

27 JUNE 2020

GUIDE TO...

The Grocer

PETCARE



ANALYSIS



PAWS FOR THOUGHT

During these uncertain times, never before have our furry, scaly and feathery friends been so important.

Johanna Thomson investigates what impact this is having on the category





The UK's well-known love of animals has really come to the fore during the COVID-19 crisis. Animals are proving to be a lifesaver

for many, providing companionship and consistency in uncertain times. The crisis has also encouraged working from home so people are more able to have the pet they always longed for and spend time with it.

The benefits of pet ownership for health and wellbeing are well-documented, reducing loneliness and anxiety, lending daily structure, and lifting mood. And that's in normal circumstances. But it is not only dogs and cats that bring benefits, reptiles, small furies and feeding wild birds have also lifted people's spirits.

Unsurprisingly, Google searches for "buy a puppy" and "adopt a puppy" rose by +120% and +133% respectively during the early part of the year.

COVID-19 has also created a seismic shift in how pet owners shop. "Our own online sales and subscriptions trebled during lockdown," says Ben Mankertz, head of sales, Laughing Dog (Fold Hill Foods Ltd). With over 70% of traffic being from new customers. A recent survey conducted with our online customers at Laughing Dog showed that guaranteed next day delivery was the number one factor for moving to online subscriptions. There is therefore a huge opportunity here for supermarkets to ensure they secure the confidence of pet parents – it's critical to offer a varied selection of pet foods to ensure that consumers are not tempted elsewhere to fulfil their pets' specific needs."

Tony Parkinson, MD of HiLife, agrees, saying: "Coronavirus has accelerated the shift to digital sales and home deliveries. The petcare category suits the online sales channel because purchasing habits are predictable and products can be heavy for shoppers to carry, so it's likely to continue."

HEALTH IS AT A PREMIUM

As health trends have swept through the consumer goods grocery space, it is esti-

“Animals are proving to be a lifesaver for many right now providing comfort in uncertain times”

mated that the value of natural petcare brands will be worth over £314m by 2022 (11% growth). This is in part due to buy-in from "more affluent" consumers but natural products are now becoming more mainstream and the norm. This, and the treats category, have boosted the already growing premium sector.

HiLife is convinced that the trend for

natural and premium products is not a fad. "It's real life!" says MD Tony Parkinson. "Most people have easy access to the internet now and we're all using it to make choices about the food we want to buy for ourselves, our families and increasingly for our pets. Different usually costs more, from all-natural to organic, from grain-free to functional ingredients and it will continue to provide growth opportunities at the super premium end of the Petcare category."

"Treats are right up there because we love our pets and want to show them how much we care. It also reflects human snacking trends and if consumers want to replace more of their pets' meals with treating moments, then the sector has a responsibility to produce healthier treats."

Consumers are certainly actively searching for natural foods to feed their dogs says James Kennedy, sales director, Forthglade. "Company research shows 34% of UK dog owners are feeding their dogs natural dog food, with half of those not currently purchasing natural, saying they were likely to do so in the future. 56% of those surveyed confirmed they buy the best quality dog food they can afford for their dog and on switching to a Forthglade diet, 60% of customers have noticed a positive difference in their dog's behaviour, health and appearance."

"One of the key reasons Forthglade has such potential is the attractive pricing for the quality of the recipes. Our complete meals contain 75% chicken, turkey, lamb, salmon or sardine and Forthglade costs half as much on a pence per 100g of meat as some main competitors. We have also seen awareness of the Forthglade brand grow from 4% in 2016 to 20% in 2020, and this will increase with the ongoing marketing support we have planned, including the successful recent partnership with the National Trust."

Armitage Pet Foods believes much of the growth is being fuelled by an increasing desire for owners to be as careful when feeding and treating their much-loved dogs as they

CONTENTS

HiLife: Reveals what makes its ranges so successful **7**

Armitage Pet Care: Drives the growth in dog treats naturally **8**

Butcher's: Gives every dog access to nourishing food **10**

Fold Hill: Premium petfood made accessible with Laughing Dog **12**

Forthglade: Leads the way in natural petcare **13**

Inspired Pet Nutrition: Harringtons crafts solutions for specific pet needs **14**

Lily's Kitchen: Provides healthy and wholesome food for pets **16**

Purina: Shaping the science of pet nutrition **18**

This supplement to The Grocer was published by: William Reed Business Media Ltd, Broadfield Park, Crawley, West Sussex RH11 9RT. Tel: 01293 613400. Editor: Johanna Thomson. Designer: Amber Stoddart. Printers: St Ives. © William Reed Business Media Ltd.

ANALYSIS

» 3 are themselves. “As a result,” says Good Boy’s sales and marketing director, Adam Jaggar, “they are looking for trusted brands with treats that don’t contain any artificial nasties, and are made with 100% natural ingredients.”

This increased interest in the nutritional content of petfood is particularly important with those looking after older pets requiring more specialist diets.

Vanessa Lessing, Purina dry cat marketing lead, says: “With age comes a different set of nutritional needs, and owners are very keen to ensure they give their pets the right food to ensure continued health and happiness. Helping them do this has become a major focus for Purina One, developing tailored products for different age groups. So it’s no surprise that Purina One Senior shopper numbers have grown by 27% in the last year [Kantar World Panel, 52 w/e 17th May 2020], and Purina One overall is now the fastest-growing senior brand in grocery [Total IRI outlets plus Ocado, Value Sales Change vs One Year Ago 52 w/e 25th April 2020].

DEBATE RUMBLES ON

Pouches or cans? Wet or dry? A lot of these decisions are driven by personal preference, nutrition and convenience. However, convenience can come with an environmental price tag. So the debate rages on.

In the last year dog food has been a fundamental driver of overall pet performance, with wet dog leading the way growing ahead of both total pet and total dog food [Kantar, Total Market, 52 w/e 19th April 2020 Vs Prior].

Rachel Collinson, director – food for dogs says: “This success of wet food in the last year has ultimately been shopper-led, driven by the long-term trend towards natural food now becoming an established mass market norm (desired by 84% of dog owners! [Butcher’s Bespoke Research. Conducted by 3 Gem with 1000 Dog Owners, May 2020].

“The category has really benefited from this shift particularly because of the way in which wet brands have reacted to meet and exceed the expectations of modern owners. Following

a brand relaunch in 2019, Butcher’s has been one of the brands that have really resonated with owners by providing a range of naturally nourishing food at an everyday affordable price. This new approach has delivered category leading brand growth of +19% YOY with Butcher’s now being purchased by more owners than any other wetfood brand in the UK [Kantar, Total Market, 52 w/e 19th April 2020 Vs Prior].”

According to HiLife there will always be a place for cans, especially as they can offer better environmental sustainability and they’re great for owners with multiple dogs. Tony Parkinson, MD, HiLife adds: “We know people are living in smaller spaces, with smaller gardens and they are choosing smaller dogs. With less space, convenience becomes a

“ Pouches have a distinctly low appeal for shoppers with a heightened awareness on recyclability ”

priority and more owners are looking to serve up single pouch meals, rather than large cans that would hang around in the fridge. We believe the 100g pouch format of our HiLife it’s only natural dog food range was a key part in the success since launch.”

Harringtons marketing manager Dan Reeves agrees: “Unquestionably wet dog food has been in growth and it’s interesting to see how formats in market are progressing. We understand that pouches have a distinctly low appeal for shoppers with a heightened awareness on waste and recyclability which is where the tray format has an upper hand. Here we’ve seen Harringtons continue to grow substantially, helping the segment achieve 25% growth. The recyclable nature appeals more than ever as the pandemic has shone a light on the environment.”

Cans are a substantial segment with





over 50% share and some brands drive growth in this area. Rachel Collinson, director – food for dogs Butchers, says: “The pouch market has seen growth in recent years with a significant amount of growth in the last year being delivered via the discount channel. During the same period, the can market has also returned to total market growth which has driven record highs for overall category value. With 70% of shoppers actively looking to reduce their environmental paw print, it’s unlikely that non-recyclable packaging formats (like pouches) will supersede those that can be recycled (like cans). There will always be a place for packaging convenience in any category but the true growth driver in this category is quality natural food. Brands and retailers who make food their primary focus will win over those who continue to talk the ‘old’ language of packaging format to shoppers who have moved on.”

TOP TRENDS

Right now natural is top of the consumer’s shopping list, but it means different things to different shoppers and of course to different brands.

There is a growing level of interest around wellbeing and calming, functional feeding, local manufacturing and shoppers questioning ingredients quality – is it human grade, or which part of an animal does it come from. Tony Parkinson, MD, HiLife says: “For us when we’re developing new products, ‘natural’ has to mean a product that’s made with 100% natural ingredients. But that’s not the case everywhere.

“When you stop and think about it, the category has seen a massive change around in only 10-15 years. If you walk along a pet food aisle today, you’ll see many dog and cat food recipes mirroring the choices consumers want to see in their own food.”

Harringtons marketing manager Dan Reeves says: “We know that natural is consistently the biggest theme for shopper and pet owners. They’re looking for authenticity and brands that are trustworthy. Given the recent global pandemic we’re going to see trust »»»

ANALYSIS



» 5 become a stronger persuasive metric in shopper's choice. Pets have really come to the fore in recent months and their role as 'lockdown heroes' has been celebrated virally. We believe we'll see an upturn in pet ownership, and especially in the small dog sector. These pet owners will be looking for foods that deliver on trust and accessibility, and they will be shopped across a wider number of platforms.

"In cat we have recently launched a new range that will drive Harringtons into a sector that is currently lacking a strong natural proposition."

Amitage Pet Care believes the overarching humanisation trend is set to continue. "With pet parents treating their dogs as part of the family, they're looking for dog treats made with 100% natural ingredients so they can reward their dogs with high quality, lovable and tasty treats," says Good Boy's sales and marketing director, Adam Jaggar.

For Fold Hill Foods it is without doubt humanisation and premiumisation trends that are going to continue. Ben Mankertz, head of sales, Laughing Dog (Fold Hill Foods Ltd) says: "With a

“ Pets have really come to the fore and their role as 'lockdown heroes' has been celebrated virally ”

difficult time ahead for the economy it is likely based on previous recessions that pet parents will continue to look for premium products at affordable prices, which is where our Naturally 5 Complete will not only benefit the dog's nutritional requirements but will also be mindful of household budgets tightening."

Lily's kitchen predict that there will be a real explosion in pet ownership. Samantha Crossley, head of marketing explains: "We've seen this starting to happen through Lockdown and think that as the world's ways of working evolve, people's lifestyles will increasingly allow them to experience the joys

of having a pet.

"From our puppy packs to our mature recipes – we understand modern pet parents and we connect with them through our innovative and disruptive communications. We're the brand that can support them through this wonderful journey that is pet ownership.

"We anticipate that the trend towards humanisation of pets will gain further momentum, particularly in the digital age where more and more pets are becoming social media stars in their own right. We undoubtedly then see more pet parents paying closer attention to the contents of what they're feeding their cats and dogs, resulting in more people trading up from mainstream brands. Accordingly, Lily's Kitchen is committed to continually improving recipes and ingredients, as well as expanding our range of occasion-based meals, to meet the ever-increasing expectations of pet lovers everywhere.

So canned, pouched, wet, dry, premium and now even veggie, the petcare category looks set to be one to rely on no matter what economic turmoil lies ahead of us.

HILIFE

HiLife
it's only natural

DETAILS

HiLife
Town & Country
Petfoods Ltd
26 Asfordby Rd
Melton Mowbray,
LE13 0HR
01664 563209
enquiries@
hilifepet.co.uk

KEY CONTACTS

Tony Parkinson
Managing Director
Sarah Alexander
Marketing Director

KEY BRANDS

HiLife
HiLife it's only natural
HiLife Feed Me!

Right now, shoppers are looking for recipes that will enhance the health and happiness of their dogs and cats.

Tony Parkinson, MD for HiLife says, "To a pet owner, a happy pet means a bowl licked clean and often a timely reminder that it's dinnertime! But shoppers are also digging deeper to understand how recipes can benefit their pet's health.

"They want to learn and we love that, because we're proud of our products and the high quality ingredients that go into them.

A NATURAL WINNER

"We've delivered a winner with the recipes in our HiLife it's only natural range. They are made with 100% natural ingredients, packed with meat or fish, grain free and pets love them."



“Fastest selling natural cat treats across the category”

SOURCE
1. IRI Value Sales 52wks to 25 April 2020.

Awarded Top Petcare Launch by The Grocer in 2018, the range's success has continued, "I'm delighted to share that HiLife it's only natural range has outperformed the pet market's growth by 10 times", says Parkinson, "it's providing us with 30% growth year-on-year, which is a fantastic result."

He puts this down to, "Great product development and trust in the brand. What customers see on the outside of the pack is exactly what they get inside it – nothing else!

"Our cat treats are the fastest selling natural treat across the category' and even our kitten food surprised us, selling at three times the original forecast!

Looking forwards it will be a busy time for the HiLife team, with more new products launching, but we are ready to deliver."

HiLife
it's only natural

100% Natural Ingredients
Grain Free



A natural winner
30% growth YoY*
loved by the nation's pets!



hilifepet.co.uk



* Source: Company Sales Out (Jan - May 2020)

ARMITAGE PET CARE

DRIVING DOG TREAT GROWTH



DETAILS

Armitage Pet Care
Armitage House
Colwick
Nottingham, NG4 2BA
0115 938 1200
enquiries@
armitages.co.uk
www.armitages.co.uk
www.goodboy.co.uk
Facebook:
@DogGoodBoy
Instagram:
goodboydog_

KEY CONTACTS

Mark Andrews
Chief Executive Officer
Adam Jaggard
Sales & Marketing
Director
Mike Love
Marketing Manager

KEY BRANDS

Good Boy
Meowee!
Wildbird

➔ Natural simplicity has never been more important within the UK pet care market. With pet parents treating their dogs as part of the family, they're looking for dog treats made with 100% natural ingredients so they can reward their dogs with high quality and tasty treats.

Good Boy continues to drive the total dog treat market growing +£12m in the last 52 weeks¹. In fact, without Good Boy's contribution, the market would have declined².

Good Boy expect to continue to grow the dog treat category by building on the existing range and have more innovation on the way.

Good Boy's sales & marketing director, Adam Jaggard, says: "More than anything else we want to make dogs happy and there's no denying that our tasty treats do just that. We've worked extremely hard to create a diverse range of treats in all different shapes, flavours and sizes so there's a Good Boy dog treat perfect for each and every dog out there."

QUALITY IS KEY

Kantar Worldpanel has identified that 90% of dog owners treat their dogs regularly³. Pet parents are spending a whopping half a billion pounds a year on treats for their dogs - 8.5% market growth in the



“More than anything else we want to make dogs happy and there's no denying that our tasty treats do just that”

SOURCES

1. IRI 52wk end 18.04.20.
2. IRI 52wk end 18.04.20.
3. Kantar Worldpanel 52wk end 29.12.19.
4. Kantar Worldpanel 52wk end 29.12.19.

past two years⁴.

Much of this growth is being fuelled by the increasing desire for owners to be as careful when feeding and treating their much-loved dogs as they are themselves.

As a result they are looking for trusted brands with treats that don't contain any artificial nasties, and are made with 100% natural ingredients.

Jaggard adds: "Dog owners want to see exactly what they are feeding their dogs, and that's something we really focus on here at Good Boy."

Continued alignment with these overarching humanisation trends is key to Good Boy's future success, striving to meet the increasing expectations of the pet parent.

Jaggard concludes: "Our aim is to continue to grow the category, building on our principles and delighting even more dogs and their owners over the course of this year."



GOOD BOY

“The UK’s most successful petcare brand”

The Grocer, Biggest Brands,
March 2020



**+£12 million sales in
the last 52 weeks**

IRI 52wk ending April 2020

**“A second consecutive
year of phenomenal
growth”**

The Grocer, March 2020

**The UK’s Fastest
Growing dog treat brand**

IRI 52wk ending April 2020

**Delicious dog treats made
with 100% natural meat**

- Lip smackingly tasty
- Wholesome



Discover more at www.GoodBoy.co.uk

BUTCHER'S

NOURISHING FOOD FOR EVERY DOG



DETAILS

Butcher's Nourishing Food For Dogs
Dockham Way
Crick
Northamptonshire
01788 823711
www.butchersdogfood.co.uk

KEY CONTACTS

Rachel Collinson
Director – Food For Dogs
Phil Cotterill
Head of Insight

KEY BRANDS

Butcher's Tripe Mix
Butcher's Puppy Perfect
Butcher's Simply Gentle
Butcher's Lean & Tasty
Butcher's Joints & Coat

SOURCES

1. Kantar, Total Market Spend, Wet Dog Food, 52 w/e 19 April 20 Vs Prior (Nourishing more dogs based on highest penetration of wet dog food brands).
2. IGD, How 2020 Differs to 2008, May 2020.
3. The Economist, Rising Puppy Prices, May 2020.

Providing better food at an affordable price has been Butcher's mission since the brand's beginning in 1987. Today, the brand has a unique category role due to the core belief of giving every dog access to natural nourishing food regardless of what their parents earn. "With our major re-launch last year, our belief in affordable natural food, underpinned by a first to market move away from plastic packaging, has delivered market leading brand growth and 34% of all YOY category growth." Rachel Collinson, director – food for dogs. As a brand, Butcher's now nourishes more dogs than any other wet food brand¹. Our mission also extends to those less fortunate dogs that find themselves in rescue centres, through our #NourishEveryDog brand campaign we have donated more than 1 million free meals to dogs in need across the UK, supporting over 118 charities in their time of need.

BOUYANT IN TRICKY TIMES

2020 has been a turbulent year across all FMCG categories but to date the dog food category has remained relatively buoyant. The delayed impact of Covid-19 however may see the category take a different trajectory later in the year when the full economic ramifications of the Covid-19 crisis come to bear. "Current forecasts point to a deeper dip than in 2008 with

“Our mission also extends to those less fortunate dogs that find themselves in rescue centres”

many households no better financially prepared to cope with a recession². This will put real strain on the household incomes of many dog owners who, as we know from previous recessions, will not sacrifice the welfare of their dogs regardless of personal circumstance” Philip Cotterill, head of insight. As a brand, Butcher's remain committed to helping British dog owners weather the current economic storm and believe our strategic category role of providing naturally nourishing food that is everyday affordable is now more important than ever.

The impact of Covid-19 is not just economic but also social with the likelihood that 2020 will be remembered for the heightened sense of social disconnection and emotional anxiety that was experienced across the globe. It's no surprise that Google searches for “buy a puppy” and “adopt a puppy” rose by +120% and +133% respectively during the early part of the year. During this same period prices for puppies surged as demand outstripped the birth rate of furry newborns³. The world was forced to move all social interaction online, people craved real emotional connection and for many a new member of the family was the way to fill that void. “This is just the start of a trend which will be continued by the rise of homeworking and the evolution of the flexible work/life balance. The impact on the food market will be greater than a simple increase in category penetration as the influx of shoppers with higher levels of emotional engagement will mean greater care and scrutiny over dog nutrition,” says Cotterill.

“There is a risk however that because of the speed in which these social changes have occurred some first-time owners may not have fully considered the responsibilities that come with ownership and the wider industry must work to ensure the general public are as informed as possible prior to making this important decision”



DRIVING CATEGORY GROWTH



Nourishing More Dogs Than Any Other Wet Brand*

Butcher's today is growing at +19% YOY against the wet dog food category currently at +9% YOY (with the brand delivering 34% of all YOY category growth). As a brand, Butcher's now nourishes more dogs than any other wet food brand and its range of health-related sub brands** are growing at more than double the rate of the core brand at +49% YOY.



NATURAL
INGREDIENTS



NO NASTIES



BRITISH &
IRISH FARMED

Butcher's™
NOURISHING
FOOD FOR
DOGS

Source: Kantar, Total Market, 52 w/e 19 April 2020 Vs Prior

* Based on having higher penetration than any other wet food brand

** Butcher's definition: Lean & Tasty, Simply Gentle, Joints and Coat

FOLD HILL FOODS

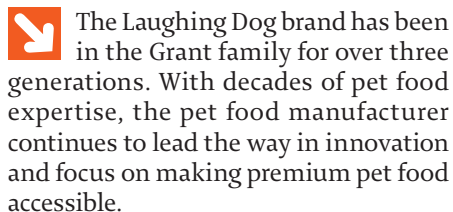
HEALTHY DOG TREATS

**Laughing Dog Food
(Fold Hill Foods Ltd)**

Lade Bank
Old Leake
Boston
PE22 9RJ
0800 098 8057
www.
laughingdogfood.com

Ben Mankertz
Head of Sales

Laughing Dog



Using just five ingredients (including barley from the family's own farm), Laughing Dog's Naturally 5 range of complete meals guarantees balanced nutrition with a clean label – for pet parents to clearly see the health benefits of each carefully selected ingredient. Available in 100% recyclable packaging, the single species recipes are formulated free from artificial additives, sugar, wheat, dairy and soya.

New for this summer is Laughing Dog's healthy treat collection which combines humanised flavours and shapes with clear benefits and natural ingredi-

“New for this summer is Laughing Dog’s healthy treat collection”

ents. The wheat and grain free collection includes Cheesy Bites, Sleep Tight, Fish & Tricks, as well as the brand's first plant-powered vegan treat, Fruity Paws.

Rachel Grant, granddaughter to Fold Hill's founding father, Ted Grant OBE, and member of the sales team, says: "As dog owners ourselves, we scrutinise the food we feed our own pets and passionately believe that access to nourishing and high quality food should not be governed by how much anyone earns. By using many of our own ingredients, grown right here on the family farm, we have complete control over the provenance and sustainability of our brand. We have our own solar panel farm and are proud that our dry food is 100% made in our bakery in Britain. With more NPDP about to launch and new Christmas treats, Laughing Dog is in a great position to see further growth in its sales."

100% British Made on Our Farm



- We are seeing huge growth and now have even more products for dogs to enjoy!
- Featured weekly in the press, we're a REAL family farm, making dog food and treats we are proud to launch.
- No fillers or nasties, just 100% naturally wholesome recipes at AFFORDABLE price points.

W : www.laughingdogfood.com

T : Freephone 0800 0988057



FORTHGLADE

LEADING THE WAY

DETAILS

Forthglade Natural Pet Food

Dartmoor View
Okehampton
Devon, EX20 1GH
Forthglade.com
trade@forthglade.com

KEY CONTACTS

James Kennedy
Sales Director

KEY BRANDS

Forthglade

With awards from leading consumer pet magazines and pet industry trade titles ranging from '2020 Must Stock Product', 'Best Cold Pressed Dry Dog Food' and 'Best Wet Dog Food' Forthglade has become a leader in the UK natural pet food market.

Currently producing 40 million wet meals a year it has rapidly become one of the fastest growing natural wet dog food brands across all trade channels, and fastest growing within grocery retail +75% (supermarkets, Kantar, 52 w/e 3rd Nov, 19). The range includes wet dog food, both complete and complementary options, cold pressed natural dry dog food and wholesome treats.

NATIONAL TRUST LINK

Last summer Forthglade partnered with the National Trust to launch a range of natural nutritious meals and treats for



“Last summer we partnered with the National Trust to launch a range of natural nutritious meals and treats”

dogs, with sales of the co-branded range contributing at least £50,000 to support their work including the Trust's Dogs Welcome Project.

A special gourmet range of complete wet meals was launched, including grain free natural recipes such as duck & venison with green beans and apricots. Soft Bites treats were recently launched, made with natural ingredients, grain-free and hand-baked. James Kennedy, sales director, says: “Our cold pressed dry food is also seeing strong growth, made with all the same principles as our wet recipes, it's really resonating with dog owners who choose to feed dry or mix with our wet foods. We have also seen awareness of our brand grow from 4% in 2016 to 20% in 2020, and this will increase with the ongoing marketing support we have planned, including the successful recent partnership with the National Trust”. ■

Natural the fastest growing Dog Food Category¹

- 50% of mainstream dog food shoppers are looking to move to natural²
- Forthglade, the fastest growing wet dog food brand in supermarkets³



natural
success
story

INSPIRED PET NUTRITION

NATURAL BRAND NOW FOR CATS



DETAILS

Inspired Pet Nutrition

Thirsk
North Yorkshire
YO7 3HE
01845 576 222
customerservice@
ipn.co.uk
www.ipn.co.uk

KEY CONTACTS

James Lawson
Managing Director
Ben Anderson
Sales Director

KEY BRANDS

Harringtons
Wagg

Along with the rise in humanisation of pet food, the desire for natural is also growing. As clean eating and pack interrogation grows within the human world, pet food shoppers are looking for these cues when buying for their pets.

“Harringtons is the brand that shoppers are searching out to fill these needs with its natural positioning and meat first clear protein claim”, says marketing manager Dan Reeves, “we know that natural ingredients and high protein content are important to shoppers”.

With marketing investment for the brand increasing to £6m, across TV and a heavyweight digital focus, Inspired Pet Nutrition (IPN) continues to drive the ‘Natural for All’ message on the Harringtons brand, which has seen it maintain the top ten selling sku’s on a volume basis in the dry dog category.

NATURAL POSITIONING

The success of the natural positioning is not a one-size fits all and Harringtons has crafted solutions for those seeking more specific needs for their pets. These include a Grain Free range and more recently, Just 6 which sees the brand growing in the Limited Ingredient sector.

“Harringtons Just 6 has experienced a strong start in both grocery and pet specialists that really demonstrates how



“Harringtons has crafted a solution to those seeking more specific needs for their pets”

shoppers’ needs are evolving, further illustrated by our Grain Free range being in over 100% growth. Our aim is to meet pet owners’ needs and a key focus will be on the growing sector of Small Dog. This is the area of the dog population that’s growing and where we aim to be really fulfilling pet owner’s needs” says Reeves.

The brand is also enjoying growth in the Wet Dog category, where it is boosting the performance of the plastic tray segment to +25%¹ growth with new pack sizes appealing to consumer needs.

“We’re also seeing natural become more relevant in the Cat category too, and are excited to be re-invigorating the Harringtons brand in this area to satisfy demand for a product that delivers on natural goodness, taste and nutritional benefits.”

Our new Cat range is the biggest launch since Harringtons launched back in 2008 and aims to continue the unrivalled growth. Having recently launched into Asda and Sainsbury’s it has been developed through an in-depth research programme that will bring in new shoppers and add value to the category.

Supported with a clear activation plan to encourage trial, the product itself delivers a nutritionally superior offering with a much higher meat content using fresh chicken than traditional brand leaders.

Elsewhere within the IPN portfolio Wagg Dog Treats continue to bring new shoppers into the category and drive incremental sales. Wagg is the second fastest growing brand in this category, bought by over 1.7 million shoppers.

Lucy Stones, Wagg brand manager: “Our new flavours and shapes in 2020, BBQ Bangers and Steaklets, have really resonated with shoppers and we’re seeing shoppers picking up two packs instead of their usual one. Our future development in this sector will continue to delight shoppers who are looking to treat their friends.”

SOURCE

1 52wk 18 Apr 2020, IRI





Winner Pet Food Category.
Survey of 10,601 people
by Kantar.



HARRINGTONS

THE NATURAL CHOICE

£6M
MEDIA
SPEND

UK'S NO.1 NATURAL BRAND, FOR ALL PETS*

A leading line up with something natural for all



CORE DRY DOG

+8% YoY –
UK's biggest-selling
Dog SKU¹



GRAIN FREE DRY DOG

+100% YoY¹



JUST 6 DRY DOG

First limited ingredient
diet in grocery
Product of the Year
2020



GRAIN FREE WET DOG

+30%
Growth²



CORE DRY CAT



DOG TREATS



Freshly Prepared
and Slow Baked



#THANKYUPETS

At Harringtons, we've recognised the role our pets are playing in keeping us company and helping us stay fit and safe through all of this.

We've donated over 250k meals to help those cats and dogs in most need during this time.

[HARRINGTONSPETFOOD.COM](https://www.harringtonspetfood.com)

* Source: IRI 52wk May 20 | Value Sales | All Outlets 1. Source: IRI 52wk May 20 | Value Sales | All Outlets 2. Source: IRI 52wk May 20 | Value Sales | All Outlets | 400g

LILY'S KITCHEN

PROPER FOOD FOR PETS



DETAILS

Lily's Kitchen

1st Floor
Kings Court
2-16 Goodge Street
London, W1T 2QA
020 7433 1863
hello@lilyskitchen.
co.uk
www.lilyskitchen.co.uk

KEY CONTACTS

David Milner

CEO

Samantha Crossley

Head of Marketing

KEY BRANDS

Lily's Kitchen

Proper food for Pets

↓ Lily's Kitchen is recognised as the creator of the fast-growing premium, natural pet food sector which experienced 12.3% growth in 2019.

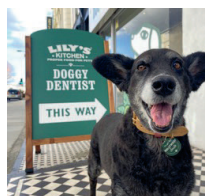
Driven by the mission to deliver proper food to pets, the business offers a range of wet and dry recipes for dogs and cats along with healthy natural treats, as well as fun extras like cookbooks and gifts.

Inspired by the need to create healthier, nutritious pet food, Lily's Kitchen shunned traditional processed ingredients like meat meal or fillers in place of proper meat, fruits and vegetables accompanied by specially selected botanicals and herbs.

The team at Lily's Kitchen also believe that pets are equal members of the family and have spearheaded the humanisation of the category by creating recipes designed to involve cats and dogs in important family moments such as Sunday lunch, birthdays and Christmas.

David Milner, CEO of Lily's Kitchen says, "Lily's Kitchen was founded on the basis of providing healthy, wholesome food for pets.

At the time, not much thought was given to the nutritional value of pet food. Lily's Kitchen disrupted the



“Lily's Kitchen shuns processed ingredients in place of proper meat, fruits and vegetables accompanied by specially selected botanicals and herbs”

category, both by improving the quality of food, and the breadth of options available to pets.”

COMPLETE NUTRITION

The popularity of Lily's Kitchen has been driven by its commitment to only using natural ingredients and developing nutritious complete meals, with many customers reporting visible improvements in their pets' health as a result of switching to its pet food.

Lily's Kitchen was also the first brand to pioneer special occasion meals themed on human dishes, such as roast dinners and birthday meals and was the first brand to create pet-treat advent calendars – something it believes will be more popular than ever for Christmas 2020.

Underpinning all this innovation is a desire to use business as a force for good. Lily's Kitchen was the first pet food brand in the world to become a B Corp, which recognises its ethical and environmental credentials. The company also holds the prestigious honour of having been awarded a Royal Warrant in 2019.

Milner says: “We predict that there will be a real explosion in pet ownership. We've seen this starting to happen through Lockdown and think that as the world's ways of working evolve, people's lifestyles will increasingly allow them to experience the joys of having a pet. From our puppy packs to our mature recipes – we understand modern pet parents and we connect with them through our innovative and disruptive communications. We're the brand that can support them through this wonderful journey that is pet ownership.”

Lily's Kitchen is also continuing its ongoing journey to serve more customers direct through online sales. This includes recently launching an online subscription service so that pet lovers can easily order regular deliveries of their pets favourite recipes ensuring they'll never run out of supplies!



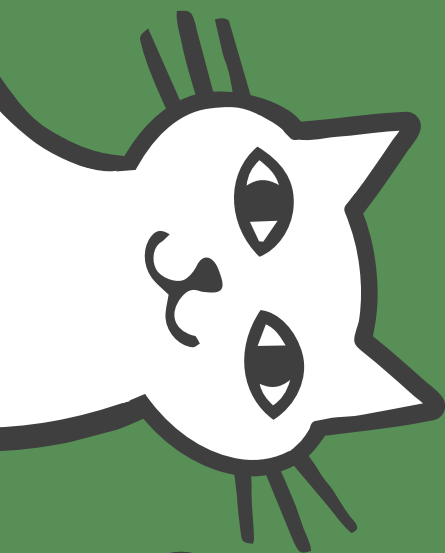
PROPER FOOD for (un)proper PETS

- ✓ NATURAL RECIPES
- ✓ MADE WITH PROPER MEAT
- ✓ NO MEAT MEAL or FILLERS

**No1
BRAND**

IN PREMIUM
NATURAL PET
FOOD

Natural is the fastest growing segment in pet food



PURINA ONE

STAYING AHEAD OF PET NUTRITION



DETAILS

Nestlé Purina (UK)
1 City Place
Gatwick RH6 OPA
www.purina.co.uk

KEY CONTACTS

Vanessa Lessing
Dry Cat Marketing Lead
Vanessa.Lessing@
purina.nestle.com

KEY BRANDS

Purina One

For any pet-food stockist, two trends can't be ignored: the importance of products that help strengthen immunity, and the popularity of formulations specifically for animals aged seven and over. In both these segments, Purina One is leading the way.

As the number one advanced-nutrition dry cat-food brand in grocery and the number two in total dry cat food¹, Purina One is in a strong position to meet the growing demand for these products.

At the Purina Institute, researchers identify new ways to help pets live better, longer lives, and have been instrumental in shaping the science of pet nutrition. And sales show how pet owners value this scientific focus: Purina One is now the fastest-growing dry cat-food brand in grocery², bought by one million shoppers³ who, between them, spend 50% more than the closest competitor, Iams³.

ADDRESSING IMMUNITY

The Purina One Bifensis range is based on a unique nutritional formula, scientifically proven to help strengthen a cat's natural immune system. "We have the experience and knowledge to lead advances in this increasingly important area," explains Vanessa Lessing, dry cat marketing lead. "Having developed products to help support pets' immunity since 2004, Purina One is the brand pet owners trust."

In May 2019, Mintel analysts surveying 2,000 UK pet owners found that 76% believed that looking after pets' digestive health is essential for their general health⁴. "This awareness is likely to have increased, and Purina One Bifensis has been developed to reassure cat-food buyers," continues Lessing. "Its dual-defence formula of beneficial functional bacteria and other nutrients helps support a cat's natural antibody production in the gut, while maintaining a healthy coat and skin."



“Having developed products to help support immunity since 2004, Purina One is the brand pet owners trust”



'So there's a clear message about 'health from the inside out', which more and more pet owners are beginning to understand."

CARING FOR ALL AGES

A key feature of Purina's scientific approach is the ability to develop nutrition for every stage of a pet's life – and with growing awareness of the changing needs of a cat as they mature, senior pet food is a particular growth area. Senior cat food has become a regular item in grocery baskets, and shoppers new to the segment are more valuable to the pet-food category⁵ than others.

Purina spotted this trend early, and recent figures confirm the growth in the market: 42% of cat-food shoppers bought senior products during the last year⁵ and the segment grew by 13.5%, compared with the adult segment, which declined by 0.3%². Meeting this demand, Purina One Senior has seen strong shopper growth of 27% in the last year³, and Purina One overall is now the fastest-growing senior brand in grocery, with growth of 23%².

Lessing explains the brand's strategy for building on this success: "We're going to make the most of our strong position by focusing on our 11+ range extension, which we launched last year. Specifically formulated for cats aged 11 and over, its tailored nutrition supports good health at a time when age-related cell and organ damage can cause progressive weight loss. In particular, vitamins E and C help with cell repair, and the protein-fat balance provides appropriate energy."

With this scientific thinking behind every product, Purina One is set to continue leading the response to emerging trends in pet care. Whether it's the increasing interest in supporting immunity or the growing emphasis on caring for senior pets, Purina One will keep developing the products pet owners value.

SOURCES

1. IRI Market Advantage IRI Outlets + Ocado, Value Sales 52 w/e 25th April 2020.
2. IRI Market Advantage IRI Outlets + Ocado, Value Sales Change vs One Year Ago 52 w/e 25th April 2020.
3. Kantar WorldPanelOnline, 52 w/e 17th May 2020.
4. www.mintel.com/press-centre/retail-press-centre/uk-pet-care-buyers-would-rather-cut-back-spending-on-themselves-than-on-their-pet.
5. Kantar WorldPanelOnline, 52 w/e 26th January 2020.

INTRODUCING PURINA ONE[®] 11+

BROUGHT TO YOU BY THE **FASTEST GROWING**
DRY CAT BRAND IN GROCERY*



LEVERAGE SENIOR, THE **FASTEST GROWING**
SEGMENT IN DRY CAT**, BY **BUYING NOW!**

*Fastest growing Dry Cat brand, Total IRI Outlets + Ocado, Value Sales Change vs Year Ago 52 w/e 29th February 2020.

**Senior, the fastest growing segment in Dry Cat, Total IRI Outlets + Ocado, Value Sales Change vs Year Ago 52 w/e 29th February 2020.

® Reg. Trademark of Société des Produits Nestlé S.A.



Your Pet, Our Passion.®

William Reed
INFORMING BUSINESS GROWTH

WILLIAM REED BUSINESS MEDIA LTD

Broadfield Park, Crawley, West Sussex, RH11 9RT
Tel: 01293 613400 Fax: 01293 610380
www.thegrocer.co.uk