



THE STATE OF PETCARE:

HOW CAN LEGACY BRANDS RECLAIM THE NARRATIVE?

THE PET CARE BOOM HAS A DARK SIDE: FRAGMENTATION, FATIGUE AND FIERCE NEW COMPETITION

Rapid category growth has flooded the market with claims, formats and philosophies, leaving shoppers confused and brands blurred.

Challenger brands are stealing loyalty by being more distinctive, relatable and human.





LEGACY PLAYERS RISK BECOMING INVISIBLE IF THEY DON'T RESPOND WITH FOCUS & CLARITY.





LEGACY BRANDS ARE LOSING GROUND, BUT THEY'RE SITTING ON UNTAPPED SUPERPOWERS

IN THE UK ALONE, THE PET CARE MARKET IS EXPECTED TO REACH

\$20.5bn BY **2033**

IMARC

Trust, recognition, and retail scale are powerful advantages, but rarely activated in a modern way.

Consumers still want reassurance from big players... if they show up with relevance.

THE UNLOCK:

The opportunity is not to mimic start-ups, but **modernise what made you iconic.**

A NEW GENERATION OF PET PARENTS ARE REDEFINING WHAT 'GOOD' LOOKS LIKE

Gen Z and Millennials treat pets like children, expecting the same ethics, care and quality they want for themselves.

They want custom nutrition, wellness benefits and brands that align with their values.

THE UNLOCK:

Familiarity isn't enough. This generation buy into **purpose, not just products.**

Gen Z & Millennials value brands that are authentic and relatable

Gen Z spend more on their pets than any other generation

NEWSWEEK



THIS ISN'T JUST ABOUT INSIGHT. IT'S ABOUT ANTICIPATION.

Great brands don't just track culture,
they bet on what's coming next.

THE UNLOCK:

Fast moving categories reward those who can **build pipelines around shifts, not trends.**
We help clients see further, so **innovation is proactive – not reactive.**



86% of pet owners
shop for their pets
online, driven by
Gen Z and Millennials

EXPLODING TOPICS



HMC

DTC AND SUBSCRIPTION START-UPS ARE REWRITING THE RULES OF ENGAGEMENT

The most exciting brands are
bypassing retail entirely and
building data-rich, high-margin
relationships.

They know who their customer is,
what they buy and when to upsell,
legacy brands often don't.

THE UNLOCK:

These platforms aren't just
selling food. They're building
loyalty ecosystems.



WHEN THE SHELF SHRINKS, YOUR BRAND MUST EXPAND IN MEANING

Winning on shelf is no longer about pack shouting. It's about **emotional connection**. Legacy brands need to **re-earn their place in consumers' lives**, not just in baskets.

THE UNLOCK:

This means **sharper brand codes, clearer benefit systems,**
and a more **human tone**.

THE CATEGORY IS CROWDED - YOUR LEGACY IS THE SHORTCUT TO CLARITY

While others complicate, you have the right to speak with confidence.

Modern pet parents don't want products, they want a philosophy, so your purpose and lifestyle cues matter as much as price or formulation.

THE UNLOCK:

Brands that **explain, demystify** and **guide** will win the next generation.

44% of dog owners are confused by contradictory advice on food for their pet

THE INDEPENDENT



FUNCTIONAL



THERE'S A MASSIVE
OPPORTUNITY TO MOVE
FROM A FUNCTIONAL TO
EMOTIONAL TERRITORY

“Natural” and “healthy” are just
table stakes – the real value lies in
what those benefits mean.

THE UNLOCK:

It's time to reframe your offer
in ways that are **distinctive**,
relevant and **memorable**.

EMOTIONAL



A photograph of a person's legs in khaki pants and brown leather shoes, holding a brown leather leash. A golden retriever is sitting on a light wood floor, looking up at the person. The background is a plain, light-colored wall.

YOU DON'T NEED A REVOLUTION, YOU NEED A REINTRODUCTION

THE UNLOCK:

This isn't about ripping it up and starting again.
It's about **showing up differently**. The same story, told
through a **modern lens**, can feel radically fresh.

HOW TO SPEAK PETCARE'S NEW LANGUAGE WITHOUT LOSING YOUR OLD VOICE



Use your brand's history as a shortcut to creating clarity



Bridge the gap between trust and trend with a smart tone of voice



Ensure visual identity, voice and structure can all flex across shelf, online and DTC



Reframe your offer from functional to emotional



Find a distinct purpose and lifestyle to create a human and memorable brand

THE UNLOCK:

At Haines, we help brands **evolve without losing who they are.**

INNOVATION ISN'T A PET PROJECT, IT'S A SURVIVAL STRATEGY

NPD can't just be reactive, it needs to create meaning and drive margin. Functional needs, life stage relevance and wellness cues offer rich opportunity.

THE UNLOCK:

At Haines, we help clients plan for **now**, **next** and **beyond**, with ideas that earn their keep.

A BIT ABOUT HAINES...

OUR MISSION

MAKE LEGACY BRANDS FEEL LIKE LEADERS AGAIN

We turn heritage into hard advantage with strategic creativity that performs.

Whether you need fresh thinking or future-proofing, we know how to unlock growth.

This is brand consultancy built for the modern petcare battlefield.

WHAT WE DO

BRAND GROWTH & INNOVATION

BUILT FOR MODERN PET CARE



Culturally smart, commercially focused strategy across innovation and brand.



Innovation pipelines, brand reboots and “How to Win” plans that actually get used.



Deep experience in petcare, from challenger brands to category giants.

PROOF WE DELIVER

GROWTH THAT'S CREDIBLE, DISTINCTIVE & CONSUMER-FIRST

Our work has helped brands like Harringtons and James Wellbeloved outpace the market.

We blend insight with execution, never strategy that sits on a shelf.

Category awards, sales spikes and loyal fans to prove it.



THE NEW NATURAL

UNCOVERING DRIVERS & BARRIERS



THE CHALLENGE

Harringtons wanted to become a top brand in Natural Wet Dog Food. We were asked to provide emotive, behavioural and attitudinal insights into how and why shoppers are purchasing natural.

THE UNLOCK

Understanding the emotive and functional drivers and barriers behind Natural Dog Food, unpacking usage and feeding occasions and investigating the role of retail channel.

THE RESULTS

Learnings to inform NPD, product tiering and channel strategy, identifying and recommending where Harringtons could stretch their natural roots and resonate in a credible way.

seraquin

A DISTINCTIVE IDENTITY



Boehringer
Ingelheim

EMPOWERING PET PARENTS

THE CHALLENGE

The world of pet care can feel confusing for many pet owners, and with pet nutraceuticals landscape still in its infancy, the job was to make it easy for pet owners to find simple and trustworthy solutions they can rely on.

THE UNLOCK

By placing pet owner insights at the heart of our approach, we developed a brand positioning that balances trust and reliability with clear, easy-to-use products that would empower pet owners to confidently care for their pets.

THE RESULTS

A bold, distinctive brand identity and product range across digestion, joint, skin & coat. Using thoughtful design, colour and iconography to stand out on shelf, ensuring each product is easy to understand and use at home. Ready for launch in Sept 2024.



HARNESSING SUPERFOODS

THE CHALLENGE

James Wellbeloved wanted to strengthen its emotive connection with existing consumers whilst appealing to a new Millennial mindset, the fastest growing pet owning demographic.

THE UNLOCK

Teasing apart the emotive and functional drivers of Millennials to unpack the relationship they seek with their pets and to understand how the meaning and relevance of functional and 'natural' pet food has evolved.

THE RESULTS

A winning proposition that achieved one of the highest results in quantitative research the company has ever seen. Superfoods won 'Marketing Launch of the Year' by Pets At Home, smashing it's Q1 targets and bringing new consumers into the brand!



WANT TO WIN WITH GEN Z PET PARENTS? LET'S TALK

We're helping legacy brands reclaim relevance, not just awareness. We know what modern pet parents care about and how to reach them.

If this sounds like your challenge, we should chat.

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A young couple with a small dog. The woman is wearing a yellow beanie and a brown jacket, smiling. The man is wearing a brown jacket and has a beard, looking down at the dog. The dog is a small, white and brown Chihuahua-type dog, looking up at the camera.The HMC logo is a white, stylized, bold font inside a teal circle.

HMC

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