

FRONT OF  
THE PACK

# Vision & Strategy

Q1 2020



**Ask any pet parent, and they'll tell you  
the love they share with their dog is  
*one of the most positive forces on the planet.***

“

**He is my life.  
I love him like he  
were my baby.**

- Sarah x Bella

**She is my reason for  
moving forward when  
I am about to give up.  
She is my heart.**

- Joe x Alfie

**I thought I was  
rescuing him, but he  
truly rescued me.**

- Maria x Billie

”

As told to FOTP by US pet parents



# The emotional stakes have never been higher.

*But there's a problem. And it's getting bigger.*

Obesity

Arthritis

Skin issues

Dental health

Stress

Digestion

1 in 3

**dogs is now clinically obese<sup>1</sup>**

66% rise

**over past 10 years<sup>2</sup>**

1 in 4

**vet visits is for a skin complaint<sup>3</sup>**

80%

**of dogs have dental disease by age 3<sup>4</sup>**

over 1/3

**dogs are estimated to suffer from canine anxiety<sup>5</sup>**

50%

**rise in gastrointestinal problems over past 5 years<sup>6</sup>**

**What hurts most? The most common diagnoses made by US veterinarians are preventable - with the right support.<sup>1</sup>**

*But the odds are stacked against pet parents.*

- Traditional pet care is reactive, not proactive, with billions spent addressing issues too late
- Complementary health for pets is an under-served category with shaky standards
- Misinformation rules, from bad 'wellness' advice to misleading product label claims

**We think so.**

*Introducing Front Of The Pack, on a mission to:*

**Lead the revolution  
on pet health**



We're starting by setting a new standard in *dog supplements*





*Leading with story-telling and science...*

***Your unconditional love.***  
***Our uncompromising science.***

# Co-founders with proven track records, ambition and passion for pets



**Neil Hutchinson**  
*CEO*

Neil is a serial entrepreneur.

He founded Forward3D and led it to a \$65m exit. It's now one of the world's largest independent digital agencies.

He re-invested Forward3D's profits to acquire uSwitch and led it to a \$120m exit. It was later part of the \$3bn Zoopla Group sale to Silver Lake.

Neil was the majority shareholder at exit and didn't raise venture capital for either business.

He also co-founded the venture fund Forward Partners and charity Kindness.org, sits on the board of Founders Pledge and built a hotel in Marrakech from scratch.



**Chris Wilkinson**  
*VP People & Ops*

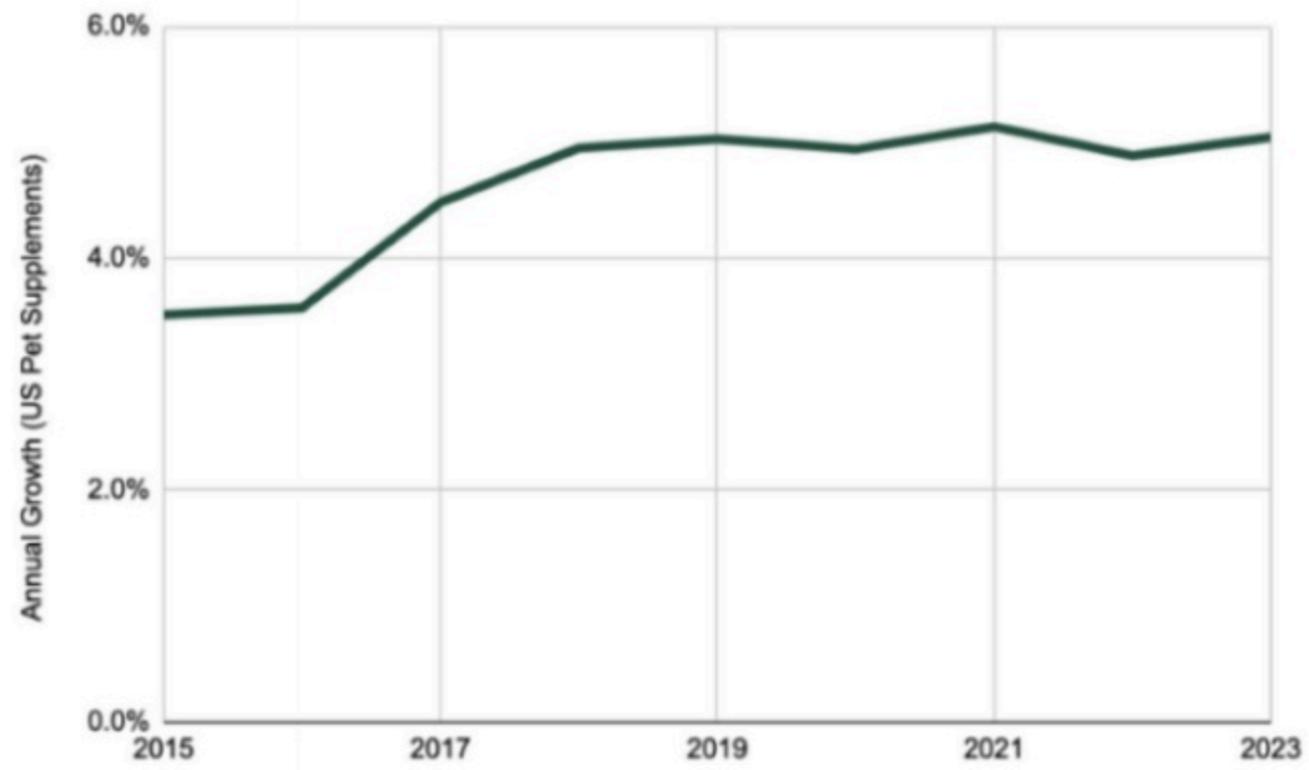
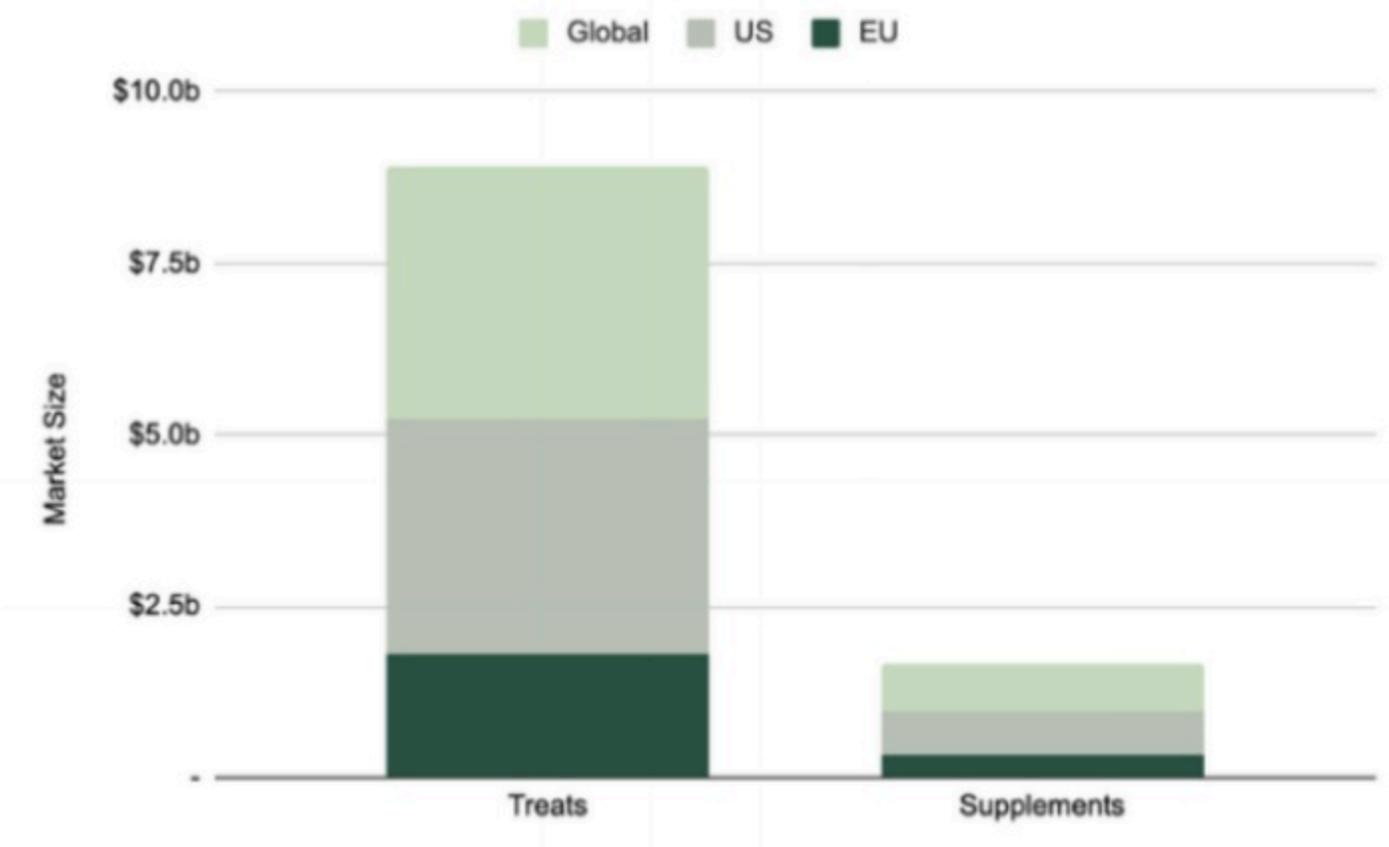
Chris has helped build and align leadership teams for some of the world's most exciting startups.

Many of his previous clients have gone on to either list on the NASDAQ/FTSE or attain unicorn status.

He built the team for VC firm, Forward Partners and helped them raise their second fund from BlackRock in 2017.

His work in People & HR has been featured in The Times, and his playbook is used by 40+ companies.

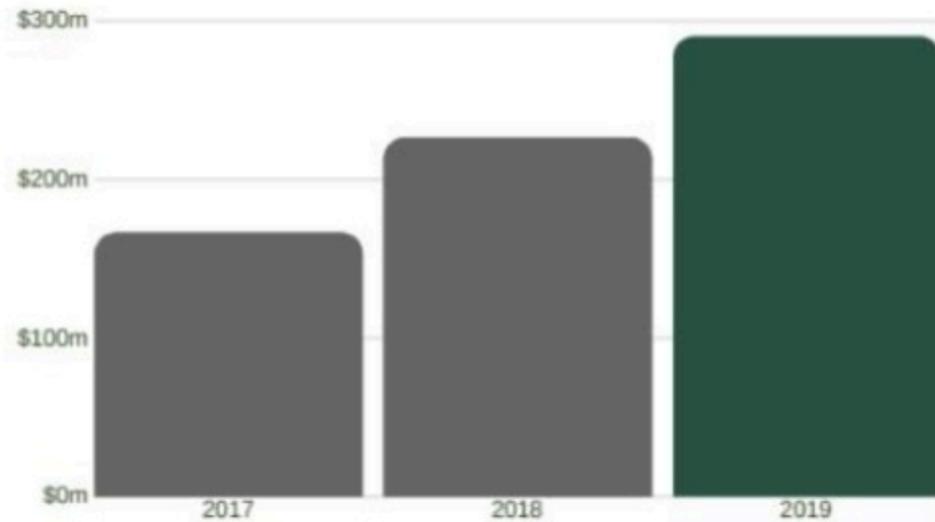
# The market opportunity is big - and getting bigger



Sources (US data): Packaged Facts - Pet Supplements in the U.S. 7th Edition and Statista

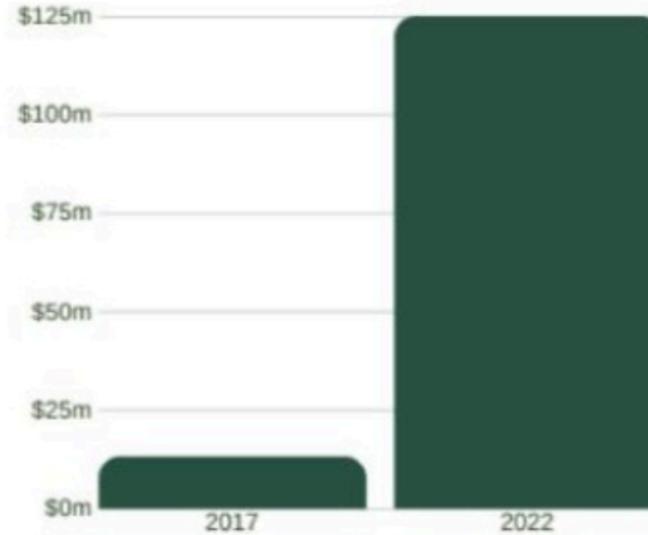
# We're jumping on fast-growing trends

**US Online Pet Supplement Sales, 2017 - 2019**  
Annual Growth: 32.2%



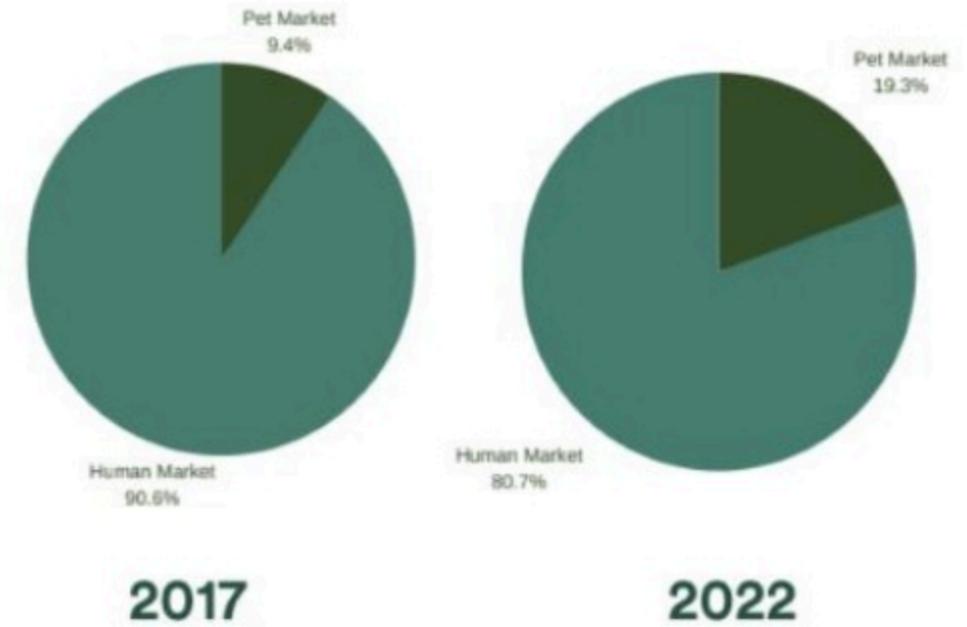
Source: Packaged Facts - Pet Supplements in the U.S. 7th Edition

**Hemp-derived Pet Supplies, 2017 - 2022**  
Annual Growth: 57%



Sources: Hemp Business Journal; New Frontier Data

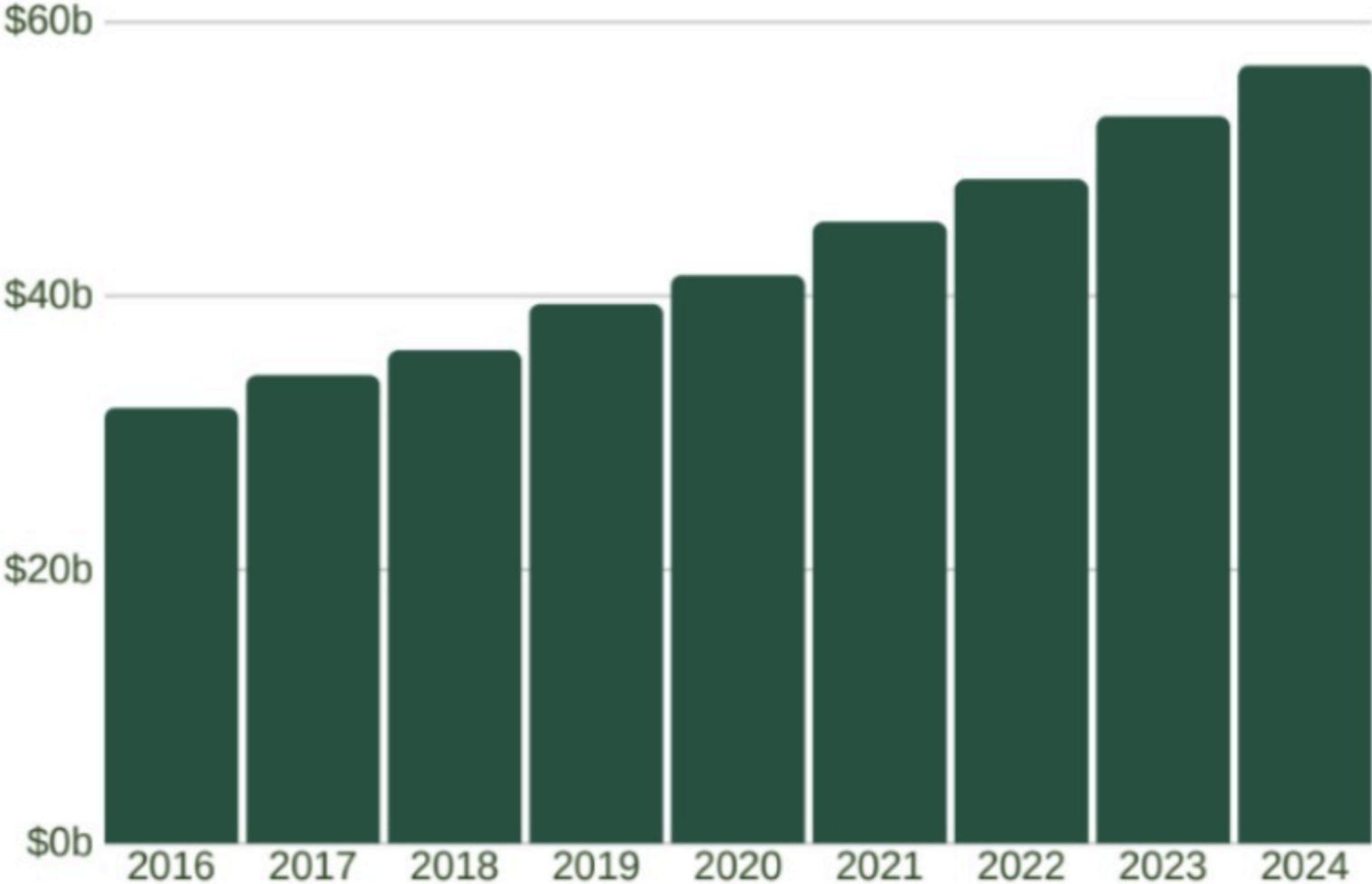
**\$sales of hemp-based cannabidiol products in the US (2017 and 2022)**



Source: New Frontier Data:

# Pet trends follow human ones - and the market leader spot is open

**US Human Supplement Sales, 2016 - 2024**  
Annual Growth: 7.5%



Sources: Statista; Grand View Research: <http://bit.ly/2OoFkCh>  
An additional report by Grand View Research predicts the global market for dietary supplements to reach \$278b by 2024

**Thank you.**

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Unconditional love, Uncompromising science.



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