Welcome to the Pulse H1 2015 edition for pet. We hope you find it useful. Please do not hesitate to contact us if you have any questions or comments at EU.Marketing@IRIworldwide.com.
About the Report

- This pet report is one of 10 super category reports designed to provide a high-level comparison and analysis of 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, market trends, category shares, and winners and losers for Europe as a whole 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:

<table>
<thead>
<tr>
<th>Country</th>
<th>Channels used</th>
</tr>
</thead>
<tbody>
<tr>
<td>UK</td>
<td>Hypermarkets, supermarkets, drugstores and impulse outlets</td>
</tr>
<tr>
<td>ES</td>
<td>Hypermarkets, supermarkets, hard discounters, and drugstores, in Spain and the Canary Islands</td>
</tr>
<tr>
<td>DE</td>
<td>Hypermarkets, supermarkets, hard discounters and drugstores</td>
</tr>
<tr>
<td>NL</td>
<td>Hypermarkets, supermarkets, hard discounters and drugstores</td>
</tr>
<tr>
<td>IT</td>
<td>Hypermarkets, supermarkets, small self service, hard discounters and drugstores</td>
</tr>
<tr>
<td>FR</td>
<td>Hypermarkets and supermarkets</td>
</tr>
</tbody>
</table>

- For analytical purposes, the data sourced from available retail databases have 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 good news is that pet category has recovered during the current period (12 months ending June 2015). In fact, its value sales growth across Europe in the 12 months ending June 2015 has turned positive again, up 1.1% versus the corresponding period of 2014. This also compares to IRI’s last report (12 months ending December 2014) where value sales declined 0.4%. Even if pet care category performance is far from its past growth levels, its trajectory is slightly better than general fast-moving consumer goods (FMCG) trends. The value sales increase of pet care correlates with an increase in prices, while volume sales are generally decreasing. Different trends coexist across the countries: single serve products are growing within low priced brands and private label.

### ECONOMIC FIGURES INFLUENCING CONSUMER BEHAVIOR

<table>
<thead>
<tr>
<th></th>
<th>Population in Millions</th>
<th>Unemployment (%)</th>
<th>Average 12 Months Inflation Rates</th>
<th>GDP in Millions (€)</th>
</tr>
</thead>
<tbody>
<tr>
<td>France</td>
<td>65.8</td>
<td>66.3</td>
<td>10.3</td>
<td>10.2</td>
</tr>
<tr>
<td>Germany</td>
<td>80.7</td>
<td>81.1</td>
<td>5.0</td>
<td>4.7</td>
</tr>
<tr>
<td>Italy</td>
<td>60.7</td>
<td>60.7</td>
<td>12.7</td>
<td>12.7</td>
</tr>
<tr>
<td>Netherlands</td>
<td>16.8</td>
<td>16.9</td>
<td>7.4</td>
<td>7.0</td>
</tr>
<tr>
<td>Spain</td>
<td>46.5</td>
<td>46.4</td>
<td>24.5</td>
<td>26.6</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>64.3</td>
<td>64.7</td>
<td>6.1</td>
<td>5.6</td>
</tr>
</tbody>
</table>

Source: Eurostat, June 2015
GLOBAL TRENDS

TOTAL PET VALUE SALES AND % CHANGE VERSUS PRIOR YEAR

VALUE SALES IN MILLIONS (€)

<table>
<thead>
<tr>
<th></th>
<th>Total EU</th>
<th>UK</th>
<th>DE</th>
<th>FR</th>
<th>IT</th>
<th>ES</th>
<th>NL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total EU</td>
<td>8,774</td>
<td>2,425*</td>
<td>2,114</td>
<td>2,075</td>
<td>1,272</td>
<td>583</td>
<td>306</td>
</tr>
</tbody>
</table>

*based on an exchange rate of €1.27 to the pound

TOTAL EUROPE +1.1%

TOTAL PET VALUE SALES FOR THE LAST SIX YEARS ENDING

Source: IRI retail databases; period ending 28 June 2015
Europe

**CATEGORY SHARE OF VALUE SALES IN THE LAST YEAR**

- Cat food: 50.3%
- Dog food: 36.8%
- Pet accessories: 9.6%
- Other pet food: 3.3%

**CATEGORY VALUE SALES IN THE LAST YEAR**

- Cat food: €4,411 million (1.4%)
- Dog food: €3,230 million (0.3%)
- Pet accessories: €839 million (2.1%)
- Other pet food: €294 million (1.8%)

**TOP 5 CATEGORIES: EVOLUTION**

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

**KEY TRENDS**

- The value of the European market increased again across the six countries in the year ending Q2 2015 by 1.1%. This is an important change versus the negative results shown in the prior report.
- Five out of the six countries are experiencing an increase in sales with the only the Netherlands displaying a negative trend (-0.6%). Italy is the best performer (2.5%) with Spain being second (1.9%).
- From a European perspective, cat food is the core business of pet care (accounting for 50.3% of the category) and shows visible growth (1.4%) that influences the category’s overall performance. Dog food is stable, whilst other pet food and accessories show a positive trend of around 2% growth.

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

Source: IRI retail databases; period ending 28 June 2015
TOP WINNERS: VALUE SALES CHANGE VERSUS A YEAR AGO (€)

<table>
<thead>
<tr>
<th>Category</th>
<th>Change in Value Sales (£)</th>
<th>Euros, in millions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cat Food</td>
<td>60.7</td>
<td></td>
</tr>
<tr>
<td>Pet Accessories</td>
<td>17.5</td>
<td></td>
</tr>
<tr>
<td>Dog Food</td>
<td>11.1</td>
<td></td>
</tr>
<tr>
<td>Other Pet Food</td>
<td>5.1</td>
<td></td>
</tr>
</tbody>
</table>

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

CATEGORY KEY FACTS

- The greatest contributor to the performance of pet care across Europe is cat food (£60.7 million) followed by pet accessories (£17.5 million). Dog food and other pet food also give positive contributions.
- The dog snacks and treats segment is becoming increasingly significant due to its growth in value and volume in all European countries.
- Wet cat single serve and, to a lesser extent, dry cat food are confirmed to be 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 introduced some years ago, as innovation, no breakthrough concepts or innovations have entered the market.
- In these tough economic times, private label is growing across most of the markets, and represent a cheaper but more acceptable alternative compared to major brands, which generally react to an increase in promotions.
- Pet care appears to be an increasingly polarized category. Economy products are growing, (private label and low priced brands) as well as premium products in small sizes. 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 the shopper behaves differently from category to category.
- Pet care continues to become more competitive for branded products due to the growth of private label and increased promotional activity.

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

Source: IRI retail databases; period ending 28 June 2015
France

### CATEGORY SHARE OF VALUE SALES IN THE LAST YEAR

- Cat Food: 47.4%
- Dog Food: 30.4%
- Pet Accessories: 16.7%
- Other Pet Food: 5.4%

### CATEGORY VALUE SALES IN THE LAST YEAR

- Cat Food: Euro 984m
- Dog Food: Euro 632m
- Pet Accessories: Euro 347m
- Other Pet Food: Euro 112m

**TOP 5 CATEGORIES: EVOLUTION**

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

- Cat food: Euro 984m, +1.3%
- Dog food: Euro 632m, -0.5%
- Pet accessories: Euro 347m, +1.8%
- Other pet food: Euro 112m, +3.2%

**KEY TRENDS**

- Growth is still mainly driven by cat food. Wet cat food growth has become essentially flat (0.2%), whereas dry cat food continues to exhibit dynamic growth (1.7%).
- Snacks and treats is the fastest growing category. Cat snacks and treats (10.4%) grew through assortment development, but dog care and treats underperformed (1.8%).
- Growth in the cat population had a positive impact on cat food and pet accessories, due to cat litter (4.0%).
- Other pet foods show a positive performance, but only bird food has grown (10.2%).
- The dog food trend was positive for the second quarter in a row after several quarters of negative trends. Wet food growth remains negative (-2.2%), whereas dry food is flat (0.4%), due to care and treats good performance (1.8%).

Source: IRI retail databases; period ending 28 June 2015
Top Winners: Value Sales Change Versus a Year Ago (€)

- Cat food: €12.7 million
- Pet accessories: €6.3 million
- Other pet food: €3.5 million

Top Losers: Value Sales Change Versus a Year Ago (€)

- Dog food: -€3.4 million

Category Key Facts

- Cat food is the main contributor to market value sales growth, generating approximately €13 million in new sales. With the exception of multi-serve, all cat food sectors are positive:
  - Dry cat: 1.7%
  - Single serve wet cat: 3.9%
  - Snacks cat: 10.4%
- Pet food volume sales are increasing, driven by an SKU range increase (1.5%).
- The assortment in pet food is increasing in each segment, with the exception of wet dog food. This trend proves how strategic this category continues to be for retailers, particularly with the development of the value offer.

Source: IRI retail databases; period ending 28 June 2015
**KEY TRENDS**

- Pet care in Germany has reported an overall growth of 1.0% in value sales driven by growth in dog food, cat food, cat litter and hygiene small animal / rodent categories. Growth is due to increase in both normal and promotional sales, along with increases in price.

- Marginal value growth in cat food is driven by branded players such as Nestle Purina and Vitakraft. However, private label is declining by 0.8%.

- Drugstores and all hypermarkets are the only channels showing growth for cat food.

- Dog food has grown in value sales driven by branded products, Mars, Vitakraft and Nestle Purina, while private label sales have remained flat.

- Pet accessories is showing growth mainly due to growth in cat litter (1.8%) and hygiene small animal / rodents (1.0%). Cat litter has also grown in volume sales by 2.3%.

- Other pet food is declining across all the sub-categories of fish food, bird food and small animal feed / rodents.

**TOP 5 CATEGORIES: EVOLUTION**

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

- Cat food: 1,210 (increase by 0.7%)
- Dog food: 676 (increase by 1.2%)
- Pet accessories: 159 (increase by 1.6%)
- Other pet food: 69 (decrease by 1.7%)

Source: IRI retail databases; period ending 28 June 2015
**CATEGORY KEY FACTS**

- Cat food, which contributes more than 50% value sales to the category, has grown in hypermarkets, drugstores and discount stores due to growth in both normal and promotional value sales. The rate of value sales across all of the channels has accelerated due to increase in shelf space and overall increases in both normal and promotional prices.

- Among pack types, a significant increase in value sales by 47.3% in pouch packs, followed by aluminum dish single packs (2.9%), is leading to overall growth in cat food. Cat snacks and cat beverages are helping overall growth in cat food.

- Dog food’s growth among the channels - hypermarkets, drugstores, hard and soft discounters - is driven by both normal and promotional sales. Increase in shelf space and overall prices have contributed to value sales growth.

- Pet accessories has the highest growth due to cat litter sales, followed by hygiene small animal / rodents. Cat litter has seen growth from both hard and soft discounters with increased sales clearly occurring as a result of normal sales. Private label is the only driver for growth in cat litter, growing by 4.7%.

- Hygiene small animal / rodents has seen growth from normal sales and price. National brands were able to gain significant value sales. They did markedly better in hypermarkets and drugstores.

- Total other pet food value sales declined by 1.6%, with all sub-categories declining. Small animal feed / rodents is the largest contributor to the segment, which has declined by €316.2k.

- A significant decline in shelf space, increase in prices and lack of promotions is leading to overall declines in the other pet food segment. Private label small animal feed / rodents had marginal increases in value sales, which could not offset the total decline from fish food and bird food.

*Source: IRI retail databases; period ending 28 June 2015*
**TOP 5 CATEGORIES: EVOLUTION**
Value sales (€) and % change versus a year ago

<table>
<thead>
<tr>
<th>Category</th>
<th>Total € Sales (€)</th>
<th>% vs. YA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cat food</td>
<td>668</td>
<td>2.4</td>
</tr>
<tr>
<td>Dog food</td>
<td>428</td>
<td>2.2</td>
</tr>
<tr>
<td>Pet accessories</td>
<td>151</td>
<td>4.6</td>
</tr>
<tr>
<td>Other pet food</td>
<td>-158</td>
<td>-4.1</td>
</tr>
</tbody>
</table>

**KEY FINDINGS**

- Total cat and dog food saw growth in value sales in the year ending June 2015 greater than 2% (2.4% for cat food and 2.2% for dog food), but volumes cannot keep up and are decreasing. Value sales growth of cat and dog food comes from increasing prices.

- Cat food remains the largest sector of the category, standing for 52.6% of total value sales, with dog food representing 33.8%. The pet accessories category remains definitely on a positive growth path (4.6%) whilst other pet food is experiencing a relevant loss in value sales (-4.1%).

- Dry pet food continues to outperform wet pet food, at least for cat food. Wet single serve keeps driving the increase of cat food with a growth of 3.7% in value sales, and dog food confirms a positive value trend for wet small and medium products (3.3%).

- Snacks and treats remains the fastest growing segment of the category, especially for cat (26.4% in value sales), but also for dog food (9.0% in value sales).

Source: IRI retail databases; period ending 28 June 2015
**CATEGORY KEY FINDINGS**

- The main contribution to the growth of the pet care category comes from cat food, with a €16.0 million increase in sales. The growth of dog food is also relevant, with a €9.1 million increase in sales. The pet accessories segment is also positive, contributing €6.7 million to the sales growth of the pet care category.

- Products in small packages continue to drive market growth, especially in cat food. This confirms that there is a cluster of shoppers that buys premium products (with user-friendly packages and special tastes) and that they are not affected by the still difficult economic environment.

- The increased attention to pets’ health is reflected in the considerable growth of the dog functional snack and treats segment (oral care, for instance). Cat snack and treats is still a niche market, showing an attractive potential for growth.

- The other pet foods category still continues to suffer weakness in value sales, being the only negative contributor to pet care. All segments are declining (birds, fish & turtles and rodents). A decline in the range at shelf availability is also apparent.

- Promotions and private label matter a lot in pet care: the percent of promoted volumes in pet food reached 27.5%, with growth of 0.7 points versus the corresponding period in 2014. Private label shows a high but declining volume market share: 39.7%, but down by 3.3 points versus 2014.

- Pet food (cat food and dog food) is a category that has resisted the consumption downturn of recent years, and still is growing far above the average FMCG (0.8% in value during the year ending July 2015 versus 2014). The growth of pet food in value sales (2.2%) however, is accompanied by a decline in volume (-1.3%).

- Pet food continues to grow in Italy, with both premium products and low-priced brands growing. It would be wrong to say that brand loyalty is decreasing; shoppers are, however, increasingly looking for sales on their preferred brands. Shoppers look for quality, stocking up with their preferred brands; this results in shoppers visiting more shops/channels than before to find the best price for value.

Source: IRI retail databases; period ending 28 June 2015
The Netherlands

**TOP 5 CATEGORIES: EVOLUTION**
Value sales (€) and % change versus a year ago

<table>
<thead>
<tr>
<th>Category</th>
<th>Value Sales (€)</th>
<th>% change vs. YA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cat food</td>
<td>156</td>
<td>0.2</td>
</tr>
<tr>
<td>Dog food</td>
<td>85</td>
<td>-2.3</td>
</tr>
<tr>
<td>Pet accessories</td>
<td>55</td>
<td>-0.4</td>
</tr>
<tr>
<td>Other pet food</td>
<td>11</td>
<td>0.1</td>
</tr>
</tbody>
</table>

**KEY FINDINGS**

- The Dutch pet food market shows slightly negative sales growth. There has been a positive change for cat food, partially due to growth at the biggest retailer in the Netherlands, with (wet) cat food sales increasing by 5.1%.
- Cat food gained in category share, now totalling 51.0% and stays the largest segment within pet food.
- Dog food is facing more difficulties as volume based on promotion grows from 8.3% to 10.6%.
- The frozen dog food segment keeps growing versus last year, with 13.9% growth in value sales. This is an excellent opportunities for retailers, as drugstores and hard discounters do not list frozen dog food items.
- Drugstores are under pressure in both dog (-33.9%) and cat food (-32.2%). These declines are partially caused by in/out promotional activities in 2014.

Source: IRI retail databases; period ending 28 June 2015
The Netherlands

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

0 0 0 0 0
Cat food

Other pet food

0.3

TOP Losers: Value Sales Change versus a Year Ago (€)

-3 -2 -1
Euros, in millions

Pet accessories

- 0.2

Dog food

- 2.0

CATEGORY KEY FACTS

• The Dutch market for pet food shows a decrease in volume sales of 1.3%.

• The biggest positive contributor to the performance of pet care across the Netherlands is cat food (€0.3 million). A negative contribution comes from drugstores, (€1.8 million) which have a hard time keeping sales up in pet food.

• Within cat food and dog food the biggest drivers are wet and dry food. However, for some time now frozen dog food has shown remarkable growth.

• Both dog food (2.3 points) and cat food (2.8 points) show an increase in volume in promotion.

• Private label in pet food drop (1.5 points) in value share versus national brands increase (1.5 point).

• Low-end retail (supermarkets and other retailers with low-priced pet food) and online channels are up-and-coming markets in the Netherlands for these categories.

Source: IRI retail databases; period ending 28 June 2015
Spain

**TOP 5 CATEGORIES: EVOLUTION**
Value sales (€) and % change versus a year ago

- **Category Share of Value Sales in the Last Year**
  - Dog food: 60.0%
  - Cat food: 35.4%
  - Other pet food: 4.6%

- **Category Value Sales in the Last Year**
  - Total € Sales:
    - Dog food: 349
    - Cat food: 206
    - Other pet food: 27

**KEY TRENDS**

- In the year ending June 2015, the total pet food market experienced further growth, 1.9% in value sales.
- Cat food noticeably increased its value sales by 4.3%, reaching 35.4% value share of the market. Dog food (up 0.7% in value sales) is still the main contributor, with a 60.0% share of the market. The remaining 4.6% belongs to food for other pets and is losing sales (-1.0%).
- As more consumers move to smaller houses and cats adapt to long workdays, the preference to choose a cat over other pets has grown. The increase in people owning cats directly translates to increased cat food sales.
- The slowdown in dog food sales still continues due to the replacement of large dogs for smaller ones, however the preference for higher value-added products still is a trend that has an impact on prices. The category has launched product focused on small dogs (“Mini” ranges, food specialized in small breeds). Royal Canine has launched a new range of products (“Urban life”) specialized in urban dogs, which are reported to fight stress.

Source: IRI retail databases; period ending 28 June 2015
Spain

**CATEGORY KEY FACTS**

- The value of the category increases due to the price rise and shopper’s preference for products with higher value. During this period, even private label manufacturers have developed premium pet food products.

- Buying pet food online is an increasing trend in the Spanish market. Online price comparison tools have emerged to help buyers choose between online suppliers, like Krokprices.com (May 2015).

- The category has performed product launches focused on small dogs (‘Mini’ range of products or food specialised in small breeds).

- All cat food segments increased sales, especially for dry food.

- As has happened in other FMCG categories, private label in cat food experienced a slowdown in sales. This calls attention to the fact that consumers have begun to prefer national brand products to feed their cats.

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

- Cat food: 8.5 Euros, in millions
- Dog food: 2.5 Euros, in millions

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

- Other pet food: -0.1 Euros, in millions

Source: IRI retail databases; period ending 28 June 2015
The United Kingdom

**CATEGORY SHARE OF VALUE SALES IN THE LAST YEAR**

- Cat food: 48.9%
- Dog food: 43.7%
- Pet accessories: 5.2%
- Other pet food: 2.1%

**CATEGORY VALUE SALES IN THE LAST YEAR**

- Total Euro Sales: €1,186 million
- Cat food Euro Sales: €1,060 million
- Pet accessories Euro Sales: €127 million
- Other pet food Euro Sales: €52 million

**TOP 5 CATEGORIES: EVOLUTION**

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

**KEY TRENDS**

- Pet care value sales grew by 0.7%. The growth was driven by cat food (1.3%), whereas dog food declined by 0.3%. The minor sectors, such as pet accessories and other pet food, also enjoyed value sales growth of 1.8% and 8.7%, respectively.

- Branded products grew by 0.7%, but private label only grew by 0.3%. As a result, their share fell from 18.5% (2014) to 18.4% this year.

- Both branded cat and dog food products grew by 0.7%. Private label cat food grew by 6.6%, but private label dog food declined by 3.9% in value sales.

- Levels of promotional volume dropped from 45.0% in 2014 to 43.4% in 2015. This was reflected in cat food, which was 54.8% in 2014 and 51.7% in 2015. Dog food levels fell slightly, from 37.0% to 36.5%.

- With value sales growing at 0.7%, units stagnating at 0.0% and volume declining at 1.9%, this suggests that the market is moving toward smaller, more expensive packs.

Source: IRI retail databases; period ending 28 June 2015
**CATEGORY KEY FACTS**

- Pet care value growth is being generated from the premium areas of the category.
- In cat food, the fastest growing sectors are wet cat single serve premium products, which have seen year-on-year growth of 18.6%. This subsector accounts for 24.7% of value sales of total wet cat single serve products. The price per kilogram (kg) of these products is 77.7% more expensive than the standard single serve.
- Although cat treats have seen a 1.0% drop in price per kg, at present these are 566% more expensive than the cat food category.
- Premium dry cat food, which is aimed at pets that have veterinary problems, etc., had modest value sales growth of 0.3%, but is more than twice as expensive as the standard products (114.0%).
- As with cat, premium dog food sectors also saw substantial growth. Dog treats recorded value growth of 12.4% this year and saw its average price per kg increase by 2.8%.
- Premium dry dog food, aimed at pets with veterinary problems, had a similar increase in value sales of 12.3%, and also saw a price per kg increase by 5.7%. On average, the products were 121% more expensive per kg than the standard offering during the latest year.
- At an SKU level, last year’s new product development (NPD) contributed 3.8% to value sales. NPD has now contributed 12.6% to this year’s value sales for total pet food. This year’s NPD value contribution has only been 3.4%.
- For cat food, the figures were 3.8% of value sales last year, contributing 13.7% this year. This year’s NPD contributed 4.1% for total cat food value sales.
- For dog food, the figures were 3.9% last year, contributing 11.3% this year, and this year’s NPD had value sales share of dog food of 2.8%.

Source: IRI retail databases; period ending 28 June 2015
Final Notes

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. Those exceptions are listed below:

Other pet food
- The UK datasets in this report only include bird food, while the other countries include fish food and rodent food.

Pet accessories
- The UK datasets in this report only include cat litter and does not include pet hygiene products, aquarium accessories or pet toys.
- The Spain datasets in this report do not include this category.
- The Germany datasets in this report do not include pet toys.
To gain insight into opportunities across specific categories, segments, channels or retailers, contact your IRI client service representative regarding custom analyses leveraging the following resources:

- **IRI InfoScan Census®** is a syndicated retail tracking service that enables manufacturers and retailers to acquire industry insights used to make better business decisions. IRI InfoScan Census utilizes the data that IRI collects from grocery, drug, and mass merchandise retailers to provide the most comprehensive and accurate syndicated data offering in the FMCG sector. With access to accurate, granular detail by category, geography, measure and time period, clients have the tools needed to develop marketing and sales strategies based on product performance, distribution, and promotion responsiveness. All datasets about pet comes from IRI InfoScan Census.

- **IRI Consulting** provides strategic insights and advice, leveraging a variety of data sources, predictive analytics, enabling technologies, and business analyses to help FMCG manufacturers and retailers address significant sales and marketing issues effectively.

**FOR MORE INFORMATION**

Please contact Paolo Garro, Business Insights Director, IRI at Paolo.Garro@IRIworldwide.com or +39 02 52.579446 with questions or comments about this report.

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