

Petcare

Butcher's™ NOURISHING FOOD FOR DOGS



 <p>THE GROCCER GOLD AWARDS 2021</p>	<p>WINNER Petfood Brand of the Year</p>
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Butcher's Nourishing Food For Dogs

Affordable, quality nutrition

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KEY BRANDS

Butcher's Tripe
Butcher's Puppy Perfect
Butcher's Simply Gentle
Butcher's Lean & Tasty
Butcher's Joints & Coat
Butcher's Nourishing Treats for Dogs

2022 has already seen the dog category soar to its highest-ever levels, with annual sales growth of £65m vs last year, of which wet food delivered £28m or 43% of total net category growth¹, reveals Butcher's. During the same period Butcher's, now the best-selling brand of wet food in the UK, has continued to deliver more value growth than any brand of wet food².

"This year will be monumental for the dog food category as the UK exits the pandemic with record-breaking levels of category growth," says the company. "Dog ownership in the UK is now at its highest-ever level with 15.1 million households reporting they own at least one dog³ and with no sign of this groundswell in dog ownership slowing down in the coming year.

"With more pet parents visiting the pet food aisle than ever before, the outlook for the category is incredibly optimistic but this does not come without some significant challenges," it adds. "From maintaining supply through a period of substantial increase in demand, to exciting and delighting a new breed of modern dog owner, all against a backdrop of grocery-wide inflation at levels not seen for decades, 2022 – as with 2021 and 2020 before – will be unprecedented."

With an estimated 1 million more dogs in the UK compared to a year ago⁴, a raft of new owners, with new thinking and beliefs, have entered the category for the first time, notes Butcher's. "The pandemic has shifted the demographics of dog ownership, with more younger families becoming pet parents than ever before," says Rachel Collinson, director – food for dogs. "While these new owners are highly engaged with the quality and nutritional content of the food they



Source

^{1-2,5,6} IRI Petcare, Value Sales, Major Multiples, 52 w/e 29.01.22
³⁻⁴ GWI, Q3 2018-Q3 2021
 Base: 43,000 internet users aged 16-64, Markets: UK, Question: Does your household have pets? (Multiple choice answer options: Cats, Dogs, Other pets, I don't have any pets)



“Dog ownership in the UK is now at its highest-ever level, with 15.1m households³ reporting they own at least one dog and with no sign of this groundswell slowing in the coming year”

feed their families, they are the same group who may be disproportionately affected by the pending cost of living crisis. As real-term incomes are squeezed in the coming year, it's critical we provide affordable access to quality nutrition for dogs. At Butcher's we believe our strategic category role of providing naturally nourishing food that is everyday affordable, is now more important than ever."

Butcher's strategic role in driving category growth has been accelerated by a rapid rise in the brand's range of natural health solutions, up 41% in value YOY⁵. Using recipes developed by nutritionists and vet recommended, this range provides owners with affordable access to natural solutions that prevent some of the most common health issues facing dogs, such as maintaining a healthy weight or improving the condition of joints and coats. "Modern dog owners are increasingly looking for food that helps improve their dog's health and wellbeing," says Philip Cotterill, head of insight at the company. "The Butcher's range of natural health solutions has not only contributed to Butcher's market-leading brand growth, but has also delivered 12% of net wet dog category growth⁶ in the last year."



KEEP YOUR SHELVES FULL
With the number 1 Brand in Wet Dog Food*

IRI Petcare, Value Sales, 52 w/e 29 January 22, Major Multiples

Analysis

For the love of pets

With growing pet ownership in the UK boosting petcare category sales, the market is buoyant, but nevertheless has still seen its share of challenges over the past year



 With the Covid-19 lockdowns having seen an explosion in pet ownership, the Pet Food Manufacturers' Association (PFMA) has estimated that, in 2021, 59% of UK households had pets, with dogs, cats and rabbits leading the field.

With many new owners getting a pet for the first time, the trend to 'humanise' pets in terms of their food and welfare has never been higher, with many focusing on life stage nutrition, as well as personalised diets to suit their pets' individual needs. As a result, the pet care category has been in healthy growth and has attracted a number of new entrants.

However, the challenges of soaring inflation and ingredients costs are likely to take their toll over the coming months, with pet food suppliers warning that retailers will need to stock

a good variety of pet foods at diverse price points to suit different consumer demands.

"The UK is a nation of pet lovers, and even with the massive influx of pets that occurred in 2020 and 2021, new pets continue to enter households," says John Murphy, head of insight at Purina UK&I. "While the rate of acquisition has slowed relatively (as more pets in recent years created a bigger 'base' off which percentages could grow, and some owners took the opportunity to get pets in 2020/2021 who otherwise might have waited until 2022), the number of cats and dogs in the UK will continue to grow.

"The total UK cat and dog food industry is expected to have a compound annual growth rate of 4.5% from 2022 to 2025, leading it to be worth over £4.75bn in 2025¹."

Dog snacks are particularly dynamic due to the impulse-driven and high repertoire nature of the category, explains Ben Vinson, Purina UK&I marketing manager. Within that, he notes that the company's Dentalife product is valued at £7.6m RSV², having also seen a strong start to 2022, up 2% RSV versus 2021. Meanwhile the company's Winalot pouch brand is now valued at £25.6m with a £5m RSV increase YoY and growing by 14.4% in volume terms³.

"The PFMA estimates there are 1million more dogs in the UK as a result of the Covid-19 pandemic and that number is set to continue to grow," says James Kennedy, sales director at Forthglade Foods. "New dog owners are taking more time than ever to research the right food to feed their beloved dogs, and this has meant a



significant step-change to the already strong growth natural dog food has been experiencing in recent years. As the pioneers of natural wet dog food, with over 50 years' experience, Forthglade is an established, trusted and credible natural brand – and that positioning has meant we have benefited significantly in this further shift to natural dog foods.”

Ben Hutton, UK sales director at Yarrah, notes: “We have seen growth in the last year come through strongly in two areas: wet food and treats. In particular, treats have seen significant growth since the Covid-19 pandemic started, with many people working from home and treating their pets more than previously.

“Covid also led to many pet owners looking in more detail at what they feed their pets with a greater interest

in health and wellbeing driving this interest,” he adds. “Organic food saw significant growth in the 2020/21 period as people started to think more carefully about what they eat and how food is sourced. Another aspect of 2020 was the sharp rise in pet ownership and many of these new owners placing health and sustainability at the heart of their purchasing decision.”

Natural ingredients and healthy options are certainly becoming more important in product selection among pet owners, particularly those who have taken on a pet for the first time.

Evidence in the market is that pet parents are looking for more natural options when feeding and treating their pets, says Andrew Tyers, head of category management at Spectrum Brands Pet Care, owner of Armitage.

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Analysis

“Trends suggest that, over the last year, new pet parents are trading into advanced nutrition food recipes, with advanced nutrition driving £6.3m growth in dry cat food and with £1.5m driven by the kitten life-stage⁴. The growing understand of the importance of feeding life-stage-specific food is also evident in the market with senior driving £3.2m in dry cat food sales⁴.”

Sales of treats and dog toys have also increased in the latest 52 weeks with the company’s Good Boy dog treats up 23.5%⁴ and sales of dog toys up 18%⁴, bringing an incremental £22.5m⁴ worth of sales into the brand, he notes.

“Dog owners are becoming increasingly aware that what they feed their four-legged friend has a significant impact on their health and wellbeing,” says James Kennedy, sales director at Forthglade Foods. “With the ability to research in-depth through the internet, it is clear that many new and existing dog lovers are switching to a natural diet for their dogs.

“Natural dog food is now the key driver of category growth and there doesn’t appear to be any sign of this growth slowing down throughout 2022 and beyond. Dog owners are looking for brands they can engage with and trust. They expect clear accurate labelling, clean ingredients decks that are recognisable and which mirror front-of-pack detail.”

As a result of this, he adds, many new brands are appearing on shelves as start-ups look to capitalise on the natural pet food trend.

“Consumers continue to opt for more personalised natural pet food choices and are looking for increased health benefits to help maintain digestive health, mobility and healthy skin and coat,” says Purina’s Vinson. “Pet owners look for reassurance that their choice of food is every bit as healthy as it is tasty.”

Keeping brands front of mind

Spectrum Brands Pet Care is changing the positioning of its marketing for Armitage this year, allowing the company to tap into previously unexplored opportunities, says Tyers. “We invested in above-the-line TV commercials, will have a strong presence at [international dog show] Crufts and, with new



merchandising campaigns in all channels, we will continue to grow the brand.”

Social media has become an important part of the marketing strategy, he says. Following the successful integration into the Spectrum family, we will be focusing more on using social media in our marketing campaigns in 2022, working in a more streamlined approach to utilise the power of social media and the influence we see in the pet category.”

For Forthglade, Kennedy says that, in many cases the brand will stand out significantly through impactful point-of-sale, secondary space and further in-store communication. The company will also continue its partnership with the National Trust on its Trust’s Dogs Welcome project across locations and on its co-branded National Trust meals and treats.

At Nestlé Purina, cat food brand Felix is going live across the nation with a new TV campaign: Felix – It’s Great to be a Cat. This aims to celebrate

cats’ lovable, mischievous moments and is backed by a multi-million-pound media investment. The company plans to back this up with “some exciting surprises and disruptive activities across a 360-degree campaign”, reveals Vinson.

Meanwhile, within snacks, the company is spending £2.5m to support its Dentalife brand with a ‘28 Day Difference’ campaign, focusing on the difference owners see in their dogs’ dental hygiene routine after using Dentalife ActivFresh, designed to fight bad breath bacteria. Over £2.4m will also be invested in the company’s core dog brands to drive consideration and trial of its portfolio and help drive footfall into store and online.

With Yarrow notching up its 30th birthday this year, it will be celebrating key milestones in the company’s history, including B-Corp status, sustainable packaging and no recall in 30 years, says Hutton. “We will also be looking to the future in terms of exciting new innovation coming through the range,” he says.



Challenging market conditions

Despite overall success in the petcare category, 2021 has not been without its challenges as the labour crisis and HGV driver shortages, not to mention increasing ingredients costs, took their toll. Moreover, the current inflationary environment in the UK is also going to make for difficult market conditions in the year ahead.

“In 2021, as online sales boomed, cardboard became more scarce prompting much higher prices,” notes Ben Hutton, UK sales director at Yarrow. “This affected pet food

as well as many other categories.”

Indeed, the cost of cardboard has soared as changing shopping habits and e-commerce boosted the demand for cardboard boxes, while a decline in recycling rates squeezed supply in the run-up to the 2021 festive period¹.

“In some ways it is positive in that it is forcing many manufacturers to review their packaging,” adds Hutton. “Yarrow uses recyclable packaging material in over 90% of its range, and we are seeing more and

more brands switch to more sustainable packaging.”

Meanwhile, at Purina, the company has been working hard to meet the additional demand, due to the growth in acquisition of pets over Covid, and is producing and supplying more pet food – including cat and dog food pouches – than ever before, reports Ben Vinson, marketing manager at Purina UK&I. “However, like many FMCG companies, our end-to-end supply chain has been very stretched from the sourcing of raw materials and

packaging, labour challenges and transport capacity driven by driver shortages,” he says. “Owners feeding Purina pet foods may have found that some of our products are not consistently available in their normal place of purchase and may have to shop around more than usual or choose an alternative food in the short term. We continue to navigate these challenges in collaboration with our customers to maintain availability of our products on-shelf and reduce the impact of any ongoing issues.”

Growing online market

“As with almost every other FMCG category, we have seen online pet sales boom during the pandemic and continue to do so,” says Purina’s Murphy. “In the total market, sales have grown over 9% in the latest year alone⁵, but e-commerce pet sales have almost tripled this growth rate, up 25.9%⁶. This means online sales, which pre-pandemic (to end of Feb ’20) were just short of 15.1% of category value sales, are now 20.6% of total sales⁷. Unlike the migrations between wet and dry products, this shift is one we expect is here to stay, with our forecasts being that e-commerce as a share of total pet sales will have a floor of 20% going forward, and likely to be higher than that still.”

He points out that, with shoppers increasingly looking for value for money and predictability of prices in an uncertain economic environment, this plays into the hands of online retailers’ D2C offerings, subscription services and subscribe-and-save deals. “D2C will continue to become an

increasingly important offering in the petcare category, building on the circa 46% growth⁸ it has seen in the last year alone,” he notes.

Nestlé Purina’s D2C platform is currently championed by its flagship Felix brand, which offers a ‘pick n mix’ solution for consumers to personalise their delivery of cat food, with a box that is designed for the cats to play in and enjoy after.

“This platform is a growing and strategic opportunity for our full portfolio, knowing that personalisation and convenience are much sought after by shoppers across their pet food shopping mission,” adds Murphy.

Regularity and repeatability of purchase on the retailer’s side and potential size and weight from the shopper’s side make the pet food category particularly apt for the D2C medium, he points out – so much so that pet food is the second most used category in the D2C channel⁹ and the fastest-growing channel in the pet food market¹⁰.

“D2C sales are a great way to engage

directly with our customers and provide fantastic customer care,” says Yarrow’s Hutton. “We are enjoying significant growth in this channel and expect it to continue to outpace other channels. We plan to provide direct sales in the UK this spring.”

Drivers and trends in 2022

Nestlé Purina identifies several key trends that are happening in the market. Sustainability and CSV, although not a new trend, will remain a key driver of consumer choice and behaviour, both for 2022 and beyond, says Charlotte Dixon, corporate communications at Purina UK&I. “Consumers are more engaged than ever in understanding the impact of the products and the companies they buy from,” she notes.

Actions by the company include sourcing ingredients responsibly and continuing work to reduce energy, water and waste from its operations. It has committed to halving greenhouse gas emissions by 2030 and reaching net zero by 2050, making 100% of its

Analysis



packaging reusable or recyclable by 2025, as well as exploring a range of protein sources to identify a variety of high-quality ingredients that ensure it has a sustainable supply of pet food now and into the future.

“Advanced health as a category continues to be a growth engine for pets,” adds Purina’s Murphy. “Existing shoppers continue to demand better health for their pets, across all their life stages, and new pet owners want to start their journey with the best nutritional food.”

Finally, bulk buying has been the stand-out growth format of recent years, and in particular the pandemic period, he notes. “This is one of the trends that shows no signs of stalling, so we expect to see this as we move into 2022 and beyond. Looking at Winalot pouches as an example, we expect to see the trend of bulk buying affecting both main meals and snacks.”

Yarrah’s Hutton points to the fast growth in plant-based food for pets. “This is taking off in human food, of course, and now really starting to become established in pet food too,” he says. “Yarrah has been offering plant-based food for dogs since 1995, initially

to support dogs having difficulty digesting animal proteins. Whereas, a few years ago, most pet owners would not have considered a plant-based diet, now it is becoming more mainstream as owners understand the significant health benefits. The humanisation of pets is ongoing. As pet owners apply their own buying motivation to purchases for their pets, the pets’ diets become more natural and of high quality.”

The increased cost of living in the current inflationary environment is going to impact on the petcare category as much as any other. These include a rise in the cost of ingredients, raw materials, component parts, energy and transport. So having a range of pet food products to suit all budgets and lifestyle stages is going to be important over the year ahead.

“On the converse side, the over-index in desire of new owners to indulge their pets has meant there has been an increase in demand for higher-priced pet food. Overall, an increased demand for snacks, combined with the higher average £ per kilo price points has led to an increase in total category average £/kg of almost 5%, with Purina

contributing 130 bps of this increased rate¹,” says Murphy.

However, Yarrah’s Hutton says the company has seen no evidence of reduced expenditure on pets. “As in previous downturns, spend on children and pets seems to be the least affected by reduced budgets,” he says.

Spectrum Brands’ Tyers agrees, noting that the evidence in the market suggests pet parents are continuing to invest in their pets’ welfare, with the average UK household increasing pet spend by 2% compared to 52 weeks ago¹². “Premiumisation continues to be a key market trend, with price per volume also increasing by 2% year-on-year¹³,” he says.

It seems that, while the market might be getting tougher, responsible parents will continue to go above and beyond in nurturing their pet companions.

Sources

¹ — Purina internal forecasts, compiled from various sources, Feb '22

^{2,3,11} — IRI Market Advantage total cat and dog food value sales, 52 w/e 22.01.22 vs prior period; Feb'22

⁴ — Nielsen Scantrack, 52 w/e 01.01.22

^{5-8,10} — Purina estimates, based on consolidated market data

⁹ — Purina and Kantar research, December 2021

¹²⁻¹³ — Nielsen Panel, 52 w/e 01.01.22

Challenging market panel

¹ — <https://news.sky.com/story/supply-crisis-why-a-cardboard-box-shortage-is-escalating-across-the-uk-12501935>

Forthglade Foods

Natural and functional dog treats

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KEY BRANDS

Forthglade
 – Plant-based dental sticks: 170g, RRP £3; 4 x 170g/20 sticks, RRP £10.80
 – Limited-edition meal in support of Veterans with Dogs, 395g tray, RRP £1.55
 – Soft bites, 90g, £2.15

 Forthglade's new plant-based dental sticks, made using natural ingredients and developed by vets, are "ideal for supporting strong teeth, helping to remove tartar and plaque, and freshen breath", says the company. Available from March this year, they are grain-free and suitable for dogs aged one year-plus.

Meanwhile, Forthglade is continuing its support of Veterans With Dogs, the UK charity, that trains and provides assistance dogs for veterans diagnosed with mental health conditions such as PTSD. A new limited-edition, grain-free complete meal, available now, is made in Devon and packed with 75% turkey, and includes tasty vegetables, vitamins, minerals and botanicals.

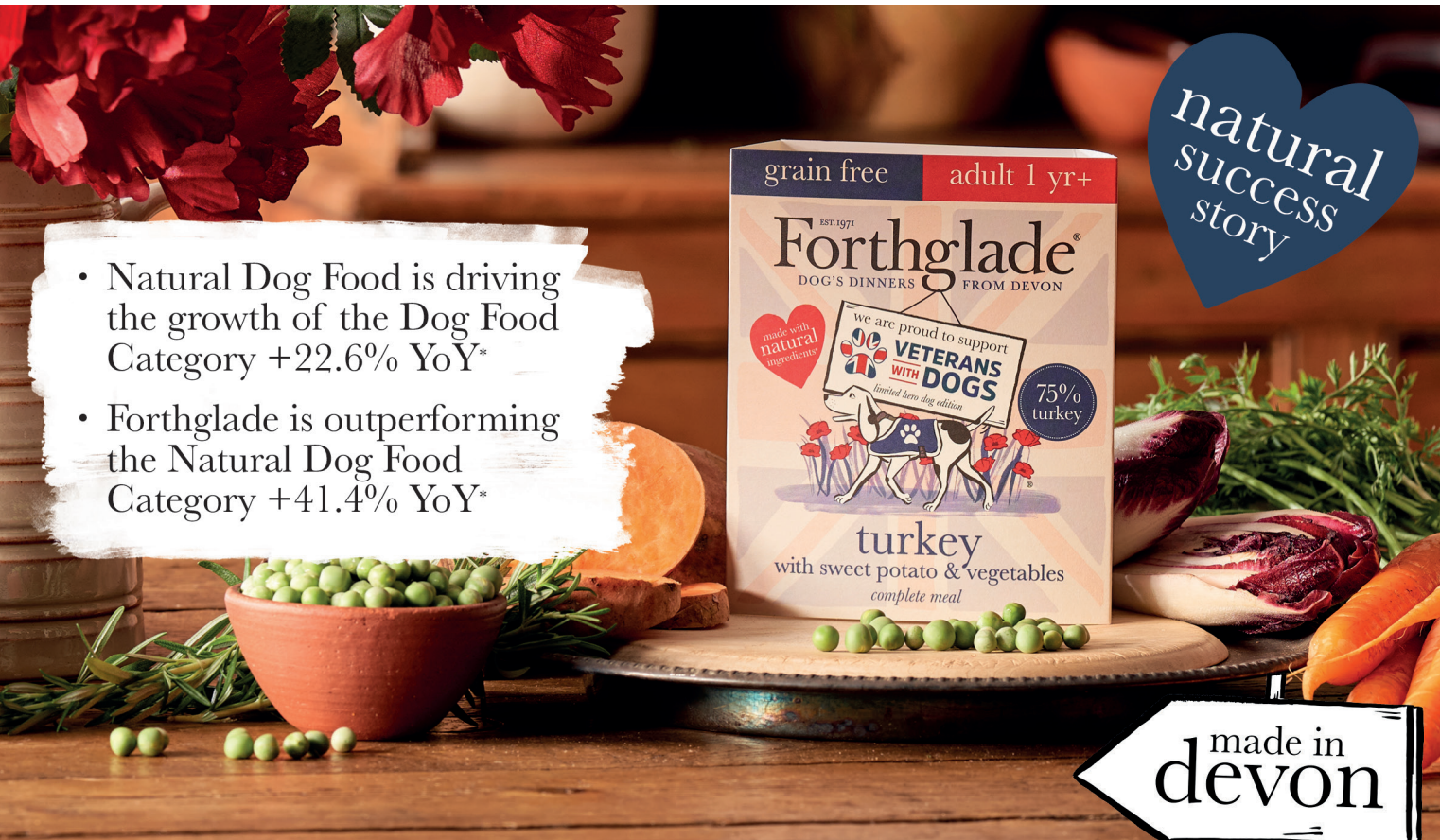
Functional soft bites

Designed with a dog's daily routine in mind, Forthglade's soft bites can be used to reward good behaviour or



“New plant-based dental sticks support strong teeth, help to freshen breath and remove tartar”

simply nourish the relationship with canine companions, it says. Grain-free and made using natural ingredients, the tasty treats are ideal for sensitive tummies. Suitable for dogs aged two months+ and available from April, the three recipes include: Calming treats (camomile, lavender & lemon balm); Fresh Breath (peppermint & parsley); and Rewards (chicken with liver).



- Natural Dog Food is driving the growth of the Dog Food Category +22.6% YoY*
- Forthglade is outperforming the Natural Dog Food Category +41.4% YoY*

For more information on the Forthglade natural success story, contact us at trade@forthglade.com or visit forthglade.com

*Source: (IRI Major Multiples 52 w/e 01 January 2022)

Assisi Pet Care

Tapping into natural growth

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Hollings Dog Treats
HiLife

Founded in September 2020, Assisi Pet Care has seen strong double-digit organic growth over the past 12 months¹, as it continues to deliver against its ambitious plans to become a leading player in the European petcare sector.

Peter Mangion, CEO of Assisi Pet Care, explains: “We saw the opportunity in the petcare market, even before Covid, and decided that it offered a significant opening to build on the big trends of pet humanisation and owners’ concerns to feed their pets with the best-quality foods, snacks and treats. As an animal lover all my life, it is interesting to see how what we feed our pets has changed over the years.”

With two fast-growing natural brands already in its UK portfolio and the recent acquisition of Maced, a long-established Polish manufacturer of natural dog treats, Assisi has started 2022 very much on the front foot, explains Mangion.

“The market is clearly huge and has grown sharply as a result of increased pet populations during the pandemic. There is room for a player like us – one committed to the category, to innovating within it and, above all, focused on the wellbeing of the animals that consume our products.

Hollings – a natural choice for treats

With dog ownership continuing to rise, the demand and desire to feed our dogs the best natural treats continues along with it. Suzy Broughton, brand manager, says: “Modern dog owners, many of whom are new, are very inquisitive and highly invested in ensuring their dogs get the best natural treats available, even if some of their



“The market is clearly huge and has grown sharply as a result of increased pet populations during the pandemic”

dogs’ favourites might not appeal to us humans. Hollings’ existing and extensive range of natural treats continues to go from strength to strength, achieving 30%² growth over the past 12 months and delivering healthy margins to our retail partners.”

HiLife launches into dry dog

With over 80%³ of dog owners feeding a mix of food types, owners are having to compromise on their desire to feed 100% natural ingredients when it comes to the dry element of the daily meal, says Johnathan Dobney, head of sales at Assisi. “So, it was only natural to expand the brand’s range into the dry dog market, with two new recipes at the start of 2022. Offering a range that is 100% natural at a competitive price both delivers what our owners are looking for and will grow the whole category.”

Looking to the future

2022 is set to be another exciting year of growth for Assisi and its brands, says Mangion. “Throughout 2021, we have been laying the foundations for the future of the group to grow our brands and presence in the UK. With our latest acquisition, Maced, we immediately gain a significant market share in both Poland and Germany, and we have some very exciting new launches planned, across our portfolio, for the year ahead.”



Source
^{1,2} Company sales out 52 weeks to Jan 2022
³ Company research, Jan 2022



Pets and people in partnership

Founded in 2020 on a love and respect for pets, at Assisi Pet Care we are **committed to the wellbeing of animals**, innovation and the growth of the pet care market

The Home of

HiLife

Hollings®

Be part of our journey...discover more at
[Assisipetcare.com](https://www.assisipetcare.com)

Nestlé Purina PetCare – Dentalife

Differentiated dental chews

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KEY BRANDS

Dentalife
Dentalife ActivFresh®

 In a highly dynamic category, Dentalife is one of the newer entrants to dog snacks, with its differentiated dental chew offering, explains Ben Vinson, Purina UK marketing manager. The brand, valued at £7.6m RSV¹, has seen a strong start to 2022 with a 2% RSV growth vs. 2021².

“Dentalife has a strong unique selling point based on its ability to clean pets’ teeth naturally – not chemically – and we know this message resonates with consumers,” says Vinson.

For a number of years, Dentalife has been expanding its core portfolio with channel-specific formats, with some exciting NPD for 2022, he notes. “Dentalife ActivFresh is an innovative dental chew that helps to neutralise bad breath bacteria at its source rather than just covering it up, through the use of natural spirulina and honey. ActivFresh is designed with the Dentalife shape, size, and chewy, porous texture that is scientifically proven to reduce tartar build-up.

“We forecast this NPD to drive strong category growth, recruiting new shoppers while also premiumising the category through existing shoppers, via the role and effectiveness of the new, additional ingredients,” adds Vinson. “Dentalife ActivFresh should allow pet owners to further strengthen the relationship with their dog while maintaining effective oral care.”

The main objective of Dentalife’s £2.5m marketing campaign for 2022 is to drive brand consideration and trial of ActivFresh through various touchpoints, focusing on its differentiated and insight-led product proposition, reveals Vinson. “Continuing to build brand equity in a highly competitive and



“Dentalife ActivFresh helps to neutralise bad breath bacteria at its source, rather than just covering it up, through the use of natural spirulina and honey”

impulse-driven market remains key – delivered through our 28 Day Difference campaign. To complement this, off-shelf feature and online POS are also integral to driving impulse purchases.

“As the number of pets has increased and pet parents have spent more time at home with them, the bond between the two has become even closer. Treats have become an increasingly important pillar in the pet food offering and a rise in cat and dog treats sales of almost 12.5%³ has helped fuel an increase in total pet food sales of over 9%⁴.

Premiumisation is a long-term driver of pet food sales and will continue to be a trend in the early months of 2022 with the launch of Dentalife ActivFresh. Premiumisation is relatively equal across cat and dog sales, with cat sales growing 8.5%⁵ and dog sales growing 9.4%⁶ in the total market, and luxury cat sales alone growing 13% YoY⁷.

“As people have increasingly focused on their own health and wellbeing during the pandemic, they have also extended this to their pets. Pet owners value the potential health benefits of their pets’ food and products that carry health benefits are in strong demand.

Source
^{1,2} IRI Market Advantage, Pet
 Outlets, Value Sales, 52 w/e
 20.11.21

new

PURINA®
Dentalife®
ActivFresh™
DAILY ORAL CARE

**Designed to fight bad
breath at its source**



**Helps to neutralise bad
breath bacteria rather
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PURINA®

Your Pet, Our Passion.®

Nestlé Purina FELIX

Felix connects with shoppers

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KEY BRANDS

- FELIX®**
- Original
 - As Good As It Looks
 - Doubly Delicious
 - Sensations
 - Naturally Delicious
 - Tasty Shreds
 - Soups
 - FELIX® Snacks
 - Goody Bag
 - Crispies
 - Play Tubes
- NB: All FELIX brands mentioned in the article are covered by registered trademarks owned by Société des Produits Nestlé SA**

“Over the last few years, there has been a significant surge in pet ownership in the UK, with consumers looking to furry friends for companionship,” says Felix senior brand manager Rebecca Marshall.

Pets have become integral to family units and consumer behaviour is driving premiumisation and treating within the category. Now more than ever, this presents retailers with a huge opportunity to cash in on multiple occasions to stock and sell pet care products throughout the year.

“This pet boom has carved an exciting path for Felix, the UK’s No.1 pet food brand¹, as it launched a brand-new marketing campaign to connect with shoppers and drive them into stores,” she says. “Created in partnership with agency AFG, ‘Felix – It’s Great To Be A Cat’ celebrates cats’ playful and mischievous moments and heroes the special bond between pets and owners.”

Brought to life by an original, catchy jingle, the campaign kicked off with a TV advert in January, which showcased short scenes of the brand’s animated, mischievous cat Felix being coaxed down from out-of-reach spots by a treat or nestled warm and cosy on a rainy day, explains Marshall. “Research shows audio/sonic cues in creatives are 3.4 times more likely to perform well², reflecting the increased prevalence of sound in consumers’ everyday lives through voice activation and sound on social platforms,” she says. “Through the campaign’s engagement with audio, the new Felix jingle will further enhance the brand’s connection with shoppers. ‘Felix – It’s Great To Be A Cat’ is set to reach 30 million-plus people, backed by a substantial £3.7m* investment



“Felix – It’s Great To Be A Cat celebrates cats’ playful, mischievous moments and heroes the special bond between pets and owners”



comprising TV, VOD, radio, shopper and social.”

What’s more, as the campaign rolls out and the jingle is cemented in shoppers’ minds (and ears), consumers can participate in a playful AR game – tapping into the popularity of social challenges, reveals Marshall. Limited-edition versions of the brand’s best-selling 12 and 40 packs of As Good As It Looks Ocean Feasts and As Good As It Looks Mixed Selection in Jelly will further drive awareness of the new creative, rolling out in stores from mid-2022.

Leading the field

For the past five years, Felix has held the leading position in the pet care market. The brand is worth over £260m³ – almost twice the size of its nearest competitor – and is experiencing 10.7% YOY growth (2020-2021)⁴.

“Underpinned by a diverse portfolio, spread across Cat Main Meal, Snacks and direct to consumer business (Felix Pick n Mix), Felix has built its success through its core pillars of mischief and irresistibly tasty food,” says Marshall. “The brand continues to deliver delicious, varied food to cats through a lovably mischievous animated personality and reminds consumers not only why they love their pets, but why it’s great to be a cat.”



Source

¹ IRI 52 w/e 29.01.22
² The Power of You: Why distinctive brand assets are a driving force of creative effectiveness. 2020 Ipsos Views
³ IRI 52 w/e 29.01.22
⁴ IRI 52 w/e 29.01.22
*Rate Card Value



felix
**IT'S GREAT
 TO BE A CAT!**

Stock up NOW on the

No. 1 Pet Food Brand

*Source: IRI 52 w/e 29 January 2022, Value Sales



*The No. 1 Pet Food Brand, IRI All Outlets + KWP Discounters 52 w/e 29 January 2022, Value Sales
 © Reg. Trademark of Société des Produits Nestlé S.A.



Your Pet, Our Passion.®

Nestlé Purina PetCare – Winalot

Winning in the wet pouch market

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KEY CONTACTS

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KEY BRANDS

**Winalot Meaty Chunks,
Puppy, Senior (7+) and
Small Dog (1-10kg)**

Source

- IRI Market Advantage, Petfood, Value Sales, Value Sales vs yr ago & Avg Volume Price, All Outlets (Pet) 52 w/e 01.01.22.
- Kantar GB, Dog – Wet Buyers (000), Actual, Total Stores 12 w/e 26.12.21
- Insight Consulting UK, commissioned by Purina, 08.21
- £1m Rate card investment*

2021 has been another winning year for Winalot pouch. In the wet dog pouch category, the brand is valued at £25.6m RSV as well as being the largest grower (+£4.2m) and No.1 in absolute shopper numbers¹⁻². Purina marketing manager Ben Vinson attributes this to Winalot’s “natural affordable proposition”, saying: “We know our consumers want both taste and nutrition, all at an accessible price.”

Research indicates that 74% of shoppers buy pouches and that feeding wet and dry combined is on the rise with 70% of owners dual feeding³. “Pouches are perfectly sized to mix in with dry,” says Vinson. “They’re easy to feed, make little mess and are great for portion control. From a sustainability stance, our cardboard is recyclable and our pouches are recyclable through the Flexible Plastic Fund.”

As shoppers spend almost double per kilogram when moving from can to pouch, there is an excellent



“Winalot accounted for over 90% of the wet pouch category’s growth in 2021”

opportunity here, particularly with Winalot, which accounted for over 90% of the wet pouch category’s growth in 2021¹. Vinson says: “Winalot continues to innovate at pace, recently launching our new Small Dog range and investing £1m behind our award-winning Great British Dogs campaign, driving awareness of our complete range from puppy to adulthood and beyond⁴.”



Natural, Great Tasting Nutrition



£25,6m
Winalot
Pouch RSV**



“Molly absolutely loved this and enjoyed every flavour.. Tasty and grain-free!”

Sparkleandshinetime
Somerset, Oct 2020

- ✓ Largest growing wet pouch brand +£4.2m RSV**
- ✓ Responsible for over 90% of wet dog pouch category growth**
- ✓ Supported by £1m national media campaign***

made with
NATURAL
INGREDIENTS*



Yarrah Organic Petfood

Organic, sustainable pet food

DETAILS

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KEY BRANDS

Yarrah

Source

- ¹ National Retail Federation, 2020
- ² Nielsen data, 2020
- ³ Soil Association data, 2020 and 2021
- ⁴ Internal research by Yarrah, data 2016-2021

 Pet owners are increasingly conscious of their pet's health, the environment and animal welfare, says Yarrah. Nearly six in 10 pet owners¹ are willing to change their purchasing habits to help reduce their impact on the environment, and 66% of consumers² will pay more for sustainable products, it says. Organic grew by over 12% in 2020, and in 2021 it continues to outpace non-organic³, demonstrating a widening appeal. Switching a pet to organic food can result in many health benefits. A study carried out with over 600 customers who switched to Yarrah showed 87% of owners saw a positive change in their pets⁴, such as improved digestion, increased energy, less itching, healthier skin and shinier coat.

Yarrah, one of Europe's leading organic pet food brands, produces only organic food for cats and dogs, including dry, wet and treats in 100% recyclable packaging. "Pet health is our top priority, reflected in the high



“A study with over 600 customers showed 87% saw a positive change in their pets' health”

quality of our sustainable products,” says CEO Bas van Tongeren. Yarrah's pure ingredients, organically certified, contain no added chemical colourings, aromas, pesticides, antibiotics or GMO.

Yarrah is sold in organic and natural food retailers Abel & Cole, Planet Organic and Whole Foods, as well as pet food stores. It will announce a new distribution deal shortly.

DOING GOOD. FOR OUR PETS. FOR OUR PLANET.



ORGANIC = BOOMING

Organic, high-quality pet food sales are increasing by 10% year on year.

CONSCIOUS CONSUMERS

Yarrah's organic products are perfect for the increasing number of pet owners who want to protect the world we live in.

HEALTHY PET FOOD

87% of pet owners see a positive change in their pets after switching to Yarrah, including improved digestion and energy levels, as well as healthier skin and coats.

YARRAH



Spectrum Brands Pet Care

UK's No 1 dog treat brand

DETAILS

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KEY BRANDS

Good Boy
Meowee!
IAMS
EUKANUBA
FURminator
Tetra
SmartBones

Currently the UK's No.1 dog treat brand, growing 23.5% in the latest 52 weeks¹, the Good Boy brand is extremely distinctive within the dog treat market, says Armitage Pet Care, which was acquired by Spectrum Brands in 2020.

“The quirky illustrative assets paired with the vibrant colouring on-pack really helps to create a playful, lovable and fun brand, which resonates with our consumers and stands out on-shelf and online,” says Andrew Tyers, head of category management at Good Boy. “But we aren’t just a pretty face...

Brand performance

“Good Boy was responsible for nearly half (47%) of all dog treat NPD sales over the last 52 weeks in UK FMCG, adding £5.2m sales to the category²,” says Tyers. “Always striving to offer choice and innovation to the brand, we saw many stand-out successes in 2021 with the launches of: Tough & Tasty – Good Boy’s new rawhide-alternative chews; Super-licious – bringing high meat content treats into the reward fixture; and Chompers – meat-free dental chews, made with natural ingredients, which have brought some much-needed incremental spend into the dental category.”

Maximising occasion spend

With an abundance of dog treats available, ease of shop is extremely important in the high-impulse area of dog treats and toys, says Tyers. Making sure that the fixtures are easy to navigate and have the



“Shoppers are wise and know that, when a product is value for money, they will pay more. But ultimately, the pet is the gatekeeper”

right call-outs for the shopper are key to maximising occasion spend. “There has been huge improvement in this area within major grocers over the past few years, with most retailers now segmenting treats into four key occasion-led areas of reward, occupy, dental and real meat,” notes Tyers. “This is something we are passionate about at Good Boy and will continue to work with our retail partners to innovate new ways of improving the message to our shoppers, making it easier and easier for them to find and buy the treats their dogs love so much.

Pets are the gatekeepers

“Premiumisation is a key trend, but should not be mistaken for shoppers wanting to pay more for the same old thing,” notes Tyers. “Shoppers are wise and know that, when a product is value for money, they will pay more. But ultimately, the pet is the gatekeeper. They need to love what they are being treated with or it’s just not worth it. “Good Boy simply puts dogs at the heart of everything we do, which really makes us stand out from the competition,” he adds. “We just love to treat them well with our dog treats and toys; it’s purely about the joy of giving and that’s something that we will unashamedly keep doing.”



Source
^{1,2} Nielsen Scantrack, 52 w/e
01.01.22

GOOD BOY

UK's No.1 Dog Treat Brand*

“Highest sales value increase within the top 10 petcare brands”

The Grocer, Dec 2021



+£22.5 million sales in 2021*

Growing 3.6x faster than the nearest competitor*

Find out range at www.goodboy.co.uk

*Nielsen Panel 52 w/e 01/01/22

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