



PETS International

part of  GlobalPETS

Since 1988 | February 2021

Sustainable food and Pet supplies

Aiming for a fully sustainable pet lifestyle.

Ingredients and Production

Towards greater sustainability in sourcing and production.

Global pet industry

Effects of the pandemic on a recession-resistant industry.





- Specializing in manufacturing FD pet food for more than 10 years. Most recognized FD pet food manufacturer in China.
- Your reliable OEM & ODM partner.
- Over 300 kinds of FD pet treats and 20 kinds of FD complete pet food formulas available for private label.



- Top grade raw material.
- No additives.
- Maximum nutrition retention.
- High palatability.



Highlights this issue



8

Sustainable food and Pet supplies

Pet owners increasingly expect companies to be sustainable in every aspect: design, ingredients, production and packaging. What can owners do themselves to reduce the environmental impact of pet ownership?

Ingredients and Production

Greater sustainability in sourcing and production has its challenges. From the use of alternative proteins, by-products and wild ingredients, to global versus local sourcing – pet food manufacturers seeking to reduce their carbon footprint have a lot to consider.

30

 AKER BIOMARINE



48

Global pet industry

The pandemic has influenced the pet industry worldwide. But not all for the worse. Pet adoptions are up, e-commerce shopping is flourishing, and online-initiatives thrive. The pet industry seems more resilient than other sectors.

And further in this issue

Editorial	3	Calendar of events Contact us	61
Upcoming issue	5	Advertisers index	62
Pet industry highlights	6	Colophon	62



PET NUTRITION ENGINEERED TO MAKE YOUR BRAND STAND OUT

Bespoke premix
Independent technical support
NPD
Ingredients

More than just premix

For further information on how
we can work with your brand
please contact

INFO@PREMIERNUTRITION.CO.UK
PREMIERNUTRITION.CO.UK

PREMIER
NUTRITION

New year, new opportunities!

2021 has started with the hope that the availability of COVID-19 vaccines means that our lives can go back to how they were. But it is a race against time – and against virus variants. Even if all goes well, it will be at least autumn before 70% of the global population is vaccinated. There are still huge implications for our industry, including the exhibition calendar. Global Pet Expo has announced that the Orlando show (24-26 March) is going digital. And what will happen with Interzoo? We do have positive news too. Pet industry turnover is likely to increase again in 2021, with many companies expecting double digit growth!

The COVID situation will continue to have an effect on sustainable practice. That includes local sourcing and vegan trends, so this issue is packed with information on those developments. Travel restrictions have severely impacted supply chains, and supply chain vulnerability has already made us think differently about sourcing. We expect to see a combination of local and global sourcing to meet the need for high quality products. Increased sustainability and transparency demands will further drive local sourcing.

2021 is the International Year of Fruit and Vegetables. There is increasing consumer

demand for natural and healthy plant-based products. This is crossing over into the pet market too, so there is no better time for manufacturers to benefit from integrating fruit and vegetables into pet products.

A sustainable mindset can be seen in all aspects of pet ownership. This starts with an 'adopt, not buy' approach to choosing a pet. And as consumers become more discerning, 'Made in...' no longer guarantees a product's quality or sustainability for them. So the geographic location of a manufacturer's production activities is now largely irrelevant.

The sustainability factor needs to be taken seriously from the earliest design stage. Everything matters: from raw materials to the labour employed, from suppliers to the distribution network – right up to the company's ethical commitment, which often includes allocating a percentage of the profit to global sustainability projects.

Welcome to new opportunities in 2021!



Corine van Winderen, CEO



[@GlobalPETSinfo](#) [GlobalPETS Community](#)



Food dreams?

Turn into reality with our products!



... e.g. with our **cold-pressed** recipes

- Made without additional heat
- Pressed with a special cold press machine
- Natural vitamins and minerals are retained
- Natural food smell
- grain-free recipes possible

Premium Private Label Petfood

As a leading manufacturer of premium private label dry food, we develop innovative and sustainable recipes, products and marketing solutions. Fihumin GmbH is your full service partner – from the initial idea through to products ready for sale. Benefit from our long years of international experience, innovative recipes, state-of-the-art production facilities and a highly motivated team. We can produce the following for you:

- **Conventionally extruded complete foods**
- **Cold-pressed complete foods**
- **Complete foods with fresh meat**
- **Grain-free complete foods**
- **Complete foods with insects**
- **Veterinary diets**
- **Vegetarian complete foods**
- **BARF supplements / mixtures**

Fihumin  **Gesellschaft**

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



Supplement market
Proteins and
Rendering
Claims and Registration

Fresh and Frozen
Herbs, fruits and vegetables

German-speaking countries

Accessories Pet-friendly materials
Recycling materials Brick-and-mortar and online channels
Online exhibitions and conferences

April issue | Advertising deadline: 5 March 2021 | Publication date: 2 April 2021

Contact head office (see page 62) or local representatives (see page 61).

Pet industry highlights



Global Pet Expo
24 to 26 March 2021
Online
globalpetexpo.org

For the latest event information check:
globalpets.community/events



Interact with us and find news
✉ info@globalpets.community
🐦 @GlobalPETSinfo
🌐 globalpets.community
🌐 GlobalPETS Community

Correspondence may be edited for clarity or length.

Fressnapf Group celebrates 30th anniversary with vigorous growth

The Fressnapf Group ended its anniversary year 2020 with an annual turnover of more than €2.5 billion (\$3 billion). In all of its eleven countries, and in all channels, it achieved significant double-digit growth compared to the previous year.

The most important growth driver of the past year was the online channel. With an increase of 45%, its ambitiously planned target was clearly exceeded. "Unbelievable, that we achieved all our goals – and more – for this anniversary year during such a crisis. In 2021, we will continue to be aggressive in both our offline and online strategies in all the countries, while at the same time consolidating our position in the industry. We are planning over 100 new locations plus additional webshops. At the turn of the year we took over our Danish competitor Petworld, with 36 locations and online shops," says Torsten Toeller, founder, owner and chair of the board of directors of the Fressnapf Group.



Global Pet Expo moves to fully-digital experience

The planned Global Pet Expo for 2021 will take place in a digital format between 24 and 26 March. This was announced at the end of 2020 by the American Pet Products Association (APPA) COO and Executive Vice President Andy Darmohraj, amid continued safety concerns resulting from the global pandemic.

Global Pet Expo Digital Access is open to independent retailers, distributors, mass-market buyers, and other qualified professionals (buyers).



Vobra Special Petfoods opens a new factory

The Dutch company Vobra Special Petfoods is expanding its operations with a new factory next to its existing factory. This will increase the company's production capacity by 50% and create more opportunities to meet the rapidly growing global demand for its dog and cat food products. The new factory will employ state-of-the-art production technology and will also enable the company to package its products in smaller quantities.



Pet industry highlights

Gordon Bonnet appointed new managing director of ZZF and WZF

The directors of the German Pet Trade & Industry Association e.V. (ZZF) and the supervisory board of WZF (organiser of Interzoo) have appointed Gordon Bonnet managing director of the association and its subsidiary WZF, effective from 1 January 2021.



The 47-year-old lawyer, business mediator and journalist originally worked as a press officer for the Frankfurt chamber of industry and commerce, before spearheading communications at Wiesbaden's chamber of industry and commerce and taking a seat on their management board. Mr Bonnet was also involved with bodies connected to the Association of German Chambers of Industry and Commerce in Berlin. In his last position, he was a member of the management board at a creative agency that focused on live communications and creative consulting.

Ferplast S.p.A. takes over Marchioro Sas

Ferplast has officially acquired Marchioro Sas from the Marp Srl group, a long-established family-run business specialised in the production of garden and pet items. With this significant acquisition, Ferplast adds equipment and moulding technology to its business that will be of great value.

The investment is a strategic move that is of vital importance to the company. The production facility can contribute to the already substantial manufacturing currently divided between three plants in Italy, Ukraine and Slovakia, allowing Ferplast to increase its offer with new designs and new solutions for pet care. With the acquisition of this quality machinery and moulds, the company is set to become the largest manufacturer of pet care items in Europe.



Beeztees: winner of the GlobalPETS Forum Award 2021

The winner of the annual award is usually announced at the GlobalPETS Forum. Although COVID-19 made it impossible to organise this year's Forum, the positive news is that the GlobalPETS Forum Award 2021 is going to the owners of Beeztees: Job and Guusje van Riel.

Beeztees, that also owns the Karlie brand, was originally a distributor; a distributor who made a timely change to their strategy by developing a wide product range with a distinct, unique design under an own label brand. Their goal was to become the first brand for non-food pet accessories. The basis of their brand strategy is creating 'happy moments' for the pet and the owner. These happy moments are linked by positioning the brand in the consumer's mindset. It is a strategy that can be adapted to each target group, type of distribution channel and retail concept. In other words, a strategy that translates to both the b-to-b and b-to-c sectors of the pet industry.

An interview with the winners about their brand strategy is available for viewing at:
globalpets.community/globalpets-forum-award-2021







Sustainable food and Pet supplies

Pet owners are increasingly demanding greater sustainability from manufacturers. This section provides useful pointers – from why the time is ripe to integrate fruit and vegetables into pet food, to how to incorporate sustainability into product design. Help is also at hand from PSC, which is organising an online event this February to address the issue of packaging and sustainability.

2021: The International Year of Fruit and Vegetables	10
Sustainability by design	12
Homemade diets for pets: better or worse?	14
Josera GERMANY	17
De Haan Petfood THE NETHERLANDS	19
Sustainable pet ownership	21
Pet Sustainability Coalition advances sustainable packaging leadership	24
Max Major CHINA / BELGIUM	26
Bogar SWITZERLAND	27
Emgee Trading BELGIUM	28
Sustainable ingredients sourcing: a re-think?	29



2021: The International Year of Fruit and Vegetables

Why this year is the ideal time for manufacturers to benefit from integrating fruit and vegetables into pet products.

Mainstream

In combination with the rise in consumer demand for more natural products for people and their pets, the human health trend of eating more fruit and vegetables is crossing over into the pet industry. In fact, it is driving demand for pet food containing fruit and vegetables. Many manufacturers have been including fruit and/or vegetables in their pet food products for years. As ever-more consumers perceive them as regular functional ingredients in many food products for dogs and cats, this presents interesting opportunities for producers.

Advantages and challenges

"The specific advantages of certain fruit and vegetable ingredients in pet food include nutritional value, health aspects, taste, sustainability and marketing aspects," said Guus Boon, a trader at Meelunie. "However, using fruit and vegetables as pet food ingredients is not without its challenges. For example, it can be

more difficult to control feed safety with regard to contamination and spoilage, and the drying costs can be higher because fruit and vegetables can increase the water content." Nevertheless, there have been significant advances in the methods and technology involved in processing fruit and vegetables for pet food applications.

A healthy future

When integrated skilfully, fruit and vegetables already have proven value in pet food applications, and demand for them is likely to rise further in the future. "Everyone wants healthy food for their pets," commented Dirk Coremans, a nutritionist at Duynie. "Fruit and vegetable ingredients contribute to well-balanced and high-quality nutrition. They are a good source of fibre, minerals and vitamins and offer health benefits. Fruit and vegetable products will become more and more important in the pet market in the future."



Focus on sustainability

However, some consumers may question the sustainability of all ingredients, which is why the emphasis has now shifted to further improving the sustainable use of such ingredients.

“Many pet food ingredients are derived from waste streams in the food supply chain. This contributes to sustainability, but there are still many other potentially valuable waste streams, and a significant number of them involve fruit and vegetables,” stated Guus Boon.

“Our fruit and vegetable ingredients are made from plant-based co-products sourced directly from the food industry. Therefore, we enable maximal resource use and help prevent food loss,” explained Dirk Coremans. “All products are dried using residual heat and renewable energy instead of fossil fuel. Life cycle assessments (LCAs) have proven that the environmental impact of our ingredients is lower, because they have a lower impact on land use and a smaller carbon footprint than alternatives on the market.”

“We expect to see significant growth in the production of pet food ingredients from fruit and vegetables driven by their added value in pet food recipes (nutrition, health, palatability), by sustainability requirements and by improved handling technologies,” added Guus Boon.

A year of opportunity

With the coronavirus pandemic still affecting most of the world, the stronger emphasis on maintaining health and optimal immunity at home through healthy eating has been extended to pets as well. Additionally, the UN has declared 2021 the International Year of Fruit and Vegetables, aimed at raising awareness of the benefits of fruit and vegetables in terms of nutrition, health, food security, income/employment and sustainable farming and production – so there is no better time for manufacturers to benefit from integrating fruit and vegetables into pet products. ♦

How to incorporate fruit and vegetables into products more holistically

- Study the latest scientific research into the benefits of fruit and vegetables in human and pet food formulations
- Stay up to date on technological developments in fruit and vegetable processing; they might offer benefits in improving sustainability
- Contribute to national and international discussions and forums on fruit and vegetable products and sustainability
- Regularly review sustainability in your own supply chain
- Build consumer awareness of the benefits of fruit and vegetables in pet food



Sara Sharpe

sara@thecreativepractice.com
thecreativepractice.com



Sustainability by design

Companies are increasingly expected to take a leading role in designing sustainable products.

Take the lead

Ecology and sustainability have become of primary importance, both for companies and for consumers. If the responsibility for the choice previously lay almost exclusively with the end user, today companies are increasingly expected to take the lead in designing sustainable products. Numerous 'green' materials enable them to meet pet owners' sustainability needs.

A real need

What was considered a trend has in fact turned into a real need. Maintaining consistency with the principles of sustainability extends through the entire chain of the design and production process and involves all parties: from the producer to the consumer. Offering consumers a choice of sustainable products requires companies to be proactive.

Sustainable mindset

The sustainable mindset is becoming more prevalent in every aspect of life with a pet. Even right from the

start, when choosing a young pet (or more often an adult one), people are increasingly taking an 'adopt, not buy' approach. Living sustainably and ecologically is a lifestyle shift that involves owners, pets and the social context, entailing complex dynamics. For companies, the geographic location of their production activities is largely irrelevant nowadays. 'Made in...' is no longer an automatic indication of a product's quality or sustainability; markets have become more discerning.

Green materials

From food to hygiene and from toys to kennels, there is no style without substance. Sustainable options can be based on non-toxic products made from 'green' (for example, organic, renewable or recycled) materials. For instance, starting with the basic pet needs, bags for dog droppings can be made from biodegradable polymers, and cat litter can be made from vegetable fibres which guarantee zero-impact disposal. Other sustainable products include sleepers made from bamboo fibre and eco pads for use during puppy



BACTERFIELD®
NATURE AND SCIENCE IN BALANCE



training. Pet toys made from wood, fabric or rope are enjoying ever-greater success, and there is growing interest in scratching posts and cat trees made from cardboard and natural fibres, combining the need for play with materials that pets find instinctively pleasing.

Manufacturers can limit the use of synthetic chemicals by switching to pesticides that exploit the qualities of essential oils or vegetable surfactants for hygiene and cleaning. To comply with the principles of sustainability, producers should avoid unnecessary packaging and plastic as much as possible and should use recyclable cardboard or mono-material packaging; ideally that is also designed to be converted into kennels or litter boxes.

Everything matters

Consumers' sustainable choices are based on a specific motivation that is not open to negotiation and should not be ignored. Manufacturers should take the sustainability factor seriously right from the early design stage. It is important to remember that everything matters: from raw materials to the labour employed, from suppliers to logistics and the distribution network, right up to the company's ethical commitment – which is often illustrated by allocating a percentage of the profit to global sustainability projects. ◆



Marta Murelli
info@ildoppiosegno.org
ildoppiosegno.org

Are you our new exclusive distributor? Then join our great international team

for our natural ProBiotic Live functional pet food



Several surveys revealed a growing customer demand for health-related formulas in natural pet food.



To ensure that Nature and Science are in balance - we have worked closely with dedicated international specialist in nutrition, probiotics, animal welfare and advanced food processing to develop a UNIQUE PET FOOD CATEGORY.



We have already experienced tremendous success in various markets and are therefore seeking new distributors in new markets – to go on this growth journey with us!

We are looking forward to hearing from you!



ProBiotic®
LIVE

Jørgen Baymler | j.baymler@bacterfield.com
+49 (0) 151 510 35 992 | bacterfield.com

Homemade diets for pets: better or worse?



Feeding cats with home-cooking leftovers and making meals for dogs from online recipes sounds idyllic, but does it also help pets to stay fit and healthy?

Growing concerns

In recent years, the number of owners feeding their pets on a homemade diet has grown – and so too has concern among vets whether those diets are complete and balanced. A poorly balanced diet can cause various nutritional and metabolic disorders. Depending on the degree of the nutrient deficiencies, pets may display clinical signs after just a few weeks or months but some of the problems will only become noticeable after several years.

These concerns are more prominent for young animals that are still growing, since they have greater nutrient requirements and special nutrient ratio needs.

DIY recipes

There is an abundance of do-it-yourself (DIY) recipes readily available on the internet and in magazines. Owners can simply follow the guidelines for ingredients (carbohydrates, proteins and fat sources) and prepare a 'good' homemade diet for their pet. Due to the above-mentioned concerns, a lot of research has been done worldwide into the suitability of these diets. Perhaps surprisingly, the majority of the readily available homemade diet recipes showed several nutrient deficiencies. Even more worryingly, some recommended the use of ingredients that are toxic (for example garlic, onions and leeks), harmful (for example cause brittle bones) or pose a contamination risk (for example raw animal products) for pets.



UNITED PETFOOD

Producer of dry & wet pet food,
biscuits & snacks for your
private label since 1994



Certified advice

Despite the concerns about homemade diets, they can be very beneficial for some pets – particularly animals that have food allergies or multiple diseases. Homemade diets are often highly digestible, which improves the nutrient absorption. When they are properly formulated, it is also easier to control the balance of nutrients.

However, to maximise the benefits, it is important that the homemade diet is properly designed based on the advice of a certified veterinary nutritionist. The expert will ensure that all the essential nutrients are included and keep a close eye on the animal in case the diet needs to be adjusted.

Trust the vet

Owners need to be aware that their pets' nutrient requirements vary depending on the species, life stage, body condition score, weight, activity level and certain diseases. The veterinarian will consider each of these parameters before giving the optimal nutritional advice for the specific pet. The veterinarian will also address the importance of providing the animal with a complete and balanced diet.

If a homemade diet is the best option, the owners should stick strictly to the diet plan. They should not alter the ingredients or amounts prescribed, and they must include any advised supplements, prepare the food in line with the specified recommendations and attend the necessary follow-up consultations. This approach will reduce the risk of owners creating a poorly balanced diet for their pets. ♦



Camila Baptista da Silva

Faculty of Veterinary Medicine, Ghent University
camila.baptistadasilva@ugent.be
ugent.be

From our 14 production sites
to the world



- | | |
|---|---|
| Gent
Dry pet food | Yzeure
Dry pet food |
| Wimille
Dry pet food | Biskupice
Dry pet food |
| Sainte-Colombe
Biscuits | Radom
Single serve wet pet food |
| Saint-Martin
Dry pet food + organic | Zaragoza
Dry pet food + snacks |
| Verteuil d-Agenais
Dry pet food | Buftea
Dry pet food |
| Coevorden
Dry pet food + biscuits | Pieve Porto Morone
Dry pet food |
| | Waalwijk
Dry pet food
Cold pressed pet food
Organic |

Contact us to start developing your
new brand today

Yellow goes green!



Josera
petfood with passion



BEST IN CATEGORY
SUSTAINABLE
BUSINESS

2020-2021



Josera produces 100% climate neutral

- state-of-the-art CO₂-neutral production facilities
- local suppliers
- climate-friendly transport
- the highest quality in raw materials
- our Forest-Conservation project in Ntakata Mountains, Tanzania

Our plan?

Carry on, tackle it and become greener and greener - you are welcome to follow this path.

Together with us!



Pet food with passion

Josera is specialised in first-class pet food that is 'Made in Germany' with a clear conscience in terms of pets, people and the planet.

Clear conscience

For almost 80 years, the Josera brand from idyllic Bavaria has specialised in producing the best-quality pet food with a clear conscience. As such, the company takes responsibility not only for pet health but also for people and the environment.

Quality in the feeding bowl

In order to meet the highest standards, the company exclusively uses high-quality ingredients and relies on its extensive experience. The result: highly digestible and extremely easy-to-tolerate recipes with proven excellent acceptance. All recipes are developed and regularly tested at the accredited in-house laboratory by a team of nutrition experts.

A varied selection for cats and dogs

Each animal has its own individual requirements, but the company's very varied pet food selection offers the right

menu for every type of pet – from the mellow couch potato to the agile bundle of energy, and from young pets to seniors. The Josera brand also provides species-appropriate food for sensitive four-legged friends with food intolerances or allergies.

Eco-awareness

Sustainability plays a very important role for the German company, which is why making its entire production process climate-neutral has been such a major milestone. The recipe for success: avoid CO₂ wherever possible, reduce CO₂ where it cannot be avoided and compensate for surplus greenhouse gases by means of other projects.

To achieve this, the pet brand looks at the entire value chain of its products, from the creation of the raw materials, through production and packaging, to delivery of the product to the customer's home. This end-to-end view makes Josera a pioneer in the international pet industry.

A large number of on-site measures are helping the company to achieve its goal of climate neutrality. These include state-of-the-art production facilities, regional raw materials sourcing and suppliers, electricity generation using the outstanding primary energy efficiency of the company's own power plant, and product storage at a high-bay warehouse constructed from regionally sourced PEFC-certified wood.

Lastly, for many years Josera has been compensating for all its unavoidable on-site emissions through its active involvement in a project to conserve a 216,000-hectare area of forest in the Ntakata Mountains in Tanzania. ♦

♦ **Josera Petfood GmbH & Co. KG**
export-petfood@josera.de
josera.com

WE CARE FOR OUR FOODPRINT



de haan petfood

BEST IN CLASS MEAT CHUNKS IN GRAVY

www.dehaanpetfood.com





Sustainable pet food production to European standards

When producing wet dog and cat food, De Haan Petfood is focused on quality, reliability, transparency and sustainability.

A solid foundation

Established in the 1960s, De Haan Petfood produces wet dog and cat food in the form of high-quality meat chunks in gravy. The key values of the company are quality, reliability, transparency and sustainability. Thanks to using real meat as a major ingredient, the company's products meet the highest European FEDIAF standards at a competitive price. Automated production and packaging ensure that human intervention is kept to a minimum which guarantees a consistent level of quality.

Certified quality

The entire production process, from raw materials to finished product, is constantly monitored to guarantee optimal quality. The company is an active member of the NVG, the trade association of pet food manufacturers and importers in the Netherlands, which in turn is part of FEDIAF, the trade body representing the European pet food industry.

De Haan Petfood's registered production plant is based in Nieuwkoop, the Netherlands, which is located between Rotterdam and Amsterdam. Thanks to easy access to major transport routes, any export market is within reach – whether in Europe or elsewhere in the world – and the team is involved in export activities on a daily basis. The manufacturer produces its own brands as well as a range of private label and fancy brands that are exported around the globe.

A sustainable process

The fully automated production process is extremely hygienic and efficiently organised, and the products are labelled, packaged and palletised in one go. De Haan Petfood has fully embraced sustainability efforts, such as only using 100% recyclable steel cans and ensuring that its waste materials are recycled as much as possible. Furthermore, it uses FSC labels and trays as well as bio-based shrink foil to seal the trays. Short-term

and medium-term sustainability projects include the installation of solar panels, reclaiming residual heat from used cooling water and fully electric company cars.

The future

The company is constantly developing new concepts that meet the requirements for healthy dog and cat food and the specific wishes of 'pet parents' and has ambitious plans for 2021. For example, the current portfolio of products and brands will be relaunched in line with the latest insight on customer needs. A new concept of wet food for dogs and cats will be introduced in the course of 2021. In support of these goals, De Haan Petfood has recently started implementing a contemporary cloud-based business management suite (ERP/MRP/CRM). ♦

♦ **De Haan Petfood bv**
info@dehaanpetfood.com
dehaanpetfood.com

Advertorials

Celtic Connection Holistic Pet Food BELGIUM Bye bye allergies

Fussy eaters, digestive problems, itchy skin, tearing eyes? Celtic Connection is the solution.

The grain-free recipes are made using a unique Single Source Protein Philosophy which includes meat from at least two animal protein sources in the same animal group. They provide a more balanced amino acid profile than traditional single-source protein recipes, while remaining hypoallergenic. A recipe formulation method so innovative, that it is patented!

Looking for distribution partners.

Emgee Trading bvba
info@emgeetrading.com
celticconnection.eu



Golden Eagle FINLAND Holistic Lamb Formula

Golden Eagle Holistic Lamb Formula is designed for dogs suffering from allergies, that may need special taste or help in digestive upsets.

It is a single protein source diet, meaning the formula only contains lamb as its main protein source. On the face of the bag, all raw materials are visible, making it easy to see the product's raw material base.

Golden Eagle Petfoods Co Ltd/ Shetland Oy
info@goldeneaglepetfoods.com
goldeneaglepetfoods.com

LABORATOIRE FRANCODEX

ATTEND TO THEIR EVERY NEED FROM THE EARLIEST STAGES OF LIFE!

Laboratoire Francodex early care products meet all puppies' and kittens' needs. A complete range including starch-free milk replacer, bottles (phthalate-free), a soothing dental gel for puppies, special care products such as the gentle shampoo, cleansing lotions for pets' eyes and ears, and a perfume with no alcohol or colouring agents which is kind to puppies' sensitive skin.



www.francodex.com

A photograph of a light-colored dog with a dark collar lying on its back in a lush green field. The dog's front paws are raised in the air, and its hind legs are also raised, suggesting it is relaxed or playing. The background is a soft-focus green landscape with trees.

Sustainable pet ownership

How can we reduce the environmental impact of caring for our feathered and furry companions to ensure a sustainable future for them and us?

Food

The factor with the highest environmental impact in both human and pet lifestyles is food. Modern food production methods are estimated to consume around ten times as much energy as is contained within the food itself. The costs of production, storage and transport are high. The best choice from a sustainability perspective is to source pet food locally and organically. Food waste plays an important part in the ecological footprint too, so it is essential to ensure that all pets get just enough for their needs – no more and no less.

Waste disposal

Dog droppings should always be picked up to minimise the environmental cost. Dog waste left in the street causes hygiene risks and hence potential costs to human health. Even in the undergrowth, dog excrement can cause specific plants to grow that would not otherwise flourish, thus potentially disrupting the ecosystem. Owners can use biodegradable or flushable poo bags to dispose of dog waste. Cat litter should be environmentally friendly; owners can recycle household or industrial waste such as newspaper or wood chips rather than using clay or silica. Additionally, work is ongoing to develop a future method of breaking down animal waste for use as composted fertilisers without the current risk of zoonotic diseases and parasites.

Exercise

When it comes to exercising pets sustainably, dogs should be walked close to home rather than being driven longer distances. Potential pet owners could be encouraged to choose breeds that are suited to their living situation, so that they think twice before bringing a large or highly active dog into a busy urban location where exercise choices may be limited.

Grooming

Owners can choose biodegradable variants of all pet grooming products to reduce their impact on the environment. It is also preferable to avoid plastic packaging and to opt for reusable or refillable containers.

Disease prevention

Vaccination, worming, neutering, dietary care and healthy exercise all add up when it comes to reducing the carbon footprint. By planning ahead, owners can avoid the unnecessary extra cost of treating preventable health issues. This will help our pets – and the planet – to survive and thrive. ♦



Karen Wild

Dog trainer and pet behaviourist
info@pawprintpets.com
pawprintpets.com



Did you know?

- ✓ Insect protein contains antimicrobial peptides – prevents inflammation in animals
- ✓ Hypoallergenicity unmatched by any vertebrates protein
- ✓ Production at the highest level of sustainability



Hipromine S.A. – Insect protein for industrial applications pet food, aquaculture, feed • development, production, expertise

www.hipromine.com/petfood
e-mail: petfood@hipromine.com
orders: sale@hipromine.com

We supply both product and expertise



For dry pet food,
for wet pet food, for treats...

HiProMeat – pure fresh meat. Innovative and nutritious insect-based alternative as ingredient for regular meat-based pet food



Setory SOUTH KOREA One Stop&Shop Private Label

Looking for an 'unforgettable' partner to build your own pet brand? Setory offers a pleasant experience of making own-brand pet food, treats, and supplies. With its in-house team of industry experts and facilities, the company makes reliable products, to serve the VIPs: our four-legged friends. Open 24/7 for information on the entire range of available products.

Looking for business partners.

Setory Co., Ltd
sales@setory.com
petoria.co.kr



Setory/Petoria SOUTH KOREA Petoria Korea

Since 2009, our four-legged friends made our lives whole. It is hard to imagine a life without them. So Setory meticulously crafted mouth-watering food, healthy treats, and sturdy supplies to make them happy. The company would like to introduce their products to you. Just 1 is all that it takes. For more information, open 24/7 at your service.

Looking for business partners.

Setory Co., Ltd
sales@setory.com
petoria.co.kr



ANOTHER SATISFIED CUSTOMER.

Ensuring great results for pet food manufacturers is our passion. That's why AFB International is your trusted partner in the science of pet food palatability. Depend on us for our research expertise, technical support and unparalleled customer service. Learn more at afbinternational.com



Argentina | Australia | Brazil | China | Mexico | Netherlands | United States | afbinternational.com

Bogaprotect SWITZERLAND

Get your turnover going before the first bite!

Bogaprotect spot-ons and coat sprays are based on probably the most powerful active ingredient of natural origin: *Eucalyptus citriodora* (hydrated/cyclised). Made from the leaves of the lemon eucalyptus tree.

It is a safe, preventive, highly effective repellent. A field study confirms repelling action for 4 weeks against ticks and fleas, 91% of ticks and 99% of fleas proven to be gone in week 2.

Available as an immediate and long-term protection product.

Looking for business partners!

Bogar

info@bogar.com

bogar.com/en





Pet Sustainability Coalition advances sustainable packaging leadership

As pet owners demand greater sustainability from the brands they buy, PSC helps the pet industry to address the environmental and social impacts of the use of flexible plastic packaging.

The challenge

Most packaging for pet food and treats is made of multiple flexible layers of differing types of plastic. In the US, 300 million pounds (135 million kilos) of such packaging is thrown away each year. The environmental consequences of the production and disposal of packaging, which include air and water pollution, carbon emissions and plastics pollution, are often distributed with unequal or unjust impacts on people.

Too big for one company alone

The larger-scale impacts and leverage points related to packaging use in the pet industry are too big for any one company to manage alone. For example, a

packaging supplier can make recyclable packaging that in turn is used by pet product brands. But what if there is no system or means to recycle that particular type of plastic in the communities where the product is sold? In that case, the 'cycle' in 'recycle' is never completed.

The Pet Sustainability Coalition (PSC) brings together companies throughout the pet industry supply chain and global market to address broader industry challenges related to sustainable packaging. In 2020, for example, PSC embarked on a project called Flex Forward to assess and test the opportunities for a circular economy of flexible packaging for pet food and treats.

Sustainable food and Pet supplies

Testing return-to-retail collections

The Flex Forward project began with testing 'return-to-retail' instore collection of used flexible plastic packaging for pet food and treats. Sponsored by pet product company Earth Animal and distributor Pet Food Experts, over 120 participating independent pet food retailers have collected 5,000 pounds (2,250 kilos) – approximately 20,000 used bags – from their customers.

This pilot project has been designed to determine the opportunities and challenges associated with collecting used packaging materials within the pet industry rather than relying on local governments or privatised recycling-recovery systems. The used plastic packaging materials collected during the pilot project will be processed and tested for use in 'downcycled' pet products (such as bowls or toys) to be donated to animal shelters.

Toward circularity

In addition to testing for use in downcycled products, PSC has engaged the expertise of NOVA Chemicals in the 'Toward Circularity' aspect of the project. The company will process and test the used packaging to determine the opportunity for increasing the circularity of recyclates used in flexible packaging for pet food and treats.

Ultimately, the results of the project are intended to inform and shape a pet industry-wide closed-loop plastics recycling programme whereby pet owners, retailers, brands and packaging suppliers can collaborate to reduce the environmental footprint of packaging.

Sustainable packaging event

To build collaboration in addressing packaging issues in the pet industry, PSC is hosting unPACKed, the first sustainable packaging event specifically for the pet

industry. This action-oriented online event will bring together sustainable packaging experts, suppliers, brands, manufacturers and retailers to address the rapidly changing marketplace around packaging and sustainability.

The virtual event will be held on 23 and 24 February 2021. For more information or to register, go to petsustainability.org/trade-show-events.

About PSC

As part of its goal to advance the sustainability of pet product packaging, the Pet Sustainability Coalition (PSC) provides tools, research and education to help individual companies address the impacts of their use of packaging. PSC also fosters greater industry collaboration. Its tools include the Sustainable Packaging Supplier Checklist and a report on the Examination of Multi Laminate Pouches. Resources also include case studies on life cycle assessments of packaging performed by the PSC Sustainability Team for member companies. These resources are available to download for free at

petsustainability.org/packaging.



Caitlyn Bolton Dudas

Executive Director and Co-founder of
the Pet Sustainability Coalition
cbolton@petsustainability.org
petsustainability.org

Ready for the future

With over 25 years' experience, Max Major strives to provide innovative, unique and high-quality pet products combined with competitive pricing and reliable delivery.

Where it all began

Max Major was founded back in 1995 and started out designing and producing dog apparel for the US market. Since then, the company has built up a global customer base and has supplied bedding, toys and carriers for cats and dogs all over the world.

The head office and showrooms are situated in the Pu Dong district of Shanghai, China, and the company's own four main production facilities are all within a one-hour drive. Having its own factories enables the company to offer value-added service with strong in-house design capabilities. A sampling team of 30 skilled people makes it possible to respond very quickly to any customer request.

Eye for design

After initially producing, supplying and selling only private label products, in 2017 the company established its own brand, FOFOS, to cater for the Chinese market. This brand has been represented

all over the world since 2019 and is still growing in Asia, the US and Europe. Due to this continued international success, a Europe-based sales and design team has been set up to further support customers globally. Innovative product development is paramount in keeping the brand at the forefront of the industry. Thanks to the experienced and dedicated Max Major sales teams in Southeast Asia, Japan, the US and Europe, customers can expect an immediate response and second-to-none service.

Company values

The company is built on passion, innovation, reliability and agility. For many years, it has been working on private-label projects with a global and European customer base of specialist wholesalers and major pet retailers. Alongside this private label development, branded products that provide alternatives within the pet marketplace are aimed at smaller regional wholesalers and retailers.

Green at heart

At Max Major, they believe that achieving a green outlook and sustainability will be one of the industry's biggest innovation and design challenges over the coming years. Testament to this belief is the company's 'Save Our Seas' range, launched in June 2020. The entire range of products is produced using fabrics made from 100%-recycled plastic PET bottles recovered from oceans. This helps to reduce pollution and protect the planet's vulnerable wildlife. It also provides a sound foundation for building further environmentally oriented ranges in the future. ♦

♦ **Max Major Ltd / FOFOS**
philippe@maxmajor.com
fofospet.com

Effective prevention for every cat and every dog

Combining science and the power of nature into innovative care products.

The power of nature

The power of nature has truly formed the heart of Bogar ever since it was founded in 1998 by a pioneer in herbal human medicine. The company's chemists, biologists and veterinarians soon started to transfer their knowledge to freely marketable products for cats and dogs. Today, Bogar has a strong focus in the areas of dental hygiene, anti-parasite products and skin and coat care. The team is convinced that pets stay healthy and active for longer with effective gentle prevention.

Everyday fit – a key growth driver

The company believes that prevention requires more than just effective products. The use of those products must easily fit into the everyday lives of owners and their pets in order to become part of the daily routine. But no two pets or days are identical, which is why the company not only focuses on the ergonomic aspect but also offers a choice of solutions and varieties.

Therefore, the Bogadent dental care range combines active teeth cleaning, functional dental chews and supplements to a complete dental care concept for the European market. In a further example of innovation, Bogar has addressed the needs of small dog breeds by launching the first mini toothbrush. Plus next month the company will introduce a completely new functional chew.

Combining nature with science

Nowadays, the company combines the power of nature with the latest scientific findings to create effective products for prevention and care. Numerous specialists in various countries are involved in the product development process, such as for the new Bogaprotect anti-parasite range. The active ingredient is Eucalyptus citriodora, the most powerful insect repellent of natural origin. The test results have been very impressive and the company has received encouraging customer feedback during the first season.

Switzerland – the base for international expansion

Although the company is based in Switzerland, some of the products are made outside of the country. The company's international team operates reliable and competent with a focus on high quality. This is also reflected in its long-term partnerships with distributors.

In Europe, the company is represented by distributors in Austria, Croatia, Czech Republic, Denmark, Germany, Greece, Italy, Luxembourg, the Netherlands, Poland, Portugal, Slovenia and more. Bogar has recently expanded into some Asian countries and is actively looking for additional distributors in Europe and Asia. ♦

♦ **Bogar AG**
info@bogar.com
bogar.com

A holistic approach to pet nutrition

Naturally inspired recipes that address the causes of imbalances rather than just the symptoms.

Rapid improvements in health

Since its humble beginnings in 2013, Celtic Connection Holistic Pet Food has grown in leaps and bounds. The recipes developed by Linda M. Gould, an osteopath and physiotherapist for animals, are based on the holistic approach she uses to address the most common issues seen in her practice. Thanks to recipes that focus on the causes of nutritional imbalances instead of only the symptoms, many pet parents see a quick improvement in their fur baby's health – often with remarkable results.

All of their lives

Taking a cue from Mother Nature, Linda developed her complete and balanced recipes using a unique patented formulation method that includes up to 80% meat ingredients, functional herbs to support the body's main detox organs and therapeutic amounts of joint supplements to keep pets moving and stimulate the immune system. The recipes are suitable for all life stages and provide natural nutrition to keep pets healthy and active well into their senior years.

Unique recipes address food sensitivities

The company's recipes provide a better amino acid profile than typical 'single-source protein' products, while still remaining hypoallergenic, making them ideal for long-term feeding of pets with food sensitivities. But the recipes are not just for sensitive animals; pets of all ages and breeds can enjoy the flavours, and owners can easily switch between them.

The range currently includes four dry kibble and tinned recipes for dogs, three dry kibble and tinned recipes for cats, three dry kibble recipes for ferrets and several crunchy treats, including one accredited in the UK by both the Vegetarian Society and Organic Farmers & Growers. All are grain-free and gluten-free and contain no beef, soy, dairy or GMO ingredients.

Commitment to sustainability

The brand's commitment to sustainability can be seen in the choice for 100%-biodegradable paper packaging produced from PEFC-managed forests and

printed with water-based inks, for example. The company also works with carefully selected manufacturing partners in the UK and Germany that use ethically farmed, local ingredients and have a demonstrated commitment to the environment. This has earned the brand top marks in the Good Shopping Guide and with the Ethical Company Organisation.

Holistic partners wanted

Celtic Connection Holistic Pet Food is already available in nine countries in Europe and the Asia-Pacific region and is distributed worldwide by Emgee Trading. The company is currently looking for additional partners to supply the unique, holistic range to caring pet parents through small, independent bricks-and-mortar shops. ♦

♦ **Emgee Trading bvba**
linda@emgeetrading.com
emgeetrading.com

Sustainable ingredients sourcing: a re-think?



Regional is good, global is bad. Many people would like it to be as simple as that but of course it is not. So which value standards and criteria should a responsible brand manufacturer apply in selecting suppliers who are open to sustainable raw material procurement?

Because we can?

As with human food, there has for some time now been a demand for superfoods such as chia, pomegranate and krill or exotic meat sources such as ostrich, kangaroo and water buffalo. A grain-free mega trend brought sweet potatoes, amaranth or even teff into the sights of producers and pet owners. The driver of this development has been the humanisation of pets on the one hand and the search for hypoallergenic raw materials on the other hand.

But today's customers demand transparency in the supply chain and want to know about the ecological footprint of products. So, a 'because we can' mode is currently undergoing a re-think: superfoods, such as blueberries and blackberries, or insects as a source of protein, are still being sourced, but regionally, from Europe.

No borders

In general, the earth does not care where in the world CO₂ is emitted during raw material production. Your task as a sustainable brand owner, however, is to know the carbon footprint of your raw materials and to reduce the carbon footprint of your pet foods through a clever selection of ingredients and animal-friendly formulae.

Sourcing slaughter by-products outside Europe creates additional income in those countries. In return, it should be important that the social and ethical conditions in the slaughterhouses in the countries of origin are as high as in Europe. Generally, though, less meat and more plant power in animal feed is still a more effective contribution to environmental protection. High meat production can mean the deforestation of rainforests in the Amazon for cheap soy.

Differentiate through added value

In reality, 'regional' and 'global' are not mutually exclusive but are two sides of the same coin. All value-added cycles worldwide are systemically networked with one another. Nor is real differentiation achieved through exotic ingredients. A more sensible approach would be to seek differentiation through real added value in function and service instead of through exotic ingredients. This would be real progress! ♦



Klaus Wagner
Sustainability Expert in Petfood
k.wagner@greenologe.de
greenologe.de



Ingredients and Production

While the pandemic crisis has been disruptive, it has not slowed the drive towards greater sustainability in sourcing and production. From local sourcing to novel and natural ingredients, to packaging, catch up on the latest developments.

Why source locally?	32
Local sourcing of wild ingredients – the pros and cons	34
Alternative proteins: are we there yet?	36
Tetra Pak THE NETHERLANDS	39
Sustainability starts with sourcing co-products	40
Sustainability in pet food	41
Pet food for thought	42
A new look at an age-old remedy: propolis	44
Rice starch – the secret to success in clean label pet foods	47



Why source locally?

The disruption caused by the COVID-19 pandemic is not the only reason to consider sourcing more locally. Local sourcing also offers several advantages when it comes to two of the biggest current trends in the pet food industry: the humanisation of pet products and increased sustainability demands from consumers.

Exposed vulnerability

The COVID-19 pandemic sent ripples throughout the entire pet industry. Global supply chains suffered from lockdowns and closed borders. Migrant workers were not available, crops could not be harvested and cross border logistics came to a halt. At the same time, consumers started buying more locally. So, why not increase efforts to source locally?

Improved sustainability

Of course, local sourcing can only work if local resources are economically viable and if it is competitive with highly optimised supply chains. But there are other factors impacting this equation.

Reduced logistics due to local and shorter supply chains logically leads to a reduction of greenhouse gas

(GHG) emissions. Besides GHGs, particulate matter is also emitted and transport by ship negatively impacts ocean ecology.

When sourcing locally, any negative or positive impacts are locally oriented as well as any economic benefits. Local impacts combined with local sales increase the awareness of sustainability and leads to more sustainable demands. In that respect, local sourcing can be a driver for more sustainable choices. The real, or true cost of production is more visible and actions reducing environmental and social costs can be visibly linked to economic benefits.

Increased supply security

Even before COVID-19, climate change and geopolitics already influenced market volatility. Since the



pandemic, the risk of global supply chain disruption is starkly highlighted. Has COVID-19 changed the world in such a way that local sourcing has become a prerequisite for guaranteed supply?

With needs remaining the same, local production can become the new normal. A better and direct relation with primary suppliers, with less intermediates, leads to improved communication about quality demands and better understanding of product availability. It may also influence value distribution in favour of investing in sustainable production practices. Additionally, local sourcing can be a driver for product innovations as the available resources might not always be the same as the ones previously used.

Increased transparency

Local supply chains are shorter, enabling increased transparency. Increased transparency has twofold benefits. Firstly, it helps to understand value chain processes and enables optimisation. Secondly, it can help to build brands. Humanisation of pet products has driven increased use of natural and fresh ingredients

as a mode to increase product quality. Direct supply relations and sharing of information along the supply chain, helps consumers to better understand quality and sustainability of products.

A good example is the shoe producer Hanwag, which allows you to find out where the cow providing the leather for your shoe has grazed. Another example is Eosta, a fruit trader that tells the story of its producers and demonstrates the sustainability impact of its products.

A new normal

COVID-19 has changed our world forever. Temporarily travel restrictions have severely impacted our supply chains. When a vaccine is available, travelling will happen again, but the shown vulnerability of our supply chain already makes us think differently of where we source the resources for products which are important to us.

Pet products, and especially food for our pets, are among these important products and hence we expect a mixture of sourcing farther away with sourcing locally to fulfil the wish for high quality products. Increased sustainability demands will further drive local sourcing, because of increased transparency and possibility to influence product production and development. ♦



David Thelen

Sector Manager built environment at MVO Nederland
david.thelen@mvonederland.nl
mvonederland.nl



Bianca Nijhof

Managing Director, Netherlands Water Partnership
b.nijhof@nwp.nl
netherlandswaterpartnership.com



Local sourcing of wild ingredients – the pros and cons

Pet food made with local, specialist or 'wild' ingredients has become a major marketing opportunity in the last few years. But it has its own challenges.

Locally sourced

Local sourcing that involves a specific animal or plant that is regionally exclusive, lower in food miles or a 'pest' species can be particularly interesting, both from a marketing and a sustainability point of view. Typically, it is associated with 'feral' versus 'farmed' ingredients.

For example, in New Zealand, there are pet foods based on meat from possums, which have been classified as a pest with a national culling programme in place. Possums are available throughout the country and so are low in food miles. They damage the environment and consume native bird eggs, so their cull is preserving the local, fragile ecosystem.

Venison is another local source of meat. Deer can quickly form large populations and are culled to prevent land and vegetation damage, preserving balance in the ecosystem. Similarly, in Australia, kangaroo culls provide a local meat source.

Nutritional consistency

Culled animals represent all age groups, which has a direct effect on the nutrient profile of their meat, due to level of maturity. Therefore it is important to analyse nutrient levels from each batch in order to formulate accurately. This is in stark contrast with using, say, chickens sourced from commercial broiler farms, which will have similar carcass composition. If using rendered or dried ingredients from local species, then appropriate blending will give a more consistent product, reducing the need for multiple laboratory testing.

Sustainability and sourcing

When using local wild or feral raw materials, the following questions must be addressed. Firstly, is it free of contaminants? Non-farmed raw materials are more likely to be exposed to disease-causing pathogens, soil and water contaminants (such as mycotoxins, heavy metals and toxic algae). Second, are there any potential negatives regarding animal welfare



Non-farmed raw materials are more likely to be exposed to disease-causing pathogens, soil and water contaminants.

or environmental issues? Third, can the material be readily obtained all year round? Where annual culls of certain animals or harvesting plants are performed, it is important to ensure adequate supply and in a form that can be stored (for example, dried, rendered, frozen) prior to use.

Finally, even with local sourcing, transport issues need to be considered. The COVID-19 outbreak has caused problems in obtaining feed materials even locally (because of regional lockdowns), so always check supply or an alternative option. Advanced planning and predicting manufacturing requirements are essential to keep production going.

Marketing opportunities

There are many marketing opportunities when using local ingredients, including novel ingredient claims and environmental benefits. However, sourcing, quality control and variability must be addressed during development, especially where nutritional standards are applied for access to market. ♦



Dr Lucy Waldron
Director, LWT Animal Nutrition
lucy@animalnutrition.co.nz
animalnutrition.co.nz

BEST QUALITY FOR OUR CUSTOMERS

CUSTOMER TRUST US AND RIGHTLY EXPECT THE BEST PRODUCT QUALITY.



Regular determination of nutrition values and inspection of the production by SGS INSTITUT FRESENIUS.

**REGULAR
QUALITY CONTROL**



**SUSTAINABLE
FISHERIES**



**GOOD
RABBIT
COMMENDATION**

COMPASSION in world farming 

**COMMENDATION AWARD
FOR HIGHER WELFARE**

www.compassioninfoodbusiness.com/awards/good-rabbit-award/



**YOUR FAVOURITE SNACKS
FOR YOUR FAVOURITE PETS**



www.dokas.eu



Alternative proteins: are we there yet?

The need for sustainability is pushing the pet food industry to come up with new ideas, procedures, and science when it comes to one of the most expensive nutrients in pet food – protein.

Getting sustainable

The development of novel ingredients and alternative protein sources can have an impact on improving the nutritional sustainability of the sector. Alternative protein sources include the use of by-products of the human food sector or the development of new protein sources from plants, lower-order animals, or single-cell organisms, such as insects, fungi, and algae.

Insects and algae

Preliminary results from research suggest that insects and some marine algal species may be practical alternatives to traditional protein and supplemental taurine sources. However, the authors of this same research conclude that some species of brown algae

have been shown to contain anti-nutrients that have anti-pepsin activity in vitro and could compromise overall protein digestibility. Therefore, more research is needed before incorporating various species of algae into animal diets.

As for insects, interest in society has already resulted in the development of a number of insect-containing pet food products and the research is showing promising results. The apparent nitrogen digestibility values for insect-based diets were in the range of those for pet food containing conventional protein sources. However, the inclusion of insect ingredients can influence the acceptance and palatability of the food when it comes to pets.

Ingredients and Production

More, long-term studies are still needed to evaluate the adequacy, safety but also beneficial aspects of alternative proteins.

Environmental impact

The comparative advantage of insect ingredients in terms of environmental impact is not always clear either. Insect proteins have a lower environmental impact than conventional meat proteins, but this should be assessed with caution in the context of pet foods that are largely based on animal by-products and are not in competition with the human food sector.

Keep improving

To advance the inclusion of alternative ingredients like insects, algae and other aquaculture by-product will take more work on various fronts. Ongoing developments in technologies, breeding, and nutrition can further increase production and reduce the cost as well as the environmental impact. But it will also be essential to understand pet owners' views and values regarding insect rearing where the residual organic sources are used and to provide assurance that insects are safe and high-quality ingredients.

More, long-term studies are still needed to evaluate the adequacy, safety but also beneficial aspects of alternative proteins before incorporation into canine and feline diets. ♦



Dr. Diana Brozić
Assistant professor at the University of Zagreb
diana.brozic@vef.hr



WELLY
COLOUR™



The best blend of natural ingredients

Innovative palatability enhancers for dog and cat with the highest quality raw materials.

Superpremium feedstuff:

- WELLY ORANGE / Citrus
- WELLY RED / Redfruits
- WELLY GREEN / Vegetables
- WELLY AGE / Herbs and Spices
- WELLY TROPICAL / Pineapple, Papaya and Kiwi
- WELLY BEE PLUS / Royal Jelly and Aloe Vera
- WELLY DOR / Citrus and Omega3

Innovative solution backed by solid science
ISO 9001:2015 - EU organic - EU reg n° 183/2005
certified - EU reg n° 1069/2009 certified

italfeed
Naturally
the best for animal health

Differentiate your pet food with our innovative carton



Reduce your climate impact with Tetra Recart®

Recyclable Packaging

At least 70% renewable paperboard material

Around 80% less climate impact than alternatives*

Optimized logistics for fewer trucks on the road

Go to [tetrapak.com](https://www.tetrapak.com)



 **Tetra Pak®**
PROTECTS WHAT'S GOOD

*Tetra Recart® 390ml compares to alternative packages in the same size in the same category;
Source: Comparative Life Cycle Assessment of Tetra Pak® carton packages and alternative packaging systems
for beverages and liquid food on the European market, Ifue Heidelberg, March 9th 2020



Two centuries smarter

Tetra Pak is a world leading food processing and packaging solutions company, that works closely with its customers and suppliers. It provides safe, innovative, and environmentally sound products that each day meet the needs of hundreds of millions of people in more than 160 countries.

Where it all began

The company's motto, 'protects what's good', reflects its vision to make food safe and available, everywhere. It all started in 1943, when the founder, Dr. Ruben Rausing, created a carton package for milk. His invention revolutionised the distribution of liquid dairy products. Today, the company continues to change food distribution. An example is Tetra Recart®.

More sustainable

As the world's first retortable food carton, it is a more sustainable alternative for foods normally packed in cans, pouches, alu-tray or jars and is suited for all kinds of wet pet food such as chunks in gravy, chunks in jelly and pâté.

Made mainly from FSC™ certified paperboard, the product is the first paper-based packaging material robust enough to withstand the retorting process. Compared with cans, it is more lightweight and fits

10–20% more units per truck which cuts logistic-related emissions. Its rectangular shape takes up to 30% less shelf space and makes it ideal for e-commerce logistics and the retail shelf.

The findings of an independent study show that compared to other alternatives, the product has by far the smallest carbon footprint. Additionally, compared to cans or glass jars, it can help lower impact by 80%.*

Tasty, eye-catching and convenient!

Today, pet food must appeal to the senses of both pets and owners. While the company can help its customers to get their recipe right for pets, the packaging's fully printable flat surface enables a billboard effect that visually appeals to pet owners. Retailers will love it too!

The package is convenient, lightweight, easy to store, safe to use, easy to dispose of and recyclable in existing carton waste streams.

The production option to suit

To meet the needs of different brands, customers can either choose to invest in a full Tetra Recart production line or manufacture through the company's co-packer network.

In short, Tetra Recart is good for our four-legged friends and their owners; it is a good choice for the environment and it is smarter logistics-wise. It also has a differentiating and smarter look and offers flexible production options. ♦

*Tetra Recart® 390ml compared to alternative packages in the same size in the same category. Source: Comparative Life Cycle Assessment of Tetra Pak® carton packages and alternative packaging systems for beverages and liquid food on the European market, Ifue Heidelberg, March 9th 2020

♦ **Tetra Pak B.V.**
patrick.vanthoff@tetrapak.com
tetrapak.com

Sustainability starts with sourcing co-products



With the world population continuing to grow and the climate emergency increasing, it becomes more urgent for every business to respond positively. More natural resources are used than the earth can regenerate. Wastage of crops adds to the problem. Using human-grade food products for pet food is unsustainable.

Virtuous circle

It is important to produce within the limits of the planet. Therefore, the circular use of raw materials is of crucial importance. By valorising plant-based co-products, a virtuous circle is created where raw materials are maximally used and waste is prevented.

Co-products are released during processing of crops into food and beverages, like chicory pulp, potato cuttings, potato peelings and side-stream starch. They can also be obtained from vegetables which are not used for human consumption.

Natural sustainable ingredients

For more than 50 years, Duynie Group has been playing a central role in leading the transition to a robust and sustainable circular food system. Duynie Ingredients, a part of the company, offers the pet food industry natural ingredients that are entirely sustainable since they are co-products and no crops are specially grown.

In its own factory in the Netherlands the wet incoming co-products are dried with residual heat and green electricity, instead of fossil energy. Dried ingredients are easy to handle and manage so they can be ground

or cut to the right consistency for use in pet food or muesli. The ingredients perfectly match pet food producers' ambitions to source pet food ingredients sustainably.

Lower environmental impact

Life Cycle Assessments (LCA) prove that these ingredients have a lower land use and carbon footprint than alternatives on the market. Pet food producers will lower the environmental impact of their pet food by using these sustainably sourced ingredients and pet owners can feed their pets in a way that respects the environment.

Being rated as one of the Pet Sustainability Coalition's (PSC) top 20 most sustainable companies proves that the company is a frontrunner in providing sustainable pet food ingredients. It contributes to sustainable pet food consumption via sustainable pet food ingredients. ♦



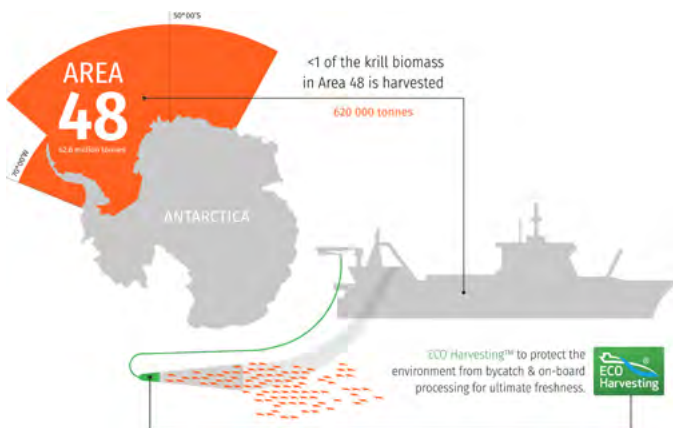
Corine Kroft
Sustainability Manager
c.kroft@duyniegroup.com
duynie-ingredients.com

Sustainability in pet food

The call for action on sustainability is growing in all parts of society. Many people are considering how to shift to more sustainable consumption, but what about our pets?

Decarbonising pet food

There is an increasing emphasis on establishing more sustainable food systems, and the pet food industry is no exception. According to the EAT Foundation, studies show that if the pet food industry was a country, it would be the 6th largest carbon emitter in the world.



Pet food brands need to walk their talk on sustainability, and increasingly so: in a documented way. Pet food brands can require their suppliers to provide Life Cycle Assessments (LCAs) mapping the carbon footprint of the individual ingredients in their feed. Aker BioMarine has recently updated the LCAs of all their product lines. Its marine ingredient for pet food, Antarctic krill (QRILL Pet meal), benefits from a lower carbon profile than many land-based alternatives.

Responsibly sourced ingredients

Sustainability is also about responsible use of natural resources. Antarctic krill make up one of the world's largest marine biomasses. At certain times of year, Antarctic krill swarms are so dense they can actually be seen from space. Given the importance of krill as a keystone species in Antarctica, the commitment to ensure a healthy ecosystem for other animals that depend on krill as a primary food source has always been paramount. Before the company ever deployed its first fishing net, it entered in a dialogue with different NGOs to take advice on fishing operations that would have as little impact as possible on the Antarctic ecosystem.

The krill fishery is monitored and regulated by the Commission for the Conservation of Antarctic Marine Living Resources, an organisation committed to ensuring the protection of marine life in Antarctica. CCAMLR regulates the precautionary principle strictly in the harvesting area, with an annual quota of maximum 1% of the local biomass.

A sustainable choice

Aker BioMarine's QRILL Pet is the first krill ingredient for pets certified by the Marine Stewardship Council (MSC). Rich in omega-3 fatty acids, choline, astaxanthin, and marine proteins, the product delivers great nutritional benefits for pets. ♦



Runa Haug Khoury
Director Sustainability, Aker BioMarine
Runa.Khoury@akerbiomarine.com
qrillpet.com



Pet food for thought

Pet owners' desire to feed their pets human quality food with high meat content and their wish to feed more ethically and sustainably are seemingly at odds. New approaches are emerging that could resolve this tension.

Ethics of anthropomorphism

Traditionally, pet foods relied on livestock farming by-products linked to the human food system, thus helping to offset the industry's environmental burden. But as pet owners increasingly demand high quality ingredients and high meat content, so pet and human food systems are finding themselves in direct competition for more rapidly depleting resources. Related problems also arise, including overconsumption, obesity, food waste and the high economic cost of protein production.

At the same time, consumer awareness of ethical and sustainability issues is putting pressure on manufacturers to respond. The result is a growing demand for alternative protein sources.

Is plant-based better?

Plant-based food has a lower environmental impact. For instance, the production of 1 kg of animal protein requires 100 times more water than 1 kg of grain protein. Unfortunately, there is no widespread belief that plant-based foods make proper pet meals. Only one in three vegan pet owners opt for such diets. There is a need for more evidence of nutritional adequacy, veterinary approval and greater availability of plant-based pet food options.

The clean protein alternative

Clean or cultured meat is grown in the laboratory using biotechnology, without raising and slaughtering animals. The clean protein, plant- or animal-based, could easily take over 30-50% of the market.

Ingredients and Production

Importantly, as clean meat is produced in a controlled environment, it will not cause a product recall due to chemical or bacterial contamination. Since pets do not need perfectly realistic texture or aesthetics, cultured meat is likely to appear in their foods sooner than in humans'.

A way forward

This emergence of alternative protein is certainly timely. A growing demand for sustainable pet foods, possible future regulatory restrictions to expansion of animal meat production, as well as alternative protein sources for human food supply; all point to the likelihood of a smaller relative availability of by-products from human food production in future, leading to higher prices.

New ingredients offer a way forward by improving the sustainability of pet foods sources. Alternative protein might be obtained from by-products currently viewed as waste, but also from the development of new protein sources with a low environmental impact. Such alternatives may include insects, cultured meat, algae protein, myco-protein (derived from fungi) and wood-eating yeast. Whatever the choice, the future foods must be nutritious, but also comply with a new set of requirements. ♦



Karolina Holda, PhD

Advisor, trainer and speaker, canine & feline nutrition
kontakt@karolinaholda.com
karolinaholda.com

TROPICLEAN. fresh breath[®]

DENTAL HEALTH SOLUTION for dogs

**certified to
bring out your pet's
natural smile**

new name
& look

**same
fresh
breath!**



for **cleaner teeth** and **fresher breath**,
**try our complete line
of oral care products**





A new look at an age-old remedy: propolis

As the concern around public health is growing, so is the demand for natural multifunctional ingredients – those that will combine antimicrobial, antioxidant and anti-inflammatory actions in food for humans and animals. Time to revisit honey bee products.

An old recipe

It is no wonder that honey bee products such as honey, propolis, royal jelly and bee pollen, are regaining their popularity. In Europe, humans and western honey bees (*Apis mellifera*) have been living side by side since ancient times. Since then, we have perfected ways of utilising their products as food, cosmetics and therapeutics.

Honey

Honey is the end product of nectar digestion, a supersaturated aqueous solution made of 80% sugars (mostly fructose and glucose) and stored in honeycomb cells. Honey is used as food but also as a medical device for wound management. Natural unheated honey has broad-spectrum antimicrobial activity, and honey itself has been reported to have great wound healing properties.

Propolis

The same goes for propolis, a resinous mixture collected by bees and used as the construction material for beehives, but also for their collective immunity. It has more than 300 bioactive compounds, mostly from terpenes, terpenoids, waxes and phenolics. In Europe these are mainly of poplar tree origin, so the European propolis is of poplar type. Of all the products from the beehive, propolis is the most potent antimicrobial and antioxidant and thus has beneficial effects when used in digestive disorders, skin and teeth problems, and even allergies.

Royal jelly

Royal jelly is a white-yellow, colloidal, slightly acidic secretion from the salivary glands of young nurse bees. Royal jelly is food for all bee larvae for the first three

days of their life and for the queen bee throughout her lifespan. It consists mainly of water (60% to 70%), carbohydrates, proteins, lipids, and the remaining 0.8–3% are vitamins, minerals, and phenolics. Numerous studies have confirmed the beneficial effect of royal jelly on reproductive health, neurodegenerative disorders, wound healing, and aging.

Bee pollen

Bee pollen consists of proteins, amino acids, carbohydrates, lipids and fatty acids, phenolics, enzymes, coenzymes, vitamins and minerals. Honey bees use it to prepare the bee bread, the main protein source for the colony, and as the nutritional and mineral source for royal jelly. There are approximately 200 substances from different plant species found in pollen grains, flavonoids, phenolics, and enzymes, contributing to its antioxidant activity.

New methods for old ways

Certainly, honey bee products have health promoting effects, but their preparation and standardisation methods require knowledge and experience, as their content varies with botanical and geographical origin. Luckily, in parts of Europe, beekeeping is traditional and so is the use and preparation of honey bee products. When combined with modern technologies, these traditional extraction methods become scalable and sustainable, and the implementation of honey bee products as functional ingredients in pet food and cosmetics becomes not just realistic, but also smart and innovative. ♦



Jelena Šuran, DVM, PhD
Assistant Professor, Department of Pharmacology
and Toxicology Faculty of Veterinary Medicine,
University of Zagreb, Croatia
Jelena.suran@vef.hr

SOS

Save our seas



**Pet products made from
recycled plastic bottle fabrics
Inspired by our precious oceans**

Get the SOS brochure from...
philippe@maxmajor.com



Hong Kong Office
Unit A 6th Floor
Wah Kit Commercial Centre
300-302 Des Voeux Road Central
Sheung Wan Hong Kong China



Kit Cat International SINGAPORE
Snow Peas Cat litter

Kit Cat Snow Peas is a 100% eco-friendly cat litter. Created with natural green pea fibre, it is a safe, non-toxic formula.

- Free from harmful ingredients • Excellent liquid absorbent features
- Effectively eliminates odours naturally • 99% dust-free, leaves no paw tracks
- Fast and easy clean-up • Quick clumping capabilities
- Clumps can be repurposed as organic garden fertiliser

Kit Cat International Pte Ltd
 info@kitcat.com.sg
 kitcat.com.sg



Farm Company ITALY
Sustainable soybean collars

An innovative range of sustainable collars and leashes made from soybean fibres is the new launch in Farm Company's Green selection of eco-friendly products. Processed with cotton to increase strength, the range ensures a cashmere-like soft touch, gentle on our pets. Coat and environmentally friendly. High-quality bronze metal details and 5 different earth-colour shades: olive green, taupe, burgundy, pumpkin and navy blue.

Farm Company Srl
 info@farmcompany.it
 farmcompany.it



Lex&Max THE NETHERLANDS
Box-bed 'Dubai'

Lex and Max have once again expanded their range with luxury box-beds. The box-beds are made of printed velvet. Fabricated in a strong interior fabric that can be zipped off for cleaning.

The box-beds with detachable covers are available in 3 sizes: 75x50 – 90x65 – 120x80 cm. Each size can be supplied as a completely filled box-bed or as a spare cover in a luxury box.

Lex&Max B.V.
 info@lexenmax.nl
 lexenmax.nl



Setory SOUTH KOREA
Just 1-Scoop Phytoncide Litter

The patented technology formula: Phytoncide micro-beads cat litter. All-natural and safe 'phytoncide' beads stay on top and pop on contact to eliminate odours and bacteria. Both tofu and bentonite litter available. Patent and trademark protected in Korea and China. Contact the company for trial samples, more details and private label inquiries.

Looking for business partners.

Setory Co., Ltd
 sales@setory.com
 petoria.co.kr



Rice starch – the secret to success in clean label pet foods



Consumers want to make healthier choices about what they feed their pets. Rice starch can help manufacturers to achieve the highest quality and have maximum consumer appeal for their pet food products.

Clean label

A survey highlighted that three quarters of pet owners want feed products that contain less, or no, ingredients they dislike, such as artificial colours and flavourings, and actively avoid products with fillers, additives or chemical ingredients. Demand for all natural, recognisable ingredients is high and this is driving a shift in pet food production.

All things natural

Cleaning up the label on wet pet foods is a challenge as, traditionally, these contain guar, cassia or xanthan hydrocolloids, carrageenan or locust beans. These are used to cost-effectively create the appropriate viscosity in the wet pet foods. However, with demand rising for natural and recognisable ingredients on-pack, more manufacturers are looking to replace these gums with clean label ingredients such as rice starches.

In wet pet food

Rice starch offers an ideal replacement for modified starches in veterinary and premium wet pet food products. Natural and recognisable to consumers on pet food labels, rice starch also performs exceptionally. It creates soft gel structures and creamy textures with excellent stability during shelf life and temperature fluctuations (offering freeze-thaw

stability). Trials have shown that by adding just 3% of BENE0's native waxy rice starch to a recipe, a similar viscosity is achieved in wet pet food gravies as those containing traditional gums.

In snacks and hypoallergenic pet foods

Rice starch can optimise extruded pet snacks and treats, as well as baked products. With its high hot set temperature, it improves their porosity and surface, allowing for a good level of crispiness and crunchiness in the final product. Additionally, rice starch has a neutral taste and colour, with good palatability, so that it will not influence negatively the organoleptic profile of the end product. Rice starch is also highly digestible and, being free of most common allergens, it is ideal for use in products aimed at young or sensitive pets and in hypoallergenic pet foods.

Rice starch is well placed to help manufacturers remove artificial preservatives and flavourings from their pet food ingredients' labels and make the most of this growing clean label trend. ♦

Karel Thurman
Commercial Director, BENE0 Animal Nutrition
Karel.thurman@beneo.com
beneo.com



A close-up, shallow depth-of-field photograph of a dog's paw, likely a golden retriever, resting on a light-colored, textured surface. The paw is the central focus, with its fur appearing soft and detailed. The background is blurred, showing hints of green and brown, suggesting an outdoor setting. The overall mood is calm and intimate.

Global pet industry

The pandemic continues to have an effect on the health of businesses and industry all over the world. But there are encouraging reports about the global pet market. The latest figures tell the story...

Companies embrace creativity when it comes to sustainability	50
The changing landscape of e-commerce	52
The US: looking back at 2020 and ahead to 2021	54
Impact of COVID-19 on the Canadian pet industry	56
COVID-19 and developments in the US pet market	58



Companies embrace creativity when it comes to sustainability

One of the positive effects of the pandemic is increased awareness of the importance of sustainability. And consumers want sustainable products for their pets too. How are manufacturers meeting this need in different parts of the world?

Zoonotic diseases – a result of human activity

There has been mounting evidence suggesting that pandemics are linked to human activity's impact on nature. The World Wild Fund For Nature argued in June 2020 that the emergence of zoonotic

diseases in humans is caused by activities such as deforestation and industrial farming. A report from the United Nations Environment Programme echoed these findings, stating that resource extraction and climate change are among the reasons behind a rising trend in zoonotic diseases.

Prioritising the environment

Even before this research hit the headlines, 25% of the UK population had stated that the environment has become a higher priority for them since the COVID-19 outbreak. Mintel expects the pandemic to fuel a heightened focus on sustainability in the medium to long term too, even after the immediate threat to personal health and household finances has ebbed.

Natural cat litter catching up

Natural cat litter lags behind traditional (clay) options by a wide margin, but it is growing fast. While smaller brands have been active in the natural litter market for years, leading players are tapping into this movement by expanding their product lines. Purina Tidy Cats launched Naturally Strong Litter in March 2020. The litter is formulated with activated charcoal and claims 100% natural performance. Kent Pet Group's World's Best Cat Litter uses all-natural compressed corn to provide enhanced odour control.

Meat off the pet menu?

Meat in particular has come under scrutiny in sustainable diets, and 29% of cat and dog food buyers agree that it is good for pets to regularly have plant-based meals. Given this interest in meat reduction, and the nutritional needs of cats and dogs, there is a case for the market to explore alternative sources of protein. While some brands are already looking to insect protein, new technologies should also be considered in the longer term. 30% of UK buyers – and as many as 43% of those aged 16-34 – are interested in pet food made from lab-grown meat.

Vegetarian options are becoming increasingly widespread. In Austria, Vitakraft Veggie Bits Karotte are a 100% veggie, low-calorie snack made of carrots and enriched with parsley. In India, Fresh for Paws Vegetable Stew is home-made with olive oil and fresh vegetables.

Packaging counts

With plastic packaging waste firmly in the public spotlight since 2018, environmentally-friendly packaging claims have been rising, in pet food launches too. Focusing on a company's green credentials during new product development is vital in the UK now that 66% of dog and cat food buyers state they would choose a brand that uses eco-friendly packaging over one that does not. In China, meanwhile, recyclable features are in the top ten of claims increasingly seen on newly launched products in the pet food market. In Japan, Purina Mon Petit Natural Kiss cat food retails in an environmentally-friendly pack which is said to reduce 6% of plastic waste and approximately three tons of plastic use per year.

While much of the activity has come from packaging using materials suitable for recycling, various brands are looking to go beyond this. For example, while Scrumbles uses plastic-free, compostable paper bags for its treats and snacks range, its wet food comes in white plastic trays to ensure they can be recycled. Along similar lines, insect-based pet food specialist Yora states that its dry food bags are compostable and can be disposed of with food waste. And in a more novel approach, Soopa dog treats packaging calls for pet owners to 'reuse me as a pooper scooper'. ♦



Amanda Lintott
PR manager at Mintel
alintott@mintel.com
mintel.com

Organic clumping litter

Natural wood fibres

- 100% natural
- Extremely absorbent
- Odour-binding
- Antibacterial
- Virtually dust-free
- Very lightweight

Private labels possible



The changing landscape of e-commerce

Not since the Great Recession of 2008 has retail experienced such a disruptive and damaging year as 2020. There have been many changes, but not all for the worse. The pet industry seems more resilient than other sectors.

Four key impacts



Four key impacts have hit the pet industry particularly hard. First, COVID-19 puts pressure on bricks and mortar as countries experience intermittent lockdowns. Second, further integration of omnichannel where non-pet specialty brands have expanded their offerings. Third, the focus on DCM causing uncertainty and speculation about grain/grain-free formulations. And lastly, e-commerce (Zooplus, Amazon and Chewy) dominating regular pet retail.

It is not all bad news

Ultimately, consumer patterns for pet retail remained unchanged, and the necessity to stay home spurred DIY care for pets. Adoptions are up over previous years, driving new purchases of higher margin durables and creating higher value customers.

In the months following the start of the pandemic, online pet sales in the US grew by 77%, with a 28% rise in new e-commerce subscriptions. 81% of pet owners are currently more isolated and expecting e-commerce solutions. Today, e-commerce pet industry penetration is 18% and is expected to grow to 35% by 2024.

Global pet industry

	Europe		USA	
Number of pets	No. dogs No. cats	71m 84m	No. dogs No. cats	94m 90m
Pet supplies market	2020 2019	€26.3bn €25.3bn	2020 2019	\$58.8bn \$54.6bn
Pet supplies market online share	2020 2019	17% 14%	2020 2019	27% 22%
Grocery online share	2020 2019	4% 3%	2020 2019	10% 4%
Online market leader	 zooplus	40%	 chewy	41%

(Source: Zooplus Capital Markets Day 11/20)

Many pet retailers have risen to the challenge, quickly reorganising and upskilling their teams to focus on much-needed improvements to realise their digital transformation strategies. Pet stores are deemed 'essential', but the desire for ease of purchasing leading to online demand has forced retailers to rethink priorities. This has offset some losses for retailers and helped them much improve e-commerce capabilities to make their businesses more 'Amazon-proof'.

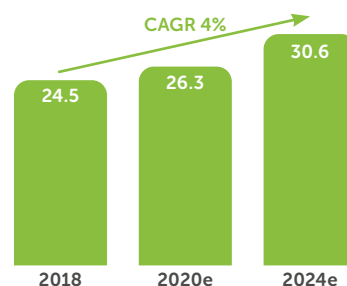
Global overview

Europe now has 71 million dogs and 84 million cats (+16% and +25% compared to 2010). But while the EU pet industry is expected to grow 4% CAGR to €31 billion (\$38 billion) by 2024, the US still have by far the largest pet products market, estimated at \$59 billion (€49 billion) in 2020, with a 47% global share. A noticeable development is that Brazil now heads a second tier of markets worth more than \$1 billion (€823 million).

Key drivers of the growth in sales include the trend towards specialised nutrition and continued premiumisation, as 90% of pet owners now consider their pet a part of their family. Both Packaged Facts and Euromonitor expect healthy growth for the pet care market in 2021, registering 7.6% growth, with pet food increasing 5.5%.

Online players well positioned for growth

Chewy, the US's largest online pet retailer, announced guidance of \$6.8 billion (€5.6 billion) in 2020 revenues (+40% YOY) and break-even EBITDA for the first time.



Compound Annual Growth Rate in Europe (Source: FEDIAF)

Zooplus has continued to steal market share from offline businesses and recently reported record sales growth. With more than 4.9 million active repeat customers, 77% of whom are female, their sales per customer is now €380 (\$467).

While change and disruption are constants, agile adoption to dynamic needs should remain a key priority for all pet retailers and manufacturers in 2021. ♦



Jodi Watson
Independent Retail Consultant
jodiwatson@gmail.com



The US: looking back at 2020 and ahead to 2021

In the early stages of the pandemic, some forecasted a large decline in the US pet industry. Fortunately, as the numbers begin to shape up for the year, it looks like the forecast is brighter.

Recession-resistant

2020 was a year unlike any other, changing the way we all worked and lived. The pet industry has long been described as 'recession-proof', and when compared to other industries devastated by this pandemic, it has ultimately fared well.

Taking a closer look at the impact of COVID-19 on the pet care community, a more accurate description may be 'recession-resistant', as some businesses

and sectors of the pet industry have been negatively impacted while others have thrived. One thing remains certain – pets have played a significant role in people's overall well-being during these challenging times.

US numbers

In 2019, the APPA Industry Spending Study reported US pet industry spending at \$95 billion (€77.5 billion), with pet food sales taking the lion's share of the market. Projections for 2020 estimated a more modest 3.5%

growth, again with pet food and services experiencing the highest growth. The actual figures will be released in early 2021, but the pandemic's impact has certainly altered APPA's original estimates across various categories within the US market.

Pet food

Pet parents are prioritising their pets' diets like never before. According to the most recent APPA COVID-19 Pulse Study of pet ownership during the pandemic, over half of pet owners consider themselves to be very brand loyal when shopping for food, and 68% agree their pet's diet is very important to them. So they do not plan to make any changes – regardless of their financial circumstances.

Veterinary care and product sales

With an increase in pet acquisition in 2020, the US veterinary industry has experienced a surge. As people spend more time with their pets, owners are more attuned to their health needs. Research from the Human Animal Bond Research Institute shows that when owners understand that their pets' health may be intrinsically linked to their own, it can encourage them to bring their pets to the vet for regular check-ups.

Other services

Some decline is anticipated for non-veterinary services, such as boarding, day care and dog walking. With more people working from home and travelling less, there is a reduced need for these services.

Supplies and OTC medicine

With more pets in the marketplace, sales are tending to increase across all industry segments, including supplies and over-the-counter medicine.

A notable trend in 2020 was the narrowing of the gap between brick-and-mortar and e-commerce sales, with many pet owners shopping online out

of safety precautions. Brick and mortar is still the preferred shopping method overall at nearly 60%, but e-commerce is growing. A few key online-only retailers like Chewy.com and Amazon are contributing to this trend as they are marketing heavily to pet owners, focusing on convenience, big selection, competitive prices and fast shipping options. These retailers are not the only option for consumers, however, as major outlets like Petco, PetSmart and Walmart are increasing their online presence as well.

Looking ahead

Results from the latest APPA COVID-19 Pulse Study show that, for now, pet ownership has not been negatively impacted, and that the approach to routine pet care will largely remain unchanged for pet owners in the US.

Still, with many in the industry calling this a successful year for the pet products market, the potential effects of a larger economic setback remain to be seen, especially if more households become financially challenged and unemployment remains high.

While some categories of spending may be affected more than others, APPA expects that vet care and product sales, as well as pet food and supplies, will increase from 2019, and the industry will be on track to meet or exceed the overall projected figure of \$99 billion (€80.8 billion) spent on pets in 2020. ♦



Steve King
APPA President and CEO
sking@americanpetproducts.org
americanpetproducts.org



Impact of COVID-19 on the Canadian pet industry

The pet market in Canada has seen continual growth for decades, even during challenging economic times. But determining the outcome for 2020-21 is difficult. Despite a welcome influx of new pet owners, ongoing restrictions make life hard for some businesses.

Essential lobbying

In a country divided into ten provinces and three territories, with each region responsible for its own COVID-19 protocol, it has been extremely difficult to determine the regulations needed for businesses to operate properly. PIJAC Canada, the Canadian pet industry trade association, worked closely with the Canadian Federation of Independent Business to successfully lobby regional governments. It pushed hard for pet business to be allowed to deliver much-needed products and services to their clients in-country and abroad.

Smart technology use

Brick-and-mortar businesses have had their fastest evolution in history, as they learned to balance in-person and online experiences.

In a 2020 Packaged Facts survey of the Canadian pet market, 32% of dog and cat owners reported no change in their pet product spending during

the pandemic. With 95% of them strongly agreeing that pets are family, selecting products or services for their companion is an emotional investment. Families appreciate interacting with professionals who care about their pet's well-being. This kinship makes a shopping experience about much more than commerce.

Canadian businesses quickly reacted to the pandemic by adding layers to their existing operations. They made smart use of online technologies (shopping, consultations and training services) to deliver what their clients needed. In doing so, business owners provided a convenient virtual experience while still maintaining the important emotional connection in an industry grounded in community support.

Vital services

Pet services also had to make adjustments. When lockdowns went into effect, pet owners could no longer use health-related grooming services, leaving

them without access to training and behaviour advice for their pets. This brought to light the necessity of these services for both the physical and mental health of Canada's pets, and is an ongoing agenda item for discussions with governments.

Going global

For small to medium size manufacturers, the leap forward in online enterprise opens up a host of opportunities. PIJAC anticipates companies taking advantage of this by branching out beyond regional and Canadian borders through participation in international trade events.

Supporting recovery

COVID-19 has taken its toll on more than just revenues. Business owners are working harder than ever before, and that is contributing to mental health issues. Average recovery time for small Canadian business is projected to be 1.5 years. An effective response to the consequences of the pandemic requires active and targeted government funding measures and campaigns to support local enterprise. It also calls for recovery guidance and plans for a robust and sustainable growth trajectory for this vibrant and competitive industry.

PIJAC anticipates renewed growth in the pet industry post-pandemic, as businesses take what they have learned from the past year and apply that wisdom to future strategies. ♦



Christine Carrière
President and CEO of PIJAC Canada
CEO@Pijaccanada.com
pijaccanada.com



BETTER FOR PETS, PEOPLE AND THE PLANET!

1,000,000+
Bottles Saved

Illustration of two blue water bottles, a right-pointing arrow, and a blue cloud. Below the text is a small dog lying in a blue dog bed.

1,432
Products Donated

Illustration of fast food items: a burger, fries, a hot dog, and a milkshake.

6,832
Pets Benefitted

WARM BELLIES INITIATIVE

Illustration of a dog's face on a wooden cutting board.

Thousands Donated
ifaw Guide Dogs of America

Logo for ifaw (International Fund for Animal Welfare) and Guide Dogs of America.





COVID-19 and developments in the US pet market

2020 was a unique year for the US pet care industry. Despite the challenges presented by COVID-19, it performed quite well.

Sales growth

Retail volume sales for dog and cat food increased by 4.5%, compared to 2% growth in 2019. Value sales growth was 5.7% in 2020, down only slightly compared to 2019 growth. The impact of COVID-19 on the US pet care industry can be seen in three main areas – reflecting both the time and money pet owners have available as well as the pandemic's effect on their shopping behaviour.

Pet population

One of the most important drivers behind the increased pet food volume last year was growth in the

US pet population. With many companies switching to remote work, quarantine restrictions in different parts of the country and a general fear of virus exposure, Americans spent a huge amount of time at home in 2020.

For many, this has been a stressful and lonely time, so consumers have decided to adopt pets in search of companionship. The extra time at home has also been viewed by aspiring pet owners as an opportunity – while pet ownership may have seemed daunting in the past, they now have more time than ever before to train and care for their new pets.

Humanisation and premiumisation

For years, US consumers have shown an increasing willingness to spend more money on their pets. The key shift here is a change in pet owners' attitudes – pets are increasingly viewed as valued members of the family. This can be seen clearly in the types of pet food and products that have become ubiquitous in the industry: refrigerated fresh food, CBD treats, and weighted blankets are all commonplace in an industry that has been impacted heavily by humanisation trends.

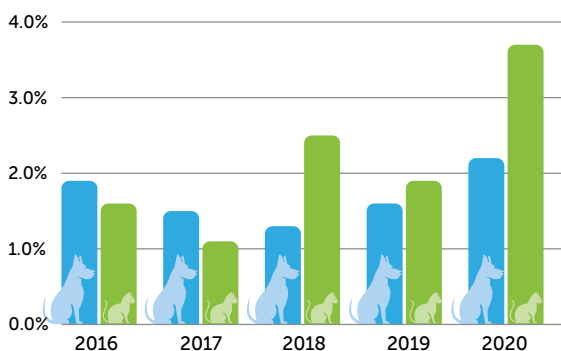
COVID-19 has led to economic hardship for many Americans. Despite this, pet food remains pretty resilient in the face of an economic recession. Premium brands continue to outperform mid-tier and economy brands. Generally, consumers do not want to trade down to lower quality food, even if it saves money. They might even be willing to sacrifice the quality of their own food before they make a change to their pet's diet. So, while some pet owners needed to seek out cheaper food options, many remained loyal to their same trusted brands in 2020, although a significant portion of consumers turned to mid-tier and private label brands in search of better value for money.

Retail channel shifts

In addition to changing the types of pet products purchased in 2020, COVID-19 changed where consumers bought them. Fearing exposure to the virus, many US consumers turned to e-commerce for everyday purchases. With fast shipping and frequent discounts to be found online, a lot of pet owners opted to buy pet food and pet products from internet retailers like Amazon and Chewy. Auto-ship and subscription programmes increased in popularity, as did click-and-collect programmes that allow consumers to purchase online and pick up orders at a store without leaving their cars.

E-commerce is not the only channel to experience the effect of COVID-19. Pet specialty stores and vet clinics struggled, while larger mass retailers gained share in 2020. For those consumers who are comfortable entering stores to do their shopping, many prefer to at least limit the number of stores they go to. Rather than making a separate trip to a pet shop, consumers are choosing to buy pet food at mass retailers where they can buy groceries and other products at the same time. Since many premium brands have launched in the mass channel over the last few years, consumers do not feel limited by shopping for pet food outside the pet specialty channel. ♦

US dog and cat population growth



Source: Euromonitor



Simon Gunzberg
Analyst at Euromonitor International
simon.gunzburg@euromonitor.com
euromonitor.com



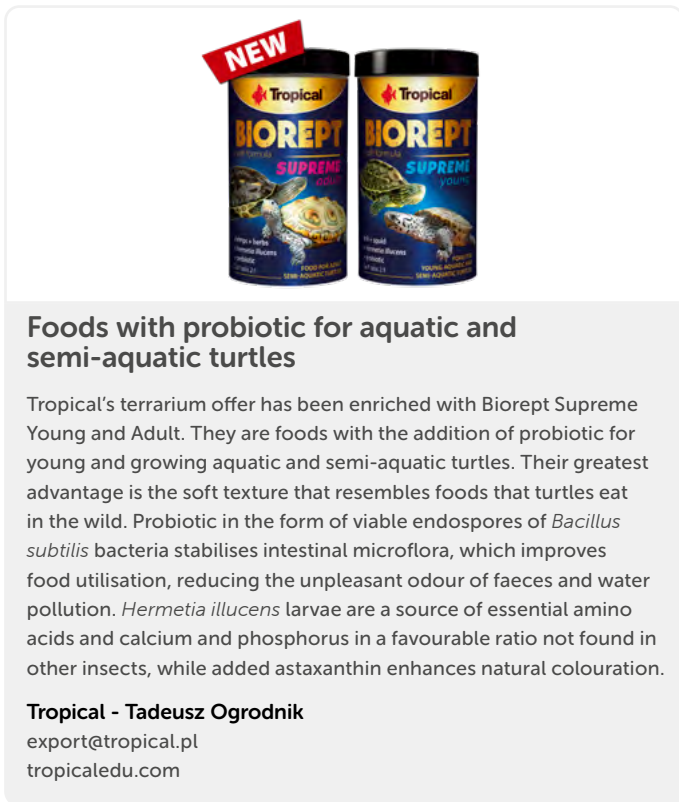
Aqua One®
Inspiring Excellence in Fish Care!

REEFSYS
AQUARIUM

The Aqua One ReefSys series are open top marine aquariums that provide a customisable system, allowing you to establish your personalised underwater oasis.

Available in various sizes.

Aqua One China Co. Limited
For all enquiries please contact us at sales@aquaoone.com.hk



NEW

Tropical BIOREPT SUPREME

Foods with probiotic for aquatic and semi-aquatic turtles

Tropical's terrarium offer has been enriched with Biorept Supreme Young and Adult. They are foods with the addition of probiotic for young and growing aquatic and semi-aquatic turtles. Their greatest advantage is the soft texture that resembles foods that turtles eat in the wild. Probiotic in the form of viable endospores of *Bacillus subtilis* bacteria stabilises intestinal microflora, which improves food utilisation, reducing the unpleasant odour of faeces and water pollution. *Hermetia illucens* larvae are a source of essential amino acids and calcium and phosphorus in a favourable ratio not found in other insects, while added astaxanthin enhances natural colouration.

Tropical - Tadeusz Ogrodnik
export@tropical.pl
tropical.edu.com

Looking for Business Partners?



Find your new business partners via the free accessible, 24/7, online platform Looking For...., of PETS International.

One of the 22,000+ companies can become your business partner!

Go to globalpets.community/network



PETS International
B2B communication and network platform

AVAILABLE 24/7!

In today's world, PETS International B2B communication and network platform is the only one which is 24/7 free accessible, all over the globe.

Would you like to:

- find new business partners?
- promote your new products?

The answer? Use the effective off and online tools of PETS International.

Like to know more about the special friendly priced packages? Send an email to info@pets.nl

globalpets.community/advertise-magazine

Stay up to date with the upcoming events in the pet industry

For the latest event information, check: globalpets.community/events



Contact us

Armenia, Azerbaijan, Belarus, Georgia, Kazakhstan, Kyrgyzstan, Moldova, Russia, Turkmenistan, Ukraine, Uzbekistan

Yulia Dolzhenkova,
Zooinform
+7-4903-6132812
+357-9648-5560
us@zooinform.ru

Austria, Belgium, Finland, Germany, Netherlands, Portugal, Scandinavia, Spain, Switzerland

Miguel Mendes de León,
Agri Cross Media
+31-6-81543366
miguel@agricrossmedia.com

Brazil, Chile, Colombia, Peru

Natalia Coelho de Miranda,
Top.Co. Comunicação
+55-1932318236
nataliamiranda47@gmail.com

China, Hongkong, Macao, Taiwan

Ding Liu
+86-10-88102253
liuding@chgje.com

France, Monaco

Alain Girardet, g i r e x agencies
+33-6-0828-1482
girardet.alain@wanadoo.fr

Greece, Bulgaria, Cyprus

Vassilis Goulielmos,
Welldone Ltd.
+30-211 4021758
info@welldone.com.gr

Italy, Malta, San Marino

Rita Buffagni & Lavinia Fressura,
Mediatic
+39-0522-383620
media@mediatic.it

Japan

Anthony Yamashita,
PETS M&C
+81-736-36-5526
anthony@pets-mnc.com

Poland

Mateusz Karatysz,
+48-51-737-84-03
mateuszkaratysz@gmail.com

South Korea

Hayen Jung, AT Bio Ltd.
+82-31-5341663
atpetfood@hotmail.com

Turkey

Cengiz Gümüş
+90-212-321-10-02
cengiz@ulusalfair.com

United Kingdom, Ireland

Andrew O'Kelly, KOA Media Limited
+44-7973-552381
andrew.okelly@koamedia.co.uk

United States, Canada

Glenn Karaban,
Karaban Media Services, Inc.
+1-212-840-0660
gkaraban@karabanmedia.com

Rest of the world

PETS International &
GlobalPETS Community head office
+31-33-422-58-33
info@pets.nl

Advertisers index

AFB International.....	23	Max Major Ltd - FOFOS	45
Aqua One / Kong's (Aust) Pty. Ltd.....	60	M-Pets	inside back cover
Bacterfield GmbH	13	P.L.A.Y. Pet Lifestyle And You Inc.....	57
De Haan Petfood bv.....	18	Premier Nutrition.....	2
Dokas Handelsgesellschaft GmbH.....	35	Tetra Pak International S.A.	38
Fihumin-Gesellschaft m.b.H.....	4	Tianjin Ranova Petfood Co., Ltd. ...	inside front cover
Hipromine S.A.	22	Tropical Tadeusz Ogrodnik	60
Italfeed Srl.....	37	Tropiclean	43
Jelu-Werk Josef Ehrlner GmbH & Co. / Cosycat	52	United Petfood Producers Nv/Sa	15
Josera Petfood GmbH & Co. KG.....	16	Yantai China Pet Foods Co., Ltd.....	back cover
Laboratoire Francodex	20		

Upcoming issue | Advertising deadline: 5 March 2021 | Publication date: 2 April 2021

See page 5 for subjects. Contact head office (below) or local representatives (page 61).

Colophon

InterMedium Publishers

Prinses Marielaan 12, 3818 HM Amersfoort, The Netherlands
+31-33-4225833, info@pets.nl

CEO: Corine van Winden, corine@pets.nl

COO: Gerard de Niet, gerard@pets.nl

Designer: Jack Waas

Senior editor: Heiny van den Ham

Editors: Lynn Radford, Marita van Oldenborgh,

Martine Croll, Mandy Wolters-Savage

Printing: Wilco, The Netherlands

Technical details

PETS International is perfect bound.

Page/trim size: 208 x 273 mm, live area: 186 x 251 mm.

Supported file formats: PDF, JPG, Adobe Photoshop, high res. (300 dpi)
and full colour. Spot colours are not supported.

ISSN 1388-4638, frequency: 6-7 x per year, since 1988.

Advertisement sizes

Spread: 416 x 273 mm*

Full page: 208 x 273 mm*

Half page vertical:

101 x 273 mm*, 90 x 218 mm

Half page horizontal:

208 x 131 mm*, 186 x 106 mm

For specifications go to globalpets.community/specs

The publisher and editors do not take any responsibility for the contents of advertisements and published letters to the editor.
© Copyrights on contents and lay-out design of published text. No duplication without written approval of the publisher.



Made from
**100% RECYCLED
PLASTIC BOTTLES**



M-PETS™ ECO PRODUCTS

ECO



100% BIODEGRADABLE & COMPOSTABLE

We manufacture products using the best from nature in a sustainable way. We need to care for our world just as much as we do for our pets.

Wanpy®

Global Leading Manufacturer
of Pet Treats

Wanpy Europe Petfoods by

Mr. Martien van Bohemen

Tel.: +31 (0) 6 23375988

martien@wanpy.eu

Lickable & Creamy Cat Treats



No Preservatives
NO COLORANTS



Healthy Digestion
EASY TO ABSORB



Shiny
COAT

