

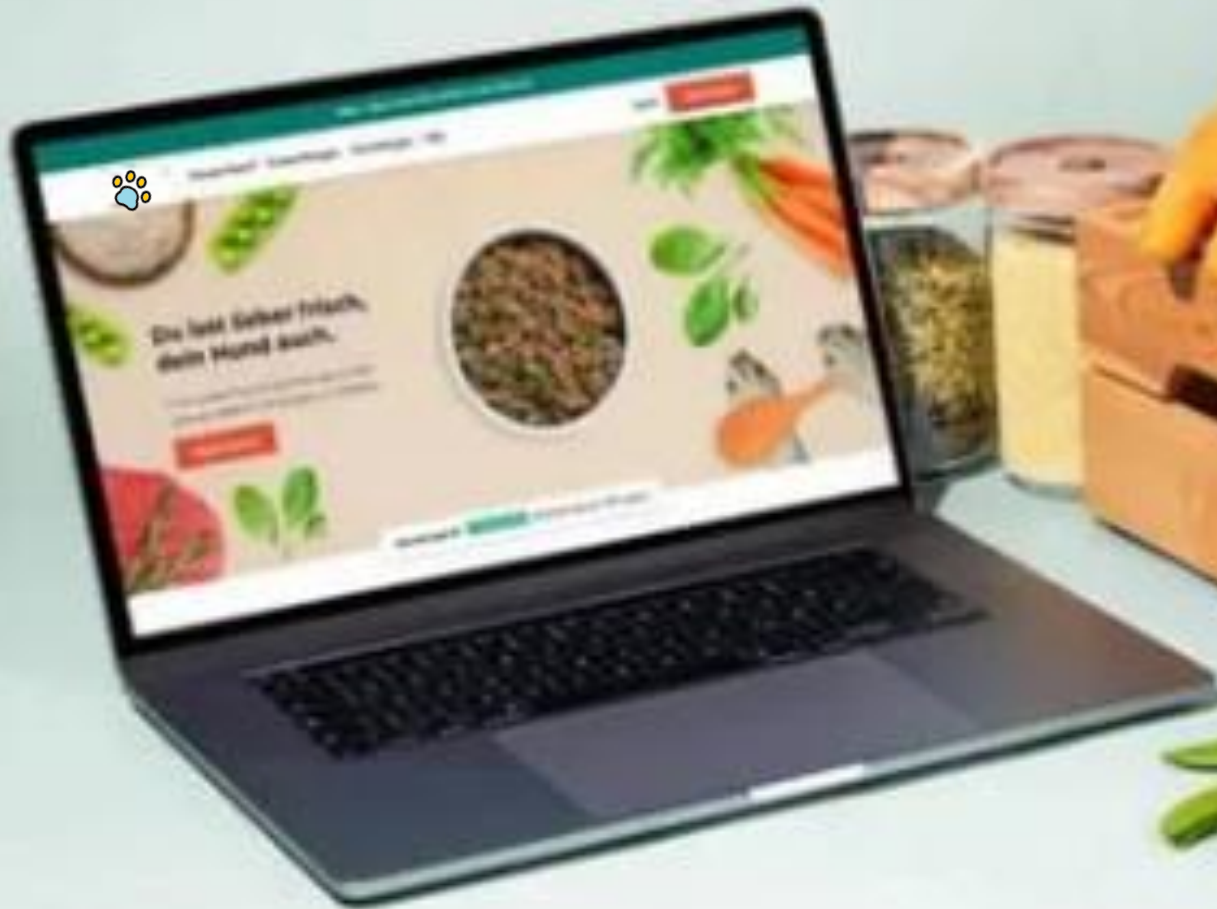


Business Plan for Online Healthy Pet Food



paw-wow

Only if pets could cook



AT A GLANCE



paw-wow.com is a D2C subscription based company that makes it easy for pet owners to provide **hassle free fresh, healthy and individualized/personalized** nutrition for their beloved pets

vision

“We will be the leader in the D2C Fresh Pet Food Market in the country”



MARKET OPPORTUNITY

Disrupting the India Pet Food Market

Pet care Market is
74,000 crores

PRODUCT

Fresh Cooked and Personalized/Customized dog food offering via D2C subscription

OUR DNA

PetTech Company with a **strong focus on data, automation, personalized food and customized communications**

10k subscribers in
first 6 months of
launch

TECH ENABLED, DATA DRIVEN & HIGH QUALITY SUPPLY

Excellent tech stack and exclusive supplier ensure **rapid scaling potential without supply limitations**

TEAM

We all aim to grow the company to the **leading fresh pet food player**

70 years of
combined experience

INVESTMENT OPPORTUNITY

We look for **strong partners** with a footprint in **D2C** and/or **PetTech**

VISION

We want pets to live longer, healthier
and a happier life



by providing the healthiest food tailored
to their needs



With maximum convenience and joy
for their owners



With best technology, pricing, hassle
free for our customers



SEED FUNDING



Target to raise **INR 15 crores** in a seed fund round 1 - raise by May 2023

Why now?

- The Indian pet care market is projected to register a CAGR of **19.2%** during the next **10 years**
- major factors driving the demand for pet food in India include **increasing pet ownership, rising per capita disposable income, and increasing nuclear families**, particularly in urban areas.
- The initial impasse of the Indian consumers' overspending on pets is slowly giving way to trends such as **pet humanization and sensitization**, which are well demonstrated by the rapid rise in adoption rates.
- In India, pet food predominantly **includes packaged, ready-to-eat food products** manufactured to provide complete nutrition to pets.
- In India, pet ownership is on the rise. According to industry estimates, there are **over 31 million** pets in the country now, with a growth rate of approximately **11%**, implying an addition of almost **3 million pets per year**.
- more than **80%** of families serve home-cooked meals to their pets, this trend is changing as owners become more aware of and seek out better pet care products and food.
- While dogs continue to be the most popular pets, shoppers are now choosing cats.
- Dog food accounts for the majority of the pet food industry. Pet ownership has increased in smaller cities and villages as well.
- Pet ownership is spreading across all socioeconomic strata in town.
- Owning pets is no longer just a metropolitan phenomenon but a phenomenon across the country.
- Ease of access due **to online shopping** is helping pet food companies extend their reach to smaller towns and expand the market.

SEED FUNDING

Target to raise INR 15 crores in a seed fund round 1 - raise by May 2023



Why now?

Indian pet care market projected to register a CAGR of **19.2%** in the next **10 years**

Dog food accounts for the majority of the pet food industry. Pet ownership has increased in smaller cities and villages as well

80% of families serve home-cooked meals to their pets, this trend is changing as owners become more aware and seek out better pet care products and food

major factors driving demand for pet food include **increasing pet ownership, rising per capita disposable income, and increasing nuclear families**, particularly in urban areas.

Owning pets is no longer just a metropolitan phenomenon but a phenomenon across the country

pet food predominantly **includes packaged, ready-to-eat food products** manufactured to provide complete nutrition to pets

trends such as **pet humanization and sensitization**, which are well demonstrated by the rapid rise in adoption rates.

Ease of access due to **online shopping** is helping pet food companies extend their reach to smaller towns and expand the market

over 31 million pets in the country now, with a growth rate of approximately **11%**, implying an addition of almost **3 million pets per year**

PROBLEM

Today it is **almost impossible** for the average pet owner to buy **healthy** and **customized** pet food leading to **obesity', cancer** and **premature death**.

Even pet enthusiasts need to **spend hours of research** mostly in trial and error method to compile adequate pet meals



SOLUTION



We solve that problem by shipping personalized, premium pet meals with a click of a button right to your door - all supported by our strong data approach

We want pets to live a longer, healthier and happier life



by providing the healthiest food tailored to their needs

BEST FOOD



With maximum convenience and joy for their owners

EASY BUY

FRESH

paw-wow only sells fresh pet food

BEST INGREDIENTS

paw-wow uses human food grade ingredients as a natural source of vitamins and minerals

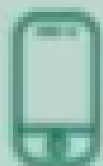


REGIONAL

paw-wow only works with Regional Contractors

INDIVIDUAL

paw-wow provides tailor made pet meals which is healthier and tastier



Your individual pet meal prepared in **less than 30 minutes**



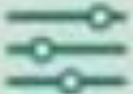
We ship your order out of our industrial pet meal kitchen



Your pet will taste and **you see the difference**


FRESH FOOD - PRODUCT JOURNEY



1 
food configurator



2 
delivered within 24-48h*

3 
pre-portioned
& with your name



MARKET & TRENDS



- over 31 million pets in the country now, with a growth rate of 11%, implying an addition of almost 3 million pets per year. **paw-wow** targets the premium customers who have a higher willingness to pay

TAM
49,000 crores or INR 490 billion

SAM
9,800 crores

SOM
980 crores

Market for pet food

- 49,000 crores pet food industry in India growing at CAGR @ 4.7%
- 10% Online Pet Food Sales. Slated to grow to 36% by 2028
- Average Rs 100 spent on pet food per day in India

Market for premium pet food

- 14% is premium portion of pet food market
- 4.34 million pets getting fed premium pet food
- Rs 300 expenses for pet food per day in India (premium factor 3x)

Paw-wow market for premium pet meal subscriptions

- 15% share of online sales of Indian pet food market (735 cr)
- 30% assumption for share of people willing to get convenience of subscription
- 3% target market (9 lac) pets share the next 4 years in this blue ocean market

MARKET & TRENDS



- **paw-wow** addresses key consumer trends which have emerged over the last few years as customer demands a more personalized and premium offering due to pets sensitivity and emotion bonding.

18.89%

Annual growth of Indian Pet Food Industry 2023-2027

23%

Growth of sales of frozen and refrigerated pet food in India in 2022



PREMIUMISATION

The willingness of consumers to spend more on premium pet food is increasing as more than half of all the pet owners intensively engage in research about healthy pet food



HUMANISATION

Pets are seen as important family members and the preference of the owners are often mirrored to their pets. Around 70% of pet owners have put their pets on a special diet



CRY FOR TRANSPARENCY AND FOCUS ON INGREDIENTS

Pet Owners are looking for transparency & clear labelling of pet food. They are increasingly frustrated as around 50% of pet owners say finding healthy products is confusing or difficult



ONLINE & PERSONALIZED

Pet owners interest in online offerings is building up as COVID-19 pandemic has boosted online shopping behavior. In India because of the lockdown effect, Consumers have now gone in the habit of online purchase.

FRESH FOOD PEERS

Significant investments seen in the US, UK & FR speaking territories capture the trend of fresh pet food. Sooner or later this will attract Indian Market Potential. **paw-wow** will have the first mover advantage



US fresh dog food trend is 5-7 years old



The Farmer's Dog, USA

Founded : 2014

Funding \$103m/ \$1.4 bn valuation

Last Round Series D (2021)



NomNomNow, USA

Founded : 2015

Funding \$65mn/ \$165m valuation

Last round Series B (2021)



Ollie, USA

Founded : 2015

Funding \$51m/ \$80m valuation

Last round Series A (2020)

Europe is catching on

There is only 1 significant player who for now operates only in the UK)



Butternut Box, UK

Founded : 2016

Funding \$125m/ \$340m valuation

Last round Series D of \$ 40m (July 2021)



DogChef, Belgium

Founded : 2017

Funding \$16m/ \$340m valuation

Last round Series A of €12m (Oct 2021)

INDIAN PET FOOD MARKET TOP PLAYERS



- 1 Mars Inc.
- 2 Nestle SA Purina
- 3 Drools
- 4 Himalaya Wellness
- 5 Glenand

**Major Players sorted in no particular order*

Other Players:
Nutriara Alimentos Ltd
Uni-Charm Corp.
Holistic Select
Eagle Pack
Diamond Natural

Market Concentration



Consolidated - Market dominated by 1-5 major players

← Indian pet food market

Fragmented - highly competitive market without dominant players

**Source: Mordor Intelligence*

INDIAN PET FOOD TYPES



PRODUCT	PET TYPE	DISTRIBUTION CHANNEL	PET CARE PRODUCTS
<ul style="list-style-type: none">Dry Pet FoodWet Pet FoodVeterinary DietTreats/SnacksOther Products	<ul style="list-style-type: none">DogCatBirdFishTortoiseOthers	<ul style="list-style-type: none">Specialized Pet ShopsOnline Retail ChannelHypermarkets/SupermarketsOther Distribution Channels	<ul style="list-style-type: none">Dry Pet FoodWet & Canned Pet FoodSnacks and TreatVeterinary DietMass ProductsPremium ProductsPlant-Based ProductsAnimal Based ProductsPet BoardingPet TrainingPet GroomingPet TransportationPet WalkingShampoosGrooming WipesBath & ShowerBrushesToothpasteTick Repellant

OUR PRODUCT TODAY

We deliver **personalized, high quality pet food at scale** with a tech-first approach

PRODUCT VISION

One-Stop Shop for pet well being with a wide range of touch points....transitioning from pet food to **pet care products**



Individual high quality pet food

Individual, highest quality pet meals with Nutri-Mix

Leading Pet food supplier pan India
Healthy and tasty food for pets

OUR TEAM



Subodh Naudiyal

IT, Sales & Marketing



Suresh Mohite

Finance & HR



Rahul Khandelwal

Operations



Marketing & Sales 5

Tech 3

Creative & Media 2

Finance & Admin 2

Product & Production 4

Vet 1

Office Dogs  3

SUSTAINABILITY

Goal: CO2 Neutrality by 2026

regionally sourced ingredients, less food waste and return shipping and packaging



PRODUCTION

- Minimal primary energy consumption
 - solar power
- Regional supplies
- Use of agricultural side products
- Cost saving disposal thru use of natural materials

PACKAGING

- Energy efficient straw-based packing system
- Free return shipping and reuse of packing materials



FOOD WASTE

- Shipping of exact amount of food limiting food waste drastically
- ZERO food waste along the distribution chain

DELIVERY

- Exclusive reliance of post next day fresh
- Operating entirely CO2 neutral

50x

Less energy consumed by straw based packing system in comparison to expanded polystyrene



65%

Target of our customers to send back packing material for reuse

CONTACT

Subodh Naudiyal

Founder & CEO

Mobile: +91 932 180 3669

