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**The Grocer Guide to...**

**The Grocer**

# Petcare



## Analysis



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# I'm only human...

Treated increasingly as an extension of the family, consumers are keen to see their pets receive the same level of quality in foods that they seek for themselves. And, despite the cost-of-living crisis, they appear reluctant to alter their pet food buying habits



Wagging tails and contented purring are rewarding sights and sounds for pet owners. And, in a financially constrained market, they are not prepared to neglect their furry companions – to the extent that they expect their pets' nutrition to be as good as their own.

However, with the evident cost pressures and inflation across the FMCG market, how are suppliers managing to maintain a high-quality offering that meets the expectations of a relatively demanding clientele – and we're not talking about the pets here.

Forthglade Foods director James Kennedy says that, as with all manufacturers, the company has experienced tremendous input cost price pressures across all of its raw materials, combined with huge rises in utilities. "We've had to pass a proportion of these costs on to our customers, which, as a result, has inflated our value sales performance,"

he says. "That said, with Forthglade's strong credentials, shoppers are comfortable paying that bit more for a brand they trust. Forthglade does also provide great value for money within the natural category, with quality ingredients and high meat content, while positioned at an accessible price."

Inspired Pet Nutrition (IPN) group marketing director Chris Wragg agrees that, like the rest of the market, inflationary pressures, including the cost-of-living crisis and supply chain concerns have meant an unavoidable price rise in the company's products. "However, following repositioning on both our brands (Harringtons and Wagg), we believe they have never been better placed to drive our mission of healthier pets and happier owners, at an affordable price," he says.

Sara Pearson, joint founder of The Hug Pet Food Company points to demographic shifts having an impact on the "huge growth" in the pet food

market. These include an increase in one-person households and young couples planning for delayed parenthood who are treating pets as trainee babies or alternative babies. As the Covid-19 pandemic led to a huge spike in the number of domestic pets, this led to significant new developments in the pet food market, she says.

Chief among these – and a trend anticipated to be the strongest in 2023 – is the humanisation of pet food. "Pet parents are increasingly looking for pet food that mimics human food and is made with human-grade ingredients that consumers recognise," she says. "The Hug Pet Food Company has tapped into this trend by launching the UK's first range of frozen microwaveable ready meals for dogs and cats. HugMyDog and HugMyCat appeal to the new demographic who are frequently urban, first-timers and see their pet as a baby alternative."

On a positive note and looking ahead,

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Zoe Taphouse, category & market activation director at Mars Petcare says the category is forecast to grow by £1bn over the next two years<sup>1</sup>. The grocery multiples still have the biggest share of petcare sales at 49.8%, she says, with wet dog food (multi- and single-serve) and dry dog food both growing ahead of the total category<sup>2</sup>. “Particularly in dog food, we are seeing the growth in the number of buyers as one of the main drivers of the category,” she adds. “As purse strings tighten, people will still want to provide their pets with the food they know and love – and it’s encouraging for the future of petcare that it is one of the last categories in which shoppers say they will look to save money<sup>3</sup>.”

### Snacks and treats

At Forthglade, dog treats are an ever-growing part of the company’s portfolio and have seen growth of 47% year-on-year (YoY), reveals Kennedy. Last year, the company launched a selection of new treats, including its functional soft bits range and plant-based dental sticks, that offer a specific need – such as training, calming or fresh breath – over and above the treating element itself.

He points out that while the cost-of-living crisis continues, shoppers are keen to manage their spend, although pet food remains a resilient category within a recessionary environment. “However, treats could start to come under pressure as more of an impulse purchase,” he says.

Mars Petcare recently expanded its range of treats with the launch of Pedigree Ranchos Lastin’ Layers and Reward Centres, reveals Taphouse. “Recognising that more pet parents are looking for treats that provide their dogs with something to keep them entertained and occupied for longer, the latest additions provide a fun but safe solution when it comes to treating.” The treats are endorsed by the European Veterinary Dental Society, she notes.

### Cost-of-living impact

“So far we’re seeing a split in shopper behaviours across the pet food spectrum,” notes IPN’s Wragg. “Those with a manageable budget are trading up to larger packs to get improved value for money, while those who are struggling are moving into convenience to shop at a lower price point.”



Forthglade’s Kennedy identifies three trends amid the difficult inflationary environment: natural is continuing to outperform the category, indicating that shoppers still want higher quality food for their dogs, despite cost pressures; within the natural category, there is demand for larger packs and these are growing faster than smaller single packs, as shoppers aim to continue feeding high-quality food in the most cost-effective way; and the price increases seen on lower-quality dog food brands demonstrates the gap closing between the cost of standard dog food versus better-quality natural foods – making the financial step up to feeding a natural diet smaller than it has previously been. “Generally, we know that dog food is an area where shoppers are not keen to trade down,” he adds. “There are other categories in grocery they would save money on or choose not to purchase, rather than reducing the quality of their pet’s food.”

Mars Petcare’s Taphouse reckons that for many owners, their cat or dog is a member of the family, and increases to the cost of living aren’t going to prompt them to cut back on the food they know their pet enjoys.

“In the last recession, petcare remained in strong growth as consumers considered it to be an affordable luxury,” she adds. “Fewer shoppers are looking to save money in petcare than almost any other category<sup>4</sup>, with pet owners spending 15% more and buying from more categories than non-pet owners<sup>5</sup>. Of those who will look to save in this area, only 13% said they would spend less money on wet food<sup>6</sup> – a format often considered more luxurious and premium for pets. This demonstrates how shoppers aren’t willing to compromise on quality petcare products, even when looking at where household spending can be cut. It is therefore important for retailers to

# Making the most of merchandising



Retailers are continually revising the way they merchandise pet food, with some doing a much better job than others, notes Forthglade director James Kennedy. Guiding principles he recommends include: stocking the products shoppers want to buy and ensuring those products have ample shelf space to maintain strong availability; and keeping the range interesting, bringing in NPD and disrupting the shopper journey through secondary space to entice shoppers down the pet food aisle. “Treats are an area which could be improved

a lot in terms of functionality, such as dental sticks all placed together and all meaty treats together, rather than brand blocking,” he adds. “This could simplify a complicated fixture, making it easier to navigate, while encouraging trade-up and introducing shoppers to brands they might otherwise not have seen.”

Mars Petcare category & market activation director Zoe Taphouse says the purchase of everyday pet food products tends to be highly planned, with nine out of 10 shoppers planning their purchase<sup>1</sup>. As such, she says, maintaining

availability and ensuring bulk formats are in stores for shoppers looking to stock up is crucial. “Retailers are also perfectly placed to capitalise on the increasing demand for treating,” she adds. “Therefore, it is important for retailers to utilise this opportunity by increasing space for these products. Positioning within stores will also be key to driving excitement among shoppers. Retailers should place new launches at the front of stores or at the end of aisles to increase visibility and raise awareness of their petcare ranges.”

Recently, Spectrum Brands been looking into how customers shop different categories, with dog treats the main focus, reveals head of category & key accounts Andrew Tyres. “For a lot of retailers, merchandising by brand is the obvious choice, but a lot of our research suggests there is an alternative, which allows customers to see the breadth of range within the treating occasion they treat for. We are currently working with retailers to bring them along this journey, and to shape a new approach to merchandising dog treats.”

take advantage of this by ensuring they carry a strong selection of petcare products, including both wet and dry pet food, to maximise sales potential and offer a range of trusted, well-known brands in a variety of formats.”

However, Spectrum Brands head of category & key accounts Andrew Tyres says there is a clear trend that shoppers are prepared to trade down in dog treats to like-for-like formats. “Some brands have seen significant value and volume losses on the back of significant inflation,” he says. “Brands that have tried to protect shoppers from the pressures of inflation, like Good Boy, have continued to win favour with dog treat shoppers.”

In the petcare category, meanwhile, Tyres points to an opportunity arising from the cost-of-living crisis. “As shoppers will be looking to control budgets and visit fewer retail outlets, the opportunity to offer a consolidated shop with everything under one roof

is attractive,” he says. “Brands like IAMS, offering advanced nutrition main meals in grocery at reasonable prices will be sought out by value-conscious shoppers who do not want to compromise on their pets’ diet. As a result, advanced nutrition is the key growth area for main meal in grocery, gaining overall market share (+2.2% in cat dry and +2.3% in dog dry<sup>7</sup>).”

## Sustainable options

One key trend noted in the petcare category is sustainability, says Mars Petcare’s Taphouse. “When we talk about sustainable choices for consumers, we see this as a long-term trend that is set to be far broader than just the product itself or the packaging it arrives in,” she says. “One in three consumers have claimed to have stopped buying certain brands or products because they had ethical or sustainability related concerns about them<sup>8</sup>. In 2023, it is vital that businesses

behave more sustainably in order to offer shoppers brand and products that reflect their own values.”

Apart from its goal of 100% recyclable packaging across the petcare portfolio by 2025, recent activity by Mars includes the Sheba Hope Reef Programme, to protect coral reef restoration in critical regions around the world. Working with local communities, governments university researchers and global NGOs, it aims to restore 185,000m<sup>2</sup> of coral reef by 2029. “Fish is an important ingredient that allows us to provide pet owners with healthy, nutritious and high-quality pet food,” adds Taphouse. “However, sustainable fishing depends on the seas’ resources and this can only be achieved by supporting these incredible natural assets through our Sheba Hope Reef programme.”

Brands are having a stronger focus on sustainability, with more products coming into the market with recyclable

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or reduced plastic packaging, says Spectrum Brands' Tyres. He reveals the company has pursued sustainability with the launch of its Clean & Kind range, with a standout product being its compostable poo bags. "This is helping to reduce the amount of plastic into the market every day," he says. "We are also looking into recyclable or reduced plastic packaging in our food products."

At Forthglade, all the meal trays and cardboard are 100% recyclable with card FSC-certified, reveals Kennedy. "Our treats ranges come in recycled packaging and our dry range will move to recyclable packaging this year." In addition, power at its Devon factory is provided by responsibly sourced biomass electricity, with any excess energy from its production process used to heat offices and staff facilities, he adds. The company also recycles food waste and over 20m litres of water per annum and, this year, is looking to introduce solar panels.

IPN's Wragg says the company has consistently put sustainability at the core of its business, evidenced by it entering its third year as the first major UK pet food business to be carbon-negative. "Our strategy is to leave a positive pawprint in everything we do, across our people, pets and the planet," he says. "The Harringtons brand launched in 2008 in compostable bags and 95% of our packaging is recyclable (we're working on the final 5%). Also, 100% of our energy comes from renewable sources."

The company is also supporting pet charities throughout the UK through its Miles & Meals programme on Strava, with all hours logged adding up to meals for dogs in need. As a result, the company has donated 3.5 million meals to pets in need and its aim is to hit 10 million meals by 2024. "We're also partnering with Forestry England to fund projects to protect forests across the UK, helping with biodiversity and maintaining our pledge to plant 1 million trees," reveals Wragg.

At Hug, the company puts a strong emphasis on sustainable credentials, "such as our 100% British sourced meat and vegetables, as well as recyclable packaging", says Pearson. "Pet owners are becoming more environmentally conscious and are looking for eco-friendly and sustainable options."



### Trends and drivers

Continued demand for advanced nutrition, different dietary requirements and increasingly natural products, as well as more exciting product formats, are all key drivers of NPD, says Purina UK market development organisation director Ben Duncan.

Nutritional awareness will grow as a trend in 2023, agrees IPN's Wragg. "Coming on the back of clean labelling and post-pandemic scrutiny, shoppers want to know that they are providing their pets with the best nutrition they can afford." That's why, he explains, the company's relaunch of Harringtons focused on democratising specialist nutrition, "so that the modern shopper could be confident they are feeding their pets the best food possible".

A high meat content in dry foods and treats, growth of plant-based food and treats and a desire from shoppers to feel confident in understanding what is contained within their pet food

are all trends noted by Forthglade's Kennedy. He says the company sits at the forefront of these trends and is planning a programme of innovation to launch throughout 2023.

People's love for treating their pets and using this as a way to bond was highlighted during the pandemic, says Mars Petcare's Taphouse. "While treats are an additional purchase on top of the regular meals owners will be buying, there is still opportunity to drive sales, even as household budgets may tighten, by offering a range that also provides health benefits," she says. The company recently made its debut into the supplements category with the launch of Pedigree Multivitamins, already available in Tesco, Sainsbury's Asda and Morrisons. "This launch followed findings that showed a gap in the market for dog supplements in chew format. In fact only 10% of the [supplements] category is in a chew, with the majority of the category being

# Selected brand performance

**Nestlé Purina:** Growth has been driven by the Winalot Pouch range – now the No.1 pouch brand in the market, driving +90% of category growth and growing in both value and volume<sup>ii</sup>, says Purina UK market development organisation director Ben Duncan. “Ultimately, Winalot’s position as a trustworthy, no-nonsense brand providing nutritious, tasty food in a convenient format has enabled the brand’s 39% YoY volume sales growth<sup>ii</sup>,” he says. “The brand is now worth £57m.”

**Forthglade:** Volume sales have continued

grow over the past 12 months, albeit at a slower rate than experienced in previous years, says director James Kennedy. “Forthglade has a strong presence across all trading channels, with significant increases in distribution experienced across the year. Our wet food has maintained ‘best seller’ status on Amazon and we continue to see the brand develop both in the grocery and the independent pet trade channels.”

**Inspired Pet Nutrition:** “The Harringtons brand has performed strongly achieving 16% value

growth in dog food, in 2022, which was also mirrored in our Wagg dog brand, up 16%, says Inspired Pet Nutrition marketing director Chris Wragg. “Wagg Treats are proving incredibly resilient in recent months and our Christmas flavour extensions were again hugely successful, demonstrating the expandability of this category.”

In addition, the company reinvigorated the Harringtons Dry Dog range in grocery, refreshing the design to create greater impact on-shelf and including fresh meat ingredients for a high meat content, he says.

**Spectrum Brands:** Spectrum Brands saw Good Boy add over £14m retail sales value in the 52 weeks to 01.10.23, with its main success coming from the growth of its Real Meat treats, reveals Andrew Tyres, head of category & key accounts.

**Mars Petcare:** Zoe Taphouse, category & market activation director reports that the company’s Whiskas core range continues to perform well as pet ownerships stays in growth. Meanwhile, its wider options for cats and dogs from Sheba, Cesar and Crave offer shoppers more premium choices.

perceived as non-palatable.”

She notes that many existing supplements are not incorporated by owners into their dog’s daily diet so Pedigree multivitamins were created for those looking to take a proactive and holistic approach to their dog’s health. “In fact, 55% of pet parents that buy dog supplements also take supplements themselves<sup>10</sup>, demonstrating a clear link between health-conscious owners and the need for more canine supplement options.”

More plant-based or vegan products have been launching into pet over the last year – particularly in dog treats – which will have been driven by the strong trend in human food, says Spectrum Brands’ Tyres. However, the products have not yet seen stellar success within the market, he notes.

That said, humanisation remains a key trend, with more and more shoppers treating their pets as one of the family. “Therefore, natural, healthy,

good for your pet products continue to drive success,” he says.

The US, where the pet food market is estimated to be worth US\$115.5bn<sup>11</sup> is currently leading the way with trends such as better for you products for pets, says Hug’s Pearson. This trend has been mirrored in the UK, with consumers seeking pet foods that offer human-grade ingredients with functional health benefits. The company’s newest addition to its range is a Venison and Blackberries flavour for adult dogs, which Pearson says is packed full of essential protein, vitamins and minerals. She reckons that consumers are likely to pay up to 25% more for better-for-you and sustainable products.

Another significant trend evolving in both the US and UK market is frozen pet food, she adds. This sector has a high CAGR forecast of 6.5% from 2023-2030<sup>12</sup>, driven mainly by the desire for longer shelf-life and the retention of

important ingredients compared to other pet foods.”

Freeze-dried foods are starting to appear in the UK, having launched a couple of years ago in the US, confirms Forthglade’s Kennedy. “The challenge is that it’s very expensive due to the process it needs to go through. Supplements is an area we expect to see further growth in as pet owners continue to invest in supporting the health and happiness of their pets.”

## Sources

<sup>1</sup> Nielsen Panel, L4wk, November 2022

<sup>2</sup> Nielsen, CPS Homescan, Total GB - share of value sales by channel, 16.07.22

<sup>3</sup> Toluna, March 2022 + Streetbees Inflation Tracker, June 2022

<sup>4</sup> Mars Petcare panel

<sup>5</sup> Nielsen, 2021

<sup>6</sup> See 3

<sup>7</sup> Nielsen Scantrack, 52 weeks to 01.01.23

<sup>8</sup> 11 Deloitte, Shifting Sands: are consumers still embracing sustainability?, 2021

<sup>9</sup> Peggy, 2021, Dog parents (441), Dog parents who give supplements (213)

<sup>10</sup> VST Smarter Shelf Test - UK, July 2022

<sup>11</sup> Fortune Business 2022, <https://tinyurl.com/mrvpvyus>

<sup>12</sup> Open PR 2023, <https://tinyurl.com/yeyr9ehj>

## Merchandising

<sup>1</sup> Mars Petcare, based on Shopper Intelligence, 2022

## Sustainability

<sup>ii</sup> IRI, MAT, 52 w/e 04.02.23

## Assisi Pet Care

# Assisi Group enjoys strong growth

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### KEY BRANDS

Hollings Dog Treats  
HiLife  
Pet Munchies

Source  
<sup>1</sup> Company sales out, 52 w/e Jan 2023

 In just 30 months since entering the market, Assisi Pet Care now enjoys revenues in excess of £80m, achieved through both strong organic growth driven by distribution gains, and the acquisition of complementary brands<sup>1</sup>. 2022 was a busy year for the group, which now has a strong presence in both the UK and mainland European markets.

### Brand development

The successful relaunch of the trusted Hollings natural treat brand saw it given a strong cohesive look and feel, along with the introduction of easy-to-shop segmentation. Breaking out from its pet specialist roots and launching into grocery for the first time in its 40-year history, it is now well on its way to becoming a £1m grocery brand<sup>1</sup>.

The award-winning Pet Munchies brand became part of the Assisi Group in July 2022. With its natural ingredients and innovative range, Pet Munchies is



**“2023 is set to be both challenging and exciting for the Assisi Group”**

not only the treat of choice for many dog owners across the UK, but also a perfect fit for Assisi, says CEO Peter Mangion.

2023 is set to be both challenging and exciting for Assisi, he adds. “There are significant opportunities for the continued organic growth of our brands, and for all the products which we bring to the market through our long-standing customer relationships.”



## Pets and people in partnership

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RECIPES TO HELP DOGS THRIVE



**Naturally Active Ingredients To  
Support A Healthy Heart**

**DEVELOPED BY  
NUTRITIONISTS  
VET RECOMMENDED**

\*Source: Kantar Total Market | 52 w/e 22nd January 2023 | Butchers Value Share of Wet Dog Food

**Forthglade Foods**

# A year of exciting product launches

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 Director

**KEY BRANDS**

**Forthglade**  
 – puppies & seniors, grain-free complete meals  
 – Pack of 18s x 395g (single recipes), RRP £1.90 per tray  
 Variety case (two recipes) 12x395g, RRP £22.25  
 – puppies and seniors, wholegrain complete meals  
 – Pack of 18s x 395g (single recipes), RRP £1.90 per tray  
 – Variety case (two recipes) 12x395g, RRP £22.25

With over 50 years’ expertise in making natural meals for dogs, Forthglade remains a trusted brand for high-quality ingredients, no junk or fillers, and wholesome recipes to keep dogs fit and well, says director James Kennedy. Recently named ‘Best Wet Food 2023’ in Your Dog product awards highlights the popularity of the Devon-made dinners for dogs, he notes. This month saw the launch of new tailored recipes for puppies and senior dogs.

The new puppy meals contain 75% high-quality protein, ideal for energetic pups. Grain-free complete meals, suitable for sensitive tummies, include chicken with liver, or a tasty lamb with liver recipe, each combined with sweet potato and vegetables. With ingredients beneficial to brain development, young joints and bones, and healthy digestion, the meals ensure a great start for puppies. Two new wholegrain recipes include chicken or duck combined with oats and vegetables.



**“ This month saw the launch of new tailored recipes for puppies and senior dogs”**

Senior dogs aged 7yrs+ can benefit from recipes with 60% protein and 15% less fat than the adult dog recipes. The grain-free range includes lamb or turkey combined with butternut squash and tasty vegetables. Wholegrain meals with white fish or lamb, plus brown rice and vegetables are available. The senior recipe ingredients target healthy joints and bones, good cognitive function and healthy digestion.



The Natural dog food category is growing ahead of total dog food at +4.9%\*

Forthglade continues to delight shoppers of Natural, winning ‘Best Wet Food 2023’ Your Dog product awards



Source: IRI Major Multiples volume growth 52 w/e 31/12/2022



# The Hug Pet Food Company

## Meals for a new generation of owners

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**KEY BRANDS**

**HugMyDog**  
**HugMyCat**

➔ Hug Ready Meals represents the new generation of pet food propositions, explains Sara Pearson, joint founder of The Hug Pet Food Company. “The unexpected explosion of pet ownership during the last few years has shone a light on traditional pet food choices, which are often not as relevant to the new consumer,” she says. “Certainly, for those who are vegan and vegetarian, there is definite resistance to handling raw meat.”

Sustainably packaged and frozen, Hug is cooked in the microwave direct from the freezer or thawed first and then cooked. The ready meals comprise prime cuts of meat, fish and fowl (minimum meat content: 70% in HugMyDog and 98% in HugMyCat) with only added organic seasonal vegetables and essential vitamins and minerals.

“The Hug range, including dishes specific to adult and senior dogs, puppies, adult cats and kittens, deliver significant nutritional functionality,



“New urban pet owners reference pet food and nutrition against their own habits”

and are easily stored and prepared,” adds Pearson. “The Hug range contains no bone, offal, grain or other fillers – just packed with wholesome goodness.

“Today’s new urban pet owners often reference food and nutrition against their own consumer habits,” she says. “This is why the concept of a premium and convenient ready meal packed full of nutrients is ideal for their lifestyles.”



*HugMyDog and HugMyCat*  
 UK’s first ready meals for pets



*Frozen microwaveable complete meals created particularly for the new urban pet ‘parent’*

*Only prime cuts of meat and organic vegetables. Free from offal, grain, bone and fillers. With added essential vitamins and minerals. All human grade ingredients.*

[www.thehugpetfoodcompany.com](http://www.thehugpetfoodcompany.com) Trade enquiries : [sales@thehugpetfoodcompany.com](mailto:sales@thehugpetfoodcompany.com)

Inspired Pet Nutrition

# Celebrating 100 years

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 Marketing Director

**KEY BRANDS**

Harringtons  
 Wagg

2023 looks set to be a year of celebration for Inspired Pet Nutrition as the company celebrates 100 years of operating and enjoys continued fantastic sales of Harringtons and Wagg brands in the grocery channel, says Chris Wragg, group marketing director. “We’ve seen tremendous growth across our key grocery brands and are proud that Harringtons demonstrates that challenger brands have a rightful place at the table,” he says. “Through continued innovation and investment, Harringtons is more relevant to today’s pet shopper than it has ever been.”

**Natural is key**

In 2022, the Harringtons brand saw its first major relaunch since initial launch in 2008. With market-leading technology, the Dry Dog recipes now contain fresh meat ingredients, making them more naturally nutritious and delicious than ever, says Wragg. “This allows pet shoppers to buy into a specialist-grade proposition in the grocery channel and at an affordable price,” he notes. “With our tiering across the Grain Free and Advanced Science Diet recipes, Harringtons has a meal solution for every dog in the channel and is well-placed for those looking to continue feeding the best nutrition possible in recessionary times.

“We’ll be investing heavily in Harringtons in 2023, across TV, print and digital as well as our social channels, as we look to continue to feed more pets and make great nutrition affordable and accessible to all.”

**Meeting shoppers’ needs**

Shoppers looking to manage budgets and still buy into a trusted brand have been key in boosting sales for the Wagg brand, says Wragg. “Following its ‘Meatier and Mightier’ recipe development, which puts meat as the first ingredient and gives it best-in-class nutrition, shoppers have been picking up bags of affordable food in the grocery channel to see it grow by 13%<sup>1</sup>,” he reveals. “The brand has proved itself to be a champion through previous recessions. But there’s still a role for treating, as pet owners look to add



“Through continued innovation and investment, Harringtons is more relevant to today’s pet shopper than it has ever been”

excitement to everyday feeding and still buy into the affordable category. Wagg Dog Treats’ humanised flavours, such as Bacon Roll, Ham & Cheese Toastie and Steak & Chips, remain affordable and exciting, resulting in 24% growth in the latest year<sup>2</sup>.

**Growth in wet categories**

“Being recognised as Best Wet Dog Food by The Telegraph in January 2023 demonstrates that our brand has appeal,” he adds. “It was noted for its ‘wide choice of wet food’ and ‘simple, specific ingredients’. Also, following a brand refresh, and on the back of a very successful format launch in cans, it’s understandable why we’ve seen such buoyant growth in our wet business.

“Harringtons has also enjoyed strong growth as the brand sweeps into the wet cat arena with a refreshed look,” he says. “As cat owners value the importance of natural ingredients, the brand has had great relevance against a picture of pet food inflation, with shoppers making an affordable trade-up to give their pet the best possible nutrition.”

**Source**  
<sup>1</sup> IRI All Outlets GB – 52w/e 28 Jan, 2023 – Value Sales % Chg – Wagg Dry Dog  
<sup>2</sup> IRI All Outlets GB – 52w/e 28 Jan, 2023 – Value Sales % Chg – Wagg Dog Treats



# HARRINGTONS<sup>®</sup>

THE NATURAL CHOICE

**HARRINGTONS WET FOOD  
VALUE SALES**

**+20.5%  
YEAR ON YEAR\***

**65%  
FRESHLY  
PREPARED  
MEAT  
INGREDIENTS**



**BEST WET DOG FOOD  
AS RECOMMENDED  
BY THE TELEGRAPH**

\* [IRI, TOTAL MARKET GB, 12 W / E 28TH JANUARY 2023]

**Mars Petcare**

# Total health from teeth to tail

**DETAILS**

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**KEY BRANDS**

- Pedigree®**
- Dentastix™
  - Dentastix™ Chewy Chunks™
  - Multivitamins
  - Ranchos™
  - Tasty Minis
  - Biscrok™
  - Jumbone™
  - Markies™
  - Mixer™
  - Puppy Dentatubos™
  - Rodeo™
  - Rodeo™ Duos
  - Schmackos™
  - Tender Goodness™

↙ A trend within petcare that is here to stay is people's love for treating their pet, says Zoe Taphouse, category & market activation director at Mars Petcare. "While treats are an additional purchase on top of the regular meals owners buy, there is still opportunity to drive sales by offering a range that also provides additional health benefits," she says.

With four out of five dogs suffering from gum disease<sup>1</sup>, oral health is an important area for owners and brands to focus on, notes Taphouse. "To help bolster innovation within the category, our Pedigree brand recently made its debut into supplements through the launch of Pedigree multivitamins. Now available in Tesco, Sainsbury's, Asda and Morrisons, Pedigree multivitamins cater to pet parents who are looking to take more proactive care of their dog's health, and will help to attract new consumers into the category through their accessible format.

"What's more, recent findings have shown that only 10% of the category is currently in chew format<sup>2</sup>, with the majority of the category being perceived as not palatable," she adds. "Pedigree multivitamins are easy to dose since they come in a soft chew format, and are made with 100% natural chicken. Each supplement contains at least eight vitamins and has been developed by the Waltham Petcare Science Institute alongside vets and pet nutritionists, to create a tasty chew that supports a dog's immunity, joints, and digestion."

**Market update**

Despite the current economic challenges, the petcare category remains resilient, reveals Taphouse. "The grocery multiples still have the



**“To help bolster innovation within the category, our Pedigree brand recently made its debut into supplements through the launch of Pedigree multivitamins”**

biggest share of petcare sales at 49.8%<sup>3</sup>, and as purse strings tighten, people will still want to provide their pets with the food they know and love, with petcare being one of the last categories in which shoppers say they will look to save money on<sup>4</sup>,” she notes. “This is good news for petcare and retailers alike, and across our product portfolio we are seeing steady growth. For example, our Whiskas core range continues to perform well, while our wider options for cats and dogs from Sheba, Cesar and Crave offer shoppers more premium choices. For cost-conscious shoppers, our Pedigree Dentastix range helps to keep treating relevant.”

**EVDS accreditation**

In the coming months, Mars Petcare will be rolling out its EVDS (European Veterinary Dental Society) endorsement across its portfolio to reduce the risk of tooth fractures in dogs, she adds. “This is an accreditation we now have across two of our recent launches; Pedigree Ranchos Lastin’ Layers and Reward Centres and Crave Meaty Rolls. Recognising that more pet parents are looking for treats that provide their dogs with something to keep them occupied for longer, the latest additions provide a fun, but safe, solution when it comes to treating.

“We want all chews to help benefit dogs’ oral health, and rolling the endorsement out widely will help us to further our mission of supporting a dog’s total health from teeth to tail.”



**Source**

<sup>1</sup> Euromonitor, 2018  
<sup>2</sup> Peggy, 2021, Dog parents (441), Dog parents who give supplements (213)  
<sup>3</sup> Nielsen CPS Homescan, Total GB – share of value sales by channel, 16.07.22  
<sup>4</sup> Toluna March 2022 + Streetbees Inflation Tracker, June 2022



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**NEW**  
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Pedigree was the largest dog food brand in the UK in 2022 (£172m), Nielsen RMS GB Total Coverage Value Sales L52W w/e 31.12.22

**Nestlé Purina PetCare**

# Tailoring to specific needs

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**KEY BRANDS**

**Winalot**

➔ Nestlé Purina has launched exciting innovations in 2022 tailored to specific needs, reveals Winalot brand manager Hannah Debson. These include its Winalot Small Dog range, made with natural ingredients, which has tasty, bite-sized pieces to improve digestion, catering to a growing small dog ownership in the UK, she says.

“We have also launched nutritionally-tailored products for puppies and older dogs aged 7+ , to keep everyone’s dogs happy and healthy at any age,” adds Debson. “Winalot delivers tasty, affordable nutrition, sitting at the right price to appeal to a mass audience of dog lovers who resonate with the brand’s trustworthy, no-nonsense approach. Winalot is in a unique position as a UK heritage brand, modernising through a convenient and easy-to-use format that consumers love.”

Winalot’s pouch sales have driven +90% of category growth<sup>1</sup> and are growing in both value and volume, explains Debson. “The brand is now worth £57m, rising by 64% YOY<sup>2</sup> And this growth is driven by volume increases as well as value,” she says. “There is opportunity for the brand to grow and maintain momentum as the UK’s No.1 dog pouch brand<sup>3</sup>.”

**Heroing Great British Dog stories**

Nestlé’s partnership with Immediate Media on the ‘Great British Dogs’ campaign is now in its fourth year, notes Debson. “This drives brand love with consumers by celebrating the relatable, heart-warming, everyday greatness



“ We have launched nutritionally-tailored products for puppies and older dogs aged 7+ to keep everyone’s dogs happy and healthy at any age”

of British Dogs,” she says. “This year we have some exciting developments including a charity partnership, in-person presence at BBC Good Food/ BBC Gardener’s World show in June and the opportunity for consumers to vote on their favourite stories at the end of the year. Winalot is proud to hero Great British Dog stories year-round.

“We’re also planning some shopper activity in-store later this year, to support our Small Dog range in the year following launch. So, stay tuned to see our products come to life on-shelf.”

**Longer-term trends**

Humanisation of pet food is a long-term trend that we only see growing in importance over the next few years, says Debson. “The success of our Small Dog Range and Sunday Dinners products are proof that mirroring real human behaviour in petfood is a winning strategy that truly reflects how our pets are part of our family.”

Continued demand for more natural products also continues to grow, she adds. “Winalot’s pouch range is made with natural ingredients and caters to pet owners who want a natural food offering at an affordable price, without compromising on taste.”



Source  
<sup>1,2,3</sup>IRI, MAT 52 w/e 04.02.23



# Grow your category with the UK's number 1\* dog pouch brand!



 made with **NATURAL** INGREDIENTS\*\*

\* IRI Market Advantage, IRI UK All Outlets, Value Sales, Wet Dog Food Pouch 52 w/e 21 January 2023. \*\* Ingredients of natural origin.

**Spectrum Brands EMEA UK**

# Good Boy: a brand to watch

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**KEY BRANDS**

**Good Boy**  
 – Clean & Kind  
 Compostable Poo Bags  
 – Real Meat – Chicken  
 Strips & Beef Strips  
 – Chewables

Good Boy remains the UK’s No.1 dog treat brand, growing three times faster than the nearest competitor in the latest 52 weeks, adding over £14m in retail sales value<sup>1</sup>, says Andrew Tyres, head of category & key accounts at Spectrum Brands. “Despite the cost-of-living crisis, Good Boy shoppers have continued to buy into the premium Real Meat treats, with volume growth still positive, up 1%<sup>2</sup>,” he says. “This growth is hugely attributed to Good Boy’s success in innovating new formats and flavours into our best-sellers.

“Good Boy’s main success has come from the growth of our Real Meat treats, with this sub-category now the second-largest within dog treats<sup>3</sup>. It encompasses many different treating occasions, but as a premium, natural alternative to other treats on the market. Variety has been a key pillar of success within Good Boy Real Meat, as innovating new formats and flavours into our best-sellers has driven incremental growth.”

**Good Boy NPD**

Good Boy’s Clean & Kind range offers shoppers a plant-based alternative, notes Tyres. “Our standout product within this range is our green compostable poo bags,” he says. “They are also biodegradable and designed with handy handles for easy use. These poo bags help to care for our planet by reducing plastic. They are available in rolls or as bags to suit all consumers.”



“Variety has been a key pillar of success for Good Boy, as innovating new formats and flavours into our best-sellers has driven incremental growth”

Meeting the demand for bulk purchasing, Good Boy has launched more pack sizes of its 100% natural meat fillets range, he reveals. “These are not only lip-smackingly tasty but also low in fat. This loved format is popular for being either fed as an occupying treat or snapped into smaller training bites.

“Our newest launch in Asda is Good Boy Chewables – a super tasty Chewables treat providing a healthy alternative to traditional rawhide.”

**Targeting treating occasions**

Alongside this innovation, the company is targeting other treating occasions, using consumer insight to highlight key areas of growth opportunity, where it can innovate new products to fulfil consumer needs and grow the Good Boy brand.

“Examples of these innovations would be our Chompers, Crunchies, Superlicious and Tough & Tasty ranges – all targeting different occasions and bringing further breadth to the dog treat market,” says Tyres. “We are always analysing data and insight to continue to innovate great products for our pets.

“Good Boy is a brand to watch, with more new innovative treats for 2023,” he concludes.



Source  
<sup>1,2,3</sup> Nielsen Scantrack, 52 weeks to 01.01.23

# GOOD BOY

# UK's No.1 Dog Treat Brand\*



**+£14.3 million sales in 2022\***

**Growing 3x faster than the nearest competitor\***

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\*Nielsen 52 WE 31 December 2022

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