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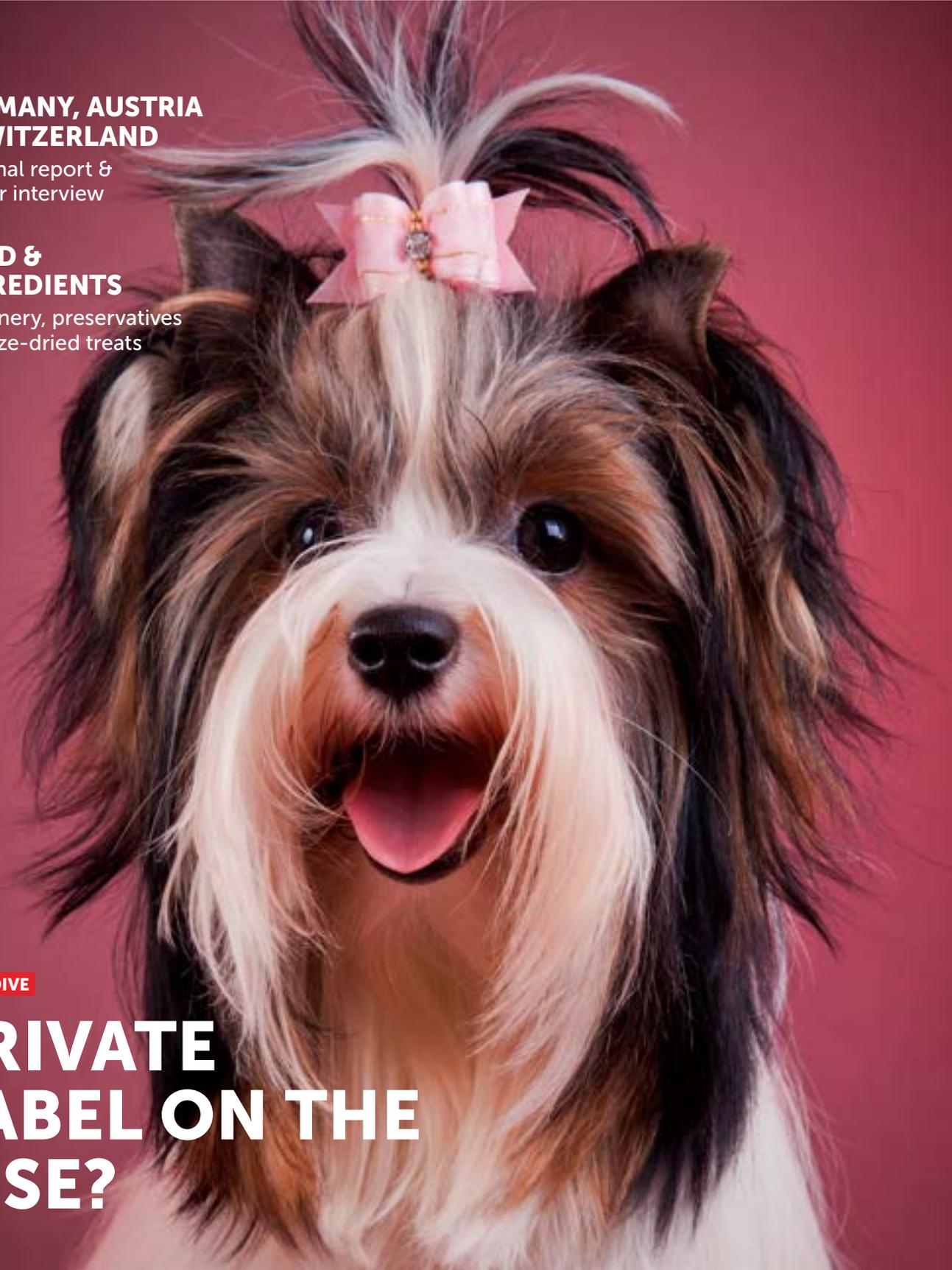
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Food and ingredients

Why does private label perform better in Europe than in the US? We also look at the trend of freeze-dried treats and developments in pet food manufacturing equipment. Additionally, you'll discover a research update on additives like copper and zinc, as well as preservatives.



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Global pet industry

How's the 'hot' category of CBD for pets doing? What are the latest trends in beds and cushions? How important is social media for pet brands? Can a lower VAT rate help combat rising prices? Find all the answers. Plus, more details on the GlobalPETS Forum and supermarkets entering the pet space.



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Germany, Austria and Switzerland

How is the pet industry doing in the DACH region? We present some facts and figures and a more detailed analysis of online sales in Germany. We also sit down with the largest European pet retailer, Fressnapf, for an interview.



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Is the pressure now on?

In the current inflationary environment, price is becoming an increasingly important factor for consumers. So what we all want to know is how pet owners will respond in the near future.

How will purchasing behavior change? Are private label products likely to become more popular? And how does their popularity differ in Europe and the US? There's also considerable debate on the impact of lowering VAT for pet food products to help alleviate the financial burden for consumers.

While there is some pushback around CBD in various countries, it is a segment that is definitely picking up steam. So you'll find a market overview that makes interesting reading. And we've partnered with Yummypets to ask consumers how they feel about using CBD – and whether they've yet tried it for their pets.

On the pet food front, freeze-dried is all the rage. This time, we take a good look at the data around freeze-dried treats. We also analyze how pet food machinery needs to evolve to meet changing consumer demands. And you'll learn more about the preservatives used in food for pets.

In this issue's regional deep dive, we look at one of Europe's largest markets: the DACH region. How is the pet industry doing in Germany (D), Austria (A) and Switzerland (CH)? There's an update on Germany's online landscape. And we sat down with Europe's largest pet retailer, Fressnapf.

Finally, we are unveiling more details of our upcoming GlobalPETS Forum in Venice. You'll discover what the event is all about – its theme, the format, some of the keynote speakers, and the nominees for the GlobalPETS Forum award. Tickets are selling fast, so I hope to see you there!

Happy reading,



Philippe Vanderhoydonck
Managing Director

P.S. If you don't receive our newsletters yet, go to globalpetindustry.com and sign up to keep a finger on the pulse of the industry.



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3 out of 10 UK dog owners don't know what they're feeding their pets



A recent survey commissioned by UK-based fresh dog food brand Butternut Box found that almost half of surveyed dog owners (48%) could only identify up to 3 ingredients in their pet food. And 3 in 10 did not know what they were feeding their pets.

A sizeable 36% of dog parents were worried that their pet wasn't receiving proper nutrition, while almost a quarter (23%) found it hard to understand the listed ingredients.

4 out of 10 respondents admitted to finding their pet's diet more stressful than their own, and 41% wanted clearer labeling. 44% felt confused by contradicting advice on what makes a dog's diet healthy.

Latest round of investments

Private equity firm L Catterton continues its venture into the pet industry with a strategic investment in Withmal, one of Japan's largest veterinary services groups. This puts the veterinary group in a good financial position to accelerate its domestic expansion, while building on its service quality and relationships with pet parents.

Investment firm Jebsen Group has recently acquired Hong Kong online retailer Vetopia. The group emphasizes that the deal aligns with its ambition to continue its investment "in the thriving pet care and retail industry" in Greater China.

London-based fresh dog food company Butternut Box has raised £280 million (\$351M / €327M), led by its new private equity investor General Atlantic, and existing investor L Catterton. The company plans on using the investment to expand its brand presence in Europe, including a new manufacturing facility.



In the US, Kansas City-based pet insurance and animal wellness company Companion Protect closed an investment of \$27 million (€24.9M) in a Series A round. The company said that the investment will help on its journey to "disrupt the pet health space and bring pet healthcare to the masses".

Veterinary software company Otto closed a \$43 million (€39.65M) Series B funding round with existing investors Mercury Fund and Boehringer Ingelheim. Hill's Pet Nutrition joined as a new investor in the start-up, which is based in Austin, Texas.

Los Angeles DTC firm Jinx has raised \$17.85 million (€15.9M) in Series B funding. The company believes that this new capital injection underscores Jinx's capacity to thrive in challenging environmental and economic conditions.

US pet supplements company Native Pet has secured \$11 million (€10M) in a Series B round of funding to accelerate its growth through category innovations and retail expansion. Native Pet products are sold on the company's website, as well as through Amazon, Chewy, Thrive Market, CVS and Target.

German pet supplement company Mammaly has raised €14 million (\$14.9M) in a Series A round. At present, Mammaly sells its supplements through German retailer Fressnapf, but it wants to scale up its presence in the retail channel after the capital injection.

Fressnapf opens new logistic warehouse

Fressnapf's new 47,500 sqm facility, located close to Berlin, will supply products to more than 400 stores across Northern and Eastern Germany, Poland and Scandinavia.

Christian Buschmann, Vice President of Logistics, Engineering and Real Estate for the Fressnapf Group, says the company is "pleased to now move into the property and put it into operation quickly". It is believed that the new warehouse will create 150 new jobs.



HelloFresh enters the pet food industry

Berlin-headquartered meal kit company HelloFresh has launched a private label personalized pet food service in the US called The Pets Table. This marks an expansion of its home delivery portfolio into subscription-based premium pet food.

For now, the service will be available in all US states, excluding Alaska and Hawaii, to target the rapidly growing premium dog food market.

The new private-label pet food brand currently offers 4 plans – fresh, air-dried, mixed, and half of fresh – and the company looks forward to developing a premium range of treats.



Yes, Alpha has been acquired!

The rumors circulating about a potential sale of US pet food manufacturer Alpha turned out to be true. Private equity firm PAI Partners has agreed to acquire Alpha from its owner J.H. Whitney. The terms of the deal have not been disclosed, but previous reports suggested that the company was looking to sell its business for \$1 billion (€920M).

Alpha manufactures over 1 billion pounds of dry pet food and treats yearly. The Denver-based company has 6 facilities in the US.

Canadian pet retailers to expand distribution capabilities

Legault Group is setting up a new 400,000 sqf automated warehouse and distribution center in Quebec to supply products to Mondou stores and to fulfill online demand. The plant will cost over CAN\$90 million (\$66.6M / €62.4M) and is expected to be operational by 2025.

Pet Valu also announced the opening of a new distribution center. The 670,000 sqf premises are located in Brampton, Ontario, and will bring "unprecedented" scale and automation to Canada's pet sector. When in operation, it will be the largest distribution center and robotic automation installation dedicated to serving the pet specialty industry in Canada. The company expects that the new plant will have the capacity to process all orders the same day, while improving productivity by more than 50%.





Dehner gets into top of Bavaria's best dealers list

Garden and pet retailer Dehner has been ranked 20th out of 371 firms in Bavaria, Germany's largest state, in the SZ Institute Best Dealers list. Dehner is one of the leading groups of garden centers in Germany and Austria, with around 130 stores.

The ranking system allowed customers to decide which outlet they thought was the best, and Dehner had an average score of 2.35. The study collected over 33,000 responses, and participants rated the best retailers based on their personal experiences and expectations.

South Korea's plan to expand the local pet industry

South Korea has announced its latest plans to expand the East Asian country's pet industry to ₩15 trillion (\$11.4B / €10.3B) in 3 years' time.

In a statement, the Ministry of Agriculture, Food and Rural Affairs said that the plans seek to "address evolving market trends, such as pet humanization". Korean officials valued the local pet industry at ₩8 trillion (\$6B / €5.5B) in 2022.

According to a survey, South Korea's annual expenditure on pets reached an average of ₩353,000 (\$269 / €244) per person in 2022.



How prices of US canned pet food could increase by up to 30%

A proposal to increase the tax applied to imported tinsplate steel by up to 300% is under consideration at the International Trade Commission and the US Department of Commerce. If adopted, it is expected to have a noticeable impact.

The Pet Food Institute warns that imposing these additional tariffs on consumer goods will increase the production costs of canned cat and dog food.

The Consumer Brands Association (CBA) has stated that if the tariffs go into effect, companies will be forced to raise food prices. It is estimated that the cost of canned food and products could increase between 19% and 30% if the new tariff receives the green light from US officials.

According to CBA, the additional cost would be mainly transferred to the end consumer. The increase per can across all food categories could be between \$0.36 and \$0.58 (€0.33–0.53). So the tariffs could considerably impact the wet cat food segment, as this accounts for the largest percentage of sales after dry food, representing 45%.



PET INDUSTRY HIGHLIGHTS



German medical firm SYNLAB sells vet business to Mars

SYNLAB Vet will join the Mars Petcare portfolio and become integrated into the services provided across veterinary health and diagnostics, nutrition, innovation and technology. The move also allows Mars' Science & Diagnostics division to expand its European footprint.

SYNLAB, which did not reveal the value of the deal, has allegedly decided to sell the business to Mars to refocus on its core human diagnostics operations. According to some sources, the firm's veterinary diagnostics unit generated only 1% of the group's €3.2 billion (\$3.4B) revenue in 2022. SYNLAB operates across 40 countries.

Purina launches new Eastern European division

A new division within Purina Petcare Europe will cover Central and Eastern Europe as well as Southeastern Europe.

Jean Grunenwald, who has been operating as Regional Business Head of Nestlé Purina PetCare in Asia, Oceania and Africa for the past 4 years, is leading the new division.



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Chewy's expansion into Canada: an easy conquest?

Some months ago, US online retailer Chewy made a huge announcement – saying it plans to expand operations into neighboring Canada this year.

Toronto-based e-commerce expert Ran Ravitz believes that – unlike other US companies like Target and Nordstrom that have tried and failed to enter the market – the expansion of Chewy into Canada sounds like a “more simple conquest”.

Ravitz, the founder of e-commerce agency Ecommerce Pathways, adds that Amazon dominates Canada’s e-commerce market and believes it will stay like this after Chewy’s arrival.

However, he predicts that the presence of the US online pet retailer will initially take market share from traditional retailers. “It will challenge and eat away at their e-commerce sales,” he comments.

Online competition is expected to intensify as soon as Chewy enters the country, with its competitors aiming to retain as much market share as possible. Some well-established players will promote their e-commerce stores more widely, and leverage omnichannel strategies to capture more customers.

It is believed that 23% of Canada’s pet spending is online, while this represents around 34% in the US. That presents a favorable opportunity for Chewy to enter the market as a new player, but it will need to adapt to a new reality.

Study shows vegan cats are healthier than meat-fed ones

Findings from a new study from the University of Winchester (UK) suggest that cats are not “obligate carnivores”, as has been previously claimed, and indicate better health and lower vet visits among cats fed a vegan diet.

The research among 1,300 cats concluded that vegan cats made 7.3% fewer visits to the vet at an unusual frequency, suggesting less need for emergency treatment.

Vegan cats also had a 14.9% reduction in medication use and were 54.7% less likely to progress onto therapeutic diets.

There was almost a 4% reduction in the veterinary assessment of cats being unwell, and a drop of 8% in cats displaying severe sickness. Owners’ opinions of their cats being unwell were also 23% lower.



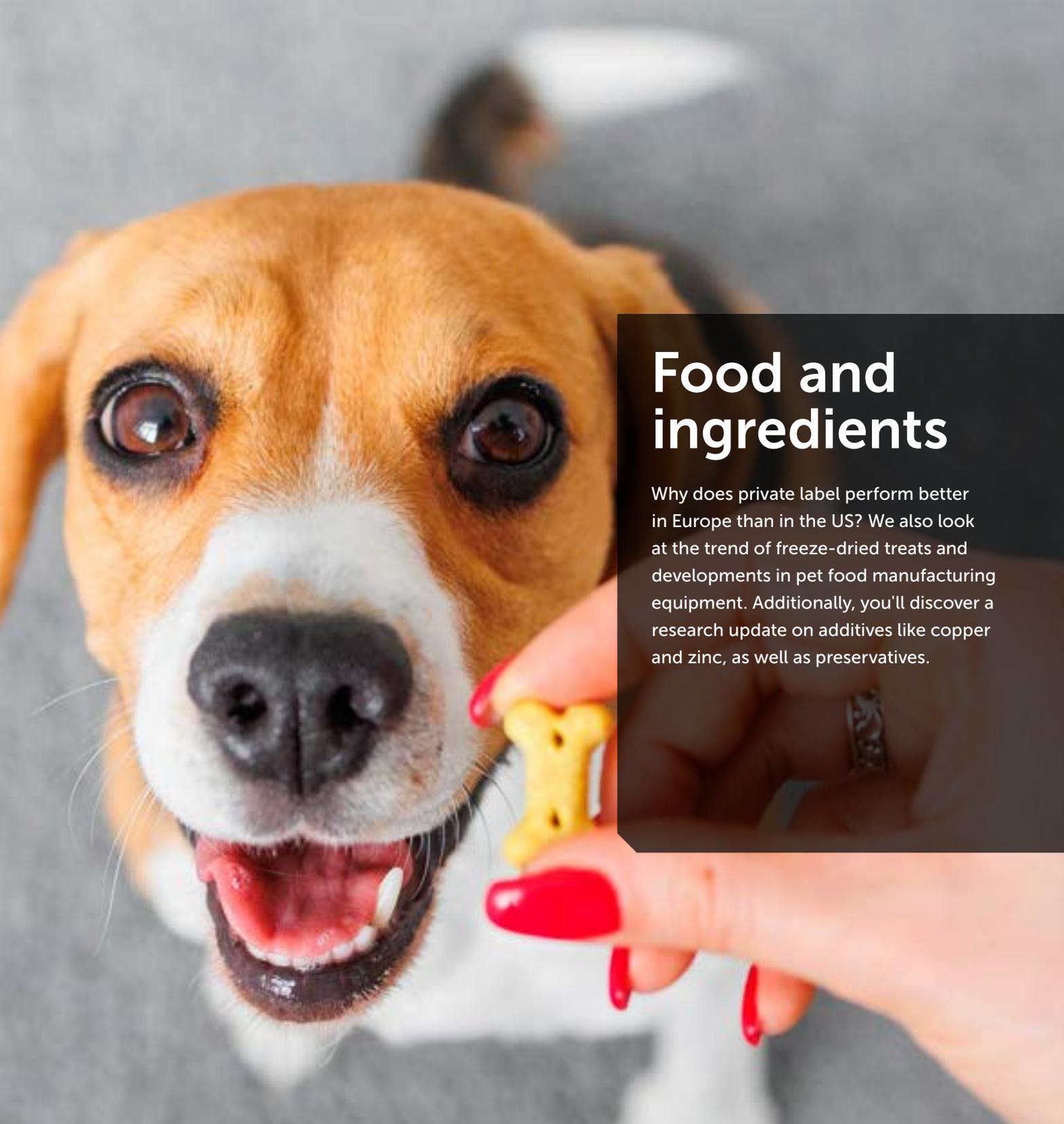
Pets Corner: expanding their wings in Europe and the US



Under its Pet Family parent company, Pets Corner has been recently expanding across Europe and the US. The firm currently operates 150 locations in the UK.

One of the latest developments was the purchase of 30% of the retailer Cats and Dogs. The Belgian retailer, that currently has 7 stores in the Antwerp region, will keep its own identity and operate independently. Pets Corner hopes to open 20 stores in Belgium over the next 5 years with the new partnership.

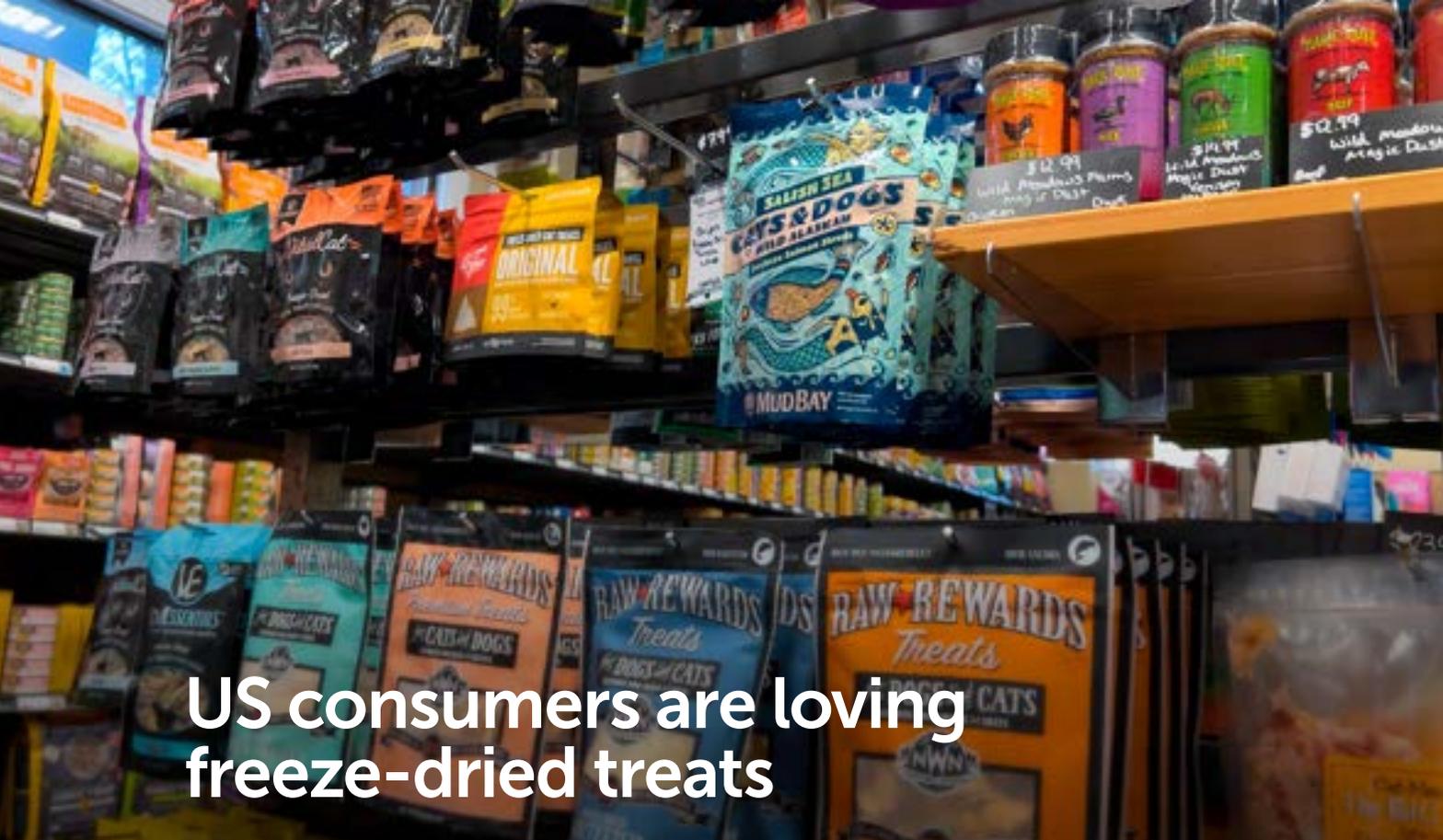
The UK retailer has also reached an agreement with US pet retailer Kriser’s Natural Pet to expand its footprint in North America, a market where it already sells its products to independent stores. The first opening will be in Raleigh, North Carolina, and that state will remain the focus for the coming years.



Food and ingredients

Why does private label perform better in Europe than in the US? We also look at the trend of freeze-dried treats and developments in pet food manufacturing equipment. Additionally, you'll discover a research update on additives like copper and zinc, as well as preservatives.

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US consumers are loving freeze-dried treats

Freeze-dried and air-dried pet food options have grown in popularity in the US pet food space, and the trend has crossed over into the treats market as well.

While many marketers of frozen raw food have already been offering freeze-dried treat options, traditional treat and kibble manufacturers are now entering the category too. This is a sure indication of the potential of these products.

Potential to meet today's demand

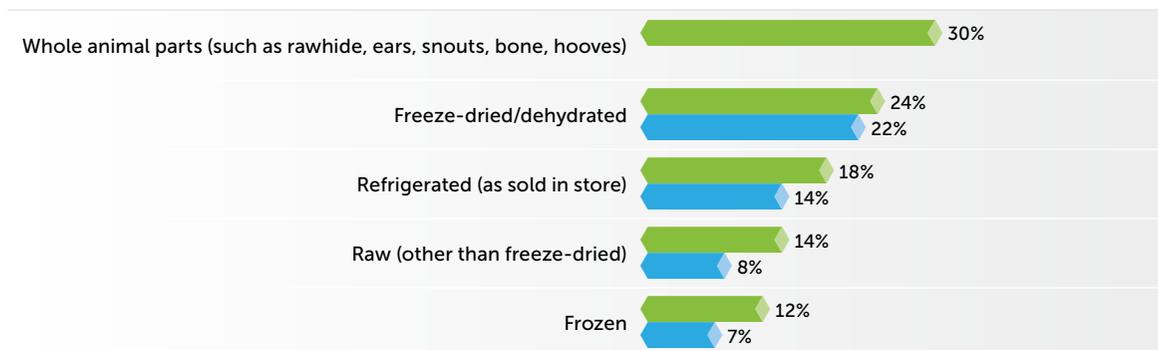
Freeze-dried and air-dried (or dehydrated) treats are popular because they offer some of the same

nutritional benefits of raw products, in a cleaner, significantly more convenient format. The treats don't require refrigeration and avoid the mess frequently associated with raw products.

Marketers offering freeze-dried options are tapping into a range of treats market trends, such as single and limited ingredients, weight management, and health and wellness in general.

Purchase rates for treats and chews by specialty formulation

(past 12 months, % of dog and cat treats/chews purchasers)



Source: Packaged Facts May 2023 Survey of Pet Owners

◆ Dogs ◆ Cats

Because freeze-dried treats tend to feature simpler ingredients, they are also part of the humanization trend, offering owners a treat product with recognizable ingredients and a finished product that more closely resembles human food. These treats also address pet owners' demand for 'clean labels' and ingredient transparency.

Purchasing to sample

Data from the Packaged Facts May 2023 Survey of Pet Owners shows that – by specialty formulation – freeze-dried/dehydrated treats were second in popularity only to treats/chews made from whole animal parts such as rawhide. Some 24% of dog owners and 22% of cat owners who had purchased treats in the US in the past 12 months purchased freeze-dried products.

This purchase rate is somewhat higher than that for pet foods in the same category, with Packaged Facts survey data from February 2023 showing that 12% of dog and cat owners had purchased freeze-dried pet foods in the past 12 months.

The difference in purchase rates is probably due to pet owners being much more likely to purchase treats to sample than to make a major change to their pet's food. Additionally, a small bag of treats is less of a commitment than a large bag of pet food.

More varieties on offer

Illustrating the popularity of freeze-dried treats, Global Pet Expo 2023 featured several new product introductions from the likes of Made by Nacho, A Better Treat, and Montana Dog Food Co.

A number of other companies are active in the freeze-dried and air-dried treats category. One of these is West Paw, which markets several freeze-dried treats, including its superfood-based duck variety. Another is K9 Bros with "gently dried" treats in salmon, chicken and beef as well as fruit-based and vegetable-based varieties. And PureBites has a wide range of freeze-dried and air-dried treats.

One of the top raw food players in the pet treats and chews market is Vital Essentials, offering several varieties of packaged raw freeze-dried treats. These

Freeze-dried treats also address pet owners' demand for 'clean labels' and ingredient transparency.

range from beef liver nibs to bully sticks. The company also sells VE RAW BAR selections of freeze-dried animal parts – individually and in bulk containers. Pet retailers are getting involved as well, with both Petco (WholeHearted) and Chewy (Tylee's and American Journey) offering private-label freeze-dried treat options.

The future

Because freeze-dried, air-dried and dehydrated pet treats align with so many overarching pet market trends, demand for these products is definitely expected to grow.

Pet owners appreciate how the treats feature minimal processing and recognizable ingredients in a convenient format, allowing them to enjoy guilt-free bonding time with their pets.

Latest investments

Underscoring the positive outlook for freeze-dried treat products are the number of recent mergers and acquisitions, as well as investments that involve market participants.

Last October, BrightPet Nutrition Group acquired Bravo Pet Foods, which manufactures frozen raw and freeze-dried pet foods and treats. And in September 2022, Ziwi Ltd, a premium pet food exporter and maker of air-dried food and treats in New Zealand – that also does a lot of business in the US – acquired Freeze Dried Foods, another New Zealand company.

One of the biggest acquisitions in this space, in February 2023, was pet market giant Mars Petcare's acquisition of Canada-based Champion Petfoods and its Orijen and Acana pet food brands, both of which offer freeze-dried treat products. ♦



Shannon Brown
Pet Brand Manager
Packaged Facts

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A European approach to pet-food private labels



The private-label pet food category is performing better in Europe than in the US. What are the reasons behind this difference?

Private labels in the European pet food market have seen a notable year, crossing the \$6 billion (€5.5B) mark and regaining ground in terms of market share.

A well-established category

With a significant share of the market (55% in volume and 34% in value), private label is a well-established category within the fast-moving consumer goods (FMCG) sector in Europe. The market share in North America is considerably lower in comparison (38% in volume and 17% in value).

There are a few reasons to explain this difference:

- European retailers have been more aggressive than their US counterparts in promoting their private label brands
- European consumers are more willing to try new products and have less brand loyalty than American consumers
- European retailers have succeeded in building a

more premium image for their private label brands, which has helped them to differentiate themselves from manufacturers' brands

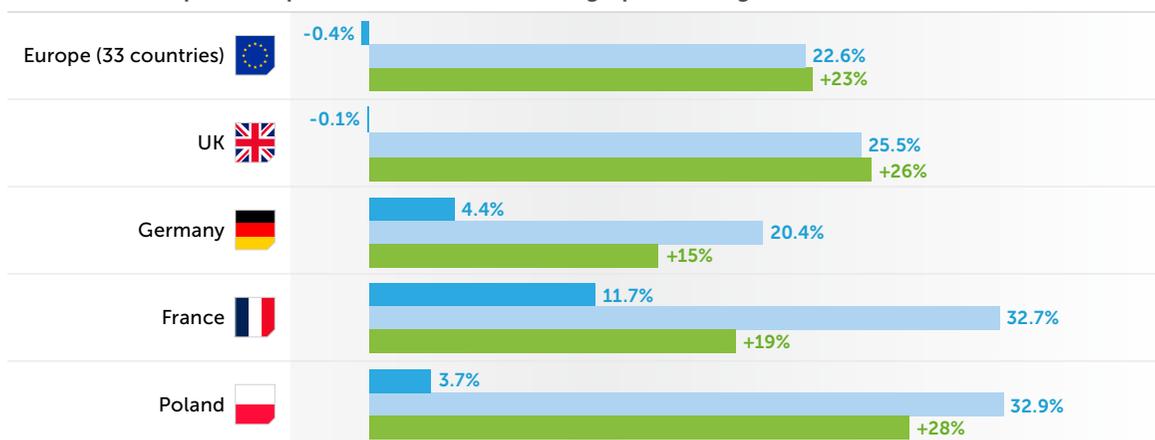
- European retailers tend to work in a more centralized manner than US retailers. This gives them greater control over their supply chains, which makes it easier for them to develop and promote their own private label brands.

Evolution of pet-food private labels

The dominance of the private label category is slightly less pronounced in the European pet food segment, with a 47% volume share and a 31% value share. The comparatively lower prevalence of private labels in pet food has historically been attributed to consumer preferences. When it comes to caring for others, consumers tend to focus more strongly on quality and therefore choose manufacturers' brands over private labels. This trend can be seen in segments such as baby care as well as pet care.

[▶ SEE NEXT PAGE](#)

Performance of pet-food private labels (volume change/price change vs. 2022)



Source: NielsenIQ strategic planner, 52 weeks to 16 July 2023 ■ % Volume change ■ % Value change ■ % Price increase vs. last year

Over the last few years, more sophisticated and premium ranges of private-label pet food products have been developed. However, these have struggled to secure a foothold in the market dominated by manufacturers' brands, with both the volume share and value share declining by around 1 percentage point.

Nevertheless, there are signs of a shift driven by the recent increase in inflation rates and the erosion of consumer spending power. The purchase of private label products has now become a primary strategy for people looking to manage their household expenses. This is having a positive impact on the share of the private label category, both in the broader FMCG sector and within the pet food segment.

Cost-of-living crisis

Another coping behavior to navigate the cost-of-living crisis is the increased willingness of consumers to shop at discounter stores. This is also benefiting the private label category, since the share of private labels is bigger in the discounter channel.

This increased interest in private label has not yet triggered substantial volume growth in the European region. Nevertheless, the category has shown resilience amid the ongoing volume decline affecting both the FMCG and pet food sectors. Private labels have not been entirely immune to this downward trend, but their overall decline has been less steep compared to manufacturers' brands (year-on-year volume change of -0.4% versus -2.5%), resulting in an increased market share by volume (rising from 46.4% to 47.3%).

Countries to watch

Pet-food private labels have achieved volume growth in a number of European countries, specifically France (11.7%), Germany (4.4%) and Poland (3.7%). These growth figures are accompanied by notable increases in volume shares, with Poland witnessing a 5.1% increase, while Germany and France each saw a 4% increase. These gains surpass those achieved by private labels in the broader FMCG category.

Interestingly, the United Kingdom deviates from this trend, with the nation experiencing relatively stagnant volume growth. This can be attributed to a significant reduction in the product assortment, which happened to a lesser extent in the other 3 major countries.

Slightly less price-competitive

The prices of pet-food private label products have been raised a little more aggressively than branded products: by 23%, compared to 19% for manufacturers' brands. This equates to a 1.3 percentage points increase in the value share, from 29.6% to 30.9%.

As a result, private labels in the European region have experienced a slight reduction in their price competitiveness. Based on the price index for the pet food category, private labels are 34.1% cheaper than the category baseline in 2023, whereas they were 35.9% cheaper last year.

Upon closer examination of this trend, the United Kingdom stands out once again, with relative prices rising by 3.9 percentage points this year.

Conversely, the index shows that the price competitiveness of pet-food private labels in the other 3 major countries has improved slightly. For instance, in Germany, where the relative price difference is the smallest at around 25%, private labels became 0.5 percentage points cheaper than the baseline this year. For comparative purposes, the relative price difference in North America has remained steady at 26%.

What will the future bring?

So the next big question is: Will private labels in the pet food sector continue to do well in the future? The answer seems to be yes, for 2 main reasons.

First, pressure on people's wallets will persist for the foreseeable future. This will encourage them to stick with their money-saving strategies, which often involve choosing private labels. Secondly, as more shoppers trial the category, the acceptance is likely to increase further. 35% of consumers already say that some store-brand products are just as good as – or even better than – manufacturers' brands.

Given the likely sustained interest and growth in private labels, it is key for branded manufacturers to pursue strategies that will enable them to either maintain or grow their market share. Obvious strategies include offering their own value-for-money products, implementing effective pack/price architecture or having a portfolio of brands that can play in different price tiers.

Besides these strategies, some manufacturers have successfully managed to offer points of differentiation or added perceived benefits versus private label products. Examples include initiatives related to sustainably sourced ingredients or recyclable packaging. These are areas that the majority of mainstream retailers are unlikely to pursue with their private label ranges in the short term. ♦



Gaelle Ballarin
Global Insight Lead
NielsenIQ



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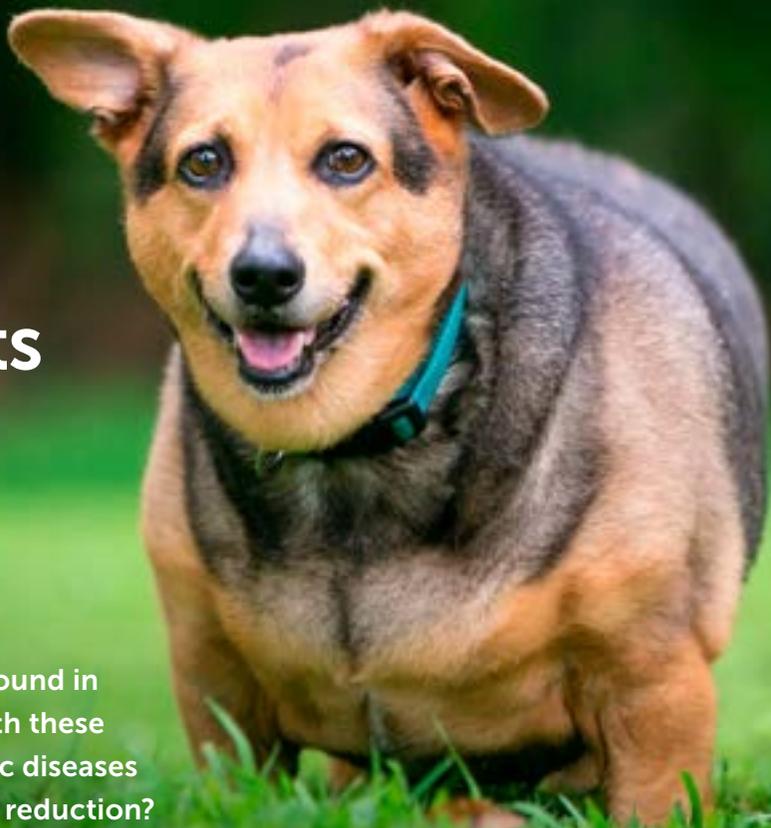


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Dietary AGEs and their impact on pets



Compounds known as AGEs are found in varying amounts in pet foods. With these substances linked to some chronic diseases in people, should the focus be on reduction?

Advanced Glycation End Products, or AGEs, are compounds made when proteins or lipids are exposed to sugar. They become attached via a covalent bond, or 'glycated'. There are many pathways for the development of AGEs. They can form *in situ* over days to months, or can be taken in via dietary sources.

AGEs in food

Dietary AGE formation tends to happen during cooking at high temperatures, with levels often higher in animal-based foods. However, this is not a simple formula, as decreased cooking times, the presence of acidic ingredients and inhibitor compounds can decrease AGE formation. Moisture is necessary for some reactions, but conversely, higher levels can be inhibitory.

Dietary retention is similarly complicated. Studies have shown varying levels of absorption and excretion, and factors such as the influence of ingredients, compound weight, anti-AGE factors, and interactions with other nutrients such as fiber are not yet thoroughly understood.

Compared against a human diet, the impact of a single food's AGE content is multiplied in our pets who tend to eat the same food day-to-day. The average canine daily

intake of certain AGEs on a metabolic body weight basis has been estimated to be over 100-fold that of humans, according to the estimations of a study.

What is the concern?

AGE compounds can impart flavors and colors to food. However, they have been implicated in chronic diseases in people, especially inflammatory and oxidative processes, such as in cardiovascular disease, diabetes and Alzheimer's. The reactions can also reduce bioavailability of the original nutrient – a notable example is lysine, an essential amino acid. In addition, there is concern that these newly formed compounds can serve as a source of unexpected allergens. The potential ill-effects in pets are less well known, but the same concerns are also extrapolated to pet food.

Next steps: improving knowledge and reducing dietary levels

There are still many unanswered questions regarding AGE levels in pet foods. Filling these knowledge gaps may be simpler than addressing the overarching question: How do AGEs impact pet health? In vivo, the ability to study AGEs suffers from the same limitation as studying any single nutritional factor: the difficulty in assessing and controlling for all potentially

confounding factors. However, it has been theorized that increased life span in mice with caloric restriction was related to reduced AGE consumption.

Although endogenous production remains a significant source of AGEs, reducing the dietary component is associated with lowered overall levels. As pet food production methods vary greatly in ways known to affect AGE production, such as temperature and time, it is logical to consider how this may affect levels in pet foods. While AGE content of individual ingredients has been examined, studies looking at AGEs in pet food have only begun relatively recently, with few studies comparing different types of pet foods.

More information needed

In one study from the University of Georgia, AGE levels were highest in a wet food, followed by an air-dried food, kibble and a gently cooked/raw diet. However, the wet diet was the only diet found to be statistically different. AGE type also varies between categories of pet food. For example, certain AGEs may be higher in kibble than wet and vice versa. Overall, higher AGE content in wet diets over extruded has been a relatively

consistent finding, however, further studies are needed. In personal communications with a variety of pet food manufacturers, few companies reported testing for AGEs, and testing methods vary. In addition, examining AGE content on a caloric basis is needed to accurately estimate a pet's overall intake.

Further information regarding AGE formation and absorption, their role in disease, and the best ways to reduce dietary contribution as well as overall body stores in our pets is needed in order to best guide pet diets.

As many pets suffer from obesity and overfeeding, ensuring pets are fed an appropriate amount would be a simple first step to reducing the AGE burden. Additionally, in the pursuit of healthier diets for our pets, considerations such as food safety, nutrient bioavailability, shelf stability, and patient-specific nutritional needs should not be overlooked. ♦



Emily Luisana
Veterinary Nutritionist and Industry Consultant



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Search for sustainable fish-oil alternative leads to microalgae

When looking to increase the world's access to beneficial omega-3 fatty acids for cats and dogs, Veramaris found the solution in a potent natural source: microalgae. The resulting algal oil supports pet food manufacturers' innovation and sourcing activities.

Scientists agree that omega-3 fatty acids – and in particular EPA and DHA – offer proven metabolic and health benefits for dogs and cats. However, dogs can only generate limited amounts of EPA and DHA, and neither can be generated in cats. Therefore, dietary supplementation is recommended to ensure the pet's baseline nutritional requirements are being met.

The challenge

Traditionally, fish oil and fishmeal from wild fish stocks have been the sole source of these essential fatty acids. "But the biggest roadblock with fish oil is that there simply isn't enough of it," says Gertjan de Koning, CEO of Veramaris®. "It's virtually impossible to source enough fish from oceans without unacceptable overfishing. The animal nutrition industry is in dire need of sustainable fish-oil alternatives."

Veramaris therefore embarked on a challenge: to sustainably increase the world's access to EPA and DHA. To achieve this, scientists turned to one of the most potent sources of these long-chain omega-3 fatty acids: microalgae.

Research

More than 35 years of research resulted in a unique algal oil that is both safe and sustainable. Veramaris Pets Algal Oil provides staggering amounts of EPA and DHA, allowing the animal nutrition industry to become independent of marine resources. Additionally, the

algal oil is rich in arachidonic acid (ARA) – an essential omega-6 fatty acid for cats – making it one of the few rich vegetarian sources of ARA.

Quality assurance

The production process of Veramaris Pets Algal Oil is relatively simple, presenting few critical control points and allowing for superior quality and food safety standards. A closed-vessel fermentation process ensures that the algal oil is free from ocean-borne contaminants such as heavy metals, dioxins and polychlorinated biphenyls (PCBs). The fully controlled process also allows for minimal variation in the levels of EPA and DHA, giving pet food manufacturers the opportunity to confidently claim these omega-3 fatty acids in their products.

"The regenerative nature of the algal oil brings supply assurance to a volatile market, meeting the needs of a global market hungry for fish-oil alternatives," states George B. Josef, Global Head of Business Development at Veramaris. "We are pleased to be able to support pet food manufacturers' innovation and strategic sourcing objectives in this way," he concludes. ♦



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A balancing act: the nutritional seesaw of copper and zinc

We all know that trace elements are important for various bodily functions, and we can assume that the same principles apply to pets. When it comes to copper and zinc, this is certainly the case.



Zinc is an important trace element for the development of epithelialization in the skin: the process whereby new skin cells migrate to where they are needed, such as in wound healing. Additionally, it serves as a cofactor in numerous vital enzymes.

Copper is also known to be a component of several enzymes, and it is involved in hemoglobin formation and immune function processes. It is one of the elements required for melanin production and keratin synthesis. However, you can have too much of a good thing, and copper toxicity due to excessive dietary intake is a rising concern for veterinarians.

Copper and zinc: their importance for pets

Zinc carries a vital role in tissues that undergo cell renewal, such as the skin, where healing and reparations are needed. Interestingly, the skin contains approximately 20% of the total body zinc stores, where the highest concentrations are in the nasal planum, tongue and footpads.

In fast-growing young dogs, a deficiency of zinc can be manifested as a condition called zinc-responsive dermatosis, which is characterized by hairless, hyperkeratotic lesions commonly found around the mouth and joints of the puppy. Although it can be quite a scare for the owner, it is a simple condition to treat: all that is needed is a growth-adjusted balanced diet that is highly digestible, and short-term zinc supplementation. Generally, zinc deficiency in both growing and adult cats and dogs is most visible in the skin – causing a rough impression of the hair and dry, itchy skin.

Interestingly, when it comes to copper deficiency, a study in the *Journal of Nutrition* found no signs reported in adult dogs. Nevertheless, in growing dogs and cats, loss of hair pigmentation and rough, dull hair coat were noted as the main clinical symptoms of copper deficiency in the diet. However, copper deficiency is considered to be unlikely in pets, as commercial diets contain adequate copper levels. The liver is the central organ for copper metabolism, and

▶ [SEE NEXT PAGE](#)

hepatic concentration of copper is the most reliable reflection of pets' copper intake and status.

Maintaining the balance: Are we following safe requirements?

The availability of copper and zinc from different foods and supplements can vary, so the requirement for these trace elements is difficult to define. The requirement will depend on the source in the diet (organic versus inorganic form) and the level of other nutrients that can have interactions with both copper and zinc.

Copper and zinc are both known for their sensitive balance, that can be easily thrown off by poor digestibility of the diet, too high concentrations of calcium, or the presence of phytate, found in diets containing high levels of soy. This can ultimately lead to poor absorption and deficiency of zinc and copper in the body.

However, an excess of these elements is also possible. It is hypothesized that the copper contents of many commercial dog foods are greater than the biologic requirement of dogs – and can even exceed the tolerance limit. It has been noted that the mean hepatic copper concentration in dogs has progressively increased over the past decade and this can be correlated to high copper content in commercial dog foods. At the same time, there is a growing body of evidence suggesting an association between high hepatic copper concentrations and the presence of hepatic abnormalities on a microscopic level that could lead to the development of chronic hepatic disease.

Recently, the current guidelines for copper content in commercial dog foods have been critically discussed, and an important question has been raised: Is there any correlation with the increased incidence of copper-associated hepatopathy in dogs that has been noted over the past decade? Clinicians are looking into the possible relationship between the change in the type of copper used in pre-mixes added to commercial dog foods, and increased use of novel protein meats with high organ inclusion rates, such as liver, that could significantly influence the final copper content in the diets.

The dangers of excess

Copper toxicity manifests as copper accumulation in liver tissue, causing damage and negatively affecting liver function. There are 3 causes of hepatic copper

The copper content of pet food cannot be reliably evaluated by reading the pet food label.

accumulations reported in the literature. Firstly, a hereditary defect, as seen in Bedlington terrier dogs. Secondly, the altered biliary excretion of copper due to hepatic inflammation and fibrosis. The third cause of hepatic copper accumulation is excessive intake through the diet.

Excess copper levels lead to a high degree of oxidative damage to lipids and proteins in the liver tissue, resulting in chronic hepatitis. Veterinary diets are formulated to counteract excessive copper deposition in liver tissue, using high concentrations of zinc salts. These are effective in preventing copper accumulation in the liver, as zinc has properties that help with liver integrity. Additionally, zinc ions induce the synthesis of metallothionein, which binds copper making it unabsorbable from the intestine and possibly detoxifying it in the liver. Zinc acetate or zinc gluconate is recommended as the preferred source of zinc added to hepatic diets, since the sulfate form may be associated with gastric irritation and vomiting.

Expert recommendations

Evaluating the copper content of pet food is considered challenging and it cannot be reliably done by reading the pet food label – as the value on the label would represent added copper, and not the sum of supplements and native copper already found in feedstuffs in the diet. Another challenge lies in the fact that there is a wide bioavailability of copper from organic and inorganic sources, such as different salts (copper oxide versus copper sulfate).

Some veterinary clinicians believe that the current recommendations for copper content in adult maintenance canine diets are too high, and may exceed the upper tolerability limit for some dogs, resulting in hepatic disease. They are calling for reconsideration of copper requirements for dogs set by regulatory bodies. ♦



Diana Brozić
Assistant Professor
University of Zagreb



Should there be a limit on the concentration of copper in dog food?

Despite a general consensus on the current rules, there is an ongoing debate in the sector.

The Association of American Feed Control Officials (AAFCO) believes that existing guidelines for the copper concentration in foods for average dogs are, at present, properly and sufficiently regulated. However, it is open to monitoring the situation and eventually improving regulations after concerns were voiced in a study.

How it all started

The minimum inclusion levels recommended by the AAFCO, the organization that sets standards for pet foods in the US, are 7.3 parts per million (ppm) or milligrams per liter (total diet) for adult dogs, and 12.4 ppm for growth, reproduction periods and all life stages.

However, a scientific article published in the Journal of the American Veterinary Medical Association (JAVMA) raised doubts over the existing regulations and called for a maximum copper concentration in commercial dog food to be set.

The article states that the copper level in dogs' livers has risen in the past decades and warned that the copper contents of many commercial dog foods "are greater than the biological requirement of dogs and exceed the tolerance limit for some of them".

The reaction

The suggestions made in the article were analyzed by an AAFCO expert panel.

After analyzing the relevant veterinary literature, the panel determined that the data for setting a "safe upper

limit or maximum tolerance" of copper in canine foods was "insufficient".

The AAFCO's Executive Director, Austin Therrell, says the association remains reluctant to make regulatory recommendations "based on implications or associations without definitive proof of cause and effect".

Voluntary language

PETS International learned that during the last AAFCO annual meeting, which took place in August, it was decided a new workgroup would be formed to explore the development of voluntary language for "low copper claims".

"There's still not enough data to support a maximum copper level, as evidenced by multiple experts who all had different opinions at this meeting," highlights Therrell.

The AAFCO will be paying "close attention" to veterinary literature on this topic but highlighted that until science "definitively shows" additional controls or restrictions are needed, it believes that copper concentration in foods for average dogs is "appropriately and sufficiently" regulated at present. ♦



David Palacios Rubio
Head of Editorial
GlobalPETS



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Grain-free diets re-visited: an update on pulses in pet food

Diets eliminating grains have attracted plenty of attention in recent years, but for all the wrong reasons.

Pet foods marketed as 'grain-free' primarily use pulses, protein-rich seeds such as peas, lentils, chickpeas, and various types of beans found in legume crops. While they began as a popular and healthy alternative to grain-based pet foods, pulses quickly fell under scrutiny following a 2018 FDA investigation on grain-free diets and their potential role in canine dilated cardiomyopathy (DCM). However, this 2022 investigation concluded no causal link exists between grain-free diets and DCM currently.

New research sheds further light on safety

Amidst the controversy, a 2023 study conducted at the Ontario Veterinary College has brought fresh insights into the use of pulses in grain-free pet food formulations, helping re-establish a prospective future for pulses. To date, this is the longest controlled feeding study to assess the safety of pulse-based diets in healthy adult dogs.

The main focus of the study was to monitor the effect of increasing dietary pulse concentrations (primarily peas) on cardiac function, plasma sulfur amino acid (SAA) concentrations, body condition, and blood values over a 20-week dietary trial. Test diets contained between 0%-45% pulse ingredients, reflecting concentrations in commercial diets that meet and/or exceed guidelines from The Association of American Feed Control Officials (AAFCO).

Their data addresses 3 main concerns associated with grain-free diets.

1. Cardiac function

The study found no negative impact on cardiac function among the different dietary treatments after 20 weeks. Even at 45% pulse inclusion, there were no changes to cardiac function (assessed using echocardiography) or to concentrations of biomarkers commonly associated with cardiomyopathy (NT-proBNP and cTnl).

2. Sulfur Amino Acid (SAA) status

Taurine is a non-essential amino acid required for cardiac function and is synthesized from sulfur-containing amino acids like methionine and cysteine. Despite pulses being generally low in SAA, pulse-containing diets did not cause deficiencies in plasma SAA concentrations when fed a complete and balanced diet with 45% pulse inclusion. This means that pulses did not interfere with the absorptive processes of the intestines, since adequate levels of SAA were maintained in the serum and available for taurine synthesis.

3. General safety and efficacy

The study concludes that balanced and complete diets containing pulses, specifically peas, were safe for healthy adult dogs over a 20-week study ► [SEE NEXT PAGE](#)



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period. No adverse effects on body condition, blood values, and biochemical changes occurred among the different dietary treatments.

Overall, the results of this study suggest that dog foods containing pulses are not a causative factor for DCM in non-genetically predisposed dogs. It should be noted though, that this study is relatively small, using only 28 dogs – 7 in each dietary group – and should be interpreted accordingly.

The value of peas

Peas are the second most valuable legume (after soybean), with a rich nutrient profile high in proteins and carbohydrates while remaining low in fats. They are particularly abundant in potassium, B vitamins, and essential amino acids. However, pea protein must be supplemented with SAAs to formulate a complete and balanced diet.

As pet ownership continues to grow exponentially, the need for sustainable and high-quality ingredients has become a priority. Recent animal and grain production shortages have presented challenges, sparking the search for scalable solutions.

Pea production emerges as a promising answer to sustainability. With high yields per acre, reduced water consumption, and nitrogen-fixing capabilities, peas are not only eco-conscious, but also a cost-effective option for pet food formulations.

Future applications

The FDA's inconclusive findings on grain-free diets and the safety demonstrated by recent controlled food trials pave the way for innovative applications of pulses (and more specifically pea protein) in pet food. Some examples include:

Diet sensitivities

Nearly 30% of veterinary visits result from vomiting and diarrhea. Dietary elimination trials are commonly used both in diagnosis and management of gastrointestinal disorders. Current hypoallergenic diets often rely on hydrolyzed or novel protein sources. Pea protein has the potential to be incorporated into hypoallergenic diets as an additional tool to help manage food sensitivities and avoid common dietary allergens.

Pea production emerges as a promising answer to sustainability.

Encapsulation techniques for bioactive ingredients

Bioactive compounds are secondary metabolites found in whole foods that are difficult to preserve due to pH sensitivity, UV exposure, and thermal processing used in extrusion. This limits their use in pet food products unless they are preserved and encapsulated.

The main techniques include spray-drying, emulsion, and complex formation to stabilize lipophilic bioactive ingredients like β -tocopherol, omega-3 fatty acids, and linolenic acid to incorporate them into pet food formulations. Encapsulation has also helped deliver water-soluble vitamins to the intestines for absorption. For example, pea protein microparticles cross-linked with transglutaminase have been used to encapsulate riboflavin (vitamin B2), with 74% to 84% successfully reaching the gastric and intestinal fluids.

Food emulsification

Pea protein can stabilize liquid emulsions and microencapsulate oils to enhance the texture and palatability of pet food. Under the right conditions, pea protein can reduce the surface tension between oil and water, helping form stable emulsions that enhance the overall sensory experience for pets. A recent Agriculture and Agri-Food Canada study shows that pea protein even outperforms soy as an emulsifying agent at a neutral pH.

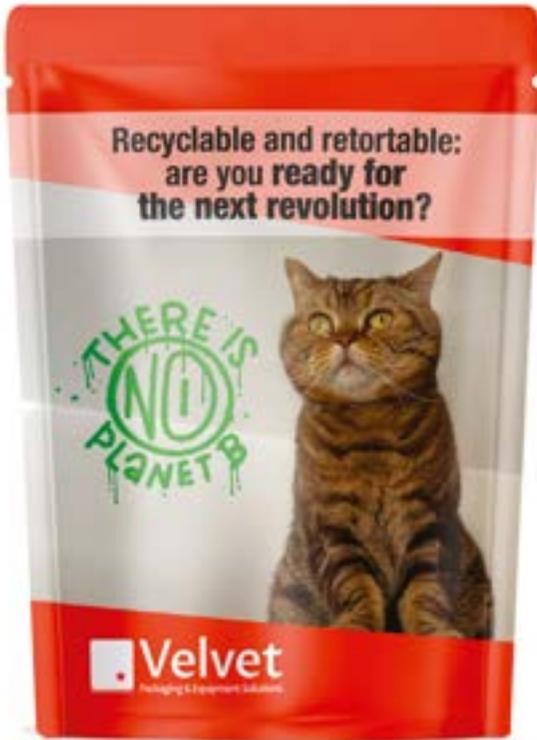
Moving forward

Pea protein has emerged as a sought-after ingredient in the food industry, driven by its versatile applications, low cost, and nutritional benefits.

As consumer demand for sustainable and allergen-free options continues to grow, pea protein offers a promising solution for the future of pet food formulations. With new studies addressing safety concerns, pulses show great potential to shape the pet food industry. ♦



Ashkan Sadri
Veterinary Researcher
Vetabroad.org



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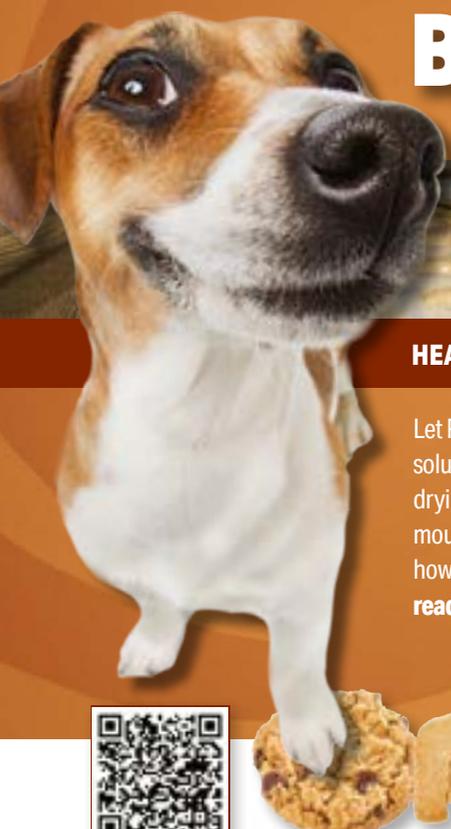
Many pet food companies are still clinging to traditional rigid packaging like cans or trays for wet food. However, in this ever-changing landscape, the shift to retortable pouches presents a golden opportunity for those looking to embrace the future.

This shift promises economic benefits through space efficiency, reduced production costs and design flexibility. Retortable pouches are not only flat and space-saving, but also lighter and more material-efficient, helping to lower production and transportation expenses. They offer creative packaging customization options, allowing brands to attract consumer attention in a competitive market.

In the coming months, recyclable retortable pouches will be available, reducing environmental impact and meeting the growing demand for sustainability.

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Trends revolutionizing pet food manufacturing equipment

The ongoing humanization of pets hasn't just changed what consumers buy. It's also changing the way pet food is made.

Many manufacturers are discovering that their existing production machinery requires an upgrade if they want to remain competitive in today's pet food market. This is being driven by 2 main trends: the rising demand for human-grade pet food, and the growing importance of sustainability. We asked a few equipment manufacturers to share their insights into the market developments.

Explosion of interest

As the name suggests, Pennsylvania-based Reading Bakery Systems started out as a bakery equipment supplier; the founders didn't initially intend to get into the pet food business. But when the company purchased a cookie/cracker equipment manufacturer in the early 2000s, the owners realized the equipment could also be used to make treats for pets. Over the past few years, the firm has seen an explosion of interest from pet food companies looking to make human-grade and human-like baked pet food.

"The machinery is more expensive, but profitable in the longer term. People are willing to pay more for the end products, so you can make a lot more money even though production capacity of the line is lower," says Dulcie Freymoyer, VP of Marketing.

Equipment upgrades

Animal feed equipment firm KSE Process Technology attributes the trend to the ongoing humanization of pets. Consumers increasingly make decisions based on the perceived healthfulness and quality of pet food, just as they would for other members of the family, according to Martijn van Eijk, the company's North America Area Sales Manager for the pet food group.

Meanwhile, Todd Olmstead from processing equipment manufacturer Marlen says that this shift – and the demand for human-grade and fresh refrigerated products that has come with it – has brought new companies into the pet food manufacturing equipment segment as well as prompting existing companies to innovate to keep up with the competition.

Higher standards among consumers, the introduction of a wider array of ingredients – including more vitamins and minerals – and the greater diversity of recipes, have all increased the complexity of pet food manufacturing. This is driving manufacturers to upgrade their equipment and software.

Inspiration from human food processing

"With the increase in demand for human-grade pet food, we've seen companies looking

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at new equipment that they previously wouldn't have needed or even thought of when producing pet food," Olmstead comments. The technology in general might not be new, he says, but it's new to pet food manufacturers.

Freymoyer has noticed interest in co-extrusion equipment that can create filled treats for pets. "We're seeing a lot of high meat content. But besides that, if you've walked through the pet treats aisle, you've probably seen Oreo-type cookies: filled pretzels without the salt," she states. "They're not just human-grade; they actually look like human treats."

To identify technologies that can be applied to pet food production, manufacturers are not only looking to the baking sector for inspiration – as Reading Bakery Systems has experienced – but also to the ready-to-eat sector. According to Olmstead, a growing number of customers are looking at buying equipment like spiral ovens and dicers.

Concern about environmental impact

It's not just human-grade pet food that is affecting manufacturers' equipment choices though. With consumers increasingly concerned about the environmental impact of the pet foods they buy, more manufacturers are asking about energy-efficient equipment and other sustainable options, including the use of alternative fuels.

This has prompted Reading Bakery Systems to offer more energy-efficient ovens, says Freymoyer, and also to begin looking at the next generation of baking equipment. The company has recently added electric ovens with gas penthouses to its line of offerings. This should make it easier for pet food manufacturers to reduce their carbon emissions by switching from gas to all-electric operations. In response to customer inquiries, Reading Bakery Systems has also experimented with other alternatives to gas – including hydrogen – and has various tests in the pipeline.

KSE is similarly working with manufacturers to help them proactively reduce greenhouse gas emissions. According to Van Eijk, upgrading equipment can reduce energy consumption. For example, movable mixers eliminate the need for energy-intensive machinery such as conveyors, chains and pneumatic systems.

Manufacturers are looking to the ready-to-eat sector to identify new technologies.

The wave of the future

While the human-grade and sustainable pet food trends are already here, the biggest trend on the horizon for manufacturers is automation, believes Olmstead. Automation can help manufacturers cope with many of the challenges they face in today's market, such as high costs for materials and labor.

"Manufacturers are embracing sustainable practices and addressing labor shortages through automation," agrees Martijn van Eijk. Automation can also reduce human error, leading to enhanced product quality and reliability, while also increasing efficiency and reducing waste.

Moreover, automated equipment is increasingly intelligent, offering potentially innovative solutions such as fully automatic container transfer and flexible container weighers. This kind of smart equipment can allow manufacturers to take advantage of automation without losing the flexibility that is needed to shift between products and adapt to rapid changes in market expectations.

Versatile and intelligent

According to Van Eijk, equipment must be versatile, intelligent and capable of handling various products and recipes. Reporting tools associated with smart technology can also help manufacturers gain greater insight into their production processes to further lower costs, reduce errors, manage maintenance and energy use, and support compliance with supply chain traceability requirements.

"Responsible pet owners are conscious of what they feed their furry companions and demand transparency in the ingredients used," comments Van Eijk. "A traceable supply chain, which guarantees contamination-free equipment and comprehensive track and tracing throughout the manufacturing process, has become essential. ♦"



Emma Penrod
PETS International Contributor

Pet food labeling and preservative use

'No added preservatives!' The varying water content in pet food affects the need for preservatives, and therefore the labeling and claims of pet food manufacturers.

Microbial growth in food is affected by many factors, including moisture and storage conditions. Commonly used in human food and pet foods alike, preservatives adhere to their name: they aim to preserve food throughout its shelf-life. As pet food comes in many forms, including both wet and dry, levels and types of preservatives differ. This affects many labeling and branding claims used by pet food companies.

Microbial growth formation

Life on earth did not start until one key ingredient came around: water. When it comes to pet food, moisture, together with nutrients in the feed, provides the necessary ingredients for molds and bacteria to grow.

Dry and semi-moist pet food is not sterilized, and microbial growth can be controlled within safe bounds by using preservatives, using nitrogen gas at the end of the production process, or keeping moisture levels at a minimum. Semi-moist feeds have higher moisture contents than dry food and are accordingly more prone to microbial formation if no preserving methods are employed.

Wet food (canned, sachets, trays, cartons) is retorted or sterilized after sealing the packaging, which can be sufficient to stop microbial formation. In contrast, fresh or raw formulations tend to have a shorter shelf-life than the other product categories, and are stored cooled or frozen as the main preservation method.

Water activity as KPI

A frequently used quality measure is water activity (a_w), which indicates the percentage of moisture in the feed

that is available for binding and thereby for microbial growth. For example, one grain may have integrated water as moisture within the grain itself, while another grain is internally drier but has water available as dew on the outside. The latter could be more susceptible to mold spoilage.

Moisture content of the raw materials at intake therefore plays a role in how easily microbes form, but the storage conditions are also important. The temperature and humidity of the manufacturing environment are further factors, together with target moisture levels of the finished product. The manufacturing process and equipment also affect moisture absorption into the finished product and thereby a_w .

Preservatives, not antioxidants

Sometimes confused, preservatives and antioxidants share a commonality in food because both reduce spoilage of food, maintain nutritional content, and decrease formation of toxic compounds – but do so in different ways.

Preservatives reduce the growth of microbes, whereas antioxidants prevent oxidation or rancidity of fat. In a rough summary, preservatives aim to prevent pet owners from opening a bag of food and seeing mold. Antioxidants aim to prevent them from opening a bag and encountering a stale smell.

Preservatives in the EU are acids, such as propionic acid and sorbic acid, that lower the pH of products and thereby inhibit microbial growth. These acids can

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In EU legislation, additives with a legal limit for the target species must be declared.

be stabilized by binding them, as is the case with, for example, calcium propionate and potassium sorbate. Those are 2 examples of ionic chemical bonds, whereas other components might offer stronger covalent bonds. The type of bond determines the strength and stability of the acid – and thereby how long it remains in the pet food and functions as a preservative.

Branding and labeling

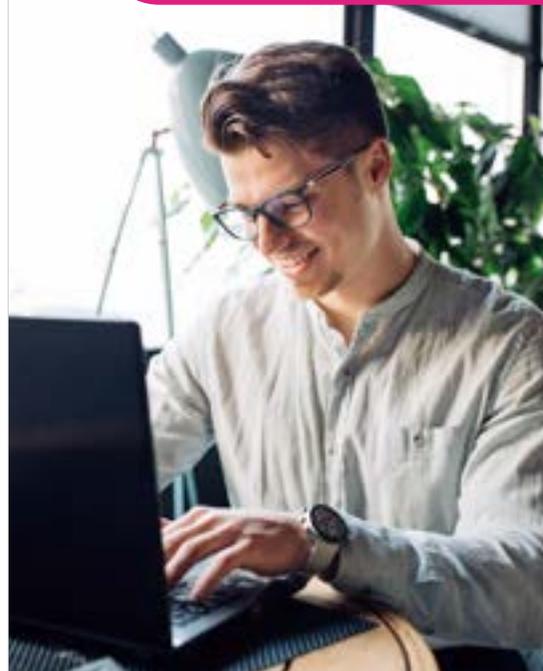
Companies offering branded preservatives have created mixtures of acids which may differ in concentration, and may also include other compounds to provide a synergistic functionality. A commonly added additive is a surfactant which reduces water tension and allows the acids to further enter into the finished product.

Most preservatives used in pet food are feed additives, although there are some feed materials as well. In EU legislation, additives with a legal limit for the target species must be declared. Some preservatives now have a legal maximum where there wasn't one before. However, there is a derogation in place that allows preservatives to be declared as a collective 'preservatives', as opposed to the individual compounds being listed.

In some cases, the pet food contains raw materials which have been preserved themselves. The addition of substances for preservation of the raw materials only, as opposed to preserving the finished product, does not require them to be declared. Their presence would still show in an analysis and the finished product cannot be claimed to be 'free from' preservatives. However, if no preservatives are added other than through the raw materials, the claim 'no added preservatives' could potentially be made. ♦



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Preserving pet food – safety and regulations

There is a growing trend in consumer demand for natural and minimal-ingredient pet foods, in a desire to avoid preservatives. So how safe are these common additives?

Pet owners often view preservatives in pet food negatively. However, the use of antioxidants in pet food is generally well tolerated, and even positively evaluated. While preservatives and antioxidants serve some similar functions, there are distinct differences between them.

Preservatives versus antioxidants

Preservatives are substances added to food products to prevent spoilage, inhibit the growth of microorganisms, and extend the shelf life of the product. They work by stopping or slowing down the growth of bacteria, molds, yeasts and other microorganisms that can lead to foodborne illnesses or spoilage.

Antioxidants, on the other hand, are substances that help inhibit or delay the oxidation process in food. Oxidation is a chemical reaction that can cause the deterioration and degradation of food components (primarily fats and oils). By preventing or slowing down

oxidation, antioxidants help preserve the quality, flavor and nutritional integrity of food.

It's worth noting that some antioxidants, such as vitamin E (tocopherols) and vitamin C (ascorbic acid), are commonly used as both preservatives and antioxidants in food products. They serve a dual purpose by protecting against both microbial growth and oxidation.

Are preservatives in pet food necessary?

Certain types of pet food do not require preservatives due to their formulation or processing methods. For example, canned pet food does not typically contain preservatives because the canning process, which involves sealing the cans tightly and autoclaving them afterward, ensures the destruction of harmful microorganisms. Product claims such as 'cold-filled' and 'without preservatives' are therefore advertisements with self-evident facts

[▶ SEE NEXT PAGE](#)

('truisms') and should be avoided. Pet foods with very low moisture content, such as extruded or oven-baked food, or dried snacks, also often do not require preservatives. However, semi-moist products with higher moisture content usually cannot do without preservatives to prevent the growth of molds.

The use or absence of preservatives does not guarantee the absence of other food safety measures or an extended shelf life. Each pet food formulation may have specific recommendations, and it is advisable to follow the manufacturer's guidelines for proper storage and usage.

Some preservatives used in pet food, such as sorbic acid, acetic acid, and citric acid, are also commonly found in human food. Sorbic acid is a naturally occurring compound found in some fruits and berries, and acetic acid is widely known as the main component of vinegar. However, consumer awareness of additives in pet foods tends to be higher, due to the emotional attachment people have to their pets. Pets' limited ability to communicate their discomfort or adverse reactions to certain foods places the responsibility on pet owners to understand the ingredients and additives in their pets' food.

Ensuring safety with preservative use

It's important to note that while there are preservatives used in both pet and human food, the permitted usage levels and regulations may differ between the 2 categories. Preservatives and their permitted concentrations can vary depending on regional regulations and specific product formulations.

The legal status of preservatives in pet food may also vary depending on the country or region. Regulations governing the use of preservatives in pet food are typically set by government agencies responsible for food safety and animal feed regulations. These regulations can change over time as new scientific evidence emerges, and as authorities update their guidelines.

For accurate and up-to-date information on the legal status of preservatives in pet food, it is best to look into the information given by regulatory bodies, such as the Food and Drug Administration (FDA) in the US, or the

Oven-baked food and dried snacks often do not require preservatives.

European Food Safety Authority (EFSA) in the European Union. These organizations provide guidelines and regulations for the proper use of preservatives (and other additives) in pet food.

Upcoming developments

Regulatory bodies often conduct ongoing research and reassessments to ensure the safety and efficacy of additives in pet food. They may review scientific studies, collect data, and consult with experts in the field to make informed decisions about the use of preservatives. These developments can lead to changes in regulations, such as updates to permitted preservatives, maximum usage levels, or labeling requirements.

An example of this is the reauthorization of potassium sorbate in the EU under the identification number 1k202, which now has a maximum quantity limit for all animal species and thus becomes subject to declaration. The same applies to citric acid (1a330), sorbic acid (1a200) and other re-evaluated additives, which are currently only to be named voluntarily. Consumers are therefore mostly unaware of the use of these preservatives, and could be unsettled as the substances are declared in the future. Compound feed and feed materials containing the relevant additives that are manufactured and labeled before 3 April 2024, may continue to be placed on the market and used until stocks are exhausted if they are intended for pets.

Pet food myths

Although approved preservatives are safe additives, they are not perceived positively by consumers and there are a lot of 'pet food myths' about them. It is therefore now imperative for the pet food industry to develop a communication strategy to improve public perception, or to consider the use of alternative, non-declarable preservatives to maintain consumers' trust and still offer safe pet foods. ♦



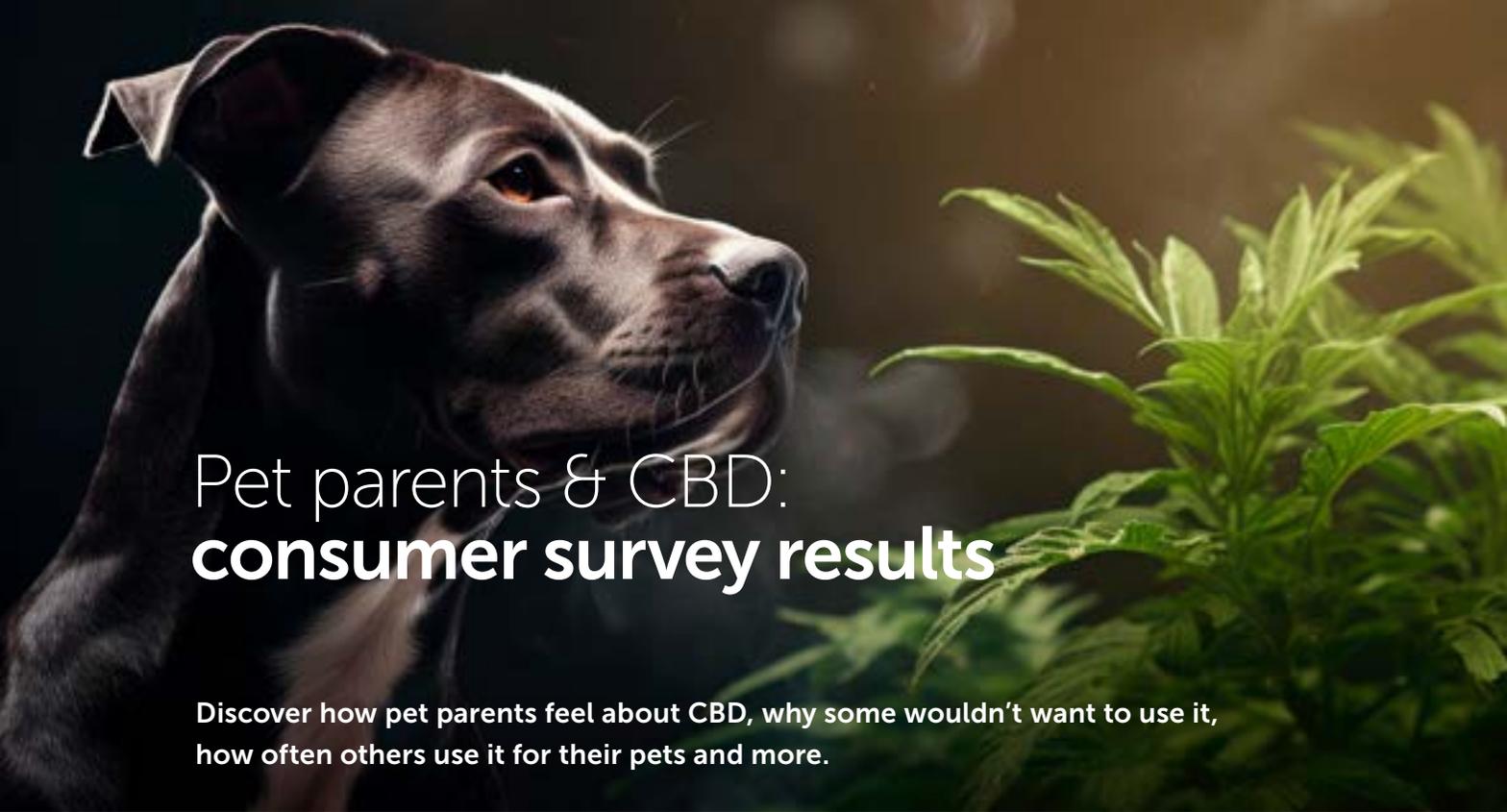
Julia Klischies
Pet Nutritionist, Petfood Expert
Petfood-expert.com



Global pet industry

How's the 'hot' category of CBD for pets doing? What are the latest trends in beds and cushions? How important is social media for pet brands? Can a lower VAT rate help combat rising prices? Find all the answers. Plus, more details on the GlobalPETS Forum and supermarkets entering the pet space.

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Pet parents & CBD: consumer survey results

Discover how pet parents feel about CBD, why some wouldn't want to use it, how often others use it for their pets and more.

In collaboration with Yummypets, we asked 944 dog and cat owners about their thoughts on CBD (cannabidiol, a cannabis ingredient with certain health benefits) and their purchasing habits.

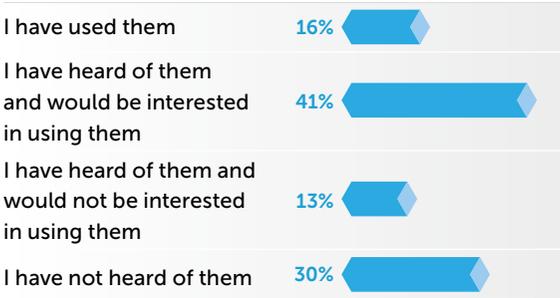
Pet parents from the US (33%), Canada (31%), France (20%) and the UK (17%) participated in the survey.

How interested are they?

Most pet owners (72%) are familiar with CBD, but nearly half of those surveyed (49%) indicate that they'd never bought a CBD product for themselves or their pets.

About 16% of pet parents have bought a CBD-based product for their pets, 41% of pet parents would be interested in trying one and 13% aren't really interested.

Which of the following describes your CBD pet products experience/attitude?



As US consumers are most familiar with CBD – and the strongest proponents for it – it's no surprise that they're also more likely to have bought these products for their pets. On the other hand, French consumers are least likely to have purchased CBD products. They're also the least acquainted with it and are most likely to strongly disapprove of CBD.

How often do they buy?

Of those respondents who have bought a CBD pet product before, the majority indicate that they have only tried it once (18%) or rarely give it to their pets (33%). A small group of CBD buyers (13%) regularly give these products to their pets.

Interestingly, while more US pet parents have tried CBD for their pets, they don't use it more often. So, even though CBD is more widespread in the US, this popularity doesn't necessarily equate to more frequent use. UK pet parents are most likely to have just tried it once.

This could have something to do with the fact that a large portion of CBD consumers (47%) tried it for the first time in the last 6 months – so they might not have had enough time for repeat usage.

In fact, 82% of people indicated they would buy a CBD pet product again. Only 8% think they won't.

Product popularity

The most popular types of CBD pet products are the most readily available: oils (63% have used it) and chews (59%). Biscuits (22%), sticks (12%) and paste (9%) are bought much less.

US consumers prefer chews over oil. Canadian pet parents, on the other hand, prefer oil over chews.

Effect & satisfaction

Most owners who have tried CBD pet products (71%) indicate that they're satisfied with the effect the product had on their pet. 78% indicate that they noticed positive changes in their pet after consumption.

The experience of a small group of pet parents was less positive: 14% indicate that they noticed some negative changes in their pets after consumption.

The motivations behind (not) buying

The most common reasons people buy CBD-based pet products are for stress relief (65%) and relaxation (54%). Others include pain relief (41%), joint care

(27%), general health improvement (31%) and mood enhancement (30%).

Of those who haven't bought any CBD pet products, 41% indicate that their pet doesn't need it. Uncertainty or limited understanding about these products also plays a role: 35% are concerned about product safety, its legality (22%), whether their pet would become addicted (21%) or high (21%), or that the benefits haven't been proven (29%).

If non-buyers were to start buying CBD products, the main reasons would be stress relief (62%), pain relief (57%), relaxation (50%), joint care (46%) and general health improvement (43%). ♦

Special thanks to *Yummypets*



Philippe Vanderhoydonck
Managing Director
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CBD pet products: the state of play

Pet-specific CBD products are on the rise, but some regulatory challenges are halting developments in the sector.

It might seem that CBD hasn't thoroughly infiltrated the pet market, but a lot of evidence suggests the contrary. Valued at \$196 million (€180M) in 2022 by Grand View Research, the pet-focused CBD sector is set to witness 31.8% year-on-year growth to reach \$1.71 billion (€1.57B) in 2030.

And while these figures are global, the US is the epicenter of this industry. CBD products for pets are so popular that there's a National Pet CBD Day in the US, celebrated on 21 April.

Regional differences

The presence of key players, and a greater understanding of the benefits of CBD products, are driving the sector forward in the US. "Pet parents across the world are, for the first time, acknowledging that the pet is a member of the family, and nowhere is this more apparent than in North America," explains Charles

Lozow, a US Lawyer and co-founder of the Veterinary Cannabis Society (VCS).

Combine this with "a national and state regulatory system that was initially very open", he adds, and it has paved the way for the rapid adoption of CBD pet products by pet parents "seeking natural alternatives to harmful pharmaceuticals and invasive procedures".

But there's a flip side to the story across the Pacific. While Asia is predicted to be the fastest-growing region in this sector, it's riddled with regulatory challenges – an obstacle affecting this industry internationally.

Blanket ban

In February, the Hong Kong government introduced a blanket ban on CBD, classing it – and other cannabis-derived compounds like tetrahydrocannabinol (THC) – a dangerous drug.

[▶ SEE NEXT PAGE](#)

The ruling wiped out CBD pet companies on the island, and Lozow explains that the ban appears to be founded on concerns about the presence of THC in hemp-derived CBD products.

“Unfortunately, the unintended result of the very severe penalties is that it is fueling the grey and black markets for CBD, including CBD pet products,” he says.

European approach

In the UK, the Veterinary Medicines Directorate has classed CBD as a drug that can only be prescribed by vets, meaning that human-centric CBD products require marketing authorization to be sold for pets. No company so far has the approval to do so.

Across the EU, CBD for pets is regulated as a ‘novel food’, so it must be safely evaluated before being marketed as a food supplement. The VCS co-founder says that while the European Food Safety Authority – the body responsible for such assessments – has published a scientific opinion deeming CBD safe for pets when used according to the proposed conditions, the EU hasn’t approved any CBD products for vet use yet.

Researching specific formulations

One organization hoping to get marketing approval is UK-based Pet Pharmaceuticals. Heidi Whitman, an advisor to the company, says regulatory challenges in Europe are more about proving the consistency of formulations, a quality that whole-plant CBD lacks.

The company has also proposed research evaluating “very specific formulations of cannabinoids and terpenes with regards to safety and efficacy for a variety of conditions commonly affecting pets”. Whitman explains that “Dosage is key to getting the maximum effect from cannabinoids, and our research will determine what these should be.”

Boom or bust?

In the US, the Food & Drug Administration (FDA) has denied 3 citizen petitions calling for CBD products to be marketed as dietary supplements. Despite that, there are signs of progress.

“CBD supplements are already being widely marketed in the US for both humans and animals,” Whitman points

CBD products for pets are so popular that there’s a National Pet CBD Day in the US.

out. “Producers have to be cautious not to make any claims in their marketing that the FDA would consider to be ‘drug claims’, but other than that, it largely steers clear of the supplements market when it comes to hemp-based CBD products.”

Charles Lozow says that Congress is finally forcing the FDA to act, after reintroducing legislation – including the Hemp Access and Consumer Safety Act – providing regulatory pathways for CBD as a food and beverage additive and allowing hemp-based CBD (and other ingredients) to be marketed as dietary supplements. “It’s likely that the FDA’s action will, at least, not allow the treatment of CBD to be like most other supplements in the US, and that the FDA will craft another regulatory regimen to apply to this and other prevalent molecules from hemp.”

Heidi Whitman adds that most regulatory issues around CBD exist due to the confusion separating hemp-based products from those with higher THC content: “There’s a lot of misinformation and a lack of understanding in the legislative and regulatory community.”

The way forward for CBD

Have these regulations – compared with the various ill-effects cited by governments imposing them – punctured the pet CBD boom?

Not according to Lozow, who says the sector will keep growing, as the scientific and veterinary community continues to grasp CBD’s safety and medical potential.

Neither expert believes that there are serious health detriments associated with CBD use. Whitman says animal-specific studies have shown only mild negative effects of CBD when given at very high doses: “At most therapeutic doses, there are no demonstrable negative effects. Clearly, there’s a much narrower margin of safety for THC. This is a good example of the kind of confusion that’s out there.” And despite a notable rise in use, Lozow says “the number of reported adverse events continues to be remarkably low”.

VCS believes that “wrong-headed” CBD regulations can be overcome through science-driven data, education and effective advocacy. “These tools must be directed to the regulators and lawmakers – at local, state, federal and international levels – to demonstrate that CBD is a safe compound,” says the VCS co-founder.

Promising signs

The US National Animal Supplement Council (NASCC) recently announced a successful study showing the tolerability of CBD products in healthy dogs. Results showed that cannabinoids were well tolerated when healthy male and female dogs were dosed for 90 consecutive days. “Based on the data available, it was the conclusion of the authors that these substances do not pose significant risk to dogs in long-term use,” the NASCC says.

And in July, delegates at the European Association of Veterinary Pharmacology and Toxicology congress saw Innocan Pharma present insightful CBD research results on pharmacokinetics and pharmacodynamics.

Education is the key to increased acceptance among consumers and vets.

Education is crucial

Whitman and Lozow both pinpoint education as the key to increased acceptance among consumers and vets – a crucial goal given that the latter are the former’s “primary influencers”, as Lozow puts it. Pet Pharmaceuticals is working with organizations, including the VCS, to provide reliable safety information to pet owners, medical professionals and regulators for CBD use in pets.

More research and positive regulations will allow for the safe production, sale and use of CBD within the medical community. As vets grow more comfortable with using CBD for pets, Whitman predicts increased interest due to the efficacy and more favorable side effects than many other similar pharmaceuticals. ♦



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Controlling anxiety and stress in pets

We analyze what the market has to offer for mood and pain management.

According to the American Pet Products Association (APPA), the use of calming products has recently grown considerably. Estimates show that 11% of dog owners and 6% of cat owners regularly give their pets calming medicines.

The use of shirts/suits, treats, music and toys as calming products for dogs also increased in the US between 2020 and 2022. For cats, calming toys are the most popular (27%), followed by treats (15%), collars (13%), sprays (12%) and music (11%).

Looking at product launches, and innovative product designs, there is significant consumer demand for pet beds and condos, vests, shampoos and gels.

Treats in the lead

Treats and supplements create the greatest demand for calming products. They are the preferred category for ease of use and a combination of health benefits.

Some of the latest launches in treat-type supplements for stress and anxiety management include US-based Snuggle Puppy's Puppy Bites, formulated as night-time supplements, and Badlands Ranch's Super20, the brand's entry into the pet supplements market. Both products focus on the so-called hypothalamic-pituitary-adrenal (HPA) axis, regulating stress levels in dogs in addition to promoting joint, muscle and tendon health.

The US fresh pet food company PetPlate also recently launched calming supplements. These use

the medicinal herb ashwagandha and amino acid L-theanine to help pets relax.

Other product innovations

Product design innovations promoting calmness are particularly interesting for pet mood management.

US-based Hiddin Products makes functional home accessories like cages and crates with clear acrylic. Its products aim to manage separation anxiety and promote pet relaxation. The transparent build eliminates the obtrusive fencing and gates often used in pet crates.

Thundershirt's anxiety vests and BuddyRest's weighted blankets are still preferred items among pet parents. Puzzle, automated laser and Kong toys are also increasingly popular, with more products now on the market offering innovative ways to promote mental stimulation, targeting pet restlessness and boredom.

For pain relief, the latest innovations are light therapy pads, such as one manufactured by China's TheyPet Medical, and far infrared technology (FIR) vests, like the South Africa-based Steed and Style's Protechmasta range.

CBD

It is estimated that 37% of US dog owners purchased a CBD product for their pet last year, with 34% keen to continue doing so this year, according to APPA. CBD (cannabidiol) is a key category of products used to manage anxiety, stress and joint pain in dogs, as

Product innovations in the pet calming category are led by the humanization trend.

well as anxiety and arthritic pain in cats. About 16% of cat owners and 15% of dog parents use them to manage pain.

In the US, treats and shampoos are the most common products containing CBD, but food toppers, oils and supplements are much sought after too.

UK-based pet supplements brand Snoop's Store has introduced a daily Hemp Seed Oil supplement. This improves sleep and benefits relaxation by easing inflammation and helping digestion.

Colorado-based Pet Releaf recently added 2 CBD shampoos and conditioners to its portfolio. When the company launched its first CBD products in fall 2022, everything sold out on the first day. The products were quickly picked up by many distribution partners, including Southeast Pet, Newco and Supreme Pet Supply.

Launches in Asia

Innovations are appearing on Asian markets too. Californian med-tech company Ainos recently launched its VELDONA supplements line in Taiwan. Formulated for emotional health and stress relief for cats and dogs, it aims to generate a whopping \$20 million (€18M) in sales by 2024.

After a successful introduction in the United Arab Emirates, Indian company Soul Strips is looking forward to bringing its oral supplement strips for pet anxiety and joint mobility onto the home market.

Malaysian premium food brand OzPro has announced plans to expand into the pet supplements market with products targeting musculoskeletal health and joint mobility as a preventive measure for pain management. ♦



Muskaan Gupta
Associate News Editor
GlobalPETS



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Dušan Plaček, CEO of Plaček Group

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Torsten Toeller, Chairman of Fressnapf

More info & tickets? globalpetindustry.com/gpf



Are you coming to the pet industry's leading networking event?

In January 2024, around 250 executives from leading pet companies will gather at the GlobalPETS Forum in Venice for 3 days of networking and inspiring presentations. Will you join them?

Since 1999, the GlobalPETS Forum has been a popular meeting place for the industry. It's an opportunity to reconnect with old friends or acquaintances and make new business connections. It's also a chance to learn more about where the industry is going, which consumer trends to keep an eye on, and how to prepare your company for continued success in the future.

The program

The upcoming edition of the GlobalPETS Forum spans 3 days, from 24 to 26 January 2024, at the 5-star Hilton Hotel in Venice (Italy). The program is as follows:

Day 1. The event kicks off with an optional tour of pet retail stores around Venice. Afterward, an informal evening dinner gives you the opportunity to socialize with other attendees.

Day 2. From the morning until the evening, the program is jam-packed with high-quality presentations and networking moments. At the end of the day, it's time to relax and network in a more informal setting as you enjoy a delicious 'walking dinner' during the renowned Social Evening.

Day 3. On the last morning, you'll get your final dose of inspiration from top speakers, followed by a networking lunch before heading home.

Who you'll meet

The attendees are a diverse group of senior-level executives (C-suite or VPs/directors) from a cross-section of the worldwide pet industry. For example, you might bump into one of the major European pet retailers while grabbing an extra scoop of delicious

pasta at the buffet, or you could find yourself sitting next to the CEO of a pet food company, a distributor from the Middle East, a branded pet toy manufacturer from the US or a packaging supplier.

With a high repeat-visit rate, the GlobalPETS Forum has proven to be a can't-miss event, and this is largely due to the quality of the interactions and the diversity of the attendees. Every year, we're proud to hand out 'loyalty awards' to people who've attended for 10, 15 or 20 years.

What you'll learn

The industry has endured a rocky ride in the last few years: from a booming pet population and increased consumer demand, to shipping issues, rising container costs, higher prices and – more recently – inflationary pressure and a decreasing pet population in some countries.

What does this mean for our industry going forward? Which new trends are starting to emerge? How will consumer preferences continue to evolve? And how does your company need to switch gears to deal with these changes? The event will provide answers to these and other questions.

How to register

Don't miss this opportunity to join fellow pet industry professionals for 3 days of insights and networking!

For the full program and to register, go to the event website: globalpetindustry.com/gpf

The speakers

We've put together an impressive lineup of top speakers, including:



Nicolò Galante, CEO of *Arcaplanet*, will provide insights into the performance of Italy's largest pet retailer and its plans for the future.



Eli Hasson, Investor and Director of *Pet Health Innovation Labs* (the venture arm of Australian pet retailer Petstock), will discuss innovation in the pet industry.



Industry veteran **Jeffrey David**, Chairman of *Musti Group & Independent Pet Partners USA* and founder of *Petbarn*, will talk about his global pet industry observations, lessons learned and future industry predictions.



Matthieu Glayrouse, co-founder of *Yummypets*, will present consumer insights gathered from the online community of pet parents.



Liseth Galvis, Senior Research Analyst at *Euromonitor*, will share her predictions for emerging trends and pet consumer developments in 2024 and beyond.



Marta Sutkiewicz, VP Global Research Solution at *Similarweb*, will use online search and marketplace data to analyze trending pet categories in different countries and regions.

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M-PETS is a key player in the manufacturing and distribution of pet products. The company provides a wide range of innovative and exclusive products for dogs and cats, with over 350 patents, and is available in 50+ countries worldwide. M-PETS products feature stylish designs, engaging functions and certified ecofriendly materials (FSC, TÜV Rheinland, GRS).



Pet Food Competence Network

The Pet Food Competence Network comprises 11 like-minded companies, with decades of combined experience, giving you simple and streamlined access to the very latest the industry has to offer. The domain expertise of each company is merged into a complete, tightly integrated production solution that can be scaled and fully connected to match your requirements.



GlobalPETS Forum Award 2024

Who will follow in Snellman Petfood's footsteps – the winner in 2023 – and win next year's prestigious GlobalPETS Forum Award?

The GPF Award is presented annually to a company in the pet industry that has demonstrated exceptional performance.

After 2 decades, it has become one of the most important awards in the industry. Curious about who will win in January 2024? Join us in Venice to find out!



Kormotech

Kormotech, a second-generation family business, is the largest Ukrainian producer ranked 55th in the world's top

pet food producers list. Their mission is to change cultural patterns toward pets in Eastern Europe. 3 production plants in Ukraine and Lithuania produce premium and super premium brands of pet food and private labels, exported to 40 countries.



Earth Rated

Earth Rated is a B Corp-certified company that creates thoughtfully designed dog products. With a focus on

innovation and responsibility, Earth Rated is dedicated to making everyday moments for people and their dogs simpler and better. Their products are used by over 4.5 million people daily and can be found in over 20,000 stores worldwide.



Laroy

This Belgian pet supplies company, based in Ghent, caters to all pet categories with a wide range of product

lines. It's a powerhouse in food and non-food goods with 2 European food production plants, an in-house design team and 22 product developers bolstering an ever-evolving portfolio of added-value items to entice end-users and their pets.



Vet Planet

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15 years of love for animals resulted in the widest, high-quality professional product range of supplements, diets, pet food, snacks, tests and dermocosmetics, sold under the brands: VET EXPERT, RAW PALEO and Mr. BANDIT. A science-driven approach, best-in-class R&D experts and a 'based on evidence' commitment led to veterinarians' trust and a global scale of operations (45+ countries).



Tractive

Tractive is a leading GPS-tracking and health/activity-monitoring platform for cats and dogs. Founded in Austria in 2012, Tractive has grown to 1 million paying subscribers globally. Their devices allow pet parents to locate their pets and receive health alerts if irregularities in activity, sleep or behavior are detected. ♦



The unique story of the Plaček Group

Since starting out as a wholesaler, Plaček has become the largest pet retail group in Eastern Europe.

Dušan Plaček first combined his love for animals and his entrepreneurial spirit when he was just 16 years old. Back then, commercial businesses were not allowed in the Czech Republic. Bricks-and-mortar stores selling pet supplies were controlled by the state and carried an identical product assortment nationwide.

Because private trading was only possible on local markets, that's where Plaček started his business, buying and selling aquarium fish.

The vision

When Plaček subsequently traveled abroad, in 1989, he saw pet shops overflowing with high-quality products and live pets inside the stores. Immediately, he had a vision of what he wanted to do in the years ahead.

He started importing goods that up until then had been unavailable to Czech breeders, especially at such previously unseen quality levels. He founded the Plaček company in 1991 and the group's wholesaling chapter began.

In the following years, Plaček started recruiting like-minded people and the company expanded internationally to the wholesale markets of Slovakia and Russia. Later in the 1990s, the first Plaček company facilities were built in Poděbrady.

The start of retail

In 2004, Plaček's dream of building a retail chain selling live animals increasingly started to take shape. The Super Zoo project was created in the Czech Republic, followed by the acquisition of the Dino Zoo company in Latvia.

In 2008, Super Zoo entered Slovakia. Then in 2014, the group acquired Poland's largest pet retail chain, Kakadu. An online store was launched to get as close as possible to the end customers.

Adding brands to the mix

The organization's product offering has evolved over the years. Whereas the business started out by sourcing the majority of products from foreign

suppliers, Czech producers gradually joined the group. Today, the Plaček Group predominantly focuses on its own brands, including Elbeville, Ontario, Prospera Plus, Rasco Premium, Repti Planet, Nature Land, and more.

Fast-forward to today

In 2023, the Plaček Group operates more than 350 stores, with e-commerce activities in the Czech Republic, Slovakia, Poland and Latvia. In fact, it opened Europe's first 24/7 pet supplies store. With more than 1,000 independent wholesale customers and over 2,500 employees, the group achieved total sales of over €260 million (\$282M) in 2022.

For the coming years, the Plaček Group has ambitious plans, but it firmly believes that – with the help of customers and employees – it will be able to successfully add more chapters to its truly unique story. ♦

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The power of social media for pet brands

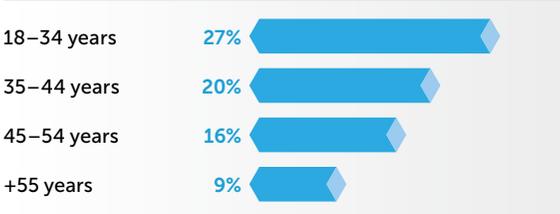
Pet businesses are relying more and more on their social media presence to increase visibility and sales. For good reason.

Pet brands are increasingly using social media to engage directly with customers and connect with potential new ones. With consumers bypassing official websites in favor of social channels, a brand's social media presence now offers everything from customer support and guidance to direct sales.

The power of social

A 2021 survey from management consulting firm McKinsey & Company found that 22% of Gen Z and 26% of millennials believe social media has influenced them to buy pet food and supplies – and that doesn't include those who have been influenced on a subconscious level.

Use of company social media pages to discover pet products and brands, by age group



Source: FWV Fetching (1,493 US pet owners, June 2023)

Furthermore, recent research from leading pet and veterinary PR firm FWV Fetching concluded that 1 in 5 pet parents use human or pet social media influencer pages to discover new pet products and brands. Only 14% admitted not using any marketing channels for those purposes.

“Social media is great for pet lovers,” says Hannah Page, Social Media Manager at Inspired Pet Nutrition. “We’re not just trying to cram a product in your face – it’s demonstrating that we know what we’re talking about because we are pet owners and we really care.”

Different platforms for different customers

An aggressive sales approach (or a hard sell) is generally not well-received by social media users. However, the type of content that does gain traction may be somewhat surprising.

Emily Wardle, Associate Director at UK-based spottydog communications, recalls a series of videos the firm did for dog collar brand Canny. “Even though they’re really educational, we got 100,000 views and 2,000 likes – so obviously, it’s tapping into the fact that a lot of people are struggling with their dog on a lead.”

[▶ SEE NEXT PAGE](#)

For Hannah Page, the core 3 channels are Instagram, Facebook and TikTok. While Facebook has a slightly older audience, Instagram has more millennials and TikTok is more Gen Z.

"But there's obviously a crossover on all platforms," Page admits. Instagram performs the best, she adds, especially at reaching new pet owners.

Pros and cons

While Instagram offers reliable and effective pet marketing, done right, TikTok and its eerily reliable algorithm can put you in front of younger customers eager to pamper their pets. Here, the key is to keep an eye on the trends and jump on them when you see them.

"There's one video going around at the moment to do with 'your dog's red flags'," says Page. "Because people are just hopping on the trends, ones like that do really well."

But it's not for those too precious about brand messaging. "If you try to put product messaging out though, it generally won't perform as well," says Page. "It's got to be very relatable. It's got to be reactive content. It's got to be funny and engaging."

The unknown success

And even then, it's hard to predict success. "I just think TikTok is a bit more hit and miss," says Wardle. "Sometimes you're surprised that something goes viral, and sometimes you think, 'Oh, this is quite funny', and it falls flat. The key is to keep going with it."

"You've got to be on it every single day, and it's quite a lot of effort," agrees Page, who acknowledges the luck involved. "Unless you're posting regularly, TikTok just doesn't push your videos out there, so you've got to be on it 24/7."

Costs

With all the social media platforms to manage, things can get expensive, running into thousands per month – but it doesn't have to be. Wardle says her agency works with clients for as little as £200 (\$251 / €233) a month.

People trust influencers more than they do brands.

"Organically, you can do it very cheaply," says Becks Brockwell, Co-Founder and Director of digital marketing agency eCollective Digital, adding that with user-generated content, you no longer have the considerable costs of photo shoots.

"Our ability to be agile with costs is probably one of the most exciting things for brands," she continues. "We can and do work with everyone from huge global companies with 99% brand recognition, right down to someone who's just decided to launch the most spectacularly beautiful leads for dachshunds."

Becoming viral

To an extent, social media is an equalizer because anything can become a viral sensation. But as a rule, the more you spend, the more eyeballs you can get in front of your brand, especially with Facebook, where paid promotions are essential.

However, according to Brockwell, virality isn't something to necessarily aspire to anyway. "I think viral is maybe not all it's cracked up to be," she says, explaining that smaller companies may be unprepared for the sudden rush of orders that dries up as quickly as it appears. Consistency and steady growth are better aspirations.

Influencers versus brands

Influencer culture has exploded in recent years, and it's hard to imagine many brands sidestepping influencers entirely. "If you do, you've just got to accept that your results won't be as impactful," says Wardle.

"People trust influencers more than they do brands. So if you can build that relationship with the influencer, and they can get your message out there, it's like old-fashioned PR, really," she adds.

This trust comes down to a word that crops up a lot when talking to social media agencies in the pet space: authenticity.

This isn't just a case of finding a celebrity pet with the most followers. Micro-influencers – those in the 5,000

to 10,000 follower range – may have a smaller audience, but it’s often more engaged, and they won’t necessarily require payment beyond product samples or affiliate income from the sales they drive.

“If you send them a product and they post about it, 5,000 followers might get 1,000 likes – a fifth of their audience,” Wardle says. This can prove more effective than a giant influencer with a less engaged following.

These micro-influencers – often regular pet owners who had no ambitions to become Insta-famous – offer authenticity in spades and can instinctively know what works better than risk-averse brands.

Threads, the new platform

While conducting interviews for this piece, a new social media venture was born: Threads, a Twitter (now: X) rival from the owners of Facebook and Instagram. It’s too young for brands to pay much attention to at the moment, but that could change – after all, TikTok wasn’t worth much attention once.

“I think if we were to do Threads properly, we’d probably give more people access,” muses Page, who sees it as a more conversational platform. “Like nutritionists can share stuff they’re thinking about: ‘Hey, we’re thinking of launching this new flavor, what do you think?’”

Whatever the future of Threads and other channels that may spring up, historically speaking, the pet side of social media has been defined by its friendliness and joy, which makes it especially conducive to an engaged brand.

“That’s what’s so refreshing about this part of the social media world,” says Brockwell. “It isn’t toxic. It’s actually rather beautiful. Who would have ever thought that you’d end up following a sausage dog?” ♦



Alan Martin
PETS International Contributor

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What's trending in beds and cushions?



From better ergonomic support to recycled and certified materials; these are the innovations in the pet bed category.

Barkitecture dominated designer furniture trends in 2022 and continued to influence product development this year. Beyond the humanization of pets, higher spending and an increased interest in designer and comfort products have led to diversification and frequent launches across the pet bed and cushion categories.

Expenditure

The American Pet Products Association's (APPA) 2023 survey reveals that 85% of dog owners and 75% of cat owners in the US have a bed for their pets. Almost 40% of owners have at least 1 bed, and about a quarter have 2.

During 2022, dog owners spent an average of \$72 (€79) on pet beds, while cat owners spent \$54 (€59). When it came to crates and cages, pet parents spent an average of \$88 (€96) for dogs and \$117 (€128) for birds.

Consumer demands

'Certified ingredients' and 'eco-friendly products' are some of pet parents' demands for their furry friends' beds and crates.

Kristin Moerman, Vice President of Creative at Central Home Brands – one of the largest pet furniture retailers – tells PETS International that pet parents seek transparency in ingredients, materials, and related third-party certifications "to make them feel confident in their buying decisions".

"Exciting new launches in pet bedding continue to demonstrate the benefits of innovative materials like thermoregulation and microencapsulated fabric technologies, which are associated with a wide range of therapeutic benefits for the pet," she says.

Multi-use and convertible beds, which can function in various spaces in the home or on the go, are also increasing in demand.

Luxury versus value

Luxury beds are an ongoing trend. According to the APPA, 9% of American cat parents owned designer beds for their felines in 2022. It is believed that 15% of millennial cat owners have a designer bed.

Earlier this year, Italian luxury brand Gucci began retailing plush mini settees for upward of £5,000 (€5,800 / \$6,370). When it comes to luxe styles at a much more affordable price, FÜZI PETS' April collection created quite a stir with its buttery soft faux fur designs.

Luxury mattress e-commerce retailer Saatva recently launched a luxury pet bed featuring an ergonomic design fitted with micro-coils to aid spinal alignment and a water-repellent fabric cover that combats pet dander.

However, Kristin Moerman points out that value is essential when purchasing these products. "We

are seeing consumers prioritize price as a primary purchase driver.”

Therapeutic designs

Retailer Orvis witnessed a sales increase of 20% in their dog category between 2018 and 2022, led by its dog beds, hinting at the rising demand for products in this category.

The company has recently launched the Orvis RecoveryZone Couch Dog Bed, which specifically targets rest and recovery for active dogs of all ages. The product combines memory foam to maximize weight distribution, reducing pressure points and stress on a dog’s joints, muscles, and ligaments when lying down, and increases circulation for faster recovery. Its cover promotes airflow and breathability, regulating the dog’s body temperature and aiding in better sleep.

“Consumers want what’s best for their dog’s health and the environment, as well as the quality and longevity they expect from premium brands,” says Steve Hemkens, Vice President of Global Brand Strategy at Orvis.

Higher functionality

Other demands from pet parents are higher functionality, waterproof, anti-bacterial, scratch-resistant, and stain-repellent fabrics.

Hangzhou-based TianYuan Pet’s portfolio ticks all these boxes with its bedding options. The company’s Cozy Life series offers beds, cushions and even pet houses with orthopedic support, while the anti-static series features easy-to-clean fabric. Using ultrasonic embossing fabric ensures easier cleaning while providing a stylish appearance. The material also promotes warming and cooling features.

In addition, the company’s products use eco-friendly and sustainable materials certified by Taiwanese and American environmental protection agencies. “The key trends for pet beds in the Chinese market are going toward product innovation and recycled materials,” highlights Cherry Weng, Sales Director of TianYuan Pet. ♦



Muskaan Gupta
Associate News Editor
GlobalPETS



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NATURAL FOOD INGREDIENTS





Interzoo 2024

7–10 May, Nuremberg, Germany

Interzoo: Market developments under the magnifying glass

The world's largest and most meaningful trade fair for the pet industry will highlight various international trends and will connect the global pet industry in Nuremberg, Germany, from 7 to 10 May 2024.

The segmentation of products in the global pet supplies industry has become increasingly fine-grained, with trends like the humanization of pets and the premiumization of products leading the way. In their wake, lifestyle is also becoming increasingly important – both in product design and in the choice of distribution channels.

The importance of lifestyle

"Pet parents are increasingly aiming to express their bond with their beloved furry family member. More and more, pet products need to match the lifestyle and attitude of the pet parent," explains Gordon Bonnet, Managing Director of WZF – Pet Industry Services and the German Pet Trade & Industry Association (ZZF).

In fact, people sometimes even buy pet products as complementary accessories when buying clothes or products for themselves. "With the pet being regarded as a true family member, we're starting to see an effect on retail segments as well. Pet products are now appearing in furniture stores or bakeries, where we would not traditionally expect them," he adds.

Diverse with international appeal

These developments will be reflected at Interzoo, which is the industry's leading gathering of established players, innovative start-ups and exciting products from around the globe. "Interzoo is the most

important place to maintain and expand contacts, to follow trends, to initiate business and to be a part of the pet industry," says Dr. Rowena Arzt, Head of Exhibitions at Interzoo organizer WZF.

The huge diversity and the international appeal of Interzoo are 2 strong reasons for new market entrants to attend the 4-day event. "More than 10% of the exhibitor registrations so far are newcomers to Interzoo. We're very pleased to see this market dynamism and welcome them to the 'world of pets' at Interzoo," comments Dr. Arzt. With 7 months to go until Interzoo 2024 (7-10 May), companies from more than 60 countries have already registered – and there will be more to come.

High-quality supporting program

Interzoo offers an attractive supporting program with insights into hot topics and trends within the global pet industry. The Fresh Ideas Stage puts a special focus on start-ups presenting innovative products. On top of that, exhibitors and visitors can benefit from numerous conference sessions on specific markets and regions, while the Interzoo Party is a prime networking event. Interzoo 2024 is complemented by Petfood Forum Europe, which will take place on May 6, one day before the exhibition starts. ♦

Register to exhibit or attend now at interzoo.com/en



A lower VAT rate to tackle price spikes?

The industry is calling for a temporary solution to inflationary pressure, while experts examine whether end consumers will benefit from reduced VAT.

In response to the challenges that pet parents are facing due to inflation, national pet food manufacturers' associations are calling on governments to consider a temporary reduction of the value-added tax (VAT) on pet supplies. They claim that pet food should not be treated as a luxury item.

Illogical in Italy

According to Italy's Association for Pet Feeding and Care (ASSALCO), inflation has hit pet food sales the hardest where distribution channels showed more growth in value than in volume. Pet food sales in grocery stores – the country's largest distribution channel – increased by 14% in value but only 0.4% in volume last year.

"It is illogical to impose 22% VAT on pet food and vet care, the same rate that applies to luxury goods," says ASSALCO's President Giorgio Massoni. Back in 2020, ASSALCO and the National Association of Italian Veterinarians (ANMVI) sent a letter to the Italian government asking for a long-term reduction in the VAT rate from 22% to 10% for pet food products, pet services and medicines.

An everyday essential in Germany

In Germany, pet food is considered an everyday consumer good and a VAT rate of 7% currently applies with the aim of reducing prices for the end consumer. The industry is keen to keep this reduced tax rate in place for pet supplies.

The German Pet Trade & Industry Association (ZZF) believes that pet food is an essential item. It warns that a higher VAT rate would make pet owners more likely to switch to feeding their pets more table scraps and homemade food.

Reluctance from policymakers

In Belgium, a recent proposal is calling to reduce the VAT on pet food from the current 21% to 6%. The federal government acknowledged that the cost of keeping pets had increased, but warned that a VAT reduction would benefit businesses rather than citizens.

"Pet parents will experience only a very small decrease in costs, while it will impose a heavy budgetary cost on the Federal Government," says Belgium's Deputy Prime

Minister Vincent Van Quickenborne in response to a letter from animal rights organization GAIA.

Meanwhile, in France, the Federation of Food Manufacturers for dogs, cats, birds and other pets (FACCO) proposed that the VAT rate on pet food should be lowered from the current 20% to 5.5%. However, the proposal, registered as part of the 2023's Finance Bill, was rejected in the Senate. Cutting the VAT on pet food products would have meant a loss of €420 million (\$459M) in revenue for the nation's finances.

The association now hopes to work on what it describes as the "best approach to resubmit the request within the framework of the Finance Bill for 2024", which will be discussed and approved by the end of this year. FACCO regards the issue as "more central than ever" and says that a reduction of the tax applied to pet food would help households cope with inflation.

Request falls on deaf ears in the UK

In April 2022, the UK welfare charity Dog's Trust asked the Chancellor of the Exchequer to remove VAT on veterinary services – including medicines – and pet food for a temporary period of 12 months. The letter, which was signed by 7 organizations, urged: "Removing the 20% VAT on pet food and veterinary-services costs could be critical to many pet owners at a time when interest rates as well as costs for energy, food and fuel have all rapidly increased." However, according to Nicole Paley, Deputy Chief Executive of UK Pet Food, the government showed no signs of revisiting VAT applied to pet food.

What is the real impact?

Experts agree that the impact of a tax reduction could be beneficial for pet parents in theory, but the reality might be different. James Hoverd, VAT associate at RSM UK, warns that businesses are also feeling the impact of the rising cost of living and high inflation, so pet food manufacturers and retailers could decide to use a reduction in VAT to increase their own revenue rather than passing the benefits onto shoppers.

"If the manufacturers and/or suppliers of the pet food choose to keep the same price even though there has been a reduction in the rate of VAT, then there would

be little benefit to end consumers. The result could therefore be that end customers would continue to pay the same purchase price, even if the applicable VAT rate was reduced," he explains in an interview with PETS International.

The cost to public finances

Since April 2022, EU member states have been allowed to apply a reduced rate of VAT – as little as 5% or even the zero rate – to pet food products, as they are considered products that cover basic needs. But as Hoverd points out, any changes in the VAT rate must be thought about carefully: "This will include consideration of the complexity in implementing the legislation, as well as the potential loss of tax revenue in the case of applying a lower taxable VAT rate to goods."

The European pet food market is currently worth around €39 billion (\$42.6B). Therefore, a reduction of the VAT rate for pet food to between 5% and 0% would suggest a cost to public finances of between €6.2 (\$6.75) and €8.1 billion (\$8.85B).

How long is 'temporary'?

Moreover, it is not clear for how long these temporary VAT reduction measures should remain in place. Nevertheless, there is a general consensus that they should last for a significant period of time. According to Hoverd, this allows for the benefits to "properly flow through the supply chains and be passed on to end customers".

"If a reduction to the rate of VAT on pet food is intended to support consumers through the current cost-of-living crisis, then a reasonable timeframe would appear to be one that aligns to expectations for when inflation and the economy will return to a more stable state," he concludes. ♦



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Retail sector has pet supplies in its sights

The role of supermarkets and hypermarkets in our industry is increasing. Are they becoming an essential part of the pet retailing ecosystem worldwide?

Pet ownership surged during the pandemic. This put the pet food and pet products sector in a strong long-term position, as those pets continue to be part of so many households. So it is little wonder that the major supermarket groups have sat up and taken notice.

Lucrative market

Younger owners, in particular, are keen to feed their pets with premium products. That's why the grocery groups have their eye on this lucrative market. It is an opportunity to leverage the fact that shoppers are in-store for food for both their family and their pets.

A recent study by Bloomberg Intelligence forecasted that pet food revenue worldwide is expected to

increase from \$320 billion (€300B) today to \$500 billion (€468.7B) by 2030. Bricks-and-mortar sales account for nearly three-quarters of pet spending, and while e-commerce won't outpace, the category will see a significant increase.

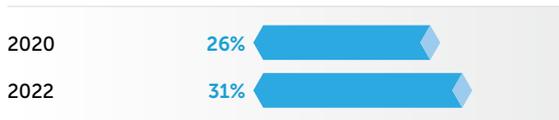
Opening pet stores

Italy is the country with the highest number of specialty pet stores in Europe – more than 5,900 in 2021, according to Statista. This accounts for around 14% of the pet food sector, and nearly 30% of dog and cat food is sold through supermarkets, says Italy's National Association for Pet Feeding and Care (ASSALCO).

Some of the big Italian supermarket chains have launched their own pet store brands. This includes Conad, with PetStore Conad, and Selex, which has the pet store brand Animali Che Passione.

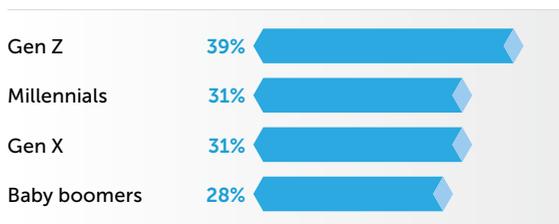
In the US, Walmart has recently opened its first-ever pet services center in Dallas (Georgia) where it offers different pet services – including [▶ SEE NEXT PAGE](#)

Dog food purchased in supermarkets (US)



Source: 2023-2024 APPA National Pet Owners Survey

Pet parents buying dog food in supermarkets (US, 2022)



Source: 2023-2024 APPA National Pet Owners Survey

veterinary care and grooming – under one roof. The retail corporation says it is eager to expand this model to other locations in the future.

Cross-category shopping

Meanwhile, the Bloomberg survey found that 27.5% of US respondents go to either Target or Walmart stores to purchase their pet supplies. No surprise, therefore, that both players have expanded their pet food sections recently, not least because shoppers are coming into stores more regularly amid the upward trends for frozen and refrigerated pet food.

“Since these foods are also more perishable than kibble, they could be another trend that drives even more shopping occasions. To take advantage of this increased in-store foot traffic, retailers should prioritize optimizing the in-store experience for both efficiency and discovery – with a focus on thoughtful merchandising that encourages cross-category shopping,” says Sarah Marzano, Director of retail strategy at Chicago-based market research firm Circana.

Capturing customers

The purchasing power of the large supermarket chains will also allow them to pass on savings to customers, and to run certain lines as loss leaders, given that they would expect to capture additional grocery sales once shoppers are in-store.

Reflecting this, in 2022 UK retailer Asda introduced a dedicated ‘pet zone’ at 4 of its stores. This was a trial featuring refrigerated fresh pet food, premium treats, accessories, toys, leads, collars and grooming products in a bid to help pet parents buy pet supplies as part of their regular weekly shopping.

27.5% of US pet parents go to either Target or Walmart for their pet supplies.

The idea is to include items in the assortment that would usually only be found in specialist pet stores.

Expanded product ranges

More recently, Asda has also partnered with a number of brands to introduce frozen raw pet food products, including Poppy’s Picnic, Wilsons Pet Food, Billy & Margot, and Nurture Them Naturally. It has installed frozen bays at 6 of its stores, while also offering pet supplements in a deal with pet supplement brand YuMove. According to the company, this marks a “significant milestone” in the evolution of Asda Pet Care.

Other supermarket chains have used pet offers as a marketing tool, with Aldi reintroducing a limited-time offer of dog-friendly ice cream at its stores in the UK this summer. The company claims that searches for #dogicecream had reached 31.8 million hits on TikTok alone ahead of the launch.

Investment in the category

The Woolworths Group supermarket chain in Australia went a step further, when it acquired a 55% stake in Petspiration Group for €375.3 million (\$408M) in June. Petspiration owns and operates the 276-store chain PETstock across Australia and New Zealand.

“Specialty pet is a large and growing retail segment in which we have limited presence,” Woolworths Group CEO Brad Banducci says. “The partnership will allow us to meet more of our customers’ pet family needs with a complementary range of specialty pet products and services, and to unlock opportunities across both businesses.”

What seems certain is that Woolworths will not be the last major supermarket group to target the pet food and supplements sector or to expand by acquisition. As they take on specialty retailers, expect the fur to fly. ♦



Mark Faithfull
PETS International Contributor



Germany, Austria and Switzerland

How is the pet industry doing in the DACH region? We present some facts and figures and a more detailed analysis of online sales in Germany. We also sit down with the largest European pet retailer, Fressnapf, for an interview.

Regional report: Germany, Austria and Switzerland
Pet online retail in Germany proves resilient
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Pet industry grows as pet spending holds up

Higher demand and increased competition are forcing existing and new players to develop innovative products and services.

Pet populations in Germany (D), Austria (A) and Switzerland (CH) – in short, the DACH region – continue to grow slightly. And despite the inflationary pressure, pet owners are sparing no expense when it comes to providing for their pets.

Household pet ownership stable

In 2022, Germany was home to an estimated 15.2 million cats, living in 24% of the country's households. This makes the domestic feline by far the most popular pet.

The latest data from the German Pet Trade & Industry Association (ZZF) and the Industrial Association of Pet Care Producers (IVH) shows that there were 10.6 million dogs last year, followed by 4.9 million small mammals.

According to Euromonitor, 45% of German households owned a cat or dog in 2022. The forecast for 2023 is that this remains stable, at 45.1%.

The numbers are very similar in Austria and Switzerland, with 44% and 42% of households owning a cat or dog. For this year, pet ownership levels are expected to remain flat in Austria and increase by 0.6% in Switzerland.

Pet food turnover on the rise

The German pet industry had a turnover of almost €6.5 billion (\$7B) in 2022, a significant growth from 2021's €6 billion (\$6.5B) mark.

Pet food made up the largest part of the turnover and the increased growth, accounting for nearly 8 out of 10 sales according to the ZZF and IVH.

In Austria and Switzerland, the same trend is being seen. "Basically, it has to be said that pet ownership – and pet nutrition – is an extremely stable and steady market," Bernd Berghofer, CEO of Austria Pet Food GmbH and Managing Director of the Austrian Pet Food Association (ÖHTV) told the Austrian journal *Die Ernährung*.

Pet food is one of the least likely categories that shoppers will spend less on. Despite seeing slightly more focus on the price of products, the industry in the DACH region does not expect any dramatic changes in the near future.

According to Euromonitor, the pet food market will grow by 7.6% this year in Germany. In 2022, the increase was 3.5%. The market is also expected to grow – although at a slower pace – in Austria (3.6%) and Switzerland (2.4%).



Pet food is one of the least likely categories that shoppers will spend less on.

However, its online sales are still significantly lower than those of its German online pet retailing competitor Zooplus.

Premiumization? Definitely!

The current trends in Europe’s biggest pet market and its 2 neighboring countries are similar to most other countries on the continent, with pet parents showing great interest in buying high-quality, healthy and ecologically sound food. Bernd Berghofer says that in Austria there has been a “massive trend” toward premiumization in pet food in recent years.

Examples also seen in Germany and Switzerland include regional sourcing, the use of local products in pet food formulation, and recipes with functional benefits such as a shiny coat.

Popularity of non-essential products

Accessories, healthcare and other non-food products have also become increasingly popular items on the shelves of pet stores, although their sales slightly declined in Germany last year.

Pet accessories are big business. The margins and gains in this sector are lucrative, as customers are prepared to pay high prices – their buying decisions tend to be based on emotional rather than rational choices.

Alongside clothing and home furnishings, accessories should also reflect the lifestyle of the pet owner. This is especially true for millennials, who make up 19% of all German pet owners. The same applies in Austria, according to analytical reports.

Specialized manufacturers such as Dogstyler are targeting these often affluent customers in a very competitive environment.

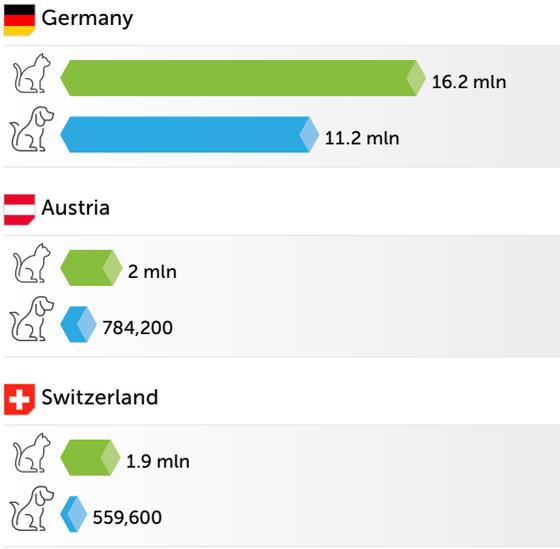
However, the statistics show that specialist pet trade outlets do still have most of the market share.

The role of sustainability

The attitudes of pet owners themselves have changed over time.

[▶ SEE NEXT PAGE](#)

Dog and cat population (forecast 2023)



Source: Euromonitor International

Big players

Europe’s largest pet retailer Fressnapf once again managed to increase its total sales in 2022 – by more than 11% to over €3.5 billion (\$3.8B). The German firm is the dominant player in its home market, with good prospects, and also has a strong presence in Austria and Switzerland.

Pet care market size (in €)	2022	2023 (forecast)
Germany 	5.56 bln	6.1 bln
Austria 	796.3 mln	824.1 mln
Switzerland 	694.4 mln	713.7 mln

Source: Euromonitor International

"People want to know more about the animals they keep at home, and have become more responsible when it comes to choosing their pets and taking care of them. Sustainability has grown greatly in importance over the years," says Antje Schreiber from the ZZF. According to her, this is also reflected in the increase in personalized services offered by pet shops and tailored to each pet's needs, routine and diet.

The increasing importance of sustainability has led to mounting pressure on businesses to respond. "Many companies have no alternative but to develop new products and services if they want to keep ahead in the market," Antje Schreiber points out.

Facing pressure from disruptive business models, some players are going in new directions and trying to accelerate innovation to address consumer needs and future challenges.

Optimism for the future

Looking to the future, industry representatives are cautiously optimistic. Despite high inflation, dog and cat owners seem to be still willing to spend on their pets and this will create new business opportunities. On the other hand, price increases for electricity and gas, as well as for raw materials due to the war in Ukraine and its economic consequences, are directly affecting the pet food sector in the DACH region. And there might also be operational drawbacks caused by labor shortages. ♦



Alexander Welscher
PETS International Contributor



Mera Tiernahrung GERMANY Mera nourishes relationships

Founded in 1949 in Kevelaer in the Lower Rhine Region, the German family-owned company Mera Tiernahrung works every day to develop dog and cat food that is perfectly tailored to the needs of animals and their owners.

At its production facility in Kevelaer, Mera produces more than 70,000 tons of dog and cat food annually, making it one of the most successful manufacturers in the premium sector.

The company also sells its high-quality, locally and environmentally friendly produced food internationally. Therefore, personal exchange with international partners in sales, export, purchasing and marketing is particularly important.

"Together, we can inspire dog and cat owners to create fulfilling relationships between people, animals and the environment," says Mera CEO Felix Vos.

MERA Tiernahrung GmbH
info@mera-petfood.com
mera-petfood.com/en



Private label in premium quality



Premium wet pet food made in Germany: Seitz has been a manufacturer of high-quality pet food for dogs and cats for more than 40 years. Species-appropriate nutrition, natural ingredients, innovative product concepts: As a development partner of the specialised trade, the company from Langwedel near Bremen creates the conditions for market success.

Full service for development, design, logistics

From product development to logistics, Seitz customers receive a complete package of services for the realisation of private labels. Modern production facilities and an experienced team of experts ensure the high-quality production of pet food products. The logistics behind it: fast, reliable, efficient.

Originally founded as a barf pioneer, Seitz today stands for uncompromising demand for quality runs through all product areas. Only the best raw materials are used in the preparation of dog and cat food: Fresh meat, vitamin-rich vegetables, freshly harvested ingredients. The products are processed gently and in accordance with the strict specifications of the FEDIAF and the recommendations of veterinarians. They contain neither preservatives nor synthetic additives. The processes are certified according to IFS.

300 recipes, innovative concepts and much more

Customers can choose from more than 300 recipes or customise their product

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The service is comprehensive: cans (200g, 400g and 800g) and sausages (40g-1800g) are produced - labelled ready for distribution, boxed ready for dispatch and stacked on Euro pallets.

Anyone who wants to participate in the growth of the pet food market with their own brand will find in Seitz an experienced partner who implements customer wishes individually, personally and purposefully.

The most important facts at a glance:

- Premium pet food „Made in Germany“
- Specialist for wet pet food in cans and sausages
- IFS-certified
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- More than 40 years of experience with pet food
- Wide range of whole meat recipes in cans and sausages
- Tailor-made product development with veterinarians and nutritionists



Do you want to create a successful private label? Your contact at Seitz is

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27299 Langwedel
Germany

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D.schneider@seitz-tiernahrung.de



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Kräuter Mix GmbH
 petfood@kraeuter-mix.de
 kraeuter-mix.com



Pet online retail in Germany proves resilient

German online pet supplies business emerged successfully from the pandemic. And despite increased inflation and reduced consumption since last year, there is still optimism for the future.

In the first 6 months of 2023, online sales value of pet supplies in Germany was €1.06 billion (\$1.15B). This is a decline of 5.8%, compared to the revenue of €1.13 billion (\$1.24B) in the same period in 2022. Online sales for the whole of last year accounted for €1.86 billion (\$2.01M), with the decline in sales revenue becoming apparent in the third and fourth quarter.

In the long term, however, online sales of pet supplies do appear to be resilient despite the current crisis. The market has grown by 51.5% since the outbreak of the pandemic at the beginning of 2020. This compares favorably to other major industries, such as fashion retail, which has seen all the revenue gains from the pandemic wiped out.

Downward trend ... or not?

After experiencing high growth during the peak of the pandemic, German online retail is currently in a

Online pet supply sales in Germany (in €)

2021	1.75 billion
2022	1.86 billion
2023 H1	1.06 billion

Source: Bundesverband E-Commerce und Versandhandel Deutschland (bevh)

consolidation phase. This started with a major setback in 2022 – after the war broke out in Ukraine.

For the first time since data collection began, the gross turnover of goods online fell last year, declining by 8.8% to €90.4 billion (\$97.6B). And that was just the beginning. For the first half of 2023, accumulated sales online were approximately 13.7% below the comparison value of 2022, indicating that rock bottom has not yet been reached.

That said, it is too early to mourn the loss of online retail, especially when compared to bricks and mortar. While traditional retail has yet to make up for its pandemic losses – according to the Federal Office of Statistics – with revenues still lower than in 2019, overall online retail turnover is up 14.7% for the same period.

Thinking ahead

There is good reason why the pet supply industry is faring better online than other sectors during the current crisis. While most online retailers are now focused on cutting costs and re-evaluating business channels, many pet specialists are massively expanding their investments, preparing to gain further market share once consumer sentiment brightens again. ► [SEE NEXT PAGE](#)

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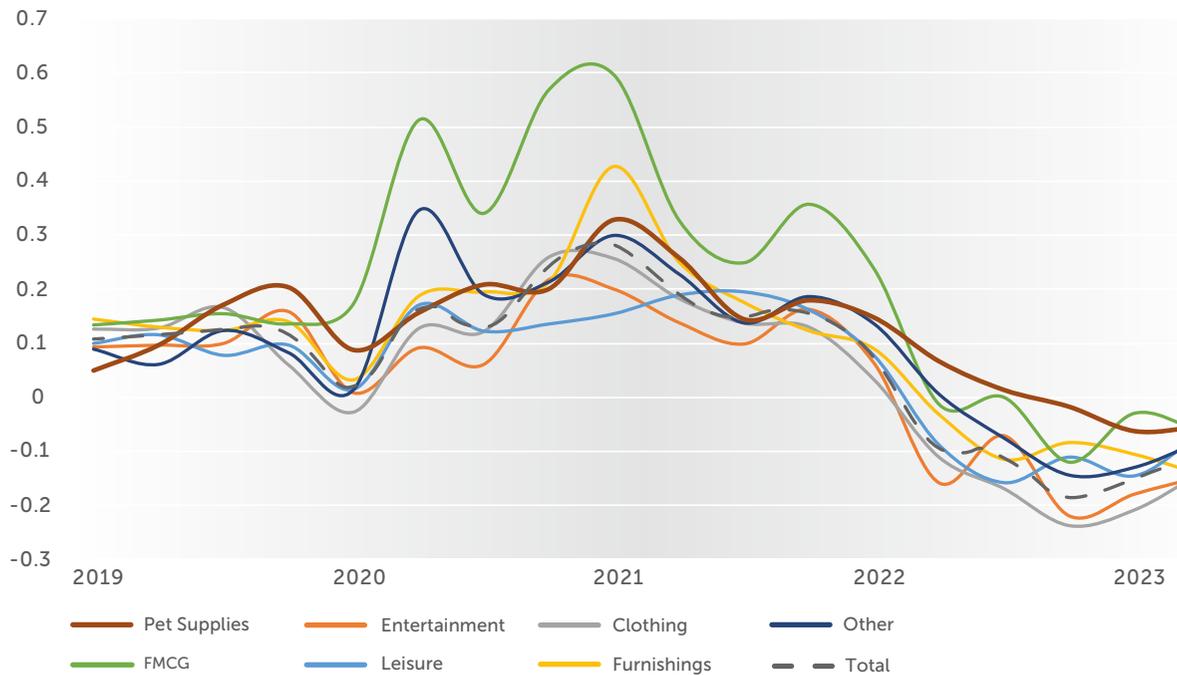
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Contact us at: contact@fihumin.de | www.fihumin.de

Quarterly change in sales compared to the same quarter of the previous year



Source: Bundesverband E-Commerce und Versandhandel Deutschland (bevh)

Taking customers from grocery retail

Pet food in Germany is still primarily sold through traditional grocery retail, with revenue in the channel accounting for 62% of the market, according to the Industrial Association of Pet Care Producers (IVH). But pet supplies are generally considered niche products in this area of retail. The only exception is Germany's third largest grocery retailer Rewe, which has experimented with specialized pet stores under the brand ZooRoyal.

Online retailers have gratefully filled this gap in the market in recent years, gaining more and more customers with extensive and specialized product offerings via their online shops.

From online seller to care provider

Since the peak of the pandemic, some online retailers now realize that it is no longer sufficient to offer pet owners merely an alternative distribution channel alongside bricks-and-mortar stores. The idea gaining ground is that their best competitive edge is not a wide range of products or fast delivery – it's data.

Retailers such as Fressnapf have started to demonstrate how that's done: by linking, for example, a customer account with a wearable device like a GPS tracker for a dog or cat, the pet owner can not only monitor their pet's movements and activities, but also have round-the-clock in-app access to a veterinarian, who can then see the pet's latest health data.

An example like this shows the efforts being made to transform traditional sellers of pet food and other pet supplies into data-driven ecosystems for pets. To continue growing in the market, a seller evolves into a 'care provider' for all aspects related to their customer's pet. This helps them to lure customers from supermarkets to their online platforms, and gives them the opportunity to grow despite the negative market trends. ♦



Frank Düssler
Press and Public Relations Officer
Bundesverband E-Commerce und
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Cutting-edge tools from a century-old corporation



Manufactured by a company with a rich history, WAHL and MOSER clippers and trimmers are still pet grooming favorites.

While many people in the pet grooming and coat care industry are familiar with the names WAHL and MOSER, they may not fully grasp the extent of their connection. At the heart of this relationship is the German company Wahl GmbH, a leading manufacturer and distributor specializing in electric hair clippers and trimmers for both humans and animals in Europe.

A first in the US

Wahl GmbH is a subsidiary of the US-based Wahl Clipper Corporation. The company was founded in 1919 in Sterling, Illinois, by Leo J. Wahl. He was also the inventor of the electric clippers with the first US patent.

MOSER was founded in 1946, and since 1976 it has a dedicated line for animal clippers. Wahl Clipper Corporation bought the company in 1996, taking over the brand and production. Over the years, the MOSER Animal brand has become well-known and favored by home users, and can now be found at major pet retail chains across

Europe. Its unique test station concept allows end users to experience, test and compare the whole range of easy-to-use clippers, trimmers and coat care accessories at the point of sale.

Professional standards

The WAHL Professional line further solidifies the company's position as a provider of grooming solutions. Designed to meet the standards of professional groomers and veterinarians, the brand encompasses clippers and trimmers tailored to various areas of application.

At the core of Wahl GmbH's success lies its state-of-the-art manufacturing facility located in the Black Forest region in the southwest of Germany. In 2022, all the company's production and administration units moved to a brand-new building a few kilometers from the original location. Besides the modern premises and equipment, the plant benefits from a skilled workforce and a culture of craftsmanship,

which contributes to the precision engineering of each product. The blade sets, in particular, are the forte of the site.

Preferred brand

The Wahl network has contributed to the significant impact it has had on the international grooming market. With its 6 production facilities and numerous subsidiaries worldwide, the corporation's products have earned trust and recognition from professionals and consumers alike.

Building on past and present achievements, the company is committed to expanding its market presence and reinforcing its position as the preferred brand with the ideal tools to address any hairy problems that pets, their owners, groomers and vets may encounter. ♦

Wahl GmbH
info@wahlgmbh.com
wahl.com



How is Europe's leading pet retailer doing on its home turf?

We asked Fressnapf's Dr. Johannes Steegmann (CEO) and Jochen Huppert (Country Manager Germany) for an update on the European pet retailer's performance in the DACH countries: Germany, Austria and Switzerland.

Fressnapf is in the midst of a transformation. On stage at the GlobalPETS Forum almost 2 years ago, CEO Johannes Steegmann unveiled Fressnapf's plans to develop its ecosystem in an effort to become a true 'caring' partner.

Here, together with Country Manager Germany Jochen Huppert, he reflects on what the European pet retail giant has been doing since then and looks ahead to the future.

How is your ecosystem rollout going?

Steegmann: We've made terrific progress, and the biggest transformation in our company's history is going well. We've introduced new services like Fressnapf GPS trackers, digital insurance solutions, subscription boxes and more. By October this year, 80 stores will have our new store format.

Huppert: That new store format is key in telling the story of our new offering within the ecosystem. Our previous store format has been great at helping customers find the products they need. But to truly capitalize on our role as advisers and partners, this new format really opens doors for the ecosystem and helps educate consumers on new initiatives.

What have been the challenges?

Steegmann: Some massive developments on the data and technology front were needed to bring everything

together. We've also opened new logistics hubs. But the biggest challenge for our customers has been inflation and rising prices. While we've given up some of our margin to protect consumers, eventually we were also forced to increase our prices.

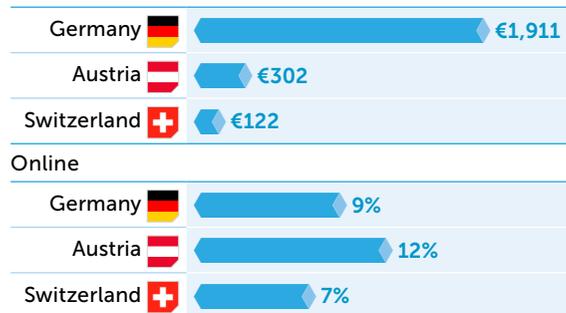
Now that prices of raw materials have started falling, we're working closely with our suppliers to reduce prices again. First of all, we've started decreasing prices of many products in Poland, and this October we'll also announce a big price drop in Germany.

Tell us about your 'Friends' program

Steegmann: A central part of our ecosystem is our app-based loyalty program, called 'Friends'. We've rolled it out in Germany, Austria, France, Poland and Belgium, and we can see that it now accounts for more than 50%

2022 Sales in DACH

Total sales (in million €)



Source: Fressnapf

Number of stores	2023	2026 (projected)
Germany 	941	1,020
Austria 	133	137
Switzerland 	67	85

Source: Fressnapf

of our revenue across our e-commerce and bricks-and-mortar stores.

What about online sales?

Huppert: Right now, online sales account for 9% in Germany, 7% in Switzerland and 12% in Austria. While our e-commerce sales have tripled since 2019, online is still a growing segment, especially for basic products like toys or treats.

However, our bricks-and-mortar presence will remain key in giving customers the guidance they want and serving them wherever they prefer in the moment.

How are your private label products doing?

Steedmann: Our exclusive brands are always very important. In fact, they are the biggest sellers in every country. And especially in these challenging economic times, it's no surprise that good quality at a good price is becoming increasingly popular.

We plan on increasing the share of exclusive brands to over 50% because we know how important they are. Moreover, private label products are a good way to attract customers to Fressnapf and to keep them in our ecosystem.

Are cats or dogs more popular in the DACH region?

Steedmann: When our in-house market research team compares pet owners in DACH to other countries, we see that there are more cats than dogs in these markets. For example, cats account for 70% of pets in Switzerland and 58% in Germany, plus Germany has the highest number of indoor cats (50% of all cats). In comparison, 76% of pets in Poland are dogs.

What else is special about pet owners in the DACH region?

Steedmann: Another interesting insight is that pet owners in DACH love to mix wet and dry food more than owners in other countries, and they are more likely



Johannes Steegmann



Jochen Huppert

to buy wet food. Therefore, our stores and offerings in the DACH region should reflect those differences. For example, we've introduced a meat corner because we saw that they are big fans of BARF: biologically appropriate raw food.

How do you view the 'competition' with supermarkets?

Steedmann: We believe strongly in the premiumization trend among our customers. As pets are increasingly seen as family members, more and different products will be needed – such as advice and special products for seniors, for puppies, allergies, diets and so on. That's where we have an edge over supermarkets, so we think the premiumization trend will automatically bring a lot of new customers into specialty stores like ours.

Where do you see future growth opportunities?

Steedmann: Because Fressnapf is already a strong market leader in Germany and Austria, we intend to drive more expansion in Switzerland with a relatively bigger number of store openings.

Huppert: Germany will remain our biggest market. Nevertheless, we still have the potential to improve and grow here too. We are already world-class in the dog category, but we can still become even better in the cat category. And there are some interesting opportunities for wet and dry food, as well as snacks. ♦



Philippe Vanderhoydonck
Managing Director
GlobalPETS

Navigating the global pet care landscape

In the increasingly competitive industry of pet care, where brands jostle for attention and trust, Spectrum Brands stays committed to its mission of improving the lives of pets and those who care for them by continuing to expand its diverse portfolio of products that cater to companion animals' needs.

With an array of well-known brands in its portfolio, Spectrum Brands (Spectrum/SPB) has carved a niche that extends across continents.

Brand groups

Spectrum Brands Holdings, Inc. (NYSE: SPB) boasts a broad array of brands, each with a unique identity and set of offerings. Although Spectrum owns brands in categories in the Home & Garden and Home & Personal Care business units, it is the Global Pet Care unit that has made its way to the forefront of the firm's corporate identity. From the aquatic expertise of Tetra to the fur-fighting prowess of FURminator and the nutritional focus of IAMS and EUKANUBA, the company's aim is to provide a portfolio that spans nearly every pet care segment.

Global reach

Spectrum's geographic reach extends across North and Latin America, Europe,

Middle East & Africa (EMEA) and Asia Pacific (APAC), with nearly 40% of its global sales contribution coming from EMEA and APAC. The pet care organization has local offices in key markets including the United Kingdom (UK), the Netherlands, France, Poland and Germany. In the latter, the town of Melle is home to Spectrum's largest European manufacturing site and international headquarters, with a workforce of nearly 400 employees.

Catering to regional nuances

Spectrum is uniquely committed to understanding and catering to the specific needs of different markets. Rather than imposing a one-size-fits-all approach, the firm blends global expertise with a nuanced understanding of regional priorities and preferences. Navigating the pet care landscape in Europe, for example, demands an understanding of local sensibilities and preferences. This adaptability is a cornerstone of the company's success,

allowing it to forge genuine connections with pet care professionals and customers around the world.

In Germany, as an example, Tetra GmbH reigns as an emblem of aquatic innovation and expertise. With over 70 years of experience, Tetra has not only evolved with the aquatics category but has played a pivotal role in shaping it. Germany is therefore home to Spectrum's Global Center of Excellence for Aquatics. There, Tetra's research and development teams perform more than 13,000 expert analyses per year, all conducted within the organization's own laboratories which are the largest in the industry.

Moreover, Tetra owns roughly 200 active patents. This further solidifies the organization and the brand as a beacon of knowledge and innovation, enhancing the experience of fish keepers and enthusiasts around the world.

Sustainability and packaging

Most recently, Tetra announced the launch of new, sustainable packaging for its fish-food products, including Pond, TetraMin, Repto and Goldfish. The 500 ml and 1-liter tins are made of 100% post-industrial recycle (PIR). These fully recyclable tins are not just a novelty for Tetra, but also for the aquatic industry as a whole.

“This was a joint effort between our own teams and our long-term partner in packaging, SPIES,” says Janina Garving, Senior Brand Manager at Tetra. “By reusing the raw material, we are able to save up to 85 tons of plastic per year while continuing to provide high-quality products in functional packaging. It’s another great milestone on our sustainability journey.”

The new PIR packaging is one of the first major steps for the newly founded Sustainability Council at Tetra, the aim of which is to drive, supervise and control all activities connected to the brand’s path toward a sustainable future. The organization’s ongoing investment in research and development, in addition to its renewed focus on sustainability, has reinforced Tetra’s position as the No. 1 fish-food brand in the world.

Cats and dogs

Spectrum’s influence in Europe is not limited to the aquatics category, however. Needless to say, the company’s presence also extends to dogs and cats. In this segment, it focuses on main-meal dog and cat food with brands



like IAMS and EUKANUBA, as well as snacks and treats through brands like 8in1 and Good Boy. The latter is currently the No. 1 dog treat brand in UK grocery and has been listed as a Top 100 brand by the UK-based trade magazine *The Grocer*. These brands stand as pillars of nutritional excellence, catering to the discerning tastes and health needs of pets across Europe.

Raising the bar

Spectrum’s journey has not been without its challenges. For instance, keeping up with the ever-changing regulations of various European Union countries – specifically for packaging, as one example – is not for the faint of heart. The company has recognized the reality of today’s constantly evolving marketplace, and prides itself on its speed to market, agility and willingness to embrace change – not merely to stay ahead of the game, but to consistently raise the bar of what quality pet care entails.

Partner of choice

In a world where pets are cherished members of the family, Spectrum strives to be the partner of choice in the global pet care landscape. For retail customers and

pet care consumers alike, the company remains committed to enhancing pets’ lives through a broad product portfolio. From the aquatic categories expertly led by Tetra to the nutritional realms enriched by IAMS and EUKANUBA, Spectrum’s adaptability, innovation and dedication are key ingredients in the company’s success.



Through sustainable packaging initiatives and tailored approaches for international regions, the company demonstrates its capacity to navigate challenges and set new standards. With every product developed, every connection forged and every tail wagging in delight, Spectrum reaffirms its role as a leader, a friend and a guardian of beloved companion animals. In embracing change, fostering well-being and advancing the pet care industry, Spectrum Brands paves the way for a brighter, more caring future. ♦

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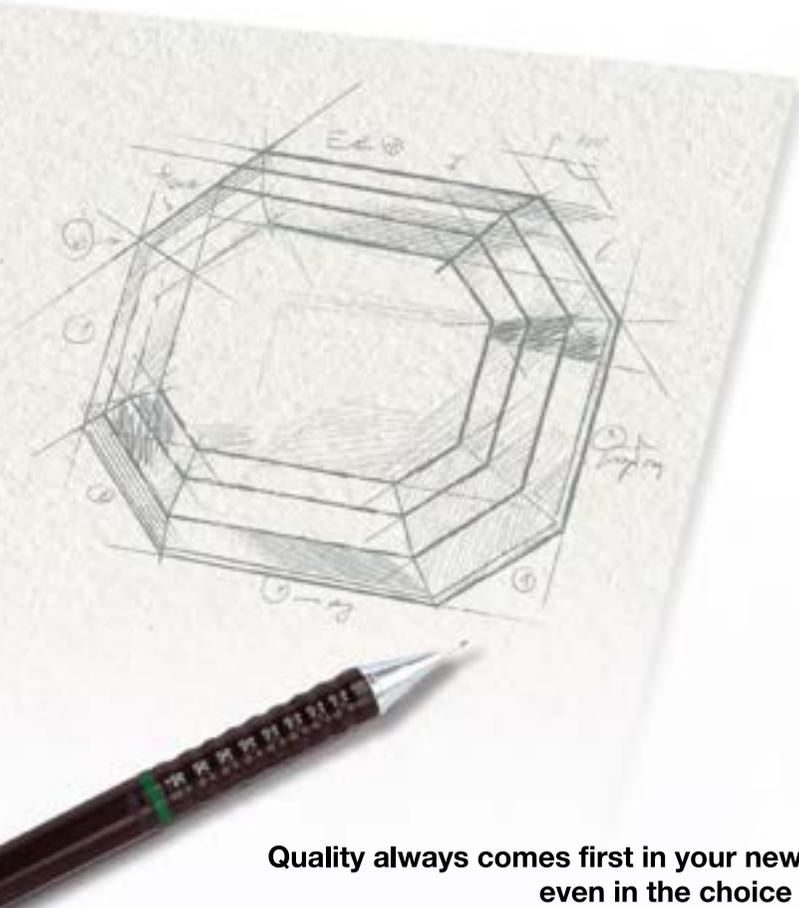
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