



HEALTH IS LIFE'S FOUNDATION



Tailored nutritional solutions to support the specific needs of puppies and kittens at each stage of growth

START OF *Life*



ALL PUPPIES AND KITTENS DESERVE THE BEST START OF LIFE IN ALL ASPECTS OF CARE, ADVICE AND NUTRITION.

At Royal Canin, we recognise that only by delivering proper paediatric care and nutrition, we will bring the healthiest foundation for puppies and kittens to develop into the magnificent and healthy animals they have the potential to become.



**In 2022, our
Start of Life range
advanced with
new look packaging,
new product offerings
and new
formulations.**

What's more, is this range is available to provide the best start in life to all puppies and kittens from all purchasing channels, whether that's a veterinary practice or a pet specialty retail store or breeder.



THE TRADITIONAL PETCARE SYSTEM IS ADAPTING TO MEET NEW NEEDS



Pet owners' expectations are evolving



3 out of **4** Pet owners believe their Vet should give them advice in what to feed puppies and kittens

BUT

...But many do their own research as well and **2/3 will Google***

*Source 68% of owners say that they use the internet as one of their main sources of information; RC survey "owners relationship to the Vet: 2018; US,Fr,DE,Br,JP,Ru

COVID crisis means the veterinary profession is evolving

58% of consultations happening over video calls

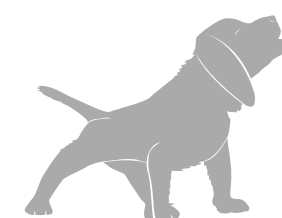


78% sending medications to clients to avoid clinic visits



Source: Kadence Intl: Vet panel Covid-19 study: UK: APRIL 2020

Petcare ecosystem is refocusing – around the customer driving omnichannel approach



This will inevitably impact the relationship they have with vets, **which means getting the relationship right at the start of the pet's life is critical**

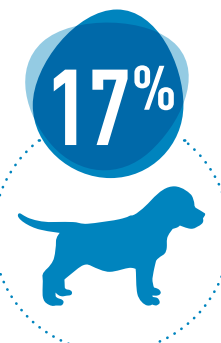


PUTTING THE NEEDS OF CATS AND DOGS FIRST IS IN OUR DNA

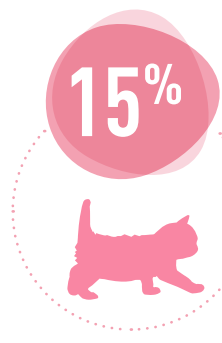
IT'S A NEW OPPORTUNITY EVERY YEAR¹

+170M

new puppies and kittens every year

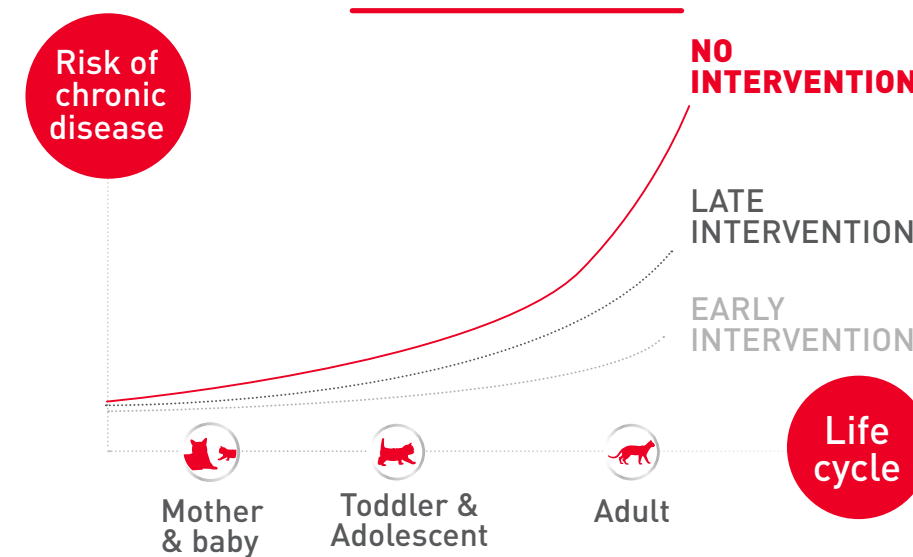


Puppies represent 17% of the dog population



Kittens represent 15% of the cat population.

HOW WE NOURISH AND CARE FOR KITTENS AND PUPPIES WILL IMPACT THEIR HEALTH FOR THE REST OF THEIR LIFE²



Your role is critical to make it happen

BUT NOT ENOUGH PUPPIES AND KITTENS GET THE PERFECT START

LESS THAN 30%

of puppies and kittens are being fed an

APPROPRIATE DIET³



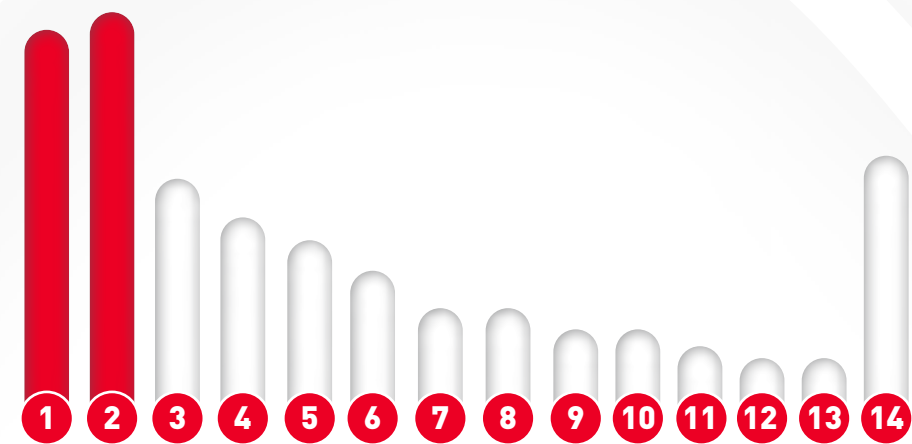
1 - Global figures based on Mars Pet Ownership surveys 2016
 2 - Based on DOHAD concept
 3- Up to 70% of kittens and 50% of puppies are fed with adult food.
 POME study for UK and Germany (Dec 2015 Nielsen homescan data)



GIVING PETS THE BEST FOUNDATION FOR OPTIMAL DEVELOPMENT OUR COMMON MISSION

» puppies and kittens **visit the practice** frequently

puppies and kittens **first consultations** are the most important to ensure a healthy development



Frequency of visits per age

These first visits are crucial⁽³⁾ to ensure a healthy development

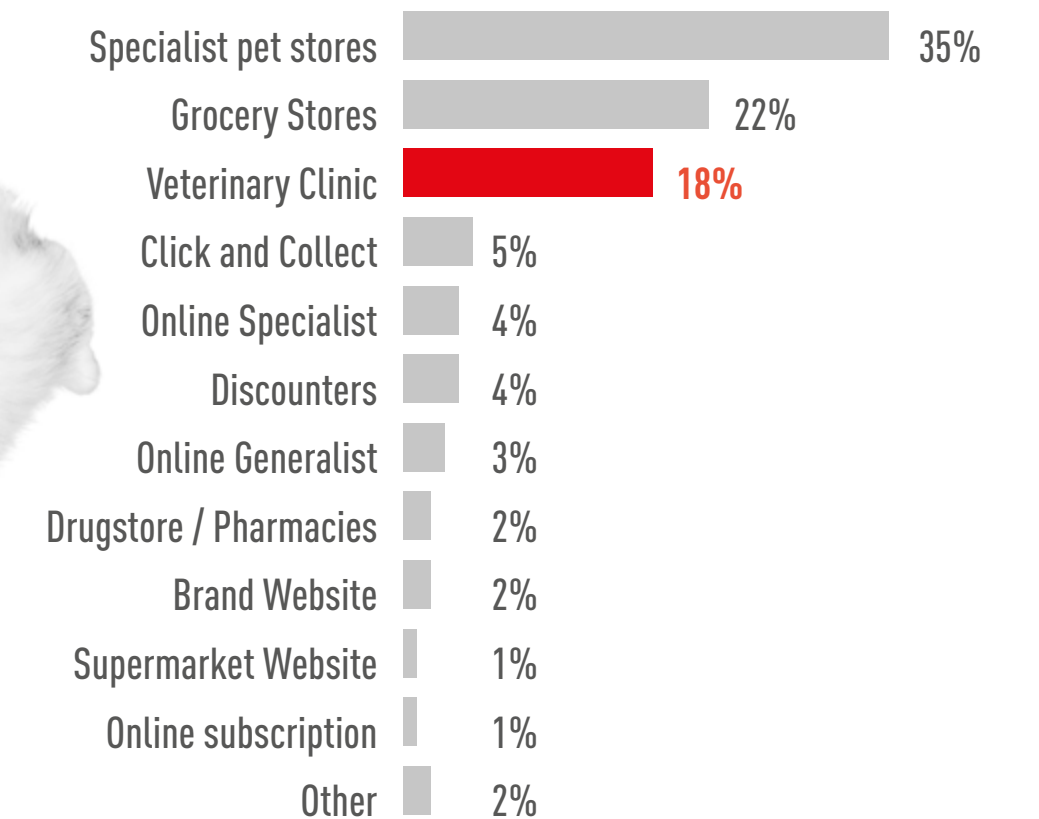
Build a **nutritional** assessment into every visit

75%
OF PET OWNERS believe their vet should give them nutritional advice⁴

Channel first food bought: **Kitten**



Channel first food bought: **Puppy**



A **key destination** for first purchase

Investing time in **nutritional recommendations** for puppies and kittens⁵

3 - Sources: RC Study conducted in Spanish Veterinary hospital based on 326 client visits and 7 vets; RC VAD#9: 'Pediatric Consultations -pain point analysis; CM Research; Qual survey inc 400 online surveys with Pet Owners and Vet staff in US, CA and FR, 2020
 4 - WSAVA Global Veterinary Community 5 vital signs. RC survey "owners relationship to the Vet: 2018; US,Fr,DE,Br,JP, Ru»
 5 - Source: VMS; Spain: Analysis of purchasing behavior of 54,000 puppies and kittens, 2019



TAILORED NUTRITIONAL SOLUTIONS TO SUPPORT THE SPECIFIC NEEDS OF PUPPIES AND KITTENS AT EACH STAGE OF GROWTH



Conception

Birth

Weaning

**Pediatric
visit(s)**

Identified
sensitivities

Physiologic
evolution

Parents >

In utero >

Early growth >

Growth >

Adulthood >



GIVE YOUR KITTEN A HEALTHY START IN LIFE





GIVE YOUR PUPPY A HEALTHY START IN LIFE



STAGE

1

STAGE

2

STAGE

3



BIRTH

1 MONTH OLD
WEANING

2 MONTHS OLD
GROWTH

END OF GROWTH



THE JOURNEY OF A KITTEN OR PUPPY OWNER IN A VETERINARY CLINIC

1 SEARCHING FOR A CLINIC

49.7% of owners* say they look at Internet reviews before choosing a vet.



- Create a **pediatric webpage** on the clinic's website
- Add **publications** on your facebook page

2 MAKING AN APPOINTMENT

The first contact by telephone is the best way to reassure the new owner.



- Utilise the **Top 10 Travel tips** for transporting cats to the clinic
- Provide specific advice on transporting puppies

3 ARRIVAL AT CLINIC

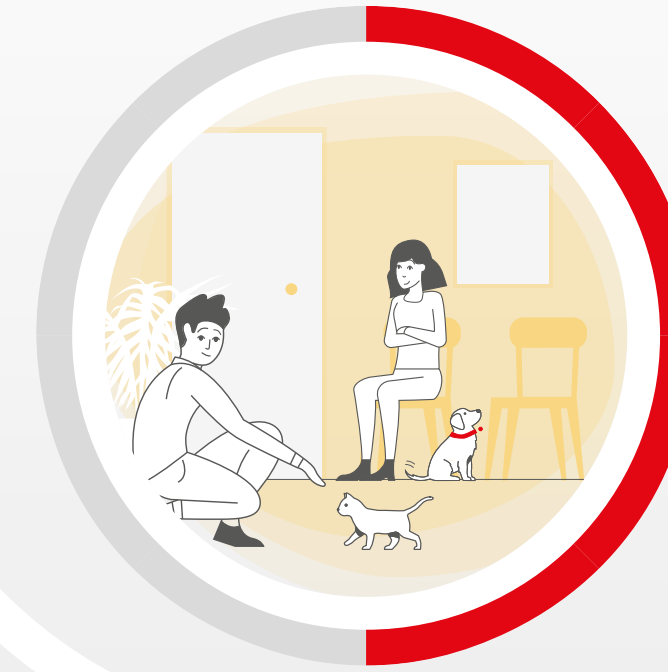
This is the best time to identify the expectations of new owners.



- Provide **pet owner leaflets**

4 IN THE WAITING ROOM

The waiting time, on average 10 minutes, is an ideal time to discover the services of the clinic and to learn a little more about your kitten or puppy.



- Animate screens with **puppies and kittens videos**
- Improve visibility of the **pediatric food** on the shelves
- Utilise the **Cat Friendly Clinic offer**

*Source: VetHelpDirect and OnSwitch in 2015



THE JOURNEY OF A KITTEN OR PUPPY OWNER IN A VETERINARY CLINIC

5 DURING THE PEDIATRIC CONSULTATION

The owner expects this consultation to be rich in information. This is the best time to create a relationship of trust.



- Inspire from our **one voice** to optimise the consultation
- Use the growth tools to illustrate **different stages of growth and specific needs**

6 NURSE SHARING

This is a good time to review **key points** and suggest what is best for the kitten or puppy.



- Use the **Daily Food Calculator on Vet Services** to provide feeding ration guidance

7 CREATE A TRUST RELATIONSHIP

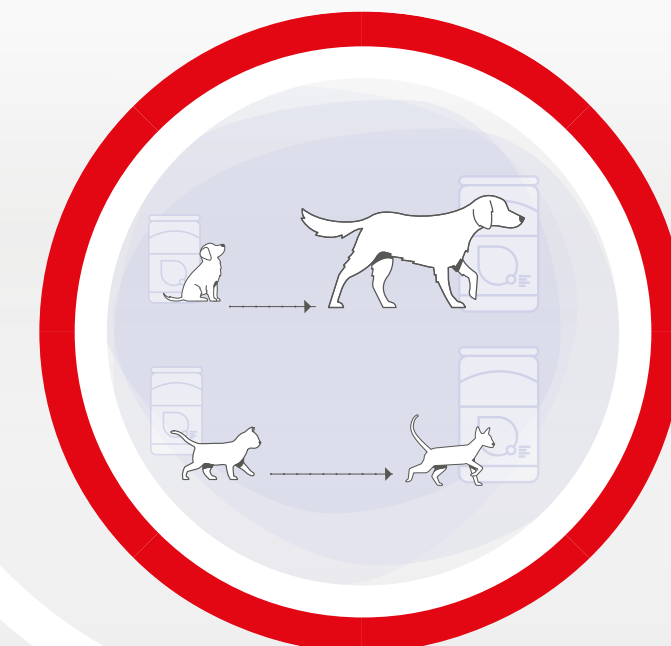
Create a special time to **strengthen the link with the owners** and to raise awareness.



- Read more tips on puppy and kitten consultations in the **Veterinary Focus magazine**

8 TRANSITION TO ADULTHOOD

Accompany the pet **until adulthood is reached** and make sure they transition at the **right time** to the **right nutrition**



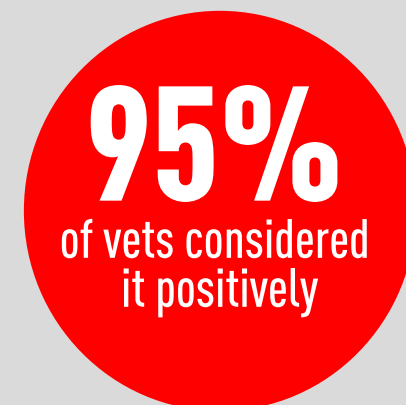
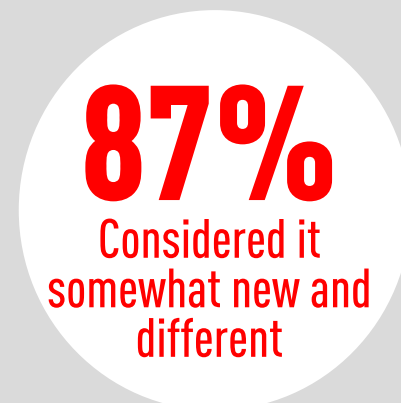
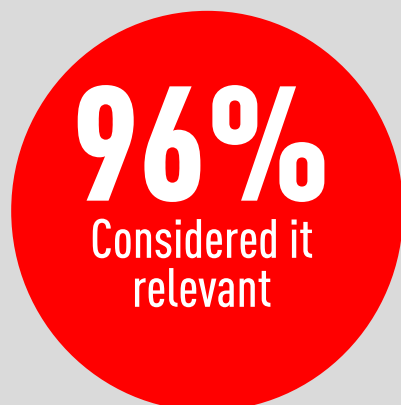
- Use the **growth tools** to illustrate the end of growth and transition to adulthood
- Refer to the **VHN Health Management materials** for the next stage diets'



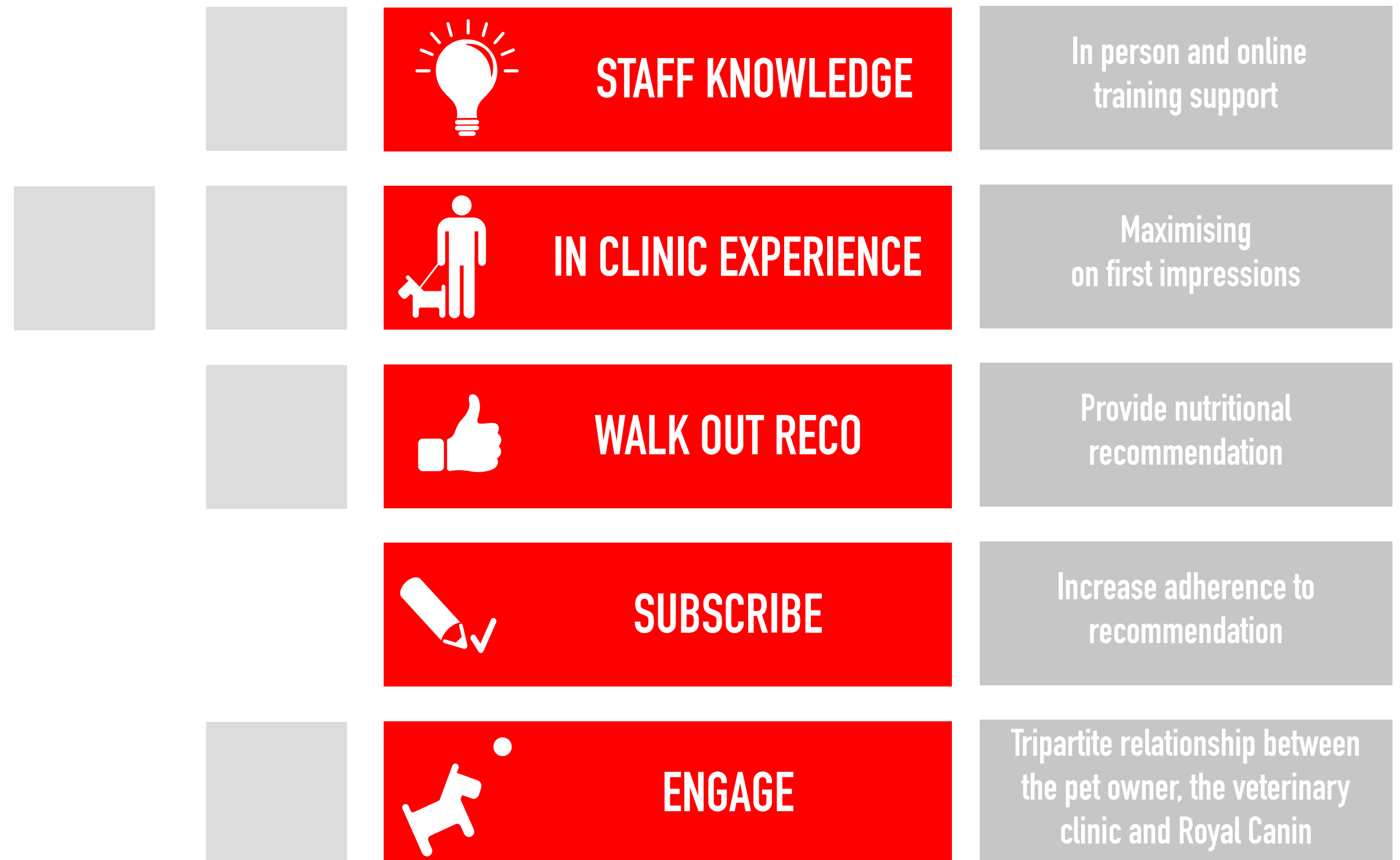
DIFFERENTIATE YOUR CLINIC

ROYAL CANIN OFFERS A PRACTICAL APPROACH, TAILORED TO YOUR CLINIC, FOCUSED ON FIVE DRIVERS PROVEN TO GROW NUTRITIONAL RECOMMENDATIONS

Tested and proven results



proven results in over **300 clinics** in the UK and Ireland





OUR COMMITMENTS

COMMITMENTS TO THE PETS, PEOPLE AND PLANET



OUR COMMITMENTS WITH OUR PARTNERS

Royal Canin continues to collaborate and partner with leading veterinary colleges and universities, breeders, and other pet experts to better understand pet health nutrition.



OUR COMMITMENTS TOWARD THE PLANET

At Royal Canin, we believe a better world is a healthy planet, where we value the environment in which our pets and their owners live.



START OF *Life*

