

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 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

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*

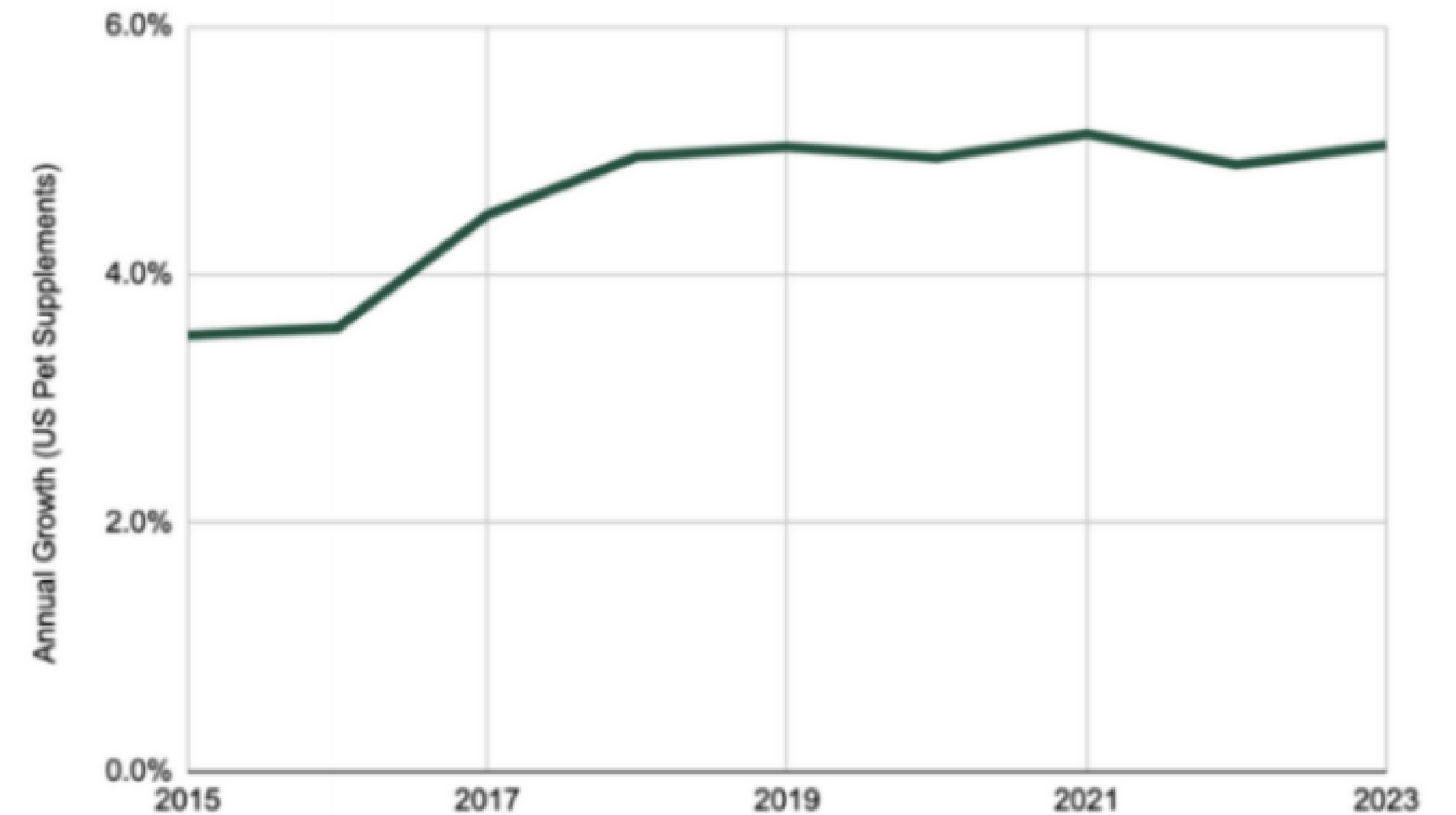
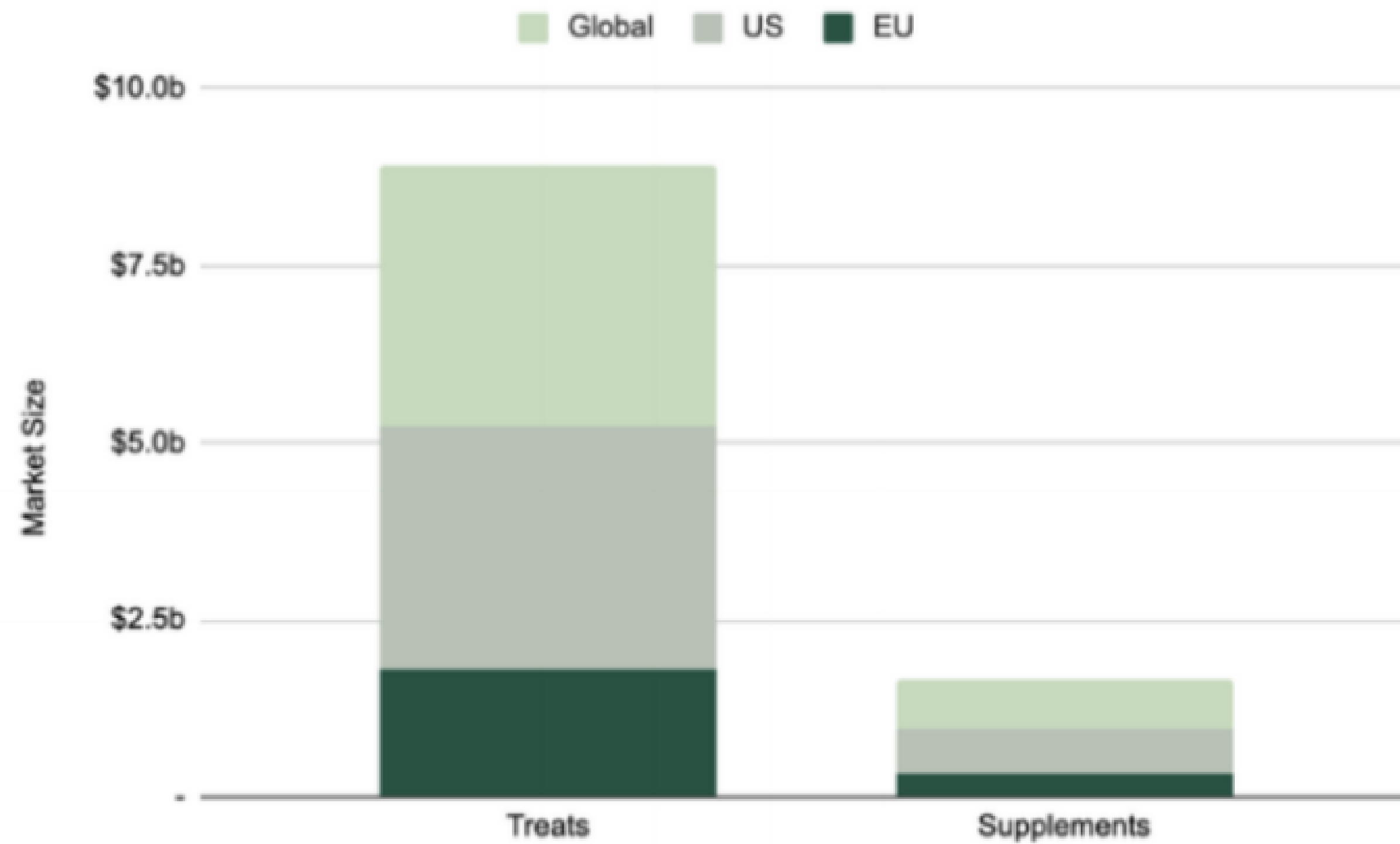
Chris has helped build and align leadership teams for some of the world's most exciting startups.

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.

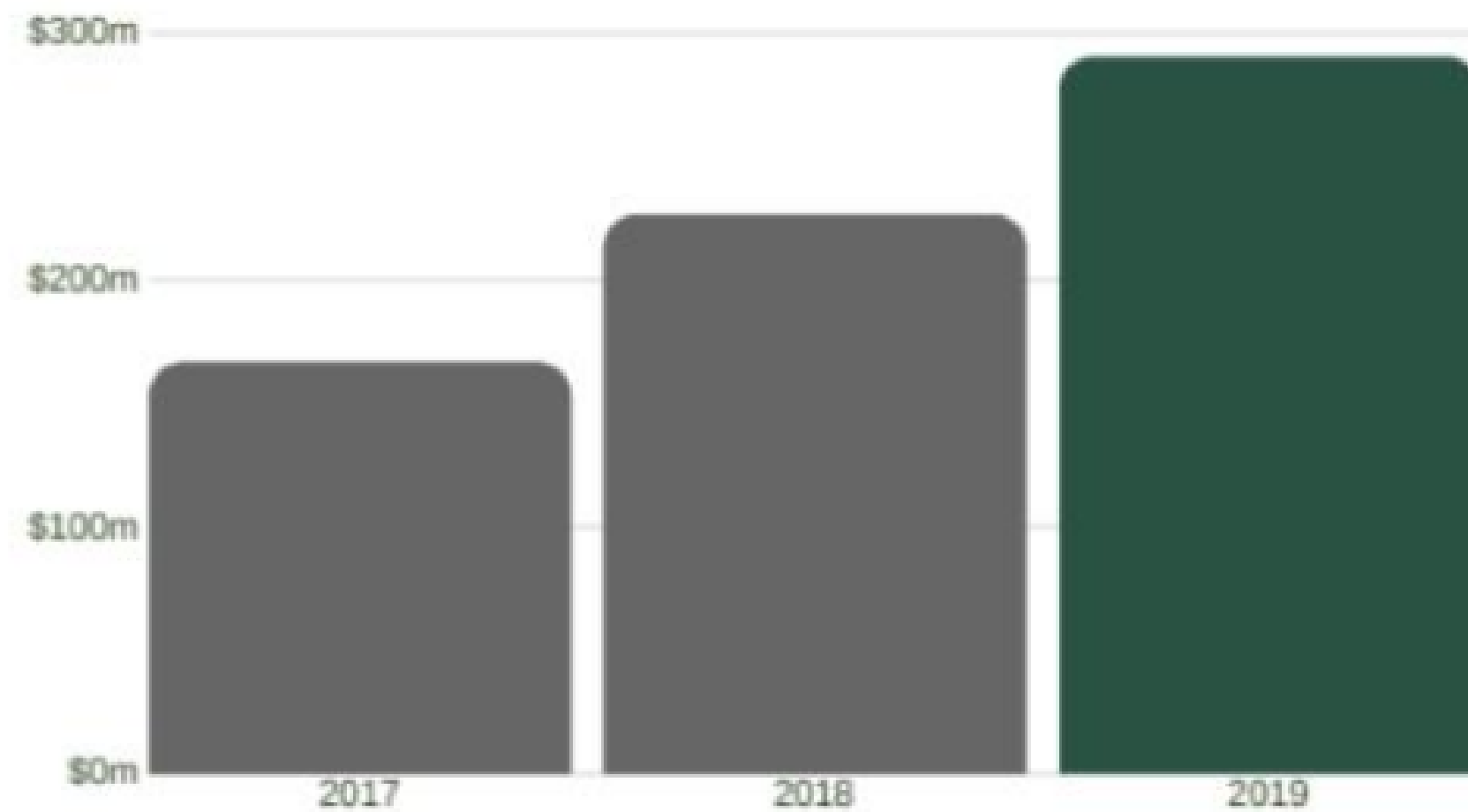
The market opportunity is big - and getting bigger



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

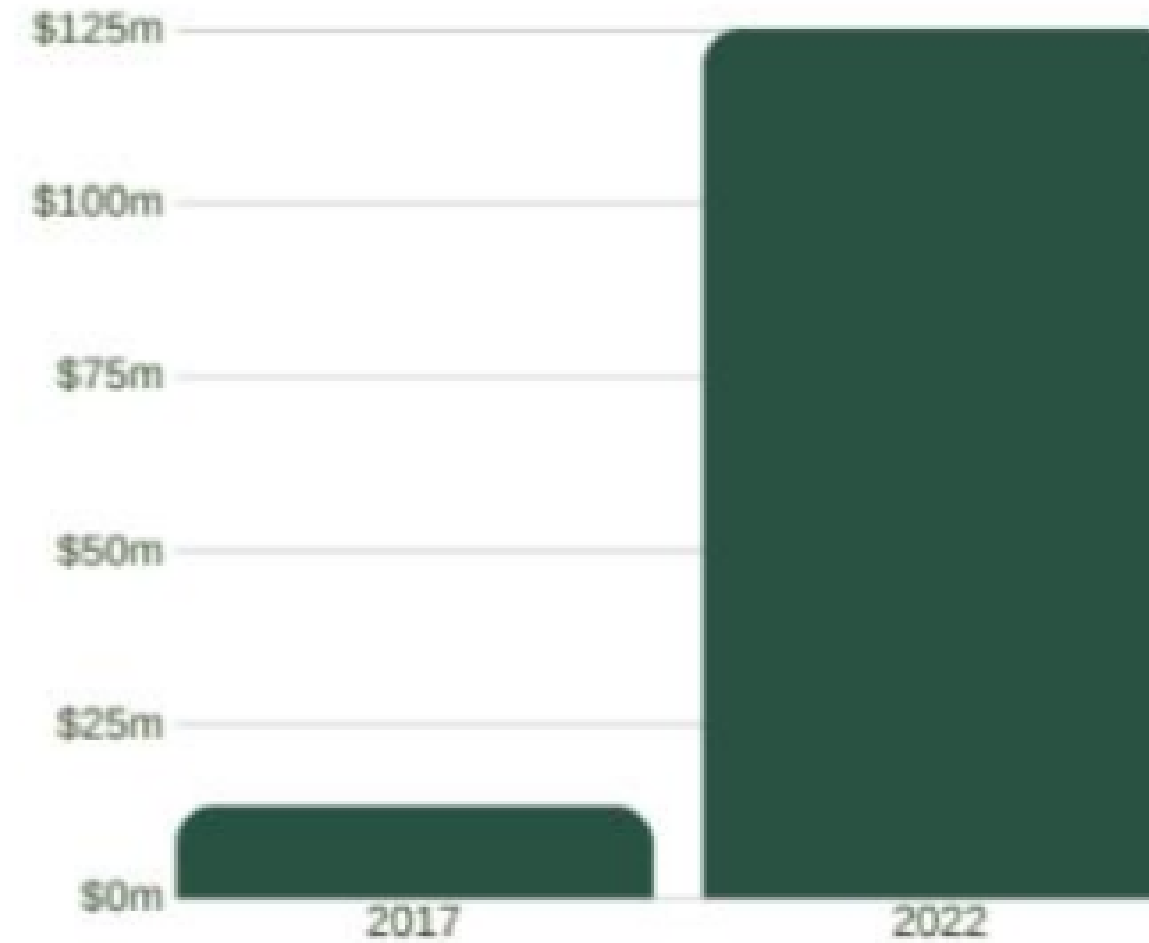
We're jumping on fast-growing trends

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



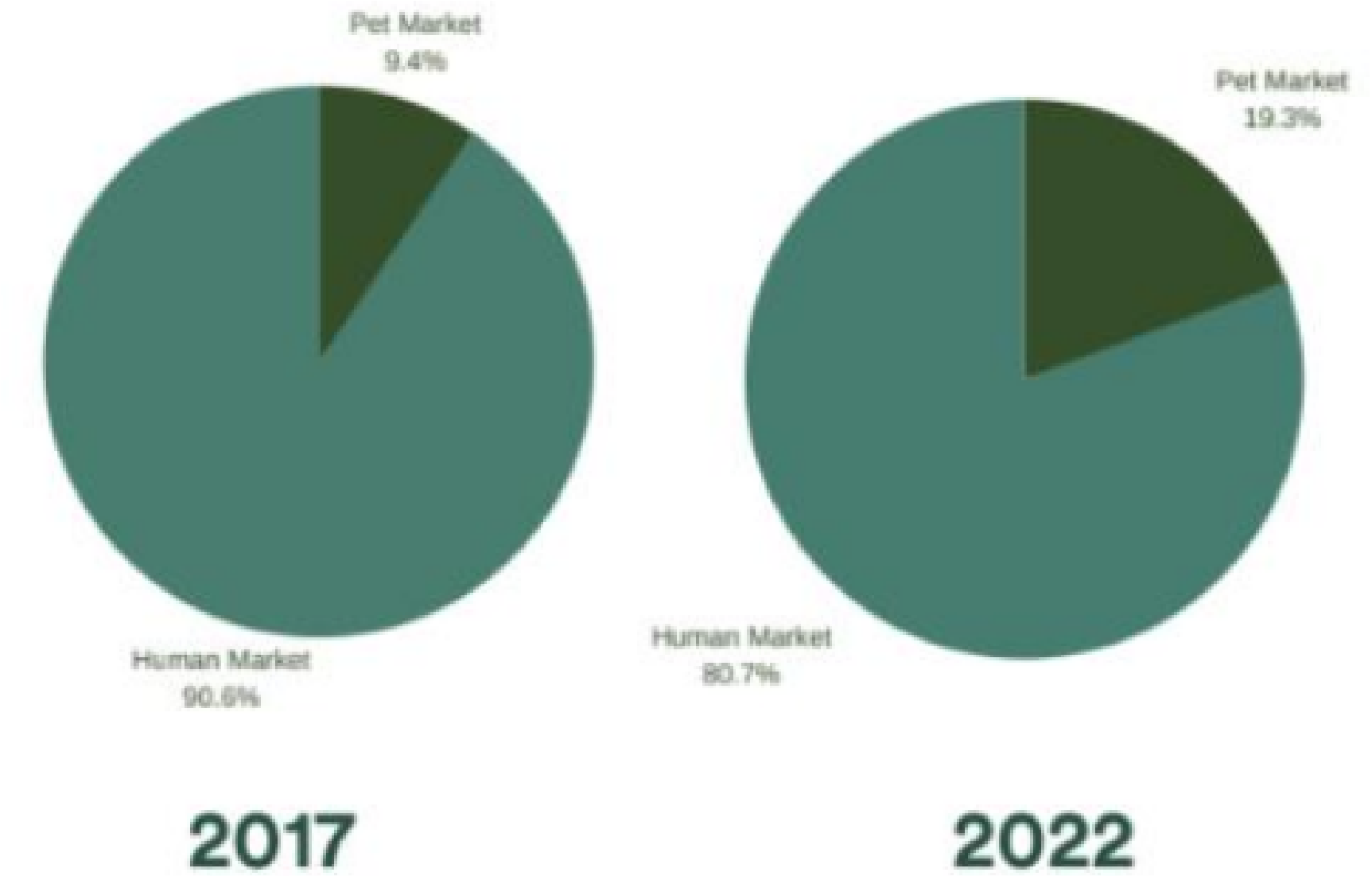
Source: Packaged Facts - Pet Supplements in the U.S. 7th Edition

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:

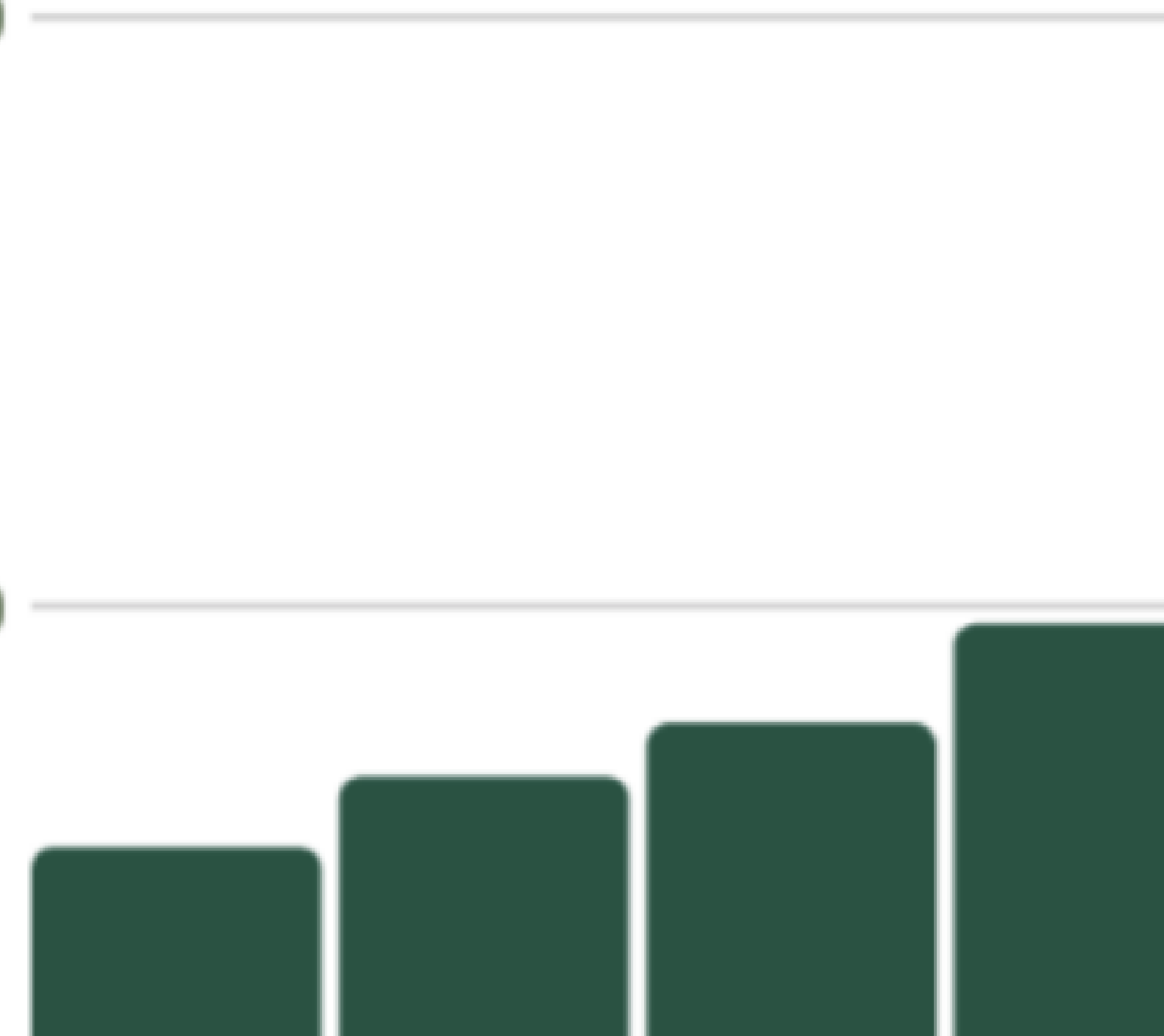
Pet trends follow human ones - and the market le

US Human Supplement Sales, 2016 - 2024

Annual Growth: 7.5%

\$60b

\$40b



Thank you.



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