



# PETS International

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## Grooming and wellbeing

Trends and developments,  
with market figures.

## Internet of things

How the internet of things  
will influence the industry.

## Innovation in pet food

What are the innovation drivers?  
Plus clean labelling.



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## Grooming and wellbeing

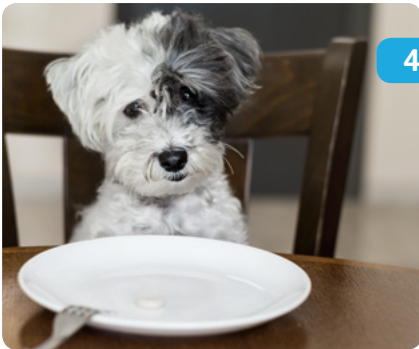
Developments in the global grooming market. With figures and trends.



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## Internet of things

How the internet of things is influencing the pet industry. What is the impact on business models?



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# Meet the millennials

Online e-commerce channels such as Amazon, Alibaba, Zooplus and all the others who are entering the pet industry are forcing pet store retailers to create and grow their competitive edge. An increasingly valued – and valuable – service to add is grooming. So in this issue, we dedicate a section to grooming, highlighting the latest market trends from all over the world, plus expert insights on the needs and behaviours of pet owners when it comes to grooming their pets.

Today we cannot imagine life without the internet and yet it started barely 30 years ago. In our 30<sup>th</sup> anniversary section, we look back on the pet industry's very first steps on the internet and ahead to how it will develop and impact the pet industry in the next 30 years, with maturing millennials in mind.

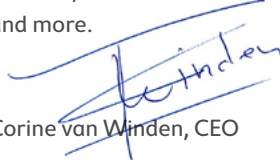
At the same time, the internet, big data and the Internet of Things are also driving innovation in the pet food industry. What is there to know about the latest in, for example, data sharing, micro tracers and blockchain and how can you prepare your company to take advantage?

And are these developments only on the processing side? No! Blockchain, it turns out, may also be critical for an effective and successful clean label policy. Clean label is a trendy concept today, especially among millennials, so, in this issue, we shine a light on it. Where does it come from, why, and how to respond?

Lastly, in our regional section this issue, we focus on Asia. It is impossible to ignore the rapidly growing Chinese pet market these days. Chinese customers tend to prefer western brands over Chinese or Asian ones, so the export opportunities are exciting for those who know how to take advantage and export their pet food and snacks there.

There is, however, also another trend underway in China: the Chinese pet industry is being discovered by private investors, who are rushing to invest in promising companies. Who are these private investors and how successful have they been?

Read on, and find out about all of this and more.



Corine van Winden, CEO



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### CIPS

27 to 30 September, Guangzhou, China

[en.cipscom.com](http://en.cipscom.com)





### Pet zoo Ankara

4 to 7 October, Ankara, Turkey

[petfuari.com/ankara](http://petfuari.com/ankara)



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Correspondence may be edited for clarity or length.

### How PetSmart is driving in-store traffic

The largest specialty pet retailer PetSmart announced that it is introducing more in-store events called PetSmart parties, along with Sample Saturdays and Camp Critters. In this way, it hopes to boost in-store traffic. PetSmart has been one of the few brick-and-mortar retailers that is still increasing its store count instead of lowering it.

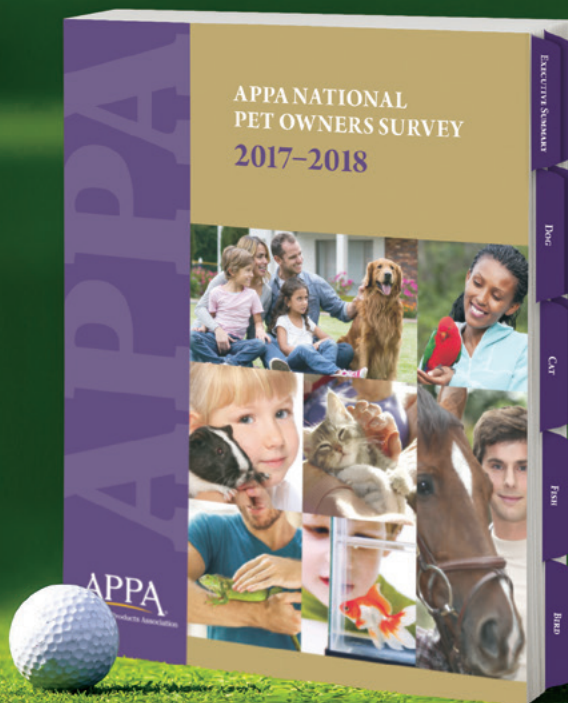
"We continue to focus on meeting the evolving needs of pets and pet parents alike," explains Brian Amkraut, Executive Vice President of Real Estate, Strategy, Store Operations and Services at PetSmart. "Continuing to expand our brick-and-mortar footprint is an important part of our strategy to be the most convenient, best-in-class pet retailer."

### Radio Systems PetSafe Europe appoints Business Development Manager



Radio Systems PetSafe Europe, parent company of PetSafe® Brand, announced the appointment of Alex Bewley to Business Development Manager. The new appointment is a further boost to the company's sales team, following Nicki Hamilton joining the business as EMEA Sales Director last month.

# The 2017-2018 APPA National Pet Owners Survey



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October issue  
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**All that is small**

Trends and developments in the small animal segment and aquaria.



**Sourcing ingredients**

Influences and challenges in sourcing of special ingredients.



**Premium and wet pet food**

What is there to know about the premium and wet pet food market?



**GlobalPETS Forum**

Nominees for the GlobalPETS Forum Award.

**Supply chain**

What is changing?



Upcoming issue | Advertising deadline: 14 September 2018 | Publication date: 12 October 2018

Contact head office (see page 96) or local representatives (see page 95).

### Petco: 'Amazon-proofing' its business with a new store



Petco recently opened a new service-focused store that aims to give shoppers an experience that cannot be purchased online. Called PetCoach, the store offers services such as grooming, training, veterinary care, dog walking, and more, to pet parents. Only one-third of the space is used for selling a limited assortment of products.

The launch of the new concept comes as Amazon is encroaching on the pet industry, and Petco is undergoing competition from PetSmart. The company said it plans to open more of these spaces in the future. Time will tell if this strategy is effective in making Petco Amazon-proof.

### Bob Martin closes its French subsidiary

Bob Martin is closing its French operation in Nemours, which it acquired from Nestlé two-and-a-half years ago. The move follows the closure of its Italian factory in Udine, which manufactured cat litter and pet medicines, at the end of last year.



### Phillips Pet Food & Supplies appoints Senior VP of Sales

Phillips Pet Food & Supplies recently named Bill Hooker, EMBA, as Senior Vice President of Sales. Hooker is responsible for Phillips's sales and customer care departments.



### United Petfood is joining forces with Bynsa and Nordic Petfood

United Petfood is a Belgian family-owned company specialised in the manufacturing of pet food for retail customers and brand owners. The last few months United Petfood expanded with the take over of two companies: Bynsa Group and Nordic Petfood.

Bynsa Group, a benchmark company in Spain in the pet food sector, recently signed an agreement by virtue of which United Petfood will acquire Bynsa Group. In effect, it is a formalisation of the existing strategic partnership between the two groups.

Nordic Petfood, the largest Romanian petfood producer is active in the production of dry pet food, biscuits and snacks wfor retailers and brand owners. The Romanian shareholders took the decision in order to accelerate the future development of the Nordic Petfood companies. The inclusion within United Petfood, enables Nordic Petfood to continue its growth in the Eastern European region within a strong group.

The group has ten production plants in Europe, located in Spain, Belgium, France (5), the Netherlands, Poland and Romania.



### Ursula Phillips joins The Real Pet Food Company

Former PepsiCo Australia and New Zealand technology boss, Ursula Phillips, has joined The Real Pet Food Company in August as its Sydney-based chief information officer.



**Nestlé hoping to acquire Champion Petfoods for €1.71 billion (\$2 billion)**

It is reported that Nestlé is hoping to take control of Canada's Champion Petfoods for over €1.71 billion (\$2 billion), as the consumer-goods giant seeks out higher-growth businesses to help offset its struggling packaged-foods operations.

Nestlé is in talks to acquire a majority stake in the maker of specialty cat and dog food, whose owners include Toronto buyout firm Bedford Capital. The talks, however, could still break down before a deal is completed.

The interest in Champion comes almost a year after Nestlé first disclosed a far-reaching plan to revive its stock price – amid pressure from US activist investor Daniel Loeb – by investing in areas such as pet care, bottled water and coffee. Since then, the company has closed several deals, including its €5.99 billion (\$7 billion) acquisition of the rights to sell Starbucks coffee and tea in grocery and retail stores.



**US wild bird products to hit record highs by 2021**

Compared to cats and dogs, birds have always trailed somewhat behind in terms of their general pet popularity status. However, a growing number of Americans feed and take care of wild birds that live around their homes.

According to a report from Packaged Facts, 'Wild Bird Products', the US market for wild bird products is projected to reach €1.88 billion (\$2.2 billion) by 2021. The market includes packaged seeds, nuts, and seed blends, suet and nectar, and non-food products such as feeders, houses, and baths.

The report states that wild birds as pastime is becoming more popular across all adult age groups, with 57.2 million people aged 16 and older participating in 2016, up 8.6% from 2011.

**Pets at Home sales rise as new boss brings down prices**

Pets at Home's group revenue was £277.4 (US \$354 / €309) million for the period between 30 March and 19 July, with retail revenue rising 6.9% to £245 million (US \$313 / €273) and vet

revenue jumping 18.4% to £32.4 (US \$41.3 / €36) million.

Pets at Home has benefited from a lift in sales after it brought down prices to compete with online rivals.



CEO Peter Pritchard has been pushing ahead with plans to offer better-value products and more services for pet owners. On a like-for-like basis, retail sales were up 6.1% while vet sales grew by 13.6%.

Pets at Home has been lowering prices to drive higher sales and has been expanding its vet services business, which Pritchard has described as one of the 'biggest opportunities' for the firm.

# Private label gains ground across Europe



In general, private label is still a growing segment. What is the situation per country and especially in the pet industry?

## Widespread gains

Retailer brands keep gaining popularity across Europe. The latest Nielsen data shows that market share for private label increased last year in twelve of the nineteen countries tracked for PLMA's 2018 International Private Label Yearbook, and now stands at 30% or above in seventeen countries.

Private label reached an all-time high in Europe's largest retail market, Germany, with its market share there climbing to over 45% for the first time. Market share also increased to its highest levels ever in six other countries: The Netherlands, Belgium, Sweden, Norway, Hungary and Turkey.

The gains came even in countries where private label already had very high penetration. Market share for retailer brands climbed in the United Kingdom, Germany, Belgium and Portugal, where share was already more than 40%.

## Marked growth in the UK

In the United Kingdom, where supermarkets are investing in their private label programmes to meet competition from the discounters, market share rose to more than 46%. Private label's share has remained above 40% there ever since Nielsen began compiling data for PLMA in 1997.

Across Europe, the biggest market share gain was posted in Turkey, where private label climbed by 3 points from a low base to nearly 26%.

## Strong in Spain and Switzerland

Elsewhere, private label held well-established ground.

In Spain and Switzerland, it still accounts for half of the products sold. In Greece, retailer brands continue to account for one of every three products sold in the country.

### Nordic gains

In Scandinavia, there were gains in Sweden, Norway and Finland, with market share in all three countries above 30%. Private label share was at 30% or above in four central and eastern European countries – Poland, Hungary, Czech Republic and Slovakia – led by Hungary climbing to 34%. Market share remains above 40% in Austria.

















### Slippage in France and Italy

Only two markets saw the market share of private label slip. In France, market share remained above 30%, but declined as some retailers reduced their

price entry brands and moved toward more premium products. In Italy, it stayed at or above 20% for the sixth consecutive year, but declined by a point in the past year. Prospects for retailer brands look to improve as Aldi, with its strong private label programme, enters the Italian market.

Tom Pennincks of Nielsen said the gains by private label last year were especially impressive because they came at a time when consumer confidence across Europe was at its highest level in seventeen years, demonstrating the growing popularity of private label in all economic conditions. ♦

### What is the situation in the pet market?

Country	Private label share			
	2016		2017	
	Volume share %	Value share %	Volume share %	Value share %
 Spain	69.5	51.1	69.2	50.5
 Switzerland	45.0	30.9	44.0	30.2
 Germany	67.1	55.5	67.1	55.5
 Austria	64.4	47.5	64.1	46.7
 Belgium	61.1	42.7	60.7	42.7
 Portugal	63.2	47.9	61.5	46.1
 Hungary	67.1	54.4	64.6	53.5
 Denmark	51.5	31.8	n/a	n/a
 Slovakia	54.7	43.4	52.9	41.2
 Finland	24.6	15.5	23.4	14.6
 Sweden	21.1	11.5	21.0	11.9
 Czech Republic	46.7	33.0	46.7	32.4
 Poland	53.8	38.3	55.9	39.6
 Norway	41.5	17.6	39.6	17.6
 The Netherlands	27.7	23.3	29.4	23.3
 Italy	32.8	20.8	32.8	20.8

Source: PLMA Yearbook 2018



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# 30 Years of the internet

In the last 30 years the internet has been the shaker and mover of the pet industry. Online sales have a huge impact on the pet industry. The maturing millennials will have a further impact on online sales. What to expect?



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# 30 Years of the internet

## The shaker and mover of our lives and the pet industry!

In this 30<sup>th</sup> anniversary year, we are taking a look at a number of important topics for our industry. How have these developed over the years and left their mark on the pet industry? How will they evolve over the coming years?

### Way back when...

Thirty years ago, when PETS International was founded, the internet was still unknown. In 1996, we published our very first article on the internet: explaining what it was and how it could be advantageous to business. Online shopping was possible, be it in a very basic form.

### The first steps

In the good old days, it was newsworthy if a company launched its homepage. Amazon.com was an early player, launching its online store in 1994. Zooplus made its first, tentative steps on the internet in 1999. From the outset, the site had a strong European focus. Although Amazon and Zooplus both grew fast it was the firm belief that, although here to stay, internet's impact would be small.



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Stephen Turner  
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### Fast forward: 30 years on

Today internet is the shaker and mover of all of our lives. With online becoming the standard for everything we do, new ways of working have also emerged. Internet is the carrier of many new services such as email, social media and hosted services. It is also the place where organisations gather data and are causing a major upheaval in the retail landscape. In fact, many companies - such as Facebook and Google - have become wholly dependent on data. But, more is set to change.

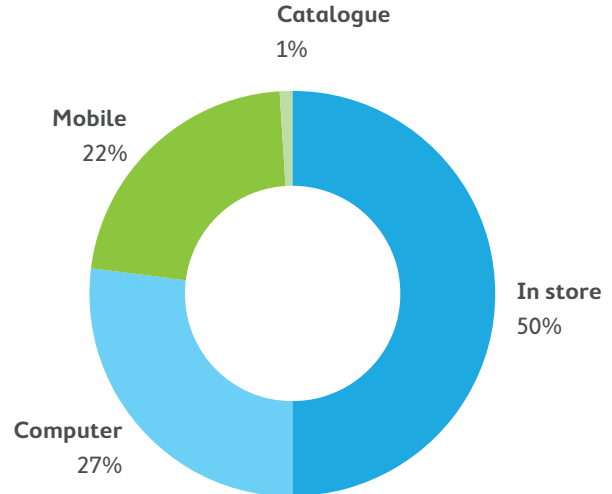
### What the future will bring

In the coming years, the internet will enable the inception of new products and services that will fundamentally change our lives. Here are a number of such disruptive changes.

#### 1. Shop retail is not dying, but a painful transition has begun!

The mature millennials have mixed shopping behaviours. Brick and mortar experiences – as well as physical, on-site interactions – are extremely important to this group. Shops will digitise their physical infrastructure and roll out new store features and formats based on customer experience and convenience, all with a strong digital flavour.

#### Where do millennials prefer to shop?



50% of millennials actually prefer going to physical stores at some point in the buying journey.

#### 2. The consumerisation of b-to-b

Many b-to-b buyers and users will experience their first frictionless, b-to-c like purchasing and ordering experience as they continue the transition of their product discovery and buying behaviours to online and mobile. Everything from print catalogues to sales calls are being replaced by a digital-first discovery process and a buyer-centric, simplified ordering process.

This ease of ordering/easy-to-do-business-with interaction will lead to increased ordering and share of the budget for the vendors who put the user at the very heart of the buying experience.

#### 3. Augmented Reality

Augmented Reality will become huge, as brands roll out features that allow consumers to use their mobile devices to visualise items in their home or office, before purchasing. What about pet products?

#### 4. The new measure of the retailer's digital success

Retailers will now know how many dollars of in-store sales are attributable to every dollar spent on digital, thanks to a reliable attribution model between digital and in-store: ROPO Ratios (Research Online, Purchase Offline).

► SEE NEXT PAGE



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2018 Manufacturing & Distribution Sales and Technology Survey Report

### 5. Mobile checkout overtakes desktop checkout

From buying products and renewing services on-the-go to actually checking out or buying in-store: mobile checkout will become a convenience that no consumer will want to do without and that no merchant can afford to ignore. With Google, Samsung and Apple deploying advancements in their payment technology, mobile checkout is likely to become the preferred method of payment for retail purchases.

### 6. Marketing 3.0

As brands and retailers get better at leveraging consumer and behavioural data, e-commerce initiatives will target much more specifically, nearing the once impossible idea of one-to-one marketing. Just like when shopkeepers knew clients' names and preferences!

### 7. Voice will change SEO forever

How do you sell online if a consumer never visits or sees your website? The coming years, consumers will speak to their devices and use voice to interact (conversational AI) like never before. Retailers, merchants, and brands will have to change the ways they communicate.

### 8. Photoshopping

An image will be worth a thousand words. Instead of typing in words, many consumers will discover image-based search. In fact, image and voice-

activated search may make up 50% of all searches by 2020. As image analysis automation becomes standard in mobile devices, consumers will be able to take a picture of an object and then search for that exact product or a similar one.

### 9. Reaching peak browser

In an internet of things (IoT) world, our dependence on browsers will begin to diminish. Mixed in with mobile apps, AR interfaces, and voice interactions, the browser will become one channel among many, and no longer the de facto means by which we purchase products or services digitally.

Though the browser will continue to be an essential interface, consumers and buyers looking for convenience will be using other means to complete transactions. This will be made possible by mobile devices, conversational AI, Augmented Reality and interconnected devices and data as the basis for all b-to-b and b-to-c actions. ♦

With thanks to: Absolutnet  
[10ecommercetrends.com](http://10ecommercetrends.com)



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# Outcome fundraising of PETS International for PSC

A big thank you for all who donated!



PETS International is celebrating its 30<sup>th</sup> anniversary. Part of the celebrations includes a present to the industry: a donation of over €15,000 (\$17,555) that we raised for the Pet Sustainability Coalition (PSC). We would like to take this opportunity to thank the companies who contributed to this cause!

## What is PSC going to do with your donation?

PSC will be using the money to support its current European activities. These include:

- Serving as a non-profit stakeholder and help establish industry wide guidelines for proper Life Cycle Analysis in collaboration with the European Commission.
- Exploration of the European Sustainability Programme and larger presence at ZooMark 2019.
- Communicating best practices to members: such as Josera's Carbon Footprint (find this case study at [petsustainability.org](http://petsustainability.org)).
- Webinar on sustainable packaging for European members.

- Sustainable Business Pet Industry Report drawn up in partnership with the World Pet Association (WPA). The aim of this collaboration is to focus pet retailers on sustainable business practices and help them better identify manufacturers and brands that meet new consumer demands for responsibly made products. It will help retailers prepare for millennials as consumers and employees and help make their companies attractive to these critical audiences.

At this moment, the European PSC committee is being formed. The planning is that this committee will kick off its activities in September. The committee will decide, amongst others, how the €15.000 (\$17,555) fund will be invested in European activities. Read more about this initiative in the next issue of PETS International. ♦





TATRAPET SLOVAKIA

# A company that makes your pet's dreams come true

Many decades ago, there was a little boy who on seeing a brightly coloured fish in the aquarium of the zoo in Slovakia started dreaming a big dream.

## What dreams are made of

In 1988 the boy had become a young man who started his own business in aquarium products. This was soon followed by the opening of a first shop.

## Expansion

As the Slovakian pet market matured, so the company grew, becoming market leader in the distribution of a wide range

of not only aquarium, but also of pet products. An own product line was soon launched, followed by international expansion into the Czech Republic and Poland. In 2008, TATRAPET exhibited at Interzoo for the first time.

The company is currently represented in 16 countries and is to be found at leading fairs in Russia, China, India, and Brazil.

## Innovation, quality and customer focus

From the outset, the company has had a strong customer focus, based on innovation and quality. In 2004, it received ISO 9001 certification. Customer demand for specific products, was the reason for launching an own food and accessories product line. From humble beginnings to over 300 products in its current private brand assortment, the company continues to fulfil client needs.

## New challenges

Today, TATRAPET is a thriving family-business, driven by energetic and enthusiastic people. As new technology- and data-based opportunities emerge and pet owners look for sustainable, nature-based products, so the company continues to bring innovative solutions. The latest addition to the product offering is The Natural Way product line. ●

## Milestones on the path to success

- 1988 Founding of TATRAPET
- 1989 Opening of the very first, big pet shop
- 1992 Opening of a new pet shop in hometown city centre
- 1992 Launch of own production line
- 1994 TATRAPET is registered as trademark
- 1995 Cooperation with international super- and hyper-market chains
- 2002 Opening of subsidiary in Czech Republic
- 2004 ISO 9001 certification
- 2005 Opening of subsidiary in Poland
- 2006 Opening of new warehouse
- 2008 First time presence at Interzoo
- 2008 Launch of innovative production technology
- 2010 Opening of new, modernised, high-capacity warehouse
- 2013 New line of products : The Natural Way
- 2014 Grand opening of first large-scale pet shop



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holapet SPAIN

# Holapet enters new partnerships with leading brands

In the firm belief that pets deserve only the very best there is, holapet works exclusively with leading brands in the food, hygiene and accessories markets in Iberia. The company distributes outstanding products, for virtually every kind of pet.

## Over 30-years of experience

Going way back to 1989, seed was planted when Manuel Ferrer's company - called PS AMIGO - invested all its assets in the purchase of a container full of IAMS' Eukanuba. On arrival in Barcelona, the container went to a storage facility where it was left unopened for months.

The Spanish market was yet to get accustomed to premium products for pets. In fact, selling high-price food proved to be extremely difficult.

## Successful sales

Trade shows, fairs, vets and breeders were visited to convince the market of the benefits of the innovative and high-value properties of this premium pet food.

Over a twenty-year period the firm, in the meantime re-named Iberamigo, grew to be amongst the biggest distributors in Spain with over 100 employees and a rapidly growing turnover.

## New partnerships

Five years ago, the long-term partnership between Eukanuba and Iberamigo was ended. It was then that Lluç and Montse Ferrer, Manuel's son and daughter, decided to leverage on their experience and launch a new company: holapet. This company represents Ferplast, the leading, high-quality pet-accessories manufacturer, in Spain.

The company's deep understanding of how innovation and quality benefit both

pets and their owners, has meant that it continues to be a leading distributor in the Spanish market.

It now also partners with other leading brands, including Bunny Nature – whose approach to small mammals nutrition is unparalleled – Vafo, distributing their superior petfood Carnilove across Spain, and Melanie Newman's premium canine grooming products across all European markets. ♦







# Grooming and wellbeing

Grooming is not just a fast-growing segment of the pet industry around the world, it is essential to our pets' wellbeing. What are the opportunities, and what is the pet industry's role in promoting responsible pet ownership?

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# Grooming for growth and wellbeing

PETS International spoke with Dr Roger Mugford, CEO and owner of The Company of Animals, about the huge potential of the grooming market and the pet industry's role in it.

## Market potential

A full 90% of dog owners have a dog that needs grooming, a survey by The Company of Animals found. Almost all dog owners have regular dog grooming requirements that would benefit from grooming products. While many already buy products to address their dog's needs, many would consider purchasing products for specific grooming issues. So there is a huge growth potential within the dog grooming market.

## DIY grooming products

Some 78% of the dog owners groom their dog at home themselves each month. Of these, three in ten groom their dog at least weekly, suggesting

that there is a strong market for more consumable domestic pet grooming products.

## What can the pet industry do?

The pet industry needs to maximise the consumer trends we are experiencing globally. One of these trends is the transformation into a digital society. People can influence other consumers' views and opinions on products and services online which could have a huge impact on consumers' purchasing decisions and overcome purchase barriers.

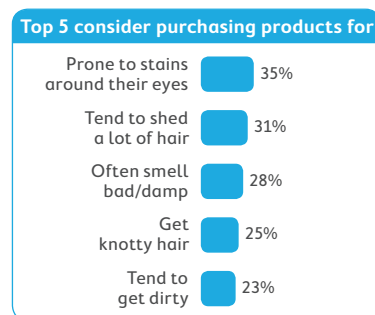
Furthermore, consumers are hungry for digestible, bitesize information, so it is key that the pet industry offer this information via a forum that they are



Base: 6,841



Base: varies by need (1,517-2,720)

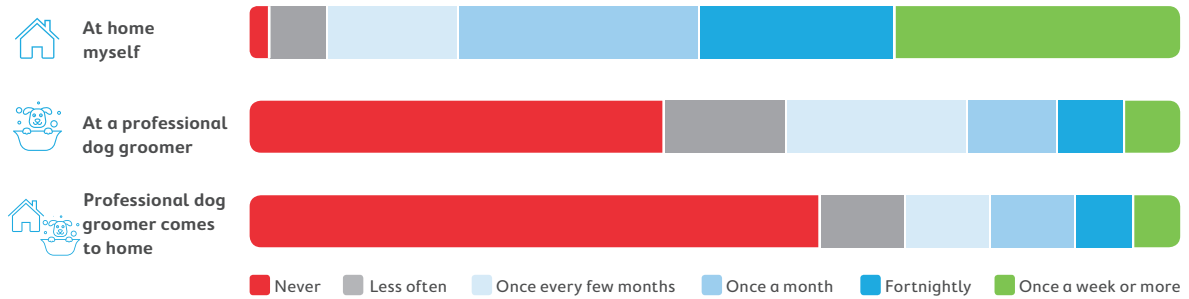


Base: varies by need (1,268-2,878)

Source: The Company of Animals



### Frequency of grooming



Source: The Company of Animals

Base: 6,841

already engaging with, such as digital, web and social. The use of online video training and tutorials highlighting the benefits of these products and services will maximise the growth of the grooming sector.

There is also opportunity in the humanisation trend. The tendency to see pets as one of us means there is a level of equality about pet welfare coming through that the pet industry can utilise to ensure that pets are being treated the same as us, and to engage with consumers on this level.

Another trend is the increasing integration of grooming into pet retail. This, together with the increase in dog ownership globally, means that there is growing demand for professional groomers.

### Consumer purchase decisions

The purchase decisions and barriers we have for us as a human are now becoming the same purchase decisions and barriers when purchasing for a pet. People are more conscious about the psychological and physical wellbeing of their pet and treating their pets as one of the family or as an equivalent of a child. With this comes a label-conscious, ethically- and environmentally-conscious society. We are more and more choosing products that don't harm our pets, looking at the quality of ingredients and ensuring they are effective.

### Responsible pet ownership

The pet industry has also the responsibility to stimulate responsible pet ownership. By grooming implanted in the pet store they have a unique

opportunity to do so, because grooming is not just about making your dog look pretty, it is about health and welfare benefits for you and your dog. When the dog is trained from an early age to accept and enjoy being groomed, it can be a wonderful bonding experience for the dog and the owner. Some studies have indicated that positive hormonal changes occur when humans and dogs interact.

Apart from the psychological benefits in a happy dog and a better partnership with its owner, neglecting to groom a dog can have some serious side effects, for example, flea, tick and mite infestations, hot spots, and severe and painful matting which can then lead to numerous infections and irritations. A matt-free dog is a happy dog.

Emphasising that grooming is a key part of a dog's wellbeing is important, together with numerous other key elements for wellbeing, including training, diet, exercise and social interaction. Training, for example, is vital for life expectancy, because a badly behaved dog dies young because people do not want to keep it as a pet.

All these benefits can easily be communicated to the consumer via the groomer in the shop, and with that it creates sales options. ♦

*Dr Roger Mugford is prolific author, educator and animal welfare advocate. Britain's leading animal psychologist and a pioneer in behavioural therapy, he founded, in 1979, The Animal Behavior Centre and The Company of Animals brand. For more information, please visit: [companyofanimals.co.uk](http://companyofanimals.co.uk)*



## Get smart about grooming

**If you thought pet grooming was about a simple brush through or a quick claw clip, think again.**

### **Pampering pets**

The health, fitness and personal appearance market is no longer restricted to humans and the research clearly shows that owners love to pamper their pets.

In a Mintel study (UK, 2015), more than a quarter of owners stated that treating their pets to a luxury experience was something they would happily do. The same study also indicated that the third highest expenditure on dogs (and the second highest for cats) was on outfits changing their appearance. Most significantly, 27% of dog owners said they get their pet spa-style treatments (source: One Poll, 2015).

In these days of pet humanisation, grooming falls into several categories for consumers.

### **Husbandry and welfare**

Animals require cleaning, brushing, claw trimming, ear and teeth cleaning and for some species, sometimes teeth trimming too. These are just a few procedures that keep them healthy and well.

Keeping them free from parasites used to be the biggest focus, but these days is by no means the only one. Humans have been breeding dogs and cats to have more exaggerated features and cats with very long fur, for example, cannot always manage to groom themselves, while dogs with skin folds or heavy coats, even hairless breeds, all need care.

While grooming products and services may promise human-sounding benefits, such as wrinkle-free skin or how to get your pet to 'look good naked', in fact, the animals' welfare is very much at the forefront of most grooming industry innovations.

### **Luxury is in high demand**

Shampoos, skin and paw treatments, brushes and so on should be part of every retailer's range, but the luxury ranges are what buyers appear to really value. Organic dog shampoos and special brushes, often designer brands, offer a high profit margin and give an exclusive feel. What customer wouldn't want the best image for their animals?

*Most significantly, 27% of dog owners said they get their pet spa-style treatments.*

(source: One Poll, 2015)

Providing a luxury range means that owners can feel like they are caring better for their dogs and cats, and the advent of more skin-friendly products, not to mention sustainable supply, can only be beneficial.

### Niche products for specific needs

Grooming has become more breed-specific, too. It is normal to see products aimed at specific dog coat types, such as de-shedding shampoos for Bulldogs, and silk coat shampoos for Shih-Tzus. Deciding your core market (usually evident from the local dog owning choices) is essential. For example, inner cities and younger generation owners tend to look for smaller breeds and fashionable ones, currently Pugs, Bulldogs and the famously popular Cockerpool.

Staff should be made aware that no customer wants their pet to be the same as anyone else's, so spending time on product selection and introducing customers to ranges that might suit their own pets' needs is preferable.

Of course, pets are not allowed to smell bad, so expensive pet cologne will round off the effect, often more highly priced than the human variety. The problem can be that such aromas are not welcomed by the pet themselves, a serious welfare concern that customers should be made aware for the pet's own benefit.

### Professional grooming services

As well as home grooming, there has been an increase in grooming salons and spas and this increased competition has meant grooming services need to be different to stand out.



A 'Pet Spa', modelled on the human spa, promises relaxation as well as treatments for the pet. These are particularly common in the US and growing in the UK, catering for cats, kittens, dogs, puppies, rabbits, hamsters and even the humble tortoise. Customers may be offered a 'Blueberry and Vanilla Facial' for their pet, or the more popular 'Fresh Breath Treatment'.

In short, to consider grooming as a simple brush through or quick claw clip would be missing out on a huge opportunity. In growth countries, you would be wise to follow the larger market trends, particularly the US, as pets win a bigger place not only in people's hearts, but also within their household budget. ♦



**Karen Wild**

Dog trainer and behaviour consultant  
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**Chadog Diffusion** FRANCE

### Gentle and effective pet cleaning wipes

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### Nail grinder rounds off the MOSER Animalline portfolio!

Paw care for all dog breeds is not only important during the winter months; paws also require a certain wellness programme throughout the year.

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The nail grinder complements the MOSER Animalline portfolio.

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## Pet grooming is booming

**Integrating a pet grooming service into a pet retail business model can build customer loyalty and be enormously rewarding.**

### **A massive market**

With Americans owning nearly 90 million dogs and 94 million cats, according to the American Pet Products Association and the APPA National Pet Owners Survey, there are plenty of potential clients for professional pet grooming services.

Out of an estimated 2018 total sales of \$72 (€84) billion in the US pet market, a sizeable portion of nearly \$6.5 (€7.6) billion is spent on pet services like grooming and boarding, up from \$6 (€7) billion in 2017.

Today's global marketplace clearly favours convenience, and a full-range shopping experience often motivates increased sales and repeat business. Expanding an existing retail pet business model to include grooming services can be an effective

way to stimulate growth, increase customer loyalty and ultimately drive sales.

### **Pet grooming services**

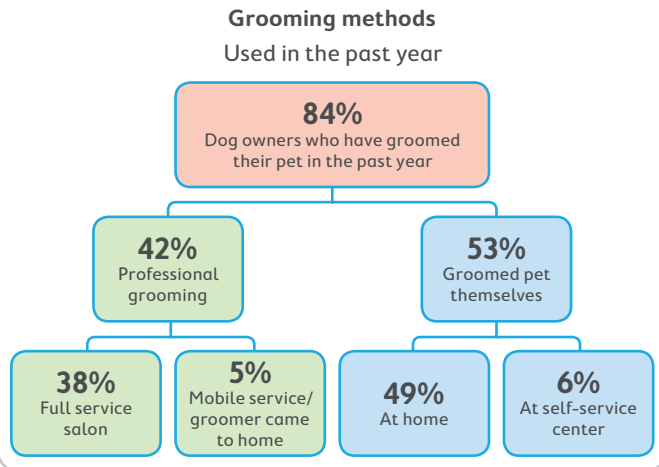
Over 84% of America's dog owners have groomed their pet in the last year. Of these, 42% use professional grooming services an average of nearly five times per year, either at a full-service salon (38%) or at a mobile grooming service (5%). Another 6% of dog owners use a self-service center and 49% groom their pet at home.

### **Millennials lead the way**

Pampering our pets is where it's at, with millennials leading the way on many fronts. More millennial cat owners take their pet to a professional groomer than owners from any other generation.



**The 2017-2018 APPA National Pet Owners Survey**  
Trusted consumer insights and market intelligence



When it comes to dogs, Builders and Baby Boomers are the most important segments, with 53% of Builders and 47% of Baby Boomer dog owners taking their dogs for professional grooming an average of 5.5 times per year. These professional service users are most often small dog owners and 50% report an annual income of over \$75K (€87.7K) or more, which means that they have the ability to spend on additional products and services while visiting their favourite grooming outlet.

Millennials are now the largest generation of pet owners at 35%, and they are also the largest group of grooming Do-It-Yourself-ers, being three times more likely to groom at a self-service station than any other generation. The overall number of visits to a self-service grooming centre has doubled since 2012 and millennial owners show great potential for conversion to in-store grooming, especially at DIY stations.

**Opportunities abound**

Integrating pet grooming services into a retail business model can be rewarding on many levels, and risks can be mitigated by employing the business basics of careful evaluation and a sound business plan.

*Integrating pet grooming services into a retail business model can be rewarding on many levels.*

Whether it be in-store professional grooming, a DIY grooming station or a mobile service, these services provide added convenience and value from outlets that pet owners rely on for quality products and information for the care of their pet. Since each type of grooming service is well suited to a unique demographic, opportunities exist which can easily be customised to specific retail circumstances. ♦



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# The changing grooming world in pet retail

**More and more, grooming is being integrated as a service in pet retail shops. What does this mean for the grooming industry? PETS International spoke to professional dog groomer, Marie Herder.**

**More and more, stores are adding grooming to their store concept. Do you see the retail sector as competition or is the market enlarged?**

I think there is a market for everyone. For small, easy treatments, dog owners go to a pet store. Self-employed groomers are often more specialised in, for example, health, medical and breed-typical grooming, among other things. Pet parents choose a good grooming salon.

**Pet retail offers grooming as an additional service. That means an expanding grooming market.**

**What is your vision of this regarding the development and quality of the groomers?**

In my time, in the Netherlands, you had to have a degree, otherwise you could not groom dogs at all. Nowadays there is no diploma requirement anymore. In Germany you do not have to be certified. It is different in every country. I find this very unfortunate because you work with a living being. Basic knowledge is super important and I even advocate compulsory training. I regularly follow workshops and visit shows to stay up to date on the latest developments and trends.

**When it comes to grooming, you tend to think first of dogs, what about grooming for cats?**

Many cats already go to a grooming salon. There are colleagues who only work with cats. You see also more and more rabbits in the grooming salon.

**What are important trends in the grooming world at the moment?**

I notice in my salon that dogs are now really seen as family members. Owners think it is very important how the dog is handled. It used to be that they brought the dog and said: the dog is dirty and this has



to happen. Now owners also come along for a small interim treatment. I have a little store in my salon and a lot of owners buy something extra for their dogs.

### Looking ahead, what are challenges for the groomer's world?

We need to inform and bring out more what groomers can do for the dog owners. These days, some owners see their dog as a child. By treating them like that, the dog doesn't know how to behave like a dog and that can complicate the grooming process. That is why cooperation with good dog schools is very important, so dogs are well trained and therefore well treatable in the salon.

Furthermore, more cooperation is needed between groomer, veterinarian, dog school and retail. Each must focus on what he or she specialises in and we must refer to each other so that the dog gets what is best for him or her in the context of animal welfare. ♦

*Marie is a professional allround dog groomer. She takes part in international championships and competitions, mostly with one of her King Poodles, and has won several prizes.*

For more information: [hundesalonherder.com](http://hundesalonherder.com)

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# Grooming is growing in China

Style, precision and technique are highly prized in this growing professional segment.



## Rapid development

Over the last 20 years in China, the pet market has developed rapidly into the fast-growing market we see today. Hand in hand with this development, China's grooming industry has also started to grow as a professional segment and Chinese groomers are increasingly being recognised on the international groomer platforms.

Due to the limited living space, in most Chinese cities, smaller dogs are especially popular. These small dogs need grooming to be seen as nice and also as trendy. The fashion element plays an important role.

Meantime, there are now 2,000 grooming schools in China, to train the groomers. To boost grooming further in China, an important tool is WeChat: a messaging and calling app that allows you to stay connected easily. Groomers share their work via Wechat, via friends, circles or public accounts.

## A plus for pet retail

In China, the majority of pet products are bought via e-commerce platforms. Therefore, the traditional pet retailer is forced to add additional services such as grooming to the shop concept to compete. Grooming is a popular service to add.

This also means that the groomer needs to stay up to date on the newest trends and sophisticated skills.

At the Headman Grooming School, there are 20 C level groomers, and 40 higher B and A level groomers – an indication of how seriously pet lovers take technique.

## Style trends

Consumers' growing interest in the latest grooming styles and trends is also reflected in the increasing number of grooming dog shows that are held.

What are main trends at these shows? It appears that:

- Precision and the technique of the groomer is important.
- China does have its own grooming style of the dogs. For instance, the Asian Meng style. This style is also picked up by other countries such as Japan. For groomers it is the challenge to outperform others in this style.
- Creative styling usually involves fur dye, but this is not very popular in China due to its higher cost and because it is less practical. Besides, the Chinese Animal Protection Organisation is against it due to the negative influence on pets' health, and the long application time which is considered as inhumane. ♦



**Meadow Zhang**

China International Pet Show  
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# Internet of things

Are IoT, big data and blockchain the innovation drivers for the pet industry? More and more new players are entering the industry with many interesting applications. Besides that, it is also impacting the business process.

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# IoT, big data and blockchain (IBB) Innovation drivers for the pet industry?

**As more new players enter the pet market with apps integrated in product applications, IBB is making its mark.**

## IBB

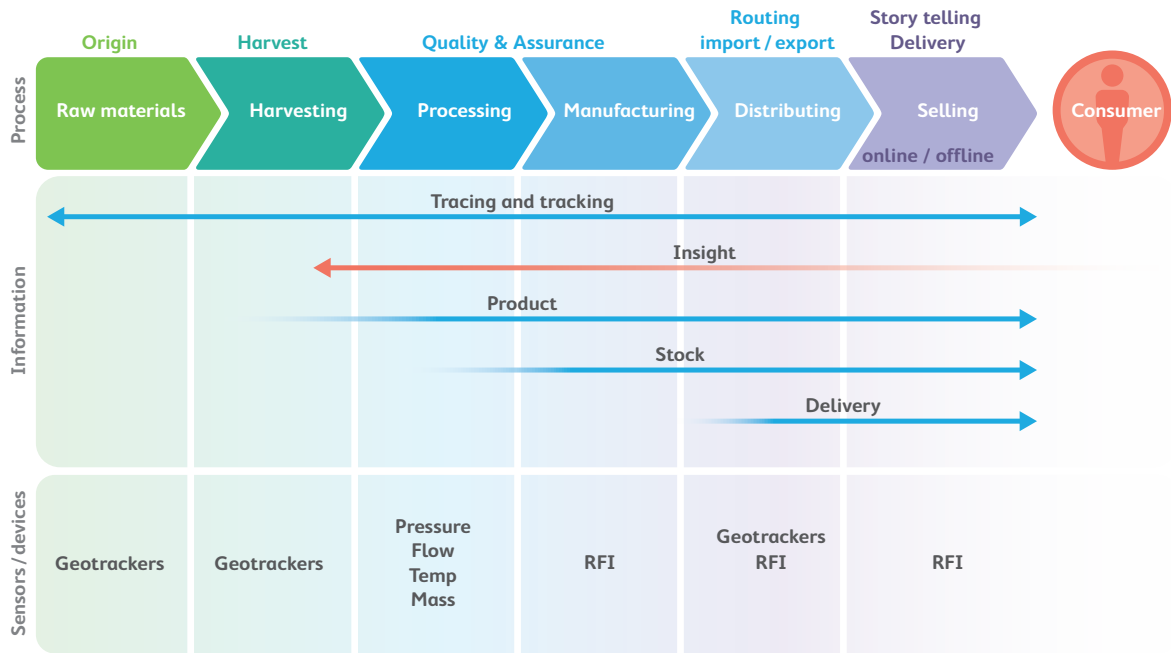
The internet of things, big data and blockchain, together also known as IBB, are making their mark on the pet industry. In fact, IBB is a trend that is opening the road to many interesting applications. So what exactly are the innovation drivers and how will they effect us? From accessories, food and ingredients, through to production; the future of IBB is set to bring change.

## How it all started

It all started - only just a couple of decades ago - with the internet. Connecting everybody in ways we had never been connected, the internet has since become a basic life necessity.

Next came IoT: connecting everything to anything or anyone, anywhere. IoT basically enables a sensor or device to connect to the internet and send or





*In the whole production/supply chain process you can collect information by using sensors and devices.*

retrieve data. Sensors and chips have become so small and cheap to produce, that their applications are unlimited and opening up a new world of opportunities. This world is called big data. It is the huge amounts of data produced by sensors and chips. Such data can provide enormous insights into behaviour, business processes and much more.

The major challenge is that such data is only usable and of value if properly stored, analysed and processed. Data must also be relevant, valid and traceable.

Another challenge is the prevention of misuse. That is where blockchain comes in. Blockchain is a secured and distributed environment that logs all alterations to a certain data set. Alterations are transparent to all and cannot be manipulated. Probably the most well-known example of how blockchain can be used is the Bitcoin.

**IBB and its impact**

There are three domains in which IBB is set to leave its mark:

**1 - The public space**

This is about applications in cities, roads, airports and more. Although set to have a massive impact, applications in this space are less relevant for the pet industry.

**2 - The business space**

It is not only the newcomers whose products or services are based on IoT that will define the business space. Traditional manufacturing too will benefit from new opportunities created by IBB. With more and more information being required by law (for instance regarding sustainability), such information can be made available, anywhere any time, including historical data, thanks to IBB. In addition, increasingly consumers demand to know the story behind the product: all the way to its source.

On the production and supply side, e-tailers are looking for solutions that bring more efficiency, just-in-time production and minimal stock, preferably higher up in the supply chain. The end goal of all such efforts is to increase customer satisfaction.

To implement such a supply chain [▶ SEE NEXT PAGE](#)

# PETKIT

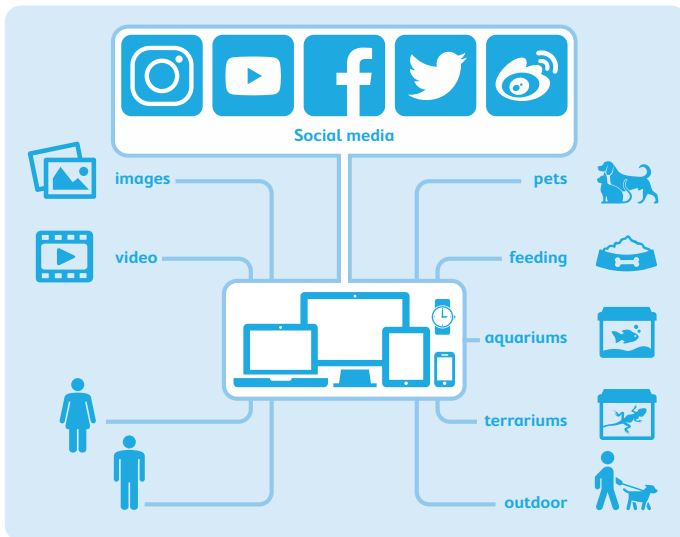
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will require new devices and data warehousing. It will also require efforts to redesign and remodel business processes, all of which call for considerable investments.

### 3 - The private space

In the private space, IBB is set to make life of consumers more fun, interesting, easier and safer. For instance, with wearables that measure a person's general health as well as physical activity. Garden sprinklers and lights can be switched on and off using your phone, wherever you may be. As regards pets, smart cameras will open up new possibilities to monitor pets while the owner is away from home.

Sensors on feeding bowls and litter boxes feed your cat and tell you when they need to be replenished. Pets can let themselves in and out of the house thanks to IBB-based sensors. The only 'but' is that all these devices have to be connected to the internet. Additionally, pet owners will want to be able to share photos and fun information of their pets on social media.

Already, at Interzoo there were many app-driven products, such as: intelligent pet tags, the Internet of tanks and smart doors, feeding bowls and leashes. Most of these are still only app-driven.

However, once products become data-driven they will provide invaluable insights into both consumer and pet behaviours. These, in turn, can be used to create even better and healthier products, tailored to individual pet needs.

### Industry changing innovations - new opportunities

Breakthrough innovations in the pet industry will come from the three sources described above. With them come new opportunities in personalised products, pet health monitoring and value-adding direct marketing. Privacy issues will be the next main challenge. In order to fully benefit from new opportunities, an integral approach is required: where developers of products and services work in close collaboration with IT specialists.

### What are your challenges?

Is there a business case for you? What data do you need to improve your processes and fulfil your customers' needs? Will real-time data be a business changer for you?

Read more about how data can work for you in the Innovation section of this magazine, starting at page 48. ♦



**Gerard de Niet**  
PETS International  
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Catspad FRANCE

# The innovative way to feed cats

## The dispenser that also takes care of cat health.

### How to feed a cat when you are away?

Three years ago, in the middle of her vacation, Julie Leleu had to rush home because she was worried about her cat: the friend who was supposed to look after her little Mozart had fallen ill. The initial idea for a cat food dispenser was born.

Partnering with veterinarians, Leleu soon learned that cat obesity is one of the biggest health risks for cats. In France, 40% of cats are obese. In the US a staggering 60% of cats weigh more than they should for a healthy life. Combining this insight with her experience as worried cat parent, Leleu and a team of engineers designed the Catspad dispenser.

### Learning from nature

Taking its example from the way in which cats forage in the wild, Catspad offers cat owners the best of two worlds:

a no-hassle way to feed your cat and do away with bad eating habits.

### Feeding your cat, wherever you are?

The Catspad dispenser is a unique product that dispenses both water and food. Using an app that connects to the dispenser and a cat's microchip, the pet owner can schedule meals for a month.

The app also keeps track of the cat's feeding habits (and of multiple cats if you have more) to help prevent potential eating disorders. An added benefit that appeared during the product's test phase, is that the dispenser reduces the sense of urgency to eat and thus diminishes tension between cats.

### Product development

Based on the idea that in the wild, cats hunt and eat fresh food many times a day,

the dispenser allows cats to express their natural behaviours and thereby helps diminish health risks. The care given to product design means that the dispenser integrates seamlessly into any home decor. Catspad currently ships to over 45 countries and is set to expand to the American and Japanese markets.

### Beyond the Catspad

The design of the dispenser is based on a network of several connected products. The company intends to create more cat and dog products using the internet of things over the coming years. ♦

♦ **Catspad**  
info@catspad.com  
catspad.com

# IoT and big data

## Impacting business models in the pet industry

**As connected technologies are opening up new business opportunities and pet owner needs are shifting, it is time to find out how data can boost your business.**

### **It is all about data**

Exchanging data with each other has become such a fact of life, that we sometimes forget how in a short space of time, much of what we do is dependent on being connected. Whether you want to connect with your friends, order a pizza or find a pet sitter for your dog during your next business trip, we have become used to doing it all with just a couple of quick swipes and clicks on our mobile devices.

As soon as, as expected, an increasing number of connected devices find their way into our homes, this trend will reach new heights. Take Google, Amazon, Apple, Samsung, Hisense – or for that matter any other big technology or device company. They are all looking to enter into every aspect of our life. Why? To harvest data about us and our behaviour and subsequently be able to offer personalised experiences, goods and services.

### **What about the pet industry and IoT?**

The pet industry too is undergoing change as many companies are entering the market that have a business model based on connectivity and data collection. Recently, at Interzoo we saw a multitude of manufacturers bringing to market tracking devices, connected feeding device dispensers, smart accessories and the likes. Historically, devices sales are not a very high margin business, except for the premium segment.

Most of these companies cannot survive selling only devices. Income is mostly generated through matters related to big data, machine learning and artificial intelligence. The advancement in all three of these technologies and the broader adoption of them, will create multiple new revenues, as they unlock the power and the value behind customer data.



### Data as asset

In fact, if you know how to gather data accurately, quickly and on a large scale, data on millions of customers becomes a very profitable asset. Whether it is by way of customer and market studies, advanced customer analytics or simply advertising, your data can be a powerful competitive advantage for both brands and retailers.

### Online platform for pet health

At Barkibu, data has been at the very core of its business model base since the company's inception. Over the past four years they have built a platform that directly and quickly helps animals: the mission of the company. They offer free medical advice for all pet owners, as well as a free marketing platform for all vets, where vets can create a profile and directly interact with potential customers near

their clinic. The company's goal has been to make the platform commercially viable, without reaching into the wallets of their customers.

### Using data to make it personal

Barkibu has achieved its goal by asking visitors to provide information on themselves and their pets, in exchange for accessing the platform. This data is stored and analysed on the Barkibu Intelligence Unit platform and subsequently made available to retailers and brands in the pet space. Based on this data, retailers and brands can personalise products and services.

For pet owners this means that, as long as they are willing to share their data, they can expect to benefit from convenience services. Dog food delivered to your doorstep by yadoggie.com without even having to order it. Retailers using their stores as temporary warehouses in order to cut down delivery times, as is the case with Alibaba's Hema supermarket. And device makers connecting your pet's bed to the Google Nest thermostat in your house, so that the room temperature is adjusted as soon as your hairy friend goes to bed.

### A profitable, data-centric future

Making your business ready for a connected, data-centric future will require considerable investments. But, if done properly by using the expertise of data analysts, data scientists and multi-channel marketing and retail experts, you are set to benefit greatly from personalised client communication. Barkibu has the know-how to help you put in place a smooth transformation process. ♦



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# Innovation in pet food

**Big data and blockchain, ethics and the environment: new technology and new types of customers are driving innovation in pet food. We explore the cutting edge.**

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# How does your data flow?

Data is flowing everywhere all around us. But is it supporting quality of life for us and our pets, or a threat?

## Benefit or threat?

Data flows whenever there are inputs to a system, resulting in outputs. For many, modern data flows positively benefit us in the lifestyle choices we make. We may choose to use social media, like Facebook, Instagram and Twitter for commonplace communication, fitness trackers as wearable technology to help keep ourselves and our dogs in shape, and the Amazon Dash button to order our pet's dinner at the press of a button.

For others, however, the vast amounts of data out there are seen as a threat that 'Big Brother' is watching us and our personal data is not safe. Last year's Facebook scandal<sup>1</sup> certainly did little to allay those fears, and has lent extra significance to the current focus on the EU General Data Protection Regulation (GDPR) that came into effect earlier this year.

The examples of 'traditional' and 'topical' data flows in Table 1 illustrate the diversity of data moving around.

## Disruptive data

Although many have heard the phrase big data, few understand it and its benefits. Gartner (2012) usefully defines it as 'high volume, high velocity and high variety information assets that require new forms of processing to enable enhanced decision making, insight discovery and process optimisation.'

The 2017 Data & Analytics Report by MIT Sloan Management Review highlights that increasing numbers of businesses are gaining competitive advantage from the use of big data.

<sup>1</sup> '50 million Facebook profiles harvested for Cambridge Analytica in major data breach' – The Guardian, 18 March 2018



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One way in which they can do so is through disruptive innovation, whereby typically a smaller company can disrupt the market and unsettle bigger players with new or innovative technologies, faster product development and market introduction, using tools like big data and the Internet of Things (IoT). Competitors then have to scramble and ‘waste’ resources deciding how to respond. And if they choose not to respond, the disruptive innovator can quickly gain significant market share.

Specifically, in the food – and pet food – industries, disruptive innovation can include new technology that reduces food safety risks and improves traceability more efficiently and quicker than conventional approaches. Examples from the food industry, with potential applications in pet food, are shown in Table 2.

### The buzz on blockchain

Blockchain is a technology based on cloud based databases delivering secure storage of data in a way that does not allow the records in the database to be changed. Data flow (input and output) is allowed on a permission basis. This enables stakeholders such as food ingredient suppliers and food manufacturers to input food safety and food quality data into the cloud, in a way that is secure and does not allow change without leaving an audit trail of who and why the change was made.

Similarly, it allows output of data on quality and safety for stakeholders who require to see this. In addition to allowing stakeholders access to quality and food safety data, it also allows full traceability through the supply chain. Traceability is important

**Table 1 – Examples of ‘traditional’ and ‘topical’ data flow**

Type of Data Flow	Input	Output
<b>Traditional</b>		
Financial accounting on cost of goods sold and sales on new pet food format	Cost control / sales data	Return on Investment (ROI) / profitability data
Dry pet food cost optimisation	Poultry meal composition data	Cost optimised recipe
<b>Topical</b>		
GDPR	Personal data of individuals and organisations	‘Cleaned’ database of contacts who have agreed to their data being kept
Social media	Facebook posts, Instagram pictures, Twitter tweets	‘Social’ interaction
Fitness trackers	Steps count; GPS location tracker; heart rate	Data to track location and monitor fitness levels
Amazon Dash button	Digital communication to Amazon, by pushing a button	Reordering and delivery of new supply of dry dog food
Analytic innovation through supply chain partnership	Shared data / analytics between collaborating partners	Shorter lifecycle to bring new or improved products
Blockchain	Food quality / safety data	Reduction in food waste, greater confidence in safe food
Food safety	Food irradiation data	Greater confidence in safe food supply chain

**Table 2 – Examples of Big Data use in the food supply chain**

Feature	Basis	Benefits
<b>Examples</b>		
Rentokil PestConnect	50,000 globally interconnected, automated pet detectors generating 25 million messages and alerts / year <sup>(1)</sup>	Predictive modelling to allow forward control; more effective pest control programmes with reduced food safety risks; demonstration of due diligence
Initial HygieneConnect	Wireless monitoring of soap dispensers and movements through washrooms <sup>(2)</sup>	Improved compliance with hand washing; improved hygiene standards and reduced food safety risks
fTRACE GmbH Food product provenance and traceability	Barcode scanning on food products using mobile phone app <sup>(3)</sup>	Easy traceability for the consumer to check the provenance of food e.g. MSC certified sustainable fish
Safecast	Safecast is an international, volunteer-centred organisation, collecting and making available data on environmental hazards, set up after the Fukushima Daiichi Nuclear Power Plant meltdown in 2011. <sup>(4)</sup>	Monitoring of environmental pollution levels e.g. radioactive nuclides. Allowing consumers and food manufacturers open access to data to ensure safe food supply

(Sources: GFSI Blog<sup>(1)</sup>; Initial website<sup>(2)</sup>; fTRACE website<sup>(3)</sup>; Safecast website<sup>(4)</sup>)

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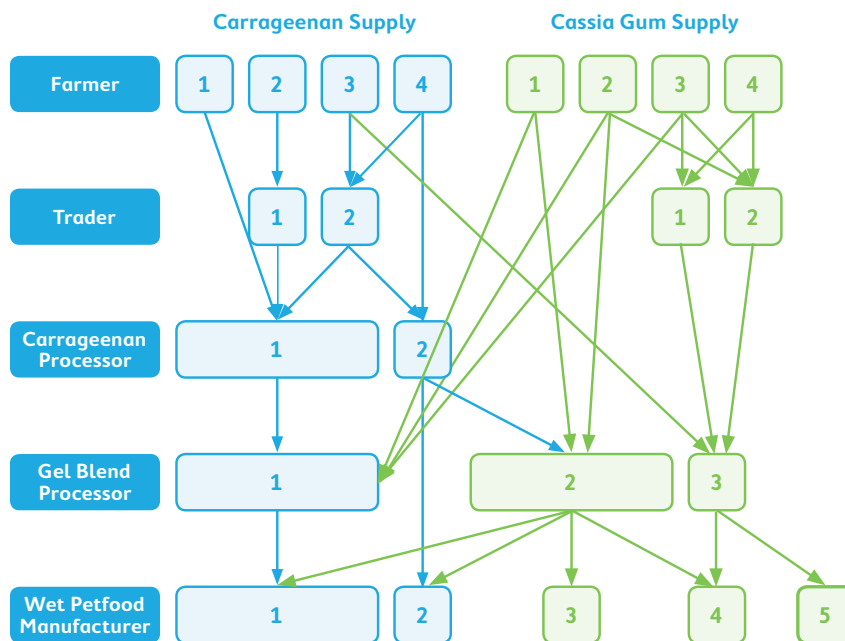


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Diagram 1 – Gel blend supply chain for wet petfood



where quality problems exist and especially where there is a food safety problem, for example dioxin contamination, that could affect many different pet food producers. Another future key role for blockchain will be in combating food fraud (economic adulteration of food), like the case of melamine contamination of wheat gluten in the pet food industry in 2007 – 2008.

By nature, global food supply chains are fragmented, as the example of supply of gel blend for use in wet pet food shows in Diagram 1.

The combination of blockchain with big data and the IoT, for example, RFID technology, further enhances the capability of the blockchain technology. However, as with any data-based system, one potential limitation is freedom of access, in other words, which stakeholders have access and the quality of the data input. As the saying goes, ‘garbage in – garbage out’.

While some major corporations, for example Walmart and IBM, are collaborating to develop blockchain, the technology currently has limited application in food and pet food supply chains.

### Cybersecurity fears

Will the big data bubble burst over cybersecurity fears? Cyber security experts CSO estimates that by 2019 ransomware attacks on computer systems will occur every 19 seconds ([www.csoonline.com](http://www.csoonline.com)). Coming on top of the recent Facebook / Cambridge Analytica incident, such predictions will surely increase fear and doubt in people’s minds further.

Acknowledging the growing threat, the British Retail Consortium have added a section on cybersecurity to their well-respected, globally recognised BRC Global Standard for Food Safety in the latest version (Issue 8). All manufacturers certified to BRC, including a significant number of pet food manufacturers, will have to include cybersecurity into their food safety management systems, otherwise they will fail their next certification audit when the new standard goes live in Q1 2019. ♦



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## Transparency: the all-important ingredient

**Blockchain is about to change the pet food industry for the better, as it makes 100% transparency the norm.**

### **100% transparency**

All around the world, blockchain is touted as a revolutionary technology with endless possibilities. More than just a buzzword, it has the potential to disrupt every industry from banking to science, the pet food industry included. Blockchain is about to change the pet food industry for the better, as it makes 100% transparency the norm. Producers and consumers demand safe

and sustainable quality products, but without documented proof they are not buying anything.

The idea of sharing information in secured digital ledgers may be new, but the concept behind it has proven itself in the past. For a long time, transparency has been a selling argument. Pet food producers and their supplying partners go to great lengths to inform their customers

on all imaginable product details, from the origin of the source material to the method of preparation and even the means of transportation.

The only problem is bias. Since all information is handpicked, there is no guarantee that it is fully and faithfully presented. Blockchain does not allow anyone to mark their own papers. The technology automatically and





## Innovation in pet food

competition. As it is, if you have no proof to back up your quality claim, you have no business in pet food.

### Quality mark

As promising as blockchain is for the pet food industry, it also raises some fundamental challenges. One of the main concerns is the protection of business-critical information. What if sharing benefits the competition? What about exclusivity when everybody has access to the source?

IQI finds the answer in solid contracts and exclusive distribution agreements. The company's product documentation is just as revealing as the data provided by new technology and never in its history has IQI's openness posed any threat to its business. Instead, the IQI Quality Passport is widely regarded as a quality mark.

The company earns trust by sharing information, and pet food producers can do that too. Providing the right information, a QR-code on the packaging becomes an instantly recognisable and profitable quality label. Imagine this: you can determine if a product is USDA, FDA, AAFCO or FEDIAF approved by a simple phone swipe. That is where technology translates into business. ♦

independently logs all information in the process, and – that is the breakthrough – offers everyone who is interested unrestricted access to full and accurate product data.

### No proof, no business

Consumers are becoming increasingly conscious about the origins and qualities of their food. And in line with the trend towards pet humanisation, high demands are also placed on the quality and integrity of pet food. Blockchain, through its integrated network technology, guarantees complete visibility at all stages of the supply chain. Pet food producers willing to share that much information, can literally prove that they have nothing to hide. By being completely open and honest, they can win consumers' trust and distance themselves from the



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# Assuring high quality pet food production



Frequent analysis of homogeneity and carry-over is needed to guarantee product safety and excellence for consumers in the pet food industry.

### Accurate mixing

High quality pet food is characterised by homogeneity and the assurance that each pet gets all the micro-ingredients, such as vitamins and minerals, specified to the consumer. Therefore, as well as ensuring excellent mixing, pet food producers should pay attention to carry-over in their plant of ingredients from one batch to another and conduct frequent analysis of process performance with respect to both these aspects in each production line.

Pet food companies usually produce various products in one production line. Excellent homogeneity is required to reduce the risk of a deficit or excess amount of any micro-ingredient in the food. Mixing accuracy is also a pre-condition for reducing carry-over, or cross-contamination of material or product from one batch to another in a production line.



### Health risks

Failure to avoid carry-over of compounds could carry risks of health complications in animals, or even disease. For example, carry-over of the antibiotic salinomycin into pet food vitamin and mineral premixes caused illness and deaths in 1996, in 21 cats that ate dry pet food contaminated with this toxic material.

### Regular checks

To guarantee product quality and safety, it is therefore essential to conduct carry-over and homogeneity studies to check mixing properties and carry-over in mixers and other production parts. Identification of a source of inhomogeneity and carry-over enables corrective action to be taken and the adjustment of equipment to eliminate the problem.

Nowadays, recommendations from authorities in many countries and the GMP+ directive demand a regular check for all production lines with regard to homogeneity and carry-over every two years (BAOZ control of residues, version 1 July 2017).

### Using microtracers

Several indicator substances are typically used to measure homogeneity. Microtracers have successfully been used since 2006 and represent a major improvement over traditional analytics with cobalt or manganese.

Microtracers are irregular shaped iron particles, coated with registered food dyes. Simply added to the mixer they have practical advantages – they are stable, robust, non-toxic and versatile and can be re-used for each batch of feed. This simple, fast, direct method provides accurate analysis and is applicable in raw meat, making it ideally suited to pet food production.

### Expert analysis

MTSE (Micro Tracers Services Europe GmbH) is specialised in the performance, analysis and reporting of studies based on Microtracers. It has many years of experience in supporting manufacturers in guaranteeing high quality in pet food with tests of mixing accuracy and carry-over. The company offers a wide array of services from know-how transfer to support on-site, such as sampling and analysis on-site and training of employees. The analytical procedure is carried out for customers using a Rotary detector® and the reliable counting software Traco® image assessment.

In future, the demand for high quality pet food will increase and the Microtracer method as a routine method for checking mixing accuracy and carry-over will thereby support manufacturers in building trust in their pet food products. ♦



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# Debunking pet food myths

Even in the age of the internet, the majority of pet owners are still led by myths, which can easily be dispelled by specialists.

## MYTH No. 1: Fresh meat over meat meal

The data is in: raw meat contains approximately 70% of water and only 15% of protein, meanwhile, meat meals contain approximately 5% of water and 70% of protein. The meals are made by drying and grinding meat in order to remove water and retain only concentrated meat protein, therefore, its amount in a pet food is highly important. Since the meal is concentrated and the daily intake of necessary nutrients is retained in a small amount of pet food, there is room for other irreplaceable functional ingredients.

## MYTH No. 2: Poultry is an inferior ingredient

In highest-quality feeds, the essential energy source should be animal protein because dogs and cats absorb the necessary nutrients only from such

protein. The best sources of it are lamb, salmon and poultry, however this last gets criticised a lot.

Actually, poultry provides irreplaceable amino acids and it serves as the construction material for muscle mass. Poultry is also the best protein source for puppies and kittens since it is easily digestible. And it is necessary for overweight pets because, due to its light mass, poultry delivers the required energy without stuffing the pet's organism with additional calories.

## MYTH No. 3: Plant oils should be avoided

Feeds containing linseed, borage, and coconut oil are actually recommended. Coconut oil is also called a 'superfood' as it possesses over 30 benefits for pets: among other things, it contributes to maintaining healthy skin, shiny and

thick coat, it moisturises pet's skin and stimulates wound healing. In addition, coconut oil improves the condition of the immune and digestive system and stimulates brain activity, which is highly useful for senior pets.

## An ultimate mythbuster

HiQ is ready to bust any myths that keep customers from providing the best daily nutrition to their beloved dogs and cats. The company believes that the greatest products are born by combining deep scientific research with gifts of nature. That is why HiQ feeds contain high amounts of animal protein from lamb, salmon or poultry meals and the globally valued 'superfood' – virgin coconut oil. ♦



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# Natural care for high-quality pet food ingredients

**Antioxidants are vital for maintaining quality and extending shelf life.**



## Why antioxidants?

Poultry fats, vegetable oils, fish oils and all lipid-rich sources of nutrients for pet food react spontaneously with oxygen and form free radicals. Thereby fats turn rancid and vitamins lose their activity. Protecting feed components with antioxidants is thus vital for maintaining food quality.

Synergistic antioxidant blends, such as Loxidan, protect pet food against lipid-oxidation and ensure high product quality for up to 24 months, 100% natural. Liquid formulations can also be sprayed on animal by-products or mixed directly into fats.

## Issues with estimating efficacy

The determination of antioxidant efficacy and minimum durability is a complicated and tedious process. It strongly depends on the composition of the product, the production conditions, the packaging, the presence or absence of adequate antioxidants and the storage conditions (temperature, light, humidity). There are a number of different methods for estimating antioxidant efficacy and product storage life.

Moderately accelerated **storage trials** were developed to estimate durability more rapidly, whereby the product is stored at constant temperatures while primary and secondary oxidation products are measured.

## Quick test and storage trial methods compared

	Storage trial	Quick test
<b>Conditions</b>	Atmospheric pressure Temperature 40 °C – 60 °C	High temperature (up to 180 °C)
<b>Sample</b>	Liquid (extracted fat)	Solid, liquid
<b>Experimental time</b>	Weeks / months	48 h
<b>Measuring principle</b>	Oxidation under moderate conditions Analysis of key parameters at regular intervals	Rancimat: change of conductivity Oxipres: consumption of oxygen
<b>Result</b>	Peroxide Secondary oxidation products	Induction time
<b>Pros</b>	Realistic conditions Accurate prediction of shelf life	Less time-consuming
<b>Cons</b>	Time-consuming Expensive	Harsh conditions may disturb results

**Quick tests** are based on the oxidation of a sample under high pressure and temperature. They are suitable for a quick and cost-effective, qualitative comparison of antioxidant efficacy in fats and oils. However, it is not possible to obtain a plausible estimation of storage life. Trials at high pressure and temperature do not correspond to real storage conditions and the mode of action of antioxidants can differ. Only one parameter is measured, and no further information is given about the previous oxidative status of the sample.

## A more reliable method

For a more reliable determination of shelf life it is advisable to invest time and money in accelerated storage trials under moderate conditions. The experimental conditions are very close to reality and the regular measurements of oxidation-relevant parameters make them suitable for determining the durability of complex pet food matrices. ♦



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# The world is changing



## How do pet food brands stay relevant and meet the needs of millennial customers?

### Doing the right thing

The world is changing faster than we have ever known it and the desire of business and consumers to be seen 'doing the right thing' has never been stronger.

So what does this mean for pet food in the new world? How do pet food brands stay relevant and most importantly how do brands ensure they 'do the right thing?'

GA Pet Food Partners creates recipes that provide brands with unique stories to tell and ingredients that provide claims aligned with the brand image and ethos.

As the company has numerous requests every day for new product development, it is able to sense the 'mood' of the industry and monitor the variety and volume of requests being made.

### Global recipe trends

It may not be surprising to hear that organic, vegetarian and indeed vegan recipes are beginning to gather momentum. Indeed, it is a global trend

that we are witnessing as recipes are derived from the human food shelves.

What is the catalyst and driving force behind such recipe requests?

The answer lies in the new conscience emerging in society. The rise of the environmentally aware and switched-on eco-consumer has resulted in a desire for food that not only delivers nutritionally but which is crucially kind to the environment.

### A new type of customer

Now is therefore a suitable time for key marketing claims, such as ethical production, sustainable production, ethically sourced and responsibly sourced raw materials. It is not only the contents that demand attention: the packaging must also align, using claims such as recyclable, compostable and responsible.

The buying criteria for customers are changing and nowhere more so than among the UK millennials who are

distinguished by their propensity to side with brands that are underpinned by ethical principles.

Brands need to go beyond offering products and services for millennials to buy - they need to make a positive impact on the world. This can be done using ethical production, sustainable raw materials and of course responsible packaging.

### Delivering change

At the heart of making a positive change is authenticity and transparency, and those brands that deliver will build trust with a customer base that, due to technological advancements, has a greater impact than ever on a brand's success. ♦



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## Clean label

Ill-defined it may be, but clean label is also an increasingly important concept for pet food product innovation and growth. Time to unpack the hype and zero in on the necessity of this growing trend.



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# Rising to the clean label challenge



**Developing product to meet the demand for clean label is not easy, not least because the concept is ill-defined. Limited ingredients and shelf-life issues add to the challenge.**

## What is clean?

They say that cleanliness is next to godliness. The dictionary defines 'clean' from three views. One, it is free from dirt and stain. Two, it is morally uncontaminated and upstanding. Three, it is free from irregularities and has smooth lines. All of these definitions do not seem to describe this new food category.

Having read dozens of marketing research articles from the food industry about clean label, one thing is clear: there is very little agreement what a clean label is. One writer actually said the definition is 'unclear'. That was an honest, upstanding and clean response.

One survey reported that only 38% of consumers indicated they had a pretty good understanding

of the definition of a clean label. For them, it included farm grown, sustainable, minimally processed and real ingredients, and simple labelling. Another reported that a clean label was to range from natural to organic, non-GMO, no artificial ingredients, be free of negative ingredients and contain fruits and vegetables.

## Less is more

Perhaps a consumer will know a clean label when they see one. There must be a halo or glow around a clean label in that it is simple, transparent, uncluttered, easy to grasp, focused on health and wellness, sustainable, and wholesome nutritionally. In short, the consumer is looking for a package that is ecologically focused, with understandable messaging, limited ingredients and healthy products inside.



The clean label concept is also tied in closely with the limited ingredient marketing niche in foods, where the emphasis is on using fewer ingredients. This is truly where the phrase 'less is more' resonates.

While the consumer may not understand the food science and nutritional challenges behind building a 'clean' product with multiple definitions, the blogosphere will underscore what they think is acceptable.

### Difficult to develop

What is certain is that this multi-faceted concept offers significant challenges for the product developer.

When considering the product development efforts needed, we always describe the 'degree of difficulty', much like a diver or skater prepares for different athletic events. Products like these are challenging because there are so many limitations involved in the process, product goals and the ingredients to pick from. Coupled with a lower chance of success is an increased product risk from stability and shelf-life. Some products with a higher difficulty for microbial control and rancidity simply seem too challenging. The degree of difficulty makes a good developer not want to dive in.

Part of the response on clean labels focuses on limiting processing of foods. Conceptually, the push to speed something from the farm to the table is preferable. However, many consumers have not yet grasped that limitations placed upon a product will lead to a decline in potential shelf-life capacity. The risk for microbial failure will rise. Perhaps having products that are not 18-month shelf-stable would be a good perspective for clean food products. Nevertheless, stability is critical, as many regulations are in place with the advance of food processing regulation.

### Rising to the challenge

Clean-label marketing definitions are confusing, but the perceived needs of consumers are escalating. Coupled with the internet confusion from self-proclaimed experts, the end result is challenging and difficult. Nevertheless, our industry has risen to various challenges and I have no doubt that the clean label definition will become clearer in the coming years. ♦



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# Clean label: minefield or goldmine?

**Vaguely defined, unscientific but based on real consumer wants: getting behind the marketing hype of clean label.**

### Consumer perceptions

I first came across the concept of clean label in the very late 1980s. I was working in the starch industry and developing products which included chemically modified starches. If these ingredients were included in products, they were shown on the product label with an E number. E numbers were assigned to a wide range of ingredients and some of these ingredients were being highlighted in the popular press as ‘not good for you’. It was found that starches could be modified with heat and pressure to have identical properties to that of chemically modified starch. The physically modified starch did not need to be listed with an E number.

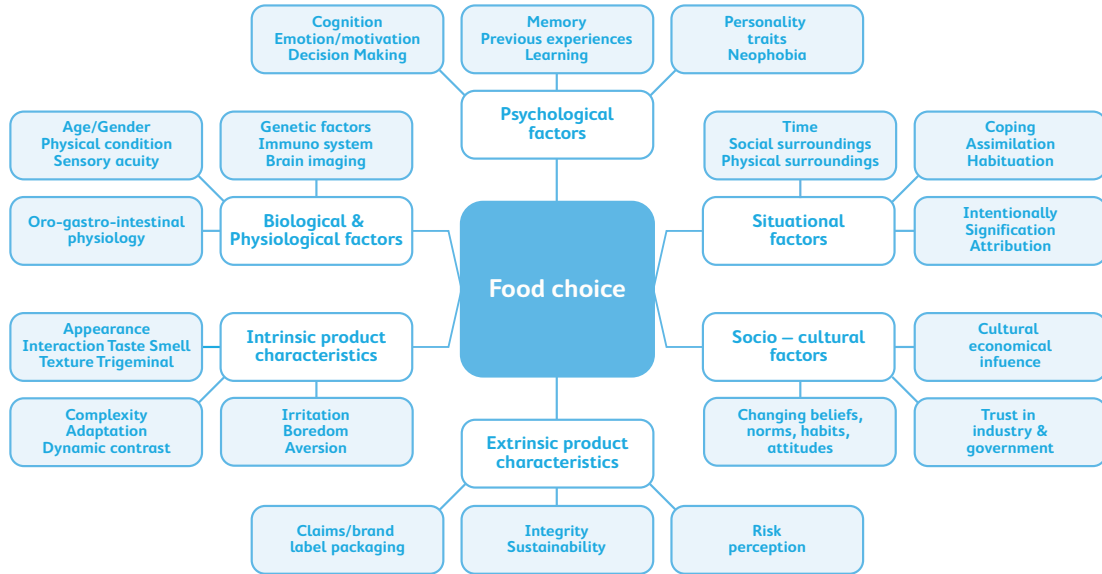
Nowadays, there is a trend for consumers wishing to know how the product was made and the ingredients which make up the product. Some production methods are perceived as less ‘natural’, such as freeze drying, while some food ingredients are perceived as ‘unhealthy’, for example, chemically produced flavours.

These perceptions have given rise to a so-called ‘clean label’ trend. Marketeers and product developers highlight product attributes like organic, ‘only natural’ ingredients and sustainable sourcing to drive the consumer perception of clean label.

### Approaching a definition

It has been suggested by Asioli et al<sup>1)</sup> that a definition of clean label should encompass a visual evaluation by consumers of the ‘cleanliness’ of a product from both the front and back of pack labels, by assumption and inference, as well as by closer inspection.

Although ‘healthiness’ is a major purchasing motive, there are many drivers which influence the perception of clean label. Both intrinsic properties, like nutrition, health-promoting and sensory attributes, and extrinsic characteristics, like sustainability, labels and certificates, and health claims can come into play.



Source: Adapted from Koster (2009)

**Implications for developers**

When designing ‘clean label’ products, account needs to be taken of socio-cultural factors. Work by Dubé showed Western consumers are turning away from buying products produced using advances in food and agricultural technologies in favour of purchasing natural and organic products, whereas, in developing countries, use of an industrialised food supply is indicative of better living standards.

New food products developed with claims of ‘free from’ artificial additives and/or ingredients tend to be positioned differently from organic and natural products. These differing positions can lead to a variety of different products.

The diagram shows all the influences involved when selecting a food product.

**Fear, uncertainty and doubt**

An article in Forbes in October 2017<sup>2)</sup> claimed that the clean label concept is based upon bad science and can trigger eating disorders. This statement was aimed at human foods, but I would assume, if true, is applicable to pet food as well. The theory is based upon the concept of FUD from the 1920’s. FUD stands for fear, uncertainty and doubt and is a disinformation strategy.

<sup>1)</sup> ncbi.nlm.nih.gov/pubmed/28784520  
<sup>2)</sup> bit.ly/2OB0E4H

As analytical procedures become more sensitive and it is possible to measure chemicals at the minute level, it is easy to say there is X, Y and Z in a product. If X happens to be arsenic, which is in soil, and hence will be found in vegetables, it is easy to say arsenic is found in say baby food. That is the headline and from there it is very difficult to argue the product is natural and causes no harm at the detected levels.

**Blockchain to the rescue?**

Blockchain, the software which underpins the cryptocurrency bitcoin, is a digitised, decentralised, public ledger of – in the case of bitcoin – all cryptocurrency transactions. Constantly growing as ‘completed’ blocks (the most recent transactions) are recorded and added to it in chronological order, it allows market participants to keep track of digital currency transactions without central recordkeeping.

The theory behind blockchain is starting to be used in the food industry with the aim of enabling the consumer to see full transparency in the sourcing of ingredients and production methods of the final product. Use of this technology may overcome some of the issues described in the article in Forbes Magazine. ♦



**John Adams**  
 Pet food consultant  
 jaadams@msn.com

## Lintbells UNITED KINGDOM

### Sourcing with integrity

Lintbells sustainably sources the highest-quality ingredients from all over the world to make sure it offers the highest-quality supplements possible.

For example, the main ingredient in the YuMOVE® range, ActivEase® Green Lipped Mussel, is obtained from the clear coastal waters of New Zealand. Lintbells works only with specially selected farms that meet its high standards both in efficacy and ethics.

The oils used in the YuMEGA® range include fish oil sourced from Norwegian farms with stringent ethical values, and seed oils (borage, sunflower and flaxseed) grown, harvested, pressed and packaged in Staffordshire – just a couple of hours down the road from the Lintbells headquarters in the Hertfordshire countryside.

The all-natural supplements are helping to improve pets' lives around the world, and Lintbells is committed to look after the environment in return.

**Lintbells Ltd**  
info@lintbells.com  
lintbells.com



## Shandong Luscious Pet Food CHINA

### Professional producer of pet food since 1998

As a professional pet food supplier, the company is mainly focused on wholesale pet food/snacks for dogs and cats, such as meat-based dog snacks, dental dog chews, dog biscuits and canned food for dogs and cats.

**OEM orders welcome**

**Shandong Luscious Pet Food Co., Ltd.**  
xincheng@chinaluscious.com  
chinaluscious.com

## Golden Eagle Pet- foods UNITED KINGDOM

### Golden Eagle Fresh Meat

Golden Eagle Fresh Meat is a clean and complete food for adult dogs needing an extra boost from fresh meat with a high protein content. It is a grain-free hypoallergenic diet with natural ingredients. No E-numbers!

3 different tastes: **Farm Formula 35/18** – Duck and Turkey, **Ocean Formula 33/16** – Salmon, Herring and Trout, **Wild Formula 34/17** – Venison, Herring and Rabbit.

The pet food range contains multi-protein, single protein and grain-free ingredients.

**Golden Eagle Petfoods Co. Ltd**  
info@goldeneaglepetfoods.com  
goldeneaglepetfoods.com





**Yantai China Pet Foods CHINA**  
**For a healthy pet food industry**

Yantai China Pet Foods aims to promote healthy development of the pet food industry. In its ten modern pet product-processing factories, the company manufactures product lines that include pet snacks, dry and wet pet food, dog biscuits and cat litter. The brand is currently available in over 60 countries.

**Yantai China Pet Foods Co., Ltd.**  
 wanpy@wanpy.com.cn  
 wanpy.com.cn

FREEZE -DRIED  
 Chicken & Fruits  
 KIWIFRUIT, APPLE & CRANBERRY



FREEZE -DRIED  
 Chicken Breast



**Nature's Protection LITHUANIA**  
**The mystery of discoloured black hair solved**

Nature's Protection have developed, especially for black-haired dogs, a new super-premium dry food that increases the levels of the amino acids L-phenylalanine and tyrosine in blood plasma, which has an impact on the incorporation of the dark-skin pigment melanin into the hair shaft. Tests showed that the majority of black-coated dogs recovered from discolouration.

**AKVATERA Ltd**  
 info@naturesprotection.eu  
 naturesprotection.eu



**Duynie Ingredients THE NETHERLANDS**  
**Sustainable ingredients**

Duynie Ingredients provides responsible, sustainable and healthy ingredients of natural origin to the petfood industry. All our ingredients are entirely traceable and meeting pets' nutritional needs. Ingredients are sustainably sourced, produced and supplied.

- Natural raw materials (potatoes, sugar beet, chicory roots, corn, fruit, vegetables) directly sourced from the food industry
- Optimal usage of the grown crops
- Heating and electricity from sustainable energy sources are used in production process

**Duynie Ingredients B.V.**  
 info@duynie-ingredients.com  
 duynie-ingredients.com



**Manitoba ITALY**  
**New products for rabbits and parrots at CIPS 2018**

Manitoba, producer of food for birds and small animals, welcomes you to the Italian pavilion during CIPS 2018, where the company will present the following new products:

- Dolce Forno Grow and Energy powder for young parrots;
- Monello Pellet Pro and Monello Carrot, completing the range of mueslis and extruded products for rabbits.

**Manitoba Srl**  
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## Aqua One CHINA Aqua One LifeStyle Aquariums

The Aqua One LifeStyle range delivers style, versatility and functionality with ease of use ensuring a successful first experience in fish keeping. The LifeStyle-matching Cabinet range offers a strong and stylish design with storage space for aquarium equipment. The LifeStyle aquariums are equipped with LED lighting, a hinged lid and a filter to keep the water clean.

Aqua One China Co Limited  
sales@aquaoone.com.hk  
aquaoone.com.hk

## KW Aquatic Supplies CHINA PC water pump with compact design & larger flow

The Dolphin PC water pump has an elegant design while maintaining high output. There are 6 models available: from 500L/H till 5000L/H.

The features are as follows:

- Compact design with powerful flow rates
- Adjustable flow control
- Easy handling for placement
- Includes coarse sponge for filtering and blocked debris
- For use in marine water & fresh water.

OEMs welcome

KW Aquatic Supplies Co., Ltd.  
cyh@kw-zone.com  
kwzone.com



Adjustable flow control



Aveflor CZECH REPUBLIC

# Observing the natural balance

High quality veterinary spray products since 1995.

## The company

Aveflor is a family-owned company founded in 1995. Since its establishment, it has been exclusively a Czech company without the presence of foreign capital.

The company was established to produce high quality spray products. The aim was primarily to produce veterinary, medical and cosmetic products. In 1997, the company rebuilt the building of the former school in the village of Budčevés into a production plant. The building also houses so-called clean rooms and the company headquarters.

## Green thinking

The company's main priority is the production of high-quality products, both under its own brands and for its contractual partners. Among its well-known and well-established brands are Arpalit, Kubatol and Kerolan.

The products are developed in their own laboratories with an emphasis on quality

and modern knowledge. The company strives to make use of the beneficial effects of natural substances and herbs in its products. Wherever possible, natural substances are preferred over artificially manufactured substances.

## Certificates

Management strives for a lasting mutual trust between the company and its partners, as well as the feeling of joint responsibility of all employees for the quality of products. For this purpose, the company has implemented an integrated quality management system and has the necessary permits to manufacture veterinary drugs.

## Over the border

Aveflor offers its own products and services in the form of contractual performance to more than 20 countries in Europe, the Middle East, Asia and North America. About 65% of total production is exported, with countries cooperating with major business partners. Each customer

is treated with individual care and the company offers a comprehensive service, from the development of new products, their certification and the purchase of raw materials and packaging materials, to the production and delivery to the customer.

## Philosophy

The philosophy of the Aveflor family company is based on respect for natural laws that govern everything that happens around us. The law of the balance between giving and taking is considered as crucial. The adopted vision, which can be expressed by the motto 'Satisfied customer - a prerequisite for prosperity', reflects this balance - providing quality products and services leads to a satisfied customer. If the customer is not satisfied, Aveflor will always offer an adequate alternative solution. ♦

♦ **Aveflor, a.s.**  
aveflor@aveflor.cz  
aveflor.eu



# Coming clean

## Clean label is more than just a buzzword. What are the trends and opportunities in the US pet food market?

### Why mass premiumisation?

For the first time in years, general mass-market stores such as Walmart appear poised to surpass pet specialty stores in pet food sales growth in the US market. It is not just a coincidence that this switch coincides with the mass premiumisation of pet food products, that is, the emphasis on more natural-positioned pet food brands and formulations in mass-market channels. Factoring in to this trend are the cross-overs of pet specialty brands into mass channels, and conversely the entrance of new superpremium-type brands such as Mars' CRAVE

designed specifically for mass retailers joining established superpremium-type mass-market brands.

It is also not just a coincidence that General Mills, Mars, and others are names primarily associated with the human food market: mass premiumisation in the pet food market is inextricably linked to the natural product trends reshaping the packaged food industry in general. That is why clean label has become an increasingly important concept for pet food product innovation and sales growth goals.

**Clean labelling: more than a buzzword**

No strict definition of ‘clean label’ exists, but the guiding principle is that processed foods should be free of any ingredients that consumers consider undesirable. Free of artificial ingredients is the basic criterion, but that is just entry-level clean label. For example, fully half (50%) of dog and cat owners believe that natural/organic brand pet products are often better than standard national brand products, according to Packaged Facts’ Q1 2018 National Pet Owner Survey. And that perception is at least partly safety-driven.

Many of the largest pet food and treat recalls have involved imported ingredients, so it makes sense that ‘Made in the US’ ties directly into natural and clean label. In Packaged Facts’ Q3 2017 National Pet Owner Survey, ‘Made in the US’ was the top product positioning draw among dog and cat owners, at 32% and 31%, respectively, followed by natural/clean label claims such as grain-free, 100% natural, limited ingredient, and organic.

Top draws for selected product claims among dog and cat food purchasers, 2017 (percent)		
Claim	Dog owners	Cat owners
Made in the US	32	31
Grain-free	23	15
100% Natural (other than organic)	16	12
Limited ingredient	10	6
Organic	8	6

Source: Packaged Facts, Q3 2017 National Pet Owner Survey

This product safety angle shows why clean label will remain much more than an industry buzzword. Clean label blends into product transparency, which goes beyond ingredient lists to sourcing, labour, food production, and product distribution practices. Clean label will be especially effective in appealing to millennials and the rising Gen Z generation, who tend to place a higher priority on product and corporate transparency, because they expect the products they purchase to reflect their own values.

**Animal welfare linked to safety issues**

With cause marketing deeply rooted in the pet industry, Packaged Facts expects newer initiatives to push the boundaries, again tracking trends on the human side. Foremost among these will be animal welfare.

At least at the superpremium pet food level, competition from products marketed on animal-welfare attributes is destined to increase. Food companies at all points along the supply chain – from growers and ranchers to manufacturers and foodservice operators – have increased their commitments to actions that promote animal welfare; although many companies have opted for setting 100% goals well into the next decade, recognising that it will take time to accommodate rising consumer expectations and demands. For the human and pet food industries alike, animal welfare aligns with other top-of-mind food trends, concerns, and priorities.

Consumers increasingly link livestock animal welfare issues to the safety of meat, poultry, and dairy products. Packaged Facts survey data show that 45% of those who buy cage-free, free-range, or pasture-raised chicken consider it more likely to be contamination-free, as do 40% of those who buy grass-fed/pasture-raised beef.

▶ SEE NEXT PAGE

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Shouguang City (South of Zhongxin Road, East  
of Chuanbo Road), Shandong, China



Consumers also increasingly link livestock animal welfare issues to improved nutrition such as healthier fats in grass-fed beef, and to broader sustainability concerns including carbon footprint, optimum use of land, and local sourcing and labour markets.

### Acquisitions trend

The stage is therefore set for more acquisitions of niche animal protein companies with progressive animal welfare-related practices and reputations.

As Packaged Facts senior pet market analyst David Lummis predicts in US Pet Market Outlook 2018-2019, institutional investors will increasingly be attracted to companies ahead of the curve in animal welfare practices as an emerging front in clean label and product transparency.

‘Product appeals such as natural, grain-free, and novel ingredient are powerful,’ observes Lummis, ‘but it is not hard to imagine a future in which differentiating products is no longer enough, meaning marketers will increasingly need to differentiate themselves.’ ♦



**David Sprinkle**  
Research Director and Publisher  
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packagedfacts.com

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# Your pet deserves a better life



## Providing pets with the highest standard of nutritional products.

### Mission and values

Founded by Mr. Chen Zhenbiao in 2002, Petpal Pet Nutrition Technology Co., Ltd (300673.SZ) is a family firm based in Wenzhou, China. As a new high-tech enterprise, the company is principally engaged in the research, development and sales of nutritional, hygienical, and functional pet products. Petpal aims to create a harmonious coexistence between human beings and pets, by providing nutritionally balanced pet food and interesting pet supplies to strengthen their relationship. As a leading pet products supplier in China, Petpal always adheres to the value of 'integrity, innovation, development' and all products are in strict accordance with International Food Regulations.

### Products and brands

The main products of Petpal are rawhide chews, plant chews, meat snacks, birdie treats, biscuits, and edible small animal toys, et cetera. As an innovation guardian,

the company continually utilises new technologies to create inventive pet products. Up to now, there are 107 staff in Petpal's R&D, which is responsible for technology innovation, technology promotion and new products research and development. Petpal now holds 30 patents, including 9 patents of invention.

Petpal has already established long-term cooperation with many well-known pet products brand owners, pet specialty stores, and supermarkets all over the world. After years of development, the company has built some self-owned brands, such as CPET, MEATWAY, PEIDI, Health Guard, et cetera, which have won good comments from domestic and international pet owners.

### Awarded

Petpal was recognised as a 'China Quality Trustworthy Organisation' in 2010 and was appointed to draft the national standard for Dog Chews Manufacture.

The CPET brand was awarded 'China Famous Trademark' status by the State Administration of Industry and Commerce in 2013.

### Future outlook

Petpal is committed to be the innovative and international comprehensive pet foods supplier. To strengthen the competitive power of its brands at home and abroad, the company will continuously improve its self-innovation ability and further enlarge the scale of enterprise to realise its sustainable development in future. Petpal will continue to do what it does best to provide pets with the highest standard of nutritional products and help pets to live a better life. ◆

◆ **Petpal Pet Nutrition Technology Co., Ltd.**  
cpet@peidibrand.com  
peidibrand.com

Mediterranean gourmet

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*They call us crazy.  
We say thank you.*

[gosbi.com](http://gosbi.com)



## Growing EU-international trade in pet food

European pet food manufacturers increasingly have to look to geographic expansion for growth. At the recent FEDIAF AGM, panellists discussed the challenges.



### Focus on trade

During the Annual General Meeting in June in Rotterdam of FEDIAF – the trade body representing the European pet food industry – international trade was the focus of a panel discussion, including representatives of the WTO, European Commission, GAPFA and the Dutch Ministry of Agriculture, as well as FEDIAF.

International trade represents a substantial proportion of GDP for many European countries. In 2017, EU pet food exports amounted to some €1.2 billion (\$1.36 billion), while imports into the EU reached a value of €330 million (\$374 million). With growing competition and more mature markets within the EU, pet food manufacturers have to look to geographic expansion to ensure sustainable growth.

### The EU as one trading block

To export to a third country there must either be an agreement between the EU and the third country, or bilateral agreements between individual Member States and the third country.



FEDIAF clearly favours the former: in all 28 EU Member States, the same hygiene rules apply and there should be no reason why a pet food from France is allowed to be exported to country X, but not a pet food from Italy or Poland.

According to Elzo Kannekens from the Dutch Ministry of Agriculture, the key to facilitating trade is transparency and trust: to have the EU seen as a single trading block, there must be trust in the safety systems throughout the EU; equally important is the trust in the individual official veterinarians involved in international trade.

### Zoonosis as an export barrier

An outbreak of African swine fever or avian influenza is often used to close borders for animal products, including pet food. "To build trust, we need to demonstrate to our trading partners that the EU has things under control," commented Matjaz Klemencic from the Commission. Application of health standards and risk mitigation adopted by the World Organisation of Animal Health are equally key.

### E-commerce and compliance

With 68% of internet users in the EU having shopped online in 2017, according to Eurostat, e-commerce is a reality for businesses. Compliance, however, is a real challenge. A consumer can order any product online from anywhere in the world and have it delivered to their home. The product purchased is hardly ever checked. How confident can a consumer be that the product they have bought is authentic, safe and in line with European laws and regulations?

"E-commerce is not the problem, it is the control," commented Diwakar Dixit from the WTO. Educating the consumer and building awareness was seen by the panellists as the most appropriate way forward to reduce the risks of e-commerce.

### BREXIT

"The UK pet food industry did not want Brexit and our stated policy is to stay as aligned with Europe as closely as we can," underlined Tony Parkinson, Chairman of the UK Pet Food Manufacturers Association (PFMA).

For all industries, including the pet food industry, BREXIT is an unprecedented issue with a very uncertain outcome. FEDIAF works on maintaining the free movement of pet food, raw materials and packaging and will continue to do so after the UK leaves the EU. Tariffs should be avoided as well as any future discrepancies in veterinary or other feed legislation, for example, related to labelling, safety or additives. ♦

For the latest facts and figures on the European pet food market including pet populations, please visit: [www.fediaf.org](http://www.fediaf.org)



**Thomas Meyer**  
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**SERIOUSLY  
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**Your partner  
for innovative,  
natural  
snacks**



**A one-stop shop delivering excellent quality, innovative snacks and food for cats and dogs, rodents and birds.**

### **Deep roots**

Holland Diervoeders has deep and extensive roots in the production of feed for birds, pigeons, rodents, ferrets, poultry and tropical birds. Well known for offering supreme quality, the company possesses extensive expertise, including its own nutritionists, housed in a dedicated R&D department.

Its own portfolio of established brands, Puik, Sluis and Teurlings, as well as Nature&Science and Voskes, delivers excellent value for a wide range of customer types and price positions. In addition, the company has long distributed a wide range of other premium brands to retailers, wholesalers and pet shops, as well as providing marketing and sales expertise, innovation and private label services to customers.



In short, it is a one-stop shop for excellent quality pet feed products and services.

### Quality, service and knowhow

Quality, service and product knowledge run deep in both the company and its employees. A unique strength of Holland Diervoeders is that it has its own trading organisation that takes care of sourcing all ingredients and raw materials. In fact, it is one of the few in the mixed feed sector to control and manage the entire supply chain itself.

State of the art production and storage facilities are flexible and able to respond quickly to customer needs, with a total production capacity of 60,000 tons a year of end products, all subject to the company's rigorous Quality Assurance System.

A sales and marketing department completes the offering, with a dedicated team of experts able to deliver customised product design and

branding services, through packaging, comprehensive category management and overall brand management.

It is this complete oversight and attention to detail that ensures that the company can deliver consistently outstanding products and service to customers. As Mr. Jan-Willem de Sain says: "We offer a complete and extensive range of snacks, which meets the individual wishes of the consumer."

### Part of Group Depré

Formed in 1983 but with business roots dating back to 1803, Holland Diervoeders was acquired by Belgian Group Depré in 2011 and, as of Interzoo 2018, is branded as a member of Group Depré, while keeping its own name. Among the benefits of the merger is that the company has access to, and participates in, an increasing exchange of knowledge and experience between the various divisions.

It now supplies the entire Group Depré range to retailers and pet shops, including pet food and snacks for dogs and cats, and is committed to helping retailers access and benefit from the expertise of Group Depré export managers in the respective geographic areas and the group knowhow in general.

Being a member of Groupe Depré also enables Holland Diervoeders to accelerate the development of new products, such as a range of

delicatessen snacks. Group Depré numbers 400 employees and turnover totals around €450 million (\$509 million).

### At the forefront of trends

Customers around the world, including in Asia, are looking for natural snack products that are as fresh as possible, anti-allergen and with little or no additives. The company delivers on this with cooked and oven-baked products and an easy cup-based dosing system, so the customer can keep their hands clean. Packaging of the snacks is as sustainable as possible, recognising that the packaging also has to protect the product.

Millennials, as a consumer group, latch on to new ideas quickly and pay close attention to detail, meaning the market is continuously on the move, trends follow each other faster than ever before. Holland Diervoeders prides itself on its ability to respond and stay at the forefront of market developments. The pet food market is influenced by advances in the human food market and among those, track and traceability is becoming increasingly important also for pet food and snacks. ♦

- ♦ **Holland Diervoeders B.V.**  
info@hollanddiervoeders.nl  
hollanddiervoeders.nl



営業宣言  
いちば、パソコン・ビデオの  
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Billboard featuring a group of young women in school uniforms, likely an advertisement for a retail or entertainment business.

サイバーパンク (Cyberpunk) vertical sign with a large character graphic.

買取り (Buyback)  
まっす (Matsu)

アキバ (Akihabara)

秋葉原ホビー天国 (Akihabara Hobby Paradise)

HOBBY PARADISE

ポークス (Porks)

季節 洗濯機 調理美容健康 (Seasonal Washers, Cooking, Beauty, Health)

LAOX

Duty Free

免税 (Tax Free) 見せ値 (Display Price)

LAOX Home Electric

LAOX YAMABARA MAIN STORE

オノデン (Onoden)

Large advertisement for Onoden featuring a washing machine and text: 都内近郊 (Metropolitan area), 冷蔵庫洗濯機 (Refrigerator washer/dryer), 免税半額 (50% tax-free), DUTY FREE B1F.

TAX FREE 免税店 特売 (Tax Free Duty-Free Store Special Sale)

ONODEN

Advertisement for Onoden featuring a character and text: 大特売中 (Big Special Sale), 冷蔵庫洗濯機 (Refrigerator washer/dryer), 迎 (Welcome), LABARA.

ONODEN LABARA



## Southeast Asia

What are the main growth drivers in the Chinese market? How to benefit from this growth and export pet food to China? The spotlight is on Oceania as well as Japan.

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# Main trends in China



**Various financial, demographic and social factors are driving pet industry growth.**

## **Growth market**

China is still a booming economy, with a growing middle class. The nation's people living busy lives. As a form of emotional attachment to balance their hectic lifestyles, many consumers like to keep a pet. At the end of 2017, there were over 87 million dogs and cats in China and the pet industry is developing rapidly; with a market value of RMB 134 billion (€17 / \$19 billion) and with further expected growth of 40% within three years, China's pet industry is around the same size as sectors such as tourism, education and sports.

## **Ongoing M&A activity**

To benefit from the strong growing pet market, the existing companies need to expand rapidly. They need a source of finance to fund their growth, which is why there is ongoing merger and acquisition (M&A) in the Chinese pet industry.

According to CV Source, there were seventeen mergers and acquisitions in 2017 as well as a couple of major funding transactions. A few of them are listed in the table.



Company name	Amount in RMB	Amount in \$
Reipeng Pet Hospital	246 million	38.9 million
Ringpai National Chain Veterinary Hospital	245 million	38.8 million
Kohlberg Kravis Roberts & Co. L.P invested in Gambol Pet Group	400 million	63.4 million
Epet.com, an online retailer	315.5 million	50 million

Besides these M&As, Wenzhou Peidi Pet Products Co., Ltd. as well as Yantai China Pet Foods Co., Ltd. were listed on the stock exchange. This trend is continuing in 2018. So far this year, deals with in a total value of RMB 120 million (€15 / \$17 million) have been concluded in areas including pet disease diagnosis technology, pet retail chains and pet medical insurance.

### Win-win situation

According to Mr. Li, Vice-President of CITIC Securities, the capital market is paying closer attention to pet industry because the level of consumption has increased as the per capita income has grown. Due to factors such as urbanisation and the aging population, the pet industry has become an interesting industry for investors. With the abundance of social capital, investors and companies seeking funding can help each other forward, promoting industrial development and creating a win-win situation.

### New entrance

The booming pet industry is attracting new entrants from other industries too. One example is Fuhua Industry, an industrial investment company that created the first Ecological Indoor Zoo which offers an immersive pet experience.

Kakazoo has already opened flagship stores in Huhehaote and Baotou, two cities in Inner Mongolia, and more flagship stores will be opened in Qingdao, Chongqing, Hangzhou, Suzhou, Changchun and Nanjing. By the end of 2020, there will be 15 flagship stores across China. With various themed interiors, Kakazoo is a wonderland for all animal lovers, giving people the opportunity to interact with their future pets by touching and feeding them.

### Nekonomics

In 2015, a Japanese economist came up with the word 'Nekonomics' to describe the cat economy created by consumer interest in cats and cat-related products. Nekonomics is now playing a growing role in the Chinese economy too, and in addition to products concepts such as cat cafés and cloud cat petting, cat-themed emojis are becoming more and more popular in China. In fact, China is now the second-largest cat country in the world with over 58 million cats.

The main reasons for the popularity of cats in China are:

- Single people prefer to have a cat above family
- Having a cat takes less effort than owning a dog: cats take care of themselves pretty well and they don't need to be walked/bathed
- Cats eat less than dogs, and hence they cost less. ♦



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# Entering the Chinese pet market

## How can Western manufacturers capitalise on China's fast-growing pet industry?

### Size versus growth

In terms of size, the US is currently the world's biggest pet market, followed by Europe. Whereas in the US two-thirds of the population own a pet, in China that figure still stands at just 0.07%. But with the rapidly improving welfare level in China, especially among the middle class, this percentage is rising quickly, making it the fastest-growing market in the world. At this moment there is a concentration of pet owners in coastal cities, characterised by a high consumption level. Further growth of the pet market can be expected, not only in these coastal cities but also in the fast-growing inland cities. Furthermore, pet owners are mainly concentrated in age groups born in the post-80s and 90s.

### Perception that 'West is best'

Although China has its own important pet food and pet snack manufacturers, many Chinese consumers prefer Western brands. Why? Because they believe that those brands have a higher constant quality



level. This makes China a potentially interesting export market for Western manufacturers – but exporting to China is not easy.

### How to export pet food to China?

To export its brands to China, a Western manufacturer has to complete two registration processes, as explained below:

- **Step 1**

Firstly, the products must be registered with the Chinese Ministry of Agriculture (MOA). According to the 'Administrative measures for the registration of imported feed and feed additives', overseas enterprises must apply for import registration with the MOA and obtain a registered licence for the products before they export feed or feed additives to China for the first time. Overseas enterprises must also entrust one domestic agent to handle the import registration application.

- **Step 2**

Secondly, each manufacturer must be registered. According to the 'Administrative measures of inspection, quarantine and supervision on import and export of feed and feed additives', the Chinese government implements a registration system for overseas manufacturers from approved countries or regions for exporting feed or feed additives to China. Feed can only be imported from registered overseas manufacturers. The General Administration of Quality Supervision, Inspection and Quarantine (AQSIQ) was previously responsible for the registration of manufacturers. However, the General Administration of Customs, PRC (GACC) has now taken over this responsibility following institutional integration earlier this year.

According to Chinese regulations, pet food is also classified as feed in China, so the above requirements apply to all imported pet food. Both registration requirements must be met in order for the products to gain customs clearance.

### Different requirements

The two registration processes are different from each other. The product registration with the MOA includes a review of the application documents and verification testing of samples. The manufacturer registration includes governmental correspondence, such as a recommendation from a local competent authority and the involvement of the embassy.

Ideally, manufacturers of Western brands should find a qualified and experienced domestic agent to help them. The Feed China Registered License Center can provide assistance with this. ♦



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# Pets in Oceania

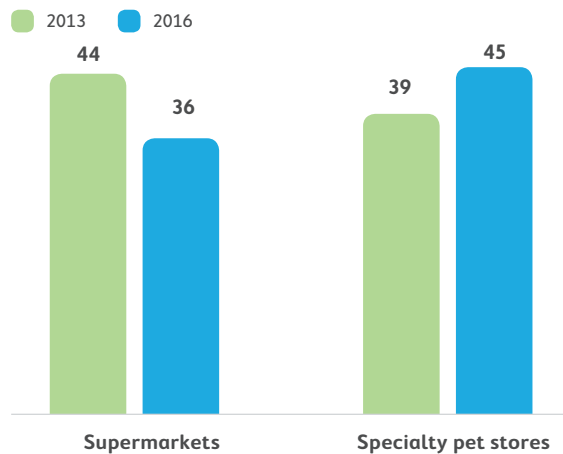
Oceania has a robust pet market, mainly thanks to Australia and New Zealand.

## Geography

Oceania is a geographic region comprising Melanesia, Micronesia, Polynesia and Australasia. Spanning both the eastern and western hemispheres, Oceania covers an area of 8,525,989 square kilometres and has a total population of 40 million.

Country	Population
Australia	24,772,247
Papua New Guinea	8,418,346
New Zealand	4,749,598
Fiji	912,241
Solomon Islands	623,281
Vanuatu	282,117
Samoa	197,695
Kiribati	118,414
Tonga	109,008
Micronesia	106,227
Marshall Islands	53,167
Palau	21,964
Nauru	11,312
Tuvalu	11,287

## Primary sources of pet products and accessories (%) – change over time



Base: 2016: Pet owners, n=1,234. 2013: Pet owners, n=1,089

## Smaller islands

On the islands that have a population of less than a million, the demand for pet products is small. Rather than having pet shops, they are more likely to have mixed businesses such as produce stores, general food and hardware stores and small supermarkets selling a limited range of pet products and pet food. The indigenous people on these islands tend to have ‘village pets’ that are fed on scraps.

**Australian pet owners are more likely to be**

(% OF EACH SEGMENT WHO CURRENTLY OWN A PET)

64%	Female
72%	Generation Y, 18-29 years
64%	Generation X, 30-49 years
66%	Working part-time
65%	Working full-time
68%	Earning middle to higher incomes (\$70,000 to \$100,000)
68%	Living in a freestanding home
65%	Homeowners
74%	Living in larger households i.e. living in a household with three or more adults
73%	Living in a household with children
72%	Living in a de-facto relationship
64%	From an English-speaking background

**Non-pet owners are more likely to be**

(% OF EACH SEGMENT WHO CURRENTLY OWN A PET)

44%	Male
45%	Silent Generation – 70 years or older
46%	Not currently working
45%	Living in households with an income of less than \$30,000
59%	Living in apartments
49%	Living in a townhouse
44%	Renters
52%	Living alone
49%	Living in households where there is only one adult
48%	Separated, divorced or widowed
42%	Living in households where there are no children
49%	From a non-English-speaking background

**Base:** 2016: Total sample, n=2,022; **Q:** Thinking now about pets. Which of these pets, if any, do you have in your household? **Note:** Reptiles include snakes, turtles/tortoises, lizards and frogs/salamanders. Small mammals include rabbits, guinea pigs, ferrets and mice/rats.

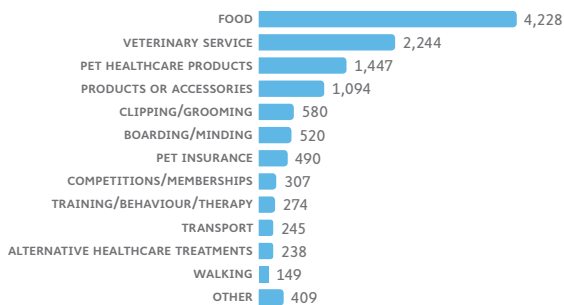
**Papua New Guinea**

With a population of over eight million, of which 95% are indigenous, Papua New Guinea is not a large pet market. The RSPCA in Port Moresby is the only private vet in the country and sells pet products through the clinic. There are no pet shops. Supermarkets sell some products but there is often a shortage due to the lack of foreign exchange to pay for products.

**New Zealand**

Despite having a population of just 4.7 million, New Zealand has a robust pet market.

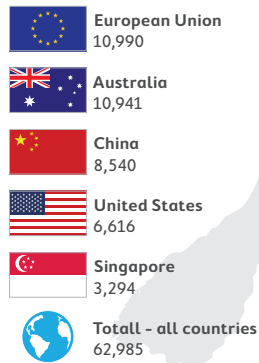
**Total expenditure by category (AU\$ million)**



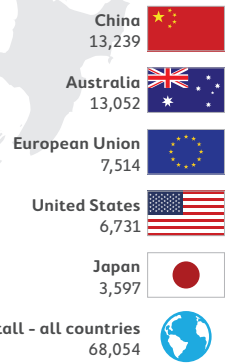
**Base:** Dog owners, n=763; Cat owners, n=585; Fish owners, n=237; Bird owners, n=226; Reptile owners, n=53; Small mammal owners, n=61; **Q:** Approximately how much has been spent on each of these items in the past year for your dog(s)/cat(s)/fish/bird(s)/reptile(s)/small mammal(s)?

**Main trading partners New Zealand, 2014**

Imports - Goods and services (\$ million)



Exports - Goods and services (\$ million)



In June 2016, the New Zealand Companion Animal Council (NZCAC) released its second 'Companion Animals in New Zealand' report, which revealed that 64% of the country's households own at least one pet, amounting to 4.6 million pets in total: 1.1 million cats, 0.7 million dogs, 1.5 million fish and 0.6 million birds. Down slightly from 68% in 2011, this fall can largely be attributed to a 4% decline in households that own cats, although cats remain the most popular household pets in the country overall.

**Australia**

Almost two in five Australian households have dogs (38%) and nearly three in ten households have cats (29%), with an average of 1.3 dogs and 1.4 cats per household. More than one in ten households also keep fish (12%), with an average of eight fish per household. A similar proportion of households keep birds (12%), with an average of 3.9 birds per household. For the first time in 2016, this NZ study also examined small mammals and reptiles as pets (separating them out from the 'other pets' category used in 2013) and found similar rates of ownership of each (both 3%). The average number of small mammals per household is 1.9, and that for reptiles is 1.7. A similar proportion of households (3%) said they own another type of pet, with examples including horses, goats, sheep and hermit crabs. ♦



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## Japanese pet market

Cats have overtaken dogs but the market value remains stable.

### Financials

Since 2015, when the country's population of dogs and cats reached 9.4 million and 9.3 million respectively, Japan's pet market value has been stable at around JPY 1.4 trillion (€10.8 billion / \$12.6 billion). The total market value is expected to remain stable in 2018.

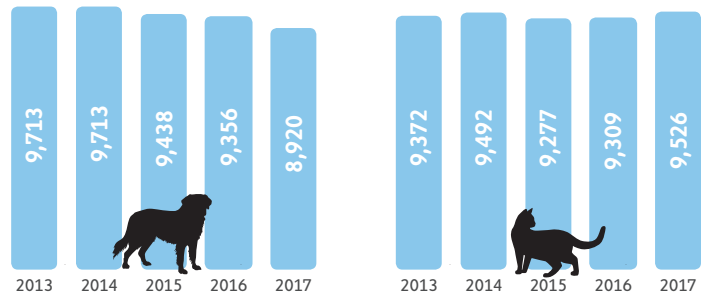
### Dogs in decline

While the overall dog population has continued its downward trend, the cat population exceeded the dog population in 2017. The popularity of cats over dogs in Japan reflects demographic changes, such as the increasing ageing population and single-person households where cats are preferred due to requiring less care and expense compared to dogs.



## Pet ownership

Number of households with cat or dog (x1,000)



Source: Pet Page INC

decreasing, the turnover in dog accessories is slightly increasing, currently standing at around JPY 9 billion (€6 million / \$7 million). This implies that small dogs are more likely to be pampered; they tend to be owned by 'pet parents' who are willing to do anything for their beloved dogs and who like to buy high-quality products.

## Main drivers in the Japanese market

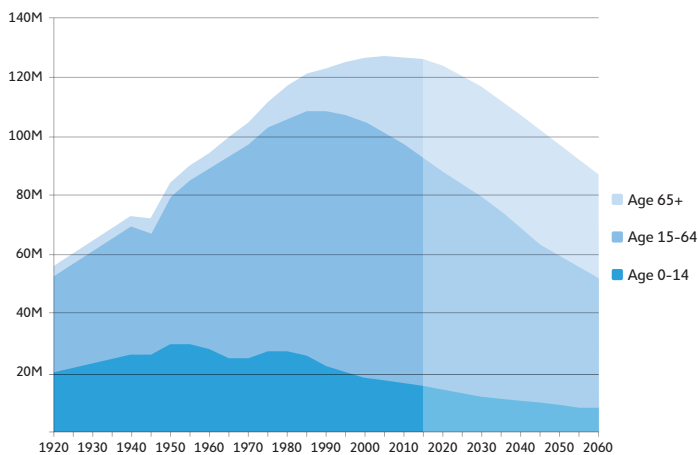
### 1. Popularity of smaller dogs

Small dogs have been gaining popularity in Japan. Dogs weighing 10kg or less accounted for 67.8% of Japan's total domestic dog population in 2015. Of those, ultra-small dogs weighing 3kg or less totalled 13.4% and small dogs at between 3kg and 5kg numbered 25.1%. Although the number of dogs is

### 2. Advanced ageing among pets

Dogs over seven years old accounted for 56.8% of Japan's total domestic dog population in 2015, while cats over seven years old equalled 44.4%. The average lifespan for dogs in Japan is 14.2 years while the average lifespan for cats is 15 years. Due to the wide availability of well-balanced pet foods as well as advanced pet medical care, pets are living longer. In that respect Japanese pets are mirroring the development of the country's human population. Due to its ageing population, Japan is regarded as the world's oldest society and the country is said to have the highest proportion of elderly citizens, both in rural areas and urban ones.

## Development of the population x million



Source: Pet Page INC

### Indoor pets

Another trend is the increase in indoor pets. A survey by the Japan Pet Food Association showed that over 78.9% of dogs and over 82% of cats are kept indoors. Pets kept indoors are less likely to become ill and therefore live longer. Hence, this trend is also a factor driving advanced aging among pets in Japan. ♦



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