

# PETSAPIENS

Seed Round 2026

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## Science-Led Preventive Nutrition

Building India's First Genuine

Pet Nutrition Brand

Supplements | Functional Food

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₹2.73 Cr

FY 2025-26  
Revenue

• ₹23L

MRR

• 246%

Revenue Growth  
FY25 → FY26

Food Dominated Market

Low Supplement Penetration

Reactive Healthcare

No Lifecycle Ownership

Structural Gap

= Category Opportunity

# The Indian Pet Nutrition Market Is Structurally Inefficient

## 01 Nutritional Gap in Daily Feeding

Most pet parents feed homemade diets with no structured supplementation. Nutritional gaps are invisible until symptoms appear — by which point reactive vet visits replace preventive nutrition.

## 02 No Trustworthy Local Supplement Brand

Imported brands price out 90% of Indian pet parents. Local alternatives use inferior actives — no UC-II, no clinically dosed formulations. Neither builds trust through science.

## 03 No Single Brand Owns the Nutrition Relationship

Pet parents buy food from one brand and supplements from another. No single brand owns the complete nutrition relationship — monthly spend stays fragmented and unretained.

## 04 Supplement Category Still in Early Formation

Supplements represent a high-margin recurring vertical still in early formation in India. No organised science-led brand has claimed category leadership yet. This is the open door.

### OUR WEDGE

**Supplements-first strategy** → Food launch H2 FY26–27 to own the full nutrition lifecycle

## MARKET STRUCTURE

### TAM

~₹60,000 Cr

India Pet Care Market

by FY28P · ~\$7.5 Bn

### SAM

₹20,000–24,000 Cr

Pet Nutrition (Food + Healthcare)

by FY28P · ~\$3 Bn

### SOM · BEACHHEAD

₹2,500–3,000 Cr

Organised Online Pet Supplements

by FY28P · only 6–8% online today

# Large, Fast-Growing, Under-Penetrated

## TAM — India Pet Care

- ~₹60,000 Cr (~\$7.5 Bn) by FY28P — 18–20% CAGR (RedSeer 2024)
- 32M+ pets in Indian households; growing at 4–5% annually
- Spending per household still at 0.10 vs 1.06 in USA — massive headroom

## SAM — Pet Nutrition

- Food (\$0.5 Bn FY24 → \$1.2–1.4 Bn FY28P) + Healthcare products (\$0.8 Bn → \$1.6 Bn)
- Fastest-growing subsegment · Monthly recurring purchase behaviour
- 50% of packaged food buyers driven by vet recommendations — trust-first market

## SOM — Supplements (Our Entry Point)

- Online petcare is only 6–8% of market today — early mover wins category
- High-margin (60–75%) category · Faster repeat cycle than food
- No organised science-led supplement brand owns this space in India yet

### WHY THIS CATEGORY WINS

₹60,000 Cr TAM · High-margin recurring revenue · 6–8% online today — we enter at the right time

Source: RedSeer — 'From Kibble to Care: Understanding India's Evolving Petcare Market', 2024

[redseer.com/wp-content/uploads/2024/10/Indias-Petcare-Market-Opportunities-in-an-Evolving-Market.pdf](https://redseer.com/wp-content/uploads/2024/10/Indias-Petcare-Market-Opportunities-in-an-Evolving-Market.pdf)

01

## Retention Infrastructure

WhatsApp CRM + Bundles + Subscription Engine

02

## High-Margin Category

60–75% Gross Margin · Faster Repeat vs Food

03

## Supplements-First Strategy

Beachhead in Early-Stage Preventive Category

04

## Data-Led Nutrition Expansion

Food Launch in 3-4 Months → Own Monthly Cycle

*Foundation → Execution → Expansion*

# Why PETSAPIENS

## Execution + Category Tailwind

01 + 02

### Strong Early Traction

- ₹2.73 Cr FY25-26 Revenue · ₹23L MRR · 2.46x YoY Growth
- Supplement mix: 11% in December → 49% in March — 4.5x in 4 months
- Amazon + D2C + Blinkit · ACOS maintained at ~16%

02 + 03

### Structural Advantage

- Supplements underpenetrated in India
- 60–75% gross margin · High-margin recurring model · Low SKU high velocity

03 + 04

### Clear Expansion Path

- Functional food launching in 6–12 months → own full nutrition lifecycle
- Blinkit already live and scaling · Supplement SKU depth expanding
- Fast SKU launch cycle with validated demand + science-led formulations ready

**Proven model.** ₹2.73 Cr revenue bootstrapped on a side job. Full-time founder + seed capital = the only variable missing.

## PRODUCT ECOSYSTEM

PHASE 1 · NOW

# Foundation

Accessories cash flow funds supplement growth

PHASE 2 · NOW → FY27

# Scale

Supplements become primary revenue engine

PHASE 3 · H2 FY26–27

# Own

Food + Supplements = Full nutrition lifecycle

### Smart bootstrapping:

Accessories funded supplement growth.  
Supplements fund food launch.

# Built to Own the Complete Nutrition Lifecycle

REVENUE FOUNDATION · TRANSITIONING OUT BY Q2 FY27

## Accessories (Pee Pads + Orthopedic Beds)

*Amazon marketplace velocity funded supplement R&D + inventory without any external capital.*

**₹1.5 Cr+**

FY25-26 Revenue

CURRENT GROWTH ENGINE · PHASE 2

## Core Supplements

**GutPro+ · StridePro+ (Joint)** · Skin & Coat (Q1 FY26)

60–75% gross margin · High repeat cycle · 11% → 49% mix in 4 months

**49%**

Revenue Mix Mar'26

PHASE 3 · LAUNCHING H2 FY 26–27

## Functional Pet Food

4,130+ supplement customers already trust PetSapiens. Food cross-sell converts naturally.

*Supplement + food bundles · Own full nutrition lifecycle · Maximum LTV*

**Monthly**

Retention Lock

WHY THIS STRUCTURE WORKS

**₹1.5 Cr+**

Accessories funded operations (FY26)

**49%**

Supplement mix already in March

**4,130+**

Customers ready for food launch

## 22 MONTH PERFORMANCE

FY24 – Mar 2026

# ₹23L

March MRR (Amazon ₹17L + D2C ₹5.93L)

## ₹3.52 Cr

FY25-26 Revenue

## 94.4%

D2C Supp. Mix Mar'26

### REPEAT RATE

# 14.14%

Last 3 months (Jan – Mar 2026)

Amazon + D2C + Blinkit + Zepto · All live

Amazon (May'24) · D2C (Oct'25)

**Blended margin expands** as D2C + supplement mix increases

# Disciplined Contribution Model

D2C — petsapiens.in (Oct'25 – Mar'26)

AOV

## ₹1,112

Gross Margin

## 64.1%

CM1

## 52.3%

CAC

## ₹647

Payback

## <1 Month

Amazon Marketplace (May'24 – Mar'26)

AOV

## ₹2,219

Gross Margin

## 64.82%

Platform Fees

## 30.63%

ACOS Target

## 15.77%

CM2

## 4.35%

## SUPPLEMENT STORY

Supplement % of Total Revenue — Amazon + D2C

# 49.22%

Total Supplement Mix — March

# 98.91%

D2C Revenue from Supplements — March

# 32.44%

Amazon Revenue from Supplements — March

# 4.5x

growth in supplement mix  
in just 4 months  
**10.97% → 49.22%**

# Supplements Taking Over

Supplement % of revenue — 4-month trajectory across Amazon, D2C, and blended total



## MONTHLY TOTAL REVENUE (AMAZON + D2C)

DEC	JAN	FEB	MAR	AMAZON QUARTERLY REVENUE FY25-26				TOTAL
₹30L	₹20L	₹17L	₹23L	Q1	Q2	Q3	Q4	₹270.09L
10.97%	27.44%	36.09%	49.22%	₹56.93L	₹65.35L	₹88.61L	₹59.20L	

## MULTI-CHANNEL ENGINE

### CURRENT REVENUE MIX

#### 01 AMAZON

~74%

of total revenue · ₹17L/month

#### 02 D2C

~26%

of total revenue · ₹5.93L/month

#### 03 QUICK COMMERCE

**Live & Scaling**

Blinkit · Growing

#### 04 INTERNATIONAL

FY26 - 27 · UAE · Singapore · Amazon Global

Blended margin improves as D2C share grows

# Margin Expands Over Time

## 01 AMAZON — Discovery Engine

Currently 4.35% CM2 → 58.7% as supplements scale

High discovery value · Reviews + search ranking · New customer acquisition · 74% of current revenue

## 02 D2C — petsapiens.in — Margin Layer

CM1 52.3% · Own customer data · CRM-led retention — 14.14% repeat rate

Bundles · Subscription engine · WhatsApp CRM · Highest margin channel at scale

## 03 QUICK COMMERCE — Already Live · Scaling

Blinkit Llive · Low incremental CAC · Urban reorder penetration

Pads · Top supplements · Convenience reorder cycle

## 04 INTERNATIONAL — FY 26 - 27

Higher pricing power · Export-ready formulations · UAE · Singapore · Amazon Global

## TRACTION TIMELINE

May 2024 – Mar 2026

01

### Capital Efficient Growth

Bootstrapped · EBITDA positive early · Lean 3–4 members team

02

### Category Validation

Supplements already 45% of revenue · Repeat visible · High AOV

03

### Ready for Scale

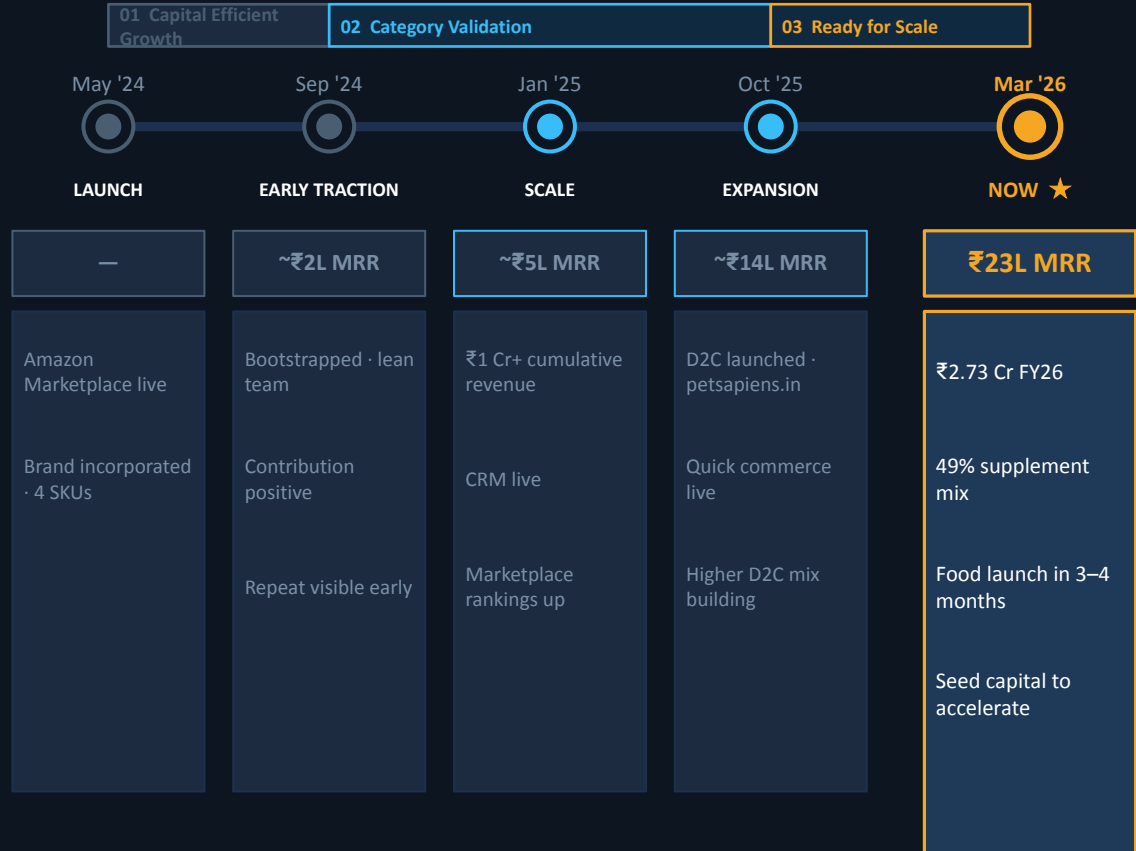
₹23L MRR · SKU expansion · D2C + QC live

## MRR GROWTH

₹0 → ₹23L

in 22 months, bootstrapped

# Built with Discipline. Scaling with Intent.



## GROWTH FLYWHEEL

### HOW THE LOOP WORKS

#### 01 Amazon

*Customers discovered →*

#### 02 D2C

*Data owned, margin higher →*

#### 03 CRM

*Repeat orders, ₹0 CAC →*

#### 04 LTV Expansion

*Basket grows, loops back ↻*

#### REPEAT ORDER ADVANTAGE

# ₹0 CAC

*on every repeat order · 14.14% repeat rate*

Acquire → Convert → Retain → Expand

## Structured Growth Flywheel

#### 01 AMAZON DISCOVERY

~74% of Revenue · ₹17L/month

- High intent search traffic
- Review-based trust building
- Sponsored Ads + SEO rankings

#### 02 D2C CONVERSION

CM2 52.3% · Own customer data

- Higher gross margin vs Amazon
- Own customer data
- Bundles · Starter kits · Landing pages

#### 03 RETENTION ENGINE

14.14% Repeat Rate · ₹0 CAC on reorders

- WhatsApp-first communication
- Refill nudges
- Auto-subscription incentives

#### 04 LTV EXPANSION

Food in 3–4 months · Basket grows

- Food introduction
- Supplement + food bundling
- Quick commerce reorders

## CORE BUYER SEGMENTS

### URBAN FIRST-TIMER

Tier 1 / Tier  
Age 25–35

- New pet parent
- High anxiety, high research
- Education-driven buyer
- Strong subscription potential

High LTV Potential

### TIER 2 EMERGING

Tier 2 / Tier 3  
Age 28–40

- Rapidly humanising pets
- Amazon-first discovery
- Price-sensitive but trust-driven
- High volume segment

Large TAM Segment

### MULTI-PET HOUSEHOLD

All Tiers  
Age 35–50

- 2+ pets
- Highest AOV
- Buys bundles
- Repeat-heavy

Highest Margin Segment

## Segmented for Revenue Efficiency

### 01 Acquisition Layer

- Amazon search & Meta ads
- Pet symptom intent targeting
- Education-led content

### 02 Conversion Layer

- Starter bundles
- Trust-based product positioning
- ₹1864 AOV benchmark

### 03 Retention Layer

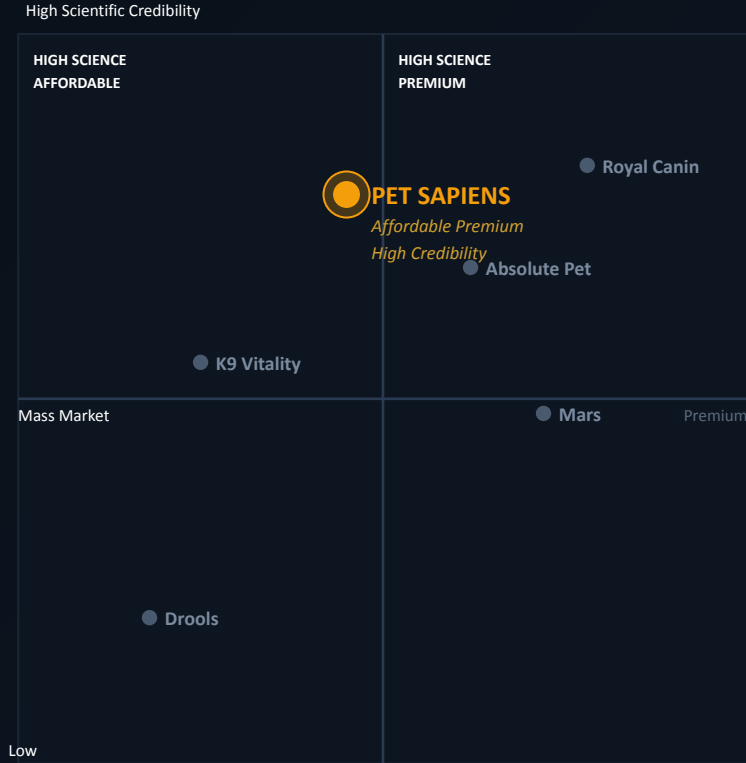
- WhatsApp CRM
- Refill reminders
- Subscription incentives

### 04 Expansion Layer

- Food introduction
- Bundle upgrades
- Multi-pet offers

LTV increases as customers move from first purchase → bundle → subscription → food.

## MARKET POSITIONING



# Positioned at the Underserved Intersection

## 01 Science + Accessibility

Clinical positioning without imported price barrier

## 02 Supplements-First Focus

Dedicated preventive nutrition strategy

Not just food-led brand

## 03 Digital + Retention Infra

WhatsApp CRM · D2C + Marketplace mix

Subscription-ready architecture

Feature	PetSapiens	Drools	Royal Canin	K9 Vitality
Science-Led Formulation	✓	—	✓	—
Supplements Focus	✓	—	—	✓
D2C + Amazon	✓	✓	—	—
Subscription Infra	✓	—	—	—

## PHASED SCALE STRATEGY

PHASE 1 — (H1 FY 26-27)

### Supplements Leadership + Food Launch

- Expand supplement SKU depth
- Launch functional pet food
- Increase D2C mix
- Quick commerce entry

PHASE 2 — FY 26–27

### Channel Expansion + Retail Presence

- Modern trade entry
- Vet partnerships
- International expansion (UAE, Singapore)
- 30+ SKU portfolio

PHASE 3 — FY 27–28

### Personalised Nutrition + Category Expansion

- AI-led nutrition plans
- Subscription ecosystem
- Diagnostics exploration
- Brand leadership positioning

# Built for Scalable Expansion

## 01 Category Depth

Supplements → Food → Full Nutrition Stack

## 02 Channel Expansion

D2C margin expansion  
Quick commerce penetration · Retail footprint

## 03 Margin Discipline

High-margin core category  
Controlled SKU expansion · Blended margin improvement

## 04 Series A Readiness

Revenue scale · Stronger repeat behaviour  
Food-led LTV expansion

**Goal:** ₹12 Cr ARR with strong contribution margin before Series A.

## FOUNDING TEAM

NK

**NITISH KAJALA**

**CEO & Co-Founder**

### CORE FOCUS

- Brand strategy & positioning
- Product roadmap & formulation
- Fundraising & partnerships
- Overall business strategy
- D2C and amazon growth

*Strategic operator + category builder*

A

**ASHUTOSH**

**Co-Founder & Amazon Advisor**

### CORE FOCUS

- Amazon marketplace strategy
- Amazon P&L creation

*Growth + marketplace advisor*

## Lean Team.

## High Leverage.

### 01 Capital Efficient Growth

- Bootstrapped
- Scaled to ₹3.52 Cr ARR in 22 months

### 02 Channel Expertise

- Amazon + D2C hybrid model
- Performance-led growth · CRM retention

### 03 Category Focus

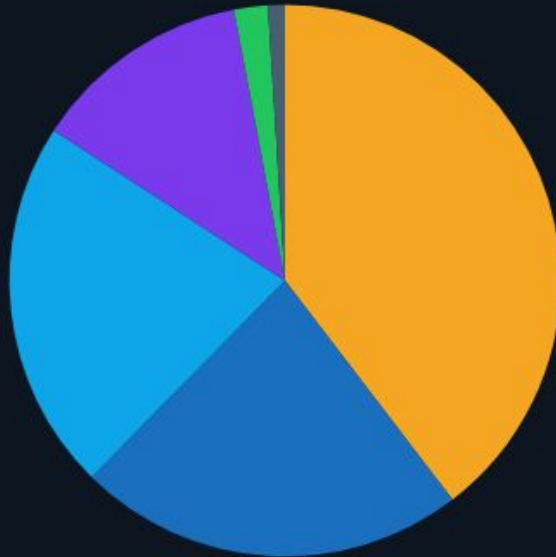
- Supplements-first positioning
- Margin discipline · Food expansion

### 04 Hiring with Seed Capital

- Marketing Lead · Operations Manager
- Brand & Content · Vet Advisor

**Building systems** before scaling headcount.

# ASK & USE OF FUNDS



- Performance Marketing — 40%
- Team & Salaries — 23%
- Product / NPD / Inventory — 22%
- Working Capital + Vendor — 13%
- CapEx — 2%
- Tech + CRM + Legal — 1%

How We'll Use

**₹2.5 Cr**

to Our Advantage

Equity Offered **15%**

Pre-money Valuation **₹14 Cr**

TARGET AT MONTH 12

**₹12 Cr+ ARR**

# Thank You

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Building India's First **Genuine Preventive Pet Nutrition Brand**