



# IRI Pulse Report Pet Care

Welcome to the Pulse H1 2016 edition for pet care. We hope that you find it useful. Please do not hesitate to contact us if you have any questions or comments at [EU.Marketing@IRIworldwide.com](mailto:EU.Marketing@IRIworldwide.com).

**H1 2016**

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## About the Report

- This pet report is one of 10 super category reports designed to show high-level comparison and analysis for retail markets across major countries in Europe.
- This report contains data gathered from countries across Europe. This market was split into the following categories: dog food, cat food, other pet food and pet accessories.
- The report highlights key metrics, such as total sales figures, market trends, category shares, and winners and losers for Europe and individual countries.
- The data has been sourced from IRI retail databases and Eurostat, the statistical branch of administration for the European Commission.
- The countries included in the report are France, Germany, Italy, the Netherlands, Spain and the United Kingdom (UK).
- The market channels used for each country in this report are as follows:

Country	Channels used
UK	Hypermarkets, supermarkets, drugstores and impulse outlets
ES	Hypermarkets, supermarkets, hard discounters and drugstores, including the Canary Islands
DE	Hypermarkets, supermarkets, hard discounters and drugstores
NL	Hypermarkets, supermarkets, hard discounters and drugstores
IT	Hypermarkets, supermarkets, small self service, hard discounters and drugstores
FR	Hypermarkets and supermarkets

- For analytical purposes, the data sourced from available retail databases has been consolidated to provide consistent results. However, for some countries it is not possible to source data pertaining to certain categories. In these instances, it has been documented in the 'notes' section found at the end of the report.

## On the Radar

The pet category has confirmed its recovery in the current period (the 12 months ending June 2016). In fact its value sales growth across Europe has stayed positive and equal to +0.9% versus the corresponding period of 2015. The IRI report (for the 12 months ending December 2015) also showed a growth of +1.0%, that was a turning point when compared to a negative 2014, where value sales declined by 0.4%. Even if pet care category performance does not keep up with past growth levels, its trend is positive and in line with FMCG trends or even better in some cases. The value sales increase of pet care comes from an increase in prices, while volume sales are generally stable or slightly decreasing. Different trends are present across the countries: single serve products are growing and private labels are declining across most countries.

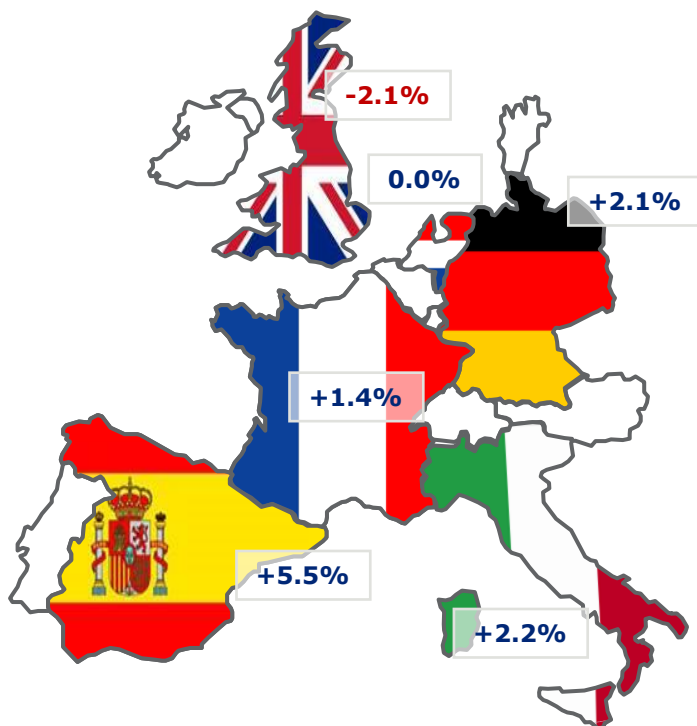
### ECONOMIC FIGURES INFLUENCING CONSUMER BEHAVIOUR

	POPULATION IN MILLIONS		UNEMPLOYMENT (%)		AVERAGE 12 MONTHS INFLATION RATES		GDP IN MILLIONS (€)	
	Jan. 2014	Jan. 2015	Dec. 2015	Average 2015	Dec. 2015	Average 2015	2013	2014 (Estimate)
France	65.8	66.3	10.2	10.4	+0.1	+0.7	2 116 565	2 132 449
Germany	80.7	81.1	4.5	4.6	+0.1	+0.9	2 820 820	2 915 650
Italy	60.7	60.7	11.4	12.7	+0.1	+0.3	1 609 462	1 616 253
Netherlands	16.8	16.9	6.6	6.9	+0.2	+0.5	650 857	662 770
Spain	46.5	46.4	26.6	22.1	-0.6	+0.0	1 049 181	1 058 469
United Kingdom	64.3	64.7	5.1	6.1	+0.0	+1.7	2 017 193	2 222 912

Source: Eurostat, January 2016

# GLOBAL TRENDS

## TOTAL PET VALUE SALES AND % CHANGE VERSUS PRIOR YEAR

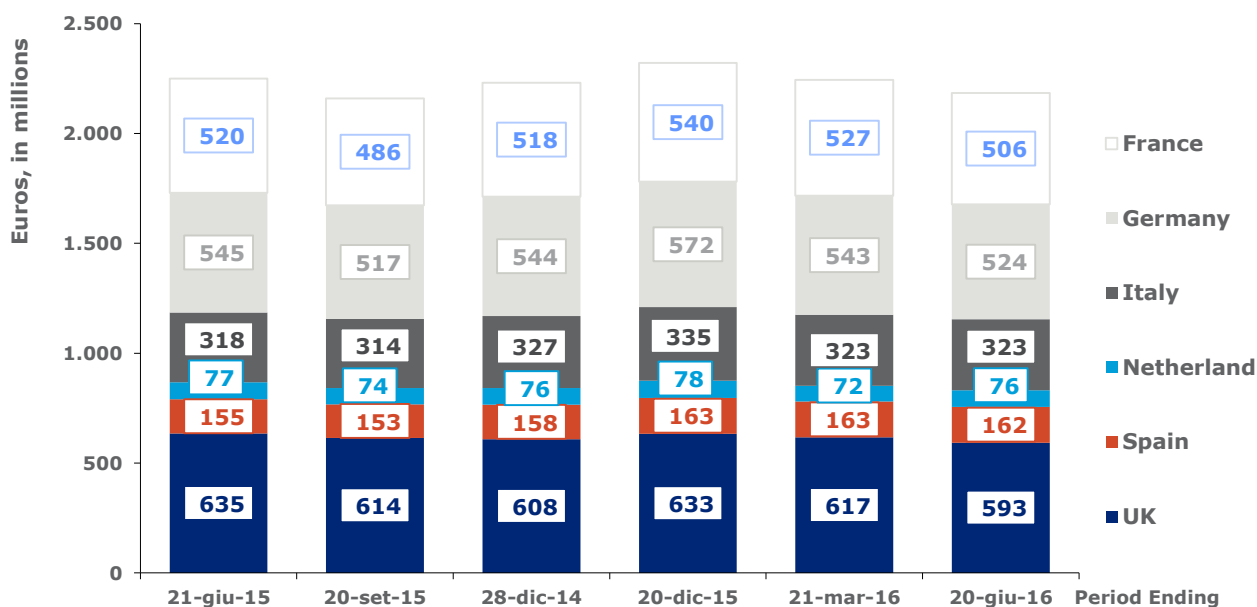


VALUE SALES IN MILLIONS (€)	
Total EU	9 980
UK	2 451*
DE	2 182
FR	2 091
IT	1 308
ES	646
NL	301

\*based on an exchange rate of €1.31 to the pound

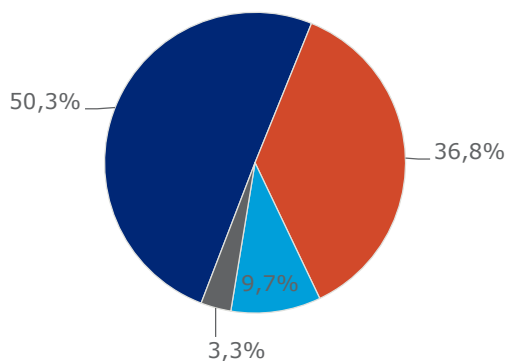
**TOTAL EUROPE +0.9%**

## TOTAL PET VALUE SALES FOR THE LAST SIX QUARTERS

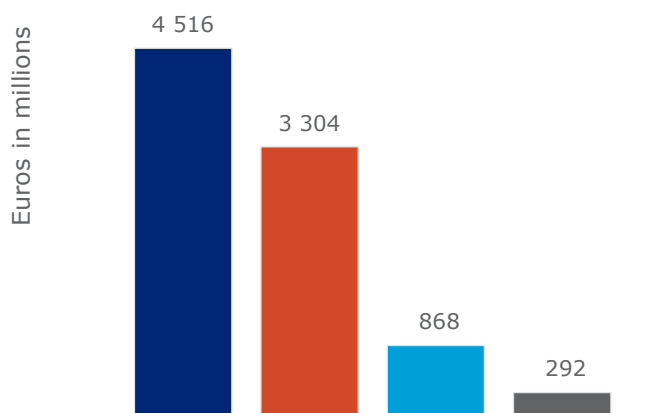


Source: IRI retail databases; period ending 20 June 2016

## CATEGORY SHARE OF VALUE IN THE LAST YEAR



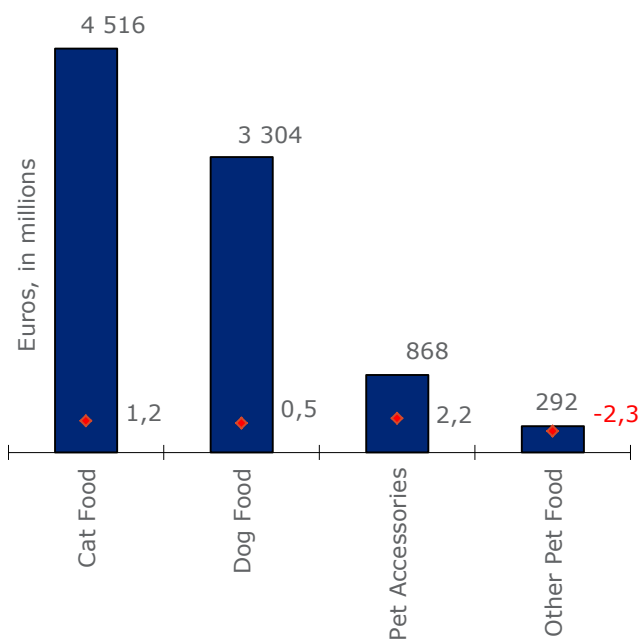
## CATEGORY VALUE SALES IN THE LAST YEAR



■ Cat Food ■ Dog Food ■ Pet Accessories ■ Other Pet Food

## TOP 5 CATEGORIES: EVOLUTION

Value sales (€) and % change versus a year ago



■ Euro Sales ◆ % € vs. YA

## KEY TRENDS

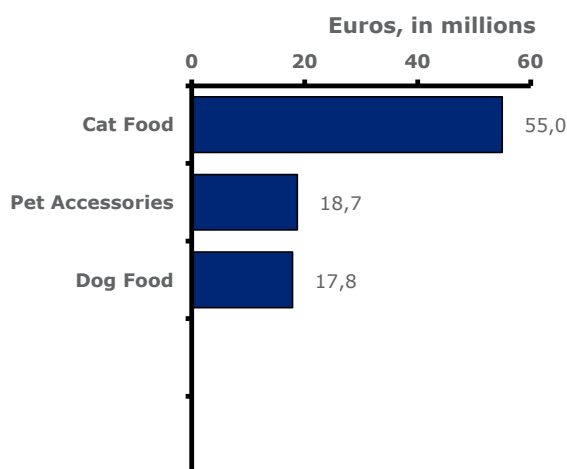
- The value of the European market has increased across the six countries in the year ending June 2016 at +0.9%. It is not a big growth, but it is a confirmation of the positive trend of 2015.
- Four out of the six countries are experiencing a growth in sales (Spain, Italy, Germany and France), with the UK and the Netherlands being the exceptions. Spain is the best performer (+5.5%) and then Italy (+2.2%).
- Cat food is the core business of pet care (representing 50.3% of the category) and shows good growth (1.2%) that influences the category's overall performance. Dog food is growing at a much slower pace and other pet food displays a negative trend.
- Pet accessories are recording the best positive trend, with a growth of +2.2%.

Europe includes: France, Germany, Italy, the Netherlands, Spain and the United Kingdom

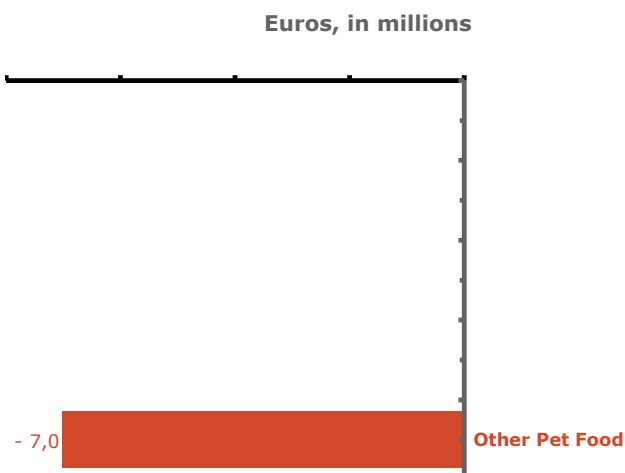
Source: IRI retail databases; period ending 20 June 2016



### TOP WINNERS: VALUE SALES CHANGE VERSUS A YEAR AGO (€)



### TOP LOSERS: VALUE SALES CHANGE VERSUS A YEAR AGO (€)



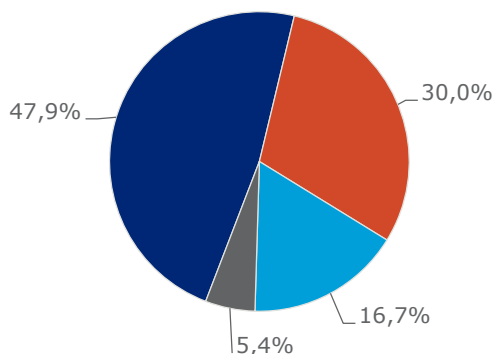
### CATEGORY KEY FACTS

- The most significant contributor to the performance of pet care across Europe is definitely cat food (+55.0. million euros). Dog food also shows a visible contribution to the growth of the category (+18.7 million euros), even if it is at a lower level than cat food.
- The dog snacks and treats segment is becoming increasingly important and significant due to its growth in value and volume across the European countries analysed.
- Wet cat single serve and, to a lesser extent, dry cat food are the drivers for cat food and where brands are investing the most.
- The main areas of innovation by major brands are premium tastes in small sizes and user friendly packages. Unless we consider the growing importance of the oral care benefit in snacks and treats, which was an innovation from some years ago, so no new concepts or innovations are entering the market.
- As a sector pet care has experienced the growth of premium quality products in small sizes (single serve). The shopper of dog food may behave very differently from the shopper of cat food. This presents a key challenge for manufacturers who need to respond by taking specific actions, considering how the shopper behaves differently from category to category.
- Pet care continues to become more competitive for branded products in mainstream segments.
- The pet care sector highlights the fact that private labels are losing share across most countries.

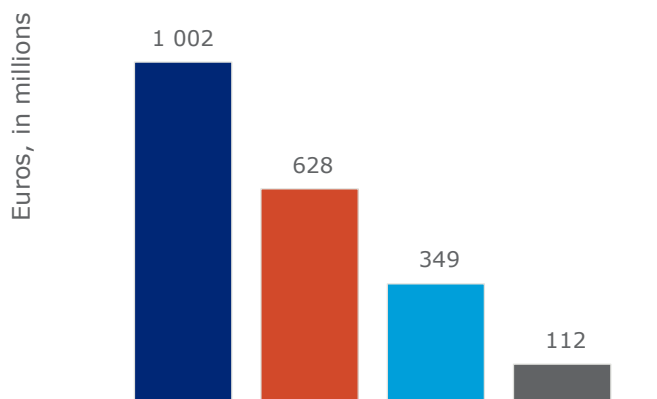
Europe includes: France, Germany, Italy, the Netherlands, Spain and the United Kingdom

Source: IRI retail databases; period ending 20 June 2016

## CATEGORY SHARE OF VALUE IN THE LAST YEAR



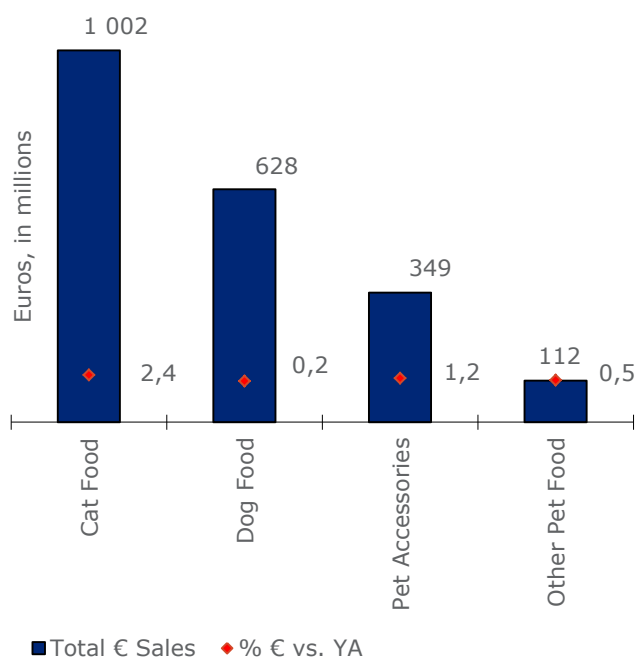
## CATEGORY VALUE SALES IN THE LAST YEAR



■ Cat Food ■ Dog Food ■ Pet Accessories ■ Other Pet Food

## TOP 5 CATEGORIES: EVOLUTION

Value sales (€) and % change versus a year ago



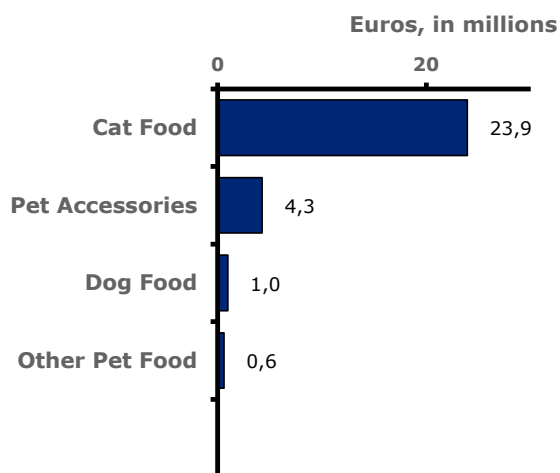
## KEY TRENDS

- A change on pet market, which is dynamic in value sales (+1.2%), but slightly negative in volume sales (-0.4%): a real capability of valorization, despite the strong price war between banners on this category (deflation -2.15% versus -1.13% for average FMCG).
- There is an opposition between cat food (still dynamic, +2.4%) versus dog food (quite flat +0.2%).
- Cat food: is performing well, mainly driven by dry food (+3.1%); wet food is growing to a lesser extent (+1.5%).
- Dog food: the core business of dry food is quite stable (+0.3%), while wet food is still performing badly (-1.5%).
- The pet accessories category is in better health versus 2015 (+1.2%): due to cat litter, which is performing well (+1.6%).
- There has been little growth for other pet food (+0.5%), due to positive growth for bird food only (+5.7%).

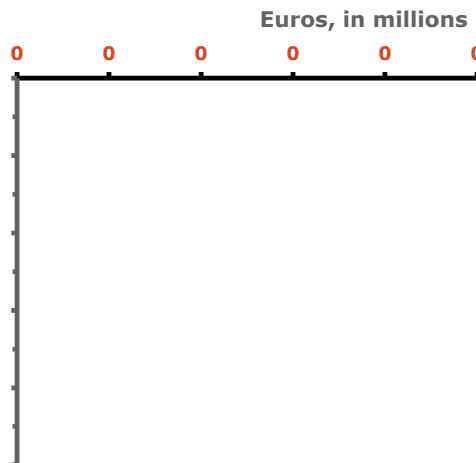
Source: IRI retail databases; period ending 20 June 2016



### TOP WINNERS: VALUE SALES CHANGE VERSUS A YEAR AGO (€)



### TOP LOSERS: VALUE SALES CHANGE VERSUS A YEAR AGO (€)



### CATEGORY KEY FACTS

- **Cat food** is the main driver of pet growth, as a result of the continuous success of dry food (+3.1%) and also single-serve wet food (+5.2%). There has been a significant contribution of offer enlargement on the growth of these two families (dry cat food: offer + 3.3% in hypermarkets in 2016 versus 2015, +2.4% for single-serve wet cat food for the same period).
- There has been a limited recovery for **dog food** (+0.2%) after the difficulties of last year. This was due to dry snacks (+6.1%), a segment which benefits from offer rise (+7.7% in hypermarkets, +5.2% in supermarkets) and higher promotional activation (8.9% of the turnover realised on promotion, +0.8pt versus a year ago).
- For **pet accessories** (+1.2%), only cat litter is rising (+1.6%), due to offer enlargement in hypermarkets (+4.1%) and supermarkets (+1.0%).
- For **other pet food** (+0.5%), bird food has performed well (+5.7%), despite a rationalisation of the assortment for this channel.

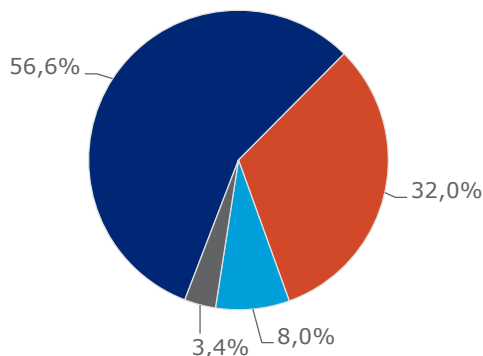
Source: IRI retail databases; period ending 20 June 2016



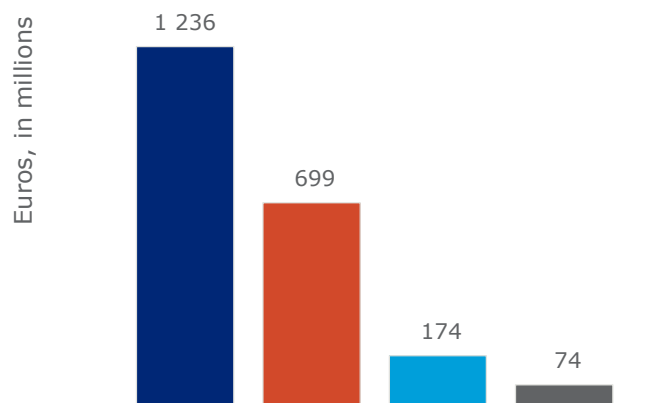


# Germany

## CATEGORY SHARE OF VALUE IN THE LAST YEAR



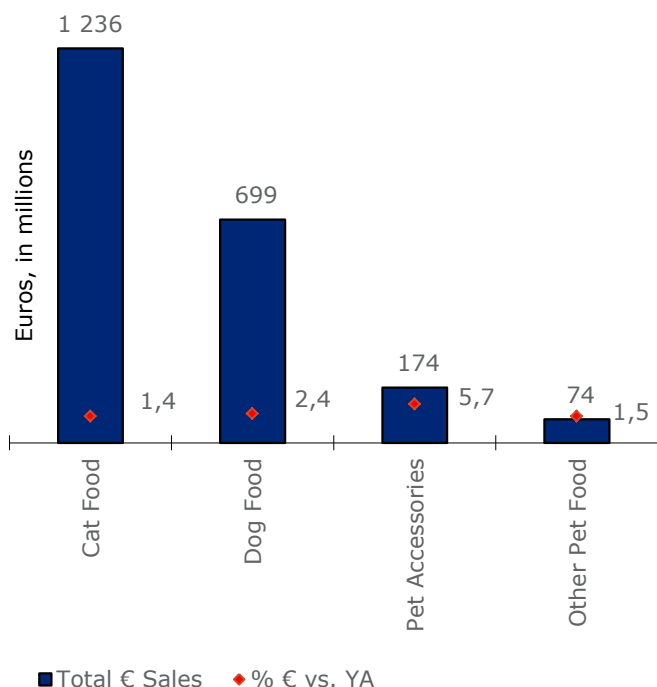
## CATEGORY VALUE SALES IN THE LAST YEAR



■ Cat Food ■ Dog Food ■ Pet Accessories ■ Other Pet Food

## TOP 5 CATEGORIES: EVOLUTION

Value sales (€) and % change versus a year ago



## KEY TRENDS

- Pet care in Germany has grown by 2.1% in value sales driven by growth from dog and cat food, small animal feed/rodents and cat litter categories. Growth is mainly shaped by an increase in normal value sales across all the categories except the cat food category where it grew significantly due to promoted value sales (+24 million euros).
- Dog and cat food now contribute 89% value sales to the total pet food business while in terms of volume sales only cat food has grown due to no change in pricing compared to a year ago. Meanwhile dog food has declined in volume due to increased prices attributed to inflation.
- Markant ex. Real, Edeka and hypermarkets are the only retailers that are growing. Markant ex. Real has grown significantly by +21.5%.
- Discounters, which continue to have the highest value share of 42%, show the greatest decline for cat food followed by dog food.
- Pet accessories is showing the best development in volumes, mainly due to growth in cat litter. It is the only sub-category displaying growth.

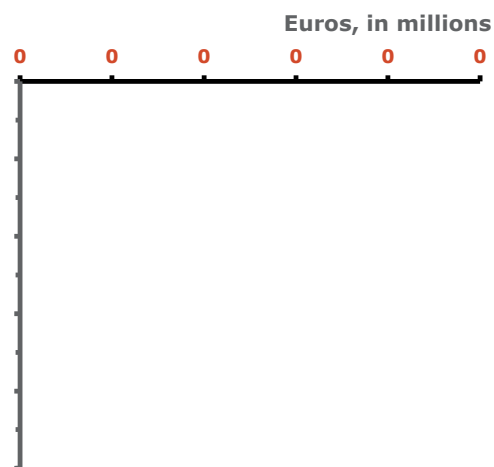
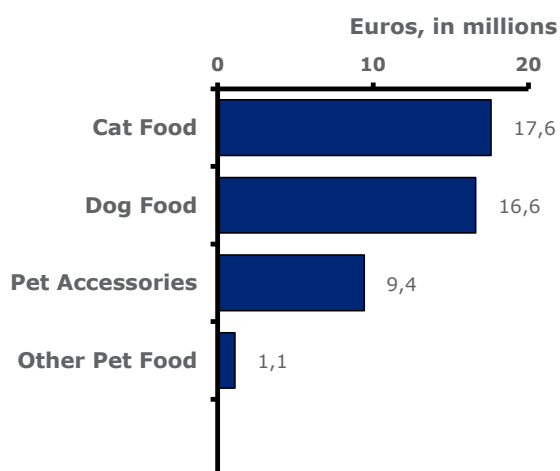
Source: IRI retail databases; period ending 20 June 2016



## Germany

### TOP WINNERS: VALUE SALES CHANGE VERSUS A YEAR AGO (€)

### TOP LOSERS: VALUE SALES CHANGE VERSUS A YEAR AGO (€)



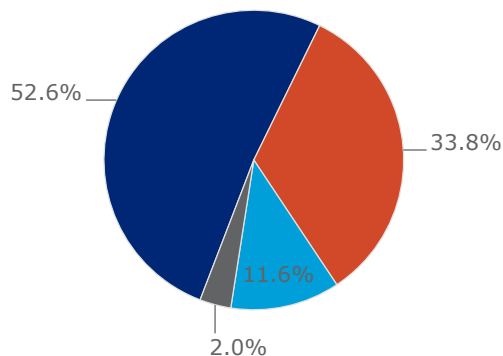
### CATEGORY KEY FACTS

- **Cat food** contributes overall 57% value share to the pet food business. The total growth which is driven from promotional value and volume sales is offsetting the declines from normal sales. Although shelf space increased by +8.1 items, it could not help to boost the growth of overall normal sales. Markant ex. Real and Edeka drive the highest growth, both in terms of value and volume sales, due to growth from private labels.
- **Dog food** is the second most successful category with 32% value share contribution to overall pet food. Unlike cat food there was a different trend with most of its value growth driven from normal value sales while promotions had minimal effect with only marginal growth. Volume sales declined and this can be attributed to significant increases in prices. Private labels are the primary contributors at 82% value growth. Markant ex. Real hypermarkets, Edeka and Rewe were the only retailers contributing to the growth of dog food. All the retailers had highest growth from normal sales.
- For pet accessories growth has been driven by the cat litter category only at +6.7%. This positive development can be attributed to 71% growth in normal sales. The highest growth of +24.4% was from Markant ex. Real followed by discounters at +18.2% while hypermarkets experienced the highest decline by -4.7%.
- **Other pet food** has only grown from the category small animal feed/rodents (by +4.6%). A significant increase in normal prices (+0.17 euros) has helped in total normal value growth while promotional value and volume has grown by reduced promotional price (by -0.15 euros). Markant ex. Real and hard discounters (Aldi/Lidl/Norma) were the only retailers registering growth.

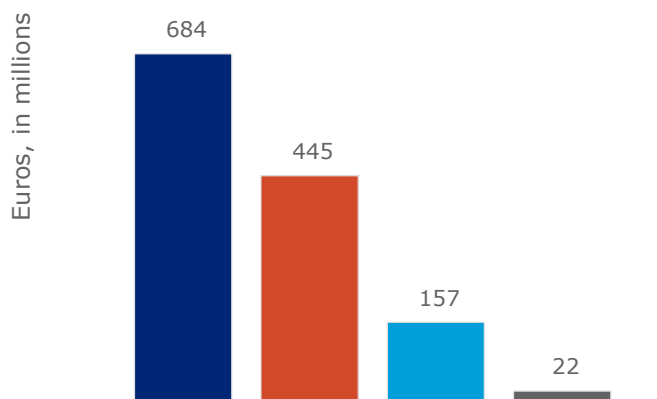
Source: IRI retail databases; period ending 20 June 2016



### CATEGORY SHARE OF VALUE IN THE LAST YEAR



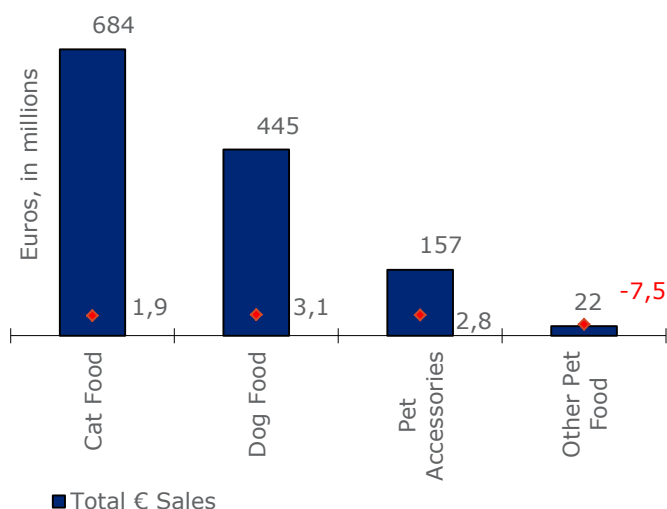
### CATEGORY VALUE SALES IN THE LAST YEAR



■ Cat Food ■ Dog Food ■ Pet Accessories ■ Other Pet Food

### TOP 5 CATEGORIES: EVOLUTION

Value sales (€) and % change versus a year ago



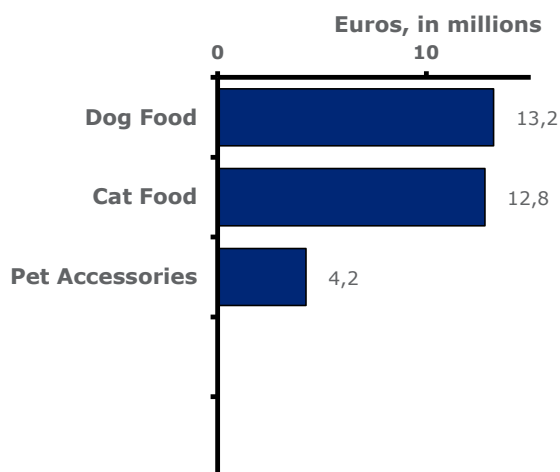
### KEY FINDINGS

- Total cat and dog food show a visible growth in value sales in the year ending Q2 2016 (1.9% for cat food and 3.1% for dog food), but volumes cannot keep up (i.e. volumes are positive but cannot keep up with values). So the value growth of cat and dog food comes from increasing prices.
- Cat food remains the largest sector of the category, representing 52.6% of the total value sales, with dog food assuming 33.8% and accessories 11.6%. Other pet food shows a marginal 2.0% share on pet care and is declining in value sales (-7.5%).
- Dry pet food continues to perform better than wet pet food. Wet cat single serve is outperforming wet cat food and dog food confirms a positive value trend for wet small and medium products.
- Snacks and treats remain the fastest growing segment of the category, especially for cat (+15.7% in value), but also for dog food (+8.4% in value).

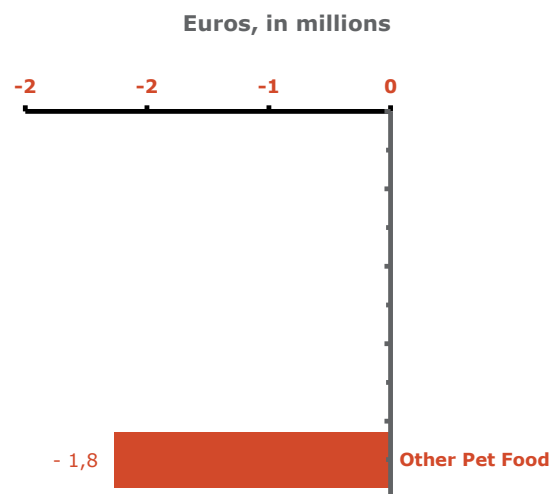
Source: IRI retail databases; period ending 20 June 2016



### TOP WINNERS: VALUE SALES CHANGE VERSUS A YEAR AGO (€)



### TOP LOSERS: VALUE SALES CHANGE VERSUS A YEAR AGO (€)



### CATEGORY KEY FACTS

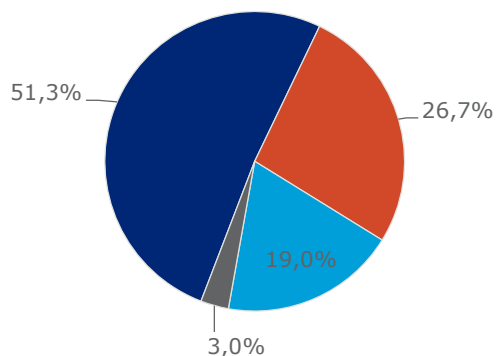
- The main contribution to the growth of the pet care category comes from dog food, with a 13.2 million euros increase in sales. The growth of cat food is almost alike and worth 12.8 million euros. Pet accessories are positive with a 4.2 million euros increase whilst other pet food (birds, fish, turtles, rodents) continues to provide a negative contribution to pet care.
- Products in small packages still drive the positive performance of the market, especially in cat food. This confirms that there is a cluster of shoppers who buy premium products (with user friendly packages and special tastes) and who are not affected by the general difficult economic situation, which is slowly recovering.
- The increasing attention to pets' health is reflected in the visible growth of the dog functional (oral care for instance) and maintenance snack and treats segment. Cat snack and treats still is a niche market, showing a double digit growth.
- Other pet food still confirms a loss of value sales, being the only negative contributor to pet care.
- Promotions and private labels matter a lot in pet care, which is becoming more and more competitive: the percent of promoted volumes in pet food reaches 28.2%, with a growth of +1.2 points versus a year ago. Private labels stand for 37.2% in volume market share but they are down -1.5 points versus 2015.
- Pet care has not been highly impacted by the seven year recession that Italy has experienced and it is now growing more than the average for FMCG (0.5% 2016 in value versus 2015 for FMCG with pet care growing +2.2%).
- Cat and dog food are not only growing in the mass market (1.9% for cat food and +3.1% for dog food - see the previous page), but are growing even more in specialist pet shops. The growth of cat and dog food in pet shops is driven by a double digit growth of stores belonging to chains, whilst traditional pet stores – which are worth 80% of the channel – show a more limited growth.

Source: IRI retail databases; period ending 20 June 2016

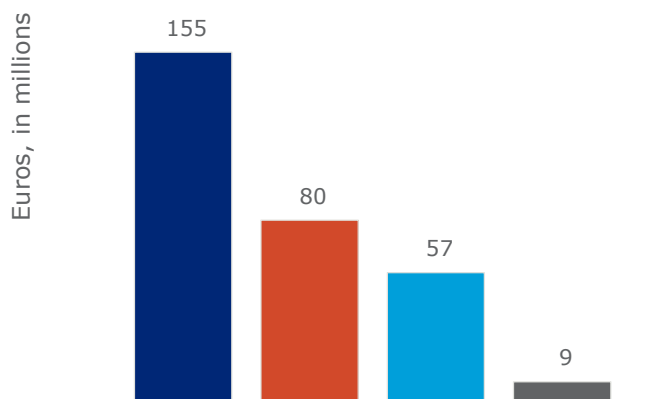


# The Netherlands

## CATEGORY SHARE OF VALUE IN THE LAST YEAR



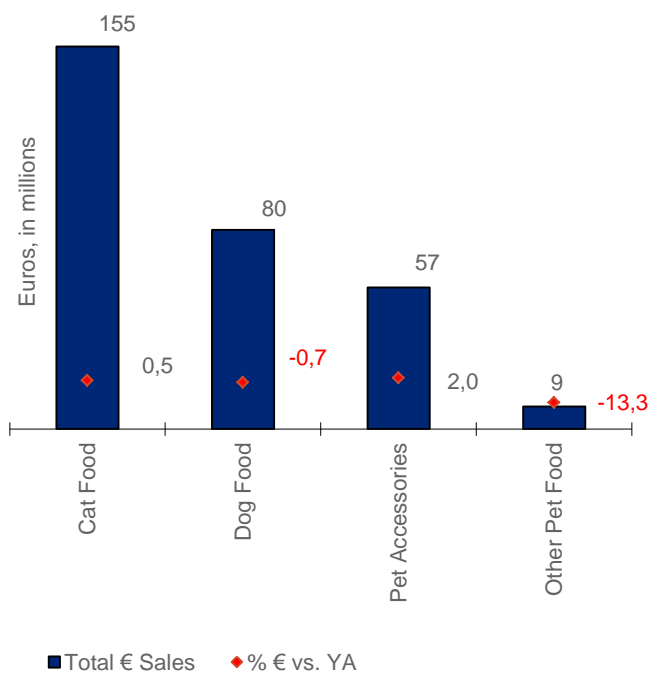
## CATEGORY VALUE SALES IN THE LAST YEAR



■ Cat Food ■ Dog Food ■ Pet Accessories ■ Other Pet Food

## TOP 5 CATEGORIES: EVOLUTION

Value sales (€) and % change versus a year ago



## KEY FINDINGS

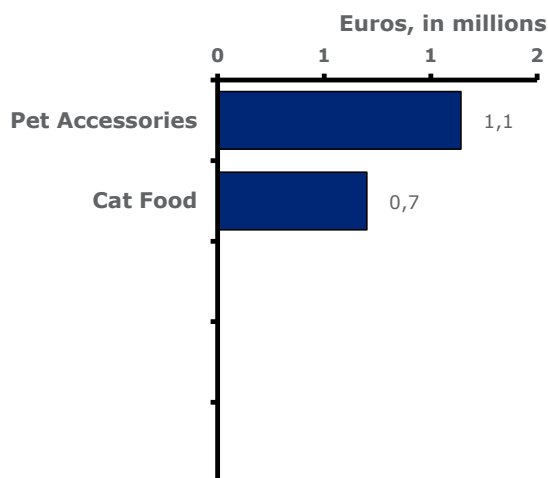
- The largest market is supermarkets and they have increased in value by 0.5% due to cat food. Drugstores are under pressure, with losses in value of 12.5%.
- The biggest category cat food keeps increasing (in total supermarket and drugstores) by +0.5% and so do pet accessories, by +2.0%. Dog food and other pet food are decreasing. In volume all categories are under pressure, cat food is at -2.9% and dog food at -2.7%.
- Cat food remains the biggest category in pet care with a share of 51.3%.
- The decline for total pet food can be, for a part, due to the fact that online purchasing has become a bigger channel for these kinds of products.
- Two specific groups are showing a big growth in value: frozen dog food (+7.0%) and shew bones for dogs (+5.8%). Consumers are not only aware of what is healthy for themselves but also for their pets.

Source: IRI retail databases; period ending 20 June 2016

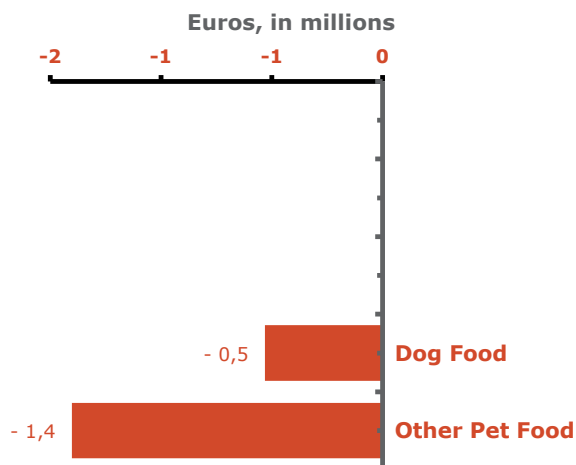


## The Netherlands

### TOP WINNERS: VALUE SALES CHANGE VERSUS A YEAR AGO (€)



### TOP LOSERS: VALUE SALES CHANGE VERSUS A YEAR AGO (€)



### CATEGORY KEY FACTS

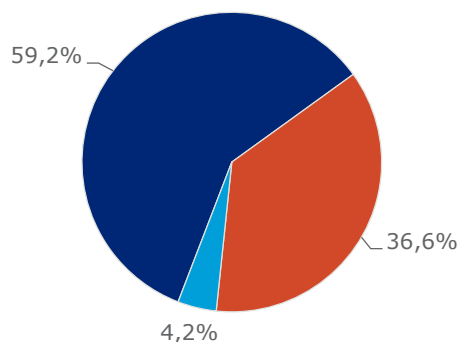
- The Dutch market for pet food shows a decrease in volume sales of 2.0%.
- The biggest positive contributor to the performance of pet care across the Netherlands is pet accessories (1.1 million euros). A negative contribution comes from other pet food (1.4 million euros), more specifically bird seeds show a big decline. A possible explanation could be the fact that autumn and winter in the Netherlands has been less cold than in previous years.
- Within cat and dog food the biggest drivers are wet and dry food. However, for some time now frozen dog food is showing remarkable growth.
- Both dog food (-2.5%) and cat food (-13.9%) show an decrease in value in promotion.
- Private label in pet food has dropped in value share (1.7pt, mainly private label bottom and mainstream products) compared to national brands which have seen an increase (1.7pt).

Source: IRI retail databases; period ending 20 June 2016



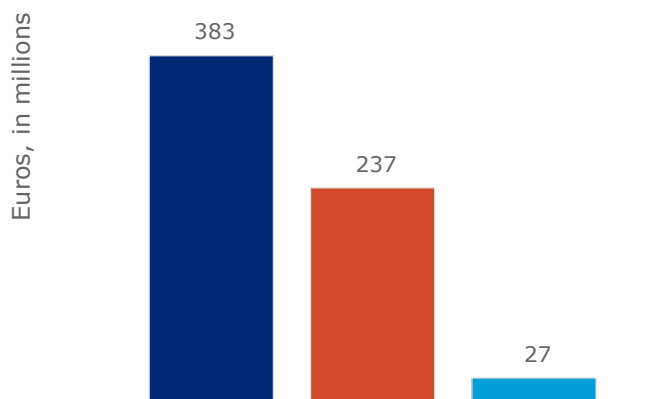
# Spain

## CATEGORY SHARE OF VALUE IN THE LAST YEAR



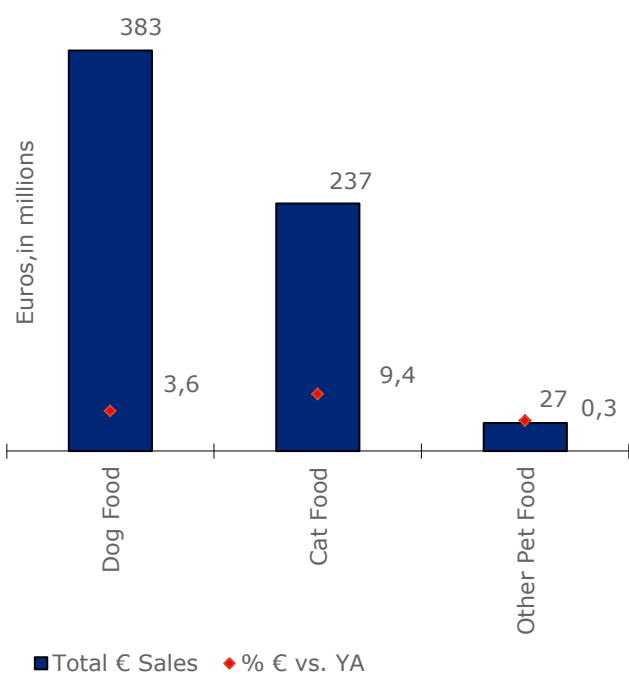
■ Dog Food ■ Cat Food ■ Other Pet Food

## CATEGORY VALUE SALES IN THE LAST YEAR



## TOP 5 CATEGORIES: EVOLUTION

Value sales (€) and % change versus a year ago



## KEY TRENDS

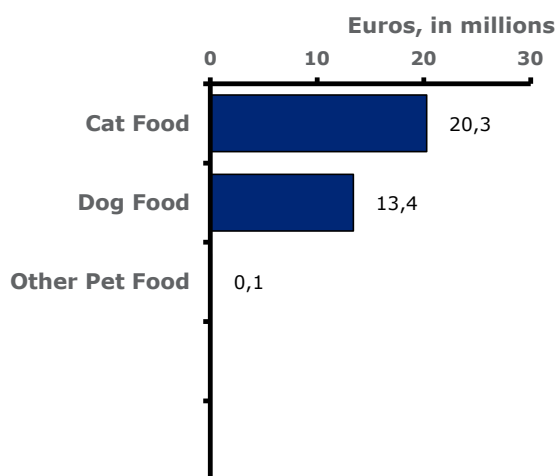
- The total pet food market continued to grow in H1 2016, both in value and volume. The cat segment is still the one that contributes the most to the growth and the dog food category has changed the trend and it is increasing too.
- The dog food segment remains the largest sector in the pet food market with 59.2% of total value sales, while cat food represents 36.6% (+1.3pt versus 2015).
- Dry food (both dog and cat) is the most dynamic segment that explains the positive trends for cat and dog food sales. Snacks for dog food is still growing in volume (+8.7%). Prices for snacks are increasing too (+2.1%).
- All channels are growing, but large supermarkets are the ones that are performing the best. They are the most important channel in FMCG and also for this market. As in 2015 large supermarkets are the ones that have contributed the most to the category in 2016.

Source: IRI retail databases; period ending 20 June 2016

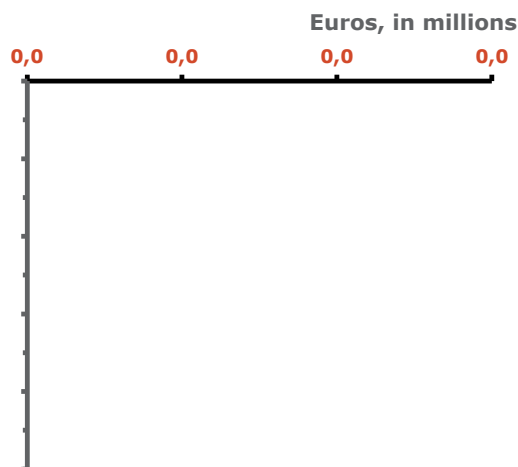


## Spain

### TOP WINNERS: VALUE SALES CHANGE VERSUS A YEAR AGO (€)



### TOP LOSERS: VALUE SALES CHANGE VERSUS A YEAR AGO (€)



### CATEGORY KEY FACTS

- The pet food industry continues its positive trend and has a solid growth both in value and volume. The main players are experiencing a good level of performance even with the general increase in prices and the rise of higher value added products.
- Cat food continues its expansion and dynamism in all channels. It is the main driver for the industry and still has a way to develop itself. Proof of this is that every channel is increasing its assortment.
- Private labels lost market share, especially in dog food, due to the poor performance of the dry segment. Private label for cat food has significantly grown, both in value and volume.
- The specialist channels continue the process of organising themselves to counter the weight of the main retailers, while a fourth channel has emerged: the online shops specialising in pet food and accessories for pets.

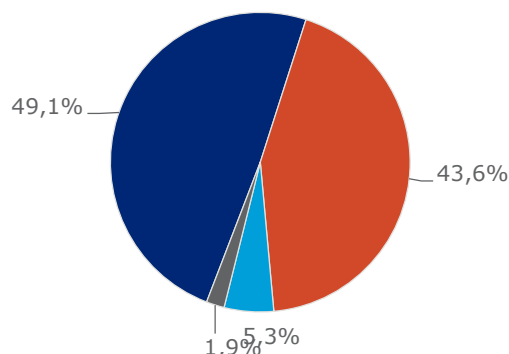
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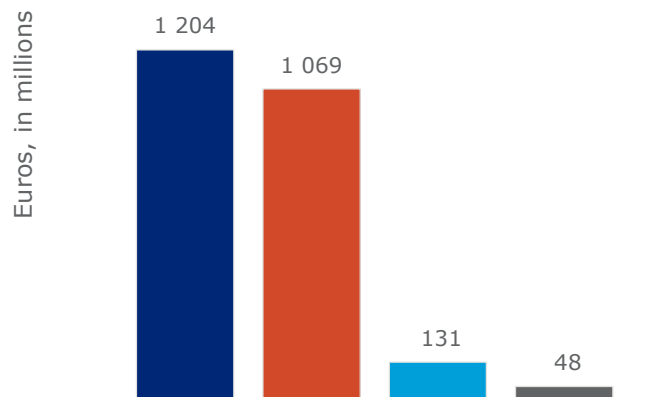


# The United Kingdom

## CATEGORY SHARE OF VALUE IN THE LAST YEAR



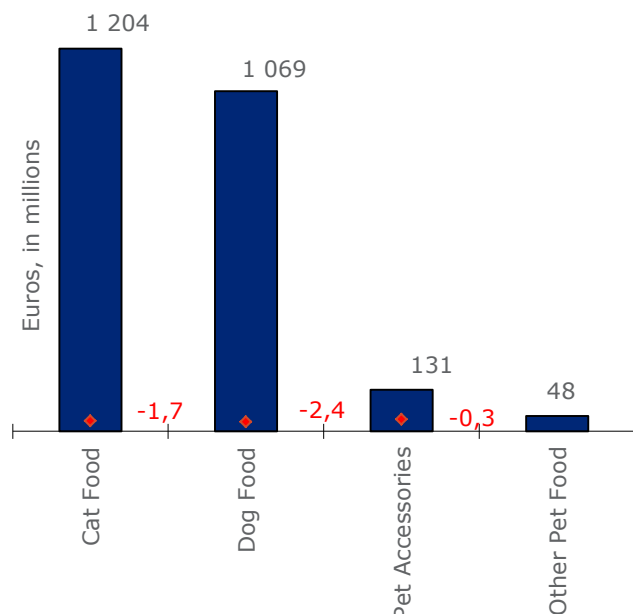
## CATEGORY VALUE SALES IN THE LAST YEAR



■ Cat Food ■ Dog Food ■ Pet Accessories ■ Other Pet Food

## TOP 5 CATEGORIES: EVOLUTION

Value sales (€) and % change versus a year ago



■ Total € Sales ◆ % € vs. YA

## KEY TRENDS

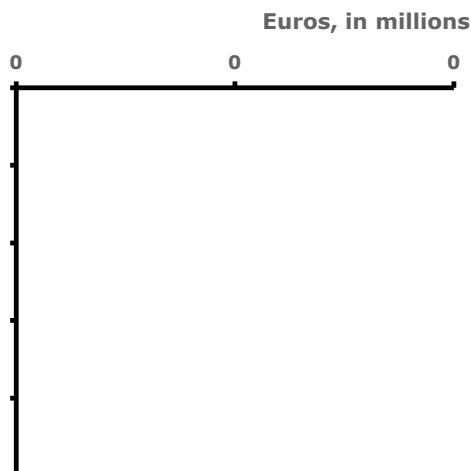
- Pet care declined by 2.1% in value sales during the year ending June 2016. This decline was driven by dog and cat food which had drops of 2.4% and 1.7% respectively.
- Branded cat food drove this sector's decline, falling by 1.8%, whilst private label was static. Dog food declined by 2.4% with branded products decreasing value by 1.3% and private label by 3.6%.
- Other pet food and accessories also had value declines.
- The overall level of promoted volume rose from 43.3% last year to 44.0% this year. Both cat and dog food saw their levels rise to 52.2% and 37.2% respectively.

Source: IRI retail databases; period ending 20 June 2016

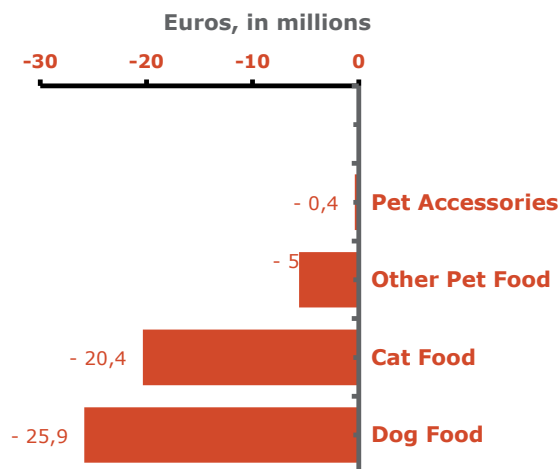


## The United Kingdom

### TOP WINNERS: VALUE SALES CHANGE VERSUS A YEAR AGO (€)



### TOP LOSERS: VALUE SALES CHANGE VERSUS A YEAR AGO (€)



### CATEGORY KEY FACTS

- Within the cat food category the only sectors that showed value growth were the single serve formats which grew by 1.8% and treats growing at 0.4%. The single serve format accounts for 64.6% of value share of cat food and within this sector are the luxury variants (luxury accounts for 26.7% of cat single serve) and this sub sector had value growth of 9.8%.
- Dog food sectors that had value growth during the latest year were the rewarded sectors, with treats growing at 9.7% and chews at 1.0%. The wet sector - which accounts for 41.0% of dog food - declined by -2.0%.
- The dry food element for both cat and dog food has seen value declines of 3.8% and 6.7% respectively, though volume declines have been slower at 2.8% and 3.3% respectively.
- In the UK retailers are now rationalising category ranges, but the overall pet food category has seen an increase of average items per store selling by +0.7% to 489 items in the latest year. Though not all sectors have seen increases. Notable decreases in range have been canned cat food (decreasing by 16.9%) and dog biscuits by 15.8%. Premium dry pet food has seen their ranges increase, cat by 17.6% and dog by 14.5%.
- As the manufacturers get more competitive the levels of discount have increased for pet food from 18.2% last year to 19.4% this year. This was reflected for cat food from 19.0% to 19.8% this year and for dog food from 17.0% to 18.7% this year.
- New product development (NPD) within pet food - at a sub brand level - has remained low with 1.5% value share of total market last year and 1.6% this year.

Source: IRI retail databases; period ending 20 June 2016

# Final Notes

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## Notes on category definitions for countries

Due to the diverse products found in individual countries across this market, it was necessary to consolidate the available data into the categories in this report. In some cases, it wasn't always possible to align products across all six countries, hence the need to highlight any anomalies in the report. These exceptions are listed below:

### Other pet food

- The UK data in this report only includes bird food, while the other countries include fish food and rodent food.

### Pet accessories

- The UK data in this report only includes cat litter and does not include pet hygiene products, aquarium accessories or pet toys.
- The Spain data in this report does not include this category.
- The Germany data in this report does not include pet toys.

## Resources

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**IRI Analytics Suite** provides global solutions for all strategic marketing needs. It enables retailers and manufacturers to get fast and in-depth category insights and dynamic analysis for identifying growth opportunities, and to measure business impact in term of return on investment, sales and profit. The Analytics Advantage Suite goes from in-store interviews to advanced modelling solutions for marketing mix, media, price and promotion optimisation.

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