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# See you at Zoomark?

Zoomark is coming up. And if last year's Interzoo is an indication of what we'll see in Bologna, exhibitors will focus heavily on sustainability. So in this issue, we look at new EU regulations on packaging. You'll learn more about the organic cat litter category too.

Since the industry is meeting in Bologna, it seemed like the perfect time to dive into the Italian pet industry, looking at current trends, pet ownership data, and the market's challenges and opportunities. We've also interviewed the CEO of Arcaplanet, the country's largest pet retailer.

Dry food has always dominated the pet food category. How are evolving consumer preferences and price hikes impacting it? Which human food trends are influencing pet food as a whole? We dive into the fast-growing fresh food segment in Europe and related investment activities. Other ingredients and food topics featured this time are cell-based toppers, natural coloring, figs and the human-grade pet food debate.

Supply chain and inflationary pressures have been the biggest challenges the industry has seen in a while. How will that develop during 2023? We predict 5 trends on the supply chain front for the coming year. And we take stock of pricing pressures, from the perspective of both retailers and brands.

Increasing prices are driving many people to opt for more affordable, private label products. What are the current private label developments for e-commerce players? When you say e-commerce, you say 'fast delivery' too. So we show you how same-day delivery in the pet industry is progressing.

Finally, you'll discover other topics, like the use of blockchain technology, how the small pets category is evolving, and some interesting pet furniture trends.

Don't forget to stop by our Zoomark Booth (Hall 29, Booth A37). You might win a free subscription to this magazine!

See you there,

Philippe Vanderhoydonck  
Managing Director

**Zoomark 2023 – Hall 29, Booth A37**

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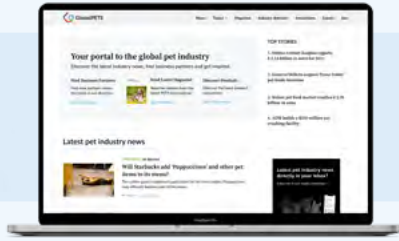
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### Relief in pet supply price hikes

The Consumer Price Index (CPI) in the US and Europe saw a stabilizing trend in pet product prices in the first 2 months of 2023, after inflation of 13.1% in 2022.

In the US, pet and pet products showed a 0.2% price increase in January and 1.1% the following month, according to the US Bureau of Labor Statistics (BLS). Prices in the UK increased by 0.7% in January and 1.9% in February.

On the other hand, some Northern European countries saw negative inflation in the category in the first 2 months of 2023. In Finland, pet food prices declined by 0.65% in January and 0.73% in February. Similarly, Norway saw a 1.7% drop in pet item prices in January.



### Swedish pet retailer ZOO.se takes over e-commerce player Tinybuddy

With the acquisition of a competitor, ZOO.se becomes the second largest pet food and products provider in Scandinavia. The Stockholm-based pet retailer will now have 14 stores in Sweden as well as an e-commerce reach across Europe, forecasting a turnover of SEK800 million (€71M / \$77M) in 2023.

Tinybuddy's Tim and Louise Jansson will take on new roles as co-owners of ZOO.se as a result of the acquisition.

### Malaysian pet food maker to raise \$100 / €92 million

Pet World Nutritions is planning an initial public offering (IPO) in Singapore by the end of the year. The company was established in 2006.

Besides Malaysia, it has facilities in Thailand and Indonesia with an annual pet food production capacity of more than 100,000 tons. In May 2022, the company announced a strategic partnership to embark on producing Malaysia's first sustainable dog food using Black Soldier Fly Larvae (BSFL) as an alternative protein source.



### Imported pet food sales jump tenfold in China

Alibaba Group data indicates that foreign pet food brands have grown from \$100 million (€92M) in 2016 to \$1 billion (€919M) in 2022. According to Alibaba, freeze-dried, functional and wet meals are China's fastest-growing pet food categories. The e-commerce giant also notes a high demand for pet supplements.

The easing of import regulations in 2016 opened the market, allowing popular pet food brands to access the country's emerging pet industry.



**Chewy: more sales, fewer active customers**

The online pet retailer Chewy saw double-digit sales growth in 2022, while its customer base went down by 340,000 pet parents. Its net sales equaled \$10.1 billion (€9.28B), up 13.6% compared to 2021.

The non-discretionary categories – consumables and healthcare – increased by 18.5% in a year, while discretionary categories, such as hard goods, did not perform well.

“Our topline expansion reflects our ability to manage the dynamic pricing environment, as well as the recurring nature of our business model, and our ability to expand share of wallet from our customers over time,” the company said.



**British natural pet food start-up Scrumbles closes large investment**

Scrumbles will use most of a £6 million (€6.8M / \$7.4M) capital injection to launch the company’s international debut, and to drive the development of its omnichannel business model. The investment will also support Scrumbles in appointing a new Finance Director and increasing its marketing to support the ongoing expansion.

The “gut-friendly” pet food company was founded in 2018 by Jack Walker and Aneisha Soobroyen.



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### Most US pet parents grapple with healthcare expenses

Research carried out by Credit Summit among 1,200 US pet parents concluded that 83% took out loans to pay for pet care expenses. As much as 31% of American pet parents are turning to predatory lenders to help with pet care, with 21% using a short-term loan and 10% utilizing a title loan.

Inflation is also causing pet parents to rehome their companions: 29% of the survey respondents handed their pets in to pet shelters because they couldn't afford the upkeep.



### Which are the UK's most popular pets?

Dogs sit at the top of the rankings in the UK, with a population of 12 million, and 31% of British households have at least 1 canine pet. Compared to the previous year, there are 1 million fewer dogs. Cat populations also dropped – from 12 million in 2022 to 11 million now – according to the latest data from UK Pet Food. 26% of British households own 1 or more felines.

Rabbits are the third most popular pet in the UK, with a population of 1.5 million in 2023. In just 1 year, their presence doubled in British households. Indoor birds perch at number 4 with a population of 1.3 million, dropping by 300,000 against 2022.

### Where did US pet food exports go in 2022?

American cat and dog food exports surged by 20% in 2022, hitting almost \$2.5 billion (€2.3B) in value, according to data from the United States Department of Agriculture (USDA).

The products mostly went to neighboring countries, and across the Pacific Ocean, with Canada as the main recipient country. US pet exports to Canada were worth \$1.12 billion (€1.03B), followed by China (\$264M / €243M), Mexico (\$177M / €163M), Japan (\$135M / €124M) and Australia (\$125M / €115M), according to the official data.

Other top export regions were the EU, South Korea, Colombia, the Philippines and Costa Rica.



### This is what Thai owners think about their pets

Research conducted by Thailand's College of Management Mahidol University (CMMU) on 1,046 pet parents concluded that 34% of them believe that having a pet is a social prestige. Almost 2 out of 10 respondents say that pets are stress relievers. And nearly half of the pet parents consider their animals to be proxy children.

Dogs are the most popular and preferred pets (40.4%), followed by cats (37.1%) and exotic animals (22.6%).



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### Natural Balance and Canidae to merge

Pet food manufacturers Natural Balance and Canidae announced that they are merging their businesses to create a specialty pet food enterprise. With “complementary yet differentiated offerings”, the new entity will include Canidae’s Pure, Goodness and All Life Stages plus Natural Balance’s Limited Ingredient and Original Ultra product lines. Transaction terms were not disclosed.



### i-Tail invests \$2.5 / €2.3 million to expand business in China and Europe

The i-Tail subsidiary of tuna multinational Thai Union sees a growing opportunity for its products in China, the UK, Germany, France and the Netherlands. It has set up subsidiaries in Shanghai, China, and Utrecht, the Netherlands, to oversee the import, sales and distribution of pet food and products in China and Europe.

A few months ago, i-Tail raised \$588 million (€541M) after going public on the Thailand Stock Exchange.



### European pet entrepreneurs make the Forbes 30 Under 30 list

The founders of 3 natural pet treats and supplement brands (Mammaly, NutriPaw and Just Russel) have been recognized as promising retail and e-commerce leaders.

NutriPaw is a labor of love by Connor Westby and Adelina Cornelia Zotta and specializes in natural herbal supplements. According to Forbes, the UK-based duo made \$6.7 million (€6.2M) in 2022 and had a customer base of more than 125,000 people.

Belgian animal lovers Louis Mortreu, Renaat Waeles, Cyriel Van Steen and Victor Mortreu set up Just Russel in 2020. They manufacture natural treats, supplements, chews, toys and customized dog and cat food, and offer a subscription-based delivery service.

Berlin-based Alexander Thelen and Stanislav Nazarenus started a functional snacks and products business, Mammaly, in 2020 with the help of veterinarians. The company has 50 employees and recently ranked 75<sup>th</sup> among the fastest-growing start-ups in 2022, out of more than 12,000 German companies.

### Petco increased revenue by 4% in 2022 but profit plunged by almost half

The American pet retailer Petco increased consumables sales by 13% last year. Its total revenue was \$6.04 billion (€5.55B) for its 2022 fiscal year, up 3.9% compared to 2021.

The company said it earned more than \$1 billion (€919M) in recurring purchases from customers participating in its frequent revenue programs. The retailer also acquired a million new customers, taking the total tally to 25.1 million. But at the same time, it invested \$278 million (€256M) in pet care centers, including vet buildouts and cooling infrastructure to support its fresh frozen expansion.





# Food and ingredients

Which human food trends have been transferring into the pet food world? And what does human-grade pet food actually mean? You'll discover the latest challenges in the dry pet food market, an analysis of investments in the fresh dog food category, and much more.

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# Current challenges for the dry pet food market



**Dry pet food is performing well, despite the impact of price hikes in this category. What are today's trends in consumer preferences? And how are these likely to develop in the coming years?**

Inflation has squeezed both manufacturers and consumers over the past year, but dry pet food sales continue to grow – in value at least. "Dry pet food remains a popular choice for consumers in many countries, thanks to the convenience factor," says Sneha Varghese, an Analyst for Future Market Insights (FMI). And while consumers are increasingly interested in fresh, natural alternatives for their pets, dry pet food may still have some advantages in other growing categories, including customized pet foods, and for purchasing online.

## How inflation is affecting sales

The sales value of dry pet food in the US grew by nearly 20% in 2022, according to NielsenIQ, but the majority of that growth was a result of price inflation. Actual unit sales began to decline in the latter months of the year. Although inflation has had an effect on nearly all consumer products, dry pet food has experienced some of the greatest impacts.

Inflation rates are expected to be the ultimate driver for dry pet food's performance in 2023 too. NielsenIQ: "If we see inflation slow down compared to last year, we expect sales value growth in the US to slow as well, and the impact to units to lessen."

## Different company approaches

The degree to which inflation affects specific manufacturers has varied from one company to the next.

According to the American Feed Industry Association (AFIA), some companies have been able to adapt to the fluctuating availability and cost of ingredients. But others have either adjusted their pricing or modified their product offering or packaging in response to rising ingredient costs.

AFIA's Director of Regulatory Affairs Louise Calderwood points out how this is working in practice. "We expect that our pet food manufacturers will continue to experience intermittent challenges in fulfilling orders as they navigate the changes. But many are taking proactive steps to head off these issues by carefully managing their inventory of ingredients and packaging," she says.

## Regional variation in trends

Pet ownership rates worldwide continue to grow, and global sales of dry pet food are expected to continue to rise by 5.1% per year up to 2027, according to Mordor Intelligence. Growth at that rate would put the industry

on track for the best-case COVID-19 recovery scenario envisioned by the Institute for Feed Education and Research (IFEEDER).

Global trends do vary from one region to the next. Some Asian countries still maintain a preference for raw pet food, while consumers in the US are increasingly looking for grain-free and natural products. Europeans, on the other hand, are more focused on sustainability and locally sourced ingredients.

“In some countries, consumers may be more price-sensitive and opt for lower-priced dry pet food options,” Sneha Varghese says. “While in other countries, there may be a greater demand for premium and high-quality products.”

### Natural and grain-free... or grain-in?

In higher-income countries, and especially in the US, demand for more ‘natural’ pet food products has had a significant impact on the dry pet food industry. Varghese: “Pet owners are increasingly concerned about the ingredients in their pet’s food, and want to feed them products that are free from artificial preservatives, colors and flavors.”

Consumer demand for more natural and high-quality ingredients has led to a shift in the types of ingredients used in dry pet food products. FMI noted an increase in fruits and vegetables, and a decrease in the use of fillers, by-products and artificial additives.

NielsenIQ research conducted in the US, concludes that grain-free diets have become popular, and brands have also experimented with more diverse protein options, such as fish and game. In 2022, sales of grain-free dry dog food reached \$1.4 billion (€1.3B), which is up 4.5% on the previous year. “This number is still down from what we saw in 2019 and the growth rate appears to be slowing. Meanwhile, what is known as grain-in dry dog food grew by more than 20% in both retail and online channels during the same period. This seems to show that more consumers are returning to grain-in pet food,” says NielsenIQ.

### New kinds of ingredients

Pet food manufacturers have expressed an interest in bringing even more ingredients onto the market, so

## *Dry pet food manufacturers have turned to innovation to draw in customers looking for more ‘natural’ alternatives.*

that they can offer increasing numbers of products with wellness claims. AFIA is currently lobbying for the US Food and Drug Administration (FDA) to update its animal food regulations, in order to allow the industry to expand both the ingredients it uses and the claims it can market.

Dry pet food manufacturers have also turned to innovation as a means to draw in customers who might be looking for more ‘natural’ pet food alternatives. NielsenIQ reports that new preparation methods such as freeze-drying and dehydration have seen strong growth.

Some insiders note that this trend toward more natural ingredients has the potential to further raise pet food prices, which could in turn reduce purchases by price-sensitive consumers.

### Dry food growth online too

The pandemic spurred an increase in online pet food sales in the US, and today close to 4 out of 10 products are purchased through e-commerce players. Online sales are expected to continue to grow by 2.7% annually – a pace that exceeds the projected growth for in-store sales, according to NielsenIQ. “While in-store sales are still where most of the revenue is in the US, online sales are growing at a faster pace across wet and dry food plus treats,” says the market research company.

Retail stores such as supermarkets, pet stores and big-box retailers remain the primary place where US consumers buy dry pet food. But online platforms such as Amazon and Chewy are gaining ground, and many manufacturers have begun to sell their products online to reach consumers directly. ♦



**Emma Penrod**  
PETS International Contributor

# Adopting a common approach to human-grade pet food



**Until now, very few pet food marketed as *human grade* could be considered as such. This is about to change.**

In recent years, the pet food industry has struggled with the definition and use of the term *human grade* for pet food and specialty pet diets. While the term could be broadly applied to products, it has been a complex process for both pet owners and manufacturers to understand and navigate.

## Human grade – or just edible?

A product formulated for a human diet is unlikely to be nutritionally adequate for a pet and not necessarily appropriate for animal consumption. A product might claim to be human grade because its ingredients 'came from a United States Department of Agriculture (USDA) meat-packing plant', but those ingredients alone are not enough to substantiate this claim.

Edible is a standard; human grade is not. Pet owners need to understand that not everything they and their families can eat, is safe for their pets. For example, chocolate, macadamia nuts and onions, to name a few, are edible and healthful for humans but can be toxic to cats and dogs – so human grade does not automatically equal nutritional safety for pets.

The USDA defines products fit for human consumption to be 'edible'. Such foodstuffs have been processed and inspected, and they have passed manufacturing process control regulations designed to assure safety for consumption by humans.

## New standard

Recently, the Association of American Feed Control Officials (AAFCO) has developed a standard for making human-grade claims on pet food. It states that every ingredient and the resulting product must be stored, handled, processed and transported in a manner that is consistent and compliant with 21 Code of Federal Regulations (CFR) part 117 and all other applicable federal human food laws as required by ingredient, process and/or facility type.

If those conditions are met for a pet food, human-grade claims may be made. If the conditions are not met, the claim is unqualified and the product is misbranded – a violation subject to enforcement action on the responsible party. The presence of 'human grade' on a pet food label implies a product or its ingredients meet the legally recognized *edible* standard.

However, whether a product is advertised as human grade does not determine a product's *safety*; all pet food products must also meet established animal feed safety requirements, including being unadulterated.

## The official definition

AAFCO recently approved its new standard for human-grade pet and specialty pet food products. The *AAFCO Guidelines for 'Human Grade' Claims*, along with the new standard, outline how all human-grade pet food

***Human grade does not automatically equal nutritional safety for pets.***

products should be manufactured in accordance with the acceptable regulations for ready-to-eat human food.

Pet food and specialty pet food manufacturers who intend to use the human-grade claim should adhere to the processing, packaging and labeling expectations stated in the standard, which specifies:

- Every ingredient and the resulting product must be in compliance with 21 CFR part 117 and all other applicable federal human food laws as required by ingredient, process and/or facility type.
- Manufacturers must be registered as both US Food and Drug Administration (FDA) human food and FDA animal food facilities, with appropriate documentation.
- Processing and/or packing of the final product identified within the Hazard Analysis and Critical Control Point (HACCP)/Food Safety Plan should occur in a space dedicated to producing an edible, ready-to-eat food.
- There should be clear labeling for the intended use as animal food, such as 'dog food' or 'cat treats'.
- The term human grade should appear in labels and product specifications.

Manufacturers are also encouraged to participate in the optional USDA Agricultural Marketing Services (AMS) Process Verified Program (PVP). The PVP is a verification service conducted by the USDA AMS to ensure that manufacturers who use the human-grade claim meet all requirements. Approved companies may market themselves as USDA Process Verified and include the USDA PVP shield on all packaging, labeling and promotional materials.

With these guidelines in place, pet owners can now buy what they feel is best for their pet with reassurance that human-grade claims are truthful and not misleading. ♦



**Austin Therrell**  
Executive Director AAFCO  
Association of American Feed Control Officials



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# The human food/pet food crossover



## As people align their furry friends' needs with their own, the pet food industry is seeing an influx of human food trends.

The growing humanization of pets is one aspect shaping the evolving pet food market, which is set to expand by 11.11% annually to reach \$224.5 billion (€210.9B) in 2027. Which human food trends have been transferring into the pet food world? While sustainability, organic, clean-label ingredients and veganism are broader areas of interest, there are a lot of other fascinating crossovers to explore within this space.

### Superfoods

With the increased importance placed on pets' digestive and holistic health, ingredients that especially cater to these needs are continuing to grow in popularity. Nutritionally dense, good-for-you 'superfoods' are being hailed across the category. In addition to common fruit and vegetable examples like beetroot, squash, spinach and berries, Mark

Hirschel, co-founder of plant-based pet care brand Hownd, highlights chia, hemp and flax seeds. These seeds have numerous benefits for pets, including fiber content, improved digestion, enhanced brain functioning and a better immune system. They also contain a higher amount of certain omega-3 acids than seafood.

"Superfoods are found in some pet food formulas for the same reasons they're used in human foods," explains Dr. Chyrle Bonk, a vet based in Idaho, US. "They provide some similar benefits to pets as they do to humans, and most are considered safe in the proper amounts." Products like Hownd's hemp & moringa kibble and papaya, chia & lentil dal signal the popularity of this trend. Meanwhile, US start-up Neo Bites combines insect protein with flax seeds in its functional dog food topping. [▶ SEE NEXT PAGE](#)

## Functional ingredients

Allied Market Research forecasts that the functional pet food market will grow by 8.8% each year to reach \$4.68 billion (€4.40B) in 2030. While mushrooms – which are the focal ingredient in pet supplements from Pawse and FreshCap, for instance – have long been a dominant part of the conversation, other ingredients are now also moving into the spotlight.

For example, Canadian manufacturer Orijen's Guardian 8 cat food formulation features elements like taurine (an amino acid that supports heart health), prebiotics like chicory root and fiber (boosting digestion), and omega-3 fatty acids (which promote healthy skin, shiny coat and joint strength). Similarly, the Skin Health and Allergy Support Chews for Dogs by US hemp brand Charlotte's Web boast functional ingredients like biotin, nettle leaf, burdock root and marshmallow root. Formulations that incorporate such ingredients – including those derived from the Ayurveda alternative medicine system – are clearly set to thrive.

## Novel proteins

With plant-based pet food on the rise, novel protein sources have been a key focus when taking inspiration from human food trends. According to Future Market Insights, the global pea protein market is expected to grow at a yearly rate of 11.8% until 2032. Similarly, Mordor Intelligence predicts that the hemp protein sector will expand by 3.9% annually between now and 2026.

The interest in novel proteins is visible in multiple pet food formulations. Apart from Hownd's hemp-based offering, products from UK brands Omni, The Pack and Butternut Box all feature pea protein in varying proportions. Another burgeoning trend in this space sees plant proteins being blended with animal ones to offer a new source of nutrition to pets. For example, Butternut Box's meatless Ready Steady Veggie meal for dogs combines formulated eggs with potato and pea protein.

## Insects

It seems that manufacturers have identified insects as offering a big opportunity. Like Neo Bites' dog food topping, many companies are offering insect-plant

protein blends to obtain a slice of the pie. German manufacturer Green Petfood produces 2 varieties of dog food comprising insect and potato protein, and another that blends chicken, insect and potato protein. Similarly, UK brand Yora's Dreamers dog treats pair insect meal with chickpea flour. Meanwhile, in the cat food realm, Dutch start-up Lovebug's kibble combines insect meal with cereal and soy protein.

The popularity of insects in pets' diets could also be mirrored in human diets, especially since the European Union approved the sale of certain protein-rich insects for human consumption in January. This marks another interesting intersection between food for humans and pets.

## Cell-based meat

The cell-based meat industry has been unstoppable since its regulatory approval for sale in Singapore in 2020. In fact, the market could be worth \$25 billion (€23.5B) globally by 2030, according to McKinsey. So far, London start-up Good Dog Food is the world's only company developing cell-cultured meat specifically for pets.

## Realistic-looking foods

There has been similarly rapid growth in 3D-printed and precision-fermented meat (which are both plant-based). Made in labs, these iterations bear a striking resemblance to conventional protein, catering to meat-eaters, flexitarians and vegans alike. Reflecting this flourishing interest in realistic-looking meat, Dr. Bonk has noticed a shift in pet food products that look more like human food. Hirschel agrees that foods emulating the appearance of meat is a major trend crossing over from human to pet food, with products such as 'chicken and beef strips' and 'air-dried meaty and fishy-looking snacks'.

In the UK 2 examples can be found: both Rosewood's chicken and cheese dog treats and Great&Small's vegetable treats are shaped and colored to mimic bacon. Nestlé-owned Lily's Kitchen, meanwhile, makes various dog treats that look like the meat humans consume – such as its crackling pork & apple and duck & venison sausages, as well as its mini beef burgers.

*Nutritionally dense, good-for-you 'superfoods' are being hailed across the category.*

Commenting on this marketing trend, Dr. Bonk says: "The packaging has also changed to be more like human foods with clear windows to see the food. There's nothing wrong with making a more visually appealing food as far as humans are concerned. But our pets don't really care what their food looks like."

### Perishable and refrigerated foods

"Shaping and coloring pet food can lead to additional processing," she adds. This is at odds with preservative-free, clean-label eating, which has been a priority for many consumers since the start of the pandemic. In fact, the global clean-label ingredients market is set to grow by 17.6% annually by 2030.

"Pet food [brands] are also focusing more on simple ingredients, to a point," says Dr. Bonk, referring to the fact that most pet food recipes will include simple proteins and carbohydrates with limited other ingredients. However, she adds: "Unlike most [human] food, pet food needs to be more shelf-stable, which requires the use of preservatives. This can go against what people consider simplifying."

In the context of avoiding preservatives in pet food and offering a less-processed product, Dr. Bonk, therefore, believes brands will produce more and more perishable or refrigerated pet foods in the future. The biggest proponent of this is US giant Freshpet, whose range of fresh dog and cat food needs to be refrigerated. The company claims its "all-natural" offerings improve digestion, energy and weight management, and maintain shinier, softer skin and coats.

So, as the humanization of pets continues, we're likely to see more human trends transferring over to the pet world – and vice versa. ♦



**Anay Mridul**  
PETS International Contributor



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The range includes 7 dry food varieties for different life phases and sizes as well as 6 wet food varieties in tins for all breeds.

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# How algae-based omega-3s can advance sustainability and pet nutrition

While pet brands tap into the health and wellness trend, re-evaluating the functional benefits their products offer, they must also consider the environmental impact of each ingredient.

Companies often turn to omega-3s to meet consumer demand for ingredients that support their pet's health. Regular consumption of EPA and DHA omega-3 fatty acids promotes wellness during every stage of life, benefiting a pet's cognitive function and cardiovascular, brain, eye and joint health.

## The challenge

Traditionally, pet food manufacturers have included fish oil or vegetable oils to increase omega-3 levels in their products. But not all omega-3 sources are created equal. Vegetable oils like flaxseed are rich in ALA, which must be converted to EPA and then DHA for pets to reap the benefits. The conversion process is not efficient, with the majority of unconverted ALA used or stored as energy.

Fish oil, on the other hand, was believed to be the most efficient and DHA-rich source, but is a limited natural resource. Nearly 90% of the world's marine fish stocks are fully exploited, overexploited or depleted, leaving companies struggling to find alternatives that support their nutritional and sustainability needs.

## The solution

The solution is algae-based omega 3. These long-chain omega-3 fatty acids are derived from algae, one of the world's most abundant and productive microorganisms and the original source of omega-3s. Sourcing DHA from algae-based ingredients reduces pressure on marine resources, while offering enhanced nutrition for pet food formulators and active nutrition on-pack claims for marketers.

Corbion, a global leader in algae-based ingredients, is meeting this growing demand for a more sustainable, efficient source of omega-3s through its AlgaPrime™ DHA.

## Twice the levels of omega 3

AlgaPrime DHA is a proven ingredient in aquaculture and animal feed, with approximately twice the levels of omega 3 as fish oil included in pet food. The ingredient is created by fermenting sugarcane into sustainable, high-quality omega 3, to help advance diets and reach sustainability goals.

## What the research shows

The company's Life Cycle Analysis (LCA) results confirmed that AlgaPrime DHA has a lower carbon footprint compared to traditional sources of fish oil, enabling pet food producers to meet key UN Sustainable Development Goals. The ingredient is already included in some of the industry's top pet food products, following a partnership between AlgaPrime DHA and IQI to expand nutrient-rich pet food in Europe and North America.

For pet food formulators and brands searching for a consistent, reliable and traceable source of omega 3, algae-based alternatives like AlgaPrime DHA are the sustainable solution. ♦



**Erica Franco**

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# The challenges and added benefits of natural food colorants

**While synthetic dyes are associated with various health concerns in both humans and animals, using natural pigments in pet food formulations has several advantages.**

In addition to helping achieve a desired color, natural pigments are bioactive molecules that can be used to improve the health of pets while extending the shelf life of pet food.

## Benefits of phytonutrients

Dogs are able to digest nutrients from animal- and plant-based foods. Yet, concerns with synthetic additives and vegetable 'fillers' in conventional diets are pushing pet owners to consider grain-free, ancestral, or biologically appropriate raw food (BARF) alternatives. Unfortunately, such diets are often incomplete and unbalanced, and they can lack phytonutrients if not monitored.

Phytonutrients are naturally occurring plant compounds that help provide nutrients, flavor and color. They can play a role in improving metabolic functions and preventing disease. To help avoid potential deficiencies in, for example, strictly protein and fat diets, they can be added to conventional wet and extruded diets to improve the nutrient profile.

## Natural food colorants

There are thousands of phytonutrients, each with its own unique set of health benefits – and pigment color. Some examples include:

*Lycopene* (pigment color: orange-red) functions primarily as an antioxidant. An in vivo study conducted at Aix-Marseille Université found that once ingested, lycopene supplementation prevented fatty liver disease after 12 weeks of feeding a high-fat diet.

*Chlorophyll* (pigment color: green-blue) provides the basis for photosynthesis in plants, algae and some

bacteria, making chlorophyll the most abundant natural pigment in the world. This group of pigments is often extracted from leafy greens like spinach, chlorella and spirulina. While most research has focused on the antioxidative and anti-inflammatory properties of chlorophyll, recent studies are finding novel ways to use this pigment.

*Quercetin* (pigment color: yellow) is one of the most studied antioxidants among the phytonutrient group of flavonoids. While its use in veterinary medicine is still in its infancy, manufacturers like Hill's Pet Nutrition have started including quercetin in their Derm Defense formulation based on its immunomodulatory effects on pets' response to allergens.

## The challenges of using natural pigments

The main challenge when using natural food coloring is preserving the stability of the pigment. While wet food formulas are less of a concern, most natural pigments are sensitive to the processing required to make dry kibble.

Because phytonutrients are not 'essential' nutrients, there is no established daily recommended intake for specific phytonutrients. To address this, future studies should focus on optimizing pigment stability, determining a therapeutic dose and noting potential side effects. ♦



**Ashkan Sadri**  
Veterinary researcher  
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# Figs: a promising fiber source for pet diets

Figs can provide health benefits and improve product quality. What's their potential as a source of functional fiber in pet food formulations?

According to both the Association of American Feed Control Officials (AAFCO) and the European Pet Food Industry Federation's (FEDIAF) nutritional requirements for complete and balanced diets for dogs and cats, fiber is not an essential nutrient because it does not provide direct nutritional value. However, dietary fiber shows a multitude of benefits, which include the mitigation or avoidance of many illnesses, improvements in gut and microbiome health, and an array of functions – from aiding product texture and processing to improving stool quality.

As we learn more about the role of dietary fiber, our search for functional fibers to include in pet food formulations grows. The advantages of including functional fiber, in terms of both health and product and processing parameters, mean that fiber is now a key focus within the pet food industry.

## Benefits of insoluble fiber

Insoluble fiber travels through the digestive tract without being broken down. This contributes to gut motility by stimulating intestinal tract movement. Regular movement of digestive bulk through the gut is beneficial to gastrointestinal health. Insoluble fiber regulates stool consistency and quality, due to its bulking and water-retaining capacities.

## Nutritional value of figs

The common fig (*Ficus carica*) is an important crop worldwide, known to be one of the first cultivated edible fruits. Fig farming is reliant upon the utilization of

co-products to be efficient. Figs are easily spoiled, and without the production of co-products, there would be a huge waste of nutritional value.

Figs have high antioxidant potential and are low in fat while being rich in natural and simple sugars, minerals and fiber. They also contain an abundance of plant compounds such as flavonoids, polyphenols and phytosterols. Studies have reported beneficial effects of fig products on several disease states in humans, including cardiovascular, respiratory and inflammatory diseases. As a natural product, the nutritional analysis of figs varies depending on the conditions in which they were grown and harvested.

## Fiber content

Raw figs contain 2.9 g/100 g total dietary fiber. As a comparison, apples contain 1.7-2.5 g/100 g depending on the variety. Within dried figs, total dietary fiber increases to 9.8 g/100 g, consisting of 1.5 g soluble and 8.3 g insoluble fiber per 100 g; thus, insoluble fiber contributes 84.7% of the fiber content of dried figs. The insoluble fiber content of fig co-products is dependent upon the components included in the product, with fig powder produced from the peel having higher levels of fiber than that produced from the pulp.

## Properties of fig powder

The techno-functional properties of fig powder have been studied. The water-holding capacity of the powder is similar to that of cereals, at approximately 5 g water/g fiber. The oil-holding capacity of fig powder



**Fig pulp and fruit are safe and nutritious for cats and dogs to consume in moderation.**

was found to be 0.75-0.9 g/g fiber, which is lower than that reported for other fruit co-products. This relates to the chemical structure of the fruit and is relevant for applications such as flavor retention. The emulsification capacity and stability of fig powder were found to be low, due to its low protein content.

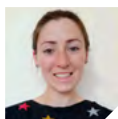
**Effects on digestion**

The application of fig paste as a treatment for constipation was studied in beagles in 2011. Fig paste was concluded to be safe, and its laxative activity was clearly demonstrated. Increased fecal weight and reduced colon transit time were seen with the use of fig paste, due to the water-binding capacity and bulking properties of cellulose.

**Application in pet food formulations**

Safety is of paramount importance with any ingredient we include in pet food formulations. The safety of figs for pets may be questioned, as the leaves of *Ficus carica* contain ficin, a substance toxic to dogs and cats. However, fig pulp and fruit are safe and nutritious for cats and dogs to consume in moderation.

Figs are available in a variety of formulations, including paste, diced, concentrate, nuggets and powder, to suit different purposes. In the human food industry, their co-products are often utilized within the baking, beverage and dairy industries. Fig co-products are used for numerous benefits, which include achieving particular product textures or sensory parameters, providing a source of antioxidants, contributing sweetening properties, and boosting the nutritional profile. Currently, fig co-products are not often utilized within the pet food industry, and studies on the use of fig products within pet foods are scarce. So, there is potential here for a new nutritious source of functional fiber within pet food products in the future. ♦



**Laura Ward**  
Pet Nutritionist  
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# Pulses in pet food: achieving a balance

The low price and high-protein properties of pulses make this ingredient very attractive, but there are some digestibility concerns to take into account.

Pulses – peas, lentils, chickpeas and beans – and their by-products have been used in pet food as raw materials of interest for over 2 decades. Their inclusion has increased in popularity alongside grain-free diets entering the pet food market. In grain-free formulations, pulses are used as sources of starch, protein and fiber to replace more conventional grains, namely rice and corn.

## Pulses as a protein source

Pulses are low in price, sustainable and vegetable-based, making them an appealing source of protein for vegetarian, vegan or hypoallergenic diets. Nevertheless, the amino acid profile is far from perfect, characterized by high lysine and low methionine content. However, combined with animal-derived protein or free amino acids in an appropriate ratio, one can easily achieve a balanced amino acid profile.

The ratio of inclusion may be an important factor. Research published in *Animal Feed Science and Technology* in 2003 showed that more than 15% inclusion of soybean meal – which shares many similarities with pulses – can negatively influence protein digestibility and lead to lower availability of essential amino acids. One of the essential amino acids of concern is methionine, which enables several metabolic pathways and taurine synthesis in dogs.

In dogs, taurine is a non-essential amino acid synthesized from methionine and cysteine, both sulfur-containing amino acids.

It is important to note that taurine is not incorporated into proteins; rather, it is used as a mediator for biological processes. Its activity is the highest in the heart, where taurine represents approximately 60% of the total amino acid pool.

## Links with heart disease and taurine deficiency?

The complex relationship between pulses in pet food and nutritional dilated cardiomyopathy (DCM) in dogs has been critically discussed for a decade, proposing different causation links. Researchers evaluated the effects of grain-based and grain-free dog foods on taurine status in a 2020 study, and their findings implied that diets high in soluble fibers could increase susceptibility to taurine deficiency, affecting the reabsorption pathway of dietary taurine.

Nevertheless, current research is still inconclusive. It is advised that pet food manufacturers adhere to known safe inclusion rates of pulses in pet food and conduct digestibility trials to ensure formulations are performing to the standard on paper as well as in real life.

▶ [SEE NEXT PAGE](#)

Pulses are an interesting vegetable-based protein source for dogs consuming plant-based diets. Nonetheless, the increased risk of taurine deficiency must be noted because taurine is absent in plants other than algae, and vegan diets provide marginal levels of sulfur-containing amino acids. Additionally, the high fiber content of plant ingredients may increase taurine loss. Therefore, it is crucial that vegan diets formulated for dogs contain sufficient quantities of methionine and cysteine to support their metabolic pathways as well as taurine synthesis. A review in 2018 on the nutritional adequacy of plant-based diets for pets concluded that the addition of methionine and taurine should be considered to ensure adequate dietary intake of sulfur-containing amino acids.

### Influence of pulse fiber on health

Fiber derived from pulses mainly consists of resistant starch and legume oligosaccharides, a type of carbohydrate. Fermentable fiber is known to positively influence postprandial glucose and insulin responses, affecting stomach emptying and gastrointestinal transit time, making pulses a potential option for diabetes and weight loss formulations.

Pulse fibers serve as prebiotics and exhibit several health benefits such as anti-inflammatory properties. Nevertheless, oligosaccharides can lead to a higher degree of fermentation in the large intestine, resulting in higher production of gases and short-chain fatty acids – like butyrate – by microorganisms. Fermentation and higher butyrate production benefit gut integrity and the microbiome. Nonetheless, too high of a fermentation rate would lead to negative consequences: increased fecal bulk due to higher water-binding capacity and increased flatulence. Therefore, higher pulse inclusion in pet diets is undesirable and should be avoided.

### Antinutritional factors

Pulses are also known for their antinutritional factors: trypsin proteinase inhibitors, phytic acid, lectins and saponins. Antinutritional factors in pulses serve as a defense mechanism against animals and insects and as agents for plant-to-plant competition. When ingested by a pet, antinutritional factors negatively affect nutrient digestibility and absorption, palatability and food intake. They can bind to nutrients (vitamins and

trace elements), making them indigestible, or directly inhibit enzymatic digestion.

Luckily, most of these compounds are sensitive to heat and can be substantially reduced by dehulling, fermentation and heat processing. Recent reviews have shown that the activities of trypsin inhibitors decreased by up to 95% by extrusion. Nonetheless, extrusion had lower success in the reduction of phytate levels (7% to 26%) and varied by legume and extrusion conditions.

As antinutritional factors may significantly influence pet health, authors conclude that pet foods with higher levels of plant-based ingredients may also require optimization of processing methods to maximize their nutritional density and nutrient bioavailability. The distribution of these antinutritional factors in different components of pulses is highly variable. Interestingly, recent research showed that some of these compounds (such as tannins) demonstrated several health benefits such as antimicrobial and antioxidative properties.

### Inclusion of pulses in pet food formulations

Pulses may be an interesting source of nutrients when used to complement the other raw materials in pet food formulations. Nonetheless, an article published in the *Journal of Animal Science* in 2019 suggests that there is a high likelihood that legume seed use may be greater than 40% in some current formulas on the market. This inclusion exceeds the concentration previously investigated in dogs and can exhibit potentially undesirable effects.

Thus, the formulation of complete and balanced pet food diets that implement higher concentrations of pulses requires an understanding of nutrient interactions and the effects of processing that can negatively affect nutrient metabolism or digestibility. Moreover, it is advised that for diets containing high levels of legume oligosaccharides, amino acids such as taurine, methionine and cysteine should be fortified. ◆



**Dr. Diana Brozić**  
Assistant professor at the University  
of Zagreb, Croatia

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# Pet food with love from the heart of Europe

**Vafo, a leading European producer of super premium pet foods, and a sustainability pioneer in the pet care industry is bringing dozens of new products to this year's Zoomark.**

Visitors to one of the pet sector's most prestigious events will have an opportunity to see the sustainable products in the Brit Care line, which uses alternative sources of protein and fully recyclable packaging. And the Christopherus line will be introducing the very first vegetarian food in the Vafo portfolio.

## Sustainability

For pet owners, an increasingly important aspect of the products they buy is sustainability. This is something that Vafo has been focusing on for several years. So the company will present its entire new line of Brit Care foods with innovative recipes. Special attention is now paid to the choice of ingredients, the vast majority of which come from local producers, with insects playing an important role as a sustainable source of protein. Insect farming is far friendlier to the environment than conventional livestock farming, and it doesn't burden the planet with greenhouse gases.

New Brit Care products have innovative packaging made from recyclable materials that can be sorted together with other plastics, like PET bottles. The improved recipe is fortified with vitamins for even more emphasis on pet health. This sustainable Brit Care formula is an excellent addition to other super-sustainable products in the Vafo portfolio, such as Hau-Hau Champion and Planet Pet Society, made using second-chance ingredients.

## Vegetarian dog food

For the first time in the history of Vafo, vegetarian dog food is taking its place in the product portfolio. Under the traditional Christopherus brand, pet owners will be able to feed their four-legged friends food that's substantially friendlier to the environment yet still healthy and nutritious.

New items are also being added to the highly popular Carnilove True Fresh product line, which contains fresh meat and is the clear choice for owners who want to give

their pets the most natural, evolution-tested ingredients.

## Promoting its strategy

Vafo is pursuing sustainability not only with its new products but also, in keeping with its sustainability strategy, during its trade fair participation. This means you won't find any printed promotional materials or visiting cards at its Zoomark booth. And as well as taking a look at the new products, booth visitors can enjoy delicious refreshments with a friendly vibe.

Visitors at Zoomark International 2023 will find all this and much more in the Vafo booth. ♦

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# Cell-based toppers in pet food: an overview

**With concerns regarding sustainability and animal welfare in intensive farming practices, lab-grown meat may have potential as a viable meat alternative.**

While plant-based protein sources have made significant progress in providing alternatives to conventional meats, analysis of numerous vegan pet diets has revealed deficiencies in micronutrients required under European Pet Food Industry Federation (FEDIAF) and Association of American Feed Control Officials (AAFCO) requirements. This provides an opportunity for the pet food industry to explore 'cultured meat' grown in a laboratory as a sustainable and scalable alternative compared to current farming practices.

## The process

Agriculture is changing, and it is becoming cellular. The intensive farming practices introduced in the 1930s have transformed the meat industry into what it is today, but with limited advancements. Unfortunately, these outdated methods consume excessive resources and put the welfare of farm animals at risk.

Around 50 startups in the US and the EU have begun developing cultured meats, by building upon existing techniques used in regenerative human medicine. While the basic principles remain the same, advances are needed to achieve scalability.

There are 3 basic principles for this process:

### 1. Obtain a cell sample

A small sample of stem cells (that can be sourced from fat or muscle tissue) is needed to begin the culturing process in vitro. This is done with the help of a veterinarian to anesthetize an animal and take a biopsy. The main objective is to recreate complex muscle tissue with only a few cells.

### 2. Grow cells in a bioreactor

Conventional tissue culture techniques grow cells in a flask with nutrients, hormones and growth factors necessary for cell proliferation and differentiation into mature muscle. However, this tedious process is not efficiently scalable, so cultured meat is often grown in bioreactors. This sounds intimidating, but a bioreactor is just a large vessel that allows us to introduce parameters, such as gas exchange and heat transfer, and limit shear stress to grow a colony of muscle cells. Various bioreactors are currently used in meat culturing, each with its own advantages and caveats. Air-lift reactors are an interesting option that could be used to increase cultured meat production and provide a viable alternative to intensive farming. [▶ SEE NEXT PAGE](#)

This method puts the muscle cells in suspension and allows the contents to circulate and grow without any moving parts. A 2020 study published in *Chemical Engineering Science* estimated that a single 300,000L air-lift reactor could produce  $2 \times 10^8$  cells/mL – capable of feeding 75,000 people annually.

### 3. Transfer cells to a scaffold

Muscle cells are characteristically adherent, meaning they need to adhere to a substrate to survive. Otherwise, they may undergo a form of programmed cell death referred to as *anoikis*. To avoid this, the cultured cells are introduced into a 3D scaffold material consisting of extracellular matrix proteins like collagen, glycoproteins and glycopeptides that resemble the natural composition of tissue within living animals. These scaffolds are typically in the form of a hydrogel that allows muscle cells to contract and align into muscle fibers.

The finished product is a colony of muscle cells resembling minced meat. It can be incorporated into pet food formulations or served as a meal topper. However, R&D has many obstacles to overcome before it can reproduce complete muscle tissues composed of the filamentous networks and various cell types that consumers are familiar with.

### Nutritional deficiencies?

Meat is considered nutritious because of its highly digestible proteins, essential amino acids, vitamins and minerals. For cultured meat to be comparable, it needs to have a similar nutrient profile. To date, a comprehensive nutrient profile of cultured meat has not been released publicly.

The primary deficiencies are likely essential fats, vitamins and minerals that stem from attempting to replicate a living organism in a laboratory environment. While amino acids and essential fats can be added to the growth medium as the cells are cultured, it is unclear how much is successfully absorbed into the cell and available during digestion. This is also the case with vitamin B12, an essential vitamin synthesized by the gut microbiome that requires a binding protein (*transcobalamin II*) to cross the cell membrane. Without a living animal, vitamin B12 cannot be produced naturally or transported into the muscle tissue.

### ***Further development could make cultured meat a viable replacement in the foreseeable future.***

In addition, cultured meat has a pale appearance compared to animal meat because it lacks myoglobin, a heme protein that binds iron and provides oxygen to the muscles. As a result, cultured meat should also be supplemented with an iron complex that is easily absorbable during digestion.

These deficiencies mean that current applications for cultured meat are limited to use as a meal topper rather than as a replacement for meat. However, further development could make cultured meat a viable replacement in the foreseeable future.

### Sustainability and regulations

Nearly 30% of meat produced by intensive farming in the US and Europe is used in pet food production. While cultured meat requires fewer agricultural resources and less land than traditional livestock, it currently has a higher energy consumption. This is due to the need for steam sterilization, the production of the growth medium and the bioreactor design. As optimization progresses, energy consumption is expected to decrease significantly.

Further, approval by regulatory bodies must also be considered, as the only country to approve the use of cultured meats thus far is Singapore. Like living animals, the production of cultured meat requires the use of hormones and growth factors in the culture medium to sustain cell proliferation and differentiation. However, this presents a challenge because hormone growth promoters are banned in conventional meat production in the EU. Therefore, efficiently increasing the production of these compounds, and ensuring they do not have adverse effects on short- and long-term health, are essential issues that must be addressed. ♦



**Ashkan Sadri**  
Veterinary researcher  
Vetabroad.org



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# Food handling practices of dog owners

New research dives into the food hygiene habits of dog owners – are they following the best practices?

As part of the Clinical Nutrition team at North Carolina State University (NCSU) College of Veterinary Medicine, our studies typically examine *what* we feed our pets. During water cooler talk, *how* we fed our own pets, including dog bowl hygiene, became a topic of conversation. Once we realized the range of habits among professionals, we wanted to dig deeper into the best practices, the reality of dog-feeding habits and how discrepancies may impact our patients and their owners. So, we conducted a study to investigate.

## Study design

Participants were divided into 3 groups:

- Group A was given guidelines from the US Food and Drug Administration (FDA) regarding pet food handling
- Group B was given the same guidelines along with specific instructions extrapolated from the FDA Food Code for humans
- Group C was given no guidelines at all.

Our study was composed of 2 parts. The first part was a survey for dog owners regarding their dog and pet

food-handling habits. The second part involved an assessment of bacterial contamination of dog bowls before and after the institution of hygiene protocols.

## Survey findings

A total of 417 surveys were returned. Less than 5% of respondents were aware of the FDA pet food handling guidelines. However, when asked where they expected to find this information, 8% replied the FDA, 41% the food label, 28% their veterinarian, 11% the store of purchase, 6% the United States Department of Agriculture (USDA) and 6% various websites.

The majority (over 75%) reported compliance regarding inspecting the packaging for visible damage, avoiding using the food bowl as a scooping utensil, tightly covering leftover pet food, discarding food safely and avoiding raw food.

The minority (under 25%) reported compliance regarding washing hands prior to handling pet food, washing the food dish after each use, and washing the food scoop after each use.

[▶ SEE NEXT PAGE](#)

Washing the dog bowl weekly was most commonly reported (22%), whereas 18% of respondents reported that they washed their dish less than every 3 months – or not at all.

The majority of respondents (65%) removed dry dog food from the manufacturer's bag for storage. Roughly two-thirds of respondents reported preparing their pet's food on a surface used for human food preparation or in the same room.

### Analysis of bacterial contamination

The bowls of 68 dogs were swabbed 8 days following protocol initiation on average. Instituting a hygiene protocol made a difference: Groups A and B both had significant decreases in bacterial contamination, while Group C had a small increase (although not significant). Washing the bowl according to FDA recommendations (hot water or dishwasher) proved to be more effective than washing using cold or lukewarm water.

The analysis found no significant difference in hygiene between Groups A and B. Bowl material and drying method did not show a significant difference. Additionally, the initial contamination level did not differ based on the presence of immunocompromised individuals or children in the household.

### Poor compliance and associated risks

Unsurprisingly, most dog owners were not aware of, and did not follow FDA pet food handling and storage guidelines. Hygiene-related handling practices, such as washing hands or the bowl, showed low levels of compliance.

Although this study did not differentiate between pathogenic and non-pathogenic bacteria, the implication of poor hygiene practices should be considered. There have been outbreaks of both human and pet illnesses secondary to dog food, and the Centers for Disease Control and Prevention (CDC) has suggested pet food handling, including cross-contamination in the kitchen and irregular cleaning of dog food dishes, as a factor in previous outbreaks.

Examining the effects of a fresh or raw diet, or any diet that involves increased preparation in the kitchen,

is warranted, as previous studies have found that raw food is more likely to have bacterial contamination.

However, the risks can be mitigated. Both hygiene protocols yielded a significant reduction in bacterial colony counts in our study. These counts are commonly used in the food industry; for example, the CDC's sanitization guidelines for human dishes are based on achieving a 5-log reduction in bacterial counts.

Nevertheless, only 20% of Group A and B respondents reported that they were likely to follow their hygiene instructions long-term, and only 8% said they were likely to follow all instructions. Since the protocols had multiple steps, it is difficult to say which were the most effective. Recommendations are needed that are both feasible and effective. Future studies should address potential concerns such as the effects of biofilms, the influence of bowl degradation on contamination and the risk of cross-contamination in households. This is particularly true for pathogenic bacteria with high zoonotic potential.

### Future directions

The majority of respondents reported storing their pet food against FDA and manufacturer recommendations, which may have implications as far as increased risk of microbial contamination, nutritional degradation and palatability. Therefore, it is recommended that manufacturers study food stability under household conditions.

Additionally, the expected sources of pet food handling information, including the pet food label, veterinarians and pet food retailers, should consider featuring these public health recommendations for their clients and/or customers. However, it was noted that Group C showed no significant difference despite this information. This suggests that education beyond awareness is needed to allow for effective changes to be made. ♦



**Emily Luisana**  
DVM, DACVIM (Nutrition)  
North Carolina State University (NCSU)

# Enhancing pet nutrition sustainably



With science-based solutions that enable adoption and a unique sustainability set-up, Corbion® is improving pet nutrition with the AlgaPrime™ omega-3 DHA solutions.

7 years ago, Corbion Algae Ingredients was established in the belief that nutrition is the pivotal element to promoting health and food. The company went on to unleash the power of algae fermentation to preserve the planet's limited resources. This is a sustainable and feasible innovation based on industrial fermentation, transforming microalgae and sugarcane into rich ingredients for active nutrition.

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In 2020, the results of this were confirmed, when Corbion completed a full Life Cycle Assessment (LCA) demonstrating that omega-3s from AlgaPrime DHA have a lower carbon footprint than traditional fish oil sources.

Omega-3s from AlgaPrime DHA Liquid Suspension have about 29-32% less impact on the climate compared to traditional sources of fish oil. The ISO 14040/44-compliant LCA was peer-reviewed and accepted for scientific publication in *Algal Research* on 15 September 2021.

## About Corbion

Corbion is a sustainable ingredients company dedicated to preserving what matters, and specializing in lactic acid, lactic acid derivatives, food preservation

solutions, functional blends and algae ingredients.

The company champions preservation in all its forms, from food and food production to health and the planet, using both application and product knowledge to propel nature's ingenuity through science. With more than a century of experience, Corbion continues to work side-by-side with its customers to make its cutting-edge technologies work for them too.

Leveraging advanced capabilities in fermentation and preservation technology, the company helps differentiated products in diverse markets that include food, home & personal care, animal nutrition and more. In 2022, Corbion generated annual sales of €1,457.9 million (\$1,585.9M) with a workforce of 2,601 FTE. ♦

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# Functional ingredients for immune health



Several ingredients can help support the immune system. By using them in pet food, manufacturers can not only differentiate themselves but also improve pets' health.

The immune system is designed to combat foreign invaders, including allergens and bacterial and viral pathogens, and its ability to distinguish foreign particles from normal body tissues is impressive. Nutrition plays an important role in maintaining the immune system. Immune health can be improved with gastroprotective, anti-inflammatory and antioxidative agents, so pet food brands may want to consider the inclusion of nutritionally active ingredients in their formulations.

## The immune response

Many types of immune cells are produced in the body's lymphoid tissues, and their ability to specialize helps them respond to the various invaders they may encounter. The immune response involves isolating the invader and neutralizing it with cytokines, a type of inflammatory mediator. During this process, free radicals are generated, causing damage to the surrounding tissues. Some nutritional components can reduce invasion, address invaders that get past initial defenses, and minimize associated tissue damage.

## Ingredients benefiting the gastrointestinal tract

Since the body actively takes in large amounts of foreign substances (i.e., food) through the mouth and into the gut, it is not surprising that 70% of lymphoid tissue is associated with the gastrointestinal tract. Gut-associated lymphoid tissue (GALT) trains the immune system to recognize potential invaders, with the lining of the intestinal tract acting as a physical barrier.

Dietary fibers such as beet pulp, citrus pomace, gum arabic and tomato pomace play an important role as substrates for bacterial fermentation in the gut. These bacteria secrete short-chain fatty acids, which feed the cells lining the intestine. Prebiotics such as fructooligosaccharides, galactooligosaccharides and inulin are not only fermentable, but they also help reduce the presence of pathogens by enabling the growth of beneficial bacteria. Probiotics and postbiotics such as yeast extract and tyndallized bacteria have also been shown to favorably impact gut immune function.

## Inflammation and the effects of omega-3 fatty acids

The immune system is intertwined with the inflammatory process. Invaders can cause inflammation, as does the immune response against the invaders due to the production of cytokines. Inflammation risk also increases with age, and it is associated with diseases such as osteoarthritis, obesity and diabetes.

Many pet diets incorporate omega-3 fatty acids such as docosahexaenoic acid (DHA) and eicosapentaenoic acid (EPA). Omega-3 fatty acids serve as precursors of less inflammatory lipid mediators (in contrast to those associated with omega-6 fatty acids), thus reducing inflammation. Sources of DHA and EPA include fish oils and algal oils. Some terrestrial plant oils such as flax, camelina and canola can produce an omega-3 fatty acid, alpha-linolenic acid (ALA), that can be converted into DHA and EPA in dogs. Given concerns regarding the sustainability of fish farming, algal oils have risen in popularity.



### Sources of dietary antioxidants

Inflammation causes cell destruction and, consequently, the release of free radicals. Free radicals pose a danger to other cells due to their ability to damage DNA and other cellular components. To counter this, the body actively produces its own antioxidants such as superoxide dismutase and glutathione peroxidase.

The body's antioxidant status can be further augmented by dietary sources of antioxidants. For example, vitamin E is an antioxidant added to pet food to meet nutritional requirements, and several studies have even shown added benefits from increasing the amount of vitamin E above the nutritional requirement. Also, because of its notoriety in humans, vitamin C (ascorbic acid) is often added to pet foods; however, there is limited efficacy data available on this vitamin in dogs and cats. Research into combatting COVID-19 has brought attention to the anti-viral effects of vitamins C and D.

Beta-carotene, astaxanthin and alpha-lipoic acid are additional antioxidants that have been shown to be effective in dogs and cats. Other antioxidant-rich ingredients include quercetin, Aronia berries (source of anthocyanins, quercetin, catechins and caffeic acid) and melon juice concentrate (source of superoxide dismutase), as well as other fruits and vegetables. Certain berries like cranberries contain antioxidative compounds that are believed to help in specific areas of the body such as the urinary tract. Antioxidant concentrates are often necessary to achieve efficacy.

### Applications to pet food formulations

In summary, immune health can be improved with the addition of protective agents (i.e., gut actives), the management of inflammation, immunomodulators and antioxidants. Given the range of ways to improve immune health, pet food brands can differentiate themselves by using a wide array of nutritionally active ingredients while improving pet health. ♦



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# Investment spike in the fresh dog food category

One of the fastest-growing segments of the European pet food category is grabbing the attention of investors. Why is fresh dog food such an attractive proposition?

With a natural pet food segment worth approximately €5 billion (\$5.33B), the opportunities around natural and minimally processed (that is, raw or gently cooked) foods are generating huge interest when it comes to capital injection. This is fueled by the fact that consumers are increasingly applying the same quality expectations to food for their pets as for themselves.

### Outgrowing the broader market

The European pet edibles (both food and treats) market is now worth approximately €30 billion (\$32B) and has been growing at a rate of 5% over the past 5 years. The natural segment is outgrowing the broader market with approximately 8% value compound annual growth rate (CAGR) over recent years. Whilst smaller in scale (approximately €1 billion/\$1.07B), the subcategory of raw and fresh pet food is experiencing the fastest growth with a yearly increase of around 10%.

Presently, around 90% of the minimally processed segment is focused on dog food. One of the reasons for this is that dogs are typically less fussy eaters than cats, so dog food has proven an easier market for challengers to disrupt.

### Premium products

Pet owners still appear to be prioritizing premium products for their companion animals, even during times of economic downturn. However, it is believed that around 75% of consumers remain unaware of the current offering. Among those that do feed their pets minimally processed foods, in the majority of circumstances it accounts for less than 25% of their pet's diet. This suggests opportunities for further growth as pet parents become more aware of and comfortable with the minimally processed proposition. Therefore, this segment is expected to continue to outperform the wider pet market in terms of growth.

[▶ SEE NEXT PAGE](#)

### Direct-to-consumer (DTC) sales channels enhance brand success

- Across Europe, online sales in the post-COVID-19 pet food market account for roughly 10% to 15% (depending on the country), which is approximately 3 to 5 points higher than pre-pandemic levels.
- In the minimally processed category, the online share of sales is typically much higher.
- As investors evaluate opportunities, a strong DTC pattern with a sticky customer base can materially enhance the success of a brand.

### Co-manufacturing strategy is less relevant

- In recent years, many premium brands that are not involved in minimal processing have relied on co-manufacturers. Rather than owning their own factories, they outsource their manufacturing process to a partner. This approach allows brands to scale quickly, without needing to raise the additional capital associated with an own manufacturing operation.
- In contrast, minimally processed pet foods are more complex and require an extra level of care in the manufacturing process. This is because there is an element of risk involved from live bacteria when producing raw or gently cooked (and subsequently chilled) food.
- Therefore, minimally processed brands typically require more capital early on in their development phase in order to fund factory construction projects.

### Local sourcing of minimally processed brands is an added advantage

- While mainstream pet food brands have fallen victim to shortages and delays in recent months, minimally processed brands are generally domestically focused and therefore less susceptible to supply chain disruptions.
- Major advantages of self-manufactured strategies include the ability to source ingredients locally and guarantee safe and clean processes as well as fast delivery to the customer.

### Customer loyalty remains key

- Investors are tracking targets that deliver rapid growth, and this is often fueled by a sticky customer base.
- Many investors will look to conduct cohort analysis to measure the loyalty to a brand among consumers

### *The raw and fresh pet food category is experiencing a yearly growth of around 10%.*

as well as the longevity of a cohort's allegiance to a brand. Brands with proven long-standing customer relationships and sticky recurring revenue streams will attract investor capital.

- Minimally processed pet food brands typically employ a DTC subscription model, which helps drive customer retention and fosters a closer relationship between brands and their customers.

### Where is the investment going?

In the European market, a lot of minimally processed brands are smaller venture capital-backed or privately owned companies. Many of these early-stage brands are balancing the rapidly changing, inflationary conditions defining today's marketplace with the rate of consumer demand and their own growth ambitions.

Various transactions have materialized in Europe over the last 2 years. For example, in 2021, Butternut Box, a UK-based DTC freshly prepared foods business, raised €45 million (\$48M) in a round led by L-Catterton to fund its continued growth. Supported by its new facility opened earlier that year, Butternut Box saw sales grow by 51% to €40 million (\$42.66M) in the year to December 2021. In May 2021, Scottish raw pet food brand Bella & Duke raised €8 million (\$8.53M) in a round led by BGF. The company has experienced rapid growth in recent years, as it targets more than €50 million (\$53.33M) in revenue in the next few years.

Early last year, the fresh cat food subscription service KatKin secured €21.6 million (\$23M) in a round led by Verlinvest and Perwyn. Not long after that, in July 2022, Axcel acquired premium pet food manufacturer Voff Premium Pet Food. We expect more brands to be added to this list, either due to capital raises or mergers and acquisitions (M&As), in the near future. ♦



Alex Masters, Charles Walder &  
Tom Cunningham  
lincolninternational.com



# Global pet industry

Both retailers and pet brands weigh in on inflationary pressures. How will the industry's supply chain evolve in 2023? Sustainability is high on the agenda of the European market. You'll discover new developments in cat litter. And more.

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# Higher production costs, higher retail prices?

**The current inflationary context puts more pressure on pet food manufacturers and retailers when it comes to price increases. We capture the views from both sides.**

Inflation creating tension about prices across all categories of fast-moving consumer goods is nothing new. And pet supplies are no exception. While manufacturers are dealing with increased costs along the production process, retailers are seeing how this is affecting the price pet parents have to pay.

## Impact on retailers

Various retailers have expressed their disagreement with increases to the prices of pet supplies in the context of inflation. In some cases, this has become a public dispute between big manufacturers and retail players.

Recently, online retailer zooplus refused to comply with Royal Canin's price increase. It notified shoppers on its platform about the "excessive" price hike adopted by the Mars subsidiary, saying that it didn't want to pass on the high costs to pet parents.

In July 2022, Tesco outrightly rejected an "unjustifiable" price increase by Mars Petcare. The British supermarket chain stated that the brand had increased the prices of its products at a time of high inflation.

## Volatile price changes

There are also price pressures on the other side of the Atlantic. Cyndi Cardenas, Senior Director Divisional Merchandise Manager at Florida-based Pet Supermarket, says that the local retailing industry is experiencing "volatile price changes" in comparison to prior years. "We expect to see costs stabilize, as supply chain challenges and disruptions level off. However, we do not have an indication of when that would be."

Some retailers, such as UK pet store chain Jollyes, are using the price war to push their own private label portfolio. "We're deliberately holding back prices on private labels and customers are reacting very positively to that," admits CEO Joe Wykes.

## Absorbing the costs

Raw materials, which account for around 80% of the operating costs of pet food, are one of the headaches that the industry has been facing since the start of the Ukraine invasion.

Royal Canin states that the production of its formulas requires raw materials that are "greatly affected

*The price of wheat has been on a downward trend for a while.*

by rising costs" as well as by inflation in packaging, transport and energy. The pet food producer says it is "absorbing these rising costs as much as possible", as it prioritizes providing cats and dogs with "high-quality, precision-engineered food" without compromising at all on the quality of its solutions.

The good news is that the price of wheat, commonly used by manufacturers in pet food formulation, has been on a downward trend for a while. Since the implementation of the Black Sea grain deal, it is believed that the price of this cereal has decreased by 37%.

**Are price increases really necessary?**

At Mars, they point out that price adjustment is usually "necessary" in a volatile marketplace marked by wide-ranging inflationary pressures. However, they claim they will "continue to absorb these rising costs as much as possible".

The pet food maker says that they are "constantly reviewing" a whole range of factors that impact the business, including raw materials, transport and the supply chain.

Nestlé says it is doing everything possible to keep costs down, such as managing external inflationary pressures and finding internal savings, while increasing prices responsibly. Some of the extra costs are being absorbed with efficiency gains and reductions. This includes cutting marketing expenses and investing in energy consumption improvements in the production process.

The multinational's goal is to keep products affordable and accessible for consumers while still "paying fair prices to our suppliers, including farmers for their sustainably produced raw materials". ♦



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# What's next in the pet food supply chain?

The pandemic sent shockwaves of logistics disruption. Awareness of the latest key trends can help pet players to future-proof their business and their supply chain.

It's safe to say that the pandemic swiftly and significantly affected every aspect of supply chains. Heightened demand, trade restrictions, factory closures, rising freight rates and reliance on 'just-in-time' inventory systems led to severe shortages and disruptions.

After several years of logistics disruptions, production delays and doubling down on technology investments, supply chain leaders in the pet industry are pausing for breath and looking at what's next. Here are 5 trends that we think warrant special attention this year.

## 1. Growth

While no one can predict the future with 100% accuracy, we do know for sure that the rise in pet ownership brought on by the pandemic will continue to fuel growth in the pet industry for some time. According to The American Society for the Prevention of Cruelty to Animals (ASPCA), more than 23 million American households – equivalent to nearly 1 in 5 nationwide – adopted a pet during the pandemic. This surge in pet ownership has led to a lot of changes in the way the pet industry distributes products.

Research from Fortune Business Insights predicts that supermarkets, hypermarkets and other mass merchandisers will remain a dominant force in sales channels globally. The main reason for this is "high consumer preference for buying products from large retail stores, where they are offered an abundance of choices in terms of brands and prices", according to the findings. However, growth in this segment is likely to be boosted by attractive displays in specialty pet food retail stores, coupled with the availability of premium food products. These are growing in popularity as the

rising per capita income of consumers motivates higher spending on healthy and organic food products.

The sale of pet food products through online channels is also anticipated to intensify globally. This can be attributed to millennials' preference for online purchasing and the overall convenience it offers to all consumers.

## 2. Industry consolidation

As the pet industry continues to grow and outsized returns are realized, capital inflows are driving expansion and competition. Today, 5 major players hold more than 60% of the global market share. These market players are continually making efforts to increase their market share and establish their dominance. Innovative product launches, brand strengthening and a focus on online distribution are just some of the ways the major players are putting pressure on smaller players.

Some of these are responding with acquisitions of their own. For example, Pet Food Experts, a leading distributor of pet food and supplies, has grown from running a single retail shop to servicing a vast network of over 6,500 independent pet retailers in 39 US states largely by acquisitions. But with growth come distribution network challenges. Pet Food Experts has tackled these challenges by opening a new distribution center in Pennsylvania to service the East Coast and modernizing a facility in Washington to service the West Coast.

## 3. SKU proliferation

As the demand for e-commerce continues to grow, order profiles are being impacted.

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"After completing more than 50 Storage Type Analysis projects, we've noticed one consistent trend," says Michael Wohlwend, Managing Principal at Alpine Supply Chain Solutions. Storage Type Analysis is an exercise that considers detailed SKU data, including size, shape and turnover rate.

"Traditional order profiles have more items and the quantity of each item is higher, which allows for easier picking. In contrast, e-commerce order profiles average 1.8 items per order, which requires significantly different, more complex picking strategies." To adapt to this, pet food distributors should take a look at their entire layout and audit their space, flow and usage. Areas to focus on include:

- *The physical environment*: Consider what can be done to accommodate higher SKU count/order picking velocity from the same footprint. Evaluate how changes to the warehouse layout, racking, shelving and bins can accommodate smaller orders.
- *Automation*: Evaluate technology that can be harnessed to accommodate higher SKU count/order picking velocity.

#### 4. Rising demand for fresh food

The size of the US fresh pet food market, which was \$5.89 billion (€5.53B) in 2017, is estimated to progress at a yearly growth rate of 23.71% to reach \$11.1 billion (€10.5B) by 2027. Handling more refrigerated products often requires changes in the warehouse, as Alpine Supply Chain Solutions knows from experience.

When the integrated logistics services provider engaged with Pet Food Experts, the company's temperature-controlled business was increasing so much that more freezer space was needed. Pet Food Experts had been using chest freezers and reefers, but they decided the time was right to add a permanent 6,000 sq foot freezer to their distribution center. This meant reorganizing how their bulk dry goods and smaller non-food items and assortments were stored to make space for the new freezer.

Alpine conducted a Storage Type Analysis to determine the best storage option for picking and replenishment locations based on each SKU's unique characteristics. This resulted in the decision for a new pick module

option for smaller non-food items and the relocation of about 1,000 SKUs from the dry goods area. Besides making room for the new freezer, this also created both picking and replenishment efficiencies.

#### 5. Labor challenges

Labor challenges are a reality that all distributors will continue to face, irrespective of their industry. Those who expand their use of systems and technology will be best positioned to drive consistency and improve product placement in the market.

"The labor pool has been shrinking for years, yet most of our customers' shipping volumes have continued to grow year over year," says Ron Rafe, Managing Director at Alpine Supply Chain Solutions. "A lack of labor is a problem for all businesses and a huge factor leading to an interest in warehouse automation." 2 of the automation options that may be worth considering are:

- *Automated material handling*: In typical non-automated operations, over 60% of an operative's task time can be taken up by moving around the warehouse. It is critical to minimize this non-value-adding 'travel time' by bringing products to them, whether by using conveyance systems, co-bots, automated guided vehicles (AGVs) or other solutions.
- *Pick-to-light*: This illuminated system visually directs the worker to the correct location, item and quantity while allowing them to keep their hands free. This increases productivity, accuracy and safety.

According to Lisa Chai, Partner and Senior Research Analyst at ROBO Global, 80% of warehouses today have no automation at all. Another 15% have some automation, while just 5% have implemented more advanced technologies. Despite this seemingly low uptake, many industry experts believe adoption will start to increase over the next 5 years, driven by several trends including the ongoing labor shortage, warehouse integration and the growing availability of better and more affordable solutions. ♦



**Jim Chamberlain**  
Senior Managing Director  
Alpine Supply Chain Solutions



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# Private label is thriving online

**The current economic situation is driving growth of private label brands in e-commerce. How healthy is the category and how are producers coping with the increased demand?**

When purchasing pet supplies, pet parents are looking for the perfect mix of good quality at a lower price. While private label is widely extended offline, online players are increasing their offering lately, not only in pet food but also in supplements.

## State of play

According to Euromonitor, pet-related private labels achieved an average annual growth rate of 6.2% from 2016 to 2021, peaking with an increase of nearly 10% in 2021. Euromonitor analyst Zsófia Megyeri comments that the private label segment is seeing stronger performance in Europe – with some especially positive developments in the east of the region – and in the US. Researchers note that the segment is performing better in those markets with higher pet population growth.

## Growing the market share

Online pet retailer zooplus, which sells more than 30 private-label pet food brands for cats and dogs, has enjoyed a fair share of that business growth in recent times. “By meeting the needs and adapting to trends – including local ones – we are able to run a highly successful multi-million own-brands business in Europe,” states Chief Merchandising Officer Alejandro Bethlen. The e-commerce company notes that more and more of its customers are “re-evaluating their purchases through a value lens”. This is driving the

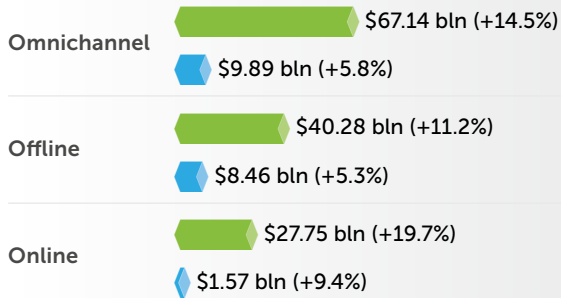
shift toward private label products that still offer high-quality nutrition and support animal well-being, but at a lower price.

## Big e-commerce players

E-commerce giant Amazon introduced its own-label pet food brand called Wag in 2018. Today, the company has other brands, including Solimo, Lifelong, Kitzy, Wonder Bound and Simply Perfection. With its private label portfolio for pet supplies, the online retailer wants to offer a wide selection of ‘everyday essentials’: high-quality items at low prices. Another online retailer, pet products specialist Chewy, announced last December that it was launching its first private label supplements brand. Chewy’s CEO Sumit Singh recently told investors that there is “an opportunity to ramp that up” in private labels.

Meanwhile, Petco revealed a partnership with JustFoodForDogs last year to co-develop and produce a new human-grade fresh and frozen pet food line under its WholeHearted line. “With many pet parents already focused on supporting their pets’ whole health by feeding them high-quality nutrition, plus the great success of our private-label pet food brand called WholeHearted, we saw a clear opportunity to invest in helping families bridge the gap between fresh, human-grade pet food and an uncompromised, affordable price,” says Amy College, Chief Merchandising Officer at Petco.

## Sales of all pet categories (US, 2022)



■ National brands   ■ Private label

Source: NielsenIQ

### Golden opportunity for manufacturers?

Private-label pet food makers around the world are witnessing an increase in the requests they receive from e-commerce players. American manufacturer Alpha confirms this. Similarly, Michal Vinický, Private Label Manager at Czech producer VAFO, has noticed a strong interest in the premium and super-premium segments. He adds that online retailers establish their private label portfolio with the same high level of expertise as their omnichannel or bricks-and-mortar competitors. "The bad-mouthing that online players are not able to build a brand is long gone."

### Further growth

NielsenIQ sales data shows that pet food private labels accounted for \$3.6 billion (€3.4B) in sales offline (+15.3%) and \$741.9 million (€697M) online (+15%) in 2022. British pet food manufacturer Inspired Pet Nutrition (IPN) announced in May 2022 that it was tripling its production of wet dog food and creating its own private label. According to the company, the wet private label products look set for even further growth. Likewise, PetDine, a Colorado-based private label manufacturer of supplements and treats, tripled its production capacity earlier this year with the aim to create "significant opportunities" in the private label category. ♦



**Jochebed Menon**  
PETS International Contributor

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# The ever-increasing need for speedy deliveries

**Same-day delivery is becoming increasingly commonplace in pet retailing. What is the industry doing to improve its competitiveness and adapt to the 'new normal'?**

In the last 12 months, a number of major pet retailers – both online and offline – have introduced a new delivery service or expanded their existing one by adding next-day or even same-day options in a bid to attract new customers, retain existing ones, and give themselves a clear competitive edge. This new delivery approach now seems to be spreading to other retailers in the pet industry.

## State of play

In July 2022, the UK's Pets at Home expanded its same-day delivery option to a total of 128 UK stores, in collaboration with logistics firm Stuart. In September of the same year, Mars started working with grocery delivery platform Instacart to make its entire portfolio, including brands such as Pedigree, Royal Canin and Whiskas, available to 90% of the US population via rapid delivery. And in December, US company PetSmart teamed up with distribution platform Shipt to enable same-day delivery of its pet food, supplies and accessories.

Rapid delivery is already well-established in parts of Asia and the Middle East too. In Dubai, for example, Pet's Delight – which sells through 10 UAE stores as well as online – offers both same-day and next-day delivery for orders placed prior to 8.30 a.m. Meanwhile, in Southeast Asia, Singapore is one example of a market with a high e-commerce adoption rate. Pet parents in the nation-state now have a plethora of options to choose from, with Happy Town Pets, PetCubes and Bubble Pets among the numerous retailers offering same-day delivery options.

## Quick is key

This global trend is being driven by the same factors that are fueling the growth of rapid delivery across all consumer goods categories, according to Beth Tofel, founder of PawprintID, a digital health service for pets. "As humans, we're continuing to demand faster delivery and we're not changing those habits when it comes to our pets," she says. "With everything else in our lives at our fingertips, pet parents want the

[▶ SEE NEXT PAGE](#)

same level of instant gratification. We also want to be able to care for our pets in the same amount of time we care for ourselves or our children. Quick is key.”

Meeting these emerging customer expectations isn't always easy. After all, same-day delivery services require highly efficient and often costly distribution networks. For some major retailers, this can be achieved using their existing logistics frameworks. For example, when US health and wellness retailer Petco expanded same-day delivery across its entire catalog of fresh and frozen food in 2021, it was able to leverage its nearly 1,500 existing fulfillment centers to do so. “This expansion builds on our successful same-day delivery program and gives us a distinct competitive advantage over retailers who ship these products more slowly and with greater environmental impact,” said Chief Digital and Innovation Officer Darren MacDonald at the time.

### User experiences with same-day delivery product:



Source: Digital Commerce 360-Bizrate Insights survey, August 2022

### Delivery apps

Alternatively, retailers can opt to offer rapid delivery in conjunction with specialist partners, whether logistics specialists, food delivery companies or rapid delivery apps. When PetSmart announced its nationwide partnership with Target-owned Shipt in late 2022, for example, it benefited from an ecosystem of brands already sold via the platform and an existing network of rapid delivery customers, half of whom are pet parents, according to Shipt.

Other rapid delivery apps have broadened their portfolio from groceries to pet products. Beelivery now makes major brands – including Whiskas, Pedigree,

### *In Asia, there is now a plethora of same-day pet product delivery options to choose from.*

Iams, Cesar, Purina, Harringtons, Wainwrights and Sheba – available to urban UK consumers in as little as 15 minutes, for example, using a crowd-sourced delivery driver model.

Zapp does much the same with high-end brands, including Daylesford, Scrumbles and The Pack, getting them to consumers' doorsteps in as little as 20 minutes. “Our mission is to delight customers with things that make them happy, the moment they need it and this includes last-minute treats and staples for their much-loved pets,” says Steve O’Hear, Senior VP of Strategy at Zapp. The company says its platform has seen demand for pet products increase recently, with peak ordering taking place between 10 p.m. and midnight. Premium wet and dry food as well as cat litter are among its best-performing products.

### Rapid trajectory

Rapid delivery of pet care products is clearly on an upward trajectory globally, according to Wendy Diamond, Chief Pet Officer of Animal Fair Media. Not only did same-day delivery orders for pet supplies increase by 293% during the pandemic, but this service in the pet care industry remains “a rapidly growing trend, with a projected 8.7% yearly increase from 2021 to 2028,” she says. What’s more, this option attracts a demographic with higher levels of disposable income, who are prepared to dig deep for the convenience. In short, “pet parents are willing to pay more for same-day delivery”.

It is evident that, in the post-pandemic era, customers increasingly expect to be able to obtain pet care products with the same speed and convenience as they do their groceries, fashion items and other essentials. For retailers, there’s a strong incentive to meet that need as fast as they can. ♦



Megan Tatum  
PETS International Contributor



# Working on a net-zero industry in Europe



**The European Commission is scaling up actions supporting its climate targets, and pet food manufacturers will need to comply with them too.**

The deadline expires in 27 years, but Europe is already putting forward initiatives to become a climate-neutral continent by 2050, as established in the European Green Deal.

One of the latest proposals presented by the European Commission, in February 2023, is the so-called Green Deal Industrial Plan. This aims to enhance the competitiveness of European industries and support the transition to carbon neutrality along the supply chain.

## Zero emissions

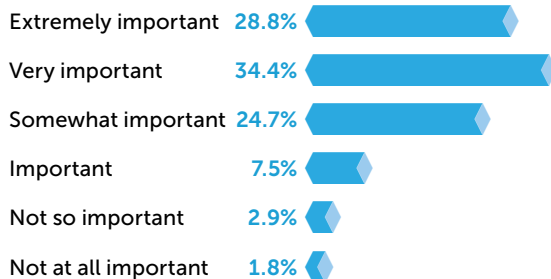
An important part of the new plan is the Net-Zero Industry Act. The new set of rules is expected to lower the administrative burden and attract investments for developing net-zero manufacturing projects.

Some pet players are already working toward a circular economy, with the aim of achieving all these goals even before the 2050 deadline. Belgian pet food brand Edgard & Cooper, for example, plans to reach zero carbon in its operations in 2 years' time, and to reduce emissions in the supply chain by 2030.

Other big manufacturers, such as Royal Canin, also have 2025 as their deadline for becoming a certified carbon-neutral company. The pet food manufacturer tells PETS International that they are indeed on track to achieve this target.

"We are seeking to reduce greenhouse gas emissions through the progressive reformulation of our products, including switching to low-carbon intensity ingredients, without compromising nutritional performance, quality and safety," says a spokesperson.

## How important is sustainability for pet parents?



Source: PETS International/Yummypets survey, January 2022

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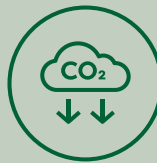
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## Too much packaging waste?

The Pet Sustainability Coalition (PSC) believes that the US pet food industry produces around 300 million pounds of plastic waste each year. Such numbers are not available for Europe, but EU officials warn that 40% of all available plastic and 50% of paper are used for packaging in the region.

Last November, in a bid to tackle the “constantly growing source of waste”, Brussels proposed a revision of the current packaging and waste legislation. The new rules are also meant to counter consumer frustration. According to a recent survey by the European Association of Carton and Cartonboard manufacturers, 55% of consumers have growing concerns about the environmental impact of plastic packaging.

## What are the recycling targets?

The new EU Packaging and Packaging Waste Regulation (PPWR) targets a 15% reduction in packaging waste by 2040. It also wants to achieve a 73% rate of overall packaging recycling by 2030, and implement standardization of packaging formats. For plastic, the recycling target will be 65% by the end of 2025, and 70% after another 5 years. This would apply to both domestic and imported products.

The revised legislation would also make the use of pictograms on packaging mandatory. These indicate reuse options in a bid to “help consumers make informed choices”.

The Commission’s proposal is now heading to the co-legislators – the European Parliament and the Council of the European Union – that will assess and, potentially, amend the text. If adopted, it will be a European law that will come into force in all EU nations.

## Eco-friendly packaging

The pet industry is already working on presenting more eco-friendly packaging to consumers.

Purina aims for 95% recycled packaging across its pet food portfolio by 2025. The Nestlé subsidiary says its small plastic pet food bags will begin transitioning to a material that is recyclable at store drop-off later this year. “We are on track to reduce the use of virgin plastic by a third by 2025, and we continue to increase

## *Europe wants to reduce packaging waste by 15% in 2040.*

the use of recycled content in our Tidy Cats cat litter packaging.”

In a similar move, Hill’s plans to switch to completely recyclable dry pet food packaging by 2025.

Last year, packaging multinational Mondi started investigating the use of non-paper components in perishable pet food packaging. The firm recently developed a pre-made mono-material polyethylene (PE) bag for a dry dog and cat food product sold by Norwegian pet food manufacturer Felleskjøpet.

## Self-service pet food

In a bid to reduce single-use plastic pet food bags, Canidae Pet Food implemented a “disruptive technology” in 2022. This enables pet parents to buy kibble through a self-serve merchandiser, using reusable kibble bags, across 100 Petco locations in the US.

According to the company, consumers will pay less than \$3 (€2.77) per pound, saving up to 40%. Canidae expects to sell nearly 400,000 pounds of food in the first year of operation and save the use of 50,000 bags.

## Positive consumer research findings

Despite the current headwinds, consumers seem to be supportive of more eco-friendly packaging across all the fast moving consumer goods (FMCG) industries.

A 2023 PwC global survey concluded that 77% are willing to pay more for a product made from recycled, sustainable or eco-friendly materials.

European research, conducted by Trivium Packaging, discovered that 86% of consumers under the age of 45 are willing to pay more for sustainable packaging. What’s more, nearly 7 out of 10 consumers have recently chosen a product based on its sustainability claims. ♦



**David Palacios Rubio**  
Head of Editorial  
GlobalPETS

# Toward a sustainable future for pet food packaging



## The European Commission recently presented a new set of regulations to tackle packaging waste. How are they likely to impact pet food manufacturers?

FEDIAF welcomes the initiative as it is a great opportunity to encourage harmonization across the EU. It will also encourage Member States to rely on a European framework that contributes to the functioning of the single market. However, there are some points to consider in the current proposal that need further clarification and precision – packaging recyclability, reduction, recycled content, plus labeling.

### Important changes to come

Pet food packaging – pouches, cans, bags and trays – is critical to ensure that the product is kept safe and fresh and retains its nutritional quality. It's also providing important factual and legal information to pet owners about the food they are purchasing for their pet.

The European pet food industry is fully committed to reducing the environmental impact of pet food packaging and welcomes the updates to the European Commission's Circular Economy package. As the changes in packaging legislation might have a significant effect on the industry, FEDIAF's Environment and Sustainability Working Group is closely monitoring the development of this policy.

### Packaging recyclability

There are a number of innovations aiming to simplify packaging in order to improve its recycling performance. But there is a need for a common EU

definition of recyclability, based on the potential of the packaging material to be recycled while considering existing and emerging technology and infrastructure.

Collecting, sorting and recycling technologies and infrastructure should be further developed across the EU to meet common minimum quality requirements. Rules should also be established – and harmonized – for the safe recycling of plastic materials other than PET into food contact materials.

Extended Producer Responsibility (EPR) schemes, which focus on the producer's responsibility for their product's impact in the final stage of its life cycle, are in place in a number of EU countries. Under these schemes, producers are responsible for waste management. That includes the collection of used goods, plus sorting and treating for recycling. EPR schemes should be enhanced to increase packaging waste collection and sorting.

### Packaging reduction

We support measures to reduce and improve packaging that are based on scientific evidence, and follow a lifecycle approach, as we recognize the role of packaging in protecting pet food safety.

Again, pet food packaging is critical to ensure that the product is kept safe and fresh and that it retains its nutritional quality.

## Plastic recycled content

Increasing the recycled content in packaging is key to reduce the use of resources and reach a circular economy. We need to ensure that the recycled plastic materials used in packaging that comes into contact with food are safe – and readily available to the pet food industry.

Chemical recycling is a technology that complements mechanical systems when flexible plastic packaging is recycled. We need certainty that, firstly, we will be able to use the recycled content produced by this technology to support our industry's circular economy and, secondly, that chemical recycling will be accounted for in recycled content targets.

## Harmonized labeling

Waste management guidance can empower consumers to contribute to a more circular economy. The pet food industry welcomes the proposal to develop an EU-harmonized labeling scheme that will enable consumers to improve their packaging waste sorting. Our request is that no new national packaging

*Waste management guidance can empower consumers to contribute to a more circular economy.*

initiatives are introduced until the EU's Packaging and Packaging Waste Regulation (PPWR) is in place.

## Significant progress

The European pet food industry has been making significant progress in reducing and optimizing the use of packaging materials, finding sustainable alternatives to non-recyclable plastic, and increasing the use of recycled content.

As the Commission's proposal progresses, FEDIAF is keen to highlight key points that will ensure pet food safety, essential to the health and welfare of over 300 million pets in the EU, alongside the broader policy objectives aiming to minimize packaging and waste. ♦



**Alice Tempel Costa**

Deputy Secretary General of FEDIAF  
europeanpetfood.org



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# Shaping the industry's future with blockchain

**From medical records to supply chain optimization, companies are exploring ways to introduce blockchain technology in a bid to keep their competitive edge.**

Powerful data is a modern-day commodity. Experts agree that investing in data technology is a must to stay ahead in an ever more complex data-based economy.

Blockchain offers the promise of secure data accessibility and full transparency. However, trust in the network, the security of the data stored, and the very high price of implementation are potentially inhibiting factors for companies considering the adoption of blockchain.

## How it works

Blockchain is nothing less than a public database. All data is permanently inscribed, which makes changing records or data impossible. This boosts data transparency at all levels. In practice, records may contain items such as descriptions of activities, details of processes, and information about the parties involved.

Insiders believe that this technology can transform whole supply chains: making them inclusive and transparent. The World Economic Forum forecasts that 10% of global gross domestic product (GDP) will be stored on blockchain by 2025, including product identifiers, medical records, land registries, academic degrees and insurance contracts.

## Applications for the pet industry

Especially for the pet supply chain, blockchain appears to be gaining ground. For instance, China-based VeChain offers blockchain traceability technology for pet food manufacturers with the aim to 'quickly bring health concerns about pet food safety under control'.

The platform uses the so-called 'immutable provenance technology' (scanning a QR code) to prove, for instance, pet food packaging origin, validation of the product's high-quality ingredients, and tracking of the product's entire value chain in a transparent way.

"Blockchain can not only increase the efficiency of a company's internal supply chain, but also potentially prevent damages to a company's reputation during recalls. Increased traceability data enable companies and authorities to quickly track and trace problematic batches of products, significantly increasing consumer trust and safety," according to a company spokesman.

## Animal shelters

On a less commercial note, animal shelters, for example, also stand to benefit from blockchain. Shelters are still not required to report the number of pets that they take in, adopt out or euthanize, with documents still largely stored as physical copies.

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Blockchain technology has the capability to transform the reel. Records of activity can be taken at every point in the system, from when the pups are born, to when they're vaccinated, transported and sold – all the while ensuring that everything is protected from fraud.

Such transparency will also get stolen and found pets back to their owners. The American Kennel Club (AKC) estimates that 2 million dogs are stolen each year in the US. Even if someone can be lucky enough to find the animal again, proof of ownership is essential.

### New players in the market

Over the past years, several companies have entered the pet market, offering blockchain solutions for data-related challenges.

In 2018, Pawtocol launched the world's first pet fund based on blockchain technology that supports animal shelters. The company has been working on building a platform that allows requesting, purchasing and organizing recorded pet data. The entire platform is built on Ethereum, one of the main blockchain systems in the world and a community-run technology powering the cryptocurrency ether (ETH) and thousands of decentralized applications.

The company expects a future where every pet 'is identifiable on a blockchain'. Owners will be able to access information from data points available across pet products and services.

In a similar vein, Pawtocol also recently launched its blockchain-powered social platform Kingdom. By sharing their data, pet owners can create non-fungible tokens (NFTs) to represent their pets digitally and all information related to them.

### Data collection as business case

The company rewards pet owners for sharing information about their furry friends: from vet visits to purchases in pet stores. Similarly, users can share data about their pet, and in return they are rewarded with a cryptocurrency called Universal Pet Income.

According to the company, vendors, researchers and other parties are interested in paying for the high-integrity data Pawtocol collects.

## ***Blockchain technology can quickly bring health concerns about pet food safety under control.***

AnimalGO offers a similar service in South Korea, where users can upload pictures of their pets and submit data through an artificial intelligence-based mobile app. Since its launch in 2020, more than 100,000 pet parents have downloaded the application. The data stored is used to analyze consumer behavior and health patterns. In exchange, pet parents receive cryptocurrencies to purchase goods inside the platform.

The company also offers offline ecosystems, like AnimalGo Park and AnimalGo Beauty, providing services such as a daycare hotel or swimming pool that can be paid for using cryptocurrency.

An investment holding company bought 43% of the company in 2022, which is now worth ₩10 billion (€7 million / \$7.6M).

### Current expectations for a future with blockchain

Transparency comes at a cost. It is estimated that a simple blockchain application can cost \$15,000-\$40,000 (€13,700-€36,600), reaching \$130,000 (€119,000) if it requires more complexity. For a small company, costs can be even higher, as implementing this technology requires a team of full-time developers.

A survey by the China Academy of Information and Communications Technology (CAICT) analyzed more than 80,000 blockchain projects worldwide in 2018, but only 8% managed to remain active after a period of 15 months. "These projects came out very quickly, but died quickly as well," concludes He Baohong from the CAICT.

For the time being, despite its potential, implementing blockchain technology in the pet industry can be expensive, with some still to be faced challenges in the long run. ♦



**Edgar Maciel**  
PETS International Contributor



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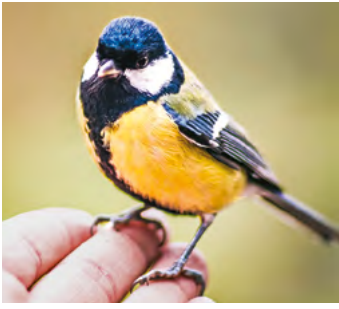
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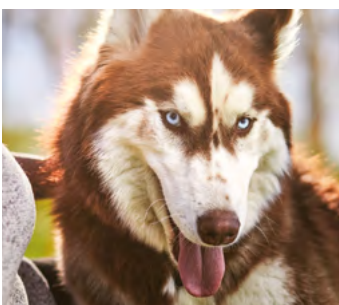




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# Small pets for big cities and younger owners

Small animals are gaining popularity among Gen Z, looking for more affordable furry friends to live with them in urban areas.

The cuddly, docile guinea pig or the smart and busy hamster has always been the classic starter pet. And today still this holds true. Such small pets often serve as a point of entry for households looking to upgrade to a dog or a cat at some point in the future.

But there is a difference: today's small pet parents aren't just young children and teens. They're more likely to be young adults with growing families. Or renters in large metropolitan areas, looking to get established in their careers while keeping a pet at home that fits with their social, urban lifestyle. Interestingly, according to the 2021-2022 American Pet Products Association (APPA) National Pet Owners Survey, they may not think of themselves as 'pet parents' at all.

## Demographic divide

It's not only hamsters and guinea pigs which are gaining popularity. Ownership of small pets such as rabbits, ferrets and mice has risen in recent years and 5% of US households now have a small pet, compared to 4% in 2018.

"In the last 2 years with the pandemic, the number of small pet and bird owners has increased noticeably," according to Sue Brown, Senior Vice President of Sales and Marketing at F.M. Brown's Sons, maker of small pet brands Tropical Carnival, Encore and Extreme.

"People who were homebound, or working more flexibly, were more likely to adopt a small pet or bird during this

time. Children were looking for a connection to a pet and their parents were excited to provide them with a small animal, instead of video games."

But the major change appears to be a generational shift: the popularity of small pets is surging within Generation Z, the demographic cohort born after 1997.

Roughly 15% of Gen Z-ers owned a small pet in 2020. It makes this generation the only one with small pet ownership above 10%, according to the National Pet Owners Survey. Small pet ownership is on the decline in all other age groups, although they remain popular with millennials, who currently own 35% of America's small pets. Baby boomers, by contrast, own just 7% of small pets. Dog and cat ownership are spread far more evenly amongst the various age groups.

## The affordable choice?

While the majority of small pet parents do not cite cost as a major factor in their decision to acquire a pet, financial considerations do seem to be important.

Typically, small pet owners earn less per year than other pet owners. Not only are they younger (average age of 37 compared to 45), but they're also more likely to rent rather than own their home. In the same vein, during the pandemic, many people in this younger generation were hit by layoffs and a cut in working hours. All in all, according to APPA, they were more likely than other pet owners to report worries about making ends meet.

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## A family matter

At the same time that Gen Z-ers are discovering the benefits of small pets, the conventional take on such pets as starter pets for small children still holds true. In fact, households with small pets (versus households with larger pets) are far more likely to have small children. Interestingly, small pet owners indicate that – on the death of their current pet – they plan to replace the pet with a larger one.

The percentage of small pet owners who say their pets are “a good way to teach children how to be responsible” fell by 3% between 2018-2020. And unlike more mainstream pets like dogs and cats, the percentage of small pet owners who say their pet is “part of the family” is also down 6%.

Instead, a growing proportion of small pet owners describe their pets as a hobby that helps them to connect with like-minded people. This is especially true of pet owners with the smallest pets, such as hamsters, gerbils and mice. With size – think of guinea pigs and rabbits – owners start describing their pets as being a companion or part of the family.

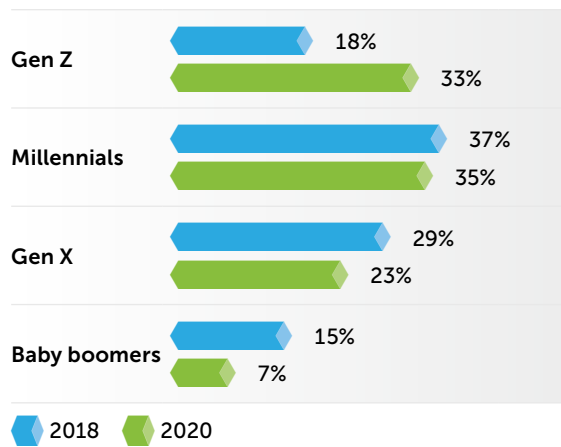
## Small pets, big spenders

Despite the limited financial means of Gen Z small pet owners, they seem to have no qualms when it comes to spoiling their pets.

In a recent National Pet Owners Survey, small pet owners (more than dog and cat owners) stated they were likely to spend more on premium pet products, including products marketed as ethically sourced, ecologically friendly, and free of Bisphenol A (BPA). Nearly a quarter of small pet owners said they preferred to buy organic pet food.

“Small pet owners are very similar to dog and cat owners, in that they want what is nutritionally best for their animals, even if it means spending more on it,” according to Dean Reyes, Director of Marketing and Sales at Higgins Premium Pet Foods. Higgins, originally a pet store, actually began manufacturing pet food in order to meet the demand for small pet products, including food and treats free of artificial colors, preservatives and flavors.

## Small pets owned by each generation



Source: APPA Generational Report

## Emotional well-being

Beyond food and nutrition, small pet owners care for their animals' long-term and emotional well-being, even beyond their own time here on earth. They are even likely to include provisions regarding the care of their pets in their will.

But, for the here and now, they buy treats, toys and gifts for their pets more frequently. Small pets also receive gifts from their owners on noticeably more holidays than dogs and cats – a finding from the APPA survey that may reflect the fact that small pet owners are significantly more racially and ethnically diverse than dog and cat owners.

However, it's unclear whether small pet owners are always able to live up to their ideals for pet ownership. 40% of small pet owners report that they will need to cut back on their spending going forward. And there's also the question of an increasing shortage of pet-related services. 21% of small pet owners say they struggle to find someone to care for their pets when they are away. And the number of small pet owners who said they could not find a qualified veterinarian doubled between 2018-2020. ♦



Emma Penrod  
PETS International Contributor



# UK manufacturer advocating for compliance in the pet care category

**Top-selling brand Animology has found a formula for success and is now impacting shelves in the UK and more than 50 other countries.**

Since 2010, Animology has been winning over consumers around the world with its bold branding and even bolder product names like Fox Poo, Stink Bomb and Dirty Dawg! Its range of pet care products, which includes shampoos and deodorizing sprays for dogs and cats, fragrance sprays, and functional grooming products, are must-haves for pet owners in many countries worldwide.

## Becoming a manufacturer

The Animology brand is owned by Group55, a leading UK private label manufacturer. The early success and growth of Animology, plus continued, growing frustration using external contract manufacturers for this brand, led Group55 to build its own manufacturing site.

Today, the site has a team of development chemists, an in-house laboratory and on-site testing facilities, as well as manufacturing and fulfillment services. The company now works for private label and white label customers around the world, across personal care, beauty and pet care categories.

## Playing by the rules

Animal welfare is of top importance to the team at Group55 and they prioritize creating products that won't harm pets. Pet care products in the UK and EU are controlled, by law, under a regulation known as CLP, which limits the inclusion levels of specific ingredients that feature in a pet product (or whether they can feature at all) before the product is considered hazardous. There are also labeling requirements that denote how the ingredients must be displayed on pack and a number of hazardous symbols that must be displayed should ingredients go above the defined levels which mark the product as hazardous.

There are further regulations internationally such as Article 95 and The Biocidal Products Regulation that all must be understood to develop the best pet care products. Group55 have made it their mission to help educate brands and retailers on the importance of these regulations and the risks that may come from selling illegal products. Unfortunately, there are a large number of brands being sold in

major retailers that do not comply with these regulations, and retailers are selling illegal products that should be marked as hazardous to pets. The impact of this could be catastrophic for pet owners, brands and retailers alike.

## Covering all needs

At Zoomark, the Group55 and Animology stand will also debut its newest venture with partner company Start Products on the international stage. Start Products is a white label manufacturing division for off-the-shelf pet care formulations that can be customized with a customer's own branding. This is an ideal offering for businesses that don't want to wait for custom product development, or want to order smaller quantities of products than private label manufacturing would typically allow. ♦

**Zoomark 2023 – British Pavilion  
Hall 26, Booth A17/B18**

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**Zoomark 2023 – Hall 25, Booth C94**

<sup>1</sup> Kynetec VetTrak December 2022. Sales of YuMOVE branded joint products through veterinary wholesalers.

<sup>2</sup> YuMOVE brand tracking study 2022.

<sup>3</sup> Canine study conducted by the Royal Veterinary College. Excludes Young Dog.

<sup>4</sup> For full terms and conditions see YuMOVE.co.uk/YuMOVE-guarantee.

**Lintbells Ltd.**  
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# Novel ideas hit the organic cat litter market

**Environmental awareness is a growing issue in the cat litter segment. We analyze how players around the world are responding to new sustainability demands.**

Sustainability is a hot topic in most sectors, and the cat litter market is no exception. The segment has traditionally been driven by clay-based products, accounting for 40% of the market. New natural cat litter products are increasingly emerging that contribute to reducing the pet's carbon footprint.

## **Ethical products**

Allied Market Research forecasts that the cat litter market is expected to reach \$11.2 billion (€10.5B) by 2030 and register annual growth of 4.7%. There is a good chance that much of this growth will come from sustainable cat litter, based on recent research. According to the American Pet Products Association's (APPA) National Pet Owners Survey 2021-2022, more than 50% of pet parents were willing to spend more on ethically sourced and eco-friendly pet products, including cat litter.

## **Willingness among pet parents**

Although the spending on such products differs from market to market, various players have noticed a willingness to buy eco-friendly cat litter, even if it is more expensive. This is the case for South Korea's

Alfred Pet, for example, which makes cat litter using seaweed and corn starch. The company recently presented a cat litter upcycled from decaffeinated coffee grounds.

Boxiecat, a Californian-based manufacturer that creates cat litter from natural and sustainable ingredients, estimates that pet parents spend an average of \$70-500 (€65-468) a year on these products. The company admits that sustainable products come at a higher price point, but explains that this is due to superior performance and higher-quality ingredients.

## **Innovative projects around the world**

Last year, British pet product manufacturer Pettex introduced a cat litter made from soybean curds and natural starches. The soiled litter is flushable and is designed to ensure fast absorption and low tracking.

Wealthy Moggie Innovation, a Bangkok-based cat litter firm, claims to be the only company in the world to manufacture and sell a product made 100% from cassava, a Thai root vegetable. The producer raised \$288,600 (€270,112) and expects its sales to grow by



*There is a willingness to buy eco-friendly cat litter despite it being more expensive.*

10% over the next 5 years. It is currently exporting its chemical-free, all-natural cat litter to South Korea, Malaysia, Australia and the United Arab Emirates (UAE).

Melbourne-based DiaperRecycle is diverting nappies from landfills by upcycling them into cat litter. It also maintains that its cat litter is highly absorbent and flushable, besides being recycled from discarded diapers. The company raised A\$335,000 (\$226,000 / €212,000) from a public investment round last November.

### Natural and renewable

A number of big corporations have recently invested in offering natural and environmentally friendly cat litter products. For example, consumer goods giant Unilever entered the industry in 2021 with the launch of its pet care range called Cafuné in Brazil. It included a cat litter product made from all-natural, renewable and compostable ingredients, packaged in sugarcane-based plastic.

Meanwhile, Mars Petcare's direct-to-consumer (DTC) firm Natusan offers a biodegradable cat litter platform using recycled wood materials in its products. The product is created in a way that enables tight clumping. This enables pet owners to use up to 65% less litter in comparison to alternative brands, according to the company. Mars acknowledges that price plays a crucial part in consumer choices, but stresses its own role in educating pet parents that sustainable solutions are not necessarily more costly.

Last but not least, Nestlé Purina has launched what it calls 'the first cat litter in a durable and refillable container' in the US, such as for its Tidy Cats LightWeight Free & Clean cat litter. This is part of the firm's acknowledgment of consumers' crucial role in reducing waste and its commitment to improving its eco-friendly packaging. ♦



**Jochebed Menon**  
PETS International Contributor

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OdourLock maxCare is the only ultra-premium clumping clay litter that detects glucose in cat urine. Compared to the competition, it only needs one drop of blood present in the urine for the granules to detect it. This ultra-premium cat litter also uses an innovative technology that blocks ammonia for 40 days. No other health issues monitoring cat litter performs like this one!

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# Adapting litter to new trends and consumers' needs



Pet owners are spending on their companion animals in the same way as parents spend on their children. According to Euromonitor International's Voice of the Consumer Lifestyle survey, 71% of pet owners worldwide consider their pets to be family members.

Sanicat fully understands consumers' desires to provide their pets with the best care. The brand has 65 years of experience, and its mission is to keep searching for ways to deliver even better products.

## New product launches

During Zoomark, Tolsa will present various new launches: new clumping plant-based litters, and new mineral litters for Kitten and Multicat households.

**Sanicat Natura Activa** is the Tolsa plant-based litter answer for cat owners looking for environmentally responsible solutions. 2 new high-quality products, the Sanicat 100% Green and Sanicat Recycled, are both natural, biodegradable, and compostable clumping litter. Sanicat's natural recipes neutralize unpleasant odors and make it easy to clean the litter box.

Understanding pet companions' specific needs, Sanicat also launches 2 new mineral-based litters. **Sanicat Non-Clumping Kitten Litter** stands out by its superabsorbent capacity, its delicate valerian scent that piques kitten curiosity to use the litter tray, and its Oxygen Odor Control, adding the natural power of oxygenation to neutralize and decompose bad odors. Its non-clumping formula is a safer solution in case the litter is ingested, while also soft and comfortable for small paws thanks to its microgranules.

**Sanicat Multicat Clumping** is the ideal solution for households with 2 or more cats. After years of research, the special formula grants a very high odor-control result, effectively fighting both urine and bad odors.

## Environmentally responsible

Sanicat's purpose is: "Nature at heart. We care about cats, homes and the planet. Nature is our responsibility and our source of inspiration. This guides everything we say, do and create."

The whole Sanicat mineral and plant-based assortment is the answer for cat owners looking for an environmentally responsible solution. Since a few years, Sanicat has initiated to reduce its own impact on the planet. They collaborate with external consultants to get independent well-known certifications, to prove their sustainable practices. Sanicat products do not use plastic, packaging is made in recyclable paper or carton certified FSC, using biodegradable inks. Classic and Clumping mineral products produced in Madrid in 2022 obtained the Carbon Trust Measured footprint validation.

By extending its ranges in 2023 with new products, Tolsa helps consumers to make conscious choices and offer their furry friends a clean space, while also keeping the environment in mind. ♦

**Zoomark 2023 – Hall 30, Booth C71 – C73**



**Anna Toniutti**  
Pet Care Marketing Director  
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sanicat.com

# Taking the pulse of the pet furniture market



**After a boom during the pandemic, the pet furniture segment may experience a setback this year, following a general consumer trend to spend less on longer-lasting items.**

In line with the rest of the pet sector, an increase in pet ownership during 2020 and 2021 led to growth in the sales of pet-related products and accessories. Economic headwinds are now expected to impact some non-essential categories, including pet furniture, but players are always trying to innovate and bring new ideas to the market.

## Temporary challenges

Pet owners are now spending more time with their pets, and becoming more attuned to their health and comfort needs when it comes to furniture.

Fortune Business Insights valued the global pet furniture market at \$3.61 billion (€3.38B) in 2021. It forecasted annual growth of 5.9% for the coming years, from \$3.81 billion (€3.57B) in 2022 to \$5.70 billion (€5.34B) by 2029. But many believe that despite the segment's overall good performance, the broader category of hard goods and supplies for pets is having a tough year in terms of growth, although this should just be temporary.

"The sector had an excellent 2 years during the pandemic, but 2021 and 2022 have been more challenging. I think we could see another slower year

before getting back to what we would expect, which is positive growth in this category over the longer term," says Lauren DeVestern, Managing Director and Partner at L.E.K. Consulting.

## Driving factors

Inflation poses a challenge to the market, with some pet owners having to cut back on spending. As pet furniture represents bigger ticket items that are generally built to last, this is not something that owners need to often replace. People may have to make choices about how to spend their money as prices rise, and some will concentrate on food and health services for their pets.

There are a few driving factors though, that will ensure the market continues to grow despite this temporary slow period:

### 1. Product innovation

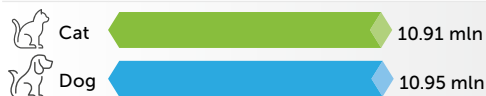
Increased awareness of pet health and comfort, the result of more meaningful pet-parent interaction during the pandemic, has led to innovations that have driven up price points. These include items like temperature-controlled bedding – with products that can even be controlled from an app – and orthopedic

## Cat and dog furniture sales on (units)

2020



2021



2022



Source: [Similarweb.com](https://www.similarweb.com)

memory foam mattresses. Some owners are looking for furniture made from chew-proof and waterproof materials, which are also more costly.

### 2. Contemporary and multi-functional

There is a growing trend for pet furniture that blends into contemporary home design. And a strong preference for furniture which is multi-functional and therefore space-saving. Traditional cat scratching posts and dog crates are being replaced by more aesthetically pleasing designs that complement modern interiors. For example, Danish start-up SØde has Nordic-designed cat furniture, featuring a multi-functional stool, cat house and scratching post all in one. And Fable Pets has revolutionized the traditional dog crate with a crate made from bent wood that is designed to function as a side table too.

### 3. Personalization

Another important factor in boosting pet furniture sales is catering for customer preferences. A choice of styles, designer prints, premium fabrics, colors and sizes enables pet owners to personalize their pet's furniture to suit their own tastes, as well as to ensure optimal comfort for their individual pet. ♦



**Karen Cornish**  
PETS International Contributor

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*curious?*

# The latest trends in pet pools

Portable and easy storage are the leading trends in the pet pool segment, which is expected to grow consistently in the coming years.

Pet pools, mostly for dogs, have been steadily increasing in popularity. Which key drivers are predicted to influence the pet pool market in the coming years? And which companies are leading the way?

## Hotter summers

The US and Europe have been experiencing increasingly hot summers and experts say that temperatures will keep rising. In addition to keeping cool themselves, pet owners will need to look at ways to help their pets cope with the heat. According to vets, dog pools are the quickest way of helping a dog to cool off – and maintain a safe temperature – on a hot day.

## Searches for 'dog pool' on amazon

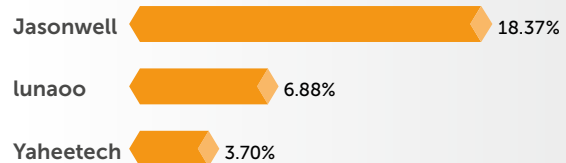


Source: Similarweb.com

## Health awareness

Dog owners have become more conscious of the dangers of overheating thanks to safety campaigns run by animal welfare charities. The signs of heatstroke in dogs are now more widely recognized by owners, and there is broader awareness of which steps need to be taken to avoid suffering. The susceptibility to heat can vary between breeds. For example, flat-faced breeds – such as Pugs, Pekingese, and French and English Bulldogs – are known to struggle even on moderately hot days.

## Top 3 brands on amazon (by market share)



Source: Similarweb.com

## Humanization

As pets are now increasingly thought of as part of the family, more and more owners are keen to provide fun activities to enrich the lives of their dogs. Lots of dog breeds love spending time in the water, particularly gundogs like spaniels and retrievers who were traditionally bred to work in rivers and lakes.

## Premiumization

Just as in other segments, there is an element of luxury or 'premiumization' emerging in the pet pool market. One Dog One Bone is one company that is taking the pet pool to the next level. Its heavy-duty bone-shaped and paw-shaped pools are made from the same material as truck bed liners. They can even be purchased with specially made decking kits for a superior, more permanent look and a deluxe experience. ♦



Karen Cornish  
PETS International Contributor



**New Age Pet® is a pet and urban farming products company that has worked for over 20 years to perfect their unique ECOFLEX® based products. This highly durable material ensures that pets are happy, healthy and comfortable for years to come.**

New Age Pet specializes in comfortable and attractive pet furniture that pets love and humans are proud to display. Designing modern, sleek and practical products for dogs, cats, chickens, reptiles and rabbits is their pride and joy. They carefully craft and inspect their high-quality products to bring elegance and style into pet-friendly homes around the world.

#### BACKGROUND

The company is headquartered in the San Francisco Bay Area in the US. Their factory is in Shantou, in the Guangdong province, on the eastern coast of China. It's a vertically integrated company that covers the complete production process: from product ideation to manufacturing, through to sales.

New Age Pet has distribution channels worldwide, with customers in Japan, Australia, New Zealand, the UK, Europe, Canada, Mexico, Costa Rica and the US.

#### PRODUCTS AND MATERIALS USED

The company started with a simple goal: to create durable, functional and ecofriendly pet products that complement consumers' home décor. To be able to live up to this aspiration, they developed a proprietary composite blend of new and recycled polymers, and reclaimed wood fiber byproducts. This composite blend combines the benefits of wood and plastic into one material: ECOFLEX®. Different than any other material available on the market, ECOFLEX is durable, longlasting and non-toxic. It is also resistant to rot, mold and insects. It doesn't expand and contract due to fluctuations

in temperature or humidity, as do many similar products.

ECOFLEX products are designed to be especially quick and easy to assemble, with most products having an assembly time of only 20-30 minutes. The material is paintable, which means pet parents can paint products to their heart's content to match their style and décor.

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# The increasing awareness of hearing loss in pets

**The early detection of deafness offers considerable benefits in terms of pet well-being. What are the latest developments related to testing and protecting animals' hearing?**

Although acquired deafness usually occurs later in life, any animal is susceptible to being affected by hearing loss. Experts admit that there are no real behavioral cues and it often goes undetected. Early detection and correct diagnosis of hearing issues can improve a pet's quality of life by ensuring they receive the right treatment.

## Behavioral assessment

Diagnosis of hearing loss in pets typically falls into one of the following categories: congenital, hereditary, acquired sensorineural and acquired conductive deafness. It is generally not possible to distinguish between hereditary and acquired deafness without breeding trials. However, according to research, the most common form of deafness in young dogs and cats is the so-called congenital hereditary sensorineural deafness (CHSD).

Currently, there are no DNA tests to detect this. Instead, an initial and very basic diagnosis is reached by exposing pets to familiar sounds and increasing the volume. The reality is that this type of behavioral assessment of an animal's hearing, either at a clinic or in the home, is of limited reliability.

## Current solution has a high price tag

Electrodiagnostic tests are necessary for an objective assessment, but these have a high price tag. The brainstem auditory evoked response (BAER) test is currently the only accepted method for diagnosing deafness in pets. First used in veterinary research in the 1970s and in clinical applications in the early 1980s, it detects electrical activity in the cochlea and auditory pathways in the animal's brain.

Depending on the options, BAER machines cost a minimum of \$15,000-\$25,000 (€14,000-€23,500), which puts them out of the price range of most veterinary practices. "Engineering could undoubtedly produce smaller and lower-cost devices, but it probably won't go far in that direction because of cost/benefit issues," admits Dr. George Strain, Professor of Neuroscience at Louisiana State University and an expert in the field of animal deafness.

## Toward easier detection

Dr. Strain is keen for new and less costly tests to be developed that could make it easier for vets to diagnose pets with hearing problems in their clinics.

[▶ SEE NEXT PAGE](#)

***The BAER test is currently the only accepted method for diagnosing deafness in pets.***

Therefore, he recently completed a study on a cheaper and more readily available tool, similar to a device that tests human babies' hearing based on so-called distortion product otoacoustic emissions (DPOAE). According to Dr. Strain, there is some scientific evidence suggesting that this technique could be applied to pets too. "However, although the preliminary studies demonstrate a successful outcome in simple cases with the new procedure, extensive testing will be required to clarify this," he admits.

For now, animals with equivocal or abnormal DPOAE results will still need to be referred for BAER testing, he explains: "Clinically, testing assesses whether hearing is present or absent. We don't quantify hearing loss when it is partial, and we are unable to test different frequencies. High and then middle frequencies are the ones lost first with acquired hearing loss, so the BAER test will not become obsolete anytime soon."

### Hearing protection devices

In the context of well-being, Dr. Strain is also a strong advocate of effective hearing protection devices for animals. As an example, he mentions that the US Army has issued a call for proposals to develop hearing protection devices for military dogs. The devices must be tolerated, permit passage of frequencies for speech and radio command transmission, and also protect the animals against loud noises, especially at high and low frequencies.

"Such devices would also be very useful for hunting dogs, who often lose hearing because gunfire near their head leads to progressive hearing loss," he admits in an interview with PETS International. With owners increasingly conscious of the well-being of their furry friends, this could be an interesting future development for the pet market too. ♦



**Sara Darling**  
PETS International Contributor

## Dog supplements catered to life stage or specific symptoms

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# Italy and France

As the industry gathers in Bologna for Zoomark, we dive into the Italian pet industry and sit down with the country's largest retailer. And what are the challenges and drivers of the French market? You're about to find out.

Country report: Italy  
The Italian pet retailer landscape in a nutshell  
Interview with Nicolò Galante, CEO at Arcaplanet

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Country report: France  
Zolux FRANCE

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# A holistic approach to pet care

**The many new pet parents in Italy want the best for their pets. Not only premium food, but also the best possible care, in all senses of the word. And that provides opportunities for innovative products.**

A constantly growing market. This, in a nutshell, is the conclusion of the 2022 report published by Zoomark and the Italian Association for Pet Feeding and Care on the pet market's performance in Italy.

Dog and cat food are the key players in Italy's pet food segment, with turnover doubling in the period 2007-2021: from €1.16 billion (\$1.24B) to €2.53 billion (\$2.71B). According to market research firm IRI, average annual growth in grocery and at specialized retailers (excluding online) during that time was 5.7%. Compared to 2020, 2021 turnover was up by 7.1% and volume by 5%.

### **Paying for well-being**

Most pet food growth is due to increases in premium and super premium purchases, driven by innovation and an increasing focus on welfare. This new attitude to pets is also confirmed by recent figures from RGS, the State General Accounting Department. Italian pet parents spent €693.16 million (\$743.22M) in veterinary clinics last year, while pharmaceutical expenditure went from €190 (\$204) to €240 (\$257) million in the last 2 years (+26%).

### **The vet as influencer**

Italian pet parents see vets as 'key influencers', a main source of information on their pet's diet. They also

consult them about topics not strictly related to health, such as grooming, accessories and toys.

This trend is pushing the extremely dynamic market for hygiene products, toys and accessories, which is performing excellently in large-scale retail (+5.8% compared to the previous period). The strongest segment is cat litter, which grew by 5% in the year ending December 2021.

### **Surge in pet ownership**

According to Euromonitor, there are an estimated 64 million pets in Italy. Dogs and cats total over 19 million – both on the rise. Statista shows that the dog population increased by 5% between 2020 and 2021 to 8.7 million.

The Italian pet market has proven to be a COVID-19 'winner'. Market growth in the last 2 years can partly be attributed to the rise in the number of people taking on dogs and cats that coincided with the end of the first lockdown in 2020.

More pet owners has led to a substantial rise in the number of households – most of them young people of medium-high socio-economic status – buying dog and cat food. According to a 2021 GFK

consumer panel, this is 12.2 million, 46.9% of all Italian households and up 3.4% on the previous year.

### Going phygital

The pet food market has seen profound changes in the weighting of the specialized channel and grocery, with annual growth rate increases of 8.3% and 4% respectively. Emerging channels include supermarkets, pet shops and also the online channel, which now accounts for 2.4% of the market.

Online grew during the pandemic, attracting and retaining new shoppers, while breaking down the many cultural and cognitive barriers that appeared to have held the channel back in previous years.

When it comes to purchasing habits, Italian pet parents seem to be going 'phygital': some checking product prices online and then buying in a store, while others look at products in a store and then buy online.

### Challenges and opportunities

How the rising prices of energy and raw materials, plus the rate of inflation, will impact on the Italian consumer is not yet clear. Some analysts forecast new market trends, like an increasing 'sensitivity' of Italian consumers to pricing and promotion, and decreasing brand loyalty. But Italian players are still optimistic, as the market is solid and in good health.

The growing importance of the relationship between pets and pet parents, a pet's role in the Italian family, and the focus on their well-being are key trends that will continue to shape the market.

New opportunities will also come from the digital world. Distribution channels can now further evolve to meet the needs of a new and increasingly aware consumer who will buy more – and more often – online. The key to the future will be omnichannel: a new way to reach new consumers. ♦



**Rita Buffagni**  
Communications Manager at Mediatic  
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# The Italian pet retailer landscape in a nutshell

**Supermarkets reign supreme in the offline channel, while competition between pet store chains is on the rise.**

The increase in the pet population in Italy in recent times is also impacting demand at the points of sale. It is believed that 12.2 million Italian households bought dog and cat food in 2021. That's 1 million more than the previous year, with the offline channel as the preferred place to purchase.

## Supermarkets own pet stores

According to the latest data from the Association for Pet Feeding and Care (ASSALCO), nearly 30% of the sales of dog and cat food in the country happen in supermarkets. After seeing the industry's potential, some of the big players launched their own pet store brands too.

Conad, the biggest supermarket chain in Italy launched PetStore Conad in 2016. In 2022 it opened 29 new locations, growing to 120 pet stores nationwide – and it expects to open another 20-25 stores in 2023. Sales in 2022 accounted for €90 million (\$98.1M), a yearly increase of 40%. PetStore Conad sells 11,000 items, from nutrition to grooming products and a wide range of accessories. It also offers pet care services, such as grooming and self-service pet cleaning.

The second biggest supermarket chain in the country, Selex, also has its own pet store brand. Going under the name of Animali Che Passione ('Animals What a Passion'), it offers between 7,000 and 8,000 items.

Marco Tombolesi, Petshop Category Manager for Gruppo Selex, said to PETS International that they had recently noticed a growth in the sale of dietetic products and plant-based litter.

## Most specialty stores in Europe

Italy is the country in Europe with the highest number of specialty pet stores – more than 5,900 in 2021, according to Statista. Around 14% of pet food purchases are done through this specialist channel.

The landscape changed slightly last year, when Arcaplanet and Maxi Zoo – part of the Fressnapf Group – announced the intention to combine their businesses. The merger resulted in the formation of the biggest pet retailer in Italy and the third in Europe.

The Italian antitrust authority, however, obliged both companies to sell between 50 and 70 shops to avoid having a "dominant position" in the market. Pet food manufacturer Cerere and retailer PDP bought 61 of those shops in northern Italy, and in 2022 they launched Petmark, a new player in the pet retailing market. ♦



**David Palacios Rubio**  
Head of Editorial  
GlobalPETS



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Nicolò Galante,  
CEO at Arcaplanet

**“We want  
to become  
the leading  
digital pet  
company in  
Italy”**

**Arcaplanet aims to grow to 1,000 stores within the next few years, which will work side by side with their growing online platform. We learn more about the ambitious strategy to make this possible.**

Things are going well for the third-biggest European pet retailer. The combination of businesses, and the integration of Maxi Zoo into Arcaplanet’s network last year, are expected to positively impact the company’s figures. It is expected to post sales of €600 million (\$637M) for 2022.

With all this, the Italian retailer is starting to think big. A new strategy will be rolled out in the coming months, with the objective of becoming more omnichannel and digital, and a plan to expand its footprint both nationally and internationally. Nicolò Galante, who recently celebrated his first year as CEO, tells Pets International how he sees the retailer’s future.

#### ***How’s the Italian pet market behaving?***

The number of pets in the country is increasing, as is the consumer’s willingness to invest in improving their pet’s quality of life, along with their own lives.

Despite the weak economic environment, Italian pet parents are continuing to spend money on their pets.

There is clearly a big opportunity for us to tap into the premium segment, as the pet consumer’s approach to healthcare is still extremely reactive. For example, pet parents in Italy only visit a vet when their pet is unwell and they don’t see why they need pet insurance.

#### ***Inflation is having an impact though ...***

Inflation in pet products in Italy was 12% in 2022, and we passed a significant chunk – a bit more than half – on to the customer. The rest we managed to absorb ourselves.

Many pet food brands have come to us in the last 12 months with price hikes, which we try to push back. But honestly, they have a point, because raw material costs have increased. Some of them went too far though, and I am starting to see signs that they [▶ SEE NEXT PAGE](#)

are beginning to bear the brunt of their decisions. Those that were too greedy and aggressive are starting to suffer the consequences, with consumers shifting to other more affordable options that offer the same quality.

#### *Is this a golden opportunity for private labels?*

If international brands continue with aggressive price increases, consumers will naturally shift toward private label products because price hikes in that category are about half.

Our private label offering is about 50% of our portfolio, but I deeply believe in a customer-centric approach and giving the customer what they need. If they are happy with an international brand, there's no reason to push them to move to a different one. There's so much more we can offer to our customers, rather than trying to switch them from a brand to a private label.

#### *But private label market share is increasing everywhere...*

Yes, and I think we will end up seeing a shift. What used to be a gap of 10% between third-party brands and private label producers has now become 20%.

#### *This summer we will start promoting our online assortment in-store as well.*

#### *Who is your average customer?*

Arcaplanet has 2 million loyal active customers, and this is growing very rapidly. Our average customer has a good income and has more than one pet, often a dog and one or more cats. Our customers care a lot about their pets, they are very open to new trends and they are concerned about the environment.

#### *Do they prefer offline or online purchases?*

Customers don't really care about the boundaries between offline and online. Within 3 weeks of launching our click-and-collect service in 2021, we had 30% of our online orders picked up from the store. And it remains at the same rate even today.

Our e-commerce sales were above €40 million (\$43M) in 2022, a 50% increase on the year before. And this year we expect this trend to continue. We want to show that it is possible for a physical retailer based in this country to be the number one in digital as well, and today everything points to the fact that we will get there in the next 5 years.



### That will be challenging...

Our online assortment is increasing every day, and this summer we will start promoting those products in-store as well, so customers can go to the store and place their online orders while they're there.

Today, we have an app that is a copy of our website. But by the end of the summer, we will launch our first real native mobile app, which will be the first pet retailer omnichannel app in Italy. The new app will allow the customer to not only purchase products on our e-commerce platform, but also use the discount coupons in-store. Our loyalty program will become digital – we will no longer distribute plastic cards.

### What's your strategy for new store openings?

As much as 90% of our stores are located in the center and north of the country, so we are looking to increase our footprint in the south. We recently opened 18 new stores in Sicily and we believe we could reach 200 more stores within the next 5 years in southern Italy.

We are also going to test a new model for stores in the city center: a 200 sqm location, very much oriented to

**Our e-commerce sales accounted for €40 million in 2022, a 50% increase on the year before.**

consultation and advice, promoting services, and with a collection point for online orders. We will be testing this new format in the second half of the year.

I believe that with 1,000 stores we would cover Italy pretty well; a target that we could reach in about 7 years. I think in the next 3 years we will reach 700.

### Is it time for Arcaplanet's international expansion?

In 2023, we need to prove that this omnichannel customer-centric model can create a lot of value in Italy. Once we achieve that, I believe we have a green light to look further into expanding to other countries where we can create real value and win. Especially countries that are geographically close to us. ♦



**David Palacios Rubio**  
Head of Editorial  
GlobalPETS

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# Competitiveness and sustainability, the future drivers of local players



With 80% of the pet food sold in France made in the country, the industry looks for ways to adapt to the current challenges and consumer demands.

France is one of the major pet food-producing markets in Europe. In 2021, the country's 39 pet food manufacturing sites nationwide produced more than 2 million metric tons (T), totaling a value of €3.9 billion (\$4.1B). Roughly half of the production is exported, with around two-thirds of that staying within the European Union.

Just over 500,000T of product were imported in 2021, mainly from Germany and the Netherlands.

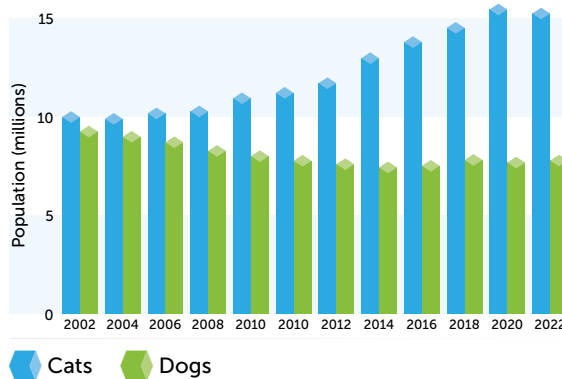
## Threats, challenges or opportunities?

Each year, French pet food manufacturers utilize more than 1.7 million metric tons of raw materials, nearly half of them produced in France. The pandemic, cases of drought as well as various epizootic crises (for example, avian influenza and African swine fever) have created strong tensions in supply chains and increases in the purchase prices of raw materials, packaging and transport.

Rather than being viewed as threats, these challenges can also be seen as presenting the market with an

opportunity to rethink its production methods and reduce its energy consumption, thus contributing to the decarbonization of the industry. Nevertheless, one of the biggest challenges for the industry is to raise awareness among politicians about the importance of finding the right balance between the production of food and the production of energy.

## Evolution of the number of dogs and cats



Source: Kantar-FACCO survey

[▶ SEE NEXT PAGE](#)

## The consumer market

There were an estimated 75 million pets in France in 2020, with fish topping the list at 26 million. This was followed by cats (15.1 million) and dogs (7.5 million). In that year, more than 1 in 2 households owned some kind of pet, with more than 1 in 3 households owning a cat and 1 in 5 owning a dog, according to a survey carried out among 14,000 respondents by FACCO (Fédération des fabricants d'aliments pour chiens, chats, oiseaux et autres animaux familiers). Over the past 20 years, the number of cats has increased by more than 65% in French households, while the canine population has slightly decreased and stabilized.

Bi-nutrition (giving both dry food and wet food) has become the norm for feeding cats. This mode of feeding has revitalized the popularity of wet food, which was in decline until 2014. According to the data, most pet parents feed their dogs and cats with dry kibble (94.6% and 97.5% respectively).

In terms of volumes, 653,000T of dog food (123,000T wet / 530,000T dry) and 600,000T of cat food (283,000T wet / 317,000T dry) were sold on the French market in 2021.

## Retail channels

7 out of 10 French consumers purchase cat food in supermarkets. Online and specialized stores are gaining ground to the detriment of supermarkets and 17% of consumers buy cat food through those channels. This is 8 and 9 points more respectively versus 2018. For dog food, 45% of consumers buy in supermarkets. This is declining in favor of specialized stores (32%) and e-commerce (20%).

Health and nutrition appear to be the top criteria when it comes to choosing a pet food. Two-thirds of owners find it important to choose a sustainable diet for their animal, and are particularly keen on products made in France. In terms of trends, grain-free products are already popular, and insect-based foods are on the rise.

## Pet health has improved

Over the past 5 years, the industry has been the subject of considerable scaremongering, particularly on social media, about the nutritional quality of pet

## *Half of the pet food produced in France is exported, mainly within the EU.*

food. Accusations include that various types of pet food contain too many carbohydrates, are a source of obesity, cause diabetes or cancer, and so on. According to the factual data, however, between 1996 and 2018 the average life expectancy of cats increased by almost 4 years, from 8 years to 11.9 years. The average life expectancy of dogs increased by approximately 1 year (from 11.8 years to 12.7 years) over the same period.

Similarly, in 2020, FACCO financially supported epidemiological research into overweight and obese pets by the veterinary schools of Maison-Alfort and Toulouse. The study, which involved 309 dogs and 322 cats, found 3% of dogs and 3% of cats to be obese. These percentages have decreased compared to previous data from 2006 (5% of dogs were obese) and 2008 (7.8% of cats were obese).

## Environmental concerns

For several years, FACCO members have been taking action to reduce the industry's environmental footprint. One of the first factors identified was packaging, and various initiatives have been aimed at recycling, reusing and reducing the quantities of plastic used. FACCO is also working on a strategic roadmap for the entire profession to achieve the objectives set by the French government.

The next step will be to develop a roadmap for the decarbonization of the French pet food sector. Some FACCO members have already committed to achieving carbon neutrality, and there are also sectoral rules at the European level for manufacturers to quantify the environmental impact of a product based on lifecycle analysis. So consumers will soon be able to choose their preferred pet food based on the product's environmental impact. ♦



**Christophe Cartier**  
President  
FACCO



# Environmental and social responsibility

## French pet care leader Zolux made its ambitious environmental and social responsibility goals a priority for many years.

Zolux introduced numerous initiatives to reach these goals, through its dedicated 'Horizon' program. The program includes:

- Reducing the environmental impact of all new products.
- Setting up a responsible purchasing policy and a supplier code of conduct outlining requirements in terms of working conditions, quality, animal welfare and a smaller environmental footprint. This has already been signed by more than 80% of the group's suppliers, service providers and its own factories.
- Involving its veterinarian team in all food, hygiene and care product developments.
- Co-creating products with La Tribu, a community of more than 2,500 pet parents, in consultation with product managers and veterinarians.
- Engaging in corporate philanthropy. More than 300 of the company's products carry animal welfare association YouCare's label *1% Pour Les Animaux* ('1% For Animals').
- Guaranteeing a high-quality work environment for the group's 420 employees, 91% of whom say they are proud to work for Zolux.

### Purpose-driven company

At the end of 2022, in line with its social responsibility approach, the group adopted the 'purpose-driven company' status introduced by the French PACTE law on business growth and transformation. This status makes it mandatory for the company to commit resources to pursue its mission and reach its goals in terms of social, societal and environmental impact. Zolux management's compliance with the mission is monitored and verified by a Mission Committee comprising internal and external members.

### New warehouse

Having only recently inaugurated a new 12,500 sqm warehouse in northern France, Zolux has already started renovating a 10,000 sqm building in Saintes to house its headquarters. In addition to a spacious and modern 4,000 sqm office, the renovated building will also incorporate a 3,500 sqm logistics warehouse for Laboratoire Francodex, the Zolux company specializing in animal health. Lastly, 2,500 sqm will be dedicated to a new industrial facility composed of a laboratory and a factory for

animal health and hygiene products. Zolux's ongoing investments in its own production facilities illustrate its commitment to manufacturing in Europe whenever possible.

For growth, the group is currently focused on international markets. For example, Zolux is pursuing a European expansion strategy with Zolux Iberia. This new subsidiary has been created from the merger of Zolux and Pisciber Bio Secure Fishes, a Spanish company specializing in the import and distribution of ornamental fish and other aquatic animals. Based in Abrera, near Barcelona, Zolux Iberia has a team of 6 sales representatives and a 3,600 sqm logistics warehouse for delivering products to Spain and Portugal. ♦

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