

The Grocer

Focus On: Petcare by Ellis Hawthorne (Ellis.Hawthorne@wrbm.com)

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The Story

Innovative, super premium products are in growth as a growing portion of society treat their pets more like people. In the past year, we've seen soups, cakes and a host of other launches hit the market. So who's winning in this challenging market as brands have struggled to maintain shelf space and a shift to bulk packs has encouraged cost conscious shoppers to stock up? And what can the strugglers do to turn things?

Trends:

Indulgence: Our research shows that some of the fastest growing petcare brands at present are those that offer animals more indulgent treats and meals. Who are these brands? How do their prices compare to more standard offerings? How are they managing to attract pet owners? And how are they reconciling their indulgent credentials with the health question?

Range rationalization: This feature will include Brandview analysis on how ranges have been rationalized over the past year in order to make the fixture easier to navigate. Which brands have benefited from this trend? Who's been hit the hardest? And what are players doing to justify their space on shelf in this challenging environment?

Wet v dry: There are big discrepancies in the performance of the wet and dry food categories. Why is this? Which brands are driving the growth in wet cat food? What are dry brands doing to turn things around? Are any dry brands defying the downturn in dry food?

Health: As it is in human food, health considerations are of growing importance for pet owners when it comes to choosing petcare. Which health considerations are of most importance to pet owners? Which brands and types of food (and treat) are capitalizing on health concerns? How? Are any brands capitalizing on demand for more 'natural' pet foods?

Treats: A year ago this was the fastest growing sector in the category; now sales are flat. Why? This feature will pay close attention to the factors behind this slow down. Is a reliance on promotions to shift volume devaluing the sector?

Retailers and own label: This feature will pay close attention to how different retailers are approaching the category, in terms of their own label and branded ranges, merchandising, price, promotions and so on. Own label is struggling at present. Why is this? How have retailers' ranges changed in the past year?

Advertising and marketing: This feature will also investigate how the marketing and advertising strategies of the category's biggest players have evolved over the past year and how they will develop in the coming year to sustain growth or return brands to growth.

Innovation: Key to this feature will be a discussion of the latest NPD from the category's brands and own label players, large and small. The feature will explore the market trends that have inspired these innovations and weigh up which new launches are most likely to encourage new trends in the market. We will profile eight of the most interesting new launches in a separate innovation panel.

Key questions the feature is likely to address:

- What consumer trends have impacted the category over the past year?
- How have promotional strategies (both in terms of price and marketing) evolved?
- How have individual retailers' strategies impacted the market?
- How has merchandising changed in the market?
- What impact has own-label had on branded players?
- What's next for the category?