



# PETS International

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Since 1988 | May 2021

## Food

Nutraceuticals, vegan pet food  
and CBD.

## Accessories

Voice products for dogs  
and trends in grooming.

## Global pet industry

Global impacts of  
the pandemic.





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## Highlights this issue



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### Food

The testing and proving of health claims about ingredients and nutraceuticals – such as CBD – requires collaboration between the pet food industry and science. Can owners safely feed their dogs with vegan products?



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### Ingredients and production

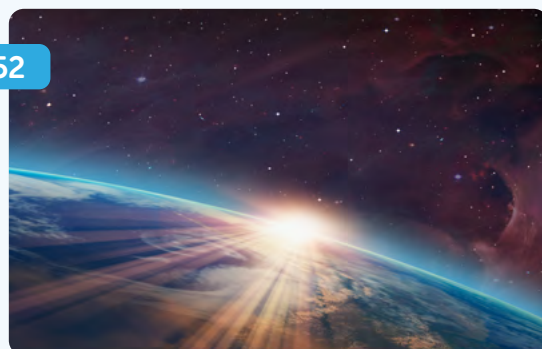
Interest in hemp ingredients in pet food and medicine is growing, but are they allowed? We discuss research and regulatory issues. What benefits do other novel ingredients like palatants and plant-based have?



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### Accessories

The pet accessories market is booming. With sales shifting to online come new packaging and design requirements. Innovative technologies enable the use of human voices in dog products. And what are the trends in grooming?



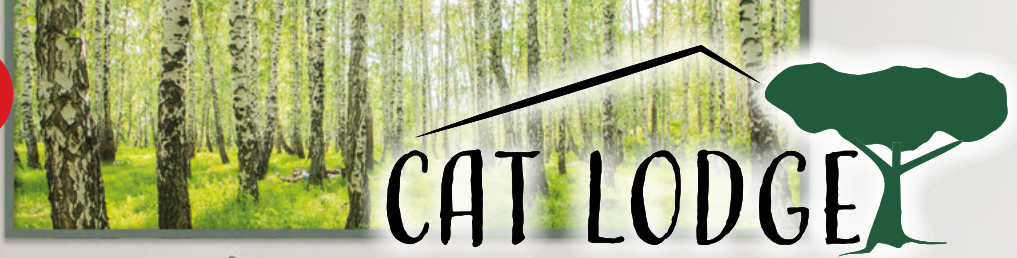
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### Global pet industry

The pandemic, now in its second year, continues to influence the pet industry worldwide. Read all about the latest developments, growth opportunities, digitalisation, the shift towards online and omnichannel... and more.

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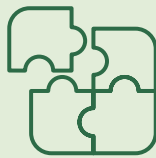
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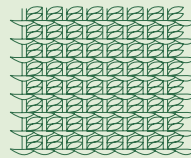
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# The key word is change

With the pandemic still among us, and vaccinations off to a slow start, the coming months remain uncertain. We hope that things will rapidly take a turn for the better. And that we can meet you again at trade shows later this year – something everyone in the industry is looking forward to. Even better, we would love to welcome you to the Global PETS Forum 2022 in Amsterdam (19-21 January).

What is less uncertain is the trend towards more healthy and sustainable food, in both the human and pet world. Which, by the way, proves that the humanisation movement is continuing regardless of the economic environment.

One human food trend is plant-based diets. But are they also suitable for dogs and cats? And are they a fad or here to stay? Another popular, yet more controversial topic is the use of hemp and CBD. Incorporating these ingredients into pet food and snacks is booming, just as it is for consumers. So in this issue we dig deeper into their application and benefits, and how they fit into the regulatory framework.

After more than 14 months of the pandemic, it is safe to say that a lot has changed. Overall, the past year has been a good one for the industry, bringing tremendous growth for many companies.

When looking to the future, the question on everyone's mind remains: which of those changes are temporary and which will influence or become the 'new normal'? During the Forum in January, we will cover that extensively with our topic 'The New Consumer – can you keep up?'



In this magazine, we take a macro look at the overall impact of the pandemic in different areas of the industry (including grooming) and different parts of the world. Online sales remains a hot topic that will certainly transform how we do business and approach 'new consumers'. Finally, technology and digitalisation play an increasingly important role in the success of pet companies, and in becoming more sustainable, but also in the interaction between pets and their owners.

*Philippe & Corine*

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

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## Accessories

Design and colour trends  
Puppies and kittens

## Asian market

# Food and Ingredients

Grain-free

Trends in the Far East

# Global pet industry

Drivers of health interest

Impact of EU/US/China legislations  
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September issue | Advertising deadline: 30 July 2021 | Publication date: 10 September 2021

Contact head office (see page 72) or local representatives (see page 71).

## 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



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

### Chewy revenue rises in 2020 to an all-time high

In times of COVID-19, the American online pet retailer grew 47% last year to \$7.15 billion (€6 billion) with a gross margin of 25.5%. Sumit Singh, Chief Executive Officer of Chewy: "We increased our customer base by 43% year over year, delivered our first full year of positive adjusted EBITDA, and generated the company's first quarter of positive net income in the fourth quarter of 2020."



### Purina PetCare is main driver for Nestlé growth

Nestlé's Purina PetCare grew by 10.2% in 2020, making it one of the top contributors to Nestlé revenue. With a steady growth rate, Purina

PetCare has jumped from fourth place in 2017 to second place in 2020 in the top revenue and profit generators. It contributed 17% and 22% respectively to total revenue and trading operating profit last year.



### zooplus grows by 14% in 2020

German retailer zooplus saw its revenue reach €1,524 million (\$1,816 million) last year, a €182 million (\$217 million) increase compared to the year before. With an EBITDA of €11.8 million (\$14.1 million) and a customer repurchasing rate of 91%, the company believes it did a great job. CEO and co-founder Dr Cornelius Patt's contract is extended for another three years.



### Timo Pärssinen becomes new CEO of Prima Pet Premium

Since Vafo Group invested in the Finnish company in February, a new CEO has been announced. Pärssinen had recently served as COO of the company. Founder and principal owner Petri Tiitola will take on the position of Chair of the Board of Directors of Prima Pet Premium, as well as project and development responsibilities at Vafo Group.





## Pet industry highlights



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Correspondence may be edited for clarity or length.

### Belgian pet retailer Tom&Co aims to become European market leader

2020 was an excellent year for Tom&Co, with revenue growth of 15%. Today, the company has a total of 130 stores in Belgium, France and Luxembourg. Its goal is to open five stores this year and eventually have 250 franchise branches, with France as the main priority.



### The Rohatyn Group completes investment in pet accessories company MyFamily

Asset management firm the Rohatyn Group has announced that it has completed an investment in MyFamily Srl, establishing a partnership with the company's founder, Alessandro Borgese, and existing investors. The investment will allow MyFamily to accelerate its product rollout and continue expanding its global distribution channels.



### Mars Petcare to launch 100% insect-based cat food

The pet care giant has announced plans for its new brand Lovebug, a fully insect-based dry cat food. Lovebug will be the first 100% insect-based cat food to be launched by a major supplier in the UK. Instead of typical meat or fish elements, one of the key ingredients in Lovebug is 'Black Soldier Fly Larvae'. According to the company, farming insects takes around 80% less land space per kilogram of protein produced – making insect protein a much more sustainable option.

### 4.3% sales increase across German pet industry last year

A study by ZZF, the German pet trade and industry association, reveals that pet sales reached €4,513 billion (\$5,377 billion) in 2020. Pet food remains the largest category, with an overall growth rate of 4.6%. Within food, there are two trends. First of all, snacks are the fastest-growing sector (by 6%). And since cats remain Germany's favourite pet (a total of 15.7 million cats versus 10.7 million dogs), the cat food market was still the largest.



## Pet industry highlights

### Kemin becomes majority shareholder in veterinary vaccine company MEVAC

Ingredient manufacturer Kemin Industries is growing its presence in the global vaccine market by becoming majority shareholder of veterinary vaccine manufacturer Middle East for Vaccines (MEVAC). First investing in MEVAC in 2010, Kemin has over the years strengthened its participation in the Egyptian-based company. In 2019, Kemin increased its share in MEVAC and received the right to distribute its vaccines globally, outside the Arabic-speaking countries in the Middle East already served by MEVAC itself.



### Sales of pet grooming products up 27.4% since start of pandemic

A NielsenIQ study shows that with more pet parents now familiar with grooming due to the lockdowns, sales of grooming products remain substantially above pre-COVID-19 levels. Sales growth rates for grooming necessities (brushes and combs, shampoo, et cetera) have far outpaced the 3.2% growth generated by the total pet care category.



### US pet market exceeds 100 billion dollars for the first time

The American Pet Products Association (APPA) annual report shows that annual sales in the US have reached an all-time high of \$103.6 billion (€87 billion). Steve King, President and CEO of APPA, says: "We are bullish for the coming year, projecting growth of 5.8% – well above the historical average of 3 to 4%." Pet food and treats sales increased by 9.7% to \$42 billion (€35 billion). Supplies, live animals and OTC medicines had a 15.1% increase, reaching \$22.1 billion (€18.5 billion).



### Investment company acquires majority stake in Bunny Tierernährung

Maxburg Beteiligungen III, a Munich-based investment company, has acquired a majority stake in Bunny Tierernährung, the premium pet food manufacturer targeting the German-speaking region. Together with Oliver Petzoldt, Bunny's managing director, Maxburg intends to continue pursuing the manufacturer's national and international expansion.



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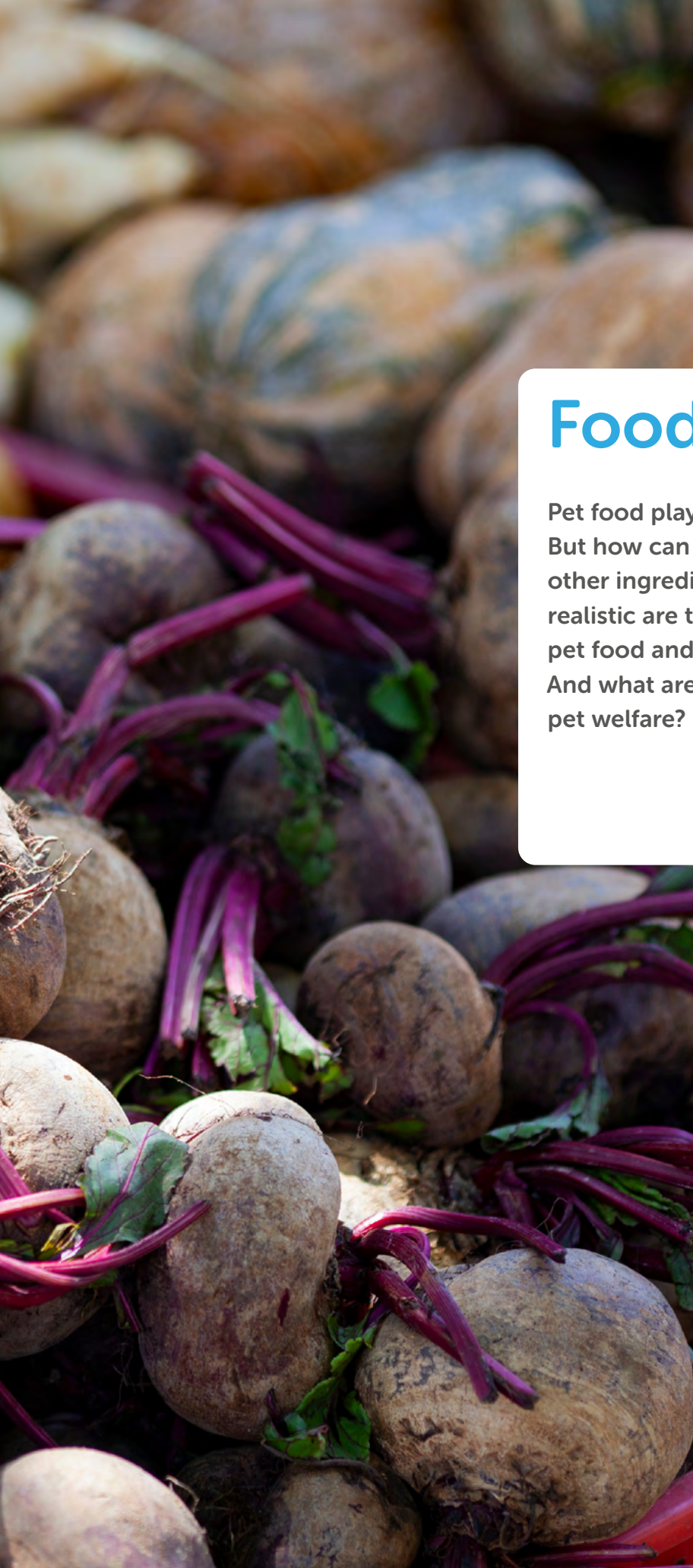


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# Food

Pet food plays a crucial role in pet health. But how can claims about nutraceuticals and other ingredients be tested and proven? How realistic are the hopes that CBD can be used in pet food and supplements to improve health? And what are the effects of vegan dog food on pet welfare?

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# Understanding the case for CBD in pet health

**CBD is one of the most exciting new nutraceutical areas currently being pioneered to improve human and pet health. But can the hopes and dreams be realised?**

## Purported benefits

While both come from the cannabis plant, tetrahydrocannabinol (THC) elicits psychoactive effects whereas cannabidiol (CBD) is a primary compound that may have health-promoting effects. The purported benefits of CBD in humans – such as modifying anxiety and depression, countering age-related cognitive decline and attenuating tumour development – hold much promise, but still need to be proven in pets.

## Effects in pets

CBD pharmacokinetics (movement within the body) has recently been studied in dogs. A look at multiple CBD-related metabolites in dogs indicates that the acidified form of CBD is more efficiently absorbed than CBD. Other research indicates that a daily dose of CBD for osteoarthritic dogs increased their comfort and activity. It has also been shown to decrease seizure frequency in epileptic seizure-prone dogs.

In contrast, a lower dose of CBD indicated no effect in a fear-based model with canines. At similar administration levels as dogs, cats display head-shaking and paw-licking indicating that they may be more sensitive to CBD.

The proliferation of hemp-based pet supplements is most likely due to consumers' associations with CBD. However, CBD comes from the flowering portion of the hemp plant, which means that typical hemp ingredients such as hemp protein and hemp seed oil contain only trivial levels of it.

## Regulatory challenges

The use of CBD itself faces many regulatory challenges. The US Food and Drug Administration (FDA) has recently published a statement of caution suggesting openness to future research but severely limiting what is currently permissible in commerce.

In the pet industry, CBD incorporation will probably develop fastest in supplement products since consumers are more likely to perceive these as unique and distinguished from pet food products. Furthermore, supplement products are clearly labelled to identify active ingredients such as CBD. Even so, consumer access to CBD-enriched supplements will be restricted mostly to retail outlets willing to navigate the regulatory environment. Meanwhile, CBD is unlikely to be widely incorporated into pet food products without regulatory changes.

### Exciting future

Current scientific literature portrays an exciting future for CBD. One scientific evaluation of a mouse model of gut colitis indicated reduced inflammation via changes in gut microbes achieved by a combination of CBD and fish oil, compared to no effect by either CBD or fish oil when given separately. Another study using a rodent experimental model of multiple sclerosis demonstrated benefits of CBD on neuromuscular disorders, likewise via effects on gut microbes.

### Opportunities for innovation

Will CBD live up to its purported benefits? Despite its illicit reputation, well-controlled scientific studies are rapidly promoting a more objective and scientific understanding of CBD. Navigating the regulatory environment will be challenging but represents exciting opportunities for innovation. Given the amount of research effort coupled with the increasing speed of innovation, we will likely see more commercial pet products containing CBD in the future. ♦



**Gregory D. Sunvold, PhD**  
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# How can we test health claims about ingredients and nutraceuticals?

The key to successful testing lies in well-defined and clinically meaningful endpoints. This offers an excellent opportunity for collaboration between the pet food industry and science.



## Shift in consciousness

In view of the growing human and pet populations and the shift in consciousness towards more healthy, responsible and sustainable diets, food manufacturers are continuously searching for new ingredients that will add value to their products. Beyond ensuring food safety, there is a rising tendency towards developing ingredients and nutraceuticals with health benefits.

To claim such effects on their labels, they must go through a demanding regulative process. Like medicines, the safety and efficacy of food ingredients must be proven in a scientific, objective way in clinical trials.

## Different types of claims

The FEDIAF Code of Good Labelling Practice for Pet Food is a useful practical guide for the industry. It categorises claims relating to health into four types of functional claims: nutrient function, enhanced function, health maintenance and decreased disease risk, and PARNUT (foodstuffs for particular nutritional uses). The essential distinction lies in the wording.

Specific, drug-like claims (for example, 'Maintains the cognitive function') must always be backed up by scientific evidence and clinically proven. This entails conducting a trial in a population of target species of companion animals. A classic intervention-based study in a drug's clinical trial is usually a randomised, double-blind, placebo-controlled, parallel-group, multicentre study.

## The challenge

Several challenges arise when designing a feeding study according to the above-mentioned principles. For example, some ingredients may change the taste, smell or texture of the food, making it difficult to conduct fair blind testing. Moreover, proper blinding becomes impossible if testing the health effects of raw food versus pellets, for example.

## The solution

The key, therefore, lies in well-defined and objective outcome measures defined by clinically meaningful endpoints. These endpoints are a direct measure of the health function and survival of the test subjects. Alternative endpoints such as clinical signs, laboratory tests and imaging are very useful as biomarkers in disease and health. Many objective biomarkers and various study designs have been proposed and established to quantify health status and solidify the food industry's health claims.

Indeed, the testing of health claims about ingredients and nutraceuticals is an excellent opportunity for collaboration between the pet food industry and science.



**Jelena Šuran, DVM, PhD**

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

# Meat versus vegan = devil versus angel?



## Is vegan dog food pet cruelty or part of saving the world?

### Growing market interest

Some pet owners firmly believe that dog food should contain lots of meat, whereas others have been feeding their dogs a healthy vegan diet for years. Vegan dog food is still broadly regarded by the industry as an insignificant niche. However, there is growing market interest in vegan diets for dogs, as illustrated by the strongly developed vegan community in the UK and the many vegan-related products and start-ups, for instance.

### Origins of prejudices against vegan pet food

First of all, although many people believe that dogs are still essentially wolves at heart, they are actually both biologically and genetically different. Nevertheless, they share some similarities in terms of diet. Both need nutrients like fatty acids, essential proteins and, of course, vitamins and minerals. Meat addresses much of this need – but it is not essential, plus it always has to be supplemented with vitamins and minerals. A plant-based formula can be developed to recreate the composition of any meat-containing complete feeds for balanced pet health, and can be optimised with supplements if necessary.

### Can dogs digest plants?

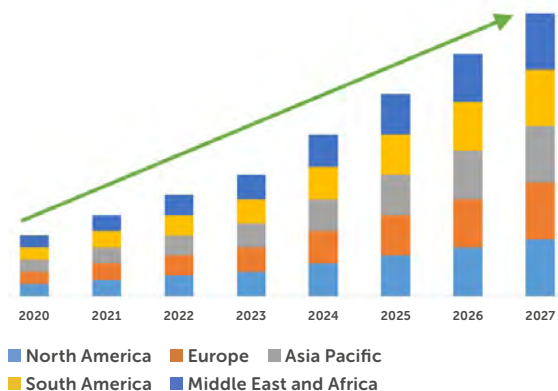
Secondly, some people think that plants are indigestible to dogs and are therefore not species-appropriate. Just as for humans, plant proteins or energy-rich carbohydrates must be selected and made technically digestible for pets. With thoughtful recipe design, plants provide most of the essential amino acids, and if any are missing they can be easily supplemented. Species justification is not based on a particular ingredient – in this case, meat – but rather on a nutrient supply that meets the needs of the species. There is no empirical evidence of malnutrition in dogs fed on premium-brand vegan food.

### Barrier to becoming mainstream

Vegan dog food has not yet become mainstream because it has not exceeded the 'meat peak'. Meat-based dog food is a good money-earner and fits into the marketing logic of existing brands. They are unlikely to change their strategy overnight, just as oil companies are unlikely to suddenly start promoting solar energy instead.



Global vegan dog food market is expected to account for \$36.49 (€30.71) billion by 2028



Source: Data Bridge

However, just as vegetarian meat substitutes are now conquering supermarket shelves, vegan nutrition is increasingly becoming a game changer along with other alternative protein sources such as insects and clean meat. Will vegan pet food save the world's climate? Certainly not on its own, but it can contribute to a sustainable transformation.

### Pet welfare

Thanks to science and technology, it is no longer a matter of whether owners can safely feed their dogs with vegan products, but rather whether they want to. Vegan and meat-based diets can coexist peacefully without any implications for pet welfare. ♦



**Klaus Wagner**  
Sustainability expert in pet food  
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# Leader in pet welfare

Prins Petfoods is a strong and well-known brand in the Netherlands. This proud family company with over 50 years of experience has a relentless focus on quality and knowledge, and a passion for pets. The company's mission is to improve the well-being of animals, and its speciality is developing tailor-made, high-quality, 100%-natural cat and dog food.

## More than good food

Besides producing high-quality and natural pet food, the company is also focused on providing advice. The Prins CareTeam is available throughout the day to answer any questions by pet owners or pet professionals.

Thanks to the various company departments, such as production, logistics and marketing, as well as facilities such as a laboratory, education/training centre, photography and film studio and visitors' centre including an auditorium, the company has everything it needs to work on its great passion: better pet welfare worldwide.





## Food

One good example of this is the Prins Experience Centre, where visitors can see how the pet food is produced and can also learn more about pets. The centre provides a great insight into the world of Prins for families and professionals alike.

### Education to increase knowledge

The company has invested heavily over the years in expanding its own labels. One of those labels is EduPet Education, which organises courses and conferences about dogs, cats, fish, barnyard pets and reptiles for owners and professionals. Another example is EduVet, which is aimed at increasing knowledge about dogs and cats among professionals by providing courses for veterinarians. The company has also introduced an education label to promote responsible pet ownership among children.

### Sustainable and pioneering

The company has experienced enormous growth in recent years thanks to constantly pushing the boundaries in order to keep pace with changing customer needs.

Despite this growth, it remains strongly focused on sustainability. It strives to contribute by consciously opting for 100% natural, reducing waste and optimising sustainable, healthy solutions with respect for the environment. Together with partners abroad, Prins is keen to further expand this position and the reach of the company's vision and products in order to promote the welfare of all pets in more and more countries worldwide. ♦

- ◆ **Prins Petfoods**  
gertjan@prinspetfoods.nl  
prinspetfoods.com

The company believes in providing added value to customers by listening to their needs. This is expressed in the brand promise: 'Prins. More than food.'

### Three pillars

At Prins, they follow their own path. They do not allow themselves to be directed by circumstances, but always work from their own strengths, responding to trends based on their own vision and expertise.

The organisation is centred around three pillars: Pet Foods, Education and Experience. Its pet foods range from pressed and crispy kibble foods and frozen fresh-meat meals to chilled-meat meals and diet foods. Education covers one of the company's most important core values: sharing knowledge for better pet welfare.

Last but not least, the company wants to offer everyone – and especially pet owners of all ages – an unforgettable experience.



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United Petfood BELGIUM

# A leading private-label pet food producer from Belgium

**United Petfood is a family-owned company that opened its first dry pet food kitchen in 1994. Today, it has a network of seventeen pet food kitchens in key locations across eight different European countries.**

## **Commitment to quality and service**

As well as expanding geographically, the group has also successfully entered into new food categories and is now able to offer wet food, baked food, treats and cold pressed, all of which complement the company's well-known dry food. United Petfood's commitment to quality and service, continuous reinvestment in the business coupled with a personal approach has allowed it to build long-term relationships and realise consistent double-digit organic growth with large and small partners across brands, specialist retail, e-commerce and mass retail.

## **Consultancy and guidance**

The company's success is directly linked to the success of its customers. With this in mind, partners can expect far more than just the usual supplier/customer relationship. The company's experienced team guides its partners, helping them to

refine their ideas and ensuring they are technically and commercially relevant. This approach results in long-term partnerships based on trust and transparency. United Petfood consciously chooses not to develop its own brands, which enables it to focus 100% on the production of private-label products.

## **Future-proof innovations**

The company challenges itself every day to meet the new demands of pet parents around the world. Moreover, its commitment to production technologies and packaging has allowed rapid adoption of recyclable packaging. Other sustainability projects include the sourcing of premium ingredients from a unique network of local companies.

## **United across the world**

Over the years, United Petfood has acquired multiple state-of-the-art pet

food kitchens which are interchangeable and support partners in exporting to more than eighty countries worldwide. This unique approach not only gives access to production and distribution in local markets, but also provides unrivalled security of supply as recipes can be produced in multiple locations. This flexibility has proved its worth for many partners when they are faced with challenges such as Brexit and export bans.

The group intends to perform more acquisitions within Europe in the coming years. The ultimate goal is to be the preferred partner for the development of private-label products in all pet food categories and geographies. ♦

♦ **United Petfood Producers NV/SA**  
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**Golden Eagle FINLAND**  
**Holistic Senior Formula**

Golden Eagle Holistic Senior Formula is designed for older adult dogs to support ageing by increased protein levels and reduced fats. Increased omega-3 levels support cardiovascular, brain and eye functions in older dogs.

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**  
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**Farm Company ITALY**  
**Made-in-Italy recycled wool toys**

Farm Company's Green range of eco-friendly products launches a new project, inspired by the company's original hometown Biella, renowned worldwide for high-quality textiles. Wool yarns and fabrics of the finest quality, leftovers from industrial textile production, are transformed into a range of seven sustainable high-quality knotted rope toys. In various sizes and shapes, to fit any breed and temper. Exclusively made in Italy. With recycled packaging to enhance the sustainability of this range.

**Farm Company Srl**  
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As an additional novelty, LEONARDO presents the 'Drink' for cats. With a delicious meat broth and tasty meat pieces, it motivates the cat to drink and supports a sufficient water intake.

**BEWITAL petfood GmbH & Co. KG**  
 info@bewital-petfood.com  
 leonardo-catfood.com



# The potato: nature's gift to the pet food industry



**Royal Avebe offers the pet food industry a wide portfolio of high-quality ingredients from potatoes, ranging from functional starches for texture to potato proteins for nutrition. This makes the company a valuable partner for natural and balanced pet food.**

## Putting customers' needs first

Today's pet owners are demanding more from pet food producers in terms of availability, quality and products that respond to trends in line with their beliefs. The Dutch cooperative Royal Avebe helps pet food producers to meet these demands, even when they face challenges such as volatile pricing, lack of availability or regulatory bans on certain ingredients.

The company's portfolio includes solutions to stabilise the final product, textures, gelatine replacements for ingredients functioning as gelatine, gums and SDAP in the dry, wet and snacks/ treats segments. In the newly built and fully equipped Avebe Innovation Center, application development can be done together with customers tailored to their specific needs and wishes.

## Going the extra mile

Even after over 100 years, the company is still bursting with ambition and is always looking for ways to create even more value from potatoes. One way the company goes the extra mile is by offering advanced analytical capabilities such as analysing glycoalkaloid contents, which helps customers save money and time, and it has a dedicated customer service team to handle information requests.

## High-quality ingredients

Royal Avebe processes non-GMO starch potatoes grown by the cooperative's members into high-quality and functional potato starch and potato protein at plants in the Netherlands, Germany and Sweden. The group does its own natural breeding and development work to ensure healthy seed potatoes and sustainable potato varieties.

## Reliable and transparent partner

The in-house supply chain guarantees stable quality and availability plus quick and on-time deliveries around the world, which is essential in today's fast-paced society. The company guarantees compliance with the highest industry standards through audits and certifications such as ISO 22000, GMP+ and FSSC 22000. It can meet pet owners' growing demands for transparency with full insight into product origins and manufacturing processes.

## Sustainable cooperation

The strategy includes a focus on reducing the environmental impact from farm to fork and developing long-term sustainable customer relationships to contribute to healthy and balanced pet food together. ♦

◆ **Royal Avebe**  
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**Schesir Natural Selection**

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**Naturo Natural Pet Foods UNITED KINGDOM**  
**100% Natural dog & cat food**

Naturo Natural Pet Food is a 100% natural pet food containing up to 60% chicken, turkey, duck, salmon and lamb. These natural ingredients are supplemented with essential vitamins, minerals, and oils, with no artificial colours, flavours or preservatives added. Each product is created alongside leading

nutritionists and undergoes stringent tasting panels to ensure that not only does Naturo taste delicious, but that it meets the nutritional needs of our dogs and cats.

Options in the Naturo range include Grain Free Wet Food, Grain Free Dry Food, Wet Food with

Brown Rice, and Grain & Gluten Free options, catering for all stages of a dog's life from Puppy, through to Adult and Senior years.

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Correspondingly, the new wet food variant with horse meat as well as the Single Protein can with water buffalo are presented. For our young four-legged friends, the Junior variant in a pouch is the ideal choice.

Furthermore, with the new variant BELCANDO Classico Complete, the dry food range is expanded by an attractive low-cost recipe.

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# Creating high-quality pet food for nearly 50 years



For nearly 50 years, Mackle Petfoods has been creating high-quality pet food including household-name brands such as Naturo, Brandy, Cat Club and Jessie. All its pet food is produced in line with the company's main principles of creating food to promote overall health and maintain a healthy digestive system for pets.

## Innovation and development

The company's strong emphasis on product innovation and development of new products has been key in keeping its brands successful throughout twenty markets internationally, from South Korea to Canada. Further global expansion is planned with leading brand, Naturo Natural Pet Food.

## All-natural

Naturo is a 100%-natural pet food containing up to 60% chicken, duck, lamb, salmon or turkey in the dog range, and 80% tuna, salmon, chicken or turkey in the cat range. These natural ingredients are supplemented with essential vitamins, minerals and oils, with no artificial colours, flavours or preservatives added. Each product is created in collaboration with leading nutritionists and undergoes stringent tasting panels.

Mackle Petfoods generated multi-million-pound sales with Naturo last year and has exciting plans for 2021 and beyond. Nielsen data (December 2020) shows that Naturo wet dog food continues to hold the number one position for natural wet dog food in British supermarkets, commanding a 5% market share and exceeding the overall category growth rate.

The company supported the brand with significant investment in 2020, allocating approximately €6.6 million (\$7.8 million) for its growth. This is in addition to previous investments that have resulted in a purpose-built plastic tray facility and fully automated pot line being added to the company's state-of-the-art facilities.

## Extensive research

In another example of its commitment to innovation, Mackle Petfoods has added

Norsh – a 100%-natural, raw, freeze-dried treat for both dogs and cats – to its family of brands. It comes in two varieties: raw salmon skin twirl, and raw chicken with fruit and vegetables. Both are sold in fully compostable packaging.

The product was created after extensive research by the in-house new product development team identified the surge in demand for a natural, raw pet treat with nutritional value. Each treat is handmade in small batches from human-grade ingredients, with the freeze-dried preservation technique ensuring that nutrients are locked in. ♦

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# A pioneer of thoroughly healthy pet food

Interquell has been making its mark on the pet food market for over 50 years. This German family-owned company, whose roots stretch back to the 18<sup>th</sup> century, has become a synonym for healthy, species-appropriate premium pet food far beyond national boundaries. Today, it exports to over 70 countries.

## Home base in Bavaria

All dry food production takes place at the home base in Bavaria, where the Happy Dog (market leader in the dry dog food segment among German retailers since 2015) and Happy Cat brands first saw the light of day. The pet food family was completed in 2019 with the arrival of the sustainable brand, Good.

## Guide for the next generation

"As a family business we have a social responsibility," explains Georg Müller. As the seventh generation, he is continuing what his forefathers started long ago. Active participation in animal, environmental and climate protection have been firmly anchored at Interquell for decades.

For example, forests have been replanted since 2011 as part of the Billion Tree

Campaign, and transport routes are kept as short as possible; 80% of ingredients originate from regional suppliers. All the meat and fish used is food-safe and comes from species-appropriate farming. The company does not carry out animal testing and uses no genetically modified ingredients or artificial additives.

## Investment in a greener future

The company has already devoted over half a million euros to its sustainability agenda, including by constructing new production facilities that save water and energy. Almost all of Interquell's electricity requirements are covered by its own PV systems. But the company never loses sight of its primary goal: to develop products that are tailored to the specific nutritional and physiological needs of pets.

## 'Made in Germany' quality

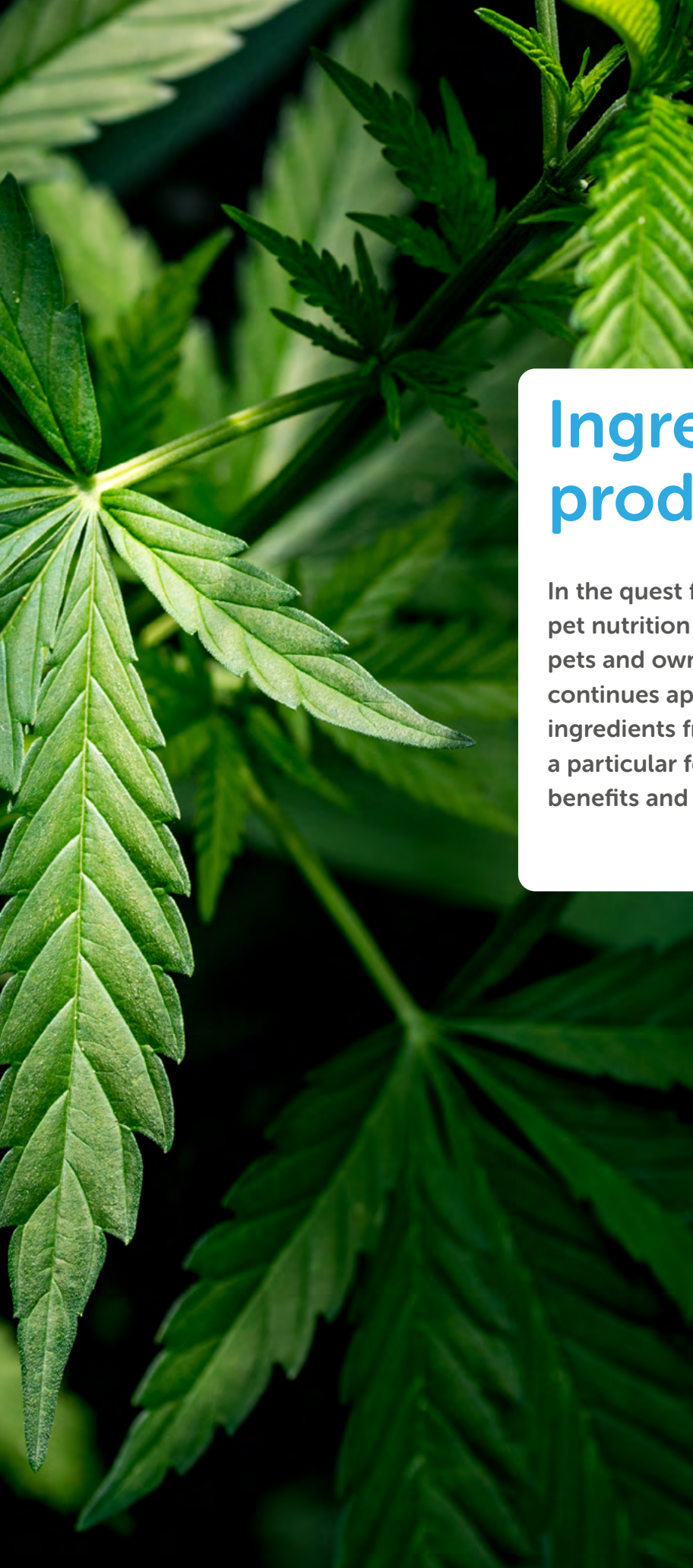
This promise incorporates the obligation to focus on the well-being of dogs and cats at all times. A species-appropriate and healthy diet which comes as close as possible to the pet's natural eating behaviour and takes account of any special needs plays an important role in this.

At the company's own food laboratory, nutritionists, vets and food scientists work to continuously improve the recipes and adapt them to these specific needs. 'Think ahead and be a role model' has been the company's motto right from day one. ♦

♦ **Interquell GmbH**  
info@interquell.de  
interquell-petfood.de/en







# Ingredients and production

In the quest for ever better and more sustainable pet nutrition to enhance the well-being of pets and owners alike, ingredient innovation continues apace. We shine a light on novel ingredients from palatants to plant-based, with a particular focus on hemp ingredients, their benefits and regulatory challenges.

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# CBD and its benefits

## What does the research say?

Alongside wide research and use of cannabidiol (CBD) extract in human medicine, CBD is finding its way into companion animal veterinary medicine.

### Few studies

As low tetrahydrocannabinol (THC) hemp products have become widely available and their use increasingly popular, interest in CBD has been growing too. However, veterinary science is still lacking substantial evidence-based research that would back up the anecdotal evidence of the benefits of CBD, with just a few research papers published that looked deeper into the efficacy of CBD in clinical conditions.

Nevertheless, the results look promising. It is important to note that cannabidiol oil derived from hemp should not contain THC, which is a psychoactive chemical.

### How it works

To date, only three papers have proven positive outcomes in canine osteoarthritis and epilepsy, and just a few publications examined the pharmacokinetics of CBD. Research led by the team of Dr Joseph Wakshlag of Cornell University College of Veterinary Medicine, using a CBD and cannabidiolic

acid mixture, has proven that cannabidiolic acid (CBDA) is both better absorbed and retained as compared to CBD, particularly when combined with a lecithin base. The most predominant cannabinoid found in hemp is CBDA that is converted to cannabidiol (CBD) during heat extraction.

CBD and CBDA extracts have a fascinating mechanism of action that takes place in the endocannabinoid system, which exists in all mammals. The endocannabinoid (EC) system is located in both excitatory and inhibitory synapses of all the classical neurotransmitter types throughout the central and peripheral nervous systems. The system is responsible for maintaining homeostasis, and still represents a widely unresearched field that is relatively newly discovered. CBD interacts with and activates the endocannabinoid system through various receptors in different organ systems.

### Promising outcomes

CBD has a proven effect on osteoarthritis,

## Ingredients and production

inflammation reduction, epileptic seizures, anxiety control, and pain management. There are multiple chronic conditions in small animal veterinary medicine where CBD could exhibit beneficial effects and improve quality of life, such as inflammatory bowel disease.

Additionally, CBD has been studied in-vitro for its anti-neoplastic properties, alone and in combination with conventional therapies, exhibiting promising results. Nevertheless, we have to be patient, as the research is still ongoing.

### Main concerns

As always, quality control seems to be the biggest pitfall in the area, with studies showing a wide variety in concentration among products on the market. Research has shown that the products analysed had highly variable concentrations of CBD or total cannabinoids.

Publications from Bonn-Miller et al. (2017) and Meng et al. (2018) examined cannabinoid concentrations in human over-the-counter products that showed a difference between labelling claims and analysis of the products. This disproportion can be explained through batch variation, improper labelling, and degradation of active ingredients, extraction techniques, and liability of laboratories conducting the quantification.

Therefore, veterinarians need to be more vigilant when it comes to CBD and THC concentrations in the products and should be asking for quality control proof that addresses potential contaminants: heavy metals and pesticides. ♦



**Dr Diana Brozic**

Assistant professor at the University of Zagreb

diana.brozic@vef.hr

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# Plant-based ingredients

## A growing trend

The trend towards plant-based ingredients in pet food has increased enormously. If they are sustainably sourced and produced, and are adding nutritional value, they will be the key for future pet food.



### Innova's research

Studies by Innova Market Insights show growing consumer demand for the integration of plant-based ingredients in human food. Interest in plant-based eating has been developing for some time, resulting in positioning it as one of Innova's Top Trends for 2021. Human food trends are driving the development of plant-based ingredients in pet food too.

### Plant-based ingredients in pet food

Pet food manufacturers and brands must act to meet consumers demand but face some challenges. Plant-based pet food cannot compromise taste and must maintain good nutritional value. Ideally, one adds ingredients with a lower carbon footprint to reduce the environmental impact of the pet food.

Finding a partner is important to optimise plant-based pet food. Duynie Ingredients has strong partnerships with many European pet food manufacturers to work together to integrate more sustainable plant-based ingredients into pet food manufacturing. In response to the growing demand for plant-based ingredients and for sustainability in the market, the company built a state-of-the-art plant in the Netherlands, where high quality and custom-made plant-based ingredients for pet food are produced.

### Locally sourced co-products

All wet incoming products are locally sourced co-products from the food industry. Co-products are

released during processing of crops into food and beverages, like chicory pulp, potato cuttings and side-stream potato starch. Vegetables, like carrot pieces, which are not used for human consumption, may also be used. These co-products are dried with residual heat and green electricity instead of fossil energy.

### Keep up the nutritional value

Pet owners are looking for plant-based pet food that will boost immunity. Ingredients with immune benefits like vitamins, minerals and a prebiotic function are favoured. Vegetable ingredients play a key role because they are a good source of fibre, minerals and vitamins. Chicory ingredients are important to add because of the prebiotic effect of inulin. Pet owners also often prefer pet food that is gluten-free. That is why adding potato ingredients is popular in pet food. Being Europe's largest producer of potato ingredients, Duynie Ingredients can offer all kinds of variations to use in recipes.

Moving towards more plant-based pet food is a challenge that pet food manufacturers need to face. Luckily there are many sustainable and healthy ingredient options to choose from. ♦



**Dirk Coremans**  
Nutritionist

d.coremans@duyniegroupp.com  
duynie-ingredients.com

# Hemp is at hand, but is it permitted?

## Can you use any hemp products or other innovative raw materials in EU pet food? Here is what you need to know.

### Some restrictions

When the EU Feed Marketing regulation was reviewed over a decade ago, the BSE and dioxin crises were still in full swing. EU policymakers faced strong calls to create a positive list of feed materials so that only those materials on an official EU list would be permitted in animal feed. In the end, they decided against such a closed list, which would have stifled innovation, but there are some restrictions on what is allowed in a pet food recipe.

### Consult the Catalogue

While all additives must undergo a lengthy, thorough safety assessment by the European Food Safety Authority (EFSA) before being authorised and listed in the EU Register of Feed Additives, raw materials ('feed materials' in EU legislative speak) may only be used if they are officially listed in the EU Catalogue of Feed Materials. If a raw material does not feature in this Catalogue, feed operators must submit it to the EU Register of Feed Materials – managed by the EU associations active in animal feed – before it can be used.

### What about hemp?

Hemp is widely used in different forms in pet food. But be aware that not all hemp products are allowed. The EU Catalogue permits hemp seed, hemp oil, hemp expeller and hemp fibre, in part subject to strict specifications, such as a maximum content of tetrahydrocannabinol (THC). The EU Register covers

some other forms of hemp permitted (hemp plant material, hemp meal, hemp seed husks, hemp shells).

The EU and the European associations regularly review both the Catalogue and the Register to ensure the correctness of both. Hemp products assessed and specifically not permitted in feed include cannabidiol, hemp distillate or solubles (considered unauthorised additives) or hemp flowers (legally not a feed material).

### Where to start

Therefore, before using any new, innovative raw material in pet food production it is necessary to check first if the material is listed in either the Catalogue or the Register. If not, it may not be used – or it must be notified to the Register, before being used. To be lawfully EU listed, raw materials must have the primary purpose of meeting the animals' nutritional needs and they may not be considered unauthorised feed additives. ♦

**For the latest versions of the Catalogue and the Register go to:**

- [tinyurl.com/e8bs3jda](https://tinyurl.com/e8bs3jda)
- [feedmaterialsregister.eu](https://feedmaterialsregister.eu)



**Thomas Meyer**

Pet food regulatory affairs consultant, MT Consulting  
tmeyer@mt-consulting.be  
mt-consulting.be

# Hemp oil

## A controversial ingredient?



**Hemp oil provides a useful concentrated form of essential nutrients for pet food – but is mired in controversy regarding its use in animal feeds in many countries.**

### A useful oil

Hemp oil is extracted from seeds and typically has a 3:1 omega 6 to 3 ratio and good levels of linolenic acid (as per AAFCO standards). The oil content is concentrated. This is useful in pet products because extra oil can compromise the final form: kibble, for example, becomes too crumbly with high oil content.

However, due to concerns about THC levels and cannabis legislation, its use is banned in many countries. For example, the FDA does not allow the use of hemp oil in pet nutritional products, due to the potential presence of THC or CBD.

### What is feed grade hemp?

Feed grade, or agricultural, hemp oil contains very low or negligible levels (maximum limit 10 mg/kg hemp seed in EU) of THC, which is the compound that causes the 'high' for cannabis users. However, analysis of THC is not exact, and some regulatory authorities require confirmed zero analysis levels, whereas, currently, only 'below detectable level' is possible.

Benefits reported for CBD use in animals include assistance to prevent pain and inflammation, epilepsy, anxiety disorders, nausea, emesis and anorexia. Levels of CBD, which is associated with the anti-inflammatory

and pain control claims, are subject to 'novel ingredient' legislation regarding efficacy and safety in Europe. Currently, no CBD-containing products are allowed in the US and other regions in Asia and Oceania.

### Use in pet food and treats

There is great interest in using hemp oil in pet products, as it is good for providing specific oils needed to ensure the health and well-being of animals. In addition, CBD oil is a focus for its benefits in terms of pain, inflammation and disease control. However, THC inclusion is not desirable, as in research this has been associated with cardiac and breathing problems in pets.

Currently, in Europe, varieties of hemp plants with seeds containing less than 0.2% THC are allowed to be used. However, in other countries and states, no hemp oil can be used. Using CBD oil for medicinal purposes typically requires full veterinary registration in Europe, but is still not allowed in some regions. This is usually related to the legal status of THC and CBD in individual countries, so care is needed before use. ♦



**Dr Lucy Waldron**  
Director, LWT Animal Nutrition  
lucy@animalnutrition.co.nz  
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# Palatability with less phosphorus is possible

**Excess inorganic phosphorus can be harmful to cats. New palatable, low phosphorus feline palatants for your pet food are available.**

## Essential phosphorus

Phosphorus is an essential nutrient for cats. It is a key component of skeletal health and is involved in several metabolic processes. This mineral is naturally occurring (organic) in many of the ingredients used in commercial pet food.

Organic phosphorus is found in protein-rich sources like meat, fish or bone meal, and in plant ingredients like wheat or bran. Inorganic phosphorus is added to the diet to balance mineral content or for other technical properties such as pH stabilisation, processing, or palatability.

## Safe upper limit?

There is currently no established safe upper limit for dietary phosphorus. However, research has demonstrated that excess inorganic phosphorus can have a harmful effect on cats with existing renal disease. Recent studies suggest there may also be a link between high dietary inorganic phosphorus and renal function in healthy cats.

In response, the European Pet Food Industry Federation (FEDIAF) has added a specific footnote regarding recommended nutrient levels for cats as it pertains to inorganic phosphorus: *High intake of*

*inorganic phosphorus compounds (such as NaH<sub>2</sub>PO<sub>4</sub>) may affect indicators of renal function in cats (Alexander et al. 2019, Dobenecker et al. 2018a, Dobenecker et al. 2018b). More research is needed to clarify potential risk.*

## New palatants

The pet food industry recognises that palatants are a main contributor of inorganic phosphorus in finished cat food. It is also acknowledged that it is quite a challenge to lower the level of phosphorus while maintaining the palatability required to ensure cats receive the vital nutrients they need. Scientists at AFB succeeded in developing new feline palatant solutions to address the challenge. These products contain lower levels of inorganic phosphorus while also maintaining or increasing palatability.

In addition to the health benefit of contributing less inorganic phosphorus, these palatants can provide other advantages to pet food manufacturers with formula flexibility that enables potential cost savings. ♦



**Sebastián Valencia**  
Product Manager  
svalencia@afbinternational.com  
afbinternational.com



# Accessories

As with other industry sectors, trends in pet accessories are being impacted by online and new, innovative technologies. Posing both challenges and opportunities, above all, such new trends offer companies new, exciting ways in which to connect with pet parents.

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# Voice products for dogs

**Our voices are as unique as our fingerprints. Scientific study has shown that dogs are actually able to understand voices and human language on a much deeper level than originally thought.**

## Recognising what is said

Dogs have a perception of individual human voices, especially recognising their owners or carers. They respond to tone, volume and expression, as well as many specific words. Interestingly, there are differences between puppies' and adult dogs' responses to people's voices.

With dogs being so responsive to human voices, it is logical that dog products that feature and leverage this, have great potential. Now fast-developing new technologies are enabling the use of human voices in products at an affordable cost.

Human voices – most often the pet owner's voice – already feature in a number of dog products. Relying on a positive association between the dog and the voice, products are used for monitoring, training, calming, communication and play. They mostly utilise recorded voices.

## Monitoring

Designed to monitor dogs while the owner is away, the Digital Dogsitter is a web app that 'listens' to the dog through a microphone. The app software tracks the sound and location of the dog and allows the owner to record their own voice. When the dog barks, the owner's voice calms it down.

## Training

Recordable sound buttons emit the owner's recorded voice when pressed by the dog. The sound and voice become a reward. Examples include Talking Dog Buttons from Talking Products.

## Calming

Apps and collar devices enable the owner to record their own voice to playback to the dog at set times to relieve separation anxiety, such as The Pet Companion, Voice Recording Collar Unit from PetTag.

### Communication

To enhance owner-dog communication, there are even translator apps available which record the dog's barks and other sounds and translate these into the 'human' equivalent, and vice versa.

### Play

There are several 'record your voice' dog toys and dog toy inserts that enable the owners to record their voice in a toy, such as those from Celebrity Pet Toys.

### Unique bond

The appeal of voice products for dogs leverages the fact that they are highly personalised. However, key to achieving success in monitoring, training and calming objectives is that there is a good bond between the dog and its owner.

### Advanced voice tech: essential for success

In developing voice products for dogs, it is essential that the voice recording used is of the best quality. This has to do with the fact that dogs' hearing and understanding of human voices is extremely sensitive. The tech used must be able to capture and play the owner's voice to perfection for it to be understood by the dog.

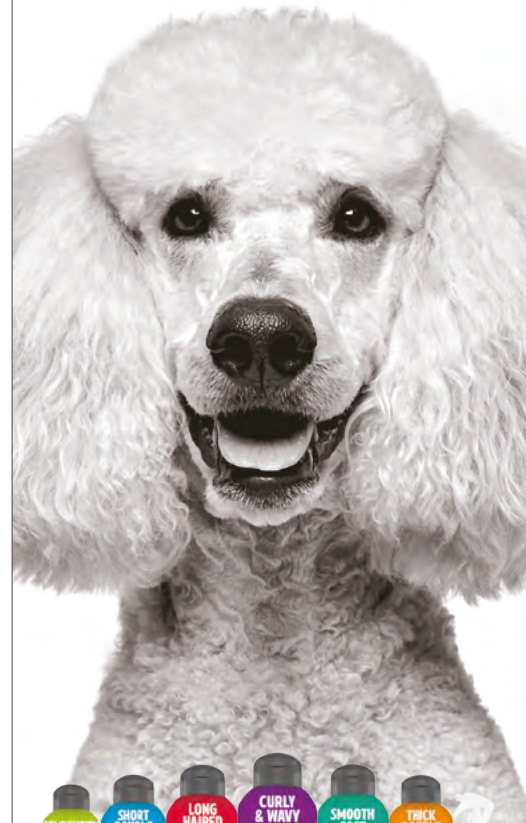
As in all pet accessories, safety is paramount. There is much research that has been done into investigating dogs' voice responses. From a functional and marketing perspective, any new product stands a better chance of success if it utilises, and can be related to, such scientific evidence. ♦



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# Trends in grooming

As in all other sectors, grooming is subject to trends. Reason for PETS International to speak with grooming expert Farah Eggers about key shifts in the market.

## What different types of grooming are currently relevant?

Farah Eggers: "Basically, there are three types of grooming. First is the grooming for competition and shows. Whatever the breed, proper grooming will make the dog look its very best.

Second, is what I call modern grooming. This type of grooming is done the most by far. Nowadays there is a clear and outspoken emphasis on 'natural'. This means grooming in line with the natural looks of the dog.

Third, are the unusual grooming styles – such as the Asian style – that gives the pet a special look. Not surprisingly, it is the most extreme and difficult type of grooming."



### What is the added value of a grooming professional?

Farah Eggers: "Grooming is a creative job. But pet's welfare is always leading. As a professional, you continually stay on top of new trends and techniques to ensure a dog gets the best treatment."

### What are the future trends in grooming?

Farah Eggers: "In the past, grooming salons were set up in or next to the house of the grooming professional. Nowadays, in big cities, this is no longer feasible. In urbanised areas, salons are moving into pet shops as a shop-in-shop concept.

In rural areas, I expect the stand-alone salons to be able to continue business, but not as usual! Pet parents are increasingly looking for personalised grooming services. And, in some areas, clients are even looking for mobile grooming services. The difficulty with such mobile services is that dogs can be more difficult to groom in their own surroundings than in a salon. Also, from a business perspective, things such as driving distances between clients, fewer clients per day and the need to carry around all the grooming tools can be challenging. For the latter, I can imagine that mobile grooming vans could offer a fitting solution, with all the grooming equipment in the van."

### What about the trend towards total pet care?

Farah Eggers: "We see that pet parents realise that the welfare and well-being of their pet are not guaranteed by a visit to the vet. They are actively busy ensuring the all-round condition of their pet is OK. This includes the right type of food and enough exercise, resulting in a happy and healthy dog.

Keeping a dog looking good with regular visits to a grooming professional is an important part of their all-round condition. It is why we see an increasing demand for grooming services. Selecting a salon is usually done based on cleanliness, professionalism and, of course, whether there is a 'click' between the dog and the groomer. For some dog owners, success at competitions or shows can also be leading in their choice of salon."



### How has COVID impacted grooming?

Farah Eggers: "For many professionals, COVID has resulted in hard times, with salons having to close in many countries. It is anybody's guess what the long-term impact will be. However, a positive effect has been the introduction of click-and-collect options." ♦

*Thanks to Farah Eggers, owner of Grooming-Point and member of the Groom Team Germany, 16+ years experience as a groomer at Hundesalon Eggers.*

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# How 1 Pug has saved over 11 million bottles and counting

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## All about a Pug

It all started with a Pug named Momo. Being pet parents for the first time, P.L.A.Y.'s co-founders were excited to 'baby' their new family member. An endless and futile search for just the right bed for their dog left them with only one choice: to make their own dog bed. Starting from scratch, they aimed to design and make the absolute best pet beds imaginable. Now, over ten years later, P.L.A.Y.'s award-winning collection can be found in over 2,500 locations in North America and the brand has a global presence in over 40 countries.

## Products

Bestsellers include the interactive Wobble Ball, modern lounge beds and whimsical plush toys that come with unique merchandising displays. Each product is thoughtfully designed and meticulously

crafted for modern pet parents, with the goal of helping stores stand out from the competition.

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By 2050, there is estimated to be more plastic than fish in our oceans. P.L.A.Y. believes everyone can make a difference and that is why its products are filled with its trademarked PlanetFill®, made from 100% post-consumer recycled plastic bottles. To date, the company has saved over 11 million non-biodegradable bottles from entering landfills. Not without reason, the company is a proud certified member of Green America® and a Certified B Corp.

## Giving back

Giving back is a core value of P.L.A.Y. It is engrained in everything the company does including its Warm Bellies Initiative

in partnership with Petfinder Foundation, where it donates a bed to a shelter pet in need for every bed sold online. Also, 2% of its animal-themed toy collections directly benefit the International Fund for Animal Welfare (IFAW) to help animal protection and wildlife preservation.

## Global reach and private label capabilities

With warehouses located in Hong Kong, the US and the Netherlands, as well as its own manufacturing facility, P.L.A.Y.'s global reach offers customers unique efficiencies and the advantage of leveraging their in-house design and manufacturing capabilities for private label projects. ♦

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# Keeping pets healthy, calm and free from fleas and ticks

Every pet should live a comfortable life: without pain or stress and without being bugged by fleas, ticks and flies. Solano's products range from collars to 'spot on' and 'spray it', helping owners to give their pets the comfort they deserve.

## Worldwide ambitions

Founded in 2012, Solano is a family-owned production and R&D company with its headquarters in the north of Israel. Thanks to the patented technology that it has developed in-house, the company is the leading Israeli pet care product manufacturer today and is well on its way to becoming the worldwide leader in parasite control solutions for pets.

## Calming collars and parasite control solutions

Solano offers a complete range of natural calming collars and spot on, natural skin and fur care for dogs and cats, CBD collars and a full range of chemical and

natural flea and tick control solutions. All products have a unique chemical composition to ensure the best efficacy and safety combined with a stylish and comfortable design. For example, the exclusively designed collars keep pets looking elegant while guaranteeing protection for up to six months.

## Private label options

In addition to supplying an extensive line of products under its own brand, Solano also offers private label options for partners around the world.

The company's objective is to give customers a competitive edge with a full

range of products that help them to stand out from the rest.

Founded on the values of innovation, efficiency and the best product quality, the company has set itself the goal of making products that are accessible worldwide, while listening to its customers, employees and partners to identify the product needs.

The Solano team is present at international events such as Interzoo and Global Pet Expo. ♦

♦ **Solano Smart Products**  
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## The increasingly important role of packaging and design in the pet accessories market

The pet accessories market is booming. Up till now though, marketing activities have been mainly B2B. Not for long anymore! Now that a significant share of sales is shifting to online, B2C is showing the way. With this shift come new packaging and design requirements.

### Flagship stores

Especially in the field of luxury accessories, there is an upcoming trend amongst manufacturers to address consumers directly. A good example is HUNTER which has opened 30 brand stores across the world and has a strong B2C reputation. The combination of brand and brand store presence contributes to raising the level of HUNTER's brand identity.

### B2C and online

COVID has been the cause of a massive shift towards online channels. In an online world, where competition is fierce, the marketing game is being played according to a completely redefined set of rules. In fact, the shift is forcing producers – especially accessory manufacturers – to re-shape their marketing strategy towards a stronger B2C approach.

Important in this game is a product's design. When buying through online channels, consumers surf the

web looking for the product that appeals to them the most. Leading in their choice are often the colour or shape of an accessory. In this way, the design and look of a product have become an important carrier for building the image of the brand.



*Ferplast With-Me bag*

For accessories manufacturers, the challenge is now to not only fully focus on the needs of the consumer, but to also get insights into the buying process and shopping behaviours. To be truly worthwhile in increasing product market share, such knowledge has to be included in the design stage of the product.

### Design versus packaging

Although a strong design is essential, for the online consumer the very first, physical acquaintance with the product is the product's packaging. In fact, because the packaging is the first impression the online consumer gets of the product, it is also the first touchpoint with the brand. And, as we all know, you never get a second chance for a first impression!

This is a key difference with products displayed on store shelves. Most in-store products are displayed without their packaging. But in online sales, the product cannot be shipped without packing. Packaging design, quality and sustainability for online sales are fast becoming essential in the consumer experience and, by extension, the perception of a company's brand.

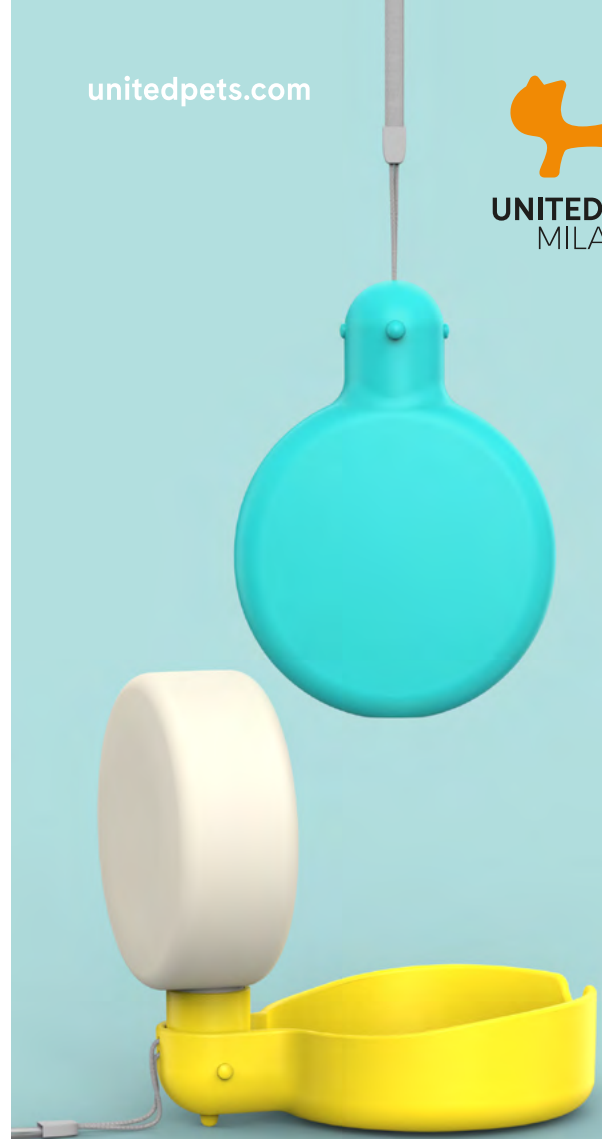
### Translating insights

In order to gain a firm foothold in online sales, as well as maintaining a strong offline presence, it is important that accessories manufacturers focus on how their products are sold to the end-consumer. What is their online position? What is their position in brick and mortar? What is the functionality of design, packaging, look and feel and quality? It all starts with insights into consumer attitudes and experiences, shopping behaviour and product selection, and translating these into the production and design process. ♦



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# Global pet industry

With the pandemic in its second year, there are many global impacts to report on. Retail channel shifts, increasing pet populations and strengthened pet-owner relationships. Changes that are undoubtedly here to stay. Other topics are digitalisation and doing business online – particularly relevant as Interzoo approaches.

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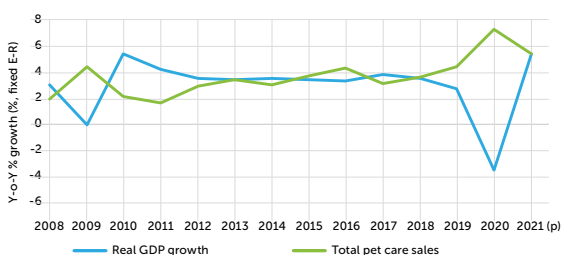
# Prescription for pandemic-resistant growth

**Global pet care thrives despite a difficult macro-environment.**

## Unprecedented

Calling 2020 an 'unprecedented' year may well be an understatement. As the COVID-19 pandemic closed borders and nearly shut down entire sectors of the global economy, millions lost their jobs. Global GDP growth plummeted more dramatically than during the 2008-2009 financial crisis. So the pet care industry faced significant uncertainty as the year unfolded.

## World: pet care sales vs real GDP growth



But pet care not only thrived during the pandemic, it also posted its strongest growth on record – by a wide margin. What drove this rapid growth despite the deteriorating global economy?

## More pets... in the right places

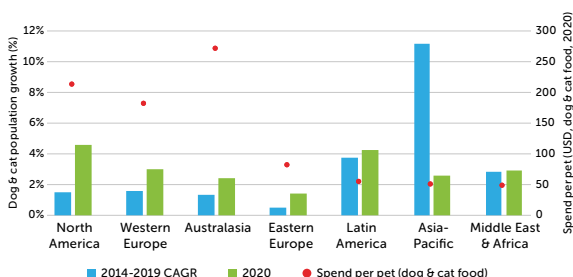
Social isolation is a hallmark of the pandemic. Under strict quarantine or stay-at-home orders, people turned to pets for companionship. So many markets reported a surge in first-time pet owners. This was not a universal trend, however. In some emerging markets, pet ownership struggled with misinformation linking pets to the virus, economic constraints or policy responses to COVID.

In Europe, North America and Australasia, pet population growth accelerated from its pre-pandemic baseline by a factor of two or three. Besides more demand for companionship, a shift to remote work made pet ownership possible for households who could not previously care for a pet. Meanwhile, pet population growth slowed dramatically in Asia and saw little improvement in Latin America or in the Middle East and Africa.

While global growth remained in line with historic trends, the increase in developed markets that spend on average four to five times as much per pet helped to accelerate industry growth.



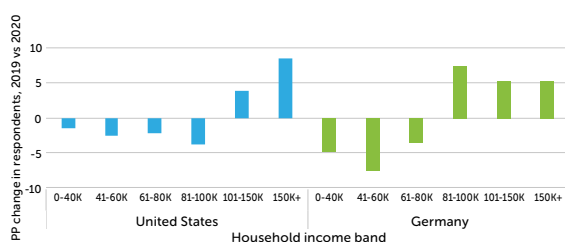
## Dog & cat population growth vs per pet spending



## Shift to higher-income households

The pandemic's economic fallout was also highly uneven. Workers in service industries like entertainment, hospitality or travel found themselves out of work and struggling to make ends meet. White-collar workers, on the other hand, were largely able to transition to remote work and keep their jobs. In the context of pet ownership, much of the surge was therefore within these higher-income households that could spend more on premium food and non-food supplies.

## 'Are there pets living in your home/yard?' Change in respondents by income band, 2019 vs 2020



Source: Euromonitor Voice of the Consumer: Lifestyles Survey; fielded in January/February of 2020 and 2021 (used for 2019 and 2020, respectively)

This explains many unique features of the industry's growth in 2020. Premium pet food once again saw significant share gains over economy or mid-priced brands, while private label lost share.

Non-food supplies – typically less of a necessity – saw sales growth surge even higher than pet food. These trends may seem a bit counter-intuitive during a severe recession, but this dramatic shift towards higher-income households can help explain the rapid growth.

## Deeper bonds

Global respondents to Euromonitor International's Lifestyles Survey describing their pets as 'beloved members of the family' jumped more than 1.5pp from 2019 to reach 70.9% in 2020 – an all-time high. This status helps drive industry growth, as pet owners are then more likely to buy premium food and humanising supplies. And more time at home also means more 'treating occasions', as value sales of treats surged by 11% to emerge as the fastest-growing segment within pet food. With mobility patterns shifting away from workplaces, shopping malls and restaurants to parks, pets enjoy significantly more time with their owners who, in turn, form deeper bonds with their companions.

## Bright outlook

While growth in 2021 is expected to slow from its historic high, Euromonitor International projects that pet care will significantly outperform its pre-pandemic baseline. Most people who brought pets into their homes in 2020 will keep these new family members, creating an elevated pet population for the future. As employers increasingly implement long-term remote work arrangements, more high-income households will enter the market. And as humanisation trends drive interest in premium food and supplies, the global market is ripe for continued growth. ♦



**Jared Koerten**  
 Industry Manager – Food & Nutrition,  
 Euromonitor International  
 jared.koerten@euromonitor.com  
 euromonitor.com

# COVID-19: opportunities for private label pet food

Although the pandemic has led to growth in the pet industry, it has also increased the financial vulnerability of many individuals. What are the implications and challenges?

## Need to economise

Pet food brands will come under pressure in some parts of the world because household incomes are squeezed in an economic downturn. In the UK, price is currently prioritised by 57% of dog/cat food buyers in their product choice and 46% is considering swapping to a cheaper brand.

This opens up opportunities for private label pet food, as it is usually at a lower price point than branded equivalents. The current recession differs markedly from the 2008-2009 financial crisis, however, as the private label offering in pet food has become much more sophisticated since then.

## Added value for later

For branded pet products and exclusive retail brands, the question is: how to add extra value? Focusing on preventive health benefits, for instance, could help

justify a higher price if this small investment potentially helps pet owners avoid healthcare expenses in the future.

## Home-centric

Pets as cherished members of the family was already a strong trend prior to the coronavirus outbreak. The subsequent lockdown and social distancing measures further solidified the pet and owner relationship, increasing the amount of time owners spend with their pets.

## Fresh and calm in stressful times

The importance of both emotional and physical health is at the forefront of many consumers' minds. With more time on their hands, limited access to a professional groomer and still stuck at home, owners are pampering their pets, and keeping them and their home smelling fresh will be a high priority too.



### Something extra

The tighter pet-owner relationship could drive increased sales of premium branded pet products in the coming months, or at least insulate the market to a degree from the impact of a recession.

A pet owner's interest in going the extra mile for the health and happiness of their pet suggests an opportunity for premium products, or those that can provide something above and beyond the basic needs. Supplements that offer superior health benefits, such as personalised supplements or functional treats, should thrive. ♦



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alintott@mintel.com  
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# Global developments and trends in the pet industry

Despite significant and enduring market shifts due to the COVID-19 pandemic, the global pet industry is expected to adapt and grow at a CAGR of 6% in the coming decade.

## Nutrition

The largest shifts, in value terms, have been in pet nutrition. This market was valued at \$94.2 billion (€80.4 billion) in 2020.

Pet owners have gravitated towards healthy pet foods over the past decade, and this trend accelerated substantially in 2020 as the availability of pet healthcare became a challenge in certain regions. A key development was an increase in consumer preference for unique proteins, although traditional proteins still dominate.

## Rise of brands

There has also been increased demand for trusted pet brands. The reliance on familiar brands was fuelled by growth in e-commerce. In 2020, this channel accounted for 17% of revenue in the pet care market.

## Supplements

Dietary supplements for pets were in greater demand in 2020. Despite the negative effects of the pandemic on supply chains, this market witnessed steady growth. Even in the UK, which has been severely affected by lockdowns and social restrictions, the market is estimated to grow by 3.8% in 2021. Growth in the global pet dietary supplements market between 2020 and 2030 is likely to be at a CAGR of 7.1%.

## Grooming

The other rapidly evolving market is pet grooming. Sales of grooming products did decline by 2.9% in 2020, due to the closure of grooming salons during lockdowns, but these closures forced owners to take a greater personal interest in their pet's grooming. As lockdowns ease over time, grooming salons are expected to make a comeback. So pet grooming

# Discover new pet products

products will be in demand in the coming years, among both pet owners and salons. In terms of products, shampoos and conditioners account for 6 in 10 pet grooming sales, with mid-range grooming products the best-selling category.

## Different regions

North America accounts for a lion's share of the pet industry with 67% of US households owning a pet. The US pet care market alone was estimated to be worth \$99 billion (€84.5 billion) in 2020.

Asian and European markets have also witnessed a steady increase in pet adoption, and the pet care markets in these regions are estimated to grow at a CAGR of approximately 6% over the coming decade. This is in tune with the average estimated CAGR of 6% for the global pet industry, which is estimated to reach a value of \$343 billion (€292.7 billion) by 2030.

## Adapting for the future

Most trends in the past year were in line with those previously witnessed by the industry. However, the pandemic and resultant lockdowns appear to have helped them gain momentum.

Achieving the estimated growth potential will ultimately depend on whether the industry can adapt to shifting trends, as it is unlikely that demand patterns will change. ♦



**Nandini Roy Choudhury**  
Senior Research Consultant  
nandini@futuremarketinsights.com  
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The **'Innovation Showcase'** is the go-to collection of innovations and new products in the pet industry:

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# Digitalisation, key to enabling sustainability?

When unravelling the complexity of sustainability, it becomes increasingly clear that you need a lot of information to take more sustainable and resilient decisions. Digitalisation enables using this information to become a more sustainable business.

## All aspects of business continuity

Digitalisation makes it possible to manage an abundance of complex and related data: collecting, aligning, connecting and processing information. Digitalisation is here to stay and affects all parts of a sustainable business.

In the near future, strategic business decisions will be based on a vast amount of digitally processed information. This includes data on operations, but also on the value chain, environmental impact and consumer patterns. It impacts all aspects of business.

- *Operations.* Digitalisation supports optimised resource use – raw materials, water, energy – and helps to increase productivity. Sharing information throughout the value chain helps to improve planning and quality while preventing loss. Digitalisation can fundamentally change and improve product design, including the design of processing facilities, supply transportation processes and operations.
- *Compliance.* Digitalisation enables continuous performance monitoring and data management. This helps to meet increasingly stringent sustainability reporting requirements.
- *Brand and image.* With the use of applications, consumer behaviour and consumer preferences can

improve product development. Online branding has taken a huge leap forward.

- *Finance.* Increasingly, investors and banks require information about the positive impact of their investments. Digitalisation can help organisations to deliver this and gain access to finance.
- *Society.* More and more, consumers want to know about the source of ingredients and a company's environmental and societal impact. Digitalisation helps organisations to better understand and demonstrate their impact. It is essential for a license to operate.

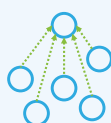
## Integrated approach

The true value of digitalisation can be unlocked if companies apply an integrated approach and start at the core. Purchasing stand-alone applications, and creating an isolated digital team, can be considered marginal progress. In sectors such as the built environment and agro-food, front runners started by reflecting their mission and vision: how their organisation creates value for society and the environment. Then they investigated how digitalisation would enable their transition to a sustainable company. This goes beyond purchasing certain applications. It entails finding the right skill sets and integrating digital experience in all layers of the organisation.



## Integrated strategies

Digitalisation enables organisations to integrate sustainability into day-to-day decisions.



## Alignment

Digitalisation brings the sector in alignment on digital frameworks and language.



## Transparency

Digitalisation enables integrated and transparent reporting on the environmental and social impacts of a company's operations.



## A digital and sustainable pet industry – A glimpse



## Connection

Digitalisation enables a connection between pets, owners and producers.



## Resource optimisation

Enabling linking and sharing information through the value chain, digitalisation massively improves resource optimisation.



## Traceability

Digitalisation enables traceability throughout the entire value chain (from farm to fork).

## Sector collaboration

Digitalisation is not limited to the company level. Sustainable resource management involves the entire value chain, including consumers. Sustainable asset management and circularity call for the involvement of all stakeholders in the life cycle of an asset or product. Regulations are required, for example, in quality and food safety management. Capacity building is necessary at sector level to create the digital workers of the future. Policies are needed to protect information and privacy. And a common language is vital for mutual understanding. All these prerequisites for the digital transformation call for action at sector level.

If anything, this digital transformation is not of a technical nature. It requires a behavioural change, both

at company and sector level. And that is what makes it scary. Nevertheless, by 'stopping the bus', reflecting on what is needed and taking an integrated approach, digitalisation holds the key to a more sustainable and resilient pet sector. ♦



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



**David Thelen**  
Sector Manager built environment at MVO Nederland  
d.thelen@mvonederland.nl  
mvonederland.nl



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# Interzoo.digital What can you expect?

**A regular 'offline' Interzoo cannot go ahead this year because of COVID-19. So the trade fair's organiser WZF has set up a digital platform instead. PETS International interviewed Rowena Arzt, Director of Exhibitions at WZF/ZZF.**

## How can participants network digitally?

Interzoo.digital offers many networking opportunities. Once they have registered, visitors and exhibitors can easily log in with their e-mail address and password. Every attendee can indicate areas of interest in their profile. Based on this, the system automatically suggests appropriate contacts. The user can also set availability – plus their time zone – to manage their schedule.

The contact search area offers opportunities like looking for specific people and planning meetings or chats. Contacts can be bookmarked and downloaded as vCard files. Each participant can also select favourites from lists of exhibitors, products, speakers and events.

## Are there different ways to exhibit?

On the Show Floor, users browse the exhibitor section by company name, product group or trademark, or via the A-Z directory. And, in the same way as at a traditional trade fair, visitors can also simply allow themselves to be surprised: by surfing through exhibitors' tiles on the Show Floor or coming across new products in the Products & Companies video channel, where exhibitors will present themselves in short videos.

Companies exhibiting at the virtual event can present their exhibition team in the exhibitor profile. Visitors can then contact team members using chat options to request a meeting.

A company can also showcase its products and services using images, videos, and links to websites and documents. Selected product highlights are displayed in an individual product section containing more detailed information. Companies are even able to set up a topic and trend-oriented virtual café and, if required, exclusive VIP rooms for selected business partners. Exhibitors see in real time who is interested in their products and are able to download a visitors list or business cards.

## The stages and cafés, how do they work?

The Interzoo.digital programme offers different stages for recorded and live presentations. There are video channels dedicated to specific topics: Best Practices, for example, or Market, Trends & Research. Here, exhibitors can book a slot to present a film on innovations or a particular theme. The accompanying programme also includes virtual thematic and exhibitor cafés. These are forums where participants can discuss issues like aquaristics/terrarristics, sustainability, grooming and much more.



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# THE NEW SKIN-SOOTHING PEST REPELLENT!



The new range of skin-soothing & repellent products of the Laboratoire FRANCODEX has repellent properties against external parasites of dogs and cats (fleas, mosquitoes, ticks and sandflies) and protective properties for their skin. The products contain plant extracts with repellent properties (margosa and lavandin) and skin-soothing (calendula oil and sweet almond oil).

*Biocidal product family PT19: Use biocidal products with precaution. Read the label and product information before use.*



# Five valuable components in product development



The development process of a new pet food product is just like in other industries. At the same time, it has some very specific features. Let us consider them in detail.

## Today's buyer's needs

Nowadays, the product development team must understand what a buyer wants if it is to meet demand. But the pet food industry works simultaneously for two target audiences: the pet parent and their pet. A product's composition, appearance and cost, trust in the manufacturer, plus the health, beauty and longevity of the pet are important to the buyer.

Most people do not read and analyse the composition of their own food as meticulously as that of their pet's. But if the pet does not like it, nothing else matters. So palatability plays a crucial role. R&D teams are constantly working on this, trying to invent the best formula for the product. Taste is influenced by several factors, including recipe, ingredient freshness, chemical reactions caused by synergy between ingredients, density and kibble shape.

## Market potential

The use of meat such as pork, rabbit and horse needs to be researched, as these ingredients are traditionally well received in some markets but not in others.

## Production technology choices

Again, this factor affects both target audiences. For the buyer, the type of product, conformity to competitive offers on the market, degree of processing

and preservation of useful substances are important. For pets, products with a similar formula, but manufactured using other technologies, may have different palatability.

## Environmental impact

Alternative proteins, like insect and vegetable proteins, or attempts to culture artificial 'meat' proteins, significantly reduce the negative impact on the environment, when compared to traditional meat proteins. Recycled packaging, and attempts to reduce the use of packaging in general, also have a significant impact and meet consumer needs. The pet industry makes substantial progress with these topics.

## Soul food

The R&D team at Kormotech is not just creating a good quality product. What is the most inspiring for them is giving it 'soul', making it more than just food. So that the customer gets positive feelings from being in a harmonious relationship with their pet. And they will buy your product again. ♦



**Anna Bober-Bahrii**

Head of R&D and Innovations, Kormotech LLC  
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# The online trend – here to stay?

Since the outbreak of the global COVID-19 pandemic, a lot of pet industry business has been done online. PETS International wants to know what effect this has had on the industry, so we conducted a survey among our clients.

## Big changes

Pet fairs have been replaced with online versions or webinars, pet conferences have been moved to online discussion rooms, and face-to-face meetings have been held using video services and tools. How is it going?

## Fairs

Only 30% of the respondents to the survey have attended online fairs. This is an important indication that the majority of people working in the industry do not spend much time or effort on online alternatives.

Those who did join an online event are not very positive about their experience, saying it is harder to find information about new products or the right business contacts. So it is no surprise that – as soon as COVID is under control – the majority would like to have fairs and exhibitions back on the agenda.

## Conferences

The same applies to conferences. 75% of the respondents did not join any online conferences. Those who did, think that communicating with others this way is much more complicated. As soon as COVID makes travel possible, the majority would like to attend face-to-face conferences again.

## Business meetings

Many meetings with clients have been held using online video tools. 85% of the respondents have used

alternatives like these, but the majority find it a bit harder to work this way. They particularly have difficulty with maintaining contact with clients by video, and staying concentrated during an online meeting.

63% say that, compared to actual face-to-face meetings, it is harder to do business successfully during online meetings, with 68% saying that it is more difficult to close business deals.

82% say it is harder to bond with the other person online than it would be during an actual face-to-face meeting.

Asked their preference for business meetings after the crisis is over, 66% of the respondents say they would like a combination of online and offline. 32% would prefer actual face-to-face meetings only.

## The future

The majority of the people surveyed would like to have all fairs and conferences back to how they were. Some meetings can be held online, especially when there is already a good business relationship. ♦



**Corine van Winden**  
Board member, PETS International  
corine@pets.nl  
globalpets.community



# More relevant than ever: a robust omnichannel strategy

Omnichannel retailing ensures that all channels of engagement and transaction revolve around the customer. So, no matter where your customer is, you are creating a single, cohesive sales and marketing experience.

## How it is done

Since COVID-19, retailers and manufacturers have been enjoying the benefits of omnichannel selling more than before. To do this well, it takes clean data, analysis, channel coordination and the right

organisational structure. Experts can combine and analyse the KPIs and customer experiences that ensure transparency and frictionless commerce, regardless of where your consumer shops.

| Segment                               | Value                        |
|---------------------------------------|------------------------------|
| Food and treats                       | \$40 billion (€33.1 billion) |
| Supplies & OTC (over the counter)     | \$20 billion (€16.5 billion) |
| Vet care                              | \$30 billion (€24.8 billion) |
| Other services (for example grooming) | \$10 billion (€8.3 billion)  |

Source: American Pet Products Association (APPA)

***Current total internet penetration for the pet sector is 22-25%, and it may reach 25-27% by the end of this year.***

### Market development

In 2020, the pet industry grew faster than expected. Estimates show that the TAM (total available market) in the US is nearing \$100 billion (€83 billion).

US pet ownership is expected to increase at a CAGR of 1%, while overall pet spending is likely to grow by 3-4%. Similar trends are anticipated in Europe. The market strength in 2020 and the shift to online offer a proof point for what we should expect in the future.

Current total internet penetration for the pet sector is 22-25%, and it may reach 25-27% by the end of this year. Similar growth patterns and category breakdowns are also seen in the European market, with slightly more emphasis on the cat segment in the EU versus the dog segment in the US.

### Further expansion of online

Online penetration of 30-40% is possible – pet tech products have already reached 50%. This is driven by online players such as Chewy in North America and zooplus in the EU, both of them currently experiencing healthy double-digit growth. Online subscription programmes are fast-growing, locking consumers into brands for a longer time than if they would be purchasing products in stores. While each channel has its specialities and unique uses, both are still likely to acquire and retain customers.

### Finding and keeping loyal customers

Online is particularly strong at retention, employing loyalty techniques and programmes such as subscriptions, repeat ordering and rich customer data capture to help solve or anticipate consumer problems. Digital tactics that perform well and have the highest ROI are programmatic marketing, e-mail marketing, SEO (search engine optimisation), PLAs (product listing ads), SEM (search engine marketing), affiliates, direct response TV and mail.

Brick and mortar should be a strong acquisition driver, especially for retailers with well-trained sales staff who can offer a superior experience for both pet and pet parent.

### Building a brand

Launching a new brand, building brand awareness, upselling and educating, events (for example photos with Santa) and services (for example grooming) – all will entice new consumers. Capturing a new pet parent delivers one of the highest LTV (lifetime value) cohorts possible.

The added enjoyment of shopping with your pet can offer an enhanced experience. Marketing tactics for brick and mortar can be similar to the digital tools mentioned, but they should have a strong call to action specifically targeted at driving store traffic.

Manufacturers interested in launching brands, or re-branding existing offerings, should work closely with their retail partners to develop marketing campaigns, measure NPS (net promoter scores), and offer co-op money for the retailer to train their employees, promote the product, influence shelf space locations, and leverage markdown money for promotions.

Today, there are still unique benefits in each channel. But it is the company who has an omnichannel mindset, and obsessively studies the consumer, that will always come out on top. ♦



**Jodi Watson**  
Independent Retail Consultant  
jodiwatson@gmail.com

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# 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)



## 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@chgie.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

**Rest of the world**

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

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## Colophon

### InterMedium Publishers

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

Managing Director: **Philippe Vanderhoydonck**, philippe@pets.nl

COO: **Gerard de Niet**, gerard@pets.nl

Board member: **Corine van Winden**, corine@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

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Wanpy Europe Petfoods by

Mr. Martien van Bohemen  
Tel.: +31 (0) 6 23375988  
martien@wanpy.eu

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