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## GPF Europe 2021

The most popular  
networking event of 2021.

## Food and Ingredients

Prebiotics, wet and raw food  
and their health claims.

## Poland and Russia

These vast markets  
are changing rapidly.



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GlobalPETS Forum  
20-22 January 2021  
See page 42

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## Highlights this issue



10

### Food and Ingredients

Health is on the foreground now more than ever. Pet owners try to ensure their pets stay healthy in numerous ways. The pet industry is more than happy to contribute.



30

### Accessories

Accessories not only have to be functional and good-looking, but also have to fit the lifestyles of pet owners and answer their concerns. Innovative novelties are applied to ensure the health, safety and well-being of pets.



42

### GPF Europe 2021

The most popular yearly network event for pet industry professionals is coming closer. Themed 'Exclusive brands' it will show how a new movement of premiumised private labels is on the rise.



55

### Poland and Russia

COVID-19 is accelerating the existing trend of online shopping, and pet owners want to have the best products, increasingly produced locally. These large markets are up for a change.

## And further in this issue

Editorial .....	3	Calendar of events   Contact us .....	63
Upcoming issue .....	5	Advertisers index .....	64
Pet industry highlights .....	7	Colophon .....	64

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# Pet industry showing economic resilience once again

Although life has gradually started to return to 'normal', it is still far from what we are used to. With exhibitions cancelled for the rest of the year, digital events are popping up, but we have a lot to learn to make them effective. Personally, I think they will never replace the 'quality' of face-to-face meetings.

The pet industry as a whole is flourishing as never before. And digital platforms are benefitting most of us. But it has become obvious that many brick-and-mortar retailers were not ready to benefit from the transformation to online shopping.

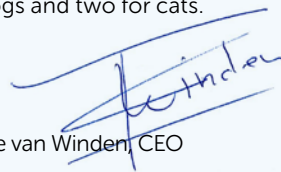
While the pet industry is soaring in many countries, the opposite is true for Russia. Nearly 83% of Russian pet stores saw a drop in turnover, caused by coronavirus and devaluation of the rouble. There are growth opportunities too. Read the article on page 60.

PETS International and Yummypets recently conducted a survey into the shopping behaviour of US and Canadian pet parents. There are clearly big differences between the two countries. Find out more on page 32.

The global wearables market has serious growth potential for the coming years. This is most likely to be achieved with Track & Trace products and IoT solutions. It is in the spotlight on page 40.

In this issue, we also look at wet pet food, particularly for cats. Wet food is good for their well-being, providing the water they need and with less calories than dry food. It is best to find the right balance between the two.

Until recently, antibiotics were used to limit the proliferation of potentially harmful bacteria. We now know that antibiotics destroy many useful bacteria too. Two of the ways to modulate these microbiota are prebiotics and probiotics. There is plenty of scientific literature on their benefits in humans, fish, chickens and pigs, but much less on dogs and cats. EU regulation and patent protections limit the use of probiotics in pet nutrition in Europe, with only three EU-approved probiotic strains for dogs and two for cats.



Corine van Winden, CEO



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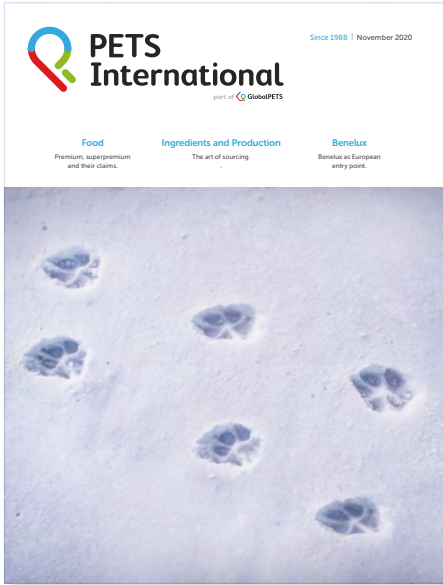
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# Accessories

Technology in accessories

Internet of Things

Augmented Reality

# Food and Ingredients

Superpremium pet food

Premiumisation

Art of sourcing

Claims of premium pet food

Novel health ingredients

# Benelux

Benelux as European entry point

November issue | Advertising deadline: 23 October 2020 | Publication date: 20 November 2020

Contact head office (see page 64) or local representatives (see page 63).

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## Pet industry highlights



### China International Pet Show (CIPS)

12 to 15 November 2020  
China Import & Export Fair Complex  
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[en.cipscom.com](http://en.cipscom.com)

### GlobalPETS Forum Asia

13 November 2020, Virtual  
[globalpets.community/globalpets-forums](https://globalpets.community/globalpets-forums)

### GlobalPETS Forum Europe

20 to 22 January 2021  
[globalpets.community/globalpets-forums](https://globalpets.community/globalpets-forums)



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Correspondence may be edited for clarity or length.



### Matthieu Lambeaux appointed Chief Executive Officer of AgroBiothers group

His appointment is part of AgroBiothers growth strategy on the European market. Matthieu, 50, has held significant leadership positions in the agro-industry, frozen food as well as in the fresh food market.

### Fressnapf Group selects Shippeo to optimise transparency in supply chain

Fressnapf Group's new partner Shippeo is the European market leader in real-time transport visibility solutions. The partnership will be the basis for further digital transformation, as well as better planning for the flow of goods.

Shippeo enables the Fressnapf Group to get a complete end-to-end view of stock transport from North America, China and Europe to its five distribution centres in Germany. The volumes it handles – from sea freight to road transport – consists of 10,000 containers and more than 25,000 truck deliveries per year.



### Kemin names new leadership for its pet food business unit

Kemin has appointed Alberto Muñoz (right) as Marketing Director and Nicola Abrate as Operations Director Palatants and Proteins for Kemin Nutrisurance, its pet food and rendering technologies business unit.



### HUNTER worldwide: 29<sup>th</sup> brand store opens in Hong Kong

The newest HUNTER store – the 29<sup>th</sup> worldwide – is located in a shopping centre in Hong Kong's New Territories district. With a total area of 64 sqm, it also provides a grooming service. HUNTER stores have now been successfully launched in 19 countries around the world, and this is the fifth location in Hong Kong.



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## Pet industry highlights

### Ikdeep Singh named President of Mars Pet Nutrition North America

Mars Petcare has hired Ikdeep Singh as Regional President of its Mars Pet Nutrition North America division. Singh will replace Mark Johnson, who has led the division for the past six years. Johnson will continue to lead the business until the end of the year, while supporting Singh's onboarding.



### Plaček Group celebrates 250<sup>th</sup> store

The Plaček Group operates pet shops in the Czech Republic, Slovakia and Romania under the name Super zoo. In Poland, it has Kakadu, and in Latvia and Russia its stores are called Dino Zoo. The 250<sup>th</sup> store is in the Czech town of Jablunkov. It is the fourth generation of the Super zoo concept, and also a pilot project for the group, testing the 200 sqm store size.

Plaček Group plans to open 12 new stores by the end of 2020. The plans for 2021 are even more ambitious, with 40 new stores.



### zooplus AG: strong sales growth continues

Europe's leading online retailer of pet supplies completed the first half of 2020 with a significant increase in sales and profitability. Despite the pandemic-ridden environment, zooplus was able to maintain its business operations. 

#### The results at a glance:

- Sales up 19% to €862 million in H1 2020 (H1 2019: €727 million)
- Sales retention rate back to the record level of 95%
- Improved management of the product sales mix led to an increase in gross margin, at 30.5% in H1 2020 (H1 2019: 28.4%)
- Sharp rise in operating profitability resulted in EBITDA of €29.4 million in H1 2020 (H1 2019: €4.5 million)
- Strong free cash flow of €29.6 million in H1 2020 (H1 2019: €6.9 million) underscores group's internal financing capabilities
- Sales and earnings targets for current financial year raised again in July 2020.

### Koch (Germany) taken over by the third generation

'Dogs & Cats Accessories Ernst Koch', founded in 1973 by Ernst Koch, is passing to the third generation. The founder's granddaughter Julia Tanz and her husband Silvio Tanz are to take over the company, which will be rebranded to K.O.C.H. Heimtierwelt GmbH.



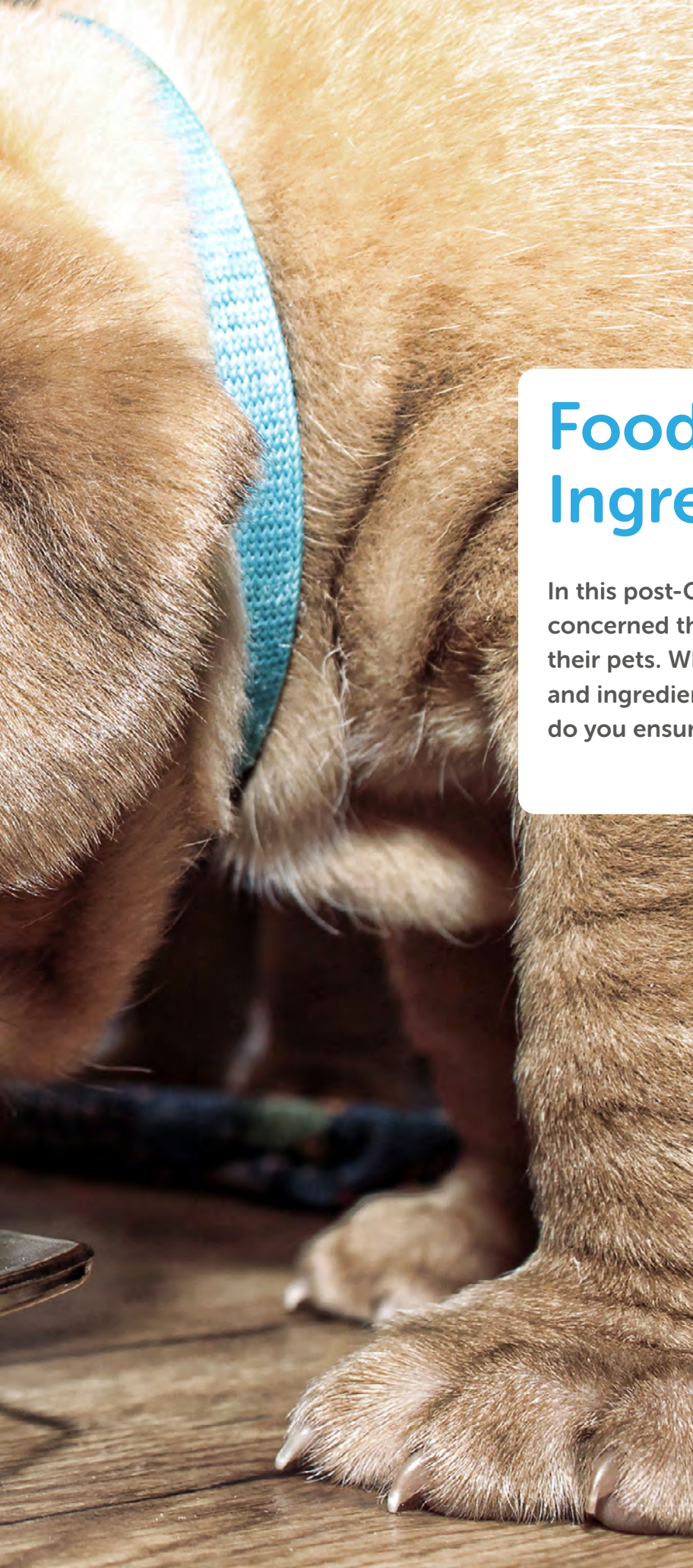
### Vadigran (Belgium) handed over to the third generation

At Vadigran, the third generation is also going to further map out the company's path. The new management is formed by Samuel Van Lathem in the role of CEO and Yana Van Lathem as CHO (Chief Happiness Officer).









# Food and Ingredients

In this post-COVID world, pet owners are more concerned than ever for their health and that of their pets. What are the implications for pet food and ingredients? What is the role of raw and how do you ensure that food is optimally healthy?

Do raw foods have a role in the pet food industry?	12
Prebiotics vs probiotics	14
Raw and risky?	16
United Petfood BELGIUM	19
Natural ingredients with nutritional benefits make the difference	20
Dolina Noteci POLAND	23
What is the best pet food palatant?	25
The benefits of wet food in a cat's diet	29





# Do raw foods have a role in the pet food industry?

In COVID times, consumers are extra keen to keep themselves and their pets healthy. Many see raw and lightly processed pet foods as good for their pets, despite some concerns about pathogen contamination. Setting aside the latter issue for discussion elsewhere, our focus here is on the question: Does reduced heat processing have health benefits for pets?

## Research focus

Published research evaluating the impact on health of lightly processed (heated) or raw products has focused on three areas: modifying the gut microbiome, impacting nutrient digestion and the formation of advanced glycation end-products (AGEs).

## Improved microflora

Proper management of gut microbiota is known to help pets avoid gut-based maladies and improve overall health. Studies reporting findings from dogs consuming raw versus traditional kibbled diets have demonstrated changes in gut microflora similar to what one would expect with consumption of higher amounts of dietary protein. Further, a more diverse

gut microflora is generally considered to be more likely to resist the occurrence of pathogenesis. Dogs consuming raw meat diets compared to a kibbled diet resulted in a more diverse microflora.

## Improved nutrient digestion

Improved nutrient digestion is looked upon as evidence of higher quality diets. Lipid, energy, protein and fat digestibility have been shown to be increased, at times, when dogs consumed raw diets compared to a kibbled diet.

Effects on digestibility of raw or lightly processed diets do not appear to be exclusive to dogs. Digestibility of several nutrients (dry matter, organic matter, crude

## Food and Ingredients

protein, gross energy) was increased, stool output was decreased, and long-term (26 weeks) health status was maintained when kittens consumed raw diets compared to the control, a canned diet. The caveat to several of these studies is that the major ingredients in these diets varied, making it difficult to conclude whether digestibility differences were due to processing and/or ingredients.

### Fewer AGEs

Heating during processing increases the formation of AGEs. AGEs have been implicated in promoting a number of health maladies such as cancer, obesity, diabetes and renal insufficiency. An analysis of several cat foods and dog foods reported AGEs being 38 times (cat foods) to 122 times (dog foods) the level of

intake normally consumed by humans. Consumption of lightly processed or raw foods by pets would help avoid excessive consumption of AGEs.

### More research needed

Raw and lightly processed diets deserve a closer look based on the current nutritional evidence as well as their consumer appeal. More research is needed regarding the effects of heat processing on dog and cat health. ♦



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# Prebiotics vs probiotics

There is considerable scientific evidence that intestinal microbiota is key of general health, not just gut health. How can prebiotics and probiotics help, and which should be preferred?

### Benefits of healthy microbiota

As 70% of immunity capacity comes from the intestine and as the brain gut axis is now better understood, scientific literature widely demonstrates the benefits of a healthy microbiota. Moreover, several diseases like obesity, Alzheimer's and Parkinson's have been shown to be linked to unbalanced microbiota. Microbiota modulation is therefore an important approach for many diseases, both in human and animal medicine.

### Beyond antibiotherapy

Until recently, antibiotics were used to limit the proliferation of potentially harmful bacteria. But we know that antibiotics destroy many other useful bacteria, and this is now negatively perceived for its impact on the environment.



Beyond antibiotherapy, there are only three ways to modulate microbiota: prebiotics, probiotics and faecal transplantation. Looking at prebiotics and postbiotics in particular, there is plenty of scientific literature on their benefits in many species including humans, fish, chickens and pigs. But there is much less when it comes to dogs and cats.

### Probiotics

Proposed benefits of probiotics include blocking intestinal pathogenic bacterial effects, regulation of intestinal epithelial cell functions, regulation of mucosal immune responses, effects on the general immune function and synthesis of vitamins or enzymes. For instance, *Lactobacillus* synthesises B vitamins and some of the proteolytic and lipolytic digestive enzymes.

However, for different reasons like EU regulation and patent protections, the opportunities to use probiotics in pet nutrition in Europe are still quite limited. There are only three EU-approved probiotic strains for use with dogs and two for cats.

### Prebiotics

In contrast, there is a wide choice of prebiotics available for pet nutrition, like fructans, FOS, GOS, XOS, SOS, lactulose and resistant starch. Although the same principle applies to all of them, they do not all have the same scientific backup, especially for dogs and cats.

Generally speaking though, because prebiotics are the substrate necessary for the growth of 'good bacteria', we can expect prebiotics to deliver at least the same benefits as those proposed by probiotics, without the constraints listed above.

### The winner is...

Thus, prebiotics are by far the safest and simplest way to modulate microbiota. They can be given every day in the food, with the best ratio costs–benefits. Among prebiotics, short chain fructo oligosaccharides (scFOS) are the subject of the highest number of scientific publications regarding their specific benefits in pets, allowing pet food manufacturers to make nutritional claims. ♦

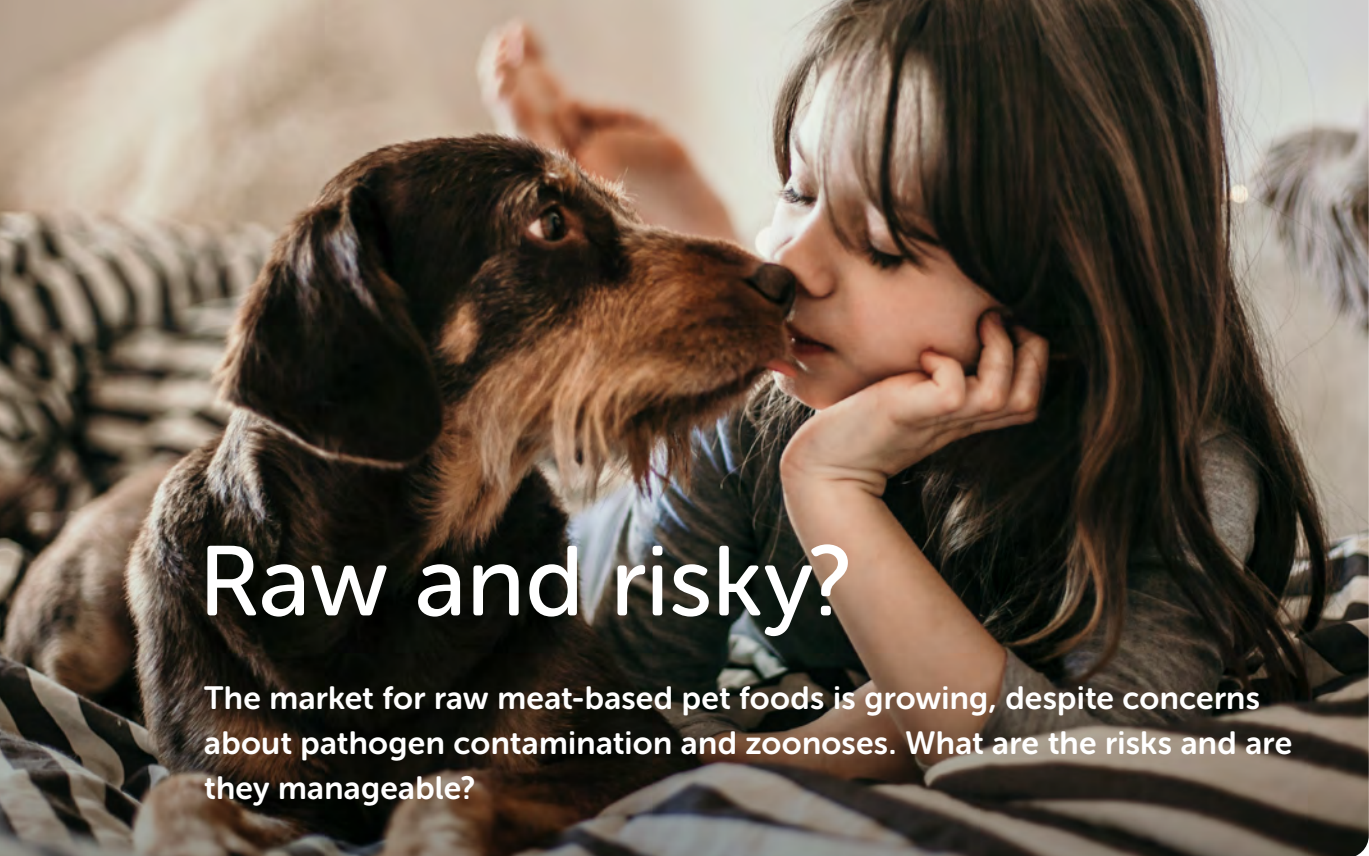
- A **prebiotic** is a nondigestible selectively fermented food ingredient that results in specific changes in the composition and/or activity of the gastrointestinal microbiota.
- **Probiotics** are live microorganisms which when administered in adequate amounts confer a health benefit on the host.
- **Faecal transplantation** is the transfer of stool from a healthy donor into the gastrointestinal tract to treat recurrent diseases.



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# Raw and risky?

The market for raw meat-based pet foods is growing, despite concerns about pathogen contamination and zoonoses. What are the risks and are they manageable?

## Raw meat risks

Raw meat and animal by-products, whether intended for human consumption, for raw meat-based diets (RMBD) or for extruded and canned pet food, are at risk of bacterial contamination. The risk is at its peak during manipulation at slaughter, evisceration, processing or packaging when contamination with digestive contents, feathers, or similar contaminants could take place.

## Pathogens and parasites

There are many different pathogens threatening the safety of raw meat, but *Salmonella spp* is most commonly reported in the context of public health risk. Other important pathogens to keep in mind when addressing raw meat hygiene are *Escherichia coli O157: H7*, *Clostridium spp.*, *Campylobacter jejuni* and *Listeria spp*. As for parasites, ones to pay attention to include *Toxoplasma gondii*, *Echinococcus multilocularis*, *Sarcocystis spp.* and *Neospora caninum*.

## Control measures

Luckily, control over parasitic contamination can be achieved relatively easily by freezing, but parameters such as parasite species, size of the frozen material and temperature all play a role. Conversely, bacterial contamination seems to be a more challenging factor to control completely, even by conducting protocols such as high hydrostatic pressure treatment.

Control of zoonoses, such as salmonellosis, is carried out by applying complex veterinary measures. Differences in legal requirements, from one part of the world to the other certainly do not help. Additionally, no legal obligation exists that covers all the possible pathogens.

## From pets to humans

The public health risk becomes apparent through the coexistence of humans and pets in the same households. Owners and other members of the household become exposed daily to contact transmission of pathogens that may be present in the diet or through environmental contamination. Additionally, our pets can become asymptomatic carriers and thus excrete microorganisms into the environment that pose a risk for individuals with a weak immune system, children, elderly and pregnant women.

There is a long way to go when it comes to raw food safety and most veterinary professionals do not seem to be comfortable recommending raw meat feeding regimes. We must continue to strive for better education, transparency, and pet food quality control. ♦



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# Quality pet food

**What defines quality pet food?  
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in its 'Good Food Principle'.**

## What is good quality?

Although quality has always been an important driver for consumers when buying pet food, the importance of healthy ingredients and nutrition is gaining more and more attention. How do we know whether or not the food we buy for our dogs and cats is of good quality? A natural question which is often hard to answer.

Consumers tend to evaluate the quality of pet food based on marketing and special claims. At the end of the day, our pets are the final customer and their response and well-being should be the most important motivator when buying a product.

## The Good Food Principle

Cats and dogs are not tempted by claims, packaging designs or health trends. They just eat what they like and what makes them feel good. Drawing on years of research and experience, the company discovered that 'feeling good' relies on

three basic criteria: taste, digestibility and health. It has encoded this in its 'Good Food Principle'.

## Taste

A pet makes its first contact with a new product by smelling and tasting it. Brands invest a lot in beautiful product designs and campaigns, but the pet's approval is what is most important. Palatability of products depends on several factors like taste, smell, ingredients, texture and shape which, properly integrated, result in a good product approved by the pet.

## Digestibility

Once the pet has finished its meal, pet parents monitor if the product is digested properly by checking the quality of its faeces. Badly digested food not only causes unhappy pets but increases the risk of constipation. Digestibility is largely determined by the quality of the ingredients and the production process.

## Health

The third essential criterion is health. To optimise the health of our pets, they need to be given the best possible nutrition.

## Ensuring quality

United Petfood is continuously researching to enhance the palatability of the products and invests in the best available production technologies and employee training.

It collaborates closely with customers to create the perfect formula which is then made with the highest consistency to ensure a qualitative product.

The Good Food Principle forms the basis against which any new formula must be tested. This gives the company the certainty that, even when responding to today's challenges and trends, quality never falters. ♦

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## Natural ingredients with nutritional benefits make the difference

More and more pet owners want the same quality for their pets' food as their own. This often means pet food including natural ingredients.

### What the trend is about

According to a recent study, most pet owners were more likely to purchase a pet food labelled 'made with natural ingredients'. Natural is defined as an ingredient derived solely from plants, free from any artificial or synthetic ingredients and processed without any chemical process.





The focus of this natural pet food trend is on the nutritional benefits of ingredients. Pet food with ingredients including fibre, minerals and vitamins gives pets the overall nutrition that they need to function. In addition, vitamins also contribute to the body's ability to resist disease. Pet owners also prefer pet food with ingredients that support digestive health.

### Vegetable and chicory ingredients

Vegetables and chicory are natural ingredients which add health benefits in pet food.

Vegetable ingredients are a good source of fibre, minerals, vitamins and antioxidants. Research shows that vitamins are very important for a good health, vision and skin, and protect cells against oxidation.

Chicory ingredients include inulin. Inulin is a soluble fibre and has a prebiotic effect in the colon. It arrives almost intact in the colon and serves as a nutrient for bacteria that positively influence the digestive flora.

### 100% natural

Duynie Ingredients produces vegetable, chicory and other 100% natural ingredients in its new factory in the Netherlands. The wet incoming products are dried, making them easy to handle and manage so they can be ground or cut to the right consistency for use in pet food or muesli. Examples include carrot granulate, pumpkin flakes and spinach powder. The company's R&D department is constantly doing research and advancing its product expertise, so that it can offer customers the best tailor-made advice and products.

### Reducing environmental impact

Sustainable pet food is just as important as natural pet food. Pet owners want to feed their pets in a sustainable way that respects the environment. By using co-products from the food industry, the company enables maximal resource use and therefore helps prevent food loss. All products are dried using residual heat and green electricity, instead of fossil energy. Using Life Cycle Assessments (LCA), it is proven that the environmental impact of these ingredients is lower because they have a lower impact on land use and a lower carbon footprint than alternatives on the market.

### Recognised

The Pet Sustainability Coalition (PSC) has rated Duynie Ingredients for the second year as one of the top 20 most sustainable companies of the pet industry. This is an independent confirmation that the company is a leader in providing sustainable pet food ingredients and contributes to sustainable pet food consumption. ♦



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duynie-ingredients.com





# Piper<sup>®</sup> animals

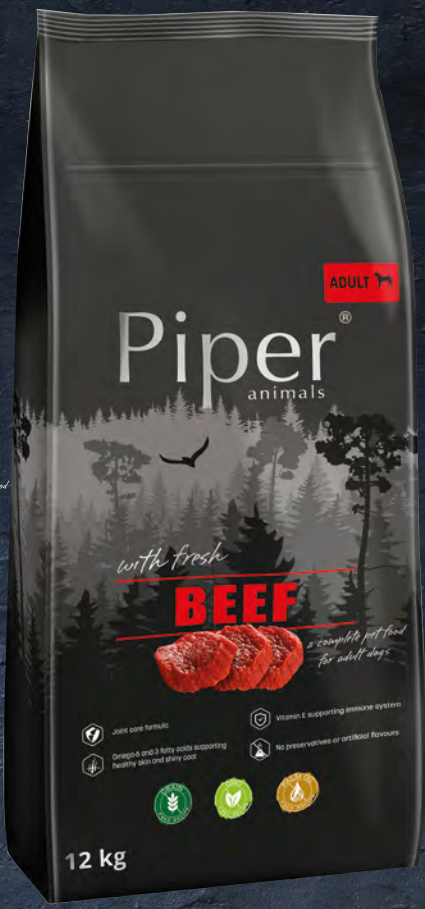
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# Innovation and development

Dolina Noteci is one of the most modern and environmentally friendly pet food production plants in Europe. The company is constantly evolving, using the latest scientific knowledge of animal nutrition to create new, improved formulas that meet pet owners' expectations.

## Sustainable production

Production is carried out with advanced equipment, not only to ensure highest quality products, but also taking into consideration environmental issues by optimising the processes, reducing the use of energy and other resources to a minimum. Sustainability in the functioning of the plant is the best way to protect the environment.

## Guarantee of quality

Raw materials like meat, animal derivatives, fruit and vegetables come from reliable suppliers, with whom the producer has been cooperating for many years. All ingredients undergo a multi-stage control, conducted by a group of experienced technologists. Thanks to such standards, the company is trusted by numerous pet food brand owners in Europe and beyond.

## Premium pet food

Premium pet food is made out of love for animals, to ensure their health and good condition. These products are dedicated to consumers who care about their pets and value high quality. The company creates natural products with balanced composition, full of vitamins, nutrients and enriched with functional additives that positively affect the functioning of pets' body.

Piper Animals, the flagship export brand, offers a wide range of flavours and weights giving customers the opportunity to choose the product that suits their pets' needs and preferences. The line has recently been complemented by dog and cat dry pet food available in four flavours.

## Unique wet pet food

Selected types of meat combined with natural functional additives guarantee

exceptional taste of the company's Superfood range. In addition to dog food, there are also products for cats, formulated with as much as 80% high-quality meat, fish and crustaceans – including veal, sea bream, shrimp or lobster.

## Culinary delicacies for dogs

The company's Cuisine line reflects an innovative approach to dog nutrition. The recipes are based on specially selected raw materials of human-grade quality. This unique composition of meat, fruit and vegetables is a luxurious meal for pets. ●

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- High palatability.





# What is the best pet food palatant?

Choosing the best palatant for a customer is a complex process that demands a deep understanding of the customer's needs.

## What is best?

'Send me your best palatant to test.' This is a request that the R&D Department of AFB Europe gets often, and it is not a simple request to fulfil. That is because there is no universal 'best palatant'. Consider the example of selecting a dessert in a restaurant. Would you say 'bring me your best dessert' if you know you love chocolate but are allergic to nuts? The server needs to know something about your taste preferences and dietary restrictions to select the best dessert for you.

To serve a customer optimally, it is essential to get the best information available. With that information in hand, it is possible to perform a careful analysis to recommend options that will work synergistically with the desired product, leading to high-performing results.

## The palatant in play

Different flavour profiles can yield the same excellent palatability performance. To determine the best approach, it is necessary to understand the interaction of the palatant with other factors that may affect palatability. Crucial to performance are factors like product formulation, ingredient quality and process capabilities. It is also important to recognise the customer's performance parameters and definition of 'best'. This could include beating a current product, meeting a competitive benchmark, or winning against a new off-the-shelf brand.

Also, if a palatant is for a product that must meet a specific market position, cost structure, benchmark, label, regulatory constraint or ingredient claim (grain-free, natural, etc.), this will impact the palatant decision, too. The more pieces of the puzzle that are available, the easier it is to select a palatant designed not only to deliver excellent performance, but also to work within a customer's matrix of parameters.

## More than one best

There also may be more than one 'best' palatant for a customer. In reality, there may be multiple options to achieve the customer's performance objectives. If one option is not preferable for application or formulation reasons, or if more than one option is needed to distinguish diets, multiple palatability solutions are available.

By clearly understanding a customers' complex needs and providing more than one 'best' palatability solution, AFB lays a firm foundation for success. ♦



**Han Laumen**  
R&D Director Europe, AFB International  
hlaumen@afbinternational.com  
afbinternational.com



## Advertorials

### Golden Eagle Petfoods FINLAND Holistic Salmon

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The Kobe, Okinawa, Akita and Iwaki are the newest members of the EBI family. These Dutch design scratching posts are inspired by the Japanese Zen concept. The aesthetic of this series resembles calmness, and minimalism. They are all covered with a soft interior fabric & fit perfectly into any interior.

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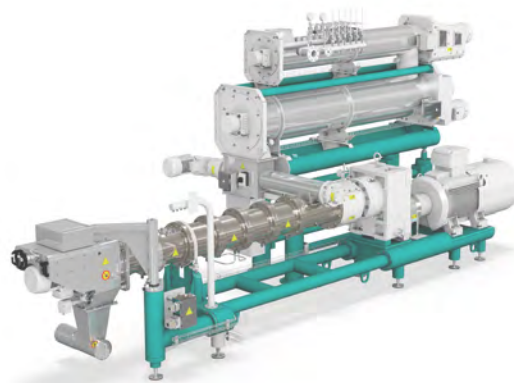
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# The benefits of wet food in a cat's diet



**Wet food can play an important role in improving our cat's health, contributing to fewer veterinary visits over the pet's life.**

## Dry diet problem

Kibble-based diets have gained in popularity because of their convenience, practicality and cost. They allow for free-feeding and do not spoil in the bowl for a long time. There are, however, drawbacks. Dry food may result in overfeeding, as it is condensed. Also, contrary to naturally obtained food, kibble has at most 10% of moisture. Cats do not biologically compensate for the absence of water by simply drinking more. Since they originate from arid zones, their first natural response to low moisture foods is to concentrate their urine rather than drink more and this, in time, may lead to health problems.

## More water, better urinary health

The water requirement of an average cat is 250 ml per day (one cup!). Cats usually drink little and cat owners have difficulties in encouraging them to drink enough. Feeding wet food helps to sneak in some water. Up to 75% of a cat's water requirement can be satisfied by food alone.

Wet food contains 60-80% of moisture resulting in diluted urine, which in turn prevents problems in the urinary system, such as urolithiasis. Although our pets drink noticeably less, their total daily water intake is substantially improved.

## Cats' favourite

Wet food is reported to be more palatable than the dry foods. That is probably because it is richer in protein and fat, which naturally pleases the cat's taste buds. Additionally, wet food is usually more aromatic and comes in a variety of textures.

## Healthy body weight

Since water has no calories, wet food has lower energy density on an 'as is' basis than dry food. Consequently, it may reduce total calories consumed, help with weight loss or prevent the risk of obesity in cats. Moreover, the cost per calorie and the perishable nature of wet food may reduce owners' tendency to overfeed their pets.

## Practical dietary consideration

With all this in mind, it is still good to expose our pets from youth to various textures, both dry and wet, in order to minimise the risk of neophobia (the avoidance of unfamiliar food types) in case health issues and vet's recommendations require a major dietary change. ♦



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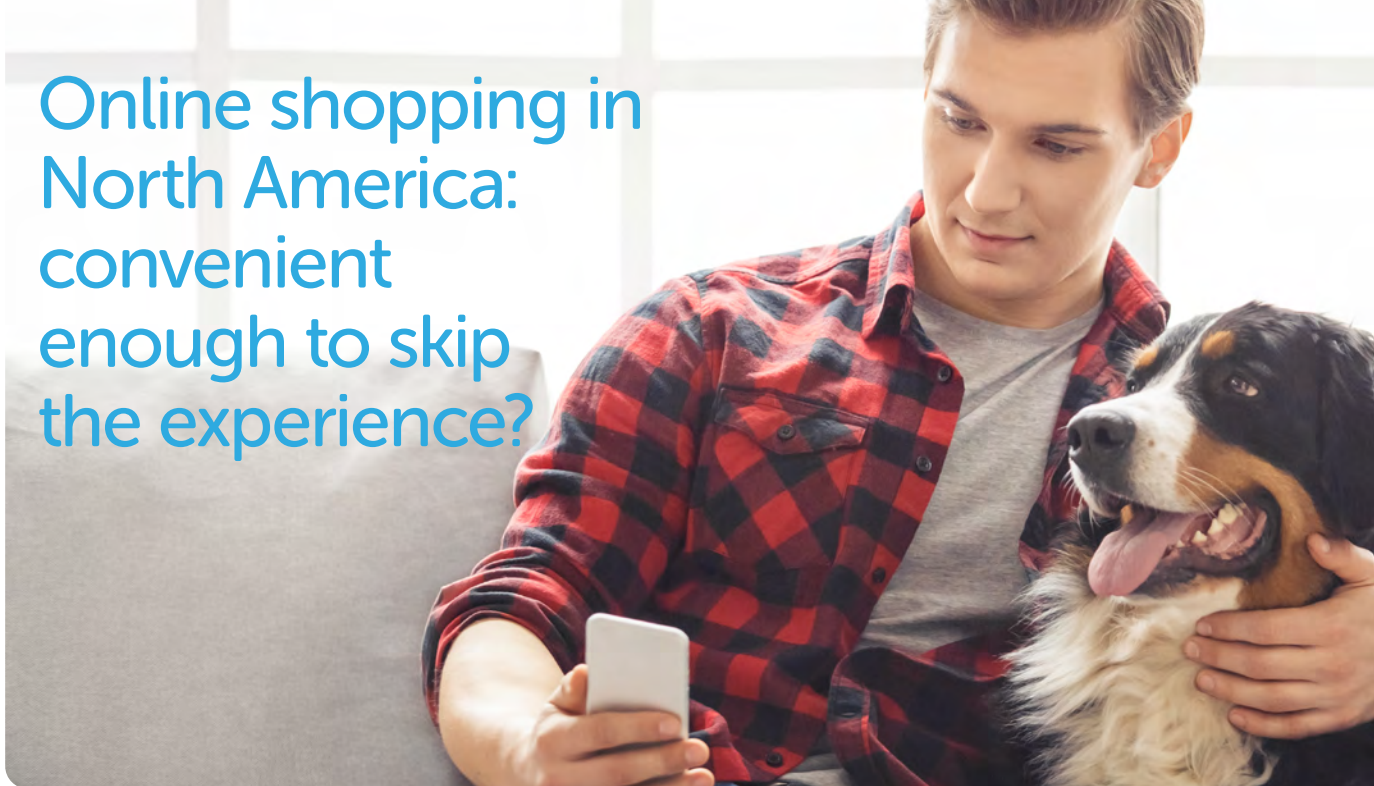
# Accessories

Pet health and safety, more than ever before, are drivers in the accessories market. As pet owners are increasingly on the lookout for accessories that fit their lifestyle and offer solutions for their concerns, this market is expected to grow exponentially in the near future.

Online shopping in North America: convenient enough to skip the experience?	32
Trends in leashes, lines, beds and cushions – where fashion and comfort mix	34
Accessories: novelties for dogs	36
Check out the latest trends in leashes, lines, beds and cushions in the UK	38
Global pet wearables market – A market with great potential	40



# Online shopping in North America: convenient enough to skip the experience?



PETS International and Yummypets have recently conducted an extensive survey in North America to find out what pet owners think of online shopping as opposed to traditional shopping.

## General behaviour

The first, significant finding of the survey was that there is a large difference in pet owner shopping behaviour in Canada versus the US. When asked about their shopping behaviour, a mere 14% of Canadians indicated they primarily use online channels, versus 28% of the US pet owners.

Not surprisingly maybe, therefore, is that 51% of Canadians said they prefer traditional shopping, whereas that percentage is only 33% of pet owners in the US. The remainder of the respondents answered they use both channels.

Furthermore, 61% of US pet owners say they buy online using their smartphones, while only 44% of Canadians say they buy online in this way. Canadians seem to use their desktop more often (46%), while only 23% of US pet owners use their desktop to shop online.

## Why not?

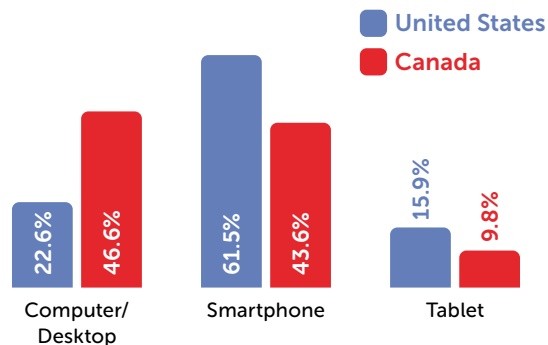
When asked why pet owners prefer to purchase at traditional pet retailers, more than half of the respondents in both countries cite as main reasons the added value of seeing what they are buying and getting personal advice and information about a product.

A third of all respondents – again in both countries – say they need to do their own research on the internet before buying online, because e-commerce websites fall short as far as sales support goes.

## Spending habits

There is a notable difference between the amount of money people from both countries spend on their pet products. As can be seen in the graph, US pet owners more often spend a higher amount on purchasing pet products than their Canadian counterparts do. The reason for this could be the larger number of products that Americans buy per purchase.

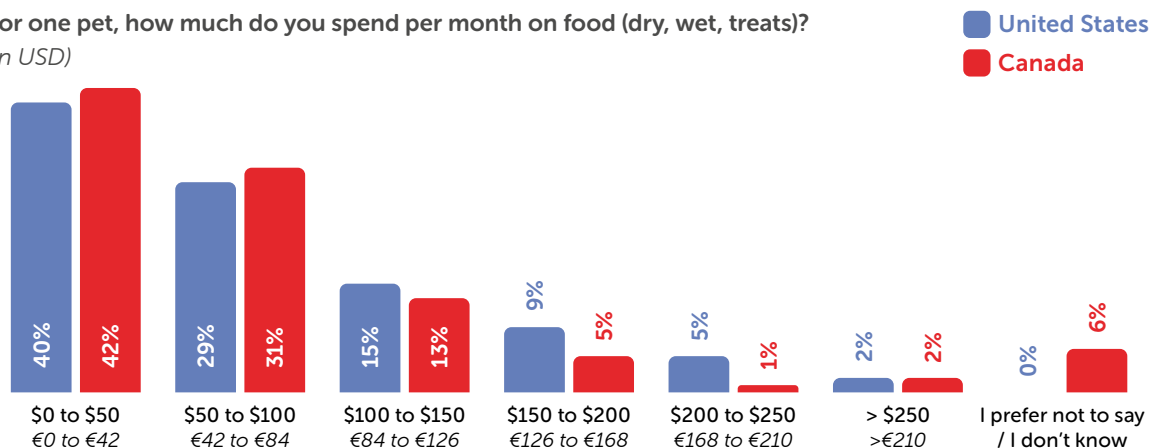
When purchasing online, which device do you use the most?



## Accessories

For one pet, how much do you spend per month on food (dry, wet, treats)?

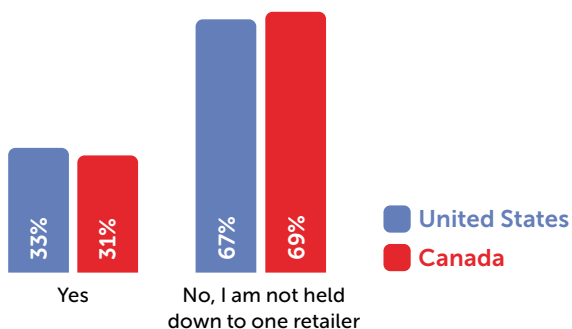
(in USD)



We also asked to what extent the weight of pet products influences the decision to buy online. Only 26% of Canadian pet owners say weight is of influence, compared to 47% of American pet owners.

However, time saving and convenience considerations for opting for online purchases are equal amongst pet owners in both countries.

Do you shop exclusively at one traditional pet retailer?



### Brand loyalty

Brand loyalty scores low in both countries. Around two thirds of both groups of respondents say they are not held to one retailer. This means that a third of both groups say they actually are loyal to a certain brand. This particular trend can be seen in couponing as well. When asked whether coupons or online reductions motivate the pet owner when choosing where to buy pet supplies, respondent percentages were almost the same: 60% of the Canadians say coupons influence their shopping behaviour, as opposed to 65% of US pet owners.

### Conclusions

It is safe to say that pet parents from both countries are increasingly likely to use online platforms for buying pet products, but mainly for pet food, treats and toys. This is possibly due to the fact that consumers already know which pet food they want. Moreover, treats and toys are a small and a not so specific purchase and therefore safe to buy, without having first seen or felt it. Leashes, bedding, playpens, strollers and other products, however, are purchased less online as pet owners prefer to feel and experience such larger purchases before buying.

Importantly, the survey showed that US pet owners prefer to buy big! They spend bigger amounts on supplies than the Canadians do.

Last but not least, North American pet owners are not particularly loyal to a single brand. They generally do not mind who produces their pet's food, as long as the quality is good, and the price is right. ♦



Our special thanks go to Yumypets!



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globalpets.community



# Trends in leashes, lines, beds and cushions – where fashion and comfort mix

**Exercise and rest. We probably all need a little more of both, and pets are no different. How are the trends in leash and bed accessories keeping up?**

## **An all-in-one convenient leash**

The concept of an all-in-one convenient leash has resulted in the introduction of new leashes equipped with things such as treats holders, water bowls, and of course, poo bag holders.

Leash fashion is taken care of with designer branding and colours, but the humble short lead may not be the future as we try to exercise our dogs under control. Dog training is desirable, but many people prefer not to let their dog entirely off the leash, or are not allowed to do so by law. Longer, retractable leashes and lines combine safety and responsibility, and it is here that the human trend for tech and fitness has really overtaken purely functional leashes.

## **Smart leashes**

As a result, the humble leash has seen an upsurge in style and technology! Smart leashes, such as Go

by PETKIT are high-tech, retractable leashes. Their functionalities include measuring walking and activity; linking to a smartphone via Bluetooth. Such USB rechargeable leads (with the possibility to charge your own phone too) are also designed to be more comfortable to hold. What is more, LED lights are a popular tech addition. They ensure walking your dog in the dark is safer.



## Accessories

The TUG 360-degree lead offers maximum comfort while walking the dog. The lead is extendable and a rotating section on the handle ensures maximum free movement. To counter the – for the owner uncomfortable – pulls of their dog, the SmartLeash absorbs the shocks, thanks to a shock-absorbent bungee/elastic attachment.

### Support for painful joints

Pet beds and cushions are subject to the same trends as their counterparts for human use. As pets live longer (just as humans), the trend is for luxury, long-lasting, easy to wash and padded, orthopaedic bedding. Pet beds are now also being designed to support joints and keep older dogs and cats happy and safe. The use of memory foam is widespread, again matching human demand in assisted posture.

Similarly, the demand for luxury pet bedding is growing. Typically, this market features anything from a pet four-poster bed, a designer mini-sofa or upholstered chair pet bed matching the owner's interior.

### Anti-anxiety

Separation-related issues in situations where dogs are left at home for longer periods of time, while owners go out to work, are driving the demand for anti-anxiety accessories. Anti-anxiety beds have a super-fluffy, softly padded design that supposedly allows the dog or cat to sink into the surrounding comfort and give them a feeling of snug safety. Taking things even a step further are beds with a cover that turn it into a den in which pets, especially cats, feel sheltered. ♦



**Karen Wild**  
Dog trainer and pet behaviourist  
info@pawprintpets.com  
pawprintpets.com



### Lex&Max THE NETHERLANDS Royal Velvet box bed

Lex&Max have once again expanded their range with trendy box beds. This time the box beds are made of Royal Velvet, the most popular interior fabric of the moment.

The box beds with detachable covers are available in 4 colours and 3 sizes: 75x50 – 90x65 – 120x80cm. Each size can be supplied as a completely filled box bed or as a spare cover in a luxury box.



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### Farm Company ITALY Sustainable soybean collars

A premium range of sustainable collars and leashes made from soybean fibres is the new launch in Farm Company's Green selection. Processed with cotton to increase strength, it ensures a cashmere-like soft touch, gentle on our pet's coat and environmentally friendly.

Enriched with high-quality bronze metal details, soybean collars come in 3 sizes and leashes in 2 sizes, with 5 different colour shades: olive green, taupe, burgundy, pumpkin and navy blue.

**Farm Company Srl**  
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# Accessories: novelties for dogs

**Modern dog owners now have access to a myriad of new products to take care of their fur kids and make life easier for everybody. Here is a little selection of the best new accessories for our canine family members.**

## **Playing games**

Let's play! P.L.A.Y.'s ZoomieRex toys not only bounce, but they also float, and they are durable and dishwasher safe. The IncrediBall, InfiniDisc and FantasTug toys are made of a buoyant material, and their ability to bounce makes fetch games even more fun! For even more excitement, you can add your pup's favourite treat in the little opening, to get a tasty toy.

We all thought about setting up a camera on our dog's harness, right? The Go Pro Fetch harness makes your dreams come true! This harness features two mounting locations: chest and back. From the chest

point of view, you can see all the digging, chewing or playing actions, and via the back camera you will enjoy all your dog's walks, jumps or fetch games. The harness is fully adjustable to fit dogs from 15 to 120 lbs (7 to 54 kg).

## **Clean paws**

After all this fun, it is time to go home. But not with dirty paws! Luckily, the Mudbuster Paw Cleaner is a very handy accessory. It is a cup with a silicone top and tendrils inside that allows you to wash your dog's paws without spilling water everywhere. Just put your dog's paw in the cup and the soft wet tendrils will do the job!

### Scooter for dogs

For dogs who unfortunately cannot run anymore because they are rear paralysed, the Walkin' Scooter from Walkin' Pets is a fantastic solution. It consists of a harness, combined with a rolling tray, and is designed for indoor use.

The Scooter's base is padded with memory foam for optimal comfort and is very easy to manoeuvre in all directions. It is combined with the Walkin' Scooter Bag lined with soft comfy fleece, which is a kind of harness covering the rear end of the dog, allowing the use of a diaper. And if your dog does not use the scooter, it can roam freely in the house with the Walkin' Drag Bag, designed to protect the dog's sensitive belly and legs, preventing scraping injuries.

### Great crate training aid

When it comes to relaxing or staying home alone, crate training can be really hard for puppies or anxious dogs. That is where the Groov Training Aid comes to help.

This little device is the first of its kind and is designed to help pups love being in their crate. Just add some flavoury paste on the device (peanut butter, for instance), and attach it to the crate. It will encourage licking, and your dog will be happy to be in the crate. It is also chewable, and comes with a freezer shell, allowing you to make tasty 'pupsicles'. ♦



**Marie-Sophie Germain**  
Journalist and author specialised in pets  
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# Check out the latest trends in leashes, lines, beds and cushions in the UK

**AMA Research shows that exercise, relaxation and rest for both pet and pet owner is the driving force in purchasing behaviour.**

## **New trends, new opportunities**

The need to provide a safe and comfortable sleeping and resting environment – as well as being able to keep pets under control whilst out and about – has recently led to a number of innovations and introductions in the UK pet accessories market.

The leashes, lines, beds and cushions sector traditionally accounts for 8-10% of the UK pet accessories market, currently estimated as being worth €1.1 billion (\$1.2 billion). Now, the demand for multiple use, trend-conscious and higher quality products will grow this market in the years to come.

## **Out and about**

Formerly viewed as just an essential product for maintaining control, leashes have undergone a metamorphosis. As never before, leashes come in a variety of materials, colours and lengths to suit all sorts of outdoor activities: from a simple walk in the park to putting in the miles whilst running with owners.

Many dog owners have numerous leash and harness combinations: each one fit for that certain occasion.

Fashion is also making inroads into this sector. Leashes co-ordinate with collars and harnesses, and even with the outfits worn by owners. The demand for products in different colours is, in fact, huge.

## **Safety at play**

Additional product enhancements have focused on safety features, particularly the 'see and be seen' aspects. This has led to increased demand for high-vis products or those containing reflective materials.

A more recent innovation in the retractable leash sector has been the inclusion of a LED light in the handle or a detachable torch unit to show the way in the dark. Some suppliers are also including LED strips within the leash fabric. This can be programmed to flash and warn other pedestrians and cyclists that there is something ahead.

**And so, to bed**

Comfort and cleanliness are key product features within the beds and cushions sector of the UK market. Owners are increasingly projecting their own needs for comfort onto their pets resulting in higher specification for pets' beds. Washable products – including mattresses and cushions with removable covers that can be easily cleaned – are particularly in demand. As are brighter colours and patterns.

Similarly, trends and innovations in human beds and furnishing are also making inroads into the domain of pets. For instance, memory foam now features prominently in cat and dog bedding. Comfort and security are also key features with cooling/heating

mattresses and pads. Orthopaedic and non-slip products for pets are also quickly expanding their market share.

In fact, owners of dogs, cats, rabbits, hamsters, guinea pigs and more, are now faced with an extensive, and potentially overwhelming, choice of bedding: from orthopaedic beds and mattresses, through to calming high-sided products, snuggle tunnels, igloos and tepees. Sweet dreams! ♦



**Jane Tarver**  
Marketing & Research  
JaneTarver@amaresearch.co.uk  
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# Global pet wearables market – A market with great potential



**High-tech solutions and devices in answer to pet parents' health and safety concerns are set to grow the pet wearables market four-fold.**

## The market drivers

As pet parents' concerns about their pets' health and safety increase, they are spending more and more on identification and tracking devices. At the same time, new technologies are enabling innovative and radical ways of tracking pets and communicating with them using owners' laptops, smartphones or tablets.

It is expected that the wearables market will be subject to significant growth the coming years, growing from its current market, valued at over \$3 billion (€2 billion) in 2019 to \$12 billion (€10 billion) by 2026, according to a recently published research report by Global Market Insights, Inc.

## IoT for pet health and safety

With the implementation of advanced technologies like IoT, GPS-based trackers, and AI, pet wearable devices enable owners to track their pets' health data, including data on their eating habits, respiratory rhythm, and sleeping patterns.

## Smart vests

Looking at opportunities within product segments, the smart vests product category is expected to show higher demand over the coming years. Smart vests are fitted with hidden sensors and video cameras, to make sure that the pet is secure. The technology is capable of live streaming videos when the dog starts barking.



This particular function has also led to the adoption of these devices in stray dogs for the purpose of safety and security. Citing an example, back in 2017, stray dogs in Thailand were equipped with smart vests in order to safeguard the streets and the dogs, by noticing unfriendly strangers and other such dangers.

Also, in the identification and tracking market sector, there is expected to be significant growth in demand. Such growth can be attributed to the higher number of lost pets. According to Pet Found by Internet, approximately two million pets go missing worldwide every year. This has boosted the adoption of tracking technology in advanced devices. The addition of RFID technology in pet wearable devices is enhanced by inserting a microchip just under the skin of pets.

### Commercial end-use segment

The commercial end-use segment in the pet wearables market is projected to fuel more demand for pet wearables owing to the development of modern farming. These devices are used for tracking, as well as monitoring livestock, in order to identify health-related issues at an early stage.

### Latin America

From a regional perspective, pet owners across Latin America are increasingly concerned regarding the security and safety of their pets. This will further grow the demand for wearables, especially those that feature GPS tracking, as well as live positioning functionalities.

In fact, the rise in the numbers of missing pets in the region has grown pet safety awareness. At the same time, stricter safety regulations are being imposed. For example, Peru has launched initiatives, including chip placement for lost pet search, as well as a special registry for dogs. Such initiatives have further spurred the adoption of pet wearable devices throughout Latin America, especially in Argentina and Peru.

### Who's in?

It is safe to say that the integration of advanced technologies and rising concerns regarding pet health and safety are likely to offer a varied range of growth opportunities for pet wearables market players. The competitive landscape of the pet wearables market includes companies like Whistle Labs, Inc., DeLaval, Inc., Tagg, FitBark, IceRobotics, Invisible Fence, Otto Petcare, Pet Vu, Inc., Dropcam (Nest), Motorola, Garmin, Ridogulous Labs, Nedap, PetPace, i4c Innovations, and Loc8tor among many others. ♦

Source:

[www.gminsights.com/pressrelease/pet-wearable-market](http://www.gminsights.com/pressrelease/pet-wearable-market)



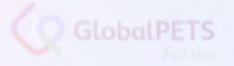


# GlobalPETS Forum

Winning the Hearts of  
Pet Parents Around the World



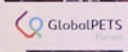
Tom Pletcher



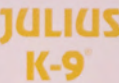
## GlobalPETS Forum

Thursday 26th April 2018

- 13:45 Customer approach of the online retailer
- 14:30 Customer approach for an off- and online retail partners
- 15:00 Winning the Hearts of Pet Parents Around the World
- 15:45 Break & networking
- 16:30 Q&A session
- 16:30 Pet parents, customer research
- 17:00 Panel discussion
- 17:30 Networking starts
- 18:00 Social evening



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Exclusive brands – ins & outs, do's and don'ts	44
Why 'by community' is the future of brand building	47
Brand purpose and neuromarketing	49
Pláček Group CZECH REPUBLIC	50
Retailing, sourcing and brand building in an omnichannel world	51
The GlobalPETS Forum Award	52
The sponsors of the GlobalPETS Forum 2021	54





# Exclusive brands

**The theme of this GlobalPETS Forum is: Exclusive brands – ins & outs, do's and don'ts.**

### Staying connected

To stay connected with today's consumers, it is vital to have a strong brand based on loyalty and trust. A strong brand is no longer exclusively reserved for premium brands. Over time, in the mindset of consumers, private labels have also become brands: 'Exclusive brands'.

What effect do premium brands and exclusive brands have on your business when it comes to partnering with retailers, creating categories and brand building via omnichannel platforms? How is COVID-19 affecting premium and exclusive brands? These vital questions – and more – will be answered by this year's interesting set of speakers:

**Cate Trotter** is the Head of Trends at Insider Trends. Cate and her team help large retailers to innovate and implement world-leading, profitable retail ecosystems



in the online and offline world. What role do premium brands and exclusive brands play in this? What developments are being seen in today's world, and what could they mean for your position in the pet industry?

**Dr. Constantinos Pantidos** and his team have done a lot of research involving consumer neuroscience and its influence on building brands. His research also covered the pet industry. Based on this all, he



has developed 'THE WHEEL OF MOTIVES™'. This tool aligns all brand manifestations, including creative executions, colours, shapes, flavours, messaging, etcetera, in the world of building brands.



Today's consumers are becoming 'tired' of commercials. How do you stay away from commercials and use authentic storytelling in your marketing communications?

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The first impression of a product is vital for success. What is a good design? What is the role of packaging? What influence can neuro insights have? All this will be part of a presentation by

**Loe Limpens**, an expert in private

label design. It is a story full of practical insights and suggestions.



In these changing times, there are a lot of developments in online and IT solutions. Augmented Reality (AR) and Virtual Reality (VR) can also play an important role in pet retail. **Daria Fedko**, CEO and founder of WeAR

Studio, will introduce us to this new world.



Brands, exclusive brands, and changes and trends in the pet industry – who better to present the latest from Euromonitor International than Senior Consultant for Food and Nutrition **Karine Dussimon**.

## COVID-19 procedure

In these uncertain times, you can sign up without financial risk. On November 20<sup>th</sup> we will decide, based on guidelines of the authorities, if the forum can be organised. If so, invoices will be sent. For all details, go to: [globalpets.community](https://globalpets.community)

## Prominent pet industry speakers



The pet retail landscape is changing rapidly. **Javo Osa**, CEO of the combined group Kiwoko and Tiendanimal, gives insights and his views on current trends, and their own exclusive and premium brands.



In Europe, Vafo Group – also known as Brit – is a leading player in the pet market, producing premium brands as well as exclusive brands. Head of Product Development **Karolina Capova** will share their views on

developments and trends in the European pet food market in relation to brands and private labels.



We will also put the Forum spotlight on developments in brands and exclusive brands in the world of pet accessories.

**Will Chen**, CEO of P.L.A.Y., is an international accessory manufacturer. He will take us with

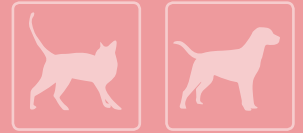
him into his world.



**Jodi Watson**, a senior executive with over 20 years' experience in retail/wholesale and former SVP at Petco, takes us on the development journey of pet and other retail brands: premium and exclusive. What are the

implications of short-term contracts versus 'long-term' contracts for exclusive brands? How do you build categories and implement this successfully when building brands offline and online? ♦





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# Why 'by community' is the future of brand building

What do today's successful brands have in common?  
They all recognise that the world of retail has changed.

## Adapting your strategy

In the past, to be a successful brand you needed a good product and good marketing. You also needed a good relationship with the third-party retailers who were your fulfilment channel. That is no longer the case. Any company can set up a website, list their products on a marketplace like Amazon and sell via social media. Even physical retail is within your control, due to the ability to book pop-up store space in a matter of clicks. The only thing you need to build a brand is a community.

## End user becomes stakeholder

Look at digitally native beauty brand Glossier, currently valued at \$1.2 billion+ (€1 billion+). Starting out as a beauty blog, it learnt so much about customer needs that it could successfully launch its own product range. The company has always seen its customers differently – as end users, not retailers buying for their stores. Glossier can stay hyper-focused on the consumer because it sells through its own channels. This connection has enabled it to build a powerful community – the brand now calls its customers its 'stakeholders'.

## Rewards for brand fans

Craft beer company BrewDog has taken this further with its 'Equity for Punks' initiative. The scheme enables brand fans to buy real shares in the firm, in

exchange for rewards such as discounts and early access. The more you buy, the better the rewards.

Share ownership is not just for show – even a single share will get you to the brand's annual general meeting (AGM) and shareholder events. For those that invest, there is a real sense that the brand belongs to the customer, which makes them more loyal and committed. They want it to succeed as much as BrewDog does.

## Being the first

There is certainly scope for you to build your brand like this. Anything that people are passionate about will attract a community – and we all know how passionate people are about their pets.

The key here is first-mover advantage. You cannot wait for your competitor to build a successful community and hope to do the same. If you see a space for your company to do something similar, the time to act is now. ♦



**Cate Trotter**  
Head of Trends at Insider Trends  
cate@insider-trends.com  
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# Brand purpose and neuromarketing

**By buying pet food and selecting specific brands, people satisfy their own deep psychological needs as well as the needs of their pets. What steps are necessary to strengthen your brand and align all its manifestations to dramatically enhance purchase behaviour?**

## Who am I?

A brand is a living entity that creates an 'unfair advantage' for its owner. It is much more than just a good service or product sold at a nice price with nice advertising. To exist, a brand needs a soul that becomes the compass for all its actions. It needs to ask the fundamental questions: 'Who Am I?' – 'What Am I Here For?' – 'What Do I Stand For?'

This is good news. By honestly answering these questions, a deep connection with the consumer becomes possible. From that point on, the ROI of each and every brand action is increased, building one on top of the other.

## Unconscious decisions

If the brand purpose is defined through marketing exercises, and translated into disparate actions, it simply does not work. Its dependence on functional attributes and price will cause the 'brand' to always remain on the ground. 95% of all decisions, including purchasing decisions, are unconscious. So the best way to capture the brand and its purpose is to link it back to neurobiology.

## Holistic approach

The brain was designed to spot inconsistencies. Each piece of communication can win over our attention and drive sales. To do so, its different signals should form a coherent representation in the brain. That is why we need neuromarketing to build the brand, its purpose and all its manifestations – products, stores, packaging, advertising, websites, social media and brand identities, including logos, colours, flavours, materials, sounds, scents, etcetera. Unless we start with the brand as a whole, the unconscious impact of the brand on the brain will be minimal, with each action risking being deselected or ignored by the brain.

Purchase behaviour may be largely unconscious, but it is not arbitrary. That is why we need to understand the neuro-motives – the deep biological and psychological reasons why shoppers buy a product or service. ♦



**Dr. Constantinos Pantidos**  
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brandaviators.com



# From distributor to leading retailer



Plaček Group started in 1987 as a wholesale company in the Czech Republic. Over the years it has developed into the leading wholesale and retail group in Eastern Europe.

## Retail = experience

Plaček Group has 250 stores in Eastern Europe and is still growing. In the past 14 months, it has opened 25 Super zoo stores in the Czech Republic. In the fourth generation of its Super zoo retail concept, consumer experience is vital, as well as a state-of-the-art look and feel. So there is livestock in all the stores, and in Latvia and Slovakia there are also veterinary clinics.

## Brick-and-mortar versus online

The group has one main focus: 'there is only one customer'. So its activities are based on an omnichannel approach. Whether for offline or online, the prices, support and customer promotions are identical. Integrating these channels means that all stores are also pick-up points (click & collect). Having this platform in place before COVID-19 started has resulted in a

25% increase in online sales during the past six months.

## Wholesale still important

Wholesale was the group's original activity, which later expanded into Russia (1991), Slovakia (1993) and Latvia (2001). It has since matured and is still vital for the group.

## The future

Plaček Group has proved to be a flexible company that is open to new opportunities, but customer orientation is always key. After all, it is satisfied customers that lead to profit! Every single day, improvements are devised for every department – from sales to IT. The company recently invested in logistics that have created the most modern and efficient warehouse system. ♦

♦ **Plaček Group**  
info@placek.cz  
placek.cz

## Milestones

- 1987** Dušan Plaček exported the first tropical fish to Germany and Italy
- 1991** Plaček s.r.o. wholesale company founded in the Czech Republic
- 1996** First warehouse building and offices
- 2003** Joint venture with Dutch partner Beaphar BV – Beaphar Eastern Europe s.r.o.
- 2004** Start of the Super zoo concept
- 2007** Acquisition of Dino Zoo pet shops (Latvia)
- 2007** Foundation of Hagen Russia (Moscow)
- 2013** Start of wholesale activity in Poland
- 2014** Acquisition of Kakadu pet shops (Poland)
- 2015** E-commerce operations in Czech Republic, Latvia, Slovakia and Poland
- 2019** Opening of the first mega pet store: Dino Zoo (Russia)



# Retailing, sourcing and brand building in an omnichannel world

**During this time of COVID-19, there are major developments in the retail and online landscape. It can be useful to get tips and advice on how best to navigate this rapidly changing environment.**

## Best practices

While developing and building your own brand – whether via a direct-to-consumer relationship or via a speciality retailer – it is important to explore different options to gain a greater understanding of which approach is right for you.

One of the ways to do this is to look at best practices, for example to help determine whether a private label brand would be effective for your company. There are guidelines available to evaluate if this is the right approach based on some of the measurements of success.

## Private brands

Private label brands are a key way in which retailers and manufacturers can enter into a mutually-beneficial relationship. However, this strategy is fraught with complexity which can lead to tension and conflict if not done right.

Sourcing and developing a new brand to sit alongside a well-known manufacturer's brand can benefit the retailer. It gives the retailer more selling control, stronger margin profiles and new revenue opportunities, while manufacturers can enjoy greater

distribution of their products and increased knowledge of end users. But there are pitfalls to avoid for all involved – and ways to ensure it is a winning strategy!

Once you have decided to develop a private brand, there are multiple steps to take to ensure success, including the development of safe, quality products and strong brand recognition.

## Ensuring success during COVID-19

Many retailers are seeing big changes and having to react quickly to these changing times. In the US, speciality pet retail is experiencing triple-digit growth online and rapidly shifting their resources to address new patterns of shopping and innovation. Tactics such as buy online / pick up curbside (click & collect) have been implemented by nearly all speciality brick-and-mortar stores. The demand for e-commerce experts has grown exponentially, and retailers are quickly trying to rebalance their IT priorities to support all digital initiatives. ♦



**Jodi Watson**  
Independent Retail Consultant  
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# The GlobalPETS Forum Award

Each year, the GlobalPETS Forum Award is presented to a company demonstrating exceptional performance in the international pet industry. Who are this year's nominees?



*GlobalPETS Forum Award winner 2020: Zolux (France)*

## **Prestigious prize**

The award is a prestigious prize and winners are truly honoured to be put in the spotlight. The winner has the right to use the special GlobalPETS Forum Award 2021 logo in their marketing communications. Last year, Zolux (France) was the deserved winner of the award. Who will win the GlobalPETS award in 2021?



# Nominees for the GPF Award 2021



## **Johnson Petfoods BV (The Netherlands)**

Ten years ago, Johnson Petfoods was built from scratch with a mission in mind: providing the world with healthy, artisan pet food. Their first range went down well and the company's status skyrocketed. The team now consists of ten ambitious pet enthusiasts who are full of ideas. With their motto 'the sky is the limit', they have received numerous awards in the Netherlands as a fast-growing company.



## **Beeztees (The Netherlands)**

Beeztees is not just another non-food brand for a segment of pet products – it is the first consumer brand for all pet accessories. With their own consumer research, uniquely designed products and a 360-degree approach, the company continuously pushes the boundaries of the pet category. In their fun-and-functional way, they are always 'looking for the edge'. Together with like-minded retail and e-tail partners, they aim to generate new traffic and create happy moments!



## **Josera GmbH (Germany)**

Josera is a family-owned company with 80 years of experience, driven by their passion for pet nutrition. Always keeping up with the customers' changing needs, they take pride in developing excellent, innovative and sustainable products. The pets themselves are at the centre of everything they do. Their goal: to deliver the right product for every stage of life and offer a solution for every dog and cat – and their parent.



## **Moderna (Belgium)**

Moderna is a globally recognised manufacturing company established in 1932. Today, the third generation of this 100% family business has taken the lead. And they are hyper-focused on holding true to their baseline: 'creating smart plastics for happy pets'. Operating out of two state-of-the-art production facilities in Belgium and the US, they highly value sustainability and are socially responsible in all they do. This is illustrated by inspiring initiatives like their Green Pact and their famous annual 'you sign, we donate' event. ♦



## **Collar (Ukraine)**

Twenty-five years ago, Collar started with three employees in a small apartment. Now, they are an international company with a team of 500 employees and products selling in more than 60 countries! They have their own development department and four production units (accessories, toys, aquatics and cat litter) and can even customise their products for retailers. Collar uses their ability to create a unique design, solution or exclusive brand as a competitive advantage.



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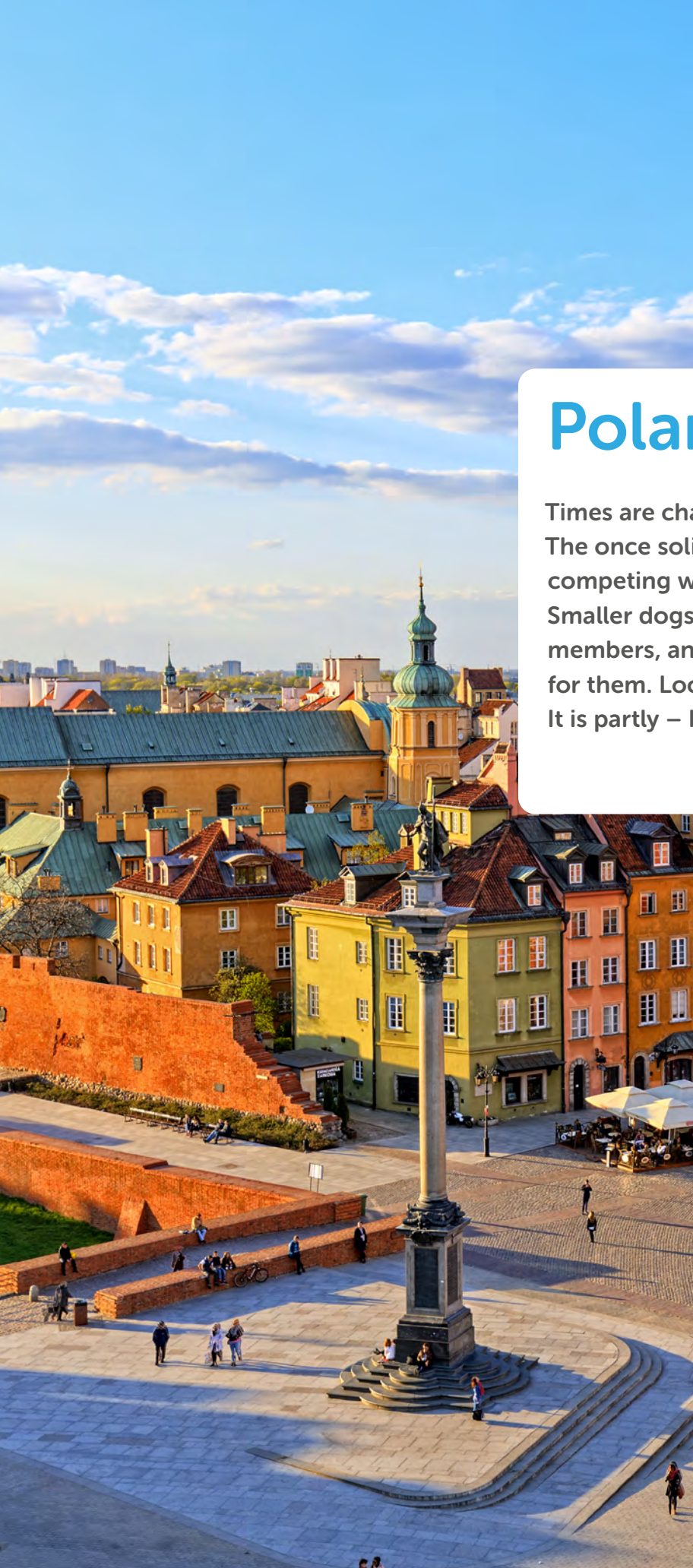
### Dingonatura S.L.

Dingonatura has been producing high-quality natural food for dogs and cats since 2001. Under the motto 'Cooking Values beyond diet', they want to keep pets healthy with a natural and balanced diet that also protects animals and respects the planet. They do this with sustainability protocols and their company values: Protect, Respect and Be Natural. In 2019, Dingonatura opened a new production plant which they refer to as 'The New Kitchen'. It is innovation-driven and among the most pioneering in Europe.

### M-PETS

M-PETS is specialised in the production of innovative and exclusive pet products. The company currently has 1,500+ SKUs with 350+ patents that are distributed in more than 40 countries worldwide. The company's mission is to lead innovation in the pet industry with products and design that enrich pets' lives.





# Poland and Russia

Times are changing in these large pet markets. The once solidly traditional retail trade is now competing with successful online channels. Smaller dogs are joining cats as valued family members, and their owners want the best products for them. Local pet food producers are expanding. It is partly – but not only – due to COVID-19.

The Polish pet market in 2020	56
The Polish pet market after the lockdown	58
COVID-19 shapes the Russian pet food market	60



# The Polish pet market in 2020



The pet market in Poland is one of the largest in the Central-Eastern European region. Since the late 90s, it has been growing at around 4-5% per year, based on historic sales at traditional pet shops and the growing role of e-commerce.

## Traditional retail

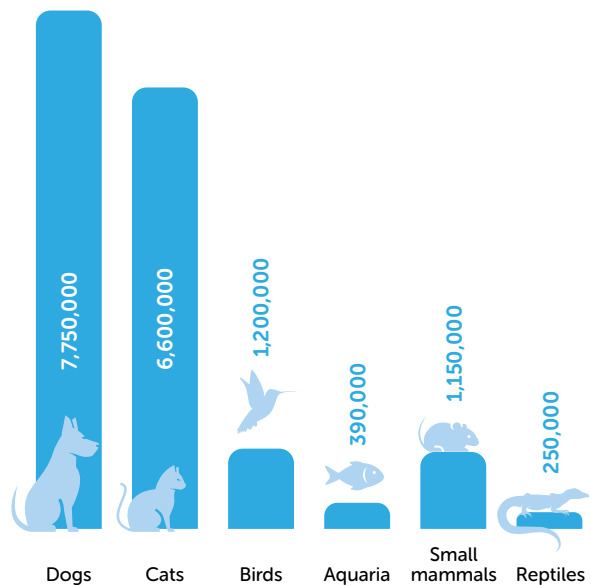
Poland is a Mid-Eastern European country with a population of 38.5 million. In 2019, its GDP per capita (PPP) was \$33,800 (€28,600), slightly higher than that of Portugal.

The Polish pet market is dominated by traditional pet shops (around 2,700), making it similar to the Italian pet market. On the other hand, in Poland more than 240 shops belonging to the eight nationwide chain stores have started to cooperate in some way. In 2019, the total pet care industry in Poland generated \$1,258 billion (€1,062 billion) in sales, which makes it a regional leader.

## Pet populations

In 2019, there were around 7.7 million dogs and 6.6 million cats living in Polish households. There are also significant numbers of other pets: an estimated 1.2 million birds, 0.4 million aquaria, 1.1 million small mammals and 0.2 million reptiles.

Estimated pet populations in Poland in 2019



Source: FEDIAF 2019

### Cats rule!

After years of market domination by dogs, cat food producers and distributors were satisfied with the developments in 2019. The cat food segment became the largest in the market, growing faster year on year than the dog food segment, and generated \$466.4 million (€394.1 million) in sales value. This follows the Eastern European trend of cat products dominating all pet categories in terms of sales value.

It was to be expected. In the Polish pet market, there has been dynamic growth in the high-quality cat food available at traditional pet stores and in the e-commerce channel. As cat owners and retailers know, cats are very fussy pets, so food promotions are not always successful. The manufacturers' answer is to launch new products that meet customers' expectations. So finding the highest quality food for fussy cats is no longer a problem in Poland.

#### Sales value in millions for dry and wet cat food in Poland

	2018		2019	
Wet cat food	\$291.5	€246.3	\$312.7	€264.2
Dry cat food	\$144.3	€121.9	\$153.7	€129.9

Source: Euromonitor International 2020

### Dog food growth continues

Dog food sales value continues to increase, but not as fast as it did a decade ago, nor as fast as the current cat food segment. The dog food market nationwide (supermarkets, discount stores, etcetera) is still dominated by low and semi-medium quality food. But there is an interesting trend in the dog food segment which may change the situation in the future.

A growing number of small and miniature dogs are being treated by their owners as part of the family. This

may well lead to increased sales of high-quality food in traditional pet shops. On the other hand, small and miniature dogs generally eat less food. Even so, the dog food segment generated \$453.7 million (€383.3 million) in sales value in 2019.

The value difference between the (wet plus dry) dog and cat food categories has reached \$12.7 million (€10.7 million), with the cat food segment leading.

#### Sales value in millions for dry and wet dog food in Poland

	2018		2019	
Wet dog food	\$131.4	€111.0	\$140.7	€118.9
Dry dog food	\$293.3	€247.8	\$313.0	€264.5

Source: Euromonitor International 2020

### E-commerce in COVID-19 times

The Polish pet market is still generally very traditional. Nonetheless, a growing number of traditional pet stores are beginning to explore an omnichannel strategy. Early adopters of this approach in Poland were pet chain store owners, who began to cooperate in the e-commerce channel a few years ago.

The COVID-19 lockdown accelerated pet shop owners' activities. Facing the crisis, more of them came to understand the important role of online marketing and omnichannel selling. A growth rate of more than 20% year on year is now forecast for online channel sales of pet care products in Poland. ♦



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Polish Pet Market Expert  
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# The Polish pet market after the lockdown



Karina Wojtylko

**Mateusz Karatysz interviewed two pet store chain owners on developments relating to COVID-19.**

**Karina Wojtylko,  
owner of the Zoo Karina chain**

**What was your strategy at the beginning of 2020?**

Before the lockdown, we planned further store expansion and increasing online sales.

**Did the lockdown prevent any of that?**

The new reality altered our plans for opening premises, so we withdrew from several contracts that had already been signed. Internet sales volume was much higher than expected, and we are now focusing on safely providing customers with items they are less likely to come and buy in our stores.

The pandemic has shown us how fragile a chain of shops can be, even if the trading ban does not apply to us. High rents, operating and labour costs can only be covered by sales revenue, but if customers stay home, sales fall too.

**What has already been implemented and what are you still working on?**

We are constantly refining our online sales system. Although we have worked on that for two years, there is still room for improvement.

Some IT systems are incompatible and we are further simplifying customer service.

### **What is your opinion of the Polish pet market's current condition?**

After a decline in store sales, we are slowly returning to 80% of pre-pandemic levels. Online sales have peaked and are now stable. Our industry is coming out of the crisis slightly battered, but with prospects for the future – unless the situation recurs in the autumn.

### **Bogumiła Jankiewicz, owner of the AqualZoo chain**

### **What plans are you implementing this year?**

We are not planning any major changes to our strategy. We still want to open new shops, but might also need to close some less profitable ones. That is not necessarily due to the lockdown.

### **Has the outbreak and lockdown disrupted any plans?**

COVID-19 has not actually disrupted anything. We did have a turnover collapse during the lockdown that has been hard to make up, but it simply sped up some of our decisions. In particular, a change to our online shop platform as part of AqualZoo, and implementation of a Click&Collect order system.

### **What has already been implemented and what are you still working on?**

We have implemented new methods of customer service due to sanitary restrictions. We wanted to take good care of our customers and employees.

We have also implemented the new ordering system, with a possibility to collect goods ordered online at a pick-up point selected by the customers themselves.

### **How would you assess the Polish pet market's current condition?**

We would say it is stable and are quite optimistic about its future. The increasing amount of COVID-19 cases has led to people staying home more and cancelling



*Bogumiła Jankiewicz*

holiday plans. This has led to a growing interest in safer hobbies like fishkeeping or having other pets. As people probably know, that is one of the therapeutic guidelines for staying healthy during the pandemic – but also at other times! ♦



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# COVID-19 shapes the Russian pet food market

The coronavirus pandemic has been a real game-changer in Russia, driving online sales to record heights and bringing long-awaited expansion opportunities to local businesses.

### B&M versus online

Pet food stores were among the few businesses allowed to continue operation during the nationwide lockdown between March and May. This helped brick-and-mortar stores to stay in business, but not to keep their revenues intact.

Nearly 83% of Russian pet food stores saw their revenue shrink during the lockdown. In research conducted by local company PerseiLine, 60% of them reported a 30-50% fall compared to the same period last year. For 16% of the stores, revenue was down by over 60%.

### New online customers

"The lockdown hit turnover hard at brick-and-mortar stores. But online stores have significantly strengthened their positions with an inflow of new customers," said PerseiLine director Alexander Burov. Online pet food sales have been booming. Major



Russian online retailer Ozon estimated that cat and dog food sales jumped by 249% and 265% during the lockdown compared to pre-crisis levels, according to their development director Elena Shulgina.

### Russian economy dented

The ongoing pandemic has severely impacted the Russian economy, increasing the unemployment rate and prompting citizens to tighten their belts. Surprisingly, the pet food market has not been affected. "The anticipated shift towards cheaper pet food has not happened. It seems that people are not ready to economise on their pets," Elena Shulgina said.

"Some customers may continue to purchase pet food through online stores rather than going to brick-and-mortar stores," said George Chkareuli, director of the Russian chain Bethowen.

### Room for growth

In 2019, Euromonitor International estimated total sales of pet food in Russia at 624,500 tonnes for \$3.05 billion (€2.57 billion). During the past few years, the market has been growing by an average of 8-10% per year.

The Russian association of pet food producers APK has estimated that market sales could grow by at least 50% in the next few years, reaching 1 million tonnes. The share of commercial pet food in pets' diets in Russia is still 2-3 times lower than that in Europe, according to Ekaterina Kardakova, APK spokesperson.

Russian producers could benefit from future growth more than importers. The pandemic has caused a downward slide of the Russian rouble, making imported products more expensive and less attractive to local customers. "Quite a few pet products are imported, with prices set to rise," George Chkareuli said.

### Local sourcing

Russian pet food production has been growing at an average of 10-12% in the past decade, Ekaterina Kardakova said. This is faster than sales growth, so products from local companies are gradually replacing imports. APK members have opened eight plants in recent years.

One of these is Russian agricultural holding Miratorg, who opened a pet food plant in Kursk Oblast costing \$80 million (€68 million) in 2019. The company is now considering investing another \$30 million (€25 million) to expand production for export in the next few years. ♦



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## Calendar of events



### Petindex

11 to 12 October 2020

Virtual

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



### GlobalPETS Forum Asia

13 November 2020

Virtual

[globalpets.community/globalpets-forums](http://globalpets.community/globalpets-forums)



### Pets Arabia

13 to 15 October 2020

Dubai, United Arab Emirates

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



### GlobalPETS Forum Europe

20 to 22 January 2021

[globalpets.community/globalpets-forums](http://globalpets.community/globalpets-forums)



### Pet South America

4 to 6 November 2020 (new dates)

São Paulo Expo

São Paulo, Brazil

[petsa.com.br](http://petsa.com.br)



### Pet Fair South-East Asia

20 to 22 January 2021

BITEC, Bangkok

Bangkok, Thailand

[petfair-sea.com](http://petfair-sea.com)



### China International Pet Show (CIPS)

12 to 15 November 2020

China Import & Export Fair Complex

Guangzhou, China

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



### Global Pet Expo

24 to 26 March 2021

Orange County Convention Center

Orlando, Florida, US

[globalpetexpo.org](http://globalpetexpo.org)

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

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## Advertisers index

Aqua One / Kong's (Aust) Pty. Ltd.....	62	Leiber GmbH.....	54
Bühler AG, Division Food Processing .....	28	Mealberry GmbH.....	27
Cat Litter Company .....	39	MyFamily S.r.l. ....	back cover
DNP S.A.....	2, 22	petideal / Qingdao Ideal Jingmao Co., Ltd.....	4
Fihumin-Gesellschaft m.b.H. ....	17	Premier Nutrition.....	13
Fish4Pets .....	20	Sanicat / Tolsa S.A.....	6
Fofos .....	60	Tianjin Ranova Petfood Co., Ltd. ....	24
Gepro Geflügel-Protein Vertriebsgesellschaft Mbh & Co. Kg.....	inside front cover	Tropical Tadeusz Ogrodnik.....	37
Global Pet Expo / APPA .....	8	Trouw Nutrition. ....	46
Italfeed S.r.l.....	14	United Petfood Producers Nv/Sa .....	18
ebi / Laroy Group nv .....	26	Yantai China Pet Foods Co., Ltd. ..	inside back cover
		Zolux s.a.s.....	48

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See page 5 for subjects. Contact head office (below) or local representatives (page 63).

### Colophon

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