



# PETS International

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## Food and Ingredients

Pulses, nutraceuticals, omega-3s,  
proteins out of rendering.

## Accessories

Pet-friendly materials.

## German-speaking countries

Facts and figures.



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## Highlights this issue



10

### Food and Ingredients

What makes a healthy pet diet? Various pet food ingredients – pulses, nutraceuticals, proteins, vitamins and minerals, omega-3s – are highlighted. What are the benefits and risks? And what can pet food manufacturers do to support climate and sustainability goals?



28

### Accessories

When it comes to materials in pet products, the right choice can be difficult. The needs and wants of pets, their owners and our environment should be addressed. A look into allergy-free, innovative and recycled products.



38

### German-speaking countries

The German-speaking markets represent a big part of the European pet industry. Some facts and figures are presented. How has the pandemic affected the pet market in Germany? Two major players explain how their businesses are developing.

## And further in this issue

Editorial .....	3	Calendar of events   Contact us .....	51
Upcoming issue .....	5	Advertisers index .....	52
Pet industry highlights .....	6	Colophon .....	52

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# Sustainability first!

We would like to share with you that, as of 1 March, Corine van Winden has handed over the reins of PETS International and all connected activities, including GlobalPETS Forum, to the newly appointed Managing Director, Philippe Vanderhoydonck.

After running a B2B marketing agency for many years, Philippe is excited about continuing the mission of informing, inspiring and connecting professionals in the global pet industry online and offline. Corine will stay involved as a strategic board member and work with Philippe to ensure a smooth transition. She will support and guide the company in its strategic direction, and will still contribute to the organisation of GlobalPETS Forum in Europe and Asia.

This magazine is packed once again with interesting information and inspiration. Today's dominant trend is undeniably: putting sustainability first. That is also seen in the use of alternative ingredients such as herbs, pulses and vegetables. And new 'trendy' ingredients like these invariably lead to studies to determine their effect on a pet's health. Findings show that they do, indeed, contribute to good health.

Besides alternative ingredients, there is a call for sustainable packaging and a reduction in plastic use. More and more pet food producers are searching for alternatives. Many pet accessories are made of plastic too, so manufacturers are increasingly innovating their production processes by using reclaimed plastic. But it is just as important for accessory companies to start thinking about sustainability and circular economy principles during the design process. Is it possible to replace plastic components with natural materials?



Or to create the product in such a way that it can be easily recycled at the end of its life cycle?

In the last section of this issue, we turn the spotlight on the German-speaking market. There are currently significant shifts within the pet industry between brick-and-mortar retailing and online platforms. To gain a deeper understanding of that phenomenon, we talked to Fressnapf as well as Kölle Zoo.

*Philippe & Corine*

Philippe Vanderhoydonck, Managing Director  
& Corine van Winden, Board member

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## Global developments & trends

Online, offline and omnichannel  
 Experience with B2B online platforms  
 Exclusive brands

Hemp products

Pro-biotics  
 CBD oil

Vegan pet food

Regulations  
 Plant-based ingredients

May issue | Advertising deadline: 6 April 2021 | Publication date: 4 May 2021

Contact head office (see page 52) or local representatives (see page 51).

## Pet industry highlights



### Interzoo

1 to 4 June 2021

Digital

[interzoo.com/en](https://interzoo.com/en)

### SuperZoo

17 to 19 August 2021

Mandalay Bay, Las Vegas, US

[superzoo.org](https://superzoo.org)

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



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## Best sales growth ever for Fressnapf Group in 2020

The Fressnapf Group ended 2020 with total annual sales of €2.65 billion (\$3.15 billion). This is an increase of €351 million (\$417 million), or 15.2%, compared to the previous year:

'We can report the highest absolute sales growth in the company's history, both offline and online. We are growing faster than the competition.'

For the first time, sales of more than one billion euros were achieved in the international business done by its ten German subsidiaries. This total of €1.09 billion (\$1.29 billion) corresponds to a growth of 20.3%, or €183 million (\$217 million).

In the core market in Germany, annual sales totalled €1.57 billion (\$1.86 billion) – an increase of €167 million (\$198

million), or 11.9%. Growth in the existing sales area shows a year-on-year increase of 13.2%.

The most significant growth driver last year was the online channel: sales up by 45%, or €50 million (\$59.4) to around €160 million (\$190).

This year, there will be an investment offensive of more than €70 million (\$83 million) from the company's own resources: 'We are planning more than €40 million (\$47 million) for the expansion of over 100 new locations in Europe, and are providing additional funds for possible acquisitions.' Fressnapf will focus in particular on France, Italy, Poland and Denmark. More than €30 million (\$36 million) is being invested in the expansion of the online channel in all eleven countries.





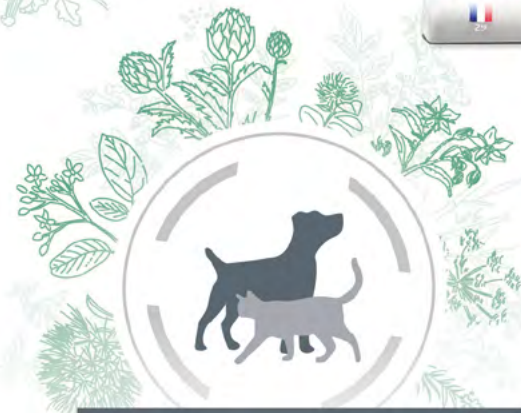
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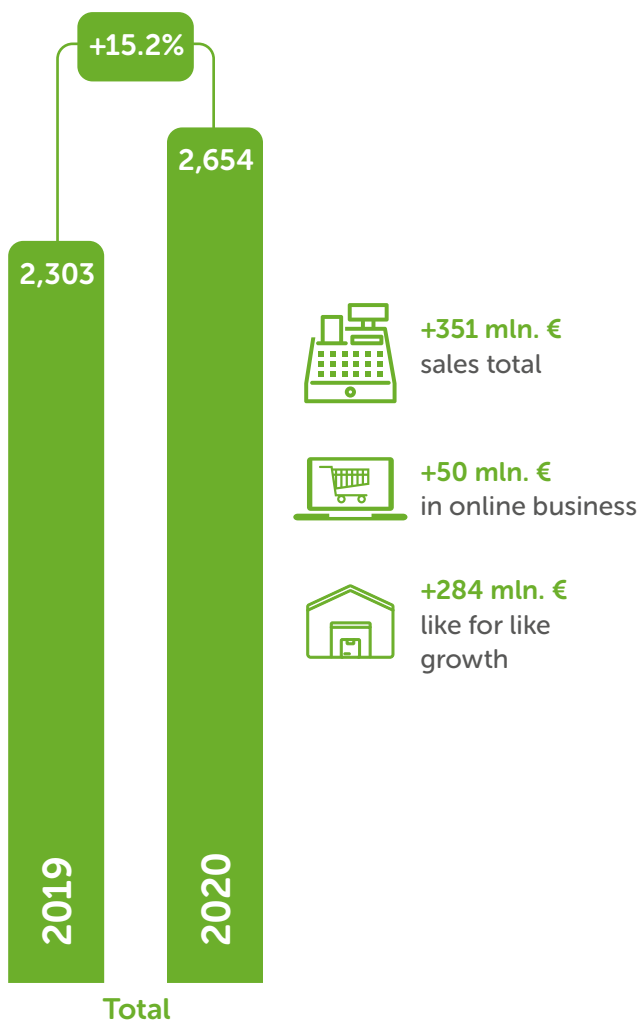
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Correspondence may be edited for clarity or length.

### Customer champion: No one is growing stronger than Fressnapf

Sales gross in mln. € incl. online compared to PY



Source: Abstract Press Conference 24 February 2021

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## Pet industry highlights

### New generation to take the lead at Prins Petfoods

Lies Verkade and Wil Mulders are stepping down as board members of Prins Petfoods to make way for a new generation of business leadership. They will remain closely associated with the family business as shareholders and advisers. Business management will be transferred to Mariska van Gelder, Marlou Mulders and Gertjan Willems.



### IQI appoints Mark Oostendorp as CEO



Mark Oostendorp has been appointed as CEO of IQI Trusted Petfood Ingredients. His mission includes giving further shape to the company's strategic choices and continuous improvement of added value within the total supply chain. He brings more than 25 years of leadership experience in the fields of food, agriculture and biotechnology, having previously worked in various senior management roles.

### Acquisition of Brazilian pet food manufacturer FVO

H.I.G. Capital has completed the acquisition of FVO – Brasília Indústria e Comércio de Alimentos LTDA., a leading pet food manufacturer founded in Brazil in 1967. FVO operates five industrial facilities and nine distribution centres, covering all 27 Brazilian states.



### CROCI (Italy) buys Canifrance



The Croci Group has bought the French firm Canifrance, which was founded in 1946. Canifrance is specialised in top-quality dog and cat collars, and has an annual turnover of approximately €5 million (\$6 million). The acquisition is a further step in the Croci Group's internationalisation. Group turnover in 2020 was €36 million (\$42.8 million).

### United Petfood acquires Cambrian Pet Foods (UK)

United Petfood has acquired Cambrian Pet Foods. The acquisition strengthens the position of United Petfood as full-service private label pet food producer. Cambrian Pet Foods (1982) is a family-owned company specialised in private labels and has a leading position within the UK pet food market.



### Vafo Group opens Czech pet food plant and invests in Finland

Petr Kříž, member of the board of directors, and also head of mergers and acquisitions, says the pandemic has not slowed down the company's growth, as the pet food industry has proven resistant to the negative impacts of COVID-19.

Vafo is also developing its presence in the Nordic countries with its recent acquisition of Finnish pet food producer Prima Pet Premium Oy. The company plans to invest between €7 and €8 million (\$8.5-9.7 million) to build a new dry pet food factory in southern Finland.







# Food and Ingredients

A recent survey shows that the COVID-19 pandemic has increased owners' concerns about the health and wellness of their pets. This section highlights various pet food ingredients that could make a difference to well-being – proteins, pulses, nutraceuticals, omega-3s – and explores the pet industry's role in achieving sustainability goals.

The influence of pulses on pet health	12
Nutraceuticals for pet food	15
Proteins out of rendering	16
The EU Green Deal and the pet industry	18
Büngener Pet Health GERMANY	19
Sustainability of pet product packaging: a peek into the necessity	20
Is immunity a new trend?	23
The importance of the right omega-3s in a pet's diet	25
COVID-19 fuels growth in US pet supplements market	26

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# The influence of pulses on pet health

Understanding the benefits and potential risks of pulses in pet diets.

## FDA report

A report from the FDA in July 2018 caused significant interest in dilated cardiomyopathy (DCM). The report suggested that the incidence of DCM was increasing in dogs and that it was associated with the rise of grain-free diets, specifically due to ingredients such as 'peas, lentils, other legume seeds or potatoes'.

Grain legumes or pulses – such as beans, peas, lentils and chickpeas – are generally higher in protein than



traditional grains (for example corn, wheat, rice). Pulses also fill an important sustainability niche by fixing nitrogen in soil. But are they healthy for pets?

### Are pulses healthy for pets?

Research in dogs indicates that lentil- and pea-containing diets tend to delay the glycaemic spike following meal consumption compared to diets containing rice flour, corn flour and cassava flour. In cats, diets containing lentils and peas resulted in more favourable glucose and insulin events following meal ingestion than corn-based diets. Consumption of lentils by both dogs and humans tended to slow gastric emptying, which perhaps explains why pulses may attenuate the glucose spike following a meal. Palatability and stool quality of dogs was maintained in the case of diets containing up to 20% fava beans.

### Studies

While the understanding of the impact of pulses on dog or cat health is still limited, a rather large body of evidence exists for their impact on human health.

A four-year-long study tracked the incidence of diabetes in over 3,000 humans. The results indicated that increased consumption of total legumes – and specifically lentils – was significantly associated with decreased occurrence of type 2 diabetes. Increased consumption of chickpeas also tended to be associated with decreased incidence of type 2 diabetes.

A review of 21 studies comprising nearly a thousand individuals was undertaken to determine the impact of pulse consumption on various obesity characteristics. Across all studies, an average of 0.34 kg in body weight was lost within a six-week period. Further, six of the studies provided evidence of body fat reduction linked to pulse consumption. Given these results, it is not surprising that a review of nine clinical trials revealed that consumption of pulses improved satiety.

### Brain response

Scientific literature has shown that events in the gut provide feedback to the brain. A recent review of five studies suggests that consumption of pulses changes the composition of large intestine microbiota. While speculative, it is possible that changes in the gut microbiome elicit a satiety response by the brain.

### Conclusion

Pulses play an important sustainability role, plus research data from pets and humans indicates that pulses provide important health benefits related to obesity and diabetes. It remains to be seen whether the ongoing DCM debate will hinder access to the health benefits of pulses for pets. ♦



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# Nutraceuticals for pet food

Which key issues must be addressed in order to make claims about the benefits?

## What are nutraceuticals?

'Nutraceutical' is the commonly used term for herbal ingredients, plant and animal extracts, many of which have been used for millennia in both human and animal feed to achieve certain benefits, such as optimising organ function (liver, kidneys), aiding digestion, preventing joint degeneration and inflammation and even improving mood and behaviour.

In the last 20 years, there has been great interest in utilising various nutraceuticals in pet food to allow manufacturers to make specific claims. However, certain key issues – including animal safety, efficacy and legal considerations – must be addressed before they can be incorporated into pet food.

## Do they work?

Manufacturers should select the nutraceutical ingredients based on what claims they wish to make (for example training, weaning, senior, coat, joints, et cetera). Research must always be available to back up those claims.

Nutraceuticals are typically divided into three forms: dry powder from a named part of the plant or animal, oil extract or water extract. These forms and the part of the plant used can influence digestion, uptake and efficacy, so it is essential to conduct a thorough search of published scientific data to ensure that the effective dose to produce the claim fits within the product formulation and the processing method. For example, more oil may make kibble crumble.

If pet food manufacturers are using more than one nutraceutical, they should make sure these are compatible. In addition, any contraindications with other ingredients or pharmaceuticals and LD50 toxicity values must be taken into account.

## Legal situation and registration

Many nutraceuticals lack essential data to support them. These should be treated with caution and preferably avoided, especially those whose use in human products is restricted in some countries. In many countries, certain nutraceuticals are not on Generally Recognised As Safe (GRAS) lists or may need specific registration for claims beyond nutrient delivery.

Manufacturers should always check that nutraceutical suppliers have the correct documentation to ensure that the material is not contaminated (for example with heavy metals in the case of ocean-sourced material) and that it does contain the expected levels of active compounds.

If overconsumed, some nutraceuticals may cause severe problems (for instance valerian which slows down heart rate). To prevent this, any treats or food which contain nutraceuticals should be marked with appropriate cautionary labelling. ♦



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# Proteins out of rendering

## What are the key elements in obtaining high-quality proteins in the rendering process?

### Sustainable utilisation of animal by-products

Rendering is the best available control technology to ensure the sustainable utilisation of animal by-products such as poultry, a third of which is not intended for human consumption.

### Regulation

Governmental institutes regulate the processing of food and feed, and the rendering industry is frequently vetted. In addition, actions of the industry include good manufacturing practices, HACCP and many other certifications. Material is classified into three categories in the EU Regulation (EC) No. 1069/2009 (Regulation on animal by-products) based on the risk involved. So-called Cat-3 material mainly comprises waste materials and by-products from slaughterhouses

that are fit for human consumption at slaughter but no longer intended for it.

### Procedures for rendering

Unprocessed animal by-products (meat, blood, feathers, bones, heads, feet and viscera) contain a broad range of microorganisms, including pathogenic bacteria, that can proliferate and pose a potential threat to animal and human health as well as to the environment. The rendering of animal by-products is very beneficial to eradicate these microorganisms.

Each rendering product has different standards and its own process to produce value-added products. Temperature and duration of cooking are the most crucial factors, besides the high level of hygiene.

**Table 1:** Dietary composition of different feed ingredients

	CP	CL	CF	CA	Moisture	Ca	P	Lys	Met
BSFLM <sup>1</sup>	42	33	7	15	4.7	7.5	0.9	6.5	1.9
FM <sup>2</sup>	69	7	7	8	8.4	4.3	2.8	7.5	2.7
SBM <sup>3</sup>	46	1	3.4	6.6	11	0.4	0.7	2.6	0.5
PBM <sup>4</sup>	68	13	-	16	2	5	2.8	4.4	1.3

<sup>1</sup> BSFLM = Black Soldier Fly Larvae Meal; <sup>2</sup> FM = Fishmeal; <sup>3</sup> SBM = Soybean Meal; <sup>4</sup> PBM = Poultry By-Product Meal



## To go beyond is

producing valuable poultry proteins and fats as raw material in diets for dogs and cats.



### Protein and fat in pet food

The most important protein products in pet food are poultry meal, meat and bone meal and feather meal. Furthermore, there are special products such as spray-dried protein concentrate, liver meal or egg powder from species such as turkey and duck. Fats are also produced in the rendering process, with varying contents of free fatty acids, quality levels and commercial characteristics.

Table 1 shows a comparison of the dietary composition of animal-source proteins such as poultry meal, fishmeal and insect meal with a plant-based protein like soybean meal.

### What is the best protein source for pet food?

Animal-based proteins are generally more balanced in terms of amino acids than proteins of plant origin and should be the preferred protein sources in a high-quality diet. Animal-based products are also a sustainable alternative to soybean meal in the context of ethical aspects relating to deforestation. Insect meal has a hypoallergenic aspect in pet nutrition and, in line with recent thinking, has the potential to play a key role in protein production in terms of consistent quantities, high quality and supply stability. However, the current price of insect meal is still not competitive with other protein sources such as fish and poultry.

Since each protein has its own advantages, a combination of all of them is the best solution in animal nutrition. ●



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# The EU Green Deal and the pet industry

How pet food manufacturers can support the EU's climate policies.

## Ambitious policies

The European Union (EU) is fighting climate change through ambitious policies. The European Commission's proposal to cut greenhouse gas (GHG) emissions by at least 55% by 2030 sets Europe on a responsible path to becoming climate neutral by 2050, and all sectors of the economy and society – including the pet industry – have a role to play.

## The environmental impact of the pet industry

The pet food industry is very mindful of its role in the responsible use of limited and renewable resources in its production activities, including minimising the environmental impact. FEDIAF, the EU pet food industry federation, has been supporting several actions developed by the European Commission (EC) in the context of the EU Green Deal, such as the Circular Economy Action Plan and the Farm to Fork Strategy.

Pets bring numerous benefits to society, such as by instilling responsibility, encouraging social awareness and contributing to people's well-being. Members of the pet food industry have a responsibility to strike a balance between the social and environmental aspects of sustainability so as not to compromise the viability of pets for future generations.

## Upcycling surplus products

One important aspect of the pet food industry is the fact that it upcycles surplus products from the human

food chain. The animal-based ingredients used in pet food cannot be used in human food for reasons such as popularity, cultural preferences or appearance. However, these valuable ingredients are safe and nutritious for pets. Furthermore, using by-products from the human food chain in pet food rather than disposing of them contributes to the circular economy by reducing food waste.

Some plant-based by-products such as grains and vegetables are also used in pet food manufacture and this represents a major opportunity to reduce GHG emissions. Therefore, the pet food industry is constantly looking for alternative proteins that ensure healthy, nutritious and high-quality food whilst reducing the environmental footprint of the products.

## Environmental footprint

In terms of measuring the environmental footprint, FEDIAF developed the Product Environmental Footprint Category Rules (PEFCR) for pet food in 2018, which has been endorsed by the European Commission. It gives clear guidelines for calculating the environmental footprint of prepared pet food products for cats and dogs – from 'cradle to grave' – and will help companies to evaluate and better understand the most relevant environmental effects. ♦



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## Long track record

Büngener Pet Health is a German company that specialises in pet health research and the manufacture of nutraceuticals and pet health solutions. Mr Hans Jochen Büngener, founder and CEO, has a long track record in animal health research and pet food development. He first served as CEO of an animal welfare research company at the age of 24. From the late 1960s until the end of the last century, he managed several leading companies in the pet food industry and held C-level positions in key organisations. On top of that, he served as chairman of the Interzoo Organizing Committee for over 30 years and is currently honorary chairman.

## Research and development

Although the company is still young, having officially started in 2019, the owner

and his colleagues have over a hundred years of combined knowledge and experience in the field of animal and pet health research and development. Based on this scientific expertise and research, they are developing high-quality pet food and supplements that contribute to health improvements in the various life stages of dogs and cats.

## International position

The company's products are currently available in over 2,000 stores and veterinary clinics in 15 countries throughout Europe and Asia, including Spain, Greece, Cyprus, China, Hong Kong, Taiwan, Kuwait and the United Arab Emirates.

Büngener Pet Health is headquartered in Germany and also has a facility in Spain. Thanks to a central warehouse in Hong

Kong as well as in Germany, smooth and timely deliveries are guaranteed.

## Innovations

In partnership with its master agent, Büngener Pet Health presented its latest innovations – including the pH6 wet food range and the high fresh meat & vegetable dry food line – at CIPS 2020. In fact, the firm won the CIPS 2020 Innovation Award with the Essence Paste Adult for Cats product. Needless to say, these innovations will also be presented at the digital edition of Interzoo 2021 and at Zoomark 2021. ◆

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# Sustainability of pet product packaging: a peek into the necessity

## How is the shift in consumer preferences away from plastic affecting the packaging of pet products?

### The demand for plastic packaging

The demand for plastic for use in packaging is continuing to grow steadily from various industries in China, Europe and the US. Thanks to cost-effectiveness, versatility and now also the emphasis on hygiene, plastic is winning as a packaging material. However, the packaging industry is under pressure to offer alternatives now that sustainability has become a buzzword.

### Is the sustainability-consciousness for packaging pet products sustainable?

Customers are increasingly label-conscious shoppers for all their purchases, including pet products. Pet owners tend to care as much for their pets as they do for their kids. This means that they show little hesitance to opt for premium pet products – whether pet food, pet accessories or anything else.

Given this shift in consumer behaviour, manufacturers of pet products are targeting the premium market. One area of emphasis is the packaging, since cardboard and metal packaging materials can make the pet product look appealing and add a premium feel. It would be unfair to say that this has made plastic redundant as a packaging material.

However, today's consumers also prefer products that are good for the environment as well as for themselves. This implies that plastic is a strict 'no-no' – and this sustainability trend increasingly extends into the pet product category too.

### What are the ideal solutions for sustainable packaging?

Packaging of pet products has several underlying conflicts. Sustainable packaging material is not

## Food and Ingredients

cost-efficient. Cheaper packaging material is not sustainable. Cheaper and sustainable packaging material is not durable. In order to develop attractive packaging at a lower cost with a high sustainability quotient, manufacturers are striving to increase the content of recyclable material in their plastic packaging.

For instance, TerraCycle introduced a zero-waste solution for pet food packaging. The waste is collected manually and is then separated into recyclable and non-recyclable types of plastic. The recyclable plastic undergoes extrusion and pelletisation for use in manufacturing new recycled plastic products such as packaging for vitamins and pet treats.

Pet owners in developed countries often have more than one pet, which implies they need to buy at least twice the amount of pet products. This encourages bulk purchases, which is actually a positive development in the context of sustainability since it reduces the amount of waste generated. Stimulating

bulk buying of pet products helps customers to not only benefit from lower costs but also to contribute to sustainability.

### Innovation in pet product packaging is evolutionary

In contrast with the fast pace of product innovations, packaging innovations are usually limited to recycling, and only for the most popular products. However, since pet products are a necessity that generate a huge volume of waste, there should be a greater focus on the packaging materials used.

The insights presented here are based on a study by FMI on the pet care market. ♦



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# Is immunity a new trend?

## How can vitamins and minerals play a role in improving pet immunity?

### Humanisation

The pet humanisation trend continues, with a growing number of pet owners treating their pets like themselves. Especially during the current pandemic, pet owners have become more concerned than ever about both their own immunity and that of their pets. This is leading to the increased popularity of meat varieties in diets (such as duck, rabbit, turkey, veal, cod and trout, to name but a few) and the choice for hypoallergenic protein sources.

### Caring about pet health

Pet owners want to feel that they are doing all they can to prioritise their pets' well-being, so nutritional parameters are not all they care about. This is driving the growth of functional diets, supplements, different snacks, toppers and even water enhancers in the pet market. They contain 'trendy' healthy ingredients, such as vitamins and minerals, yeast-based ingredients and various herbs, berries and oils that may influence pet health. These trends, which initially started mainly in the US market, are now also widely developing in Europe.

### Immunity support

Immunity support is vital nowadays, which is why Kormotech launched the Optimeal brand five years ago. Immunity support is at the heart of this brand concept thanks to unique diet recipes and a special Immunity Support Mix (ISM) complex. ISM includes purified beta-glucans, prebiotics, herbs, berries and natural antioxidants (based on rosemary extract).

### The science behind ISM

- Purified beta-glucans: These are natural compounds found in the yeast cell walls. Due to their special structure, beta-glucans stimulate leukocytes which help build up the immune system and protect the body against pathogenic microbes.
- Prebiotics (MOS): These limit the colonisation of pathogenic bacteria and harmlessly remove them from the pet's body. This maintains the balance of beneficial microflora in the pet's gut and supports healthy digestion.

Optimeal diet substances (including omega-3 and 6, zinc and biotin) have a positive effect on the health of the pet's skin and coat as well as supporting joints, vision and brain development. Combined with the unique Immunity Support Mix complex, it will definitely improve the well-being of pets and support their immune system.

### R&D is vital

The Kormotech R&D team is continuously working to further improve the ISM. Cooperation with specialised ingredient producers and research institutions is a vital part of this. A new release of Optimeal ISM can be expected in the course of 2021. ♦



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# The importance of the right omega-3s in a pet's diet

To ensure that pets can regularly benefit from this important nutrient, it is crucial to choose a pet food that contains the right source of omega-3.

## Not all omega-3s are the same

Omega-3s have many proven health benefits for dogs, cats and humans alike, but they are not all utilised in the same way. The most important types of omega-3s are ALA, EPA and DHA. ALA is mostly found in plants, and EPA and DHA are mostly found in marine sources such as krill, algae or fish.

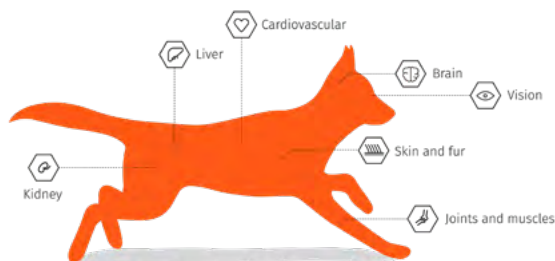
To have a positive health effect on a pet, ALA from plants must be converted into EPA and DHA inside the animal's body. Since this conversion rate is less than 10% in dogs and cats, plant-based omega-3 is not very efficient. However, marine-based omega-3s are already in the correct form as EPA and DHA. Therefore, they can be used directly without conversion, thus providing a much more efficient health benefit.

## The role of phospholipids

One such marine-based source is krill: tiny crustaceans present in all oceans. In fact, krill represents a superior source of omega-3s because – unlike the omega-3s found in fish, which are carried by triglycerides – EPA and DHA from krill are carried by phospholipids. Phospholipids are structural components of cell membranes in pets such as dogs and cats. Therefore, omega-3s from krill are incorporated into the pet's body cells more effectively than omega-3s carried by triglycerides in fish. Recent studies have also shown that phospholipid-bound omega-3s from krill are more effective in raising the omega-3 index (EPA and DHA

in red blood cell membranes) in a dog's body when compared to triglyceride-bound omega-3s, such as those found in fish oil.

Once in place in the cell membrane, the omega-3 phospholipids EPA and DHA support the health of several vital organs, including the heart, kidney, liver, joints, brain, eyes, skin and coat.



## Krill – one ingredient, many benefits

Krill is a premium omega-3 source that naturally contains astaxanthin and choline, supporting cell integrity, immune function, cognitive function and muscle function in an active and vital dog. This makes it a unique marine ingredient with several key nutrients beneficial for pets at every life stage. Moreover, krill is sustainable, traceable and sourced from some of the cleanest waters on Earth. ♦



**Tonje Dominguez**

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qrillpet.com



# COVID-19 fuels growth in US pet supplements market

**The COVID-19 outbreak is driving strong growth in the sale of pet supplements in the US.**

## Growth surge

As well as triggering a pet adoption boom, the stay-at-home/work-from-home COVID-19 era has heightened owners' concerns about pet wellness. As a result, pet supplement sales in the US surged by 21% in 2020 to nearly \$800 million (€661 million), following several years of growth in the 3% to 5% range.

Dog owners traditionally purchase the majority of pet supplements, spending more than four times as much as cat owners. However, new developments in delivery options and an increasing understanding of the role of nutrition in overall feline wellness have increased cat owner receptiveness to pet supplements such as cat treats.

## COVID-19 has increased owners' concerns

A survey by Packaged Facts in November/December 2020 shows that 41% of pet owners are paying closer attention to pet health and wellness because of COVID-19. The top concerns include anxiety (21%) and immunity (19%). Additionally, 14% of pet owners have changed the healthcare products they buy for their pets and 12% have begun giving their pets supplements since COVID-19.

## Overlap between human and pet supplement markets

Among US adults overall, 67% take supplements. Among pet supplement buyers, however, 87% of dog owners and 86% of cat owners take human

### Pet health and wellness concerns as a result of COVID-19 (percent of pet owners)

Am especially concerned about my pet's anxiety/stress.	21%
Am especially concerned about my pet's immune system health.	19%
Have made changes to the healthcare products I buy for my pets because of COVID-19 health and wellness concerns.	14%
Am giving my pet supplements related to COVID-19 health and wellness concerns.	12%

Source: Packaged Facts November/December 2020 Survey of Pet Owners



supplements themselves. This illustrates a clear overlap between the human supplement and the pet supplement markets. Pet supplement marketers are therefore well advised to closely follow product and ingredient trends in human supplements. Evidence of this can be seen in the earlier trend towards omega-3 or chondroprotectives for joint health as well as the current CBD craze. Purchase rates for CBD pet supplements run twice as high among pet owners who use CBD supplements themselves.

**Market competition**

Pet supplement marketers compete along two major fronts: against established companies fielding mainstream types of supplements in conventional channels, and against fast-moving and typically e-commerce-based entrepreneurs marketing CBD and hemp products. Buoyed by CBD product sales success, these newcomers are broadening out from CBD products to more mainstream formulations and ingredients.

Several of the major pet market mergers and acquisitions that took place in 2019 and 2020 involved pet supplements. In addition, the pet supplements market has seen a peak in expansion-related activity, with marketers entering into new partnerships, expanding into new retail channels and revamping brand lines. Just as in the rest of the pet products market, e-commerce has surged and channel lines have blurred. The current survey data indicates that 40% of pet supplement purchases occur via online retailers, 34% on marketer/brand websites and 24% via smartphone apps. ♦



**David Sprinkle**  
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# Accessories

With an undiminished focus on pet well-being, the industry is looking to maximise the use of non-allergen materials. Similarly, the search is on for using materials that support the well-being of our planet. Meanwhile, innovative materials are being embraced by the pet industry.

Pet-friendly materials	30
Pet-friendly materials for allergic pets	33
Zolux FRANCE	35
The benefits of recycled materials in pet accessories	37



# LIGHTS, CAMERA, ACTION!

## Pet-friendly materials

Soft and welcoming, or solid enough to withstand some claws or teeth? When it comes to materials in pet products, the right choice can be difficult.

### Pet-, parent- or eco-friendly?

Choosing the right materials for pet products can be challenging. Firstly, there is the pet dog who is likely to prefer soft and comfortable material for its bedding. Secondly, there is the pet parent who might be worried about the destructive power of claws or teeth in anything soft. And thirdly, there is the increasingly important environmental perspective.



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### It all starts with the design

At the very basis of any choice for a certain material, lies the design of a product. Product design should address the needs and wants of pets, their owners and our environment. Importantly, the choice of material is also important from an animal well-being point of view. Pets can suffer from allergic reactions to materials used for bedding, toys or halters.

### Right materials and smell

Besides the feel of a material, pets are particularly sensitive to smell. They might not take to certain products with, for them, an unpleasant smell. As a result, a super-soft cover just purchased for the cat can be totally rejected by the receiving party. Similarly, cleaning or washing pet toys or bedding with strongly smelling detergents or spraying them with fragrances could mean your pet loses interest in them.

Water-repellent materials are the ideal solution for kennels, cushions or bedding on the floor. Essential is the choice of quality products that offer the option to remove and wash the outside easily. Non-removable covers are usually only made to save on production costs.

As for the currently trendy 'furry' materials: these are prone to harbour mites and dirt. Often, also, they are not washable. Similarly, cat tree bases, covered with fabric that cannot be removed, quickly become dirty and damaged. Leaving the pet owner no other choice than to throw it away. A not particularly eco-friendly and expensive solution.

### Recycled and natural materials

Materials such as real fur are now rightly banned from the pet world. The trend is to use synthetic and recycled materials instead. Another option is all-natural materials. For instance, a rattan ball, rather than one made from non-recycled plastic.



Last-but-not-least, choosing for natural materials like, for instance, untreated wood furniture for the cat, enables the pet to thrive in a natural habitat. His primordial instincts benefit, as does the pet parent: with a happy pet. ♦



**Monica Ferrigno**

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# Pet-friendly materials for allergic pets

The modern pet world is focused on animal welfare. Yet allergies can be the cause of great suffering for pets. So, what considerations are important for the pet industry when it comes to supplying allergy-free products?

## What causes an allergic reaction?

With allergies, the immune system reacts or is sensitive to a particular substance (allergen): usually proteins from plants, insects, animals or foods. In dogs, their skin can itch, swell, or they may cough, sneeze and wheeze, lose fur, or may even vomit or get diarrhoea. It is essential that, in such cases, pet owners seek veterinary advice. After all, symptoms can also be caused by a large number of other medical conditions.

## Pet beds to help with allergies

Pets can be allergic to dust mite debris. Beds made from naturally hypoallergenic materials, including high-density foam (medical grade or memory foam), makes it harder for dust mites to thrive in such a habitat.

The PetFusion Ultimate Dog Bed has been designed in such a way that it is possible to detach every part of the bed, making it exceedingly easy to wash frequently. As for fabrics: cotton, hemp or tightly woven micro-fibre fabric are less likely to cause problems. On the other hand, synthetic fabrics manufactured using certain chemicals, such as flame retardants, are known to be allergenic.

Collars, harnesses and leads can also be designed to prevent sensitivities from developing. A softer collar,

such as a cotton or hemp design, rather than nylon or webbing, is an allergen-friendly option. Not only are they less likely to cause an allergic reaction, but they are also easy to wash and less likely to irritate a dog's fur when this may already be sensitive for other reasons.

## Anti-allergy pet toys

Toys with soft stuffing may harbour dust mites, so need frequent washing and must be durable. A flat dog toy, such as the Beco Stuffing Free range, is allergen-free and still fun for the dog. Chew toys containing ingredients such as sweet potato may be considered for a dog on an elimination diet. On the other hand, chew toys such as the PetzPoint Orb are specifically designed to be allergen-free.

## Steel bowls

Although rare, some cats can be allergic to plastics. Such an allergic reaction causes irritation around the mouth. In such cases, steel bowls are preferable. ♦



**Karen Wild**

Dog trainer and pet behaviourist  
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# Taking action today for a better tomorrow

Why waiting with embracing Corporate Social Responsibility is not an option.

## Sustainability as a top priority

Sustainability is one of the top priorities at Zolux Group. The group of companies aims to bring eco-friendly solutions, that contribute to the environment and social good, for pets and their pet parents.

## Three CSR pillars

The group's Corporate and Social Responsibility strategy, named 'Horizon', is based on three pillars: animal well-being, employee well-being and environmental impact. They point the way for immediate action within the pet accessories and food industry.

### 1. Good for my pet

Zolux Group aims to guarantee the quality, sustainability and user-friendliness of their products, in order to boost pet well-being and safety. It starts with paying attention to what the group uses as raw materials.

All the company's nutritional products are veterinarian approved, and 100% of their new products comply with their eco-design guidelines. Through the Zolux consumer panel, La Tribu, pet parents are also involved in the choice of materials and products – from the design stage through to the end-product.

### 2. Happy in my work

Today, Zolux employs over 400 employees across ten production and distribution sites, throughout the

world. Still a family business, the same down-to-earth values count as they did when the company was first founded.

Every year, employees are asked to take part in an anonymous satisfaction survey. Survey results form the basis of Zolux's human resource strategy that is aimed at fostering professional well-being. Employees are encouraged to continually develop their skills. In this way, the company and its people are able to adapt and apply existing know-how and newly acquired digital competencies to meet the challenges of an ever-changing world.

### 3. Better for my planet

When it comes to the protection of our planet, Matthieu Haurit, CEO at Zolux is clear: "Waiting is not an option: immediate action is what is needed." It is why all efforts undertaken by the company are focused on reducing their environmental impact.

Zolux sources 80% of the products within Europe. It is the intention to maximise this percentage. But the group's CSR strategy also focuses on innovative eco-design and life-cycle assessment of all their products. All this with the single goal to make the best pet products with the smallest ecological footprint. It is all about taking action today, for tomorrow. ♦

- ♦ [Zolux Group S.a.s.](https://en.zolux.com/csr-horizon)  
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# The benefits of recycled materials in pet accessories

With sustainability as the top priority for many pet accessories brands, producers are innovating to use more recycled materials.

## Booming market, short-term use of pet toys

The pet accessories market is booming. In a recent survey by Pets International and Yummypets, 65% of pet owners said they buy new pet toys at least every six months. The report also reveals that 'toys that are à la mode one day, are old hat the next.'

The short life span of pet toys is detrimental to their ecological footprint. Sustainability in the design, production and recycling of pet toys offers exciting opportunities for the industry.

## Materials – the sustainable choice

Of course, material choice significantly influences a product's environmental footprint. Increasingly, we see pet toy brands using natural fibres, like hemp or wool. Once discarded, these products decompose naturally.

Yet, plastic remains a popular choice: it is lightweight, waterproof, easily moulded and easy to clean. At the same time, the trend to use recycled plastics is growing.

## More recycled content

Belgium-based Moderna – manufacturer of plastic products for pets – has as its goal to have 35% of its yearly plastics volume consist of recycled materials. Their ambition is to even have some products comprise up to 95% recycled content. 'The challenge lies in reducing the pollution plastic causes,' according

to Moderna, 'for Moderna, that spells recyclable.' Similarly, US-based pet accessory producer West Paw has developed a 100% recycled content plastic fibre stuffing.

## Towards a closed-loop circular plastics economy

And West Paw is doing more. The company's strategy for its plastic toys is to create a so-called closed-loop circular economy. To this end, they developed a proprietary plastic blend that makes it easy to use production scraps and used toys over and over again in a closed loop. Pet owners send back their pets' used toys and West Paw recycles the materials into new toys.

## Showing the way for pet parents

Although a trending topic, not all pet owners are aware of the importance of sustainability in the production of pet accessories. Here lies an important role for our industry: providing pet owners with proof-of-concept will help convince them to opt for sustainable alternatives. Ultimately, this will also benefit manufacturers with reduced supply chain costs as the loop is closed and purchasing loyalty is boosted. ♦



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petsustainability.org







# German-speaking countries

The German-speaking markets represent a big part of the European pet industry. Discover how this market is doing, what the impact of COVID-19 has been and where it is going.

The state of the German pet industry	40
Crespel & Deiters Group GERMANY	45
flexi GERMANY	47
Micro Tracers Services Europe GERMANY	49



# The state of the German pet industry

How has the pandemic affected the pet market in Germany? To shed some light on the current situation, PETS International asked two major players, Fressnapf and Kölle Zoo, to explain how their businesses are developing.

## Impact of COVID-19

With people spending more time with their pets, the pandemic has accelerated the willingness of consumers to buy more expensive, high-quality products. That increase in demand for premium products can be seen in the buying behaviour for food, snacks and rewards, as well as for non-food items.

This does not just apply to the major categories of cats and dogs. Kölle is also seeing a large increase in the spend per customer for its speciality categories (aquatics, small animals and birds).

## Online revenue

Germany has seen tremendous growth in online sales, just like most other countries. For both retailers, online sales have reached around 10% of their total turnover. Some categories are particularly popular online, such as bulkier items that are more difficult to carry – cat trees or litter – but also dry dog food and wet cat food. Online sales in those categories jumped up to 35%.

## Bricks and mortar vs online

Although online will continue to grow, physical retail will still have an important place in the German pet market. Above all, consumers want a great experience and personal advice to be able to give the best care to their pets. While some offline sales will shift into online, bricks and mortar is in the best position to offer that experience-based service.

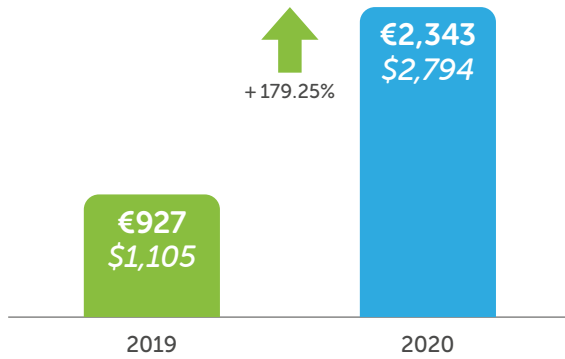
The COVID pandemic has confirmed this. Besides online stores, it is the physical stores offering a great buyer experience and valuable advice that have done well. Discount concepts did not benefit in the same way.



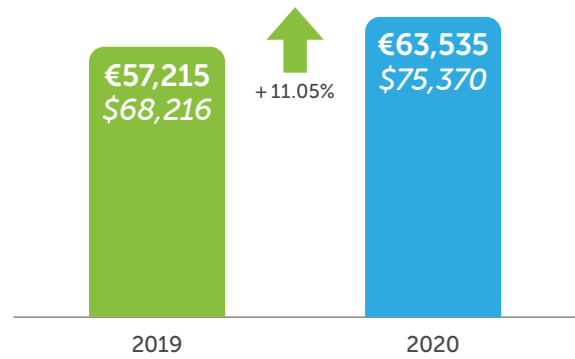
## German-speaking countries

### Key figures of Kölle Zoo

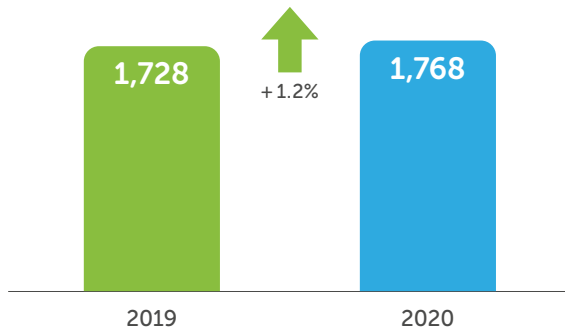
Online sales (x 1,000)



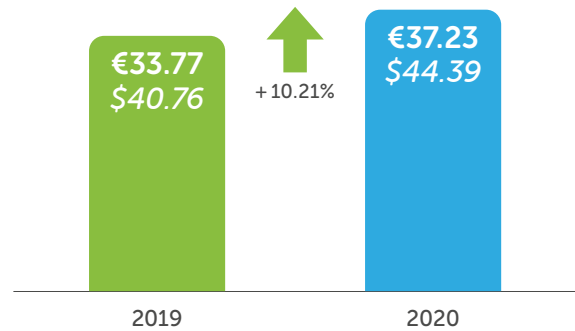
Sales Kölle Zoo (x 1,000)



Transactions Kölle Zoo (x 1,000)



Average ticket



Kölle continues to see a high demand from consumers for an entertaining store environment that is well-designed and has high-quality pet and product presentation. Even consumers who enjoy buying

online are attracted to this kind of retail environment. To further illustrate the importance of brick and mortar: Fressnapf is planning on opening 100 new stores in 2021.

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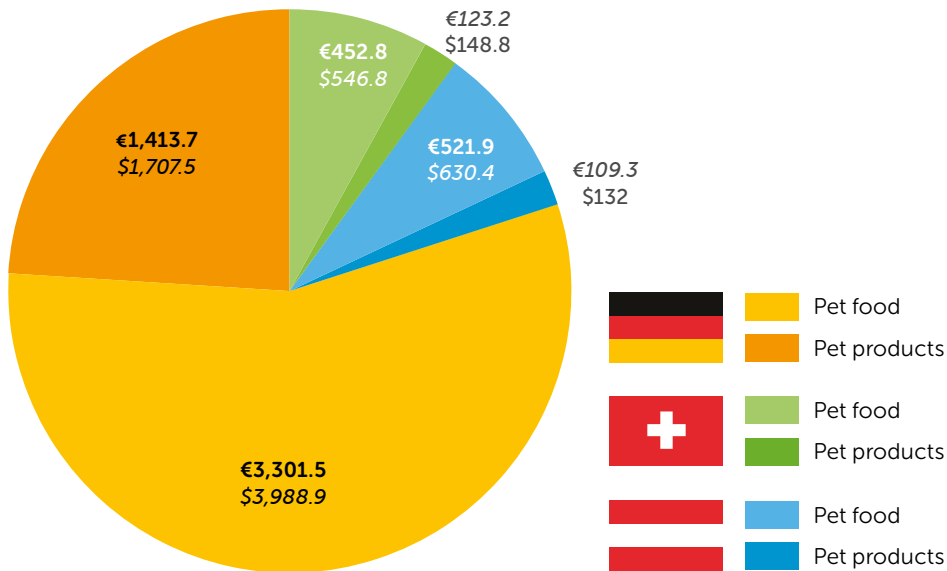
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## German-speaking countries

### Pet care market sizes in Germany, Switzerland and Austria in 2019 (mln)



Source: Euromonitor International

### Channel integration

To truly excel, retailers must find the right balance between offline and online. Both German companies are currently investing considerably in channel integration, to connect the physical world to the digital one.

Fressnapf's data already shows that consumers who buy from a combination of channels have the highest overall lifetime value. So the company is working hard on expanding its complete range of products and services both online and offline: veterinary care, digital consultations, a puppy and kitten club, grooming services, insurance and more.

### Integration challenges

One of the challenges for integration is staff-related. Sales staff at the retail outlets need to be well trained, so that they can become that advisor the consumers want and need. It is also vital that effective

communication between the company's online and offline departments helps to build a stronger holistic experience for the customer.

Smart logistics can also be key. Smart use of different delivery concepts will allow both channels to prosper. For example, big non-food items showcased in a store can be delivered using online logistics. ♦



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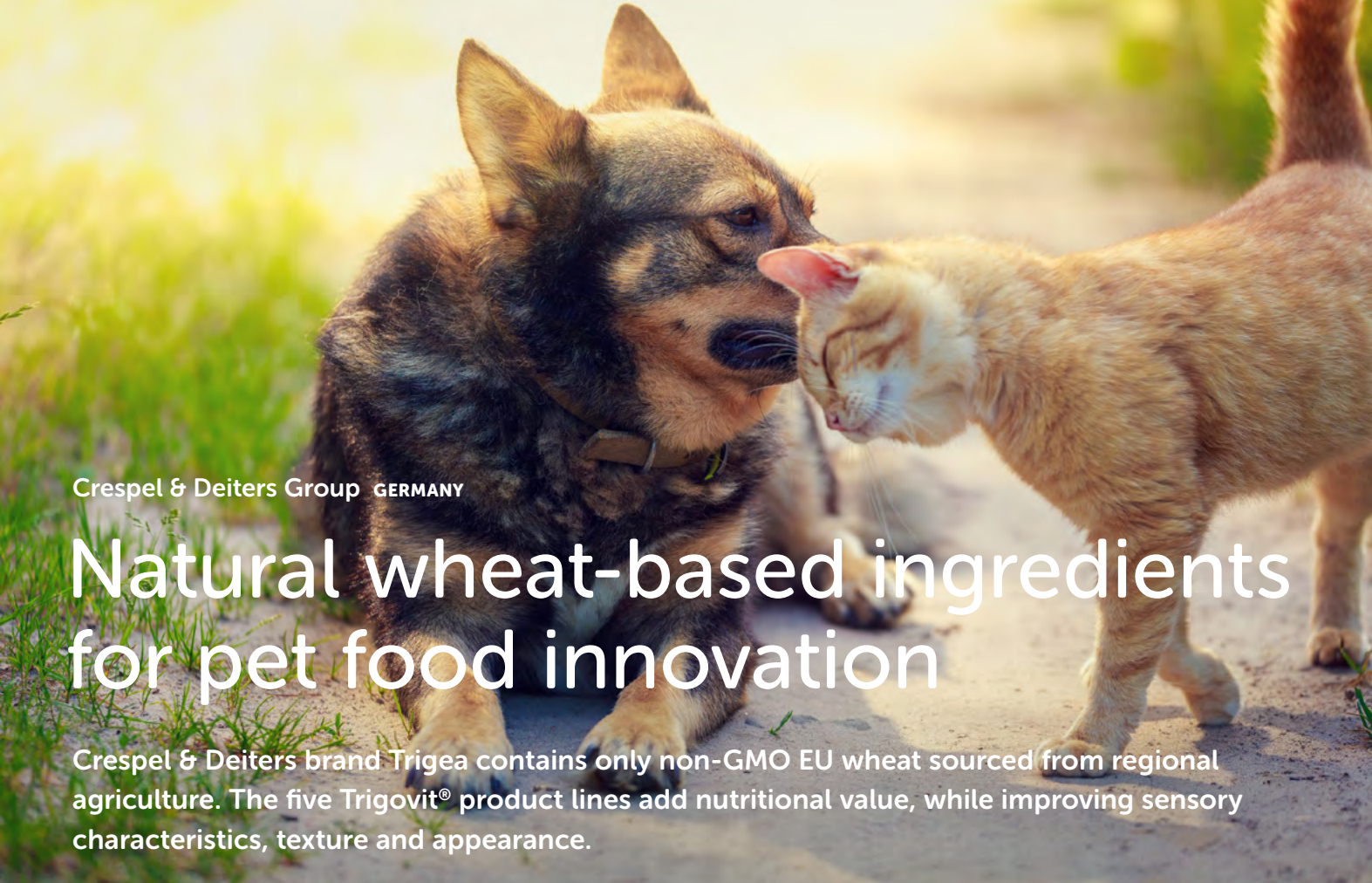


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Crespel & Deiters Group GERMANY

# Natural wheat-based ingredients for pet food innovation

Crespel & Deiters brand Trigea contains only non-GMO EU wheat sourced from regional agriculture. The five Trigovit® product lines add nutritional value, while improving sensory characteristics, texture and appearance.

## Top taste and texture

Trigovit Starch products contain modified starch and are suitable as binding and thickening agents for wet, moist and dry feed. They also improve a snack's flexibility or crispness.

Trigovit Mix pre-blends are starch-based too, so provide the same benefits. They are easy to process and have a positive effect on the product's appearance, taste and texture. As ready-to-use solutions, different viscosities can be selected during processing and in the end product.

Trigovit Flour is a line of extruded, pregelatinised wheat flours with high solubility and good binding. They are suitable for puppy and kitten milk, or as a binder in snacks and cold-pressed products.

## Protein performance

Protein is a key component of a balanced diet, but also has a technological function

in the end product, whether it is vital, hydrolysed or textured.

Particularly gentle drying allows Trigovit Protein to retain its water-binding properties, resulting in distinct agglomeration and unique structure formation. In hydrolysed form, it can be homogeneously dissolved in water and is ideal for milk substitute products for puppies and kittens. The vital plant-based proteins can also be baked or used in pastes, dry kibbles, wet feed and snacks.

Trigovit Tex products are textured wheat proteins in various shapes and colours. They are vegan-friendly – but can also be processed with meat – and improve nutritional value, texture and stability. The extrudates can be used as fibrous components in dry kibbles, and in hydrogenated form as structuring agents for chunks and meat pieces in canned food. During production, they absorb

flavours and aromas that enrich the sensory appeal.

## Individual all-round solutions

Trigea's wheat ingredients allow producers to combine functionality with profitability, while meeting customer demand for highly nutritional products from a sustainable source. The quality of all Trigovit products is extremely stable, and this ensures an end product that looks good and tastes good. The company also offers comprehensive services for R&D to provide speedy, innovative solutions that follow current consumer trends. ◆

◆ **Crespel & Deiters Group**  
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Josera provides even more variety with two new super-premium dry food varieties: FiestaPlus for adult dogs, with poultry and salmon and a tasty sauce powder. Red Vital Booster Chips provide the plus of vitamin E and C. SeniorPlus has been specially tailored to the needs of older dogs. Salmon oil provides the extra valuable omega-3 fatty acids DHA and EPA.

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



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The NuTaste® range of natural & sustainable yeast extracts offers natural taste effects and functions thanks to its multifunctional components e.g. nucleotides and amino acids. It shows a broad spectrum of applications to product developers/ration optimisers based on enhanced tastiness, attractiveness and taste improvement. In-house production methods ensure valuable, standardised food-quality products with unique taste profiles, additional colouring or nutritional effects.

**Leiber GmbH**  
 info@leibergmbh.de  
 leibergmbh.de





# From ingenious idea to innovative world market leader



**flexi has a single goal: offering high-quality, reliable dog leashes to millions of dog owners around the world.**

## How everything began...

In the early 1970s, Manfred Bogdahn was looking for a way to control the lively family dog without limiting his freedom. Manfred, a mechanical engineer and businessman, made a prototype using a chainsaw mechanism in a wooden case. An original product was born: the flexi® retractable leash. Today, the 'Made in Germany' invention is used all over the world.

The company's success comes from its focus on this special product. Over the years, flexi has remained a pioneer and world market leader. In 2010, it received Germany's 'Brands of the Century' award.

## Keeping to the essentials

Right from the start, the company's motto was: 'We make just one product, but it's fantastic'. 48 years later that still applies. Since its invention, other technical

innovations have been added to the flexi leash to create an outstanding product in every respect. This is a never-ending process to make the best even better. The design has, of course, changed over the years, but it is still recognisable as a flexi leash.

The company now has a head office near Hamburg and over 350 employees, many of whom have been working there for more than ten years. They produce tens of thousands of leashes a day.

## Handmade in Germany

The company exports over 85% of its products to some 90 countries, in Europe, the US and Asia. As the international market leader, the company is conscious of its special responsibility. From design to production, flexi leashes are exclusively manufactured in Germany.

All products are assembled by hand to ensure their quality, functionality, safety and design. Almost every part of the product is made by the company itself. Before a leash leaves the factory, it undergoes up to 100 quality tests. An in-house testing centre simulates situations that dog owners might encounter.

## New: tough tape

Flexi is about to launch its latest innovation: the XTREME, a high-tech tape leash designed for increased challenges and intensive use. The fabric is so tough that it is almost impossible to bite through, even for a dog. ♦

♦ flexi – Bogdahn International GmbH & Co. KG  
info@flexi.de  
flexi.de

# Only the best in the bowl!

**Josera**  
petfood with passion

With over 80 years of experience, we produce first-class pet food with passion and with a real benefit for our customers:

- Highest quality ingredients and best recipes
- GMO-free product range
- 100% climate neutral production facility in Bavaria, Germany
- Pets love our food, proven by the highest palatability and digestibility



Made in  Germany

Contact us: [www.josera.com](http://www.josera.com) · [export-petfood@josera.de](mailto:export-petfood@josera.de)



## SoftCat GERMANY Organic Cat Litter Innovation

SoftCat is made of natural, renewable grasses and is lightweight compared to other cat litters. This allows for economical transportation and cat litter handling. The plant fibres absorb liquids naturally and bind unpleasant smells immediately; no chemicals added. Clumps end up as compostable waste forming an organic circle: eco-friendly origin, use and compost. For an environmentally-conscious generation. Suited for adult cats and kittens. Eco-partner wanted!

Schulze Heimtierbedarf GmbH  
[info@portapet.de](mailto:info@portapet.de)  
[schulzeportapet.de](http://schulzeportapet.de)



## LEONARDO GERMANY Unique chewing experience

Anyone who has ever enjoyed pulled meat at a barbecue or a pulled beef burger at a restaurant will remember the special taste and chewing experience.

BEWITAL now offers this experience to cat customers too, with its new product range LEONARDO® Pulled Beef. A choice of 5 delicious meat flavours with a big portion of pulled beef, plus salmon oil for a silky fur.

BEWITAL petfood GmbH & Co. KG  
[info@bewital-petfood.com](mailto:info@bewital-petfood.com)  
[bewital-petfood.com](http://bewital-petfood.com)

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E-Mail [info@microtracer.de](mailto:info@microtracer.de)

Phone +49-2423-40 78 097



## Micro Tracers Services Europe GERMANY

### Testing and analysis

Pet food manufacturers need to be certain about the quality of their mixing processes. Micro Tracers Services Europe (MTSE) has developed its Microtracer Analysis Technology to provide that certainty.

### Reliable results

MTSE can check mixing accuracy and carry-over levels in all types of production lines. Satisfied customers over the past 20 years value the company's expertise that ensures reliable results. Testing pet food is particularly challenging because of the difficult matrices, like wet mixtures for canned cat or dog food or special mixtures based on raw meat.

If pet food is not completely mixed, it can contain vitamins and minerals in a lower dosage than planned, leading to deficiency diseases in pets. Carry-over from batch to batch is unacceptable, as allergens such as wheat or cow's milk are unwanted substances in allergen-free products. ♦

♦ **Micro Tracers Services Europe GmbH**  
[info@microtracer.de](mailto:info@microtracer.de)  
[microtracer.de](http://microtracer.de)



**Celtic Connection Holistic Pet Food BELGIUM**  
**Celtic's New Holistic Tins**

Celtic Connection Holistic Pet Food extended their unique, patented, Single Source Protein Philosophy to their tinned recipes – making them ideal for all pets, even those with itchy skin or sensitive tummies. They are perfect as a complete meal for fussy eaters, a treat for special occasions, or a topper on dry kibble. And with several mouth-watering recipes to choose from, there is sure to be a favourite for every fur-baby.

**Emgee Trading bvba**  
 info@emgeetrading.com  
 celticconnection.eu



**Farm Company ITALY**  
**Quality Award Winners!**

Farm Company recently won the 2021 Consumers Quality Award in Italy with its best-selling range of cleansing wipes. Premium quality, delicate yet persistent fragrances, a gentle formula on pet's hair and highly attractive packaging are the key points for earning this important consumers prize. The full range consists of 6 fragrances, all made in Italy and available in 40 pcs resealable packs. An attractive floor display stand ensures pet shops the best in-store visibility.

**Farm Company Srl**  
 info@farmcompany.it  
 farmcompany.it



**Golden Eagle FINLAND**  
**Holistic Power Formula**

Golden Eagle Holistic Power Formula is designed for very active dogs that require high amounts of protein and energy, such as sled dogs, hunting dogs, pregnant or lactating bitches. It is also an excellent choice for dogs suffering from bloat. Small feeding amounts limit the potential problem. It is a multiprotein source diet, meaning the formula contains several types of meat. 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@shetland.fi  
 goldeneaglepetfoods.com



**Lex&Max THE NETHERLANDS**  
**Baskets Nairobi**

The Lex&Max assortment is expanded with trendy baskets for dogs and cats. This time the baskets are made of high-quality printed velvet.

The Nairobi baskets can be delivered in up to 3 different sizes and can be ordered directly in the b2b webshop.

Lex & Max, always distinctive!

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



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

For the latest event information, check: [globalpets.community/events](https://globalpets.community/events)



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## Advertisers index

AFB International.....	21	Kent Corporation .....	8
Aqua One / Kong's (Aust) Pty. Ltd. ....	32	Laboratoire Francodex.....	32
Bacterfield GmbH.....	27	Micro Tracers Services Europe GmbH .....	49
Bühler Ag, Division Food Processing.....	4	P.L.A.Y. Pet Lifestyle And You Inc.....	30
Crespel & Deiters / Trigea .....	44	Premier Nutrition .....	14
De Haan Petfood B.V.....	back cover	Pro-Nutrition / Protect .....	7
Fihumin-Gesellschaft m.b.H.....	2	Terra Felis .....	inside front cover
GEPRO Geflügel-Protein		Tianjin Ranova Petfood Co., Ltd. ....	22
Vertriebsgesellschaft mbH & Co. KG .....	17	Tropical Tadeusz Ogrodnik.....	32
Interquell GmbH / Happy Cat .....	36	Tropiclean .....	12
Interzoo .....	inside back cover	Yantai China Pet Foods Co., Ltd.....	24
Josera Petfood GmbH & Co. Kg.....	48	Zolux S.A.S.....	34

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See page 5 for subjects. Contact head office (below) or local representatives (page 51).

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