

Petcare



HEALTHY HEART
TO HELP YOUR DOG THRIVE

THE MOST SUCCESSFUL NEW PRODUCT LAUNCH IN THE DOG CATEGORY 2023*



VOTED PRODUCT OF THE YEAR 2024

*Source: Circana Major Multiples, Total Dog Food (Dry, wet and treats), Value and Volume, 52 w/e Dec 2nd 2023.
Healthy Heart - Winner Dog Food Category Survey of 8000 people by Kantar



Butcher's Nourishing Food for Dogs

Nourish every dog

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KEY BRANDS

Butcher's Nourishing Food for Dogs
 – Tripe
 – Puppy Perfect
 – Simply Gentle
 – Lean & Tasty
 – Joint & Coat
 – Healthy Heart
 – Recovery & Revive

Amid a challenging cost-of-living crisis, where the pet category saw an overall volume decline of -6% last year¹, Butcher's stands resilient, growing volume sales year-on-year², reveals head of insight Phil Cotterill. "The brand's commitment to providing affordable, naturally nourishing food has been crucial to sustaining this growth, particularly in the wet dog food sub-category, which has experienced an -8% volume decline³," he notes. "The adverse impact of inflation in the category is evident, with prices for many brands soaring beyond what shoppers are willing to pay for them."

"Butcher's unwavering dedication to offering quality, natural, nutrition at accessible prices has not only weathered the storm but also maintained its long-term growth trajectory following a pivotal brand repositioning in 2019," says Rachel Collinson, director – food for dogs.

The most successful NPD of 2023

Even in the midst of an economic downturn, Butcher's continues to shine with its Natural Health Support range which has gone from strength to strength, notes Cotterill. Within this range, Butcher's has introduced the groundbreaking product, Healthy Heart. "Butcher's Healthy Heart is the fourth addition to the Natural Health Support range which helps owners tackle some of the most common health concerns facing their dog," he says. "In its first year, Healthy Heart has been a hit with dog owners and is now worth £7m annually⁴, making it the most



“In its first year, Butcher's Healthy Heart has been a hit with dog owners and is now worth £7m annually⁴”

successful new launch of 2023 across the entire dog category⁵. Healthy Heart outperformed all other new product launches in value and volume⁶.”

“Additionally, Healthy Heart was awarded the prestigious ‘New Product Of The Year’ award in the Consumer Survey Of Product Innovation in 2024, voted for by 8,000 shoppers each year,” reveals senior brand manager Natasha Bryant.

Sustainability milestone

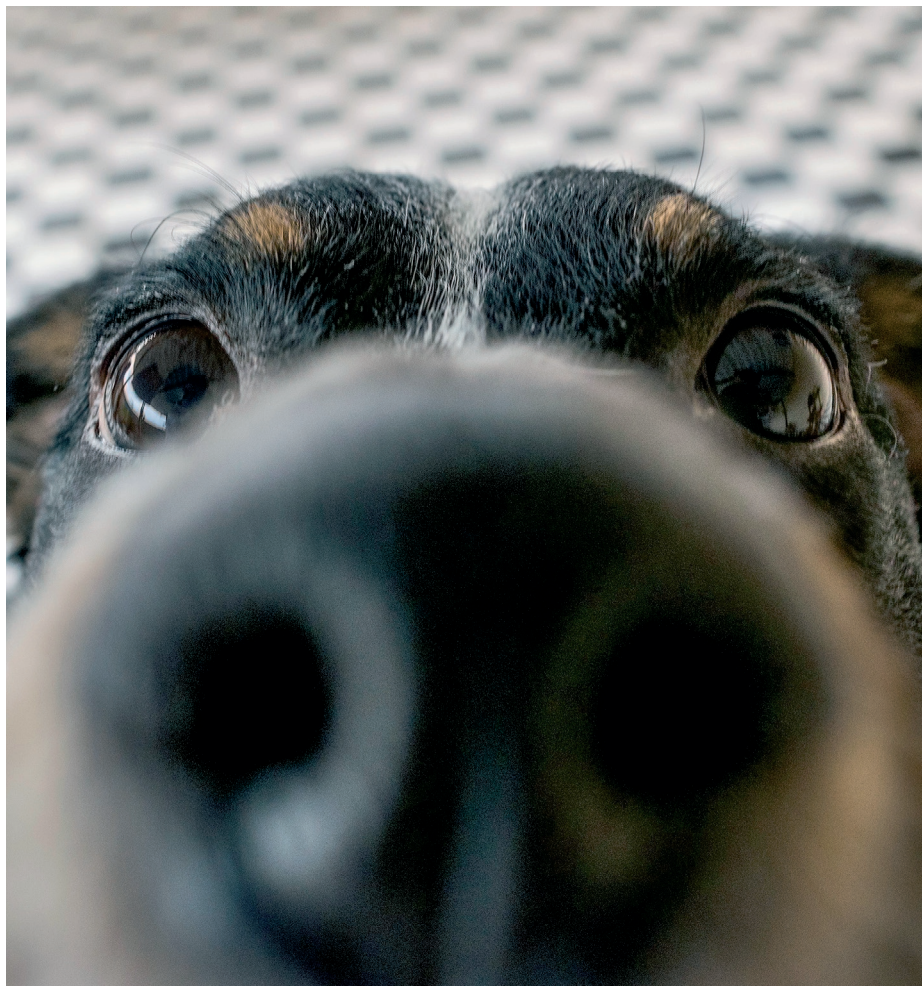
Beyond nutrition, Butcher's takes pride in minimising the environmental impact of the brand and the business. This year marks a significant five-year milestone since the brand became the first in the category to eliminate plastic packaging from its can multipacks.

“The decision to remove plastic shrink-wrap from can multipacks exemplified Butcher's steadfast commitment to a greener future,” says Collinson. “As the business reflects on this milestone, it's fantastic to see other brands recognising the importance and taking similar steps to eliminate plastic packaging. This collective effort reinforces the belief that small changes can lead to significant positive impacts not just for dog owners but society as whole.”



Source

¹ Circana Major Multiples, Total Pet & Total Wet Dog, Volume, 52 w/e 02.12.23
² Butcher's Consolidated EPOS, Total Market, Volume Sales, 52 w/e 02.02.23
³ See 1
⁴ See 2
⁵ Circana Major Multiples, Total Dog Food (Dry, wet and treats), Value and Volume, 52 w/e 02.12.23

Analysis

From fur to feathers

Traditionally a resilient category, even petcare has suffered from the inflationary environment

Despite all of the financial hardships encountered during the past year, British consumers continue to harbour a love of their pet friends, with dogs, cats, rabbits, indoor birds and guinea pigs topping the list of the UK's pet population in 2023¹.

Yet the pressures in the market have come to bear, with 13% (3.7m) of households admitting to having relinquished a pet in 2022, and the figure rising to 28% among young owners (aged 16-24)², according to UK Pet Food. Although the statistics might suggest market despondency, the importance of pets and wildlife to mental wellness is recognised, with the numbers showing that over 50% of

owners feel pets support their mental wellbeing³.

While the pet category has been historically resilient in economic downturns, it has not been immune during the recent cost-of-living crisis, with a -6% decline in overall volume in the last year⁴, says Butcher's head of insight Phil Cotterill. "The wet dog food sub-category, particularly affected by inflation, has seen a -8% volume decrease⁵ as prices for many brands rose beyond what shoppers were willing to pay for them," he says. "Despite this category backdrop, Butcher's... affordable, natural, nutritionally rich products resulted in strong volume sales growth in the last year⁶.

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Analysis

The average £/kg price in the total pet category has risen by 35% over the past two years, with the principal category of wet dog impacted disproportionately by rising costs, driving prices up by 50% at fixture⁷, adds Cotterill. “Every input cost has seen inflation and, like every brand, Butcher’s has had to pass on some of this inflation.” The company says it has focused on operational efficiency in order to maintain high standards of food quality.

Natural dog food continues to outperform versus total category and shoppers are increasingly looking for nutrition tailored to the needs of their dogs, such as age-specific diets, says Forthglade Foods sales director James Kennedy. To meet this demand, the company launched its Lifestage range at the beginning of last year. “We are also seeing a growth in supplements which resulted in the launch of our Salmon Oil, which is performing extremely well,” he adds.

An increasing average price has contributed to much of the value growth in petcare, agrees Pets Choice head of marketing Lisa Melvin, who cites a 9% rise year on year (YoY) at £290m and the category’s grocery sector now valued at £3.4bn⁸. Although household penetration moved from 52.6% to 53.2%, the sales volume declined by -5% YoY in 2023⁹, she says. The company’s largest brand remains Webbox, with food and treat sales worth over £95m¹⁰. Webbox Cat Treats remain the star in its portfolio, with sales value up 15%¹¹ in the last year, as shoppers love the formats, flavours and value. Meanwhile, its litter & hygiene brand, Felight, now has sales of over £10m annually, almost doubling YoY¹².

The petcare category continues to be a growth driver for fmcg, says Mars Petcare category & market activation director Adelina Bizoi. “While no category across fmcg is fully recession-proof and shoppers are still tightening their purse strings, it is clear that pet parents want to give their furry companions high-quality, nutritious products that they know they can rely on. Even during challenging times, they continue to seek out both quality and value for money from trusted brands.

“This has provided retailers with the opportunity to strategically align with this trend,” she notes. “Consumers tend to think carefully before they

compromise on quality petcare products and are continuing to spend money on discretionary areas such as treats, despite the impact from the cost of living. Therefore, retailers can position themselves a providers of both best-sellers and premium products to attract both their usual customer base and those shoppers willing to invest in premium choices.”

Feeding the birds

Today’s climate is very tough and consumer expenditure is tight, but around 50% of the public buy into the wild bird feed category¹³, attracting a variety of colourful birds to gardens across the country, says Rachael McWilliam, head of brand & category at wild bird food supplier Peckish. “Almost £1 in every £5 spent in the category is being spent on Peckish¹⁴,” she says. “Consumers choose to trade up into branded goods when they see the benefits and, with Peckish,

we know that consumers appreciate that our brand produces quality wild bird food. As such we have a very committed affluent audience.”

GfK figures suggest that ready-to-use feeders are gaining popularity¹⁵, she adds. “Peckish filled feeders have a 60% share of the market¹⁶,” she says. “Ready to use feeders are strong impulse sales drivers, often purchased by consumers who are new to the wild bird feeding category and who are looking for simple solutions.”

Pet food shopper behaviours

While natural dog food shoppers are reluctant to change their dog’s diet and are staying loyal to the brands they use, they are increasingly shopping around to obtain the best price, which is often driven through promotional activity, with a noticeable shift to online retailers where shoppers can more easily purchase in bulk, says Forthglade’s Kennedy.



Treats continue to thrive

94% of dog owners and 79% of cat owners buy treats for their petsⁱ, and over 70% feed treats every dayⁱⁱ, says Mars Petcare's Bizoi. This supports the notion that petcare is one of the last categories in which shoppers say they will look to save moneyⁱⁱⁱ, she adds.

While the total treats category in grocery is in decline (-4.5%)^{iv}, natural treats is in growth (+1.2%)^v, reports Kennedy, with Forthglade's treats outperforming the natural category (+12.8%)^{vi} as the brand benefited from increases in distribution coupled with an extensive

program of NPD launches across its soft bite and new meaty treat ranges last year. "We're noticing a continued move towards treats that support dogs' health and wellbeing as pet owners become increasingly conscious of what they are feeding their dogs, seeking fewer but higher-quality treats."

Pets Choice's Melvin says she continues to see strong demand in cat treats, valued at £240m annually and growing 14% year on year^{vii}, with volume also moving up, which indicated not just price-led value growth, it says. "We've seen more shoppers enter the fixture

(penetration +3% YoY^{viii}) and continued high frequency with shoppers buying 15 times throughout the year^{ix}. Quality and palatability are paramount in cat treats and we continue to see strong growth in liquid-based treats," it adds. "Webbox Lick-e-Lix is driving our strong cat treat growth at 16% YoY^x, securing six of the top 10 fastest-selling treats in the market as well as the UK's No.1 cat treat product^{xi}."

Meanwhile, dog treats are extremely competitive but a key market to play in as they are adopted by almost all dog owners and remain important for treating

and rewarding, it adds. "They also continue to be important to stores, with sales a whopping £650m annually^{xii}. Dog treats grew at a slightly slower rate (+10% YoY), with volumes broadly static in the last year (-1% YoY)^{xiii}."

Spectrum Brands, which owns the Good Boy range of dog treats, says the treat market has grown in value although it has seen a slight decline in volume. "For Good Boy we have been able to remain in growth for the majority of the year, although from a volume perspective, this has been a challenge as customers have tightened spending due to wider macro pressures."

Pet parents are shopping for their pets in more channels than ever before, agrees Mars Petcare's Bizoi. "This includes grocery, discounters and specialist pet trade, with the average UK pet shopper buying across three different channels to bring together their pet's feeding regime¹⁷. It is therefore critical that retailers optimise their range to offer the best brands across a variety of categories to satisfy shoppers in-store."

With many dog owners finding themselves forced to reassess their spending, the dog category has seen a negative impact on average volume purchased, says Butcher's Cotterill. "The decline is primarily driven by falling shopper frequency, with shoppers – often unconsciously – opting to buy less volume overall. Purchased food is being stretched further and many are supplementing their dog's diet with home-cooked alternatives, which is driving down category volume."

"The challenge for the category is to remind shoppers of the additional health benefits prepared pet food can have on their dog's wellbeing to give them a reason to keep returning to the fixture," he adds. To address this, Butcher's nutritionists developed Butcher's Healthy Heart at the beginning of 2023, an "affordable meal solution designed to support natural heart function", it says. "This is a great example of how maintaining a focus on emerging shopper needs can continue to drive incremental sales, even during challenging times."

Shoppers in different circumstances obviously have different reactions to inflation, says Purina Petcare. "Some shoppers, who continue to have the space and resources, defer to larger pack sizes because of the increased kg per pound they offer. Others prefer smaller packs that take less space to store, require less expenditure per purchase, and reduce the risk of

wastage should pets change their eating habits midway through usage. In terms of broad trends, we have seen a slow-down in the relative growth of non-manufactured pet food since the pandemic¹⁸, potentially indicating shoppers are deferring more to manufactured food because of the convenience and cost benefit it offers over food cooked from scratch. Furthermore, we see shoppers continuing to prioritise their pets, as the average percentage of shopper spend that goes on them remains the same (2.21%) as it was a year ago¹⁹."

Spectrum Brands has noted a trend towards bulk pack spending, particularly in dog dry, where unit sales have declined but overall tonnage sales have continued to increase, as have RSV sales. "This points to a trend that shoppers have chosen to invest in bigger packs to save money in the long term," says the company.

"Within main meal dry food, there

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has been a visible trend for shoppers looking to reduce spend but seeking out brands that can offer similar benefits to the higher-priced foods they were originally purchasing,” adds Spectrum. “For example, IAMS has been a credible alternative for shoppers who historically purchased advanced nutrition food in specialist outlets.”

Shoppers remain sensitive to price changes and we must expect that to continue, says Melvin at Pets Choice. That said, brands remain hugely important to petcare, delivering over 80% of sales revenue²⁰, she notes. “It’s clear shoppers continue to back brands they know and trust, with overall branded sales growing ahead of private labels in the last year,” she adds. “But this doesn’t tell the whole story. In fact, three of the four top petcare brands grew at a much slower pace than the market and lost share overall – signalling evolving demands from the pet fixture, where shoppers look for alternatives to add to their repertoire.”

In-store merchandising

When it comes to merchandising petcare products in-store, Spectrum Brands says market indications show that an increase in shopper navigation and education are key to growing the category within grocery.

Indeed, awareness is critical for the success of any brand, says Forthglade’s Kennedy, who adds that, as brand owners, the company looks to engage shoppers in areas that are important to them, in order to inspire and educate them. “We also work with industry experts, such as media vet Dr James Greenwood, to provide helpful advice for dog owners and focus on creating content that promotes a strong connection with dogs,” he says.

At Pets Choice, the company has increased its spend in shopper and consumer communications to drive brand awareness and product trial initiatives, reveals Melvin. “Off-shelf also remains key to help attract and disrupt shoppers on auto-pilot missions and on-shelf availability and standout must remain central to all activity to ensure shoppers can easily find what they are looking for, quickly,” she says.

“Signage in-store and across fixtures can be a great way to signal the category,” says Mars Petcare’s Bizoi. “We recommend using clear messaging



to allow shoppers to navigate the fixture and find the products they are looking for efficiently.”

Positioning within stores will also be key to driving awareness of new products, she adds. “Retailers should place new launches at the front of stores or end of aisles to increase visibility of their overall petcare range.”

For many consumers, bird food is an impulse buy, reveals Peckish’s McWilliam. “So we encourage retailers to offer a high level of visibility to consumers to increase the propensity to buy. According to GfK, the market size for bird food is currently sitting at £340m²¹ and since grocers have increased their shelf space, they have increasingly gained share since 2019. In 2023, the value has grown by over 6% YoY²², which demonstrates the opportunity available in this sector, but it is certainly led by consumers seeing products in-store and manufacturers doing their part to raise awareness of

the category.”

Sustainability

For Peckish, sustainability is at the heart of the business, reveals McWilliam. Five years ago, the company embarked on its ‘Field to Beak’ strategy to find innovative ways of making its products more sustainable and supportive of nature. “The wild bird feeding category is synonymous with nature and therefore, all aspects of a product, including packaging, must support nature and have a positive impact on the environment,” she says. “Sustainable packaging is a clear priority for consumers, yet there’s still much confusion over what type of plastic can be recycled. However, consumers intuitively understand that they can recycle paper and cardboard at home from the kerbside. This has led us to transition our plastic packaging to paper on some of our most popular



Healthy outlook

In recent years, there has been a discernible shift in the dog food industry as pet owners increasingly prioritise not only natural ingredients but also the functional benefits they can provide for their pets' health, says Butcher's Cotterill. "Beyond simply seeking products free from artificial additives and preservatives, consumers are now more interested in understanding the specific nutritional advantages that natural ingredients can offer to enhance their dogs' overall wellbeing," he says. "This evolving trend reflects a growing awareness among

pet owners about the potential positive impact of functional ingredients, such as antioxidants, omega-3 fatty acids and probiotics on various aspects of dog health, including immune function, joint health and digestion." In response, Butcher's expanded its Natural Health Support range last year with the launch of Butcher's Healthy Heart, containing plant-based omega-3, taurine and L-Carnitine and vitamins C and E to support heart muscle function. By the end of the year, this had grown to become a £7m brand^{xiv}, marking it as the most successful NPD of the

year across the entire dog category^{xv}.

More and more pet parents are looking for proactive ways in which they can take care of their pets' health^{xvi}, says Mars Petcare's Bizoi. "The supplements category is already worth £126m in the UK^{xvii}, but we saw room for growth," she says. "Last year we launched Pedigree Multivitamins, which are scientifically proven to support dog health and vitality. This followed findings that showed a gap in the market for dog supplements in a soft chew format that are easy to give to dogs. In fact, only 10%^{xviii} of supplements were available in

a convenient chew format at the time of launch."

Pet health & wellbeing remain a priority for owners and Pets Choice healthcare brand Bob Martin continued to grow last year, accounting for broadly 60% of grocery healthcare sales revenue and a higher share of units sold^{xix}, says Melvin.

At Spectrum Brands, the company has observed a trend towards products such as supplements, and salmon oil, which have historically only been found in specialist pet retailers, it says. "However, with their increase in popularity, these are now moving into grocery," it notes.

product lines and make it easier for consumers to conveniently recycle our packaging without having to go out of their way.

"Our sustainability strategy also considered 'food miles' and the distance our products travel at every stage of their lifespan. Now, much of our bird seed is locally sourced from farmers within a 30-mile radius from our factory in East Yorkshire, ensuring we keep the mile our products travel as few as possible."

Sustainability remains a key trend in petcare, says Mars Petcare's Bizoi. "When we talk about sustainable choices, for consumers, we see this as a long-term trend that is far broader than just the product itself of the packaging it arrives in. It's vital that businesses behave more sustainably in order to offer shoppers brands and products that reflect their own values."

At Mars Petcare, the Sheba cat food brand launched the Sheba Hope Reef

restoration initiative in 2021, to work on one of the world's largest repaired coral reefs, located off the coast of Sulawesi in Indonesia. "Since the coral restoration began in 2019 – the start of a global movement to restore coral reefs around the world – coral growth has increased from 2% to 70%, fish populations have increased by 260% and there has been a 64% rise in the number of fish species," reveals Borzoi.

Forthglade's Kennedy says that, despite the cost-of-living crisis, sustainability is still important to pet owners. The company's meal trays and cardboard are 100% recyclable with card FSC-certified. "We'll be rolling this out across our cold-pressed dry range in 2024," he reveals. In addition, Forthglade's factory in Devon is powered by sustainably sourced electricity. "And we are constantly looking at ways to reduce the energy required to produce our food, including reducing mileage by 11,000 miles/year

from our distribution network," he adds. "We have invested in improved processing to reduce food waste by over 50% in the past year and we will be installing a solar array in 2024, which will supply around 25% of our electricity demand."

At Pets Choice, the demand for natural and sustainable petcare products inspired the creation of its Felight Cat Litter brand, reveals Melvin. Last year, the company launched Felight Natural Wheat Pellets as a replacement for traditional wood litters and found that this 100% wheat alternative outperformed wood by absorbing quadruple its own weight in liquid, says the company.

This November Butcher's will celebrate five years since taking the "category-leading" initiative to remove plastic shrink-wrap from its can multipacks and replace with recyclable cardboard, says Cotterill. "We have also been delighted to see other brands

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make similar changes in the last year, meaning pet parents now have more sustainable options in the pet aisle than ever before,” he says.

“Sustainability has been talked about a lot in the market, specifically retailer-focused strategies around it,” says Spectrum Brands. “However, from various research and products that have launched in the market, there isn’t a clear trend showing that lack of sustainability in a product is deterring shopper purchase. While it is desirable to shoppers for packaging to become more sustainable, current evidence suggests that shoppers are not willing to pay more for this, or switch from a brand they currently purchase in favour of one that is more sustainable.” That said, the company’s Good Boy brand launched its Clean & Kind range of compostable poo bags and pet wipes into the market this year, which are working well, it adds.

Looking ahead

In the wild bird feeding category, sustainable packaging is of high importance to shoppers and Peckish’s McWilliam expects to see more and more consumers demanding environmentally friendly packaging. She also anticipates that locally sourced items will be in higher demand and the company’s latest innovation uses UK harvest waste to create a shell that looks very similar to the popular wild bird suet feeders. “Yet our product isn’t shipped across the world, doesn’t use plastic and biodegrades in just 12 weeks,” she says.

For Spectrum Brands, 2024 will see a level of deflation appear as grocers move to regain volume losses from the last year, it says. Other trends include towards premium and natural products, as shoppers continue to view their pets more and more as a member of the family. Meanwhile, brands will continue to move towards more sustainable packaging, it adds.

For Pets Choice the three main trends that have governed the market in 2023 – humanisation, natural wellbeing and affordable sustainability – will continue to be those that drive growth in 2024, says Melvin. “Shoppers still seek choice, and humanisation continues to provide incremental purchase opportunities and category growth drivers,” she notes. Meanwhile, increased



awareness, knowledge and sales of pet health, hygiene and grooming products continue to drive growth, as do natural life-stage ranges, which help pet owners to tailor purchases to their pets’ individual needs.

Forthglade’s Kennedy anticipates that the preference for a natural diet, alongside the health and wellbeing trend will continue throughout 2024 as pet owners become increasingly conscious of what they’re feeding their dogs, seeking a high-quality, natural diet and treats at a competitive price.

Mars Petcare’s Bizoi anticipates trends such as health and supplements continuing to grow in momentum as more consumers take a proactive approach to their pets’ health. “We expect to see an increase in shoppers looking for options that can support their dogs’ everyday health,” she says. “Alongside this, we expect continued demand for premium options as shoppers look to upgrade their pets’ food or treats with something they perceive to be higher quality and more enjoyable for their furry companions.”

While dog owners are increasingly seeking dog food options that emphasise the overall health and wellbeing of their dogs, the persistent challenge of a cost-of-living crisis mean

the affordability and everyday value of pet food will remain paramount for the majority of shoppers in the medium term, says Butcher’s Cotterill. “It is very clear that investing in the health and wellbeing of dogs, while maintaining everyday value for their owners, will be a major driver of category growth for the foreseeable future,” he says.

Sources

- ¹ <http://tinyurl.com/77s63jzr>
- ^{2,3} <http://tinyurl.com/453kff23>
- ⁴⁻⁵ Circana, Major Multiples, Total Pet & Total Wet Dog, Volume 52 w/e 02.12.23
- ⁶ Butcher’s Consolidated EPOS, Total Market, Volume Sales, 52 w/e 02.02.23
- ⁷ See 4+5
- ⁸⁻⁹ Kantar Worldpanel, 52 w/e 24.12.23
- ¹⁰ Kantar Worldpanel, 52 w/e 23.12.23
- ¹¹ Circana, All Outlets GB, 52 w/e 27.01.24
- ¹² Circana, Major Mults, 52 w/e 30.12.23
- ¹³ Westland Consumer Research, Toluna 2022, 1500 respondents
- ¹⁴ GfK Management Report, Wild Bird, Total WBC Brands Panel Market, excl Iron Mongers, Jan-Dec 2022
- ¹⁵ See 14, Jan-Dec 2023 vs YA
- ¹⁶ GfK Management Report, Wild Bird, Total WBC Brands Panel Market excluding Iron Mongers, Jan-Dec 2023
- ¹⁷ Behaviourally Study, July 2023
- ¹⁸ Euromonitor, prepared gap
- ¹⁹ Kantar Worldpanel data to 21.01.24
- ²⁰ Circana, All Outlets, 52 w/e 30.12.23
- ²¹ See 16, scaled up from GfK’s 45% market coverage to 100%
- ²² Nielsen, Grocers, Value Sales for 12 m/e Dec 2023

Treats side panel

- ¹ Nielsen CPS, Dec 2023
- ² Streetbees, Dec 2023
- ³ Toluna March 2022 + Streetbees Inflation Tracker, June 2022
- ⁴⁻⁶ Circana, Volume Sales YoY, 52 w/e 30.12.23
- ⁷⁻⁹ Kantar, 52 w/e 03.09.23
- ¹⁰⁻¹² Circana, Major Mults, YTD to 30.12.23 and 12 w/e 30.12.23, branded lines, Weighted Unit RoS and Value RoS, comparison made vs all cat treat listings in >5% Wtd distribution
- ¹³⁻¹⁵ Kantar, 52 w/e 03.09.23

Healthy outlook

- ¹⁶⁻¹⁸ See 6
- ¹⁹ See 17
- ²⁰ Euromonitor projection - adjusted from 65% coverage
- ²¹⁻²³ Peggy, 2021, Dog parents (441), dog parents who give supplements (213)
- ²⁴ Circana, Major Mults, 52 w/e 27.01.24

Forthglade Foods

Natural, high-quality diet for dogs

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Grain-Free Complete Meals;
Puppy, Adult and Senior
Wholegrain Complete
Meals; Natural Dry Cold
Pressed Complete Dog
Food; Lightly Baked
Complete Dry Dog Food;
Multi-Functional Soft
Bite Treats; Meaty Treats;
Salmon Oil; Dental Sticks

Source

¹ Circana data, Volume Sales
YOY, 52 w/e 30.12.23

“As pioneers of natural wet dog food for over 50 years, making nutritious recipes with high-quality ingredients is Forthglade’s passion,” says David Cox, CEO. “More dog owners are educating themselves through social media, so we’re working with experts in their field – such as media vet Dr James Greenwood – to provide insight for them, while offering a natural, high-quality diet that is value for money, without compromising on the health and wellbeing of their dogs.”

Forthglade receives a high nutritional rating (above 80%) across its full wet food range from trusted website All About Dog Food. “Our puppy and adult wet recipes all contain 75% protein,” says Cox. “Consumer recognition has won us Best Wet Food in the Your Dog 2024 awards for the fourth year in a row.

“We kicked off 2023 with the relaunch of our hypo-allergenic Lifestage range, with tailored recipes to suit each stage of life,” he adds. “This provides dogs



“Our puppy and adult wet recipes all contain 75% protein”

with the correct nutritional value for their age – from higher levels of chondroitin and glucosamine in our senior recipes to support joint health, to salmon oil in our puppy recipes to help brain development.

“Forthglade outperforms the natural treats category (+12.8%)¹, and we also launched soft bite treats with a focus on training, health and wellbeing, alongside our new meaty treats range.”



EST. 1971
Forthglade
NATURAL PET FOOD FROM DEVON

award winning natural pet food

Denzel's

Seasonal playbook success

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KEY BRANDS

Denzel's

↙ Denzel's, the all-natural and premium dog treats brand, continues to expand the seasonal gifting and events space within the dog treats category. James Lacy, CEO & Denzel's dad, says: "Our 2023 seasonal results have proven that, more than ever before, dog parents are actively seeking out ways to include their dogs in seasonal celebrations and big moments; and Denzel's is playing a key role in maximising seasonal opportunities for retailers, averaging triple-digit uplift on seasonal lines."

Alongside a range of eight Christmas products, including a brand-first Advent Calendar Game for dogs, Denzel's collaborated with national hospitality partners to drive awareness and trial during the festive period. It launched a special-edition Christmas Dog Menu with Bill's restaurants and Limited Edition Mince Pie Traybakes with national coffee house Caffè Nero.

In addition, 2023 saw Denzel's drive further category uplift at Halloween and Valentine's Day, supported with national press coverage, digital media, influencer activations and off-shelf features in major multiples nationwide.

"Christmas gifting in the pet category is not new news, but there's significant headroom for innovation and growth during other calendar moments," says Nathan Perry, Denzel's co-founder & general manager. "Our Halloween Spooktacular Bones saw the highest-ever rate of sale for Denzel's to date, showcasing how unexpected seasonal offerings can provide enormous value for brands, as well as category growth."

Looking ahead, the challenger brand plans to drive awareness with a high-profile on-pack partnership later this year, helping Denzel's to recruit new customers in 2024 and beyond. "Denzel's has the highest propensity to purchase amongst those who are aware of the brand, versus our competitors," says Perry. "The key to growth in 2024 is all about driving awareness and we've built an exciting strategy to achieve this."

Since raising circa £3m investment in 2022, Denzel's has significantly grown its product portfolio, supporting its popular Denzel's Training Bites with



“The key to growth in 2024 is all about driving awareness and we've built an exciting strategy to achieve this”

the launch of two new ranges. The first, Denzel's Premium Rewards, are made with human-grade ingredients, air-dried in Ireland, and contain 70% freshly prepared meat or fish. The second, Denzel's Daily Dental Chews, are an all-natural and functional solution to dental hygiene, made with activated charcoal and vet-approved to maintain overall good oral health.

"2024 is set to be another year of exponential growth for Denzel's," says Lacy, as the brand continues to nurture its highly engaged community. "We're working on an exciting project to grow brand love and loyalty with our 'Genzennial Pet Parents'. Denzel's over-indexes with Gen Z & Millennial shoppers because we align with their personal values: they're consciously choosing fun and playful brands with delicious, all-natural ingredients that are produced in an ethical and sustainable manner. We're exploring creative ways to surprise and delight shoppers and their dogs, making pet bonding moments even more special."

DENZEL'STM

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for DOGS

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Sainsbury's

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at Home**

Mackle Petfoods

Naturo serves up new look

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KEY BRANDS

Naturo

The Naturo range is available in leading grocery retailers and pet specialist stores across the UK & Ireland. Mackle Petfoods currently employs 265 staff across its two sites in Moy and Moygashel and exports Naturo across 16 countries globally.

Leading natural pet food company Mackle Petfoods has announced a refresh of its entire award-winning Naturo brand. Created by owner John Mackle in 2010, Naturo has grown to become the No.1 natural wet pet food in the UK for seven years running¹, and is in the top 4 of all wet pet food brands manufactured UK-wide², reveals senior marketing manager Eva Mooney. The brand now has annual sales of £30m globally.

Alongside the full rebrand, the company has announced several new ranges to add to the already popular food range for cats and dogs. “The Naturo brand provides nutritious, complete food for kittens through to senior cats, and puppies to senior dogs, and includes foods for pets with sensitive guts, allergies and special dietary needs,” explains Mooney. “All ingredients for the healthy, clean, food recipes are created by Naturo’s own expert pet nutritionists and include no artificial flavouring, colours, or preservatives. With 100% traceability from farm to bowl, and ingredients sourced locally (where possible), the range provides food for cats and dogs across all life stages.”

The Naturo brand is created on six key nutrients – protein, carbohydrates, omega oils, prebiotics, minerals and vitamins – brought together through a range of recipes to help pets with healthy growth, digestive systems, coat maintenance, healthy hearts and wellbeing and vitality. The rebrand of Naturo reflects the core values and focus of the brand and promotes the natural ingredients and benefits to pets and their owners. As a pet food family



“Mackle Petfoods developed Naturo to provide premium but affordable natural food to pets, using high-quality ingredients and providing healthy diets for cats and dogs”

business created over 50 years ago in Co. Tyrone, Northern Ireland, Mackle Petfoods developed Naturo to provide premium but affordable natural food to pets, using high-quality ingredients and providing healthy diets for cats and dogs while establishing a brand that pet parents can trust.

Commenting on the relaunch, Mooney says: “We are delighted to share the new refresh of our Naturo brand, focused on the benefits and nutritional value of the product range. While the brand has been refreshed over nine months, the most important thing is the same excellent quality products remain for pets to enjoy.

“Working with our in-house nutritionist, we have improved our recipes to build on the already excellent Naturo products reflecting our ongoing relationship with pet owners who, like us, want the best for their pets. Changes to recipes include increases in meat content in certain ranges, and the introduction of ingredients which have benefits across the mix of vegetables and fruit within recipes, with yucca and prebiotics promoting gut health.

“The rebrand has given us the opportunity to educate our customers about their pets’ nutritional needs, and how Naturo’s nutritional, tasty ranges deliver this.”

Source
^{1,2} IRI Grocer Retail 12/23

**NEW
LOOK**

**SAME GREAT
TASTE**



NATURO

NATURAL PET FOOD



THE UK'S
NO.1
NATURAL
WET DOG FOOD*

*Source: IRI Grocery Retail,
December 2023



GOODNESS THAT TASTES GOOD

www.naturopetfoods.com

028 8778 4641



Mars Petcare

Keep cats purring with Whiskas

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KEY BRANDS

- WHISKAS®**
- Classics
 - DUO
 - TASTY MIX
 - DENTABITES
 - TEMPTATIONS™

“Over the last year, it has been comforting to see the petcare category remain in volume growth and be one of the only categories to do so within FMCG¹,” says Annie Argyle, European brand director for Whiskas. “This can be largely attributed to the number of pet owners remaining reluctant to alter their pet’s feeding habits. Even in the face of cost-of-living challenges, owners want their pets to have the very best. However, this doesn’t mean shoppers aren’t making any changes to their spending habits to be more cost-efficient. As opposed to downgrading their beloved pets’ favourites, they are switching to tactics such as bulk-buying and shopping with multiple retailers to find the best value.

“So, it’s more important than ever for retailers to attract and retain shoppers, and offering consumers choice across both premium and best-seller options is one way to do just this,” she says.

“With this in mind, we understand our role in ensuring shoppers remain engaged with our well-known brands and, last year, we relaunched our full Whiskas portfolio with a complete new look and feel, upgraded products and the introduction of two new sub-ranges. These include Whiskas Duo, offering cats ultimate enjoyment with two flavours in each pouch, and Whiskas Tasty Mix, containing a tantalising mix of ingredients in tasty gravy for maximum variety at mealtimes. This move was to ensure Whiskas products remain pet favourites, while assuring shoppers that our brand is top-quality, no matter how their shopping behaviours may shift.



Winner Pet Food Category. Survey of 8,000 people by Kantar

“Last year we relaunched our full Whiskas portfolio with a complete new look and feel, upgraded products and the introduction of two new sub-ranges”

“We have seen a significantly positive response from pets and their owners,” reveals Argyle. “Our two new sub-ranges have not only been loved by cats, but have delivered substantial incrementality to the category and to the Whiskas brand². This relaunch was also the biggest driver of cat wet single-serve growth last year, rising 9.2% in volume across a 12-week period (30% in units)³. Consumers have voted with their feet, and Whiskas has won the UK Product of the Year Award 2024 in the cat food category, where pet owners voted for their favourite products.

“This year, Whiskas will continue to be a priority in terms of support across our portfolio as we aim to feed even more cats around the UK,” she adds. “To achieve this, we have a plethora of exciting plans to support the brand through the year, including our latest campaign, Bring on Purr O’clock. Launched in January 2024, Bring on Purr O’clock is centred around the perception that humans spend all day looking forward to those little things in life – a cup of tea in the morning or our favourite show in the evening. And... so do our cats! The campaign aims to ensure Whiskas stays front of mind with shoppers to keep them, and their cats, coming back for more.”



Source

¹ Nielsen Homescan, 17.06.23
² Nielsen CPS, L12W vs YA to 15.07.23
³ WHISKAS: Nielsen CPS, L12W vs YA to 07.10.23

Bring on Purr O'clock



Consumer Survey of
Product Innovation
2024



* Winner Cat Food Category. Survey of 8,000 people
by Kantar. © 2024 Mars or Affiliates

Peckish

Prioritising sustainability

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KEY BRANDS

Peckish Complete Seed Mix
Peckish Coco-Not®
Wild Bird Feeder
Peckish Ready To Use Filled Feeders

Five years ago, Peckish embarked on its 'Field to Beak' strategy, a journey of discovery, and a plan of action to ensure it always places sustainability first, reveals head of brand & category Rachael McWilliam. "We looked at our whole business – from supply chain, to packaging, to distribution. Every change implemented is a step in the right direction, and we continue to innovate and evolve."

"Our latest innovation – and one we're truly proud of – is the introduction of the Coco-Not feeder, which won last year's GLEE (Garden, Leisure and Equipment Exhibition) award for Wild Bird Care and Wildlife Product," she reveals. "Many consumers are familiar with the suet-filled coconut shell as a simple way to keep garden birds fed. We wanted to go one step further, and develop a shell that could be produced locally, as currently coconut shells are shipped around the world, giving them a high carbon footprint in terms of miles travelled. Our Coco-Not, manufactured using UK harvest waste, biodegrades at the same rate as a banana peel, so it isn't there after just 12 weeks. Consumers can either compost them at home or pop them in their food waste recycling bin. They can either be hung from trees or popped on a bird feeding station."

Over the past 18 months, Peckish has also transitioned to paper packaging for its most popular collections – Peckish Complete, Peckish No Grow, and Peckish Natural Balance. "So far, this has resulted in 75 fewer tonnes of non-recyclable plastic bags heading to landfill, and we're continuing to test additional solutions to ensure we can further reduce our plastic use," she says.

"Starting in December 2023, and into spring this year, we've supported



“Our latest innovation is the introduction of the Coco-Not, manufactured using UK harvest waste”

the Peckish brand with a £1.5m media campaign that aims to raise awareness and drive category sales. It includes a new creative that celebrates the nation's love of nature, and the vivid colours that wild birds bring to gardens.

"Our 'Colour In Your Garden' campaign launched on Christmas Day – a perfect opportunity for us to get in front of our target audience of ABC1, 55+ adults, many of whom would have been enjoying festive TV shows. Reaching 25 million consumers, it was brought to life through TV, VOD, social media, press and in-store executions.

"The star of our advert highlights our brand promise of sustainably sourced ingredients with our Peckish Complete Seed Mix – a blend of 12 seeds enriched with Calvita to provide essential nutrients that attract a wide variety of garden birds. This mix comes in 100% kerbside recyclable paper packaging, so both retailers and their customers can feel good about feeding wild birds."



Colour in the garden with Peckish[®]



NO.1 UK BIRD CARE BRAND*

£1 IN EVERY £5 SPENT ON PECKISH*

£1.5M TV INVESTMENT



Peckish[®]
for nature

Pets Choice

Continuing ambitious growth

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KEY BRANDS

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Meatiful
Felight
TastyBone
Bob Martin

 Blackburn-based Pets Choice has over 135 years' experience in developing leading brands, product innovation and brand investment across a diverse portfolio of categories, says head of marketing Lisa Melvin.

"Investment & innovation are the recipe for success," she says. "Growth continues from this investment drive, with Pets Choice now the sixth-largest branded manufacturer, growing ahead of the market by 12%, and the leading manufacturer for volume growth¹."

Brand investment: a key ingredient

The cost-of-living crisis continues to bite – and genuine value for money, quality and pet health will remain at the top of shoppers' lists, notes Melvin. "So, we've increased promotional activity on core categories, with cross-category multi-buy promotions, and a medium-low pricing initiative to drive trial of Webbox Naturals," she says. "A £500k campaign for Webbox Naturals is now live, supported by a value-illustrating money-back guarantee, promising pet parents a 100% refund if their canine or feline isn't satisfied with the tasty recipes, made with natural ingredients.

"We'll repeat our successful 9/10 cats Licked it and Loved it campaign for Webbox Lick-e-Lix, to sustain its 16% YOY growth²; six of the top 10 fastest-selling treats in the market, as well as the UK's No.1 cat treat product, fall under the Lick-e-Lix brand³."

Insight-led innovation

Humanisation continues to provide incremental purchase and category growth opportunities, adds Melvin.



“At Pets Choice investment & innovation are the recipe for success”

"This dominates several seasonal ranges, which have become increasingly important to our brands' overall performance and, as such, remain a key driver in our innovation pipeline. Webbox had a strong Christmas 2023, with tasty treats and tantalising toys all ranking in the top five rates of sale for festive performance in their categories," she says.

"A demand for natural, affordable, sustainable pet products also inspired brand extensions for Felight. Already the second-largest and fastest-growing major brand⁴, Felight, which has reached a value of £10m+ via distribution and loyalty increases, provides shoppers with a great solution that balances performance with value and sustainability credentials."

In 2023, Felight launched Natural Wheat Pellets as a replacement for traditional wood litters. This 100% wheat alternative outperforms wood by absorbing quadruple its own weight in liquid, reveals Melvin. "Sourced exclusively from UK farms within a 50-mile radius of manufacture, the litter is produced from a rapidly renewable crop, that takes one year to grow vs 20 years for trees used in wood pellets," she says. "We are committed to innovating in sustainability, and growing our range following the successful launch in 2022 of Felight Eco Litter."



Source

¹ Circana, IRI All Outlets, 52 w/e 27.01.24
² Circana, Major Mults YTD to 30.12.23 and 12 w/e 30.12.23, Branded Lines, Weighted Unit RoS and Value RoS, Comparison made versus all cat treat listings in >5% Wtd. Distribution
³ Circana, 52 w/e 30.12.23
⁴ Circana, IRI All Outlets, 52 w/e 27.01.24

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Retailer
TV
Tagging

Stock up on Webbox Naturals, growing 13% YoY*

* Circana, 52 w/e 30.12.23

Purina Petcare

Trade up and fuel growth

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KEY BRANDS

Felix

 Felix has a rich history as a disruptive force in the market, emerging in the 1980s as a challenger brand and maintaining its fun and mischievous image over the years, says Purina Petcare.

“The cheeky rascal character of Felix resonates with people, reminding them of their own beloved cats and the lovable traits that make them special,” it says. “While Felix focuses on creating irresistibly tasty food, it also ensures that main meals are complete and balanced, earning the trust of cat owners who want their feline companions to be healthy, energetic, and ready for mischief.”

The brand offers a wide variety of suit all shoppers and their different budgets, which includes Felix Original, As Good as it Looks and more premium ranges such as Tasty shreds and Deliciously sliced. Additionally, cat owners can complement these complete and balanced meals with the brand’s range of Felix Soup and Felix treats.

As the No.1 pet food brand in the UK¹, Felix has achieved record sales of over £288m in the latest 52 weeks². This highlights the brand’s significance to retailers, as it is purchased by 2.6m households and boasts an impressive 71% repeat purchase rate³.

Encouraging consumers to trade up

Over the past five years, the brand has successfully focused on premiumising shoppers, encouraging them to trade up from the entry range, Felix Original, to



“Felix Original plays a crucial role in the category, providing an entry point to the brand for more value-driven shoppers”

the market-leading As Good as it Looks range, resulting in a CAGR of 4.7% for this part of the portfolio⁴. Furthermore, Felix has introduced premium innovations that currently contribute £29m in value sales⁵.

However, with inflation impacting the market in 2022/2023, there is a polarisation of spend, with shoppers downtrading into private label and trading up into luxury brands like Gourmet. Felix Original, therefore plays a crucial role in the category, providing an entry point to the brand for more value-driven shoppers.

In this context, it becomes even more important for brands to support shoppers in delivering perceived value and for Felix this is being brought to life through unmissable visibility, showcasing its No.1 pet food brand credentials and great taste to cat owners in stores across the UK.

“Showcasing Felix Original and ensuring unmissable visibility in stores, retailers can deliver perceived value and cater to the needs of a wide range of cat owners, ultimately driving sales and fostering customer loyalty,” it says. “Join the Felix journey and embrace the opportunity to offer cat owners the irresistible taste and quality they desire, while contributing to the growth and success of the pet food category.”

Source

1. Circana Market Advantage, All Outlets Pet UK, Value Sales, 52 w/e 27.01.23.
2. Circana Market Advantage, All Outlets Pet UK, Total Felix Value Sales, 52 w/e 27.01.23
3. Kantar, Total stores, Total Felix, Total/Repeat Buyers %, 52 w/e 21.01.24
4. Circana Market Advantage, All Outlets Pet UK, Value Sales, 52 w/e 27.01.23.
5. Circana Market Advantage, All Outlets Pet UK, Value Sales 52 w/e 27.01.23. Felix Soups, Tasty Shreds, Naturally Delicious & Deliciously Sliced





felix

The NO.1 Pet Food Brand* ...



“Our fussy cat will
only eat Felix®”

Billy, Cumbria



Choose great taste every day

PURINA
felix
IT'S GREAT
TO BE A CAT!

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Your Pet, Our Passion.®

Spectrum Brands EMEA UK

Treats with a difference

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Compostable Poo Bags
– Real Meat – Chicken
Strips & Beef Strips
– Chewables

Good Boy continues to be the nation's No.1 dog treat brand¹, reveals owner Spectrum Brands. “For Good Boy, we have been able to remain in growth for the majority of the year, although from a volume perspective it has been a challenge to stay on an upward curve as customers have tightened spending due to the wider macro pressures,” says the company.

“For a large part of the year there have still been some pressures within the supply chain and on the cost of goods. However, it looks as though we are now over the worst of this, and the market has begun to stabilise for the latter part of 2023.

“In terms of the treat market, within the higher ASP products, such as Good Boy, we have started to see trends moving in favour of larger pack sizes, as customers seem to be more conscious of their spending, which is leading them towards bulk purchases where they can get better value for money.”

Tailoring treats to different dogs

Different owners choose treats tailored to their dogs' behaviours. Whether it's for occupying them, rewarding training or good behaviour, or for maintaining dental health, every dog has its preference, adds the company.

“For fussier pups craving real meat treats with high nutritional value, we offer a range wrapped in even more meat to truly capture their interest,” it says.

“This year we launched Meaty Sticks – our brand-new reward range. These



“This year we launched Meaty Sticks, our brand-new reward range, designed for treating on the go”

are designed for treating on the go as they are easy to break into small pieces and some in a handy, pocket-sized pack. Available in Chicken, Duck, Beef, Triple Flavour and Peanut Butter, our Meaty Sticks are made with over 90% real meat, while our Peanut Butter option is meat-free.”

Sustainable moves

There have also been sustainable product launches over the past year, particularly in hygiene, which is being received positively by shoppers, says Spectrum. “For instance, Good Boy has launched its Clean & Kind range into the market this year, consisting of compostable poo bags and pet wipes, which are working well,” it says.

“In 2024, the company's focus remains on introducing new and exciting products to develop the category while catering to the diverse needs of every dog and driving sales growth. “We will also continue to educate shoppers and enhance their in-store experience through strategic merchandising and point of sale.”

Source
¹ Nielsen Scantrack, 52 w/e 27.01.24



GOOD BOY



THE UK'S FAVOURITE DOG TREAT BRAND*

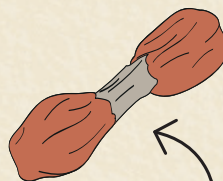
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*Nielsen Scantrack 52 week ending 25/02/2023.

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