Domestic Pet Care Industry

Brief Facts
- Pet Care Industry in 2016 stands at $1.22 Billion
- Biggest contributor to this industry is the Pet Food Industry
- Constituting 85% of pets, dogs are the most popular companions in India
- North India accounts for highest number of pets
- Cats and Fishes are the most popular choices in South India

Components of Pet Care Industry

- Pet Boarding
- Pet Breeding
- Pet Food
- Pet Training
- Pet Vaccination
- Pet Grooming
**Domestic Pet Food Industry**

- **Number of Stray Dogs in India**: 25 M
- **Number of Pet Dogs in India**: 4 M
- **Number of Pets adopted every year**: 600,000
- **% of pets who are given Pet Food**: 6%-7%

**Pet Food Industry ( $ ‘Million)**

- 2016: 103
- 2019E: 270
- **CAGR**: 38%

**Growth Drivers**

- Rising ownership of pets in India, especially Dogs
- Reduced average household size at 4.4, especially in cities like Gurgaon
- Stressed lives, causing a need to adopt pets as a destresser
- Treating pets as family members, thus motivating to take better care of pets
- Increased awareness of the fact that pets should be given Pet Food instead of home-made food
- Increased number of pet shops, providing access to the pet owners to pet products
- Online sales of pet products enabling sales and delivery to the remotest of locations in the country
Top 5 Pet Food Brands in India

1) **Pedigree** – Largest selling Dog food brand in India. Owned by Mars Incorporation, pedigree was launched in 2008. [http://www.pedigree.in/](http://www.pedigree.in/)

2) **Royal Canin** – Royal Canin has 45 years of experience in Pet Nutrition products. Their portfolio has wide range of Dog foods categorized as per breed, age, nutrition requirement and health of the dog. [http://www.royalcanin.in/](http://www.royalcanin.in/)

3) **Drools** – It is widely available dog food brand in India. One of the oldest brands in the country, their affordable prices are one of the biggest factors of their success. [http://www.drools.in](http://www.drools.in)

4) **Hills Pet Food** – Group of professionals creating Pet Foods since decades. Their products have a balanced mix of all natural ingredients such as Chicken, vegetables, rice, brown rice, flaxseed, etc. [http://www.hillspet.com/](http://www.hillspet.com/)

5) **Taste of the Wild** – It offers “grain-free” pet foods which are based on Dog’s ancestral diet. Their grain-free foods are easily digestible and have loads of antioxidants and minerals, ideal for dog’s proper growth. [http://www.tasteofthewildpetfood.com/](http://www.tasteofthewildpetfood.com/)

Latest Deals in this space

- **Mars’ acquisition of Eukanuba** – Mars International India Pvt. Ltd. Acquired brand Eukanuba from Procter & Gambler for $ 2.9 Billion in April 2014.
- **Ratan Tata invests in DogSpot.in** – DogSpot.in raised an undisclosed amount as funding from Ratan Tata, in January 2016.
Domestic Aquaculture Feed Industry

Types of Fish Feed

- Processed feed
- Live Fish Food
- Frozen and Freeze-dried food
- Fresh Food

Industry Insights

- As per Yes bank report, Aquaculture feed demand projected to touch 7 Million tonnes by 2017-18 based on 1.5 feed conversion ratio
- Existing capacity utilisation stands at a mere 43.4%, and the remaining demand is met through imports, implying that there is a huge scope in aqua feed
- Cultured Shrimp production growing at 16% CAGR
- Demand from Shrimp, which stands at 1 Million Tonnes currently, would drive the Aqua Feed industry growth to 6%
- 13 Shrimp feed mills in India

Number of Aqua Feed Mills in India: 26

Installed Capacity in Shrimp Sector: 2.88 M Tonnes
Installed Capacity in Fish feed Sector: 1.55 M Tonnes

Actual Production in Shrimp Sector: 1.33 M Tonnes
Actual Production in Fish feed sector: 684,000 Tonnes

Actual Production: 1.25 M Tonnes

572,000 Tonnes + 684,000 Tonnes = 1.33 M Tonnes

1.55 M Tonnes + 1.33 M Tonnes = 2.88 M Tonnes
# Indian Broiler Group

## Company Overview
- Established in 1985
- Growing Conglomerate company
- Headquartered in Rajnandgaon, Chhattisgarh
- 8,000 employees
- Topline of INR 20 Billion*

## Product Range
- Drools – high protein pet food brand, launched in 2010
- Poultry
- Edible Oil and Soybean Meal
- Feed
- Dairy

## About Drools
- Launched in 2010
- Premium quality and high protein pet food brand
- Market share increased to almost 11% within 5 years
- Sales through online (website + ecommerce portals) as well as offline routes
- Wide range of vegetarian and non-vegetarian products including Puppy Chicken and Egg, Adult Chicken and Egg, Puppy 100% Vegetarian, Adult 100% Vegetarian, etc.

## Target Market
- Pan India

## Management
- Mr. Sultan Ali (Chairman)
- Mr. Bahadur Ali (Managing Director)
- Mr. Zeeshan Bahadur (Director)
- Mr. Fahim Sultan (Director)

* Financial are based on what we heard in the industry; need to be verified from regulatory filings
### Company Overview

- A flagship company of Allana Sons Ltd.
- One of India’s largest manufacturer and exporter of processed food products, agro commodities and dried pet treats/ pet chews
- Designated by Government of India as ‘Five Star Trading House’
- Also world’s largest producer and exporter of Frozen Halal Boneless Buffalo Meat
- Corporate office in Mumbai
- Factories located in Sahibabad, Unnao, Aurangabad and Zaheerabad

### Product Range

- Alpets (Pet Food)
- Proteins
- Coffee
- Rendered Products
- FMCG
- Agri food products
- Leather

### About Alpets

- Pet food brand of Frigorifico Allana Ltd
- Manufacture and export wide range of pet food products including pet treats, pet chews, natural dog food, dried chews, bones, etc.
- Certifications include ISO 9001:2000 and HACCP, and also ISO 14001
- Sales through online (website + ecommerce portals) as well as offline routes

### Target Market

- Pan India
- Europe
- Middle East
- Japan
- Australia
- USA
Pet Care Industry
Pet Food Industry
Aquaculture Feed Industry
Prospective Pet Food Companies
Prospective Aquafeed Companies
<table>
<thead>
<tr>
<th>Company Overview</th>
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<tbody>
<tr>
<td>- Established in 1992</td>
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<tr>
<td>- Headquartered in Andhra Pradesh</td>
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<tr>
<td>- Manufacturers of Fish Feed</td>
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<td>- First Indian company to provide aquaculture healthcare facilities</td>
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<tr>
<td>- First unit set up in April 2010 with an installed capacity of 120,000 tons per annum</td>
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<td>- Second unit opened in 2013 with an installed capacity of 180,000 tons per annum – equipped to produce shrimp feeds along with other aqua feeds</td>
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<td>- Markets include India and abroad</td>
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<table>
<thead>
<tr>
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<tbody>
<tr>
<td>- Shrimp Feeds</td>
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<tr>
<td>- Nutriva Feed</td>
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<tr>
<td>- Marigold Feed</td>
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<tr>
<td>- Nutrimo Feed</td>
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<tr>
<td>- Tigeron Feed</td>
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<td>- Fish Feeds</td>
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<td>- Growfin Feed</td>
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<td>- Growmax Feed</td>
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<td>- Nutrila Feed</td>
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<tr>
<td>- Carpmax</td>
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<tr>
<td>- Ornamental Fish Seeds</td>
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<table>
<thead>
<tr>
<th>Management</th>
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<tr>
<td>- Dr. M. S. Ranga Chary (Chairman) – Doctorate in Pharmacy from Frankfurt University, Germany. Has 20 years of industrial experience in R&amp;D, manufacturing and marketing in India and abroad. A guiding factor for the group and active in operations of the company.</td>
</tr>
<tr>
<td>- M.V.N Sesha Chary (Executive Director) – Science Graduate and a Chartered Accountant, with 26 years of post-qualification experience. Takes care of Commercial and Financial aspects of the company.</td>
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<tr>
<td>- Mr. P.S. Narendra (Executive Director) – Mechanical Engineer by qualification. With an experience of over 20 years in the Aqua Industry, he takes care of production and marketing activities of the company.</td>
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</tbody>
</table>
# Deepak Nexgen Feeds Pvt Ltd.

## Company Overview
- Established in 2000
- Manufacturers of Aqua, Cattle and Poultry feed
- Around 100 employees
- ISO 9001:2008 and GMP Certified
- Dedicated R&D Centre in the name of Golden Aqua Farms
- Markets include India and abroad

## Product Range
- Shrimp Feed
- Fish Feed
- Poultry Feed
- Cattle Feed
- Other Special Feeds – Sheep/Goat Feed, Emmu Feed, Koji Feed

## About Aquaculture Feed
- Shrimp Feed
  - Tiger Prawn
  - Scampi Prawn
  - Vennamei Prawn
- Fish Feed
  - Rohi Fish
  - Catla Fish
  - Fungus Fish, etc.

## Management
- Mr. M. Sudhakar Reddy (Managing Director)