

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 ¹	66% rise over past 10 years ²	1 in 4 vet visits is for a skin complaint ³	80% of dogs have dental disease by age 3 ⁴	over 1/3 dogs are estimated to suffer from canine anxiety ⁵	50% rise in gastrointestinal problems over past 5 years ⁶

1 Banfield | 2 Banfield | 3 VCA Hospitals | 4 VCA Hospitals | 5 Dogtime | 6 Banfield

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

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

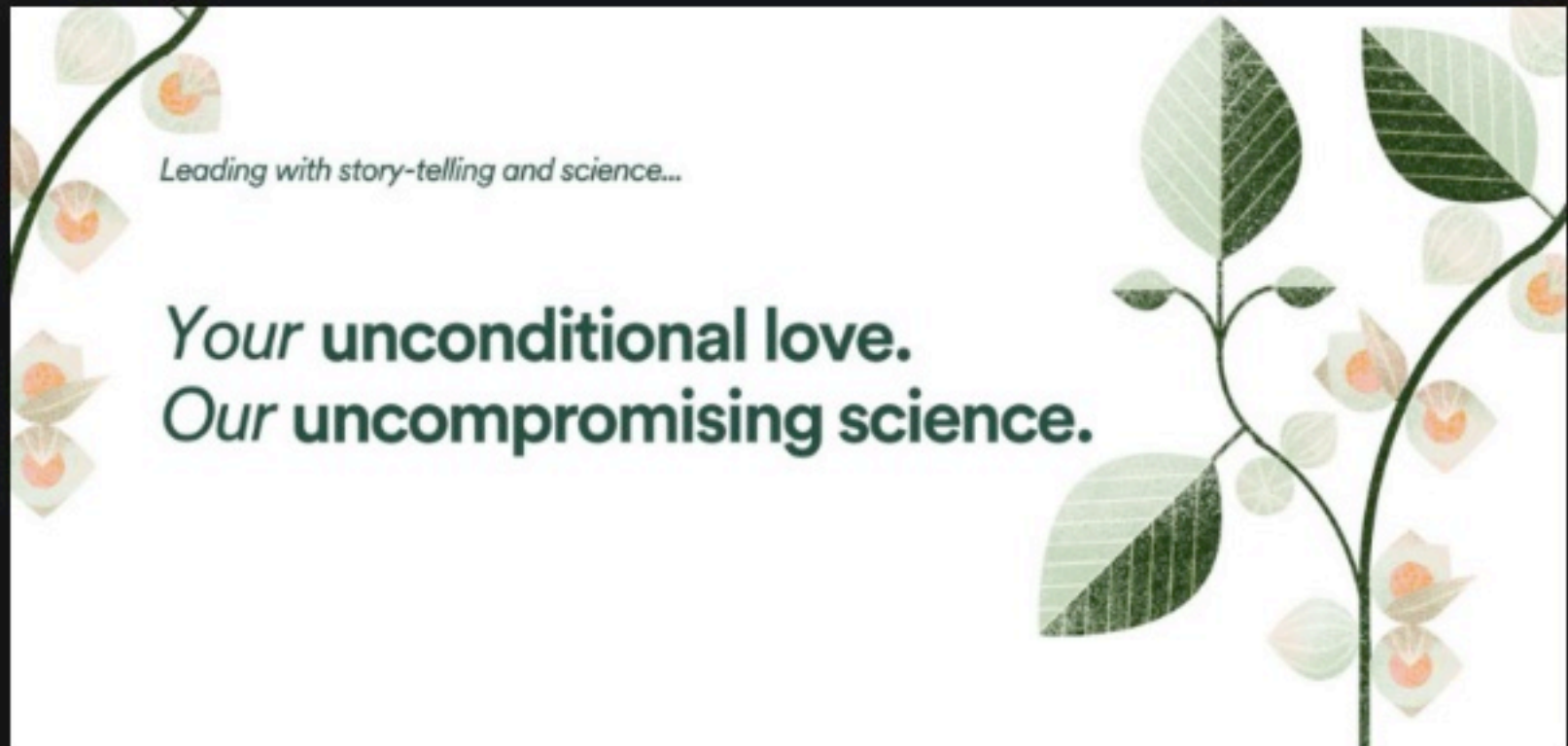


We're starting by setting a new standard in *dog supplements*



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

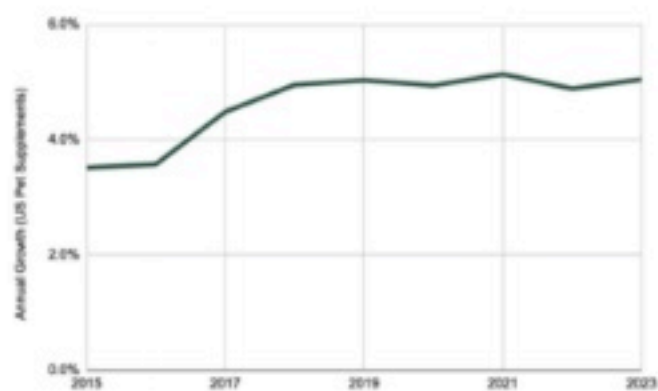
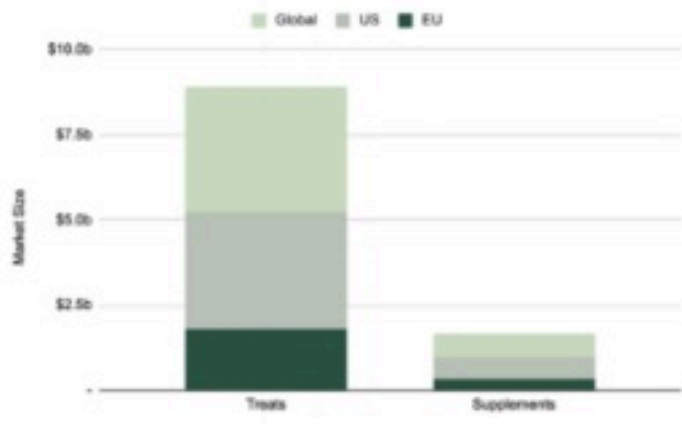
Chris has helped build and align leadership teams for some of the world's most exciting startups.

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.

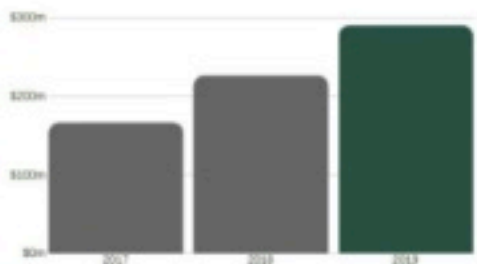
The market opportunity is big - and getting bigger



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

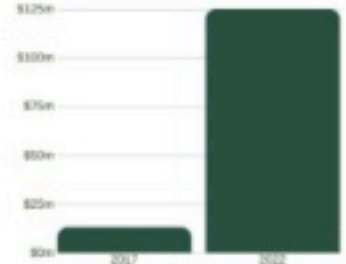
We're jumping on fast-growing trends

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



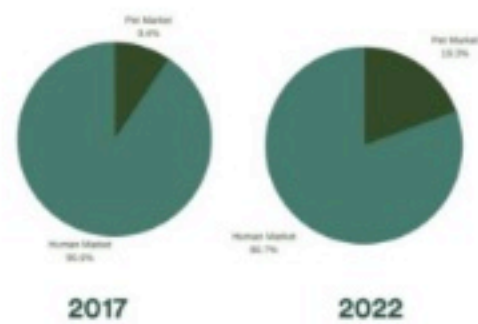
Source: Packaged Facts - Pet Supplements in the U.S. 7th Edition

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



Sources: Hemp Business Journal; New Frontier Data

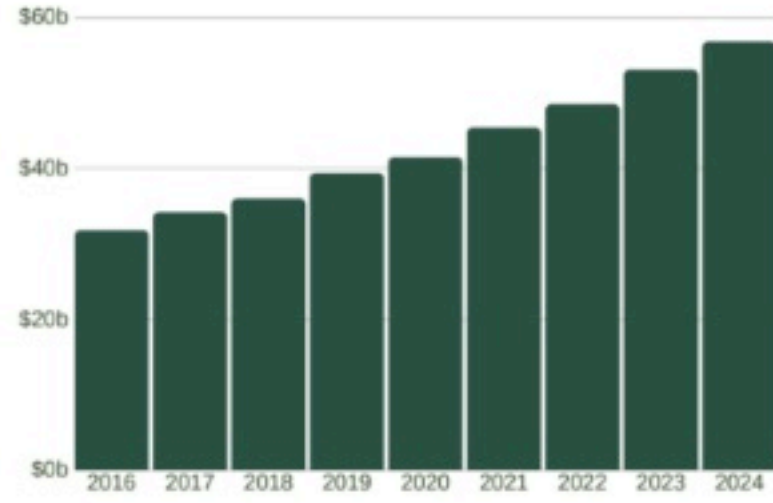
\$sales of hemp-based cannabidiol products in the US (2017 and 2022)



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/2DoFkCh>
An additional report by Grand View Research predicts the global market for dietary supplements to reach \$278b by 2024