The Russian pet food market behind the statistics

By CEO & Owner Henriette Bylling

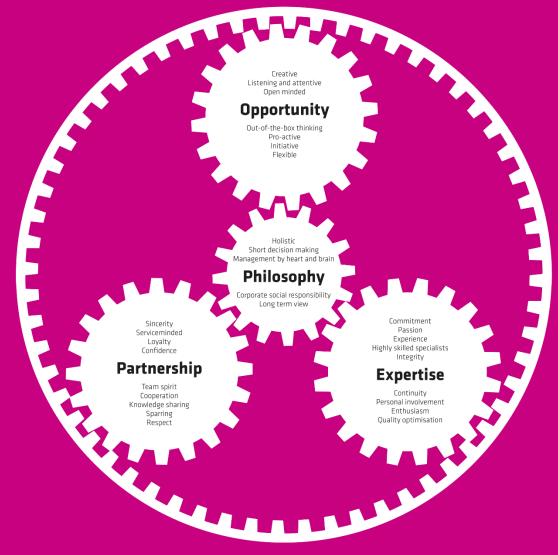


PetfoodIndustry





The Aller Petfood Drive





Presentation flow













The Cat population

20 mil cats

Source: Euromonitor

30 mil cats

Source: Techart/Synovate Comcon



The Petfood The value Distribution Retail Pet owner







The Dog population

15 mil dogs

Source: Euromonitor

20 mil dogs

Source: Techart/Synovate Comcon



The Petfood The value Distribution Retail Pet owner





Petfood growth rate

6.1% annual growth

Source: Euromonitor

10-15% annual growth

Source: National experts



The Petfood Chain Distribution Retail Pet owner













The value chain development

2006

10

Petfood Forum 2014

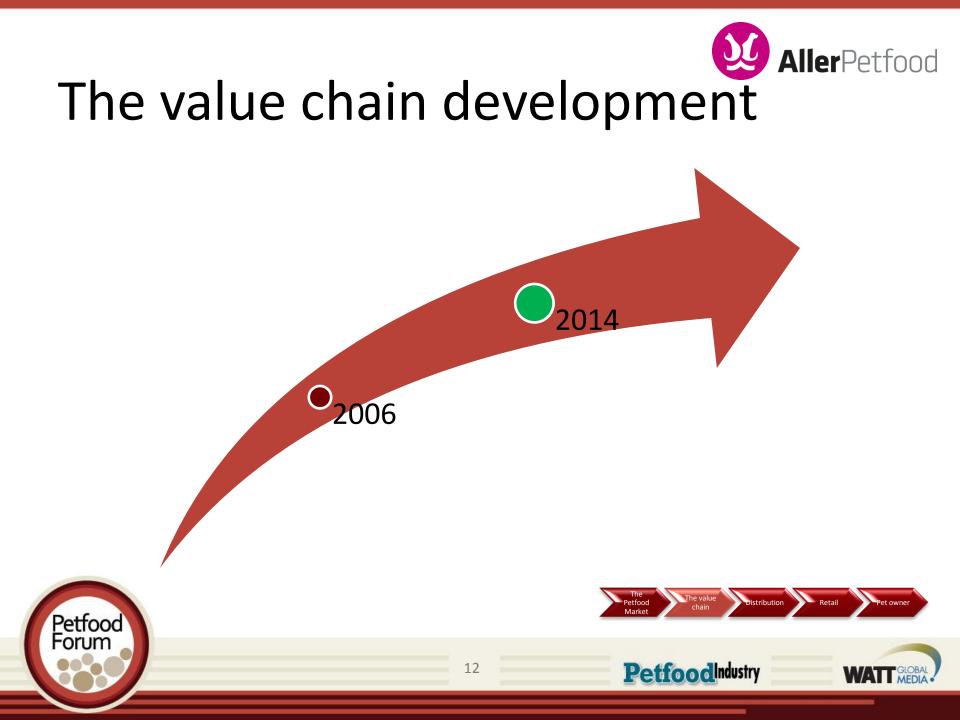














The value chain of the "new" **W** Aller Petfood grocery petfood market





The value chain of the new Aller Petfood specialist trade petfood market

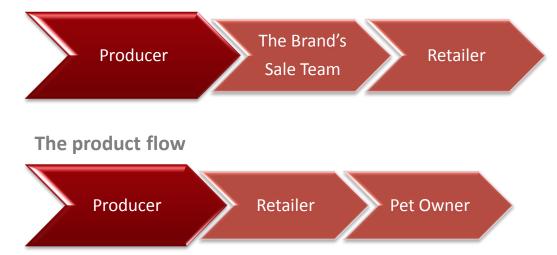


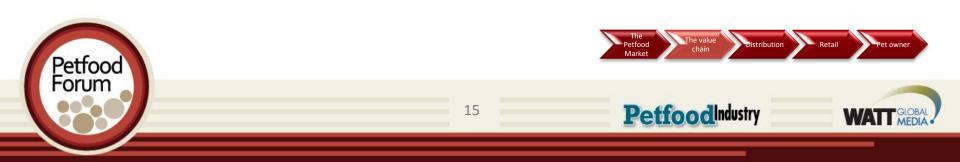




The value chain of the future?

The contract flow







Presentation flow



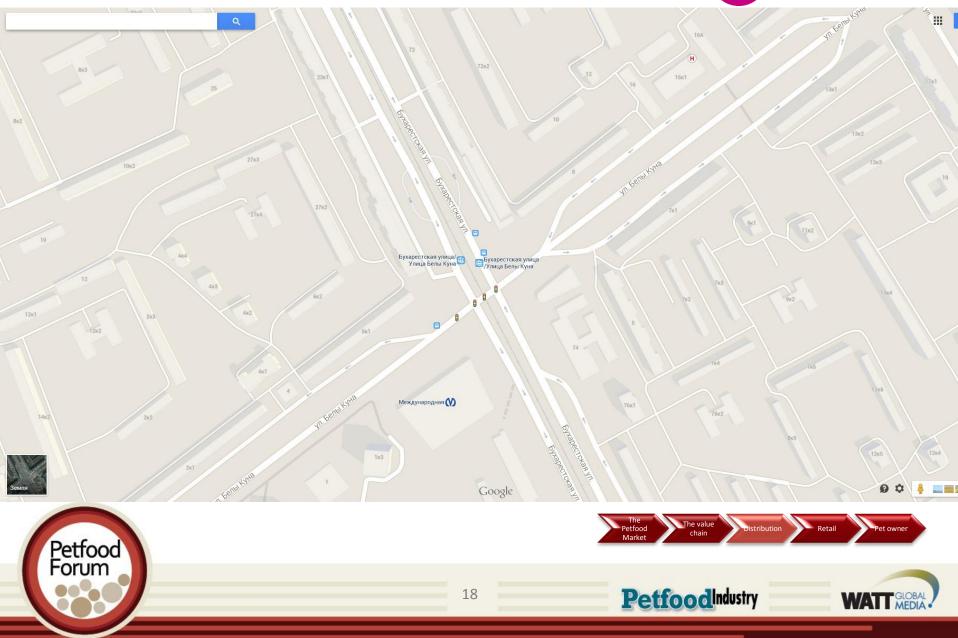


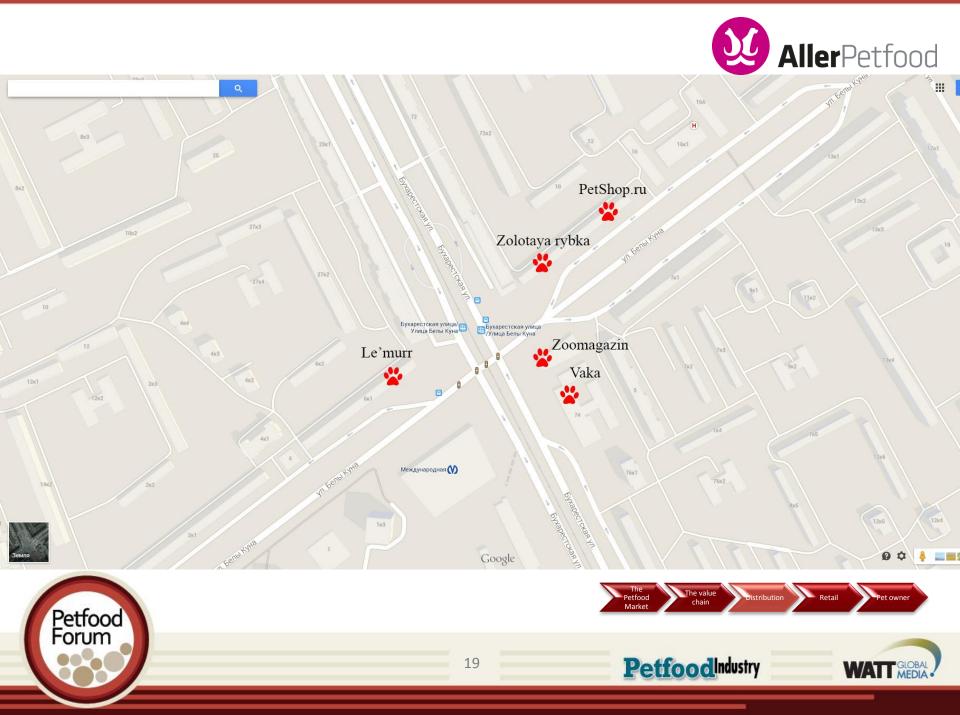


Geographic representation



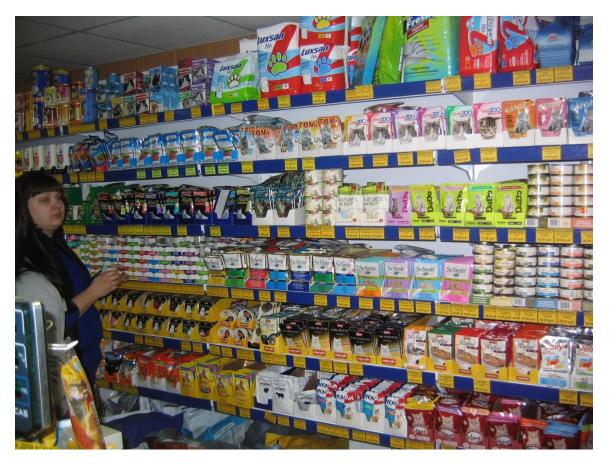








Exclusive brands

























Shop made SKU's











The challenge of POP

















Pet food vs. table scraps







The decision making process











The decision making process











Purchasing pattern











Questions?





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