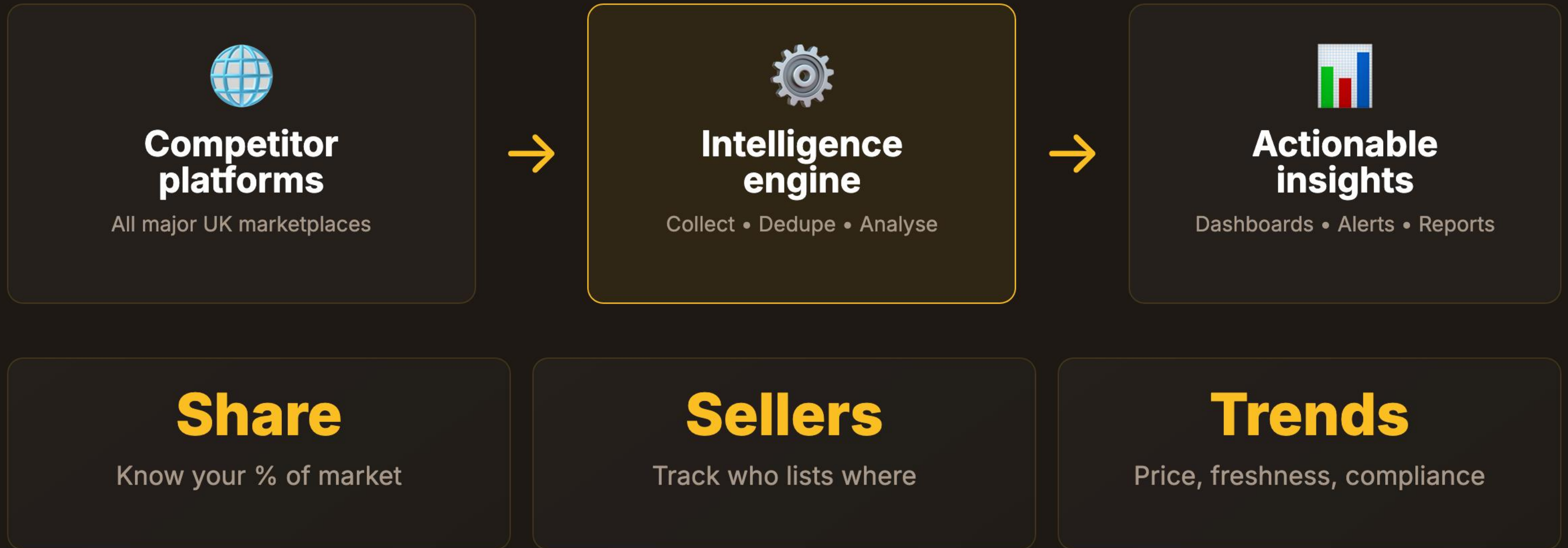


Building Gumtree's supply-side intelligence engine

Who's winning stock, where sellers go, and how
Gumtree performs — across verticals

DOGS CASE STUDY INCLUDED (ILLUSTRATIVE)

Continuous **market visibility**



Questions answered — **every month**

Where is stock going?

Track volume by platform over time

What's our market share?

Gumtree's % of total supply

Who are the power sellers?

High-volume sellers & their platforms

Are we fresher than competitors?

Listing age comparison

What's pricing doing?

Monitor trends by category

Is a drop market-wide?

Separate market vs execution

From pipelines to **decisions**



Vertical dashboards

Live market share, pricing, inventory



Weekly tracking

Automated competitive reports



Anomaly alerts

Competitor behaviour changes



Competitor benchmark

Feature & policy comparison



Executive summary

Monthly strategic brief



Deep dives

Ad-hoc analysis on demand

CASE STUDY

Illustrative example: **UK dogs market**

What the engine output looks like when it's live

94% of all dogs sold in the UK are listed on an online marketplace

59k

Unique dogs
for sale today



893k

Annualised
(29-day avg turnover)



94%

Of total UK market
946k/year · Nature Watch 2025

10 MARKETPLACES ANALYSED

Pets4Homes

FreeAds

Gumtree

Preloved

Puppies.co.uk

Kennel Club

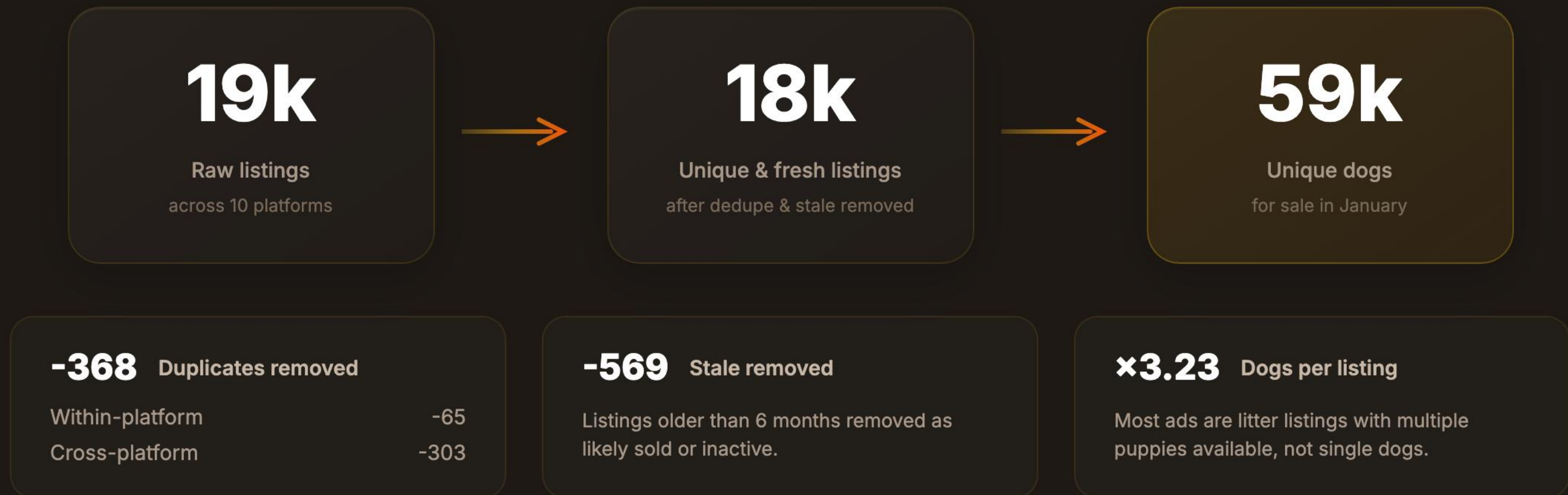
Petify

ForeverPuppy

Champdogs

Gundogs Direct

After deduplication and freshness checks, **18k listings** translate to **59k dogs**



Specialist pet sites list **litters**, not individual dogs

PLATFORM	RAW LISTINGS	RAW DOGS	DOGS/LISTING
<div></div> Pets4Homes	7,617	31,312	4.1
<div></div> FreeAds	6,551	14,258	2.2
<div></div> Gumtree	1,758	4,450	2.5
<div></div> Preloved	654	893	1.4
<div></div> ForeverPuppy	630	2,529	4.0
<div></div> Petify	603	3,315	5.5
<div></div> Puppies.co.uk	575	1,750	3.0
<div></div> Kennel Club	411	2,453	6.0
<div></div> Gundogs Direct	356	378	1.1
<div></div> Champdogs	162	972	6.0
Total	19,317	62,310	3.2

50%

Pets4Homes share

Of all dogs listed across 10 platforms

4.1

Pet specialists avg

Litter-based listings (P4H, KC, Petify...)

2.4

Classifieds avg

Individual dogs (FreeAds, Gumtree...)

94% of sellers have just one listing — private sellers dominate

SUMMARY

Total unique sellers	17,603
With 1 listing only	94%
With 2 listings	5%
With 3 or more listings	1%

SELLER DISTRIBUTION BY PLATFORM

PLATFORM	SELLERS	% 1 LISTING	TOP SELLER
Pets4Homes	7,186	95%	8
FreeAds	5,763	93%	9
Gumtree	1,657	94%	3
ForeverPuppy	586	94%	3
Puppies.co.uk	562	98%	2

TOP 10 SELLERS

#	SELLER	LIST	PLATFORM
1	Pawprints2freedom	81	Preloved
2	Lurcher Link Rescue	11	Preloved
3	justdogz	9	FreeAds
4	The Canine Club	8	P4H
5	Ritchie	8	P4H
6	Wiggle Waggle	7	P4H
7	marta.sobkowiak9911	7	FreeAds
8	Since J	7	Petify
9	5 Star Licensed Breeder	6	P4H
10	Since J	6	Petify

■ Rescue ■ Breeder

42% of high-volume sellers are on FreeAds with no license tracking

UK BREEDING LICENSE REQUIREMENT

3+

Litters per year
Requires a local authority breeding license under the Animal Welfare Regulations 2018

TOP BREEDERS

SELLER	#	PLATFORM	LICENSE
justdogz	9	FreeAds	—
The Canine Club	8	P4H	✓
Ritchie	8	P4H	✓
Wiggle Waggle	7	P4H	✓
marta.sobkowiak9911	7	FreeAds	—

LICENSE TRACKING (3+ LISTINGS)

PLATFORM	SELLERS	TRACKING	DISPLAY %
FreeAds	74	None	0%
Pets4Homes	54	Yes	81%
Preloved	8	None	0%

HOW PLATFORMS MANAGE REGULATION

- Gumtree

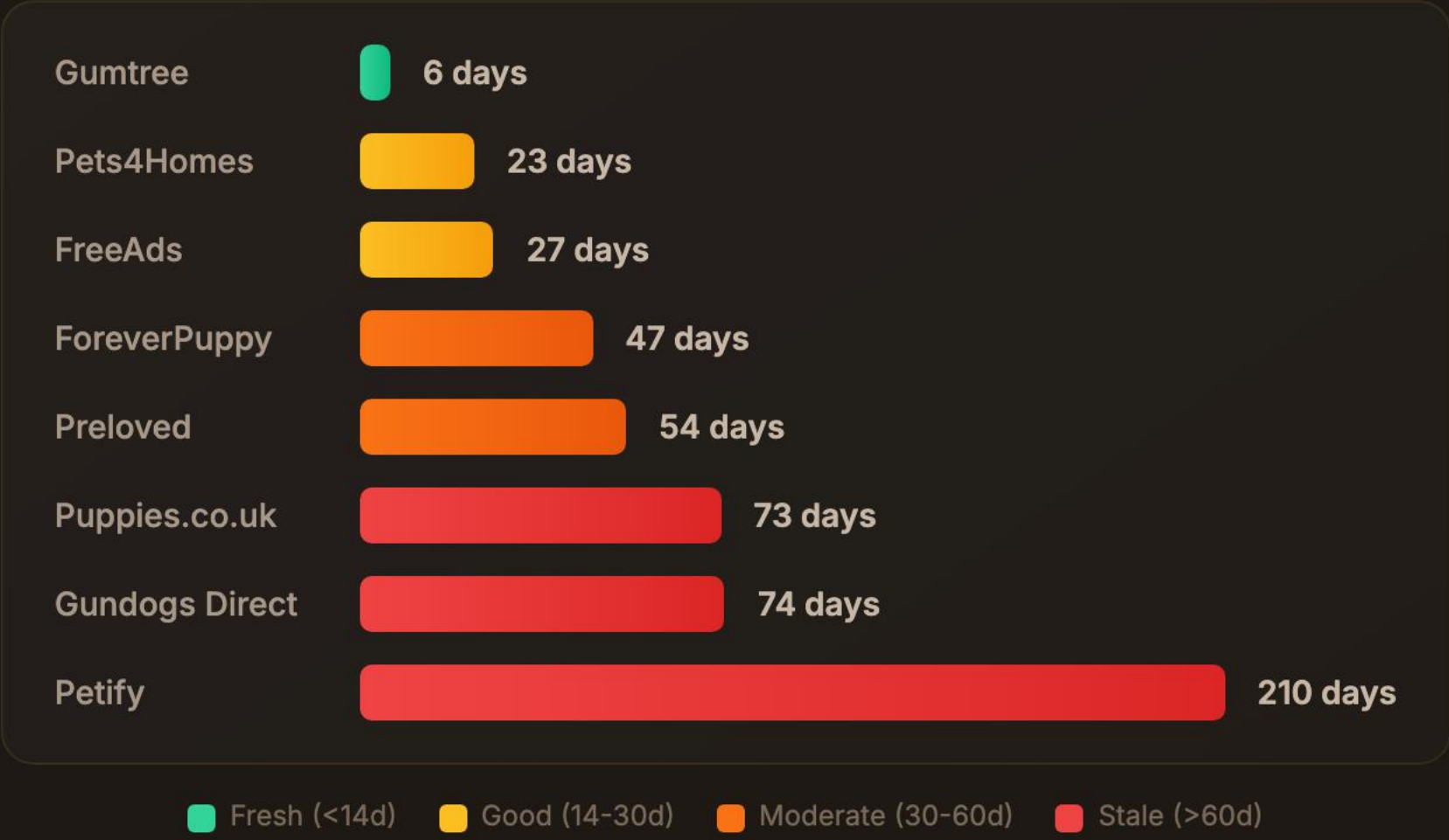
2-litter limit with verification. Sellers listing a 3rd dog must provide license proof. Vetting for licensed breeders & rescues.
- FreeAds

No license verification or seller limits. High-volume sellers operate freely with no accountability.

Methodology: License status from platform fields where available. "3+ listings" used as proxy for commercial breeding activity requiring license under Animal Welfare Regulations 2018. All steps were fully automated using AI-driven scripts and data validation.

63% of Gumtree listings are under 7 days old — freshest by far

MEDIAN LISTING AGE BY PLATFORM



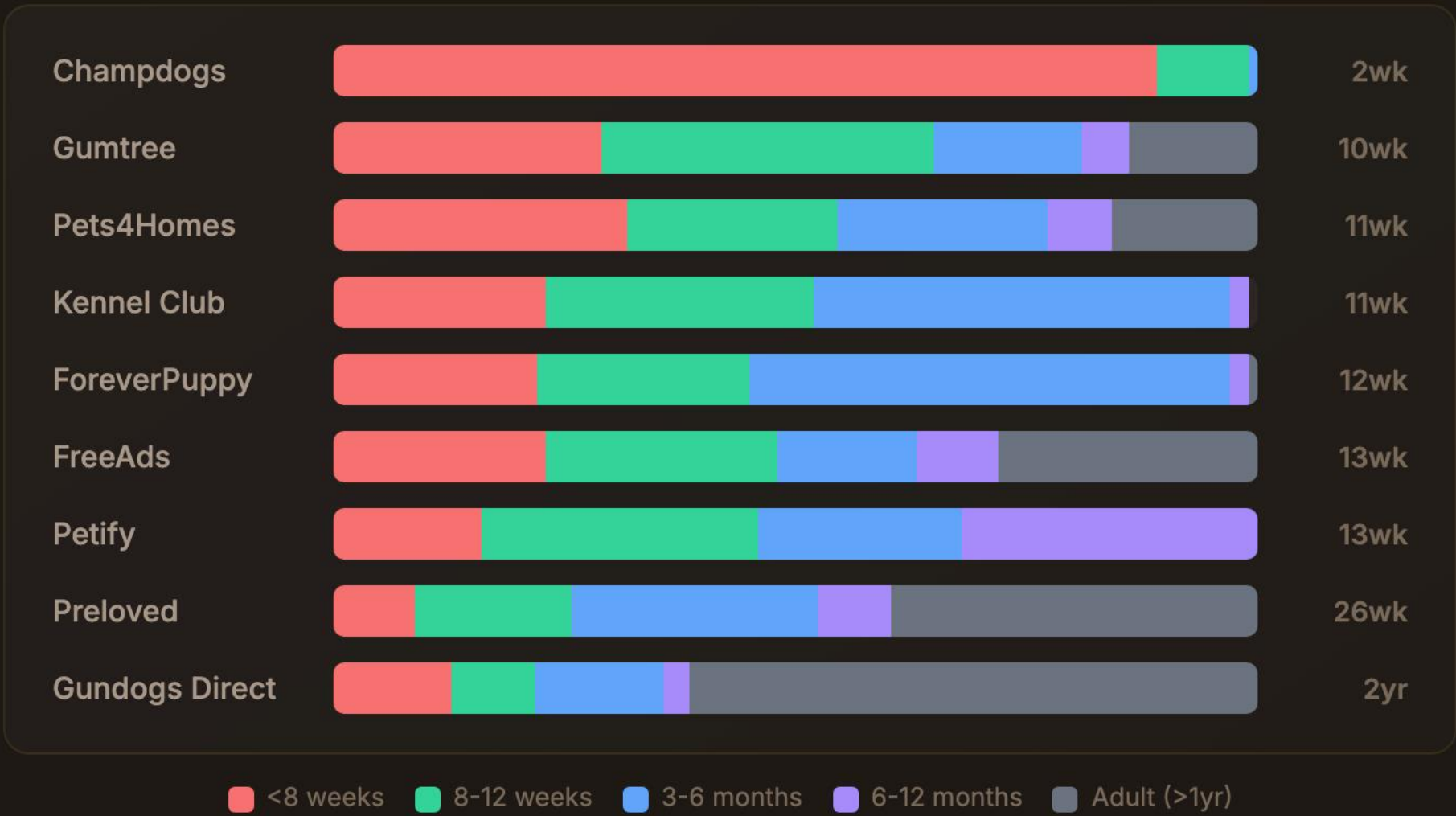
AGE DISTRIBUTION

PLATFORM	<7D	7-30D	30-90D	>90D
Gumtree	63%	37%	0%	0%
Pets4Homes	15%	45%	38%	2%
FreeAds	27%	20%	39%	7%
ForeverPuppy	4%	24%	61%	2%
Preloved	5%	22%	43%	31%
Puppies.co.uk	1%	22%	38%	39%
Gundogs Direct	8%	17%	31%	43%
Petify	2%	4%	17%	71%

Petify — Unusual Pattern
71% of listings over 90 days old, yet puppies average 13 weeks. Ages may be frozen or listings refreshed with new litters.

80-100% of listings are puppies under 1 year — Preloved & Gundogs Direct skew adult

AGE DISTRIBUTION BY PLATFORM



KEY INSIGHTS

~80%

The big 3 marketplaces (P4H, Gumtree, FreeAds) are 72-86% puppies under 1 year old

100%

Kennel Club, ForeverPuppy and Champdogs are puppy-only platforms

40-62%

Preloved and Gundogs Direct skew adult — rehoming and trained working dogs

97-100% of under-8-week puppies on Gumtree & P4H have future ready-to-leave dates

UK LAW: 8-WEEK MINIMUM

8

Weeks minimum age

Under the Animal Welfare Regulations 2018 (Lucy's Law), puppies cannot leave their mother before 8 weeks. Early separation causes behavioural issues, anxiety, and health problems. Platforms should enforce future ready-to-leave dates for young puppies.

HOW PLATFORMS PROTECT PUPPIES

Pets4Homes & Gumtree

Mandatory ready-to-leave field. 100% of under-8-week puppies have future dates set. Buyers cannot collect early.

READY-TO-LEAVE ENFORCEMENT

PLATFORM	<8WK	PROTECTED	%
Gumtree	516	Enforced	100%
Pets4Homes	2,433	Enforced	97%
FreeAds	559	Optional	4%

FreeAds Gap

559 puppies under 8 weeks — 96% have no ready date. Of those with dates, many say "Now". Field is optional with no enforcement.

French Bulldog is most popular with 3,675 dogs — Irish Wolfhound commands highest prices at £3,000

TOP 10 BREEDS BY DOGS FOR SALE

#	BREED	DOGS	%
1	French Bulldog	3,675	6.5%
2	Labrador Retriever	3,639	6.5%
3	Cockapoo	3,300	5.9%
4	Miniature Dachshund	3,177	5.6%
5	Cocker Spaniel	3,065	5.4%
6	German Shepherd	2,084	3.7%
7	Dachshund	1,812	3.2%
8	Cane Corso	1,601	2.8%
9	Staffordshire Bull Terrier	1,429	2.5%
10	Chihuahua	1,162	2.1%

MOST EXPENSIVE BREEDS (AVG PRICE)

#	BREED	DOGS	PRICE
1	Irish Wolfhound	59	£3,000
2	Bernedoodle	98	£2,500
3	Italian Greyhound	120	£2,400
4	Pekingese	59	£2,350
5	Australian Labradoodle	128	£2,250
6	Old English Sheepdog	68	£2,225
7	Australian Shepherd	79	£2,125
8	Miniature Goldendoodle	75	£2,050
9	Boxer	296	£2,000
10	Dachshund (Miniature Long	111	£2,000

Wisbech emerges as a breeder hotspot — a small town ranking #8 nationwide for dogs listed

TOP 10 CITIES BY DOGS LISTED

#	CITY	DOGS	LISTINGS
1	London	869	267
2	Doncaster	809	238
3	Manchester	766	240
4	Birmingham	691	252
5	Liverpool	657	205
6	Nottingham	591	172
7	Leeds	566	259
8	Wisbech	562	150
9	Sheffield	447	145
10	Hull	424	141

TOP 5 REGIONS BY DOGS LISTED

#	REGION	DOGS	LISTINGS
1	West Midlands	1,685	482
2	Greater London	1,641	456
3	South Yorkshire	1,336	352
4	West Yorkshire	1,317	381
5	Kent	1,095	301

 **Wisbech Breeder Hotspot**
Small town (pop. 35k) with 3 of UK's top sellers

Ritchie — 11 listings, Bulldogs, P4H (licensed)
justdogz — 9 listings, Cockapoos, FreeAds
Zoe — 5 listings, Mixed, P4H (licensed)

Dogs pilot **proves the model**



Market sizing works

10 platforms, 19k listings, 59k dogs, 893k/year annualised



Seller behaviour visible

Multi-homing patterns, concentration, platform preferences



Compliance gaps quantified

42% of high-volume sellers on platforms with zero enforcement



Gumtree advantages surfaced

Freshest marketplace (63% <7 days), strong compliance policies

This is what every vertical can look like with the intelligence engine

One engine, multiple verticals

METRIC	PETS	MOTORS	PROPERTY	RECOMMERCE	JOBS	SERVICES
Market share	✓	✓	✓	✓	✓	✓
Listing freshness	✓	✓	✓	✓	✓	✓
Price tracking	✓	✓	✓	✓	—	—
Seller behaviour	✓	✓	✓	✓	—	✓
Compliance	✓	✓	✓	—	—	✓
Cross-platform dedupe	✓	✓	✓	✓	✓	✓

Same pipelines, different schemas — infrastructure is vertical-agnostic

From listings to **intelligence**

Turning the open web into decision infrastructure

Kim Faura

January 2026