

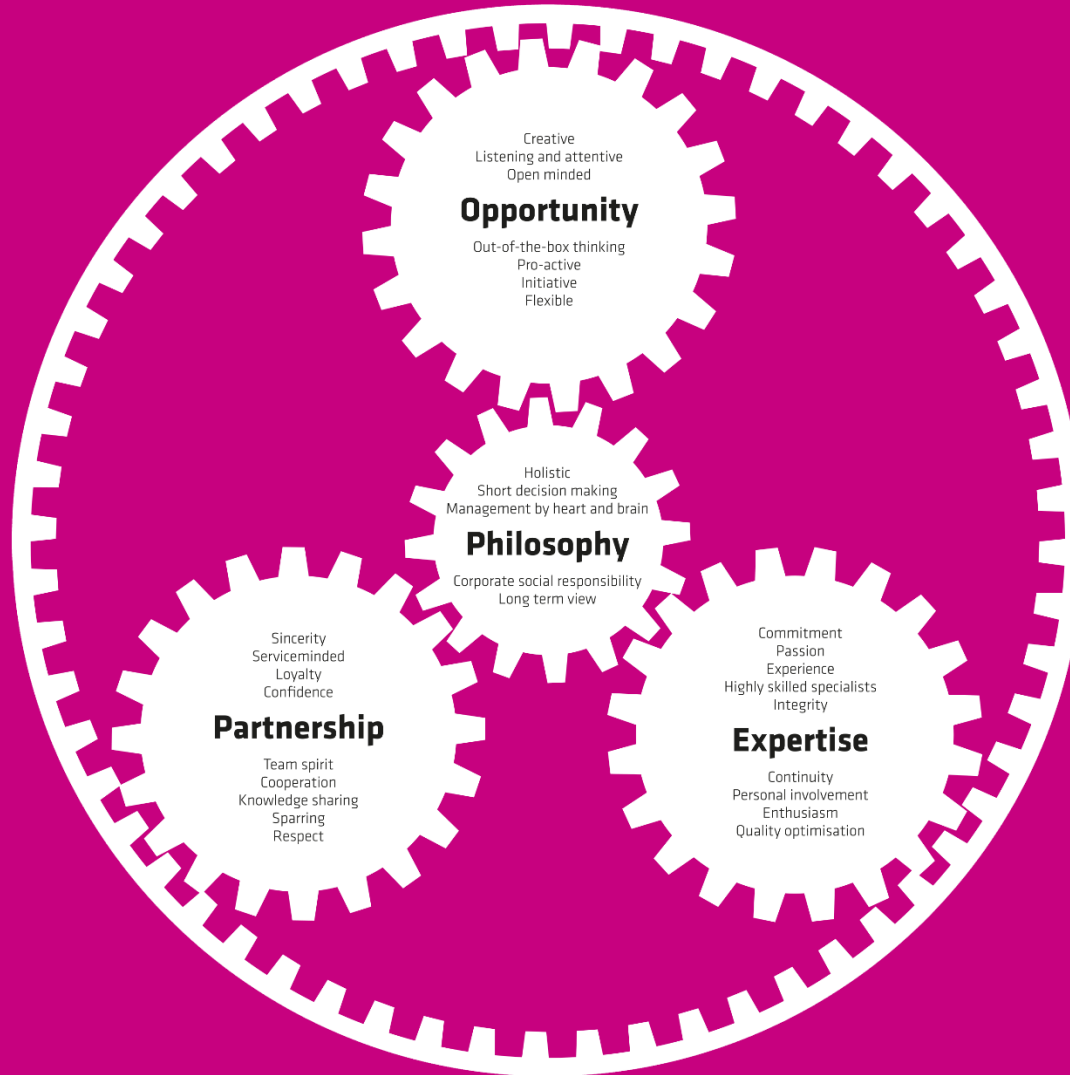
The Russian pet food market behind the statistics

By CEO & Owner Henriette Bylling





The Aller Petfood Drive



Presentation flow





The Cat population



20 mil cats

Source: Euromonitor



30 mil cats

Source: Techart/Synovate Comcon



The Dog population



15 mil dogs

Source: Euromonitor

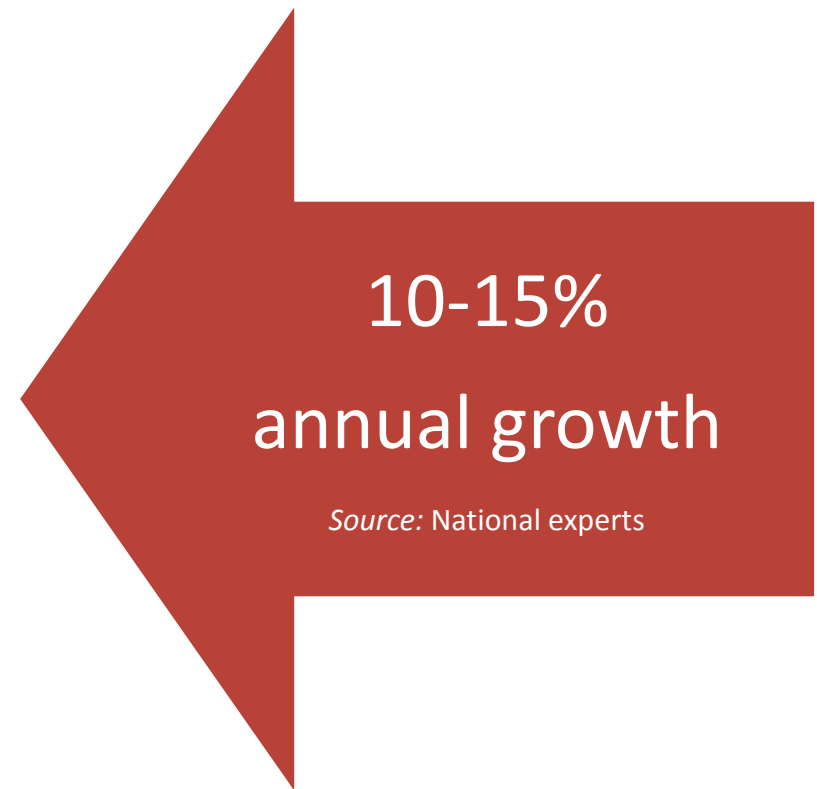
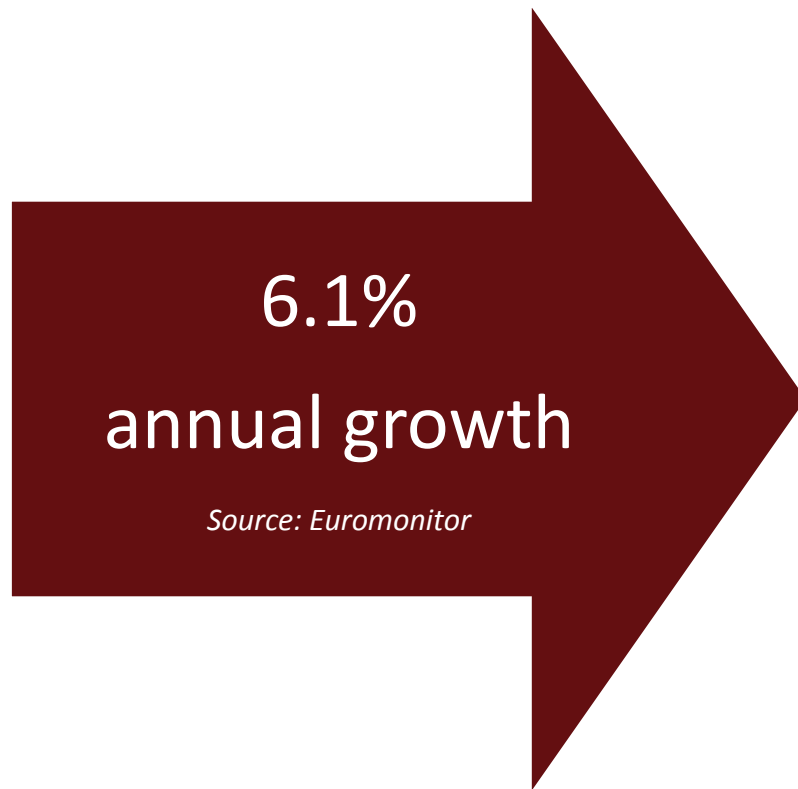


20 mil dogs

Source: Techart/Synovate Comcon

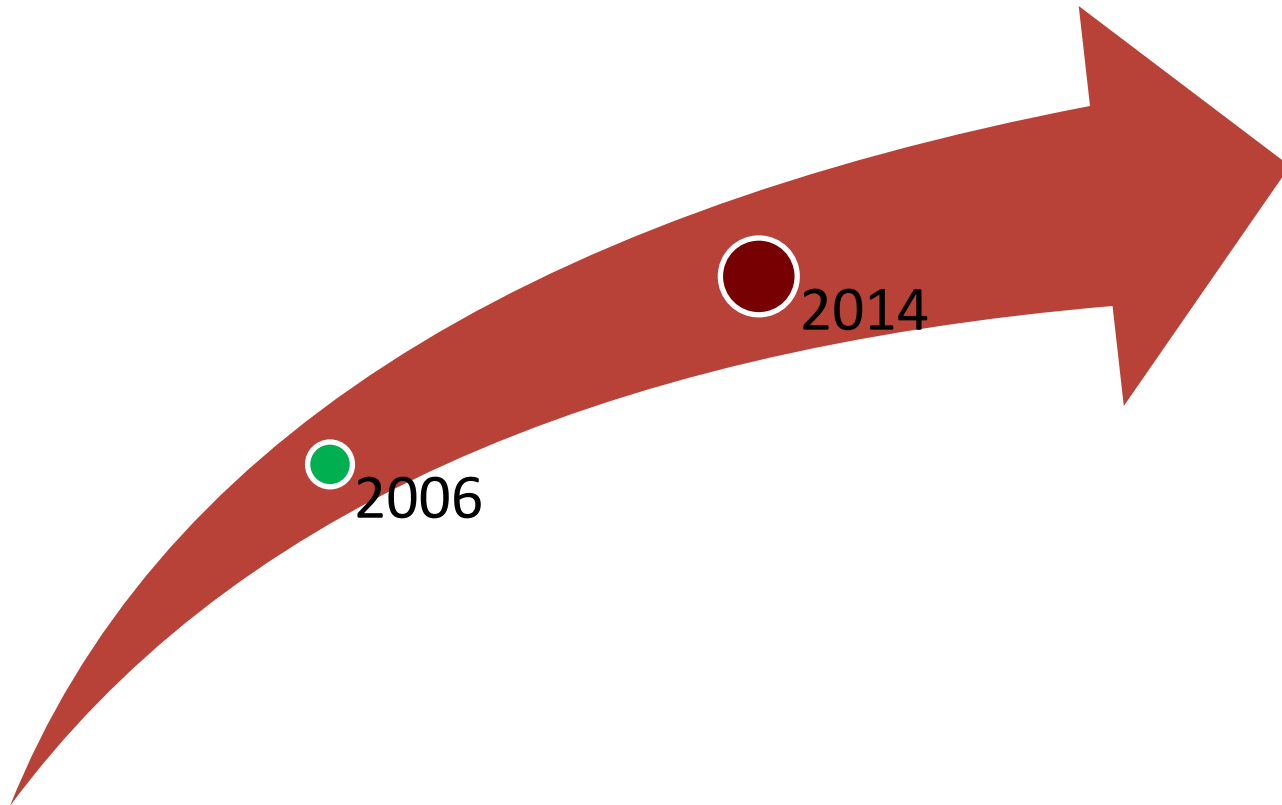


Petfood growth rate





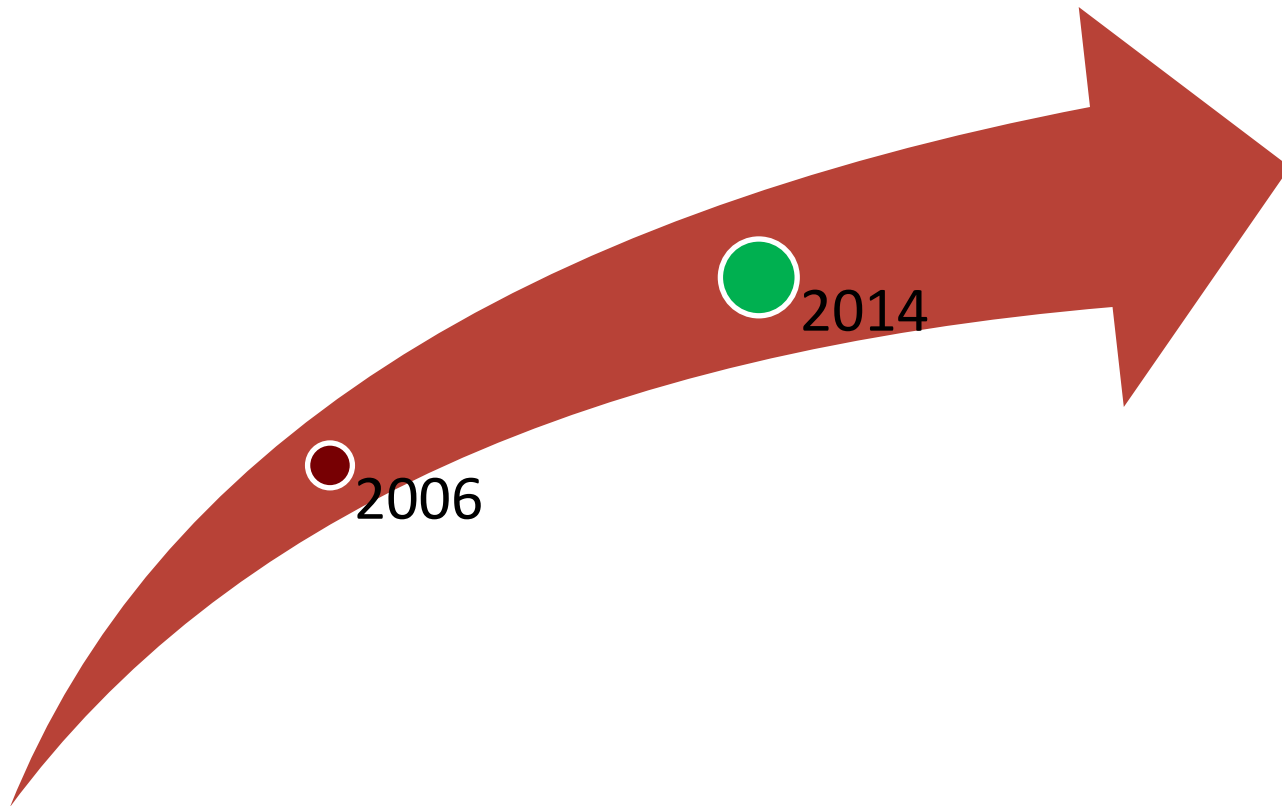
The value chain development



The value chain anno 2006



The value chain development



The value chain of the “new” grocery petfood market



The value chain of the new specialist trade petfood market



The value chain of the future?

The contract flow



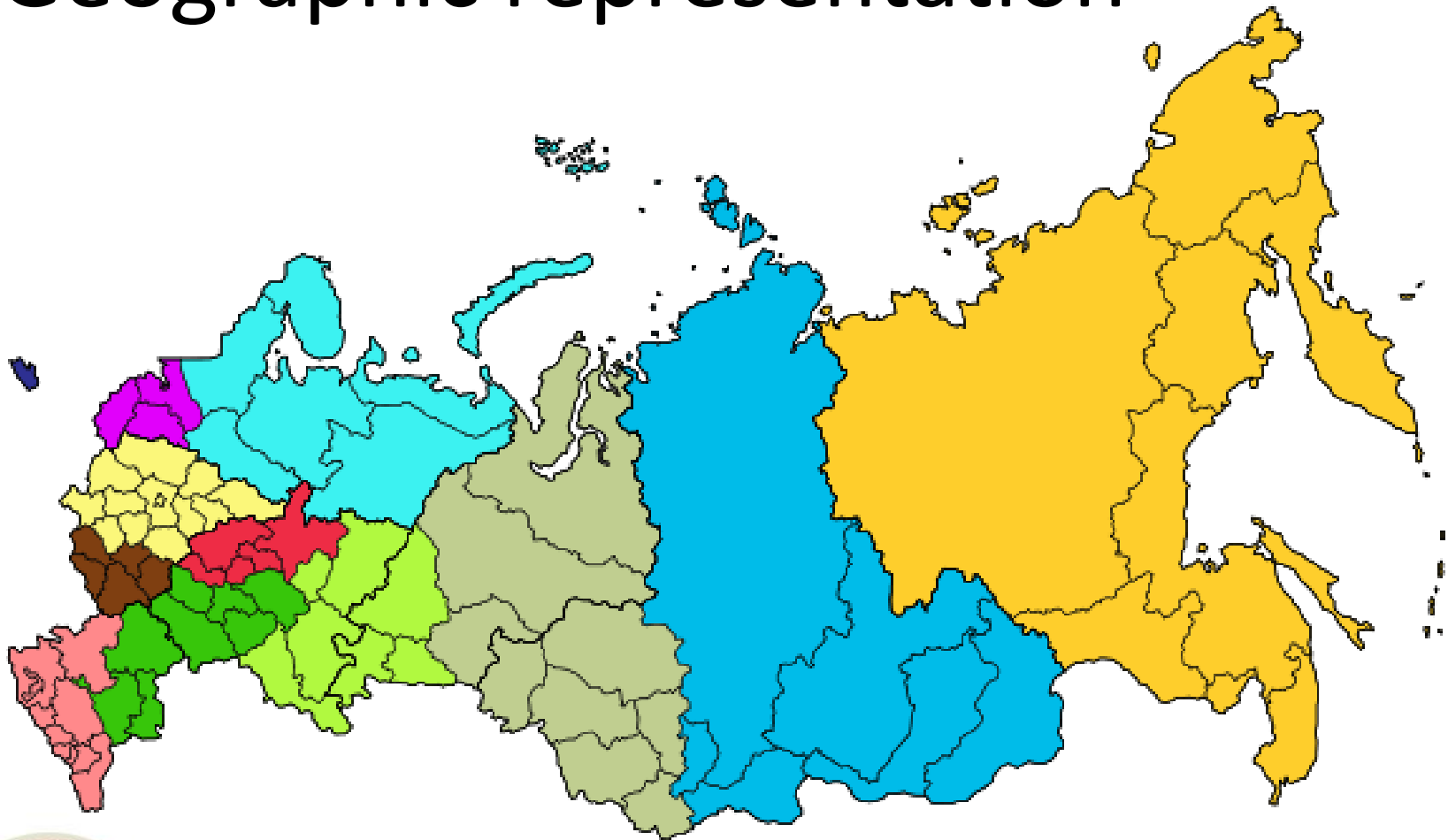
The product flow

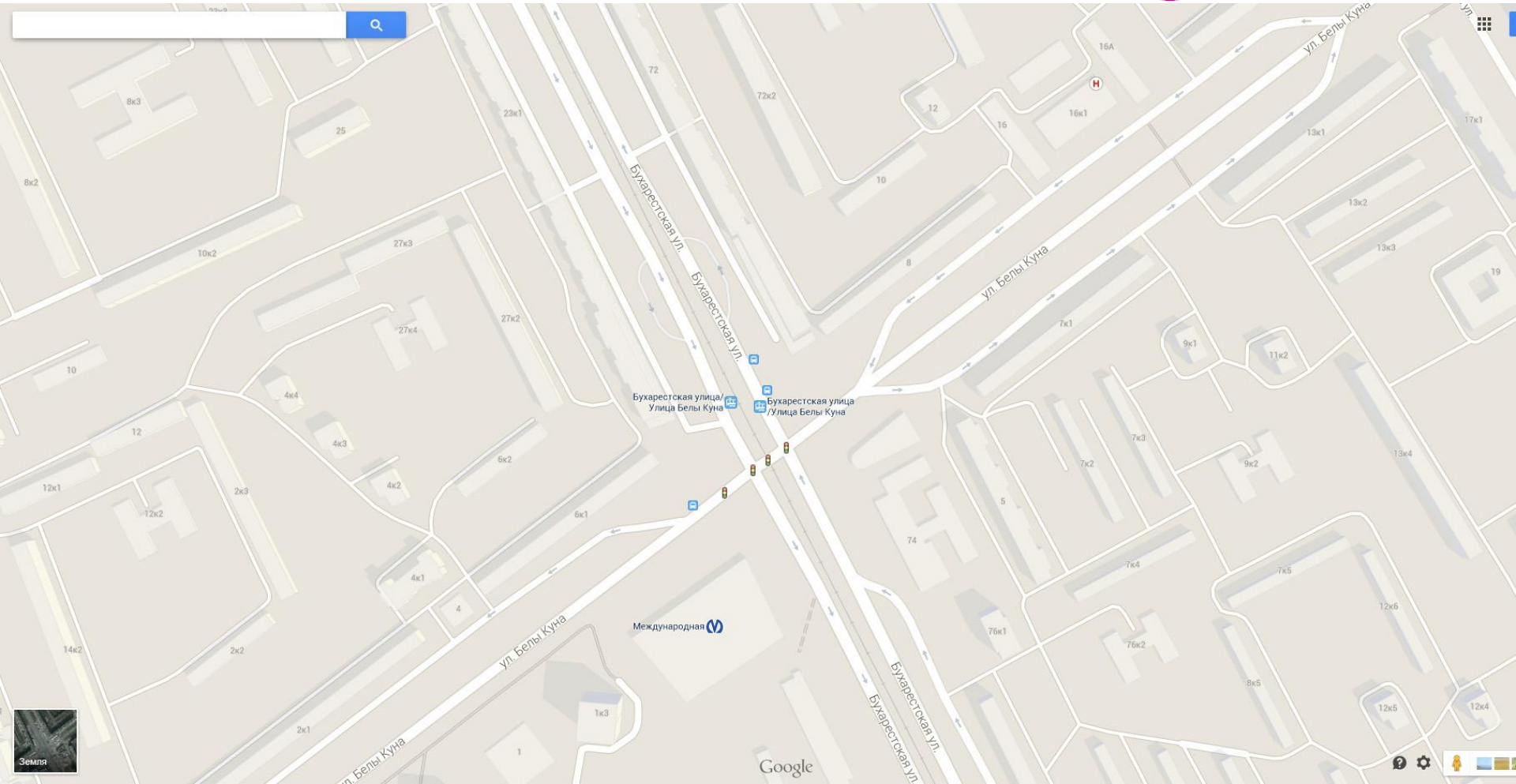


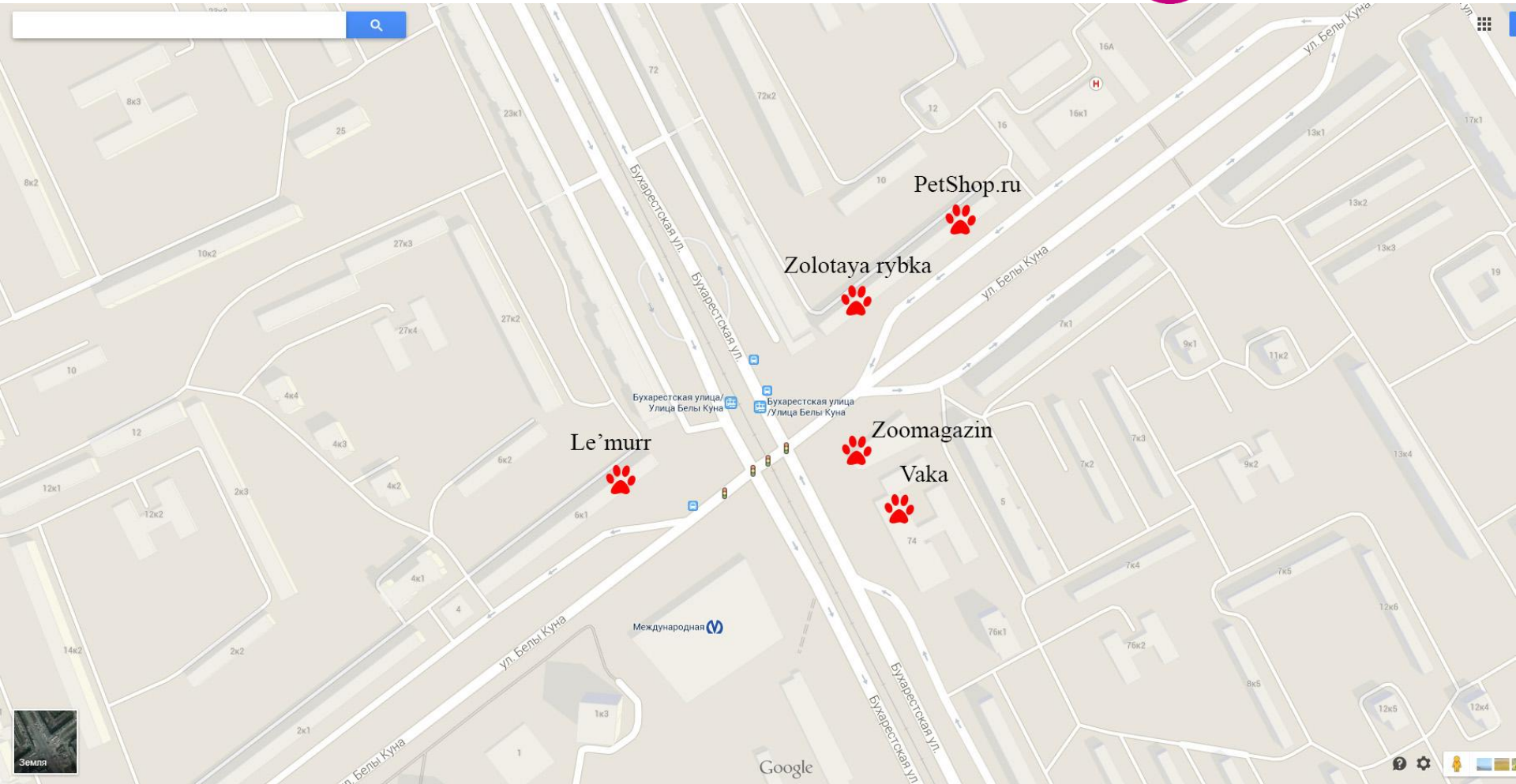
Presentation flow



Geographic representation







Exclusive brands







Shop made SKU's



The challenge of POP





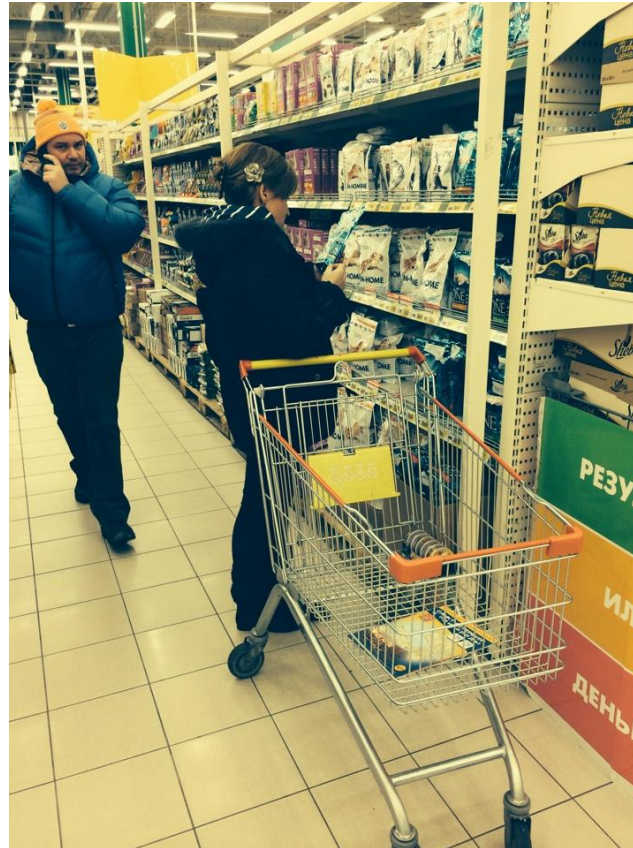
Pet food vs. table scraps



The decision making process



The decision making process



Purchasing pattern



Questions?

