. Chamomile is also used in traditional medicine and is known to treat skin lesions, eczema and inflammation. Dexpanthenol is used as an anti-inflammatory substance, that accelerates the wound healing (Hahne, 2012) (see Table 3).

Table 3: Functions of the active substances.

Active substance	Function
Hyaluron	<ul style="list-style-type: none"> moisturizing
Euphrasia officinalis	<ul style="list-style-type: none"> treatment of eye diseases treatment of stomach diseases
Colloidal silver	<ul style="list-style-type: none"> wound healing enhancement of the effect of antibiotics
Vitamin A	<ul style="list-style-type: none"> essential Vitamin for vision
Chamomile	<ul style="list-style-type: none"> treatment of skin lesions treatment of eczema treatment of inflammations.
Dexpanthenol	<ul style="list-style-type: none"> anti-inflammatory accelerates wound healing

In order to position a product in the market, it is essential to identify the claims of competitors. The most common claim with 40% is a cleansing effect, followed by a moisturizing effect and support for corneal infections with 30% (see Figure 15). Less than 3% of the analysed products are basing their claims on studies. Furthermore, less than 3% are claiming recyclability, a post-surgical use, the use

during anaesthesia, a brightening effect for horse shows, usability and the use of probiotic bacteria.

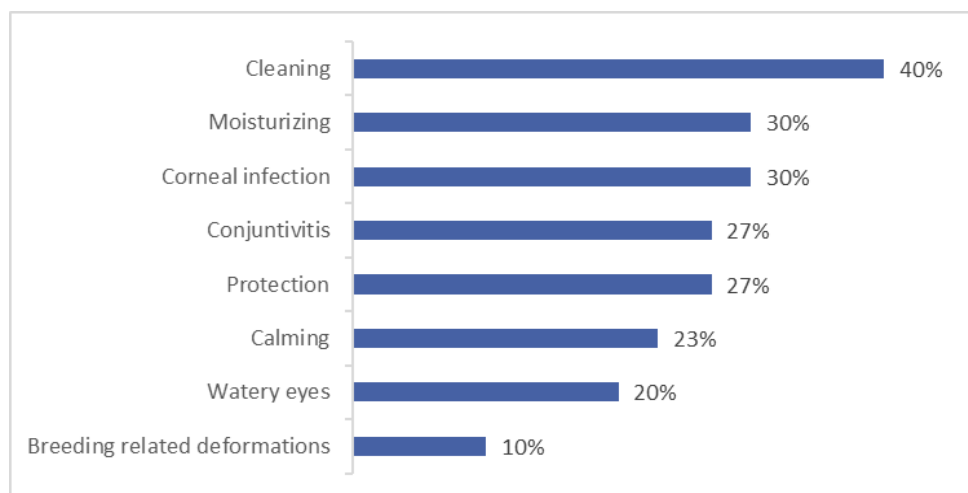


Figure 15: Claims in the market research (n=30).

During the interviews, the respondents indicated several claims that are important for them and their customers. A moisturizing effect was described by three of them. Furthermore, they talked about the appropriate ph-value, sterility, prevention, effect on allergies and protection against UV-light. E. Drost explains that it is important for her “... to be able to use it [the care product] at the same time as the medicine prescribed by the vet.” and that she wants to have a product that she can use for her dog and her horse at the same time. In addition, N. Jürgens points out that some horses need to be brought to a clinic in order to apply medication regularly, because „locally applied medication disappears quite quickly due to the closure of the eyelid and the tear flow“. The use of medication several times a day is not feasible for the majority of horse owners as their horses are not kept near their homes. Although this is of primary importance for pharmaceuticals, it certainly applies to the care industry as well, since these products also disappear quickly.

3.5 Price

For companies that aim to enter a new market, it is essential to know where the competitors stand in terms of pricing. The average product price per packaging unit (PU) was € 16.62 and per 10 ml or 10 g € 10.23 (see Table 4). The price range per PU lies between € 2.99 and € 51.85. The price per 10 ml or 10 g shows smaller variations (€ 1.20 to € 28.81). According to the study design, the price for 10 ml or 10 g should be analysed, but regarding the average PU, 10 ml is more appropriate. Additionally, the

average price for the different product types was analysed, which shows that gel is the most expensive product type, averaging € 20.20 (see Table 5).

Table 4: Average prices

	Average price	Price range
per PU	€ 16.62	€ 2.99 to € 51.85
per 10 ml or 10 g	€ 10.23	€ 1.20 to € 28.81

Table 5: Average prices per product type

Product type	Average Price
Drops (n = 16)	~ € 9.83
Ointment (n = 5)	~ € 12.83
Gel (n = 2)	~ € 20.20
Spray (n = 1)	~ € 4.42

The next chapter moves on to compare the findings with the literature to provide a critical reflection.

4. Discussion of results

This research aims to provide data and insights for potential investors and entrepreneurs so that they can create solutions for equestrians. Therefore, this research analysed the market for equine eye care products. The results are discussed according to the sub-questions and compared with the findings from the literature.

4.1 Trends

By comparing desk research with the findings from spoga horse, similarities can be found as both highlighted the trend towards sustainability. However, the second interviews did not reveal this trend. Furthermore, both pointed out that usability is an important factor for equestrians. Regarding the indications horse owners declared their frustrations with the handling of eye drops. Even though there were no innovations among eye care products at the spoga horse, *leovet* is aware that a “softer” suspender may be important for clients. The problem of application was similarly described by R. Müller and N. Jürgens and will be discussed further in chapter 4.3.

It is somewhat surprising that all experts except L. Herrmann-Deckert doubted the market potential of equine eye care products and that there was only one eye product found at the spoga horse. The market is rather small, but as shown in chapter 3.1 Trends, the owners are quite frustrated and searching for a solution. These opinions should be considered by companies but may also be seen as an unawareness of the experts for this specific niche market. In addition, two of the experts mentioned that the owners are not aware of the eye problems of their horses. R. Müller described that she does not see a demand since human products can also be used with horses, but N. Jürgens described that there are limitations with pharmaceuticals due to the German regulations. These indications may lead to the conclusion that there has been little education on this subject so far.

4.2 Distribution channels

Literature indicates that a multi-channel approach is common and that the main distribution channels are *eBay*, *Amazon*, *Kraemer*, *Loesdau* and online pharmacies. However, the investigation shows that the main distribution channels are *fütternundfit* and *Amazon*. Surprisingly, *Loesdau* does not sell eye care products and *Kraemer* has only one of the researched products on its website. This can be interpreted in two directions. Either *Loesdau* has missed this opportunity because their focus is not on eye care products or they do not expect that there is a market for eye care products. From *Kraemer's* reaction to the interview request it may be concluded that they don't see a market here. Due to time limitations this research focussed on online distribution channels, but in regard to marketing social media platforms like Facebook and Instagram also play a major role, as mentioned by R. Müller. Additionally, the online channels face competition with the offline channels and channels for human eye care products, such as pharmacies and retail stores.

4.3 Product types and packaging

Eye drops were described as the most common product in this research, but as there are almost no products exclusively for horses the investigated products target except horses also smaller animals (see chapter 2). N. Jürgens explains, that owners of small animals prefer drops rather than ointments and this might have influenced the results. Furthermore, the results may be related to the customers' requirements regarding packaging (see chapter 1.5). There, usability and products that benefit owners and pets alike played an important role, and eye spray and wipes can be interpreted as a reaction to this. Likewise, four of the interviewees named wipes as an eye care product and two of them described application problems among horse owners. Rabea Müller mentions that "... the horse's eyes must be cleaned externally before the drops are applied.", but it is questionable whether all horse owners handle this accordingly (see Annexe G). One company that saw the possibility of an application problem is VTG Tiergesundheit with its ultrasonic nebuliser. This nebuliser, at a cost of € 49.90, is called "free of dispute" (*Streitfrei® Augenpflege*), which draws attention to the problems of using eye care

products on horses. On its website, the company shows positive feedback from customers (VTG Tiergesundheits AG, n.d.).

4.4 Active substances and claims

As mentioned in the literature review, shrinking ingredient lists and natural ingredients mark a trend. An examination of the most common active substances in this research reveals that companies use ingredients that are well known and easy to understand for the customer. This supports the finding from Flores (2017), that customers prefer more natural ingredients as they are easier to understand. (see chapter 1.6).

The active substances are strongly related to the claims. According to Münch (2015), claims that were most important to customers are the effectiveness and quality. However, since the questionnaire was designed for horse equipment and care products, it might be questioned whether these results are applicable for eye care products. This market research has shown that the claims were different than expected from literature. The feature cleansing and moisturising is the most frequently mentioned claim, whereas hyaluronic acid, which is known to have these effects is the most frequently used substance in equine eye care products. Similarly, the other claims can be attributed to the active ingredients. Since 30% of the products claim to support diseases like a corneal or conjunctival infection, anti-inflammatory and wound healing substances enjoy great popularity. These functions were found in almost all substances. Solely vitamin A is not associated with these properties, but it is generally considered to have a positive effect on the vision.

Nevertheless, it cannot be concluded that this is also the most important criteria for customers. Moreover, literature and the expert interviews have shown that customers appreciate the user-friendliness of the packaging, which is not common in the conducted market research. According to literature, the efficacy is considered to be important for the customers. This was also described by R. Müller: “...the success of the treatment tends to be the most important thing to achieve.” (see Annexe G). Despite this finding, customers and the interviewees do not ask for the scientific proof of the

efficacy, as only one of the investigated products supports their claims by a scientific study. These results could indicate that there is a gap between what customers consider important in interviews and what influences their purchase decision. Scientific proof of the efficacy of certain substances can easily be provided in a comprehensible form, such as information texts on websites, blog articles or by certificates. Another option to display efficacy would be to use customer reviews.

4.5 Price

Within this research, there was found an average price of € 10.23 per 10 ml or g and € 16.62 per PU. The pricing range per PU indicated little consistency across similar products. It could, therefore, be concluded that the specific price has little impact on the demand. This statement is consistent with the finding from the literature that the target group has a high household income (Münch, et al., 2017), and most probably a high willingness to pay. The small sample size could also indicate that the market is not saturated and that the price range could be even broader. For companies, this can provide a first insight to get an impression of the competitors' positioning, although there is no background for solid data on pricing since the equine eye industry is a niche market.

The definition of the average price of eye care products allows the calculation of the marketpotential. The following analysis is based on the chain ratio method as described by Waheeduzzaman (2008) and Stammeier (2018). Therefore, the target group was defined in chapter 1.2 in between 53.978 up to 247.401 potential customers for the equine eye care market in Germany. These are multiplied with the purchase quantity and the product price. For this calculation, it is estimated that customers purchase eye care products 2 times per year, but this needs to be reviewed depending on the type of product sold. As this research showed, the average price per PU is € 16.62. Consequently, the market potential in a negative scenario would be € 1,794,228.72 and in a positive scenario € 8,223,609.24 per year.

As this research only analysed the prices of the existing products and not the position of the target group, there are still open questions. Magerhans (2016) defined four valuable questions for potential investors and entrepreneurs:

- What is the maximum price of the new product?
- What is the minimum price of the new product, without influencing the quality perception negatively?
- How does the demand change if the price is increased by 5%?
- How do competitors react to price decisions?

Experience shows that more than one procedure should be applied when determining prices (Magerhans, 2016). These will be elaborated in further detail in chapter 5.

4.6 Limitations

This market analysis encounters several limitations. The selection of the product sample is decisive for the reliability of the product sample. Various distribution channels were used to select 30 relevant products, but all of them were found via Google, which creates a high level of dependency. It is assumed that the results are not completely reliable because the Google algorithm is constantly changing. This assumption is reinforced by the fact that, the product *an-HyPro* mentioned by N. Jürgens was not identified in the market research. Therefore, the representativeness of the sample and its generalizability is limited. Another limitation of the reliability is that the respondents of the first expert interviews may withhold information for competitive reasons. Additionally, it may have influenced the results that the analysed products rely on the united group of small animals and horses, although they have different requirements, as mentioned in chapter 3.3.

One further limitation is that this research can only consider products that are currently available on the market. The research tries to minimize this limitation by also examining trends and, thus, future developments. Due to the scope of the research, insight into the customers' point of view is limited, although the respondents of the second interview cycle were able to give first insights, as they were in direct contact with customers. In the introduction, there are some results from other questionnaires,

but none of these specifically address eye care products. Literature concentrates more on what is desired from the customers' point of view, but these questionnaires face limitations. After all, a focus on customers' desires is not necessarily a focus on entirely rational motives and decisions.

Another limitation is that this research does not allow conclusions on the question of why eye care products have not received more attention so far. For example, the fact that *Loesdau* has no eye care products in its portfolio, may indicate two contradictory possibilities. On the one hand, they may have missed the opportunity offered by equine eye care products; on the other hand, they may have observed that there is no customer interest in these products. An interview with *Kraemer* or *Loesdau* would have brought clarity here, but both retail stores refused the cooperation.

5. Conclusion and recommendations

The purpose of this research was to analyse the equine eye care industry in Germany providing data and insights to potential investors and entrepreneurs. Therefore, in terms of an explorative analysis, three experts were interviewed at an international trade fair and four experts were interviewed by phone. Furthermore, a market analysis of 30 eye care products for horses that are available online was conducted. This analysis aimed to define the general trends, distribution channels, product types, packaging, active substances, claims and prices of these products. Potential investors and entrepreneurs can use this analysis to make informed decisions among their product development.

First, this research shows that usability and sustainability are rising trends and play a major role in customers' purchase decisions. Expert interviews point out that companies are unaware of the market for equine eye care products. Only one of the experts has experienced a demand by customers, as she is working in the customer service. Two of the expert's resort to human eye care instead of using specialized products for the horse. The respondents explain the low demand with a lack of knowledge among the owners. According to two of the experts, most owners do not notice if their horse needs eye care, although the necessity increases due to hotter summers and more flies.

Second, the investigation of the distribution channels confirms that a multi-channel approach is common. The main distribution channels are the webshop's *fütternundfit* (www.fuetternundfit.de) and *Amazon* (www.amazon.de), although the shops *Loesdau* (www.loesdau.de) and *Kraemer* (www.kraemer.de) might be considered as an unused opportunity for potential investors and entrepreneurs.

Third, the range of available product types and packages is assessed. Most of the products are available in the form of drops with a filling volume of 10 ml and are packed in squeeze bottles. Alternatively, more innovative application forms such as sprays or eye wipes could be considered as an option for potential investors and entrepreneurs, since they are in-line with the trend towards increased user-

friendliness. The respondents did not see a high market potential, but it is assumed that this may change with new application and packaging options.

Fourth, the active substances and claims of the products are analysed. Commonly used active substances in equine eye care products are hyaluron, *Euphrasia officinalis*, colloidal silver, vitamin A, chamomile and dexpanthenol. Furthermore, it was displayed that the product claims are related to the products' active substances. Hyaluron, for example, is associated with the most commonly named claims cleaning and moisturizing. With regard to the trend towards sustainability, claims such as natural, vegan and recycling are expected to become more and more prevalent in the future and should be considered by potential investors and entrepreneurs. However, literature and one of the experts emphasize that efficacy is the most important claim for them, although they do not require scientific proof.

Last, the average price of the included products is defined. It was € 10.23 per 10 ml or 10 g, ranging from € 1.20 to € 28.81, and an average of € 16.62 per packaging unit (range: € 2.99 to € 51.85). The wide price ranges imply very little consistency across similar products and limited impact on demand, which might indicate an immature market with room for mid-range price anchoring. For investors and entrepreneurs introducing new products to the market, the given prices can provide a first orientation, but other pricing strategies should be taken into consideration as well.

The main question of this thesis was "How is the online market for equine eye care products structured in Germany?". This research shows that the market for equine eye care products is niche market but could be interesting for investors and entrepreneurs as there is a high need for specific care products among equestrians. Currently, horse owners lack education, but by raising awareness of eye care, there are approximately 53,978 to 247,401 potential customers and an estimated market potential between € 1,794,228.72 in a negative scenario and € 8,223,609.24 in a positive scenario.

These results provide the basis to formulate a strategy for a new product, but as the research subject is still rather unexplored it is intended as a preparation for in-depth market research. In order to

prepare further steps towards product development, it is essential to consider the limitations of this research.

For product innovations actual information is essential, therefore it is recommended to use the provided information during the next year. The research shows that there is a high market potential if there is more education about eye care in the equine industry. Therefore, the first goal should be to raise awareness for equine eye care. This can be done through various marketing channels such as social media, newspapers and blogs. Furthermore, it is advisable to use already established online shops with an existing customer base and cross-selling with other equine care products. These could be general care products as skin or hoof care or fly masks, as they are the most commonly used product to protect the horses' eyes. Additional points of contact could be stables, competitions and the veterinarian.

If used later, it should be checked whether information, e.g. on price and current trends, is still accurate or whether it needs to be revised. When developing a new product for this industry, the next step would be to conduct a marketing analysis, with a focus on the detailed exploration of the specific target group. This could be done through quantitative questionnaires, although it might be difficult to localize the target group. In this case, it is recommended to use the analysed online and offline distribution channels (social media, veterinarian's, webshop's). These quantitative questionnaires require an investment as they are linked to advertising and motivators to reach a sufficient number of participants, but they can provide valuable insights.

Additionally, as mentioned in the discussion, different methodologies should be used when making pricing decisions. Magerhans (2016) described various methods, such as expert interviews, customer surveys, conjoint measurements, purchase offers and price tests. A valuable addition to this research would be the conjoint measurement, where customers are asked to rate the individual characteristics of a product regarding its usefulness and price. This method is considered as particularly valuable for the pricing of innovations. Together with the examination of the costs, these methods can support the company in its pricing decisions.

This research was written to attract the interest of potential investors and entrepreneurs to the equine eye care industry. In the long term, it is hoped that there will be more equine eye products to meet the growing needs of horse owners for user-friendly alternatives.

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Appendices

Annexe A: Results from the Horse Future Panel	50
Annexe B: Expert Interviews	52
Annexe C: Tables for primary research	53
Annexe D: Analysed products	54
Annexe E: Interviewees from the phone interviews in detail	55
Annexe F: Results from the expert interviews at the spoga horse in spring 2020	56
F1. Leovet Dr. Jacoby GmbH & Co. KG	56
F2. Bense & Eicke GmbH & Co. KG	56
F3. MM Cosmetic GmbH	56
Annexe G: Interview transcripts from the expert interviews in August 2020.....	57
G1. Rabea Müller – Project Blind	57
G2. Ellen Dorst from the IG Blinde Pferde e.V.	64
G3. Luca Herrmann-Deckert from Epplejeck Branches B.V.....	69
G4. Nicolin Jürgens from Augenvet.de	72
Annexe H: Contacted persons and companies that declined an interview	78

Annexe A: Results from the Horse Future Panel

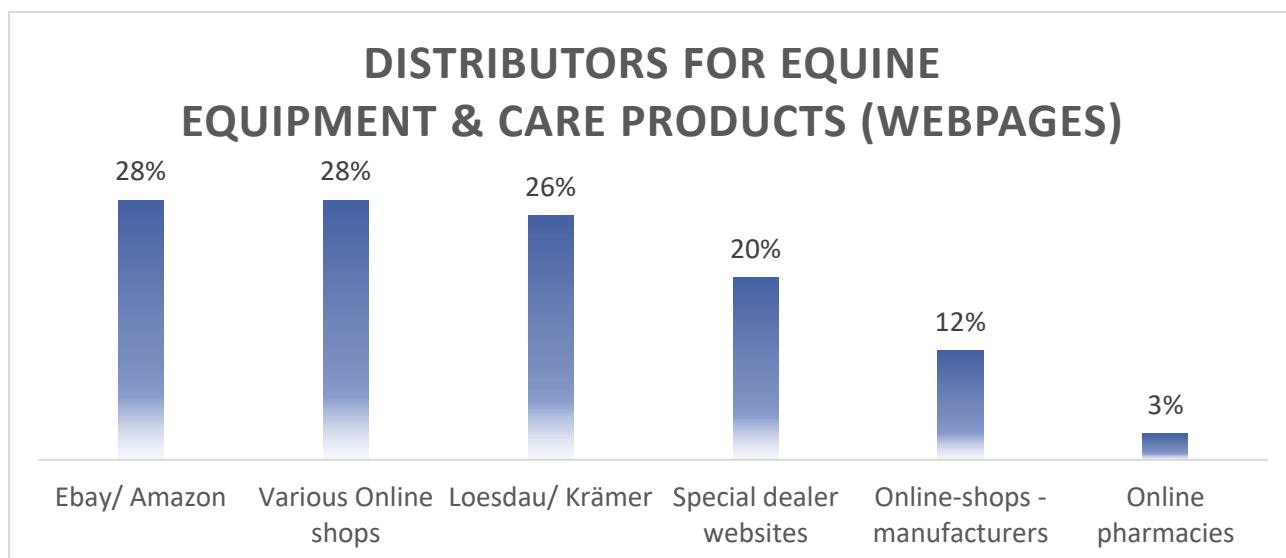


Figure A1: Distributors for equine equipment & care products by the Horse Future Panel (Münch, Pflegemittelreport, 2015).

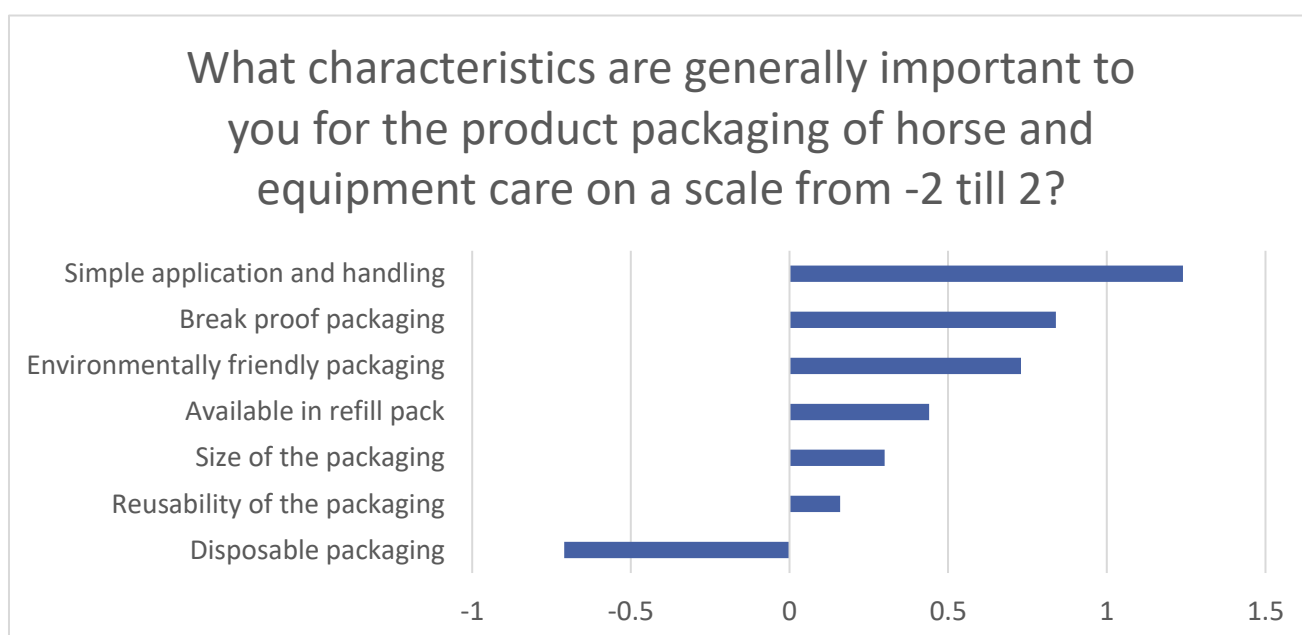


Figure A2: Rating of characteristics of product packaging by consumers from the Horse Future Panel (Münch, Pflegemittelreport, 2015).

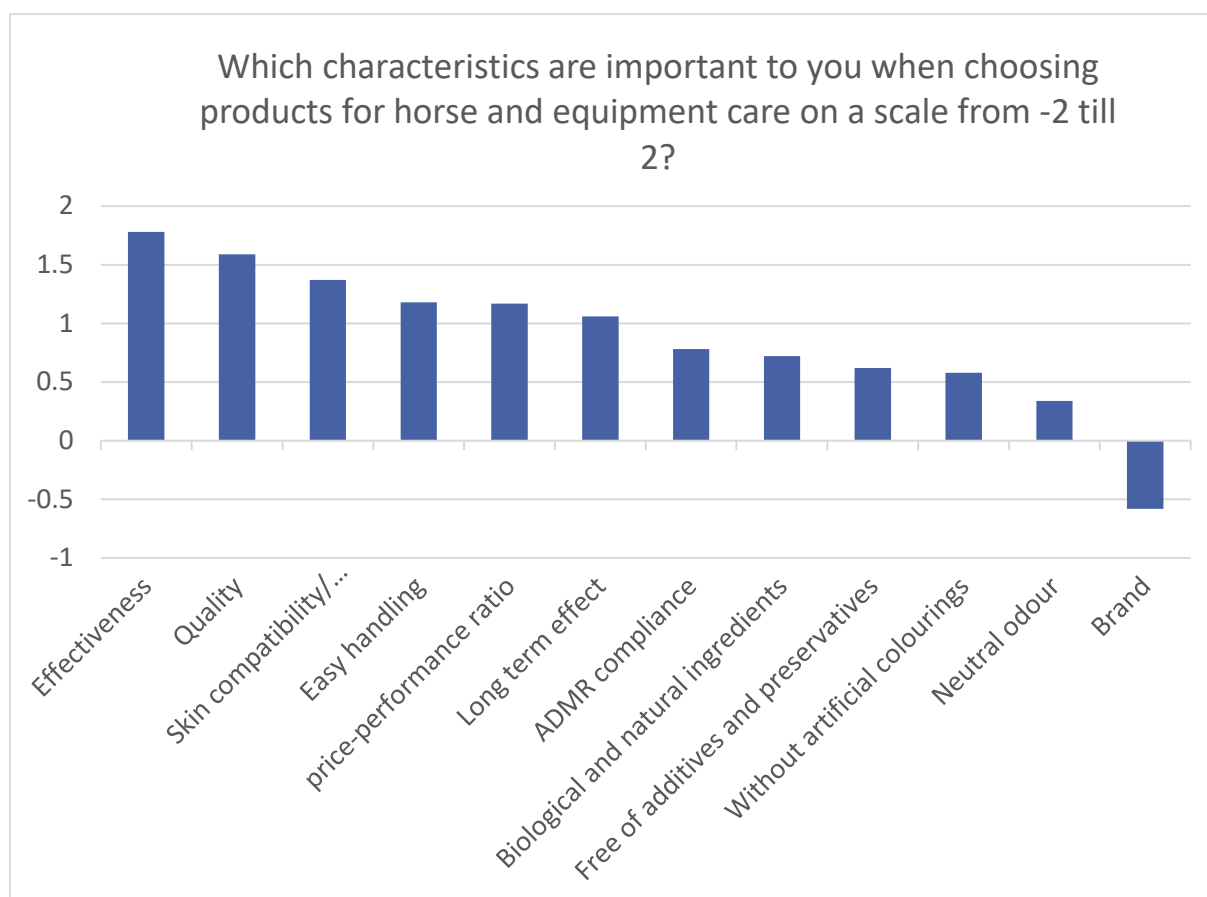


Figure A3: Rating of product claims by the Horse Future Panel (Münch, Pflegemittelreport, 2015).

Annexe B: Expert Interviews

Preparation for the primary expert interviews at the spoga horse fair:

1. Explain my interest in the Equine eye care industry and talk about what the company does.
2. Can you define some trends in the Equine (Care) Industry?
3. In how far does globalization play a role at your company?

Preparation for the secondary expert interviews by phone in general:

1. Explain my interest in the Equine eye care industry, talk about what the company/ person does and ask for the recording permission.
2. Can you define some trends in the Equine (Care) Industry?
3. In how far do you see a need for equine eye care products?

Additional questions for the Vet:

- Why did you specialize in ophthalmology?
- How often do you treat eye problems in horses?
- What are your experiences with eye care products?
- How often do you treat eye care problems?
- Which eye care products are you currently recommending?

Additional questions for the person that engages in public for horses with eye problems:

- What are your experiences with eye care products?
- What are channels that you like to buy eye care products from?
- Which eye care products are you currently using?
- What is most important for you when choosing an eye care product?

Additional questions for the employee in an equestrian retail store:

- Is there a reason, why there are none/ is only one eye care product(s) in your portfolio?

Annexe C: Tables for primary research

Table to collect the product features regarding their distribution channels, product type, packaging, active substance, claims and price.

Table C1: Overview of the product features

Product Name	Producer	Source (Channel)	Product Type	Packaging	Active Ingredient	Claim	Price
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Table C2: Overview of the product feature "Channel"

Channel					
eBay	Amazon	Kraemer	Loesdau	Distributors' Webshop	Different

Table C3: Overview of the product feature "Product type"

Product type			
Drops	Gel	Ointment	Different

Table C4: Overview of the product feature "Packaging"

Packaging							
Packaging Unit				Package			
Unit (ml or g)	5	10	Different	Squeeze bottle	Tube	Single Dose Ampoules	Different

Table C5: Overview of the product feature "Claims"

	Claims				
Effectiveness	Quality	Usability	Biological and natural Ingredients	ADMR compliance	Different

Table C6: Overview of the product feature "Price"

Price	
Price per Packaging Unit	Price per 10 ml or 10 g

Annexe D: Analysed products

Table D1: List of the products analysed.

Manufacturer	Name
Alfavet Tierarzneimittel GmbH	Alfavet Augentropfen
Breitbild.tv Produktionsgesellschaft GmbH	Animaldrops
Görge Naturprodukte GmbH	AntiForte Sanfte Augenpflege
Showmaster (A brand from <i>Kraemer</i>)	Augenreinigungstücher
Augenpräparate	Cepemycin
Medistar	Clerapliq
Katharos	Kolloidales Silber
Diafarm	Diafarm Augenreiniger Pferd - Haustier
TierraMed GmbH	Diferion Augentropfen
ESP Equi Special	ESP Nano S Augentropfen
Vetoquinol	Eye Care Augenreiniger
Keweloh	Keweloh Animal-Health Augengel
Kon - Pharma GmbH	Natua Augengel
Biologische Heilmittel Heel GmbH	Oculoheel AT ad us. Vet.
Serumwerk Bernburg AG	OcuProtect Augentropfen
Ecuphar	OmniPet Augentropfen
almapharm	OphtalVet Augentropfen
Dentavis Medizintechnik	Optixcare Eye Health
Dentavis Medizintechnik	Optixcare Eye Lube
UrsaPharm Arzneimittel GmbH	Posiformin
Rebopharm	ReboCare Ocuvid Augentropfen
Bayer Vital GmbH	Remend Cornea Augenpflege-Gel
Bayer Vital GmbH	Remend Lubrigel pflegender Tränenfilm
Sectolin	Sectolin Bright Eye
Dr. Hesse Tierpharma	Speed Augenfluid
VTG Tiergesundheit AG	Streitfrei Augenpflege
TVM UK	TVM Viskyal
cdVert Naturprodukte GmbH	Veavet Augenpflege
Augenpräparate	Vetoscon
cp-pharma	Vitamycin Augensalbe

Annexe E: Interviewees from the phone interviews in detail

Company/ Organisation	Name	Function	Date of the interview
Instagram Channel “Project Blind”	Rabea Müller	<ul style="list-style-type: none"> - Studied pharmacy - Author of the book “Blinde Pferde – ein Leben mit anderen Sinnen” (Blind horses – a life with other senses) - Influencer “project blind” 	04.08.2020
IG Blinde Pferde E.V	Ellen Dorst	<ul style="list-style-type: none"> - Author of the book “Das blinde Pferd, Haltung, Pflege und Arbeit” (The blind horse, management, care and training) - Has a website about blind horses http://ellen-problindhorse.de - Member of the non-profit association IG Blinde Pferde E.V. - Gives clinics about blind horses 	04.08.2020
Epplejeck B.V.	Luca Herrmann-Deckert	<ul style="list-style-type: none"> - Works in Marketing and Customer Service since 2017 - Studied Equine Business Management 	05.08.2020
www.augenvet.de	Nicolin Jürgens	<ul style="list-style-type: none"> - Works as self-employed general practitioner for small animals and horses with a specialisation on ophthalmology - Member of the IEOC 	06.08.2020

Annexe F: Results from the expert interviews at the spoga horse in spring 2020

F1. Leovet Dr. Jacoby GmbH & Co. KG

- Globally represented, DACH, GR, SP, FR, Russia, Japan, Mongolia (buy only muscle building products), Dubai, etc.
- Dubai assessment: The market for horse care products is still small, but it will grow.
- They also produce products of other brands (e.g. *Goldhorse*), but their products are produced by themselves.
- Trend: Sustainability, now they make all their products recyclable and create a circular system.
- All products are mineral oil free and with vegetable ingredients.
- With natural products, you are more likely to have problems with allergies.
- Bring out product with a focus on usability – a refined spray head so that horses show less anxiety.
- Are also represented in the human sector: *Dr. Jacobis* (at *DM* and *Rossmann*) and *Apotheker's Original Horse-Medicine Ointment*, mainly with horse ointment, but also with magnesium foam against cramps.

F2. Bense & Eicke GmbH & Co. KG

- Trends: Sustainability and Globalisation.
- Also represented abroad, e.g. UAE and Switzerland.
- Marketing: They work a lot with influencers, but only in Germany.
- They also sell white-label products.
- Eye care products are medical products for them and not care products.

F3. MM Cosmetic GmbH

- Trend: Natural composition and Globalisation.
- In order to prove their quality, they use labels from their human products, as e.g. the Natural Cosmetics label. There are no labels for the equine sector.
- They see the UAE as an interesting and upcoming market.
- They expect that the market for eye care products is too small and all products would be medical devices.
- Their products all come from their own production.

Annexe G: Interview transcripts from the expert interviews in August 2020

G1. Rabea Müller – Project Blind

Person	Original (German)	Translated (English)
Lea Hüser	Kannst Du mir ein paar Trends in der Pferdepflegeindustrie nennen? Oder was ist dir häufiger untergekommen?	Can you describe a few trends in the equine care industry? Or what have you noticed more often?
Rabea Müller	<p>Also es ist natürlich bei Trends immer relativ schwer in der Pferdeszene, also dadurch das ich in der Apotheke auch recht viel dazu beraten kann, was sich in der Regel immer rumspricht, weil man ja auch zu Tieren sehr gut Beratung anbieten kann, ist es ja auch meistens so, dass es direkt für Tiere relativ wenige Produkte hat. Also da gibt es so zwei verschiedene, die aber natürlich durch einen sehr sehr hohen Preis bestechen, wo die meisten Leute da schon sehr viel Abstand nehmen. Was gerade in der Pflege von den Augen natürlich immer ein Renner ist sind diese Blephaclean®-Kompressen, die sind quasi komplett steril, aber sind sehr gut zur Reinigung des äußeren Auges. Die machen sich immer gut wenn Pferde z.B. allergische Beschwerden haben oder ein trockenes Auge, dadurch fängt das Auge ja vermehrt an zu tränen. Da ist es immer sehr praktisch. Was ansonsten immer sehr gut wirkt sind die Euphrasia Augentropfen, einfach weil Sie sowohl bei Tieren als auch bei Menschen angewendet werden können. Die gibt es ja auch in den praktischen Einzeldosen. Das ist für viele so der Anreiz, dass man sich die kauft und dass man die anbricht, aber nicht nach einem Vierteljahr wegschmeißen muss, sondern die verbliebenen, die man noch nicht angebrochen hat weiterhin nutzen kann. Das ist immer ganz praktisch, weil Euphrasia durch den Augentrost (das sind</p>	<p>Trends in the horse scene are quite difficult. But people usually get to know that I can give good advice in the pharmacy, especially on animals. It is usually the case that there are relatively few products directly for animals. I know two products, but most people are already deterred by the price. Especially in eye care, these Blephaclean® compresses are very popular. They are completely sterile and are very good for cleaning the external eye. These are useful when horses have allergic symptoms or dry eyes, for example, because they moisten the eyes. This is always very practical. Apart from that, Euphrasia eye drops always work very well, simply because they can be used on both animals and humans. They are also available in the practical single dose units. This is an incentive for many to buy them, because you can use them and don't have to throw them away after a quarter of a year, instead you can continue to use the remaining ones you haven't opened yet. This is very practical because Euphrasia (eyebright) also has an effect on allergies and inflammations. There is also dexpanthenol, the typical, classic moisturizing eye drops. And then there are also many products with hyaluronic acid. For humans there are whole ranges. Meanwhile they [classic eye drops] are also recommended by veterinarians because they are adapted to the PH value of the eye and isotony</p>

	<p>die Inhaltsstoffe) ja auch zusätzlich bei Allergien und Entzündungen nochmal ne weitere Wirkung hat. Und daneben natürlich so etwas wie Dexpanthenol, also so die typischen, klassischen, befeuchtenden Augentropfen. Da gibt es dann noch ganz viele klassische Produkte mit Hyaluronsäure. Da gibt es ganze Reihen, halt für Menschen dafür. Aber es wird ja meistens von Tierärzten mittlerweile empfohlen, weil da einfach die Anpassung an den PH-Wert des Auges, die Isotonie und die Sterilität gegeben sind. Deswegen sind die ja auch recht gängig. Das sind glaube ich so die häufigsten. Was aber in der Pferdeszene jetzt nach und nach immer mehr Beliebtheit gewinnt ist das kolloidale Silber. Das wird halt relativ häufig gekauft. In dieser Urkonzentration, die man dann noch weiter verdünnen muss. Das macht man dann auch einfach mit dem sterilen Wasser, vermischt das dann und kann das dann auch zur Pflege und einfach zur Vorbeugung bei Viren und Bakterien auch gut ins Auge reintropfen. Das ist also auch relativ gängig geworden. Aber ich denke so Euphrasia, Bepanthen und das kolloidale Silber sind schon die Sachen die Sachen, die mit am häufigsten vertreten sind.</p>	<p>and sterility are given. That is why they are quite common - I think, they are the most common ones. What is gaining more and more popularity in the horse scene is colloidal silver. This is bought quite often in this original concentration, which must then be further diluted. This is simply mixed with sterile water and can then be dripped into the eye for care or simply to prevent viruses and bacteria. So, this has also become quite common. But I think Euphrasia, Bepanthen and the colloidal silver are the things that are most common.</p>
Lea Hüser	<p>Gibt es denn noch andere Trends generell in der Pferdepflegeindustrie? Zum Beispiel entsteht bei Augentropfen in Einzeldosen ja sehr viel Verpackung... oder spielt das bei Augenprodukten keine Rolle?</p>	<p>Are there any other trends in the horse care industry in general? For example, eye drops in single doses generate a lot of waste ... or does that not play a role in eye products?</p>
Rabea Müller	<p>Nein, eigentlich nicht. Also bei Augen ist halt natürlich... Also die meisten Besitzer kriegen ja nicht mal mit, wenn das Pferd trockene Augen hat. Und wenn es um Augenpflege geht ist es ja meistens, dass das Pferd ja ohnehin irgendeine Vorbelastung, wie z.B. eine Allergie eine</p>	<p>No, not really. Most owners don't even notice when the horse has dry eyes. When it comes to eye care, it is usually the case that the horse has some sort of medical condition anyway, such as allergies, periodic eye inflammations, glaucoma or whatever, and then the</p>

	<p>periodischen Augenentzündung oder ein Glaukom oder was auch immer hat und dann guckt man ja so spezifisch. Hier ist der Behandlungserfolg ja tendenziell das oberste, was man erreichen möchte. Und bei den ganzen anderen Pflegeprodukten muss ich sagen, bin ich halt ehrlich gesagt so ein bisschen raus, weil ich da finde, dass ich eher schaue das man nachhaltig irgendetwas nutzt. Und halt nach Möglichkeit nicht so oft mit irgendetwas ans Pferd herangeht. Zum Beispiel... also viele waschen ja den Schweif extrem oft oder auch das ganze Fell und da bin ich ja kein großer Freund davon, weil das einfach nachhaltig, wenn man das zu oft macht die Hautbarriere stört und den Fettfilm den die Pferde auf dem Fell haben, damit das Wasser z.B. bei Regen abfließt kann ja auch stört. Deswegen kann ich da ehrlich gesagt gar nicht so viel zu sagen. Ich bin sonst ein Fan von Effol Produkten, aber da bin ich jetzt nicht ganz so weit ausgelegt. Ich investiere hier ehrlich gesagt auch sehr wenig Geld rein.</p>	<p>success of the treatment tends to be the most important thing to achieve. With all the other care products, I must honestly say, I am out, because I ensure that I use them sustainably and if possible I don't approach the horse too often with anything. For example: Many people wash their tail extremely often or even the whole coat and I am not a big friend of that. If used too often, it will permanently disturb the skin barrier and the fat film the horses have on their coat, so that e.g. the water can run off when it rains. Which is why, frankly, there's not much I can say. I'm usually a fan of Effol products, but I'm not quite so far-reaching in that respect now. To be honest, I invest very little money in them.</p>
Lea Hüser	<p>Denkst Du denn es gibt einen erhöhten Bedarf an Augenpflegeprodukten? Du hast ja vorhin z.B. auch erwähnt, dass die meisten Leute das gar nicht so wahrnehmen, wenn das Pferd trockene Augen hat.</p>	<p>Do you think there is an increased demand for eye care products? You mentioned earlier that most people don't even notice when the horse has dry eyes.</p>
Rabea Müller	<p>Ja genau, also ich glaube, dass der Bedarf hier gar nicht so groß ist. Das ist einfach der Vorteil bei Tieren und Menschen, dass die Möglichkeiten die man hat eigentlich durch die ganzen Arzneimittel für Menschen schon gegeben sind. Also gerade auch bei Tieren. Man wendet ja genau die Tropfen und Betablocker, die z.B. den Augendruck senken oder Antibiotika und sowas wendet man ja bei Pferden genauso an wie beim Menschen. Und der PH-Wert ist ja eigentlich gleich, da kann man ja die gleichen Arzneimittel</p>	<p>Yeah, well, I don't think there's a high demand for equine eye care products. Exactly this is the advantage with animals, through all the medicines for humans all possibilities are already given. With horses we use the same antibiotics or drops and beta blockers that for example reduce eye pressure as with humans. And the PH-value is the same, therefore you can use the same medicines and certainly also the same eye drops. I think that most people take these normal homeopathic things like</p>

	<p>dort auch anwenden und sicher auch die normalen Augentropfen. Da nehme ich glaube ich die meisten Menschen, auch einfach aus Gewohnheit, weil Sie das selber bei sich kennen, diese normalen homöopathischen Sachen wie Euphrasia oder Bepanthen Augentropfen einfach weil es für Sie selber natürlich bekannt ist. Deshalb muss ich ehrlich sagen, dass ich da gar nicht so den hohen Bedarf sehe. Das einzige was mir dann die ganze Zeit so aufgefallen ist was fehlt, ist tatsächlich so eine Möglichkeit um das Auge so äußerlich zu waschen und einfach eine gute Augenspülung zu machen. Weil die meisten machen das auch weiterhin mit Bepanthen oder anderen Augentropfen, aber dass man so sterile Kompressen wie Bethaclean® nur halt für Pferde hat, da gibt es tatsächlich nichts so viele Produkte. Also bei Kraemer weiß ich die haben so eine Eigenmarke mit den Augentüchern, aber ansonsten ist es da relativ schwierig. Also gerade bei einer periodischen Augenentzündung oder wenn Sie mal tränende Augen haben. Da muss man doch, gerade bei Pferden, weil die halt einfach draußen leben sind die Augen definitiv nicht steril. Da muss man öfter, bevor man die Tropfen rein macht das Auge äußerlich sauber halten. Ich denke mal die meisten machen das mit normalen sterilen Kompressen und geben dort dann die Lösung mit drauf. Aber ich finde da wäre es tatsächlich nicht verkehrt, wenn man da tatsächlich noch Mal etwas Spezifisches für Pferde hätte.</p>	<p>Euphrasia or Bepanthen eye drops, simply because they are familiar with them. Therefore, I need to be honest and say that I do not see such a high demand. The only thing I noticed which is missing, is a possibility to wash the eye externally. Because most people do this with Bepanthen or other eye drops, but sterile compresses like Bethaclean® for horses are actually not very common. I know that Kraemer has their own brand of eye wipes, but apart from that it is quite difficult to find them. Especially in case of a periodic eye inflammation or watery eyes, the horse's eyes must be cleaned externally before the drops are applied. Since horses live outside, their eyes are definitely not sterile. I think most people do this with normal sterile compresses and then apply the solution to it but I think it wouldn't be wrong to have something specific for horses.</p>
Lea Hüser	<p>Und Deiner Meinung nach wissen auch die meisten wirklich, dass man die Produkte für den Menschen auch einfach für ihr Tier benutzen können?</p>	<p>And in your opinion, most of them know that the products for humans can also be used for their animals?</p>
Rabea Müller	<p>Genau, gerade die sozialen Medien sind glaube ich mittlerweile der erste Ansprechpartner, danach kommen</p>	<p>Right. I think the social media are now the first point of contact, followed by veterinarians and then the pharmacies.</p>

	<p>glaube ich relativ schnell Tierärzte und dann die Apotheken. Sowohl Tierärzte als auch die meisten Apotheker raten auch dazu, dass man die Tropfen nimmt, einfach weil die mit sehr hohen Standards hergestellt wurden und die Erfahrungswerte sehr sehr weit zurück reichen. Und über die sozialen Medien wird dass dann auch kommuniziert, also wenn man da zu Pferdekrankheiten und so etwas nachfragt, dann wird das in der Regel auch sofort empfohlen, weil jeder weiß wo er das herbekommt und das ist nicht nur eine Firma, dass heißt man kann in die Apotheke vor Ort gehen und hat das dann sofort. Das heißt man hat dann auch keine Lieferzeiten und es ist ja meistens, wenn es sich um Augenpflege dreht, ja das was man am ehesten braucht es halt möglichst schnell zu bekommen ist. Weil man möchte da ja verständlicherweise nicht 2-3 Tage warten, bis irgendetwas ankommt. Deswegen ist es schon den meisten Leuten gut geläufig, dass man die [menschlichen] Produkte alle nutzen kann.</p>	<p>Both veterinarians and most pharmacists recommend the use of human eye drops, simply because they have been manufactured to very high standards and experience goes back a long way. This is also communicated via the social media. For example, if you ask questions about horse diseases, usually the humane products are recommended. Everybody knows where to get them and this is not only a company, that means you can go to the local pharmacy and get them immediately, because there are no delivery times. Especially when it comes to eye care it is important to get the products as fast as possible, you don't want to wait 2-3 days for anything to arrive. That's why most people are already familiar with the fact that [human] products can all be used for animals.</p>
Lea Hüser	<p>Hast Du denn irgendwelche negativen Erfahrungen mit Augenprodukten gemacht, oder Probleme mit der Applikation gehabt, oder mit irgendwelchen Wirkstoffen?</p>	<p>Have you had any negative experiences with eye products, their application or their active ingredients?</p>
Rabea Müller	<p>Also mit Wirkstoffen und so weiter bisher nicht. Also das einzig negative ist halt, wenn man so lange Kortison am Auge anwendet, gerade jetzt bei der periodischen Augenentzündung wird das ja auch von den Ärzten verschrieben. Dann hat man ja auch das Problem, dass einige Pferde bei einer sehr langen Applikation über mehrere Wochen und Monate dann sekundär ein Glaukom ausbilden. Also das ist einfach ein Wirkstoff Problem, dass gibt es ja bei Menschen ebenso, dass ist das einzige,</p>	<p>No, not with active ingredients or anything like that so far. The only negative thing I can think of are the side effects of using cortisone too long on the eye. Especially in the case of periodic eye inflammation, this is also prescribed by veterinarians. Then you have the problem that some horses develop secondary glaucoma after a very long application over several weeks and months. This is a problem with the active ingredient, which exists in humans as well. That's the only thing I could think of</p>

	<p>was mir jetzt sofort bei Wirkstoffen einfallen würde. Bei der Applikation wäre es glaube ich nicht verkehrt diese Tropfflaschen so ein bisschen daran anzupassen, dass man ein sehr großes Tier vor sich hat, was den Kopf dann hochheben kann und sich ungern die Lider auseinander ziehen lässt um dort Tropfen reinzugeben. Ich habe dann oft schon bei Tropfflaschen gedacht, es wäre praktisch wenn die oben keinen so langen Hals haben, damit man, wenn man mit der einen Hand die Lider auseinander zieht und mit der anderen Hand dann reintropft, dass man dann gar nicht mehr Gefahr läuft, dass wenn man mit der Spitze ins Auge kommt. Weil man zum einen dann das Risiko läuft, dass die Flasche dann kontaminiert wird und man sie eigentlich wegwerfen müsste und zum anderen bleibt das Verletzungsrisiko für das Pferd. Wenn das dann doch in die Richtung rückt mit dem Kopf, dass man dann doch mit der Flasche ausversehen in das Auge kommt und das möchte man ja auch verhindern. Da habe ich schon oft gedacht, da wäre es praktisch, wenn die Flaschen z.B. oben da wo man runter drückt und der Tropfen rauskommt ein bisschen gedrungener sind, damit man dort einfach auch wenn man nah ans Auge ran muss es leichter hat die Tropfen ohne Risiko [zu verabreichen].</p>	<p>right now with active substances. For the application, I think it would be good to adjust the dropper bottles to the fact that you have a very large animal in front of you, which can raise its head and does not like to have its eyelids pulled apart to put drops in them. I have often thought it would be practical if the dropper bottles did not have such a long neck at the top. To ensure that if you pull the eyelids apart with one hand and drip with the other, there is no longer any risk of getting the tip into the horse's eye. Because on the one hand you run the risk of contaminating the bottle and you would have to throw it away and on the other hand there is the risk of injury for the horse. If the horse moves its head towards the bottle you could accidentally touch the eye with the bottle and you want to prevent that. I have often thought that it would be practical if the bottles were a little bit more compact, so that you could easily get the drops into the eye even if you have to get close to it without any risk.</p>
Lea Hüser	<p>Du hast am Anfang schon ein bisschen etwas zu deinen Empfehlungen mit mir geteilt. Was für Produkte nutzt Du denn zurzeit?</p>	<p>You already shared your recommendations with me at the beginning. What kind of products are you currently using?</p>
Rabea Müller	<p>Also zurzeit, da mein eines Pferd ja keine Augen mehr hat fällt das natürlich raus.</p>	<p>Well, currently... One of my horses has no eyes anymore so this cannot be considered.</p>
Lea Hüser	<p>Aber muss man das nicht auch pflegen?</p>	<p>But don't you have to care for that too?</p>
Rabea Müller	<p>In dem Sinne schon, aber das ist sehr stark vom Pferd abhängig. Also man kann</p>	<p>From that point of view, yes, but it depends to a great extent on the horse.</p>

<p>da einfach etwas härtere Kosmetikprodukte nehmen, z.B. die mit den etwas härteren Borsten, aber am besten klappt es tatsächlich mit dem Finger. Gerade jetzt in der Fliegenzeit, wenn die ganzen kleinen Mücken darein kommen, dann juckt das natürlich ziemlich. Da hat man mit den größeren Borsten [mehr Probleme], entweder sie sind doch nicht hart genug oder man kommt doch nicht richtig rein. Deswegen bevorzuge ich da entweder ein feuchtes Tuch zu nehmen, einfach einen Lappen, oder halt das mit der Hand komplett zu machen. Da nutze ich eher das was man sowieso hat und jetzt weniger irgendwelche bestimmten Produkte. Auch bei meinem kleinen anderen Pferd braucht Sie in der Regel aktuell nichts, weil Sie weder allergische Probleme hat, noch irgendetwas anderes. Wenn jetzt wirklich mal irgendetwas ist und Sie z.B. eine leichte Rötung rund um die Augen hat, da wäre immer meine allererste Wahl die Euphrasia Augentropfen in Einzeldosen Behältnissen und danach würde dann relativ schnell die Bepanthen Augencreme kommen, einfach weil wenn man die reinmacht verteilt sich ja eine schöne Schicht über das Auge und das befeuchtet und beruhigt das einfach nochmal. Das wäre so die erste Schicht. Und wenn man dann aber merken würde da kommt eine Entzündung oder ähnliches, dann kommt sofort der Tierarzt. Aber das wären so die ersten beiden Produkte, die ich gleich anwenden würde. Also Euphrasia Tropfen oder kolloidales Silber und danach dann erstmal so etwas wie die Bepanthen Augencreme.</p>	<p>You can use slightly harder cosmetic products, e.g. the one with the slightly harder bristles, but the best way is to actually use your finger. Especially now in the fly season, when all the little mosquitoes come in, the eye socket is itching quite a bit. You have [more problems] with the bigger bristles, either they are not hard enough or you can't get them in properly. That's why I prefer to either use a moistened wipe or rag, or just do it by hand. I rather use what I have here anyway and not any specific products. Also my other little horse currently needs nothing, because she has neither allergic problems nor anything else. If there really is something going on and she has e.g. a slight redness around her eyes, my first choice would always be the Euphrasia eye drops in single doses. Afterwards I would use the Bepanthen eye cream quite quickly, because it spreads a nice layer over the eye and this moisturizes and soothes it again. That would be my first step and if I notice that an inflammation or something similar is approaching, the vet will come immediately. These would be the first two products I would use immediately. Euphrasia drops or colloidal silver and afterwards something like the Bepanthen eye cream.</p>
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G2. Ellen Dorst from the IG Blinde Pferde e.V.

Person	Original (German)	Translated (English)
Lea Hüser	Welche Erfahrung hast du bisher mit Augenpflegeprodukten gemacht?	What experience have you had so far with eye care products?
Ellen Dorst	Ich habe insoweit Erfahrung gemacht, dass ich, vor 20 Jahren gab es noch nicht so viele Pflegeprodukte, zumindest nicht für die Tiere, da musste man schon sehr suchen. Deswegen habe ich dann auf die Humanmedizin zurückgegriffen und auf Pflegeprodukte für Kleinkinder oder Babys, was ich dann fürs Auge benutzt habe. Oder einfach nur Kamille Lösung mit Wattebausch oder klares Wasser, ja was man so als alte Hausmittelchen hat.	My experience is that I had to search a lot for care products 20 years ago, as there was not so much available at least not for animals. That's why I turned to human medicine and to care products for toddlers or babies for equine eye care. Or I simply used camomile solution with cotton wool or clear water. Just the things that are known as old household remedies.
Lea Hüser	Bei Pferden werden ja generell viele Hausmittel benutzt, oder?	With horses people generally use a lot of household remedies, don't they?
Ellen Dorst	Ja, es hilft ja auch, sonst würde man die ja nicht benutzen. Es ist ja auch umgekehrt so, manche Sachen, die fürs Pferd gut sind, die benutze ich auch so für mich für ganz viele Bereiche. Warum nicht? Hat noch nicht geschadet.	Well, they do help, otherwise you wouldn't use them. It is also the other way around, I use the things that are good for my horse in many areas for me too. Why not? It hasn't caused any harm yet.
Lea Hüser	Und wo bekommst du die Pflegeprodukte dann her?	And where do you get your care products?
Ellen Dorst	Früher habe ich Sie dann im Drogeriemarkt oder so bekommen. Heute gibt es ja mehrere Produkte und für das Pferd speziell, da gucke ich hauptsächlich im Internet. Ich frage zwar auch meinen Tierarzt, aber im Internet gibt es eine sehr große Auswahl, wo man sich dann mal etwas raussuchen kann. Oder natürlich noch besser, wenn jemand kommt und man dann sagt „Hör zu, ich habe da etwas ganz tolles“, dann probiere ich das natürlich auch aus, selbstverständlich.	I used to get them at the drugstore. Today there are several products and also special products for the horse, therefore I mainly look on the internet. I also ask my veterinarian, but in the Internet there is also a very large selection. Or even better, if someone comes and says "Listen, I've got something really great", then I try it out, of course.
Lea Hüser	Ja, das ist natürlich der Idealfall.	Yes, that is of course ideal.

Ellen Dorst	Ja, so war das ja auch mit der Verena. Da habe ich gesagt, „Hör zu hier, probier aus“. Und Sie war ja begeistert. Das hat ja auch so gut bei ihr geholfen. Und ich hab's halt auch selber bei mir probiert, weil grad mit den Augen, dass ist ja schon ein ganz empfindliches Thema, bevor man da wirklich an ein Pferd geht was eh schon Probleme hat und dann hab ich's bei mir probiert und ich habe ja auch sehr empfindliche Augen. Das hat geholfen und dann kam es auch mal ans Pferd.	Yes, it was the same with Verena. Then I said, "Listen here, try it out" and she was very excited as the product really helped her. I first tested it on myself, as the eyes are a very sensitive subject. I want to be on the safe side before I let anything near a horse which already has problems. That's why I tried the product on myself first, as I also have very sensitive eyes. Since it helped very well I used it on my horse.
Lea Hüser	Welche Pflegeprodukte verwendest du zurzeit?	Which care products do you use at the moment?
Ellen Dorst	Jetzt bin ich ja auf euer bitop da gekommen, dass ist super. Ich benutze es für mich und für die Pferde. Und ich hab da nochmal... ich weiß jetzt nicht von welcher Firma... aber ab und zu habe ich nochmal Feuchttücher, wenn die so ein bisschen schmieren oder kleben oder irgendwie ist Dreck drin, da nehme ich mal ein Feuchttuch. Aber welche Firma das jetzt direkt ist, dass kann ich dir jetzt nicht sagen.	Now I've got your bitop, that's great. I use it for me and for the horses. And I have another one... I don't know from which company... but every now and then I use some wet wipes. Especially when the eyes are smudged, sticky or there is dirt in them, I use wet wipes. But I can't tell you exactly what company they're from.
Lea Hüser	Das ist nicht so schlimm, dass hilft mir auch schon weiter.	That's all right, this information still helps me a lot.
Ellen Dorst	Ja, das ist ja auch überall fast gleich. Also ich gucke schon, dass es sensitiv ist, also ohne Duftstoffe oder so Sachen, dass gehört nicht ins Auge. Also das muss schon neutral sein. Befeuchtung und solche Sachen.	Yes, it's almost the same everywhere. Well, I certainly ensure that the wipes are sensitive, thus without perfumes or things like that, that doesn't belong in the eye. I mean, they have to be neutral and moisturize and all that.
Lea Hüser	Also guckst Du dir immer die Inhaltsstoffe an?	So you always look at the ingredients?
Ellen Dorst	Jaja, ich bin dann schon so ein Typ. Früher war ich nicht so, aber mittlerweile gucke ich schon was drinne ist. Also mit den	Yeah, well, I'm that kind of guy. I wasn't like this before, but now I look at the ingredients. Just like with the sprays, in

	Sprays ist das ja genauso, also mit dem Aluminium, hat man ja früher nicht draufgeguckt. Heutzutage guckt man ja schon was so drinsteckt. Umso mehr Inhaltstoffe, Parfüme oder Zusatzstoffe umso skeptischer werde ich dann eigentlich. Da lasse ich eher die Finger von.	the past nobody cared if there was aluminum in them. Nowadays you check what is inside. The more ingredients, perfumes or additives, the more sceptical I become. I'd rather keep my hands off.
Lea Hüser	Das kann ich verstehen.	I can understand that.
Ellen Dorst	Klar, das Pferd brauch nur noch eine Allergie oder noch eine Empfindlichkeit zu haben und schon hast du den nächsten Schaden.	Sure, the horse only needs to have an allergy or sensitivity and you have the next damage.
Lea Hüser	Ja, gerade die Augen sind ja sehr empfindlich.	Yes, especially the eyes are very sensitive.
Ellen Dorst	Ja, klar, dass ist ja auch eine Eingangspforte. Was daran kommt, dass geht ja gleich weiter. Das ist ja nicht, dass es dann da am Auge bleibt. Dann hast du ja, was weiß ich, noch größere Probleme nachher. Ne, da muss man ein bisschen aufpassen.	Yeah, well, they' re an entry point. What goes in there moves right along. It doesn't stay in the eye. Then you' ll have even bigger problems later on. You have to be careful.
Lea Hüser	Hast Du noch eine Idee, was es für Trends in der Pflegeindustrie gibt? Also z.B., was du jetzt beschrieben hast, dass die Leute auf die Inhaltstoffe gucken, könnte ja auch ein Trend sein.	Do you have an idea what trends there are in the equine care industry? For example, what you just described, that people are checking the ingredients, could also be a trend.
Ellen Dorst	Ja, auf jeden Fall! Also ich glaube schon, dass die Leute immer sensibler dafür werden. Also wenn ich mich jetzt zurückerinnere, wir waren früher net so. Aber gut früher war halt auch nicht so viel Nebenzeugs drin. Da gab das Pure. Das hat sich ja jetzt erst entwickelt mit den ganzen Zusatzstoffen. Deshalb musste man da früher auch gar nicht so drauf achten. Also so ist mein Empfinden. Und heute, da muss man ja wirklich gucken. Obwohl die Industrie da ja auch schon etwas tut.	Yes, definitely! I think people are becoming more and more sensitive to this issue. When I think back, we didn't used to be like this. But there didn't used to be that much junk in there either. There were only pure care products. That has just evolved recently with all these additives. That's why in the past, in my opinion, you didn't have to pay attention to it. And today, you really have to check everything. Although the industry is already doing something about it.

Lea Hüser	Klar, weil die Nachfrage sich ja auch geändert hat.	Sure, because the demand has changed.
Ellen Dorst	Jaja, genau, weil wir halt gucken. Und auch nicht alles kaufen und ein bisschen aufpassen, das ist es ja eben. Und mehr ist auch nicht immer besser. Ich finde schon, dass das ein Trend ist. Es ist ja so wie mit den Vegetariern oder Veganern. Ich meine vor 20 Jahren, da gab es 2 Vegetarier, weil die es vielleicht gesundheitlich nicht vertragen haben. Und heutzutage gibt es das ja so dass wir bald mehr Vegetarier haben [als Fleischesser], weil auch das Bewusstsein sich ändert.	Yeah, right, because we are checking and don't buy everything and pay attention. That is just my point. More is not always better. Yeah, I think that definitely is a trend. It's just like with vegetarians or vegans. I mean, 20 years ago, there were 2 vegetarians, because they might not have tolerated it in terms of health. And nowadays we soon have more vegetarians [than meat eaters] because consciousness is changing.
Lea Hüser	Gibt es denn noch andere Trends in der Pflegebranche, die dir einfallen würden?	Are there any other trends in the care industry that you can think of?
Ellen Dorst	Ah, Trends in der Pflege. Also auf jeden Fall auf die Naturbasis zurück, alles aufs Natürliche zurück. Weniger und natürliche Inhaltsstoffe. Ich glaube das ist der Trend überhaupt. Auch diese ganze Genetik, dass wollen die Leute net. Zumindest hier in Deutschland, aber ich denke auch weltweit. Das ist ja doch sehr umfassend, dass wir wirklich auf diesen natürlichen Prozess zurückwollen.	Oh yes, trends in the care industry. Certainly, many want to return to the natural. Less ingredients and natural ingredients – I think that is the current trend. I think that's the current trend. People don't want all that genetics either. At least here in Germany, but I think also worldwide. It's very common to return to the natural process.
Lea Hüser	Gibt es denn einen Bedarf an mehr Augenprodukten oder ist der Markt eigentlich schon gesättigt?	Is there a need for more eye products or is the market already saturated?
Ellen Dorst	Da bin ich ehrlich gesagt ein bisschen überfragt. Also wenn es 2-3 gute Produkte gibt, die auch wirklich helfen, dann ist ja schon viel getan. Man muss ja nicht 50 Sachen... Gut das wird so sein, dass die verschiedenen Firmen alle das gleiche mit einem anderen Namen rausbringen, aber ich sage mal, wenn man da etwas hat, was wirklich pflegefachlich gut hilft... Alles andere ist	To be honest, I'm a little stumped. So if there are 2-3 good products that really help, then a lot is already done. You don't have to have 50 products... Well, probably the different companies will all release the same thing under a different name. But I would say that if you have something that really helps in terms of care then that is enough. Everything else is a matter for the vet. That's no longer

<p>ja dann wieder eine Sache vom Tierarzt. Das ist ja dann nicht mehr das Metier von den pflegenden Produkten. Pflegende Produkte heißt für mich einfach, dass das Auge gepflegt wird, Feuchtigkeit zugeführt wird oder halt Entzündungen so ein bisschen zurückgebaut werden. So etwas halt. Beruhigend für das Pferd, angenehm... Und wenn das berücksichtigt wird, dann habe ich eigentlich alles was ich brauche. Und wie gesagt, also wenn es irgendwie in den kranken Bereich geht, wo das Pferdeauge krank ist, da gehe ich zum Tierarzt. Aber das kann ich ja unterstützend trotzdem weiter geben. Das wäre für mich auch sehr wichtig, dass ich das [Pflegeprodukt] zu dem Arzneimittel, was ich vom Tierarzt verschrieben bekomme weiter mitnutzen kann. Das wäre auch etwas was wichtig ist für mich. Ich nutze Sie auch für den Hund, weil die kleinen Hunde haben ja auch oft so tränende Augen. Manche deklarieren ja immer „für Hund“ und „für Pferd“, ich weiß das die in der Anatomie sehr unterschiedlich sind, aber ich kann mir nicht vorstellen, dass das am Auge wirklich so ist. Deswegen benutze ich es halt dann auch gerne mal für den Hund mit. Und dann gehe ich davon aus, dass es nicht schädlich ist bei den Pflegeprodukten. Klar, bei Medikamenten ist das etwas anderes, aber bei dem Pflegeprodukten gehe ich davon aus, dass diese keine Nebenwirkungen haben.</p>	<p>the task of care products. Care products mean for me that they take care of the eye, moisturize and support in case of inflammations. Something like that_ Calming for the horse, pleasant... If that's taken into account, I have everything I need. As I said, if there is a disease I go to the vet and then I can continue to apply the care product in order to support the horse. That is also very important for me: I want to be able to use it [the care product] at the same time as the medicine prescribed by the vet. I just remembered something else that's important to me. I also use the eye care products for the dog, as small dogs often have watery eyes. Some companies always declare here "for the dog" and "for the horse". I know that they are very different in their anatomy, but I cannot imagine that there are such big differences in the eye. That is why I also like to use the products also for the dog. I assume that it is not harmful with the care products. Sure, it is different with medicines, but with the care products I assume that they do not have any side effects.</p>
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G3. Luca Herrmann-Deckert from Epplejeck Branches B.V.

Person	Original (German)	Translated (English)
Lea Hüser	Kannst Du einige Trends in der Pferdepflegeindustrie benennen?	Can you name some trends in the equine care industry?
Luca Herrmann-Deckert	In der Pferdepflegeindustrie geht der Trend vor allem dahin das Pferd mehr und mehr zu pflegen und mehr nach den verschiedensten Bedürfnissen zu gucken und auch das Pflegemittel immer spezifischer werden finde ich. So, dass Sie spezifischer anwendbar sind. Nur für Hufe und dann speziell für bestimmte Krankheiten... ja solche Sachen.	In the horse care industry there is a growing trend to care for the horse more and more and there is more awareness for the specific needs. Therefore, also the care products become more specific in my opinion. By specific I mean that they are more specified applicable, like products only for hooves and then specifically for certain diseases... yes such things.
Lea Hüser	Hast du dich schonmal mit Augenpflegeprodukten auseinandergesetzt?	Have you informed yourself about eye care products?
Luca Herrmann-Deckert	Ich muss sagen, da mein Pferd Chippy selber keine Probleme mit seinen Augen hat habe ich mich selber nicht wirklich spezifisch mit Pflege der Augen beschäftigt. Durch den Kundendienst schon mehr. Wenn Leute fragen, wenn Pferde Probleme haben mit der periodischen Augenentzündung, bzw. mit hellem Sonnenlicht oder gerade eine Augen-OP hatten und dann etwas brauchen, was die Augen schützt.	I have to say that as my horse Chippy himself has no problems with his eyes, I have not really dealt with eye care products. More through the customer service. People often ask when horses have problems with e.g. periodic eye inflammation or bright sunlight. Or if the horses recently had an eye operation and need something to protect their eyes.
Lea Hüser	Habt ihr viele solcher Kundenanfragen?	Do you have a lot of these customer requests?
Luca Herrmann-Deckert	Anfragen selber wenig, aber dadurch, dass wir den eVysor von eQuick verkaufen – ja, so heißen die glaube ich – kommen halt schon Fragen zu dem Produkt rein. Da wird das Produkt ja auch sehr gerne gekauft, weil es halt die Augen komplett vor UV-Licht schützt und auch vor Staub und vor anderen Gegenständen während des Reitens.	There are not many inquiries, but because we sell the eVysor from eQuick - yes, I think that's what they are called - there are quite a few questions about the product. People like to buy the product because it protects their eyes from UV-light, dust and other objects during riding.

Lea Hüser	Siehst du denn einen Bedarf an mehr Augenprodukten?	Do you see a need for more eye care products?
Luca Herrmann-Deckert	<p>Ich gehe schon davon aus, dass immer mehr Leute doch danach gucken werden, einfach weil es immer mehr Pferde mit Augenproblemen gibt. Ich denke, dass ein Teil die Probleme – wenn es mal ein tränendes Auge ist – ignoriert, aber wenn man selber ein Pferd hat, dann sieht man doch schon schnell, dass vor allem in der Sommerzeit, wenn die Fliegen da sind viel mehr tränende Augen und dicke Augen da sind und viele sich dann erst, wenn so etwas auftritt, informieren, was man dagegen machen kann. Dann ist da natürlich die Augenpflege da. Und wenn man dann so guckt gibt es momentan ja irgendwelche Augenpflegetücher, aber sonst gibt es ja wirklich qua Pflege im Reitsportladen würde ich sagen sehr sehr sehr sehr wenig.</p>	<p>I assume that an increasing number of people will look for it, simply because there are more and more horses with eye problems. I think that some people ignore the problems, especially if it is just a watery eye. But if you have a horse yourself, you will soon see that there are a lot more watery and swollen eyes, in particular in the summer with all the flies. Many people inform themselves only when something like this occurs. Then of course there is the eye care. And at the moment there are only eye care wipes, but otherwise I would say that there is very little available for eye care in equestrian shops.</p>
Lea Hüser	Gibt es einen Grund, warum ihr abgesehen von den Fliegenmasken nur ein Pflegeprodukt in eurem Sortiment habt?	Is there a reason why, apart from the fly masks, you only have one care product in your product range?
Luca Herrmann-Deckert	<p>Da weiß ich spezifisch nichts drüber. Das macht unser Team vom Einkauf. Wir sind natürlich mitgegangen mit dem eVysor, weil der Markt dafür da ist und wir das auch sehen. Wie gesagt wird der auch gut verkauft. Aber warum wir jetzt nicht spezifisch mehr Pflegeutensilien haben, dass könnte ich so jetzt nicht sagen. Ja, wir sind halt mehr der Reitsportladen und nicht der Pflegeladen. Da haben wir unser Tochterunternehmen der Horsefitshop, für den wäre das natürlich interessant, weil es da nur um die Pflege der Pferde geht. Also mit Supplementen und Pflege und so etwas. Und wir mehr mit Reitbekleidung und Pferdebekleidung und solchen Sachen verdienen.</p>	<p>I don't know anything about that specifically. That's done by our procurement team. Of course we went along with the eVysor because we see that the market is there for it. As I said, it sells well. But I couldn't say right now why we don't have more specific care products. Yes, we are simply more an equestrian sports shop rather than a care shop. Since we have our subsidiary company Horsefitshop, this would be very interesting for them, because they deal exclusively with horse care products. With supplements and care and all that. And we earn more with riding clothes and horse gear and things like that.</p>

Lea Hüser	Aber ihr kriegt ja trotzdem Fragen rein zur Augenpflege?	But you still get questions about eye care?
Luca Herrmann-Deckert	Ja, gut es sind nicht so viele, aber vor allem Fragen zu... also wenn man es anbietet, dann sind die Fragen da.	Yes, well there are not so many, but mainly questions about... well, when you offer the products, then the questions are there.
Lea Hüser	Darfst Du mir Zahlen nennen zu eurem Verkauf von dem eVysor?	May I ask you to give me some numbers on your sales of the eVysor?
Luca Herrmann-Deckert	Das kann ich so aus dem Stehgreif nicht sagen, aber ich denke auch nicht, dass es hier gewollt ist, dass wir Zahlen rausgeben.	I can't say this off the top of my head, but I don't think it's the intention here that we give out numbers either.

G4. Nicolin Jürgens from Augenvet.de

Person	Original (German)	Translated (English)
Lea Hüser	Wieso haben Sie sich auf die Ophthalmologie spezialisiert?	Why did you decide to specialize in ophthalmology?
Nicolin Jürgens	Darauf bin ich gegen Ende des Studiums gekommen. Da ich ursprünglich immer Pferdetiermedizin machen wollte, dann ein bisschen davon abgekommen bin, aber auch nicht nur Kleintiere machen wollte. Irgendwie kam ich dann darauf, dass generell eine Spezialisierung sinnvoll wäre und die Augen haben mich immer schon interessiert. Was ich eben besonders schön finde ist, dass man hier Tierart übergreifend arbeiten kann.	I figured this out towards the End of my studies. Originally, I wanted to become an equine veterinarian, but then I got a bit off track. But then I also didn't want to do small animals only. Somehow I came to the conclusion that a specialization would be useful and I have always been interested in the eyes. One thing that I really appreciate about this specialisation is that you can work with different animal species here.
Lea Hüser	Wie oft behandeln Sie inzwischen Augenprobleme bei Pferden?	How often do you treat eye problems in horses?
Nicolin Jürgens	Bei Pferden momentan sehr unregelmäßig. Ich arbeite sowieso ziemlich wenig, weil ich 2 kleine Kinder habe. Ich bin 2 Tage die Woche in einer Kleintierpraxis und dann ab und zu, je nach Bedarf, wenn irgendwelche Pferdebesitzer oder Pferdetierärzte anrufen, wegen irgendwelcher Augenprobleme. Dann fahre ich durch die Gegend und besuche Pferde und ab und zu auch noch andere Tierarten. Es ist wirklich sehr unterschiedlich. Mal ist es ein Pferd im Monat, mal sind es drei, mal sind es Monate auch mal kein Pferd	At the moment I treat horses very irregularly. I work very little anyway, as I have two small children. I work 2 days a week in a small animal practice and depending on the demand I drive around and visit horses and sometimes also other species. I leave whenever horse owners or veterinarians call me because of eye problems. It's really very different. Sometimes it's one horse a month, sometimes it's three, sometimes there are no horses for months.
Lea Hüser	Gibt es etwas woran Sie fest machen können wie viele Fälle auftreten? Hat das etwas mit dem Wetter zu tun oder so?	Is there anything you can use to determine how many cases occur? Does this have something to do with the weather for example?
Nicolin Jürgens	Ne, dafür mache ich einfach zu wenig Pferde und arbeite generell zu sehr in Teilzeit. Ich denke bei mir würden sich mehr melden, wenn ich mich selber bekannter machen würde. Also mehr	No, I simply do too few horses for that and generally work too much part-time. I think more people would get in touch with me if I became better known. You know, if I would advertise myself more If

	Werbung für mich machen würde. Wenn ich dann wirklich viele Pferdepatienten hätte, dann könnte ich wahrscheinlich auch irgendetwas über saisonales Auftreten sagen. Aber dadurch, dass ich so wenig Patienten habe kann ich nicht wirklich sagen, warum es mehr oder weniger sind.	I really had a lot of horse patients, then I could probably say something about a seasonal occurrence. But because I have so few patients I can't really say why there are more or less.
Lea Hüser	Das kann ich verstehen. Sind Ihnen Trends in der Pferdepflegeindustrie aufgefallen?	Yeah, I can understand that. Have you noticed any trends in the horse care industry?
Nicolin Jürgens	Worauf beziehen Sie Pferdepflegeindustrie?	To what do you refer with horse care industry?
Lea Hüser	Ich beziehe das auf Pferdepflegeprodukte, also zum Beispiel Mähnensprays, usw. Alles andere wären Medizinprodukte oder Arzneimittel. Aber Sie können mir auch gerne etwas zu Trends bei Arzneimitteln erzählen.	I refer to horse care products, for example mane sprays, etc. Everything else would be medical devices or pharmaceuticals. But you can also tell me something about trends in pharmaceuticals.
Nicolin Jürgens	Und was für Trends meinen Sie? Ob jetzt bestimmte Produkte in letzter Zeit häufiger eingesetzt werden?	And what trends do you mean? Whether certain products have been used more frequently lately?
Lea Hüser	Genau, also es könnte ein Trend sein, dass Pferdebesitzer mehr Pflegeprodukte für ihre Pferde kaufen. Oder, dass Sie sagen Sie wollen natürlichere Pflegeprodukte oder die Kunden wollen recycelbare Pflegeprodukte... Das könnten Trends sein.	Exactly, it could for example be a trend that horse owners buy more care products for their horses. Or that they say they want more natural care products or that the customers want recyclable care products... These could be trends.
Nicolin Jürgens	Ich glaube, dass ich das nicht ganz korrekt beantworten kann, weil ich überhaupt relativ wenig Pferdepatienten sehe und untersuche. Also ein Trend in dem Sinne – es ist wahrscheinlich kein richtiger Trend – aber seit kurzem gibt es einige tiermedizinische Augensalben und Augentropfen, die überhaupt für Tiere zugelassen sind. Die gibt es erst seit...ich weiß gar nicht genau... 1-2 Jahren und die	I do not think I can answer this correctly, as I see and examine fairly few horse patients. A trend in this respect - it is probably not a real trend - could be that there have recently been some veterinary eye ointments and drops that are approved for animals. They have only been around for...I don't know exactly... 1-2 years and of course they are used more and more now. The reason for this

	<p>werden jetzt natürlich immer mehr eingesetzt, weil man die natürlich dem Humanmedizinischen auch bevorzugen muss. Die sind einfach neu auf den Markt gekommen und deswegen müssen die einfach auch eingesetzt werden bevor man etwas humanmedizinisches einsetzt. Das ist natürlich jetzt schon aufgefallen, das es da jetzt so einen Wechsel gibt.</p>	<p>is that they have to be preferred over human medical products. They are new on the market and therefore they have to be used before using any medicine for humans. This change was certainly noticed.</p>
Lea Hüser	<p>Inwieweit müssen die Produkte eingesetzt werden? Wenn Sie der Meinung sind, dass ein humanmedizinisches Produkt besser funktioniert, können Sie auch trotzdem das verschreiben?</p>	<p>To what extent do you have to use the products? If you think that a product for human medicine works better, are you still allowed to prescribe it?</p>
Nicolin Jürgens	<p>Ne, also es gibt in der Tiermedizin ganz strenge Regeln welche Arzneimittel eingesetzt werden müssen. Und zwar erstmal, wenn es ein tiermedizinisches Produkt gibt für eine bestimmte Indikation für eine bestimmte Tierart, dann muss das genommen werden. Selbst wenn man jetzt z.B. weiß, dass das reizend wirkt und der gleiche Wirkstoff im humanmedizinischen Produkt wirkt nicht reizend. Dann muss man eigentlich trotzdem das tiermedizinische Produkt nehmen und erst wenn man dann bei dem einen Patienten feststellt das es reizt und er das nicht verträgt, dann kommt quasi diese Umwidnungskaskade in Gang. Dann kann man gucken ob es ein tiermedizinisches Produkt für die Indikation für eine andere Tierart gibt und dann müsste man das nehmen. Wenn es das nicht gibt, dann ein tiermedizinisches Produkt für eine andere Indikation, was man aber auch am Augen einsetzen könnte. Erst wenn es das alles nicht gibt, dann darf man auf ein humanmedizinisches Produkt umwidmen und umsteigen.</p>	<p>No, in veterinary medicine there are very strict rules on what medicines need to be used. If there is a veterinary product for a specific indication and animal species, then this needs to be used. Even if it is known to be irritating and the same active ingredient in the human medical product is not irritating. Only when it is discovered that it has an irritant effect on this particular patient and he or she doesn't tolerate it, then you are allowed to use the „Umwidnungskaskade“ [special part in the German Law]. Subsequently, it is permitted to use a veterinary product for the same indication but for a different animal species. Only if this doesn't exist is it allowed to look for veterinary products for other indications. Of course these must also be approved for use on the eye. Only if all this does not exist, then one may rededicate and change to a human medical product.</p>

Lea Hüser	Wer legt das fest welche Produkte genutzt werden müssen? Ist das irgendwo hinterlegt?	Who determines which products need to be used? Is this defined somewhere?
Nicolin Jürgens	Ja, das ist letztendlich die Tierärztliche Hausapothekenverordnung in der diese Umwidnungskaskade festgelegt ist.	Yes, the „Tierärztliche Hausapothekenverordnung“ [German regulation, in short TÄHAV] defines this „Umwidnungskaskade“.
Lea Hüser	Und da sind nur medizinische Produkte festgelegt oder auch Pflegeprodukte?	And there are only medical products specified or also care products?
Nicolin Jürgens	Ne, also es sind wirklich Arzneimittel für die das so speziell gilt. Bei Pflegeprodukten ist das alles relativ „egal“. Die Tierärzte müssen sich da sehr genau an spezielle Regeln halten welche Produkte Sie nehmen dürfen. Es gibt natürlich nicht jeden Wirkstoff auch Tiermedizinisch und wenn es aus bestimmten Gründen der spezielle Wirkstoff sein muss dann kann man da schon schneller aufs Humanmedizinische zurückgreifen, aber man muss sich da schon an spezielle Regeln halten. Aber wie gesagt, dass betrifft nur Arzneimittel und keine Medizinprodukte in dem Sinne und auch keine Pflegeprodukte.	No, that really only applies to pharmaceuticals in particular. With care products, all this is fairly unimportant. The veterinarians have to follow very strict rules about which products they are allowed to prescribe. Not every active ingredient is also available in veterinary medicine. If, for certain reasons, it has to be a special active substance, then you can draw back on human medicine more easily, but you have to follow special rules. As I said, however, this applies only to pharmaceuticals and not to medical devices and care products.
Lea Hüser	Sehen Sie denn einen Bedarf an mehr Augenpflegeprodukten für Pferde?	Do you see a need for more equine eye care products?
Nicolin Jürgens	An was denken Sie da?	What do you have in mind?
Lea Hüser	Sollte es zum Beispiel mehr Augentropfen oder Pflegetücher geben?	For example, should there be more eye drops or care wipes?
Nicolin Jürgens	Also es gibt Pflegetücher, die für die Augenumgebung von Tieren speziell sind. Solche Feuchttücher... Die gibt es auf jeden Fall von einer Marke, die kann man verwenden. Ansonsten Augentropfen zur Pflege fände ich prinzipiell nicht unbedingt sinnvoll. Sondern eben auch Tropfen oder Salbe nur dann, wenn	There are care wipes that are especially for the eye environment of animals. These wet wipes... You can definitely get them from a brand and you can use them. Eye drops for care would not necessarily make sense to me. would only use drops or ointments that contain active ingredients if there is a medical problem

	<p>Wirkstoffe enthalten sind und es wirklich ein medizinisches Problem gibt, dass behandelt werden muss. Aber jetzt einfach nur zur Pflege etwas reinzutun... Das einzige was da eventuell sinnvoll sein könnte wäre es befeuchtendes für die Hornhaut, aber da gibt es eigentlich auch genug. Also jetzt nicht nur speziell für Pferde zugelassen, aber für Tiere zugelassen oder eben auch humanmedizinisch.</p>	<p>that needs to be treated. Apply something only for care... The only thing that could be useful would be something moisturizing for the cornea, but there is actually enough. Of course not only products that are approved for horses in particular, but also for other animals or even human medicine.</p>
Lea Hüser	<p>Haben Sie Augenpflegeprodukte, die Sie speziell empfehlen? Oder mit denen Sie besonders gute Erfahrungen gemacht haben?</p>	<p>Do you have eye care products that you recommend? Or that you have had very positive experiences with?</p>
Nicolin Jürgens	<p>Ja, also es gibt so ein befeuchtendes Pflegeprodukt - das kann man auch als Tränenersatzprodukt bezeichnen – was ich relativ viel bei Kleintieren und bei Pferden einsetze. Das heißt an-HyPro von der Firma an-vision, die sitzen bei Berlin Henningsdorf und stellen das her. Das ist einfach sehr sehr hoch konzentrierte Hyaluronsäure. Deutlich höher als eigentlich in allen anderen Augenprodukten. Zumindest allen die mir bekannt sind. Weil es wirklich 1,2% Hyaluronsäure enthält und alle anderen liegen da deutlich drunter. Aber das setze ich bei Pferden sowieso relativ selten ein, weil die damit nicht so Probleme haben wie Kleintiere. Das sie jetzt offene Augen z.B. haben. Das die jetzt extremst zugempfindlich wären oder so.</p>	<p>Yes, there is a moisturizing care product - which can also be called a tear substitute product - which I use quite often with small animals and horses. It is called an- HyPro from the company an-vision, they are based near Berlin and produce this. This is a very high concentrated hyaluronic acid, Significantly higher than in all other eye products. At least all those I know about. Because it really contains 1.2% hyaluronic acid and all the others are way below that. But I use this quite rarely with horses, because they don't have as many problems with it as small animals. That they now have open eyes for example. They are not very sensitive to draught or something.</p>
Lea Hüser	<p>Gibt es denn Unterschiede in der Behandlung von Pferdeaugen und dem Einsatz bei Kleintieren oder Hunden?</p>	<p>Are there any differences in the treatment of horse eyes and the use with small animals or dogs?</p>
Nicolin Jürgens	<p>Ja, also von den Präparaten her gibt es sicherlich auch Unterschiede, aber das ist vielleicht noch das wenigste. Also von den Wirkstoffen her. Aber vor allem von der Applikation. Bei Pferden finden die</p>	<p>Yes, there are certainly differences between the preparations regarding the active ingredients, but these are less relevant. The main differences are in the application. With horses most owners</p>

meisten Besitzer es einfacher Salben zu verabreichen als Tropfen. Bei Kleintieren finden die Besitzer es in der Regel einfacher Tropfen zu verabreichen als Salben. Das ist auf jeden Fall ein deutlicher Unterschied. Bei Pferden kommt halt auch dazu, dass die meisten nicht direkt bei den Besitzern wohnen. Das gilt jetzt nicht bei Augenpflegeprodukten, aber bei Augenmedikamenten, Tropfen oder Salbe. Wenn Sie irgendein medizinisches Problem haben und wirklich behandelt werden müssen ist es teilweise so, dass die Augen sehr intensiv und sehr häufig behandelt werden müssen. Also sagen wir mal so 6 Mal täglich. Das ist bei einem Kleintier, was sowieso die meiste Zeit beim Besitzer ist häufig leichter durchzuführen als bei einem Pferd, dass häufig irgendwo in einem Pensionsstall steht und die Besitzer nur einmal am Tag da sind. Das ist wirklich häufig eine Herausforderung. Wie gesagt, dass betrifft ja häufig keine Pflegeprodukte, sondern nur spezielle medizinische Indikationen. Wenn es wirklich sehr kritisch ist, dann werden Pferde auch häufig genau aus diesem Grund - oder unter anderem aus diesem Grund – in Kliniken stationär aufgenommen, damit Sie halt so häufig behandelt werden können. Beim Auge ist es ja auch so, dass die Augen durch den Lidschluss und den Tränenfluss die Medikamente, die lokal aufgetragen werden, auch relativ schnell wieder verschwinden. Dann ist zwar erstmal eine sehr hohe Konzentration am Auge, aber das hält nicht lange vor. Das ist jetzt zum Beispiel etwas anderes, als wenn man eine Tablette schluckt. Den Wirkstoff hat man natürlich deutlich länger im Körper.

prefer to administer ointments rather than drops. With small animals, owners usually prefer to administer drops rather than ointments. In any case, this is a clear difference. Furthermore, most horses do not live with their owners. This does not apply to eye care products, but with eye medication, drops or ointments this is important. If they have any medical problem and really need to be treated, it is sometimes the case that the eyes need to be treated very intensively and very often. Let's say 6 times a day. This is usually easier to do with a small animal than with a horse. Small animals spend most of their time with their owners anyway. Horses, on the other hand, are often standing somewhere in a stable and the owners only come by once a day. This is indeed often a challenge. As I said, this often does not concern care products, but only special medical indications. If it is really critical, then horses are often brought to clinics for exactly this reason, so that they can be treated that frequently. In the eye, locally applied medication disappears quite quickly due to the closure of the eyelid and the tear flow. Then there is a very high concentration in the eye, but this doesn't last long. This is different, for example, when you swallow a pill. The active ingredient remains in the body for much longer.

Annexe H: Contacted persons and companies that declined an interview

Company	Contact person	Answer	Contacted through
Kraemer Pferdesport	-	No response	Phone and E-mail
Loesdau	Stephanie Kohlstetter	They are not interested in my thesis and consider the topic as too specific and suggested to change my topic into e.g. insect repellents or care in general.	Phone and E-mail
Equiva	-	They do not have time for interviews.	Personal contact
www.fütternundfit.de	Joke Oomen	They are not interested in my thesis.	E-mail
Carr&Day&Martin		They do not have time for interviews.	Phone and Facebook
Pferdeklinik in Parsdorf	Dr. Binder	They have between 300 and 400 horses with eye problems each year but are not interested in an interview.	E-mail
Hanseklinik	Dr. Körner	No response.	E-mail
www.pferdeauge. de	Dr. Neumann	No response.	E-mail
Pferdeklinik Hochmoor	-	No response.	E-mail
Pferdeklinik Rennbahn	-	No response.	E-mail
Tierheilpraxis Iris Braun	Iris Braun	No response.	WhatsApp
PFIFF Pfitzner Reitsport GmbH & Co. KG	-	They do not see a market for equine eye products.	Spoga Horse
niceshops GmbH (known under the brand "Stiefel")	-	They do not see a market for equine eye products.	Spoga Horse