

Pet Market Overview

Indie Pet Reception

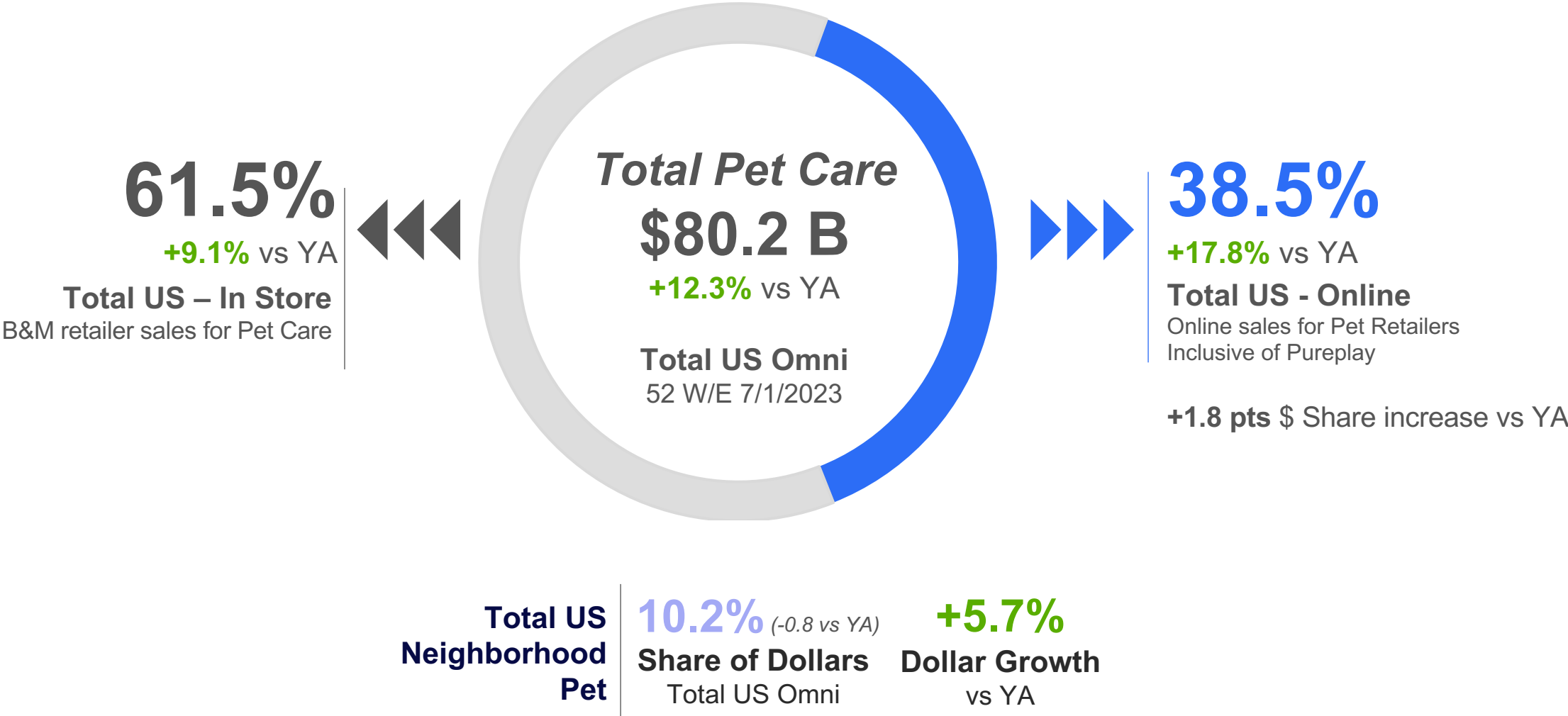
August 2023



NielsenIQ

Pet Care growth driven by both In Store & Online retailers, Online growth outpacing In-store

Neighborhood Pet represents about 10% of Pet Care sales and grew dollars +5.7% vs YA

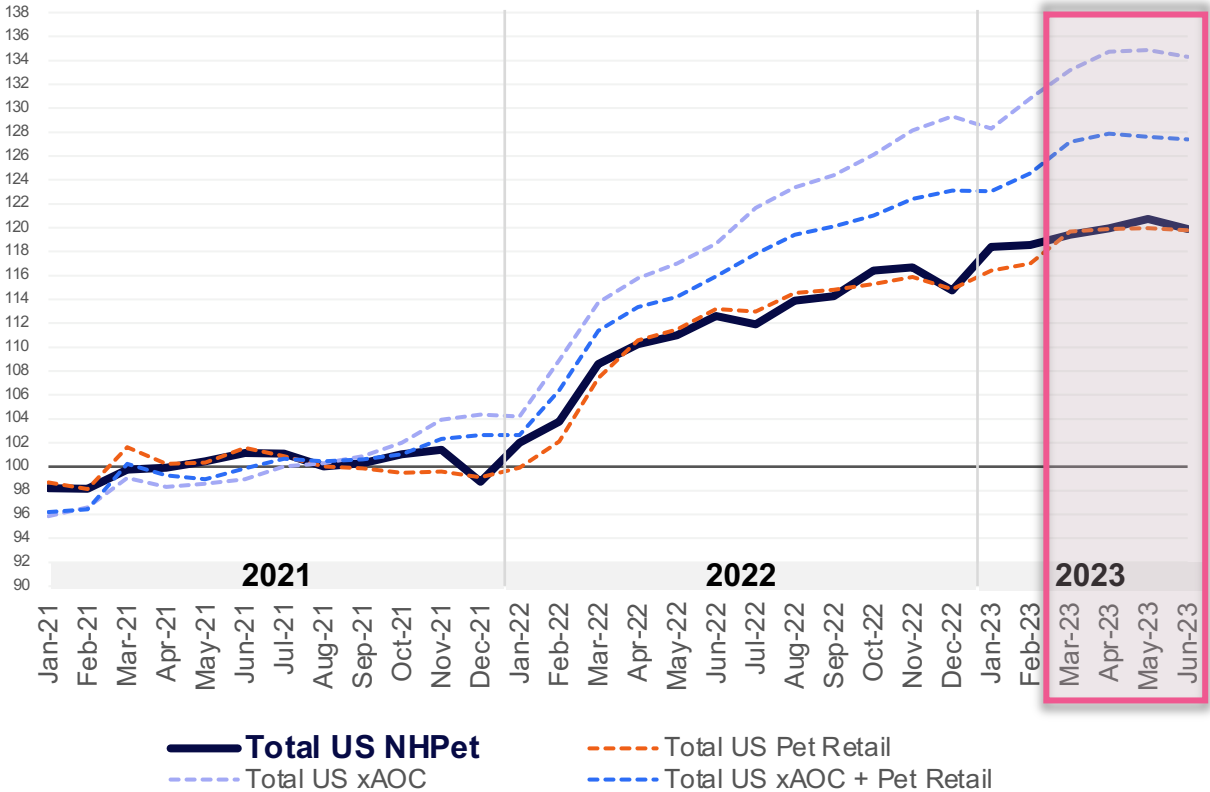


Source: NIQ Omnisaes & Scan Data; Pet Care Dept, latest 52 W/E 7/1/2023 vs YA

Overall inflation in Pet Care has continued to rise

Monthly price trend have flattened in recent months for both Neighborhood and Conventional Pet

NIQ Monthly Price Index to 2021 Total Price Pet Care Department



Source: NielsenIQ Scan Data, 30 Months Ending June 2023

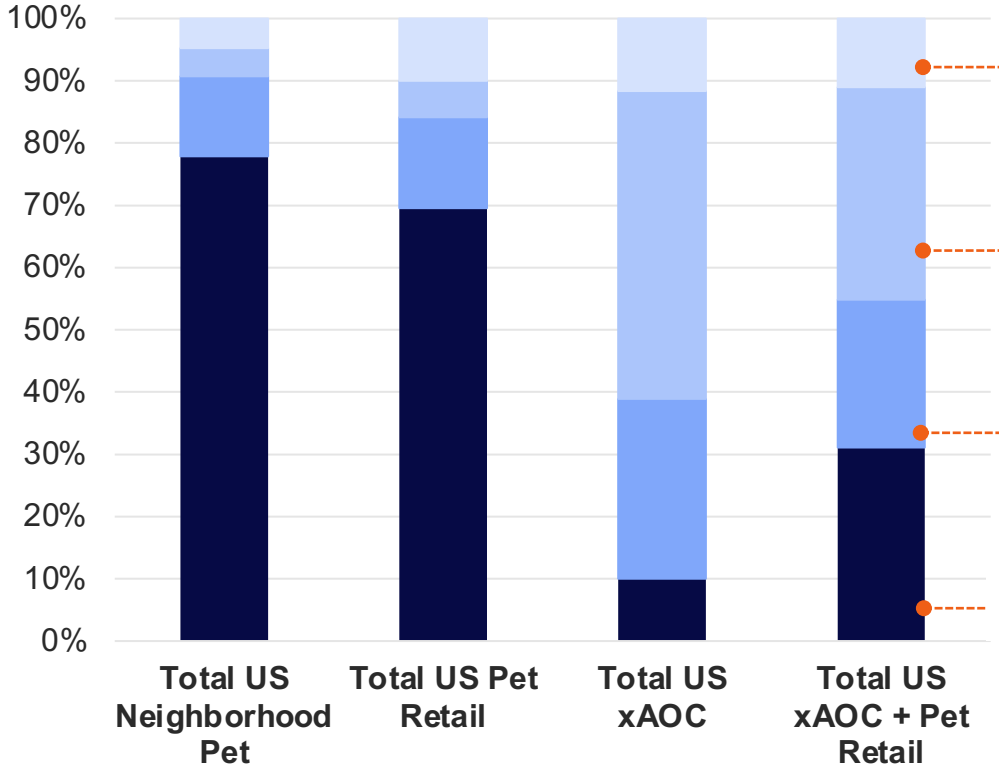
According to the Bureau of Labor Statistics, Price increased **+9.0% for Pet Products** thru June 2023;

Outpacing both *Food At Home* and *Food Away from Home*.

Source: U.S. Bureau of Labor Statistics - Consumer Price Index June Release (released July 12, 2023)

Pet Consumables - EQ Unit Growth for private label and Middle tier brands

Sales Contribution by Brand Price Tier



Growth Rates by Brand Price Tier

	\$ % Chg vs LY	EQ % Chg vs LY
Private Label		
Total US Neighborhood Pet	32.5%	26.4%
Total US Pet Retail	15.4%	8.1%
Total US xAOC	22.6%	1.7%
Total US xAOC + Pet Retail	20.2%	3.0%
Value		
Total US Neighborhood Pet	1.0%	-11.9%
Total US Pet Retail	7.5%	-11.7%
Total US xAOC	13.2%	-1.8%
Total US xAOC + Pet Retail	12.8%	-2.5%
Middle		
Total US Neighborhood Pet	6.8%	2.4%
Total US Pet Retail	8.7%	1.5%
Total US xAOC	18.2%	-0.2%
Total US xAOC + Pet Retail	16.0%	0.1%
Premium		
Total US Neighborhood Pet	8.5%	-4.4%
Total US Pet Retail	10.2%	-0.7%
Total US xAOC	18.1%	2.7%
Total US xAOC + Pet Retail	11.8%	0.1%

Source: NIQ Scan Data, Latest 52 WE 7/1/2023`

Thank you

Questions? We'd love to meet you at NIQ **Booth #5762**