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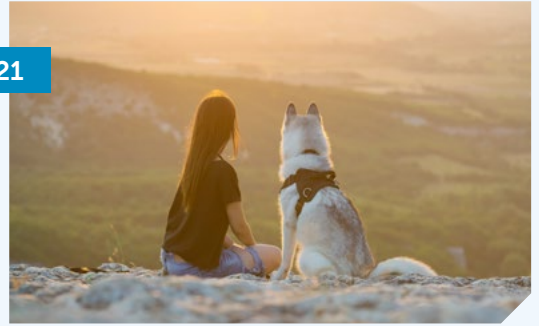




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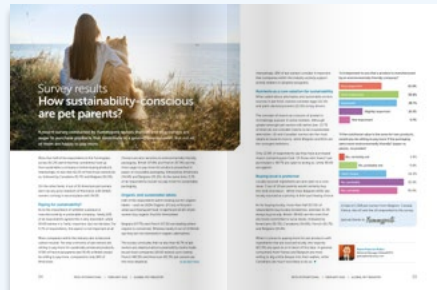
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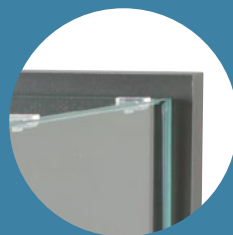
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# Are you ready for 2022?

COVID-19 has been very much a double-edged sword for the pet industry. On the one hand, we've seen the positive trends continue from 2020: more pets, more demand, an increase in M&A activity, more of everything. So for most players in the industry, 2021 was a terrific year once again. On the other hand, container prices keep on rising. Products and ingredients are becoming more scarce. And our GlobalPETS Forum had to be postponed. So it wasn't all sunshine and roses.

For better or for worse: The coming year promises much of the same. Are you ready for it? How have you planned to tackle the supply chain issues? How are you going to deal with rising costs? What are you doing to capitalize on the ongoing increase in consumer demand?

Each year, our New Year's resolution is to bring you the best possible content to help you keep a finger on the pulse of the industry. We try to help you navigate challenges and capitalize on new trends and other market opportunities. While we'll continue to do so, we're also excited about some of the improvements coming up.

As you've probably noticed, one of the things we decided to do was to give your favorite publication a new look. The cover has had its first update in half a decade. And you'll notice some small changes throughout the magazine.

Besides these cosmetic updates, we'll double down on the quality of our publications. Our new Editorial Manager, David Palacios, will play a big role in that. And we'll also experiment with some new ideas and formats. Both in the magazine and in our online publications. For example, you'll see some interesting new ways we'll explore trends soon.

Finally, together with the whole GlobalPETS team, I'd like to wish you a successful 2022.



*Philippe*

Philippe Vanderhoydonck,  
Managing Director

*PS: If you don't receive our newsletters yet, go to [globalpetindustry.com](https://globalpetindustry.com) and sign up.*



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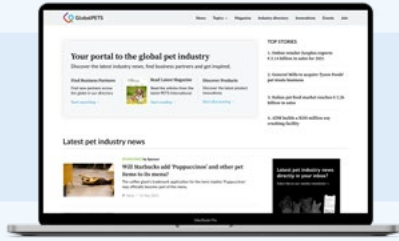
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**French hypermarket offers private label dry food through a vending machine**

Consumers in France can now get their order 24/7 – through a container vending machine in the hypermarket parking lot. The container offers dry kibble for both dogs and cats, produced by pet food company Sopral. Customers help themselves with their own bag or bucket. Payment is by credit card.

**Australian pet e-tailer Pet Circle raises \$125 / €110 million**

Over the past 18 months, Pet Circle in Australia has grown substantially. It has seen, for example, a 50% increase in puppy and kitten food sales.



The goal of a new round of investment is to accelerate Pet Circle's growth. It will increase its product offering, expand its warehouse footprint, and continue to develop its software platform. Besides selling products, Pet Circle also offers vetChat and telehealth services. This series C investment gives the largest Australian online pet retailer 'unicorn' status.

**Pet Supplies Plus opens its 600<sup>th</sup> store**

The US pet retailer celebrated its 600<sup>th</sup> grand opening in Gresham, Oregon.

"This tremendous growth in Pet Supplies Plus stores is not only from new owners joining our pack, but also from owners who have been with us for 30 years and continue to open new stores," says Chris Rowland, CEO. "Our friendly, local neighborhood pet store reputation is based on the passion our owners have for the pet industry and for serving their community. They love what they do, and know we support them with purchasing, marketing, technology, e-commerce and more."



**APPA CEO Steve King retires**

Steve King's retirement from APPA came into effect on 31 December 2021. After joining APPA in 2019, he helped guide the association and the pet care community through the tremendous changes resulting from COVID-19. APPA executive vice president and chief operating officer Andrew Darmohraj is now acting as interim CEO.







### Nordic pet retailer Musti Group grows by 20%

The pet retailer Musti Group, active in Sweden, Norway and Finland, has recorded net sales of €340.9 million (\$383.8M) in the past financial year. This retailer currently has 312 stores (134 in Finland, 128 in Sweden and 50 in Norway) and online sales now represent 23.1% of total sales.

“During our last financial year, sales grew by 20%. We gained market share in all markets and acquired a record number of new customers, including the parents of more than 50% of new puppies welcomed into families, and we did so while increasing our gross margin,” says CEO David Rönberg.

A core element of Musti’s strategy is growing the share of sales of own and exclusive products available only in Musti Group channels. “During the past year, we increased this share to 51% of all products. That was a key factor in the rise of our gross margin from 43.8% to 45.7%.”

### Christmas presents for pets on the rise

Dutch pet retailer Pets Place saw a 50% rise in sales of Christmas gifts for pets compared to 2020. The most popular product group was dog sweaters, with an 80% sales increase compared to the year before, following the ‘ugly Christmas sweater’ trend for humans. Other noteworthy and popular products for dogs included: animal-friendly ‘fries’ and alcohol-free Belgian craft beer.

But it’s not only dogs that were being spoiled. Rabbits and other rodents also got to participate in the festivities. Special snacks, like Christmas trees, saw at least an 80% increase in sales too.



### Nic Dechamps has passed away at age 66

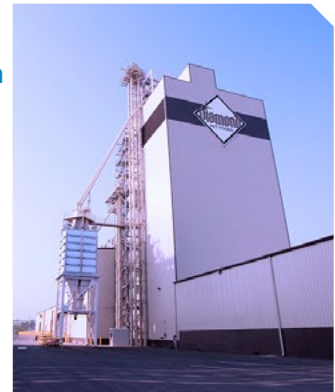
It is with extreme sadness that we announce the passing of Nicola ‘Nic’ Dechamps on 9 January 2022. Besides being the Managing Director of GENIC International, he also was the Chairman of the GlobalPETS Forum since 2000.

Nic leaves behind his loving family and will be remembered for his astute business acumen. He was always full of life and his cheerful and positive attitude impacted many in the pet industry and beyond. We will miss you, Nic.

### Diamond Pet Foods invests \$233 / €205 million in production facilities

To meet unprecedented demand, Diamond is expanding its production capacity at 2 locations in the US. Expansion plans include the acquisition of a private label dog food manufacturing plant from J.M. Smucker for roughly \$33 million (€29M), and a

\$200 million (€176M) investment to construct a brand-new facility in Rushville, Indiana. This will be a 700,000 sq. foot (65,000 sqm) facility that’s expected to open by 2023.



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# Food and ingredients

With consumers wanting to give their pets the best food products with the best ingredients, the search for differentiating product qualities continues. Which brain health additives or calming herbs can be used to make a product more attractive? Consumers are also flocking to meal toppers. Which types do consumers prefer? And what about broths?

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# Trends in meal toppers for dogs and cats



**Meal toppers are helping consumers to bridge the gap between kibble and raw diets for their pets.**

Sue Delegan grew up watching her grandmother make bone broth for the family, promising that it would make them healthy and strong. So when she adopted her dog, Brutus, before she had children of her own, it seemed only natural that she would follow the family tradition and make bone broth for her 'fur baby'. As Brutus got older, friends, family and even the dog's veterinarian began to ask what Delegan was doing to keep her elderly dog so healthy. The interest in her bone broth recipe inspired her to launch Brutus Broth in 2018, and demand for the product has continued to rise ever since.

## **Bridge the gap**

Like Delegan, a growing number of young adults have found themselves at the intersection of two related trends. Consumers increasingly regard their pets as members of the household and, as such, they want their pets' diets to resemble their own. But while the pandemic triggered a rise in interest in home-prepared meals for pets, a completely raw diet remains out of reach for most consumers. Meal toppers help to bridge this gap.

"Meal toppers are an easy, cost-effective way for people to be able to add nutritional benefit to their dog's existing diet, so they don't have to switch from a \$20

(€17.50) bag of kibble to a \$150 (€132) raw diet," says Delegan, co-founder and CEO of Brutus Broth.

## **Current trends in meal toppers**

Customers who purchase meal topper products tend to view mealtimes as an opportunity to bond with their pet, according to Carmen Velasquez. She is vice president of marketing for The Honest Kitchen, which produces an array of topper products for both dogs and cats. According to her, owners tend to look for ways to add variety to their pet's diet by introducing new flavors and ingredients.

This means meal toppers can take any number of forms – from broth pour-overs, gravies and even dehydrated flavor enhancers to more raw-food types of products. While the flavors can also vary, they tend to follow certain themes. Kathleen McCarron, founder of Portland Pet Food Company, indicates that chicken and beef are popular throughout the year, whereas flavors like turkey and even pumpkin tend to make an appearance around festive holidays as consumers seek to include their pets in family traditions. "There is definitely a humanization trend, in terms of pet owners wanting to feed their dogs and cats in line with what they themselves eat," McCarron says.





### Focus on healthiness

And just as consumers are interested in the healthiness of their own food, they tend to keep an eye on the quality of meal topper ingredients for their pets too. Products that add moisture or that include human-grade ingredients seem to be particularly appealing, according to McCarron. "People are starting to question what's really in kibble. There is a growing aversion to rendered meats and cooking processes that destroy natural ingredients so they have to be added back in," she continues. "Today's consumer is looking for a more natural, pure product."

However, this interest in meal toppers as a health supplement hasn't always resulted in products that are nutritionally sound, Deegan says. She explains that some products are essentially "potato chips in a box," with excess sodium and artificial flavorings. In that sense, the pet food market is similar to the human food market.

### New toppers for cats

While meal toppers have conventionally focused on canines, options for cats are quickly proliferating. The Honest Kitchen launched a toppers line for cats in 2021, and Portland Pet Food Company plans to come out with several toppers for cats in 2022. "Cats are very finicky, so a lot of people who own cats actually already feed them a mixture of kibble, wet and raw," McCarron

comments. "It may not be as novel, but I think what they're searching for now is good ingredients."

### Mirroring human food trends

Echoing the trends in the human culinary sphere, demand for local, vegan and sustainable meal toppers for pets is also growing. "We see a lot of vegans who want to feed their dogs great food. As someone who is personally active in the raw space, I see a lot of raw feeders who are vegan and who appreciate the sustainable vegan protein that is coming out for pets," states Deegan.

Demand for environmentally sustainable products has created an interesting challenge for pet food manufacturers, according to McCarron. She regards the use of upcycled ingredients as a feature that would appeal to environmentally conscious consumers. "Using upcycled ingredients is important right now because that seems to be what the consumer would like to see, and it's great for the environment," she says.

Meanwhile, in Velasquez's opinion, demand for human-grade ingredients seems likely to dominate the meal toppers market. "We believe that customers will continue to seek pet food options that mirror human food trends and align with their values," she comments. "As more people include wholesome and thoughtfully sourced foods into their diet, they're likely to add these foods into their pets' meals as well. We believe products that are minimally processed and human-grade will continue to be at the forefront of innovation in the meal topper space." ♦



**Emma Penrod**  
PETS International Contributor



# Can bone broth live up to the expectations?

There is increased demand for bone broths in the pet food market, but are the expectations in line with scientific findings?

Home-made broths have long enjoyed the reputation of being great meal toppers for pets. Broths enhance palatability, improve food texture in a kibble diet and serve as a source of hydration. Moreover, broth is often thought of as a supplement that helps prevent multiple health problems and improves joint flexibility.

## Nutritional values

Bone broth is made by cooking bones, skin, tendons, vegetables and herbs in water for more than 12 hours. It is thicker than a regular broth as it contains higher amounts of collagen and gelatin from bones. The nutritional content of a bone broth may vary depending on the type of bones used (mostly beef or poultry), the recipe and the cooking time. On average, 100 ml of homemade broth contains 31-86 calories, 3.8-6 g protein, 0-3 g fat, and small amounts of fiber, calcium, sodium and iron (source: USDA Nutrient Database). Bone broth is also high in amino acids and some sulfates.

## What does the research say?

The amino acid glycine is proven to inhibit proinflammatory cytokines in the gut lining of humans. As for gut health, gelatin tannate derived from collagen protects gastric mucosa against ulcers in rats. It may also bind the toxins of bacteria and prevent diarrhea. Cartilage and skin in bone broth are sources of hyaluronic acid, which definitely supports joint flexibility and the formation of connective tissue. Therefore, it is possible that broths could prevent joint problems.

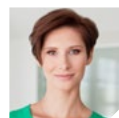
Despite these findings, however, there is no conclusive research data for pets such as cats and dogs. In fact, human-oriented bone broth recipes often contain ingredients (e.g. onions, garlic and salt) that can be toxic for pets.

## Commercial bone broths

Commercial bone broths are often a healthier choice for pets since they meet their requirements. A large variety of available broths made from beef, poultry or even fish bones ensures there is an adequate product even for pets with food allergies and specific intolerances. For extra convenience, commercial broths are available in liquid, frozen and freeze-dried or dehydrated-powder form, in a variety of packaging types (e.g. bottles, glass jars, resealable packs and pouches).

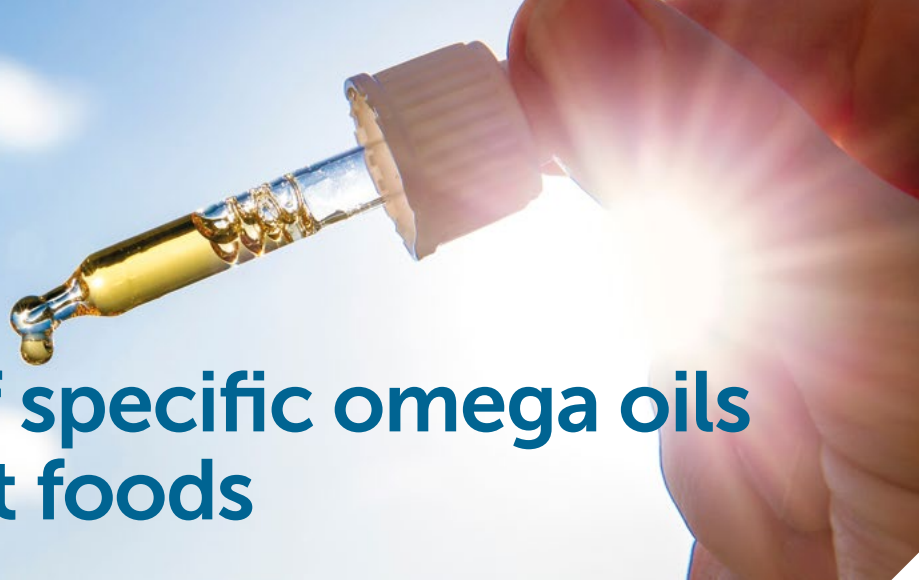
## Conclusion

Low-calorie and species-appropriate bone broths may enrich a pet's daily diet. However, due to the lack of strong scientific evidence relating specifically to dogs and cats, they should not be regarded as a remedy to all health problems or as an alternative to medication or veterinary supplements. ♦



**Karolina Holda, PhD**  
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on canine & feline nutrition  
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# Use of specific omega oils for pet foods

## Besides supporting skin, coat and reproduction, can omega oils also be used as brain health additives?

Research increasingly recognizes the importance of certain oils in pet foods. Docosahexaenoic acid (DHA) and eicosapentaenoic acid (EPA) are two omega-3 fatty acids that are linked to brain function and learning, and so are important in young dogs and those in training. At the other end of the scale, they have been shown to improve dementia and maintenance of the nervous system in older animals. According to some claims, they even offer protection against seizures in affected individuals and breeds prone to having fits.

### Important but differing roles

Both DHA and EPA are involved in the bilayer membrane of cells, where they increase fluidity. This forms the basis for improved learning capacity in mammals. However, they each play important but differing roles and are required together for best outcomes. DHA is more specifically involved in brain development and learning, whilst EPA has been linked to mood and behavior. Studies of Alzheimer's cases have shown that DHA has anti-inflammatory properties and reduces the formation of amyloid plaques, which are a feature of the disease.

Mammalian and human studies have stated that these oils are required to help prevent a variety of behaviors such as anxiety, aggression and hyperactivity. This can be useful in dogs that have separation anxiety or other problematic behavioral issues.

### Dietary supplementation is recommended

Both DHA and EPA are derived from alpha-linolenic acid, but this is an inefficient process in dogs due to

their metabolism. Therefore, dietary supplementation is recommended to attain the required levels. DHA and EPA are found in fish, krill and algae-derived oils, but levels vary. For example, Hoki oil contains a high level compared to tuna and cod oils, but lower than oil extracted from salmonids.

The currently quoted safe upper limit for DHA plus EPA for dogs is 208 mg/kg body weight. Although the precursor Alpha lipoic acid (ALA) is included in AAFCO-standardized diets, care must be taken to ensure that adequate EPA plus DHA is available due to metabolic inefficiencies in conversion from ALA sources (which may be from grains such as flaxseed).

### Further considerations

More direct research into the effective inclusion rates and measurable and specific benefits for dogs is required. However, supplementation is already being used in pet products for animals with existing neurological issues. As with all oils, antioxidant protection is required to prevent rancidity – which can lead to feed refusal – and to ensure optimally effective uptake and utilization in animals. ♦



**Dr. Lucy Waldron**  
Director, LWT Animal Nutrition  
[animalnutrition.co.nz](http://animalnutrition.co.nz)



# Addressing the rising consumer interest in immune health

## Why the COVID-19 pandemic offers opportunities for pet food manufacturers.

Since the SARS CoV-2 virus raised awareness of infectious diseases, consumers' desire to improve their own immunity has grown. Furthermore, owners often anthropomorphize their views onto their pets. As a result, the demand for pet products claiming immune benefits continues to rise too.

### The immune system

The immune system consists of the innate (quick response) and the adaptive (learned response) systems. About 70% of the body's immune tissue surrounds the gut, serving as a 'first line of defense' against allergens to the body. Immune cells in the body produce cytokines that create an inflammation response to address infectious threats (allergens). However, while the intent of the cytokine response is meant to quickly contain a threat, sometimes the inflammation response overreacts, causing the body more harm than good.

### Beneficial effects

The good news is that certain dietary ingredients can help modulate the immune response to assure the body is able to effectively respond to various allergen threats. For example, the antioxidants vitamin E and beta-carotene have been shown to have beneficial effects on both innate and adaptive immune systems.

Omega-3 fatty acids have also been shown to modify the inflammatory response by promoting the production of anti-inflammatory rather than pro-inflammatory cytokines.

Meanwhile, Alpha lipoic acid (ALA) is naturally found in diverse foods including red meats, spinach, yeast extract and broccoli. ALA serves as a potent antioxidant and has been shown in dogs to reduce eye lens opacity in diabetics, reduce cognitive dysfunction, improve learning in aged dogs, and reduce osteoarthritis biomarkers.

### Enhancing immune health in pets

Various gut microbiome modifying tools – prebiotics, probiotics and postbiotics – have shown beneficial immunity-enhancing properties. While a tremendous body of literature shows evidence for probiotics enhancing immune health, their use is limited in pet foods due to poor stability in the common types of pet food product forms. In contrast, prebiotics have greater stability in the common food forms; they influence the immune system via shifting gut populations of microbiota as well as serving as precursors of short-chain fatty acids. More recently, attention has focused on the immune health benefits of postbiotics.



Like prebiotics, postbiotics are generally more stable in common food forms. Given that postbiotics are typically effective at lower inclusion levels than prebiotics, their mechanisms must differ.

### Mineral status

In human nutritional immunology literature, the role of zinc in the immune system and its associated anti-cancer benefits are well known. This suggests that it may be appropriate to take a deeper look at the mineral status of pets. Many owners dilute their pets' calories with treats and other non-balanced calorie sources. Thus, the zinc status of pets may be compromised. At the very least, it is important to ensure that the pet consumes a complete diet with highly available forms of zinc.

Meanwhile, although the inclusion of vitamin C (ascorbic acid) is quite common in pet foods, the amount of data supporting its effects on pet health

is scant. Nevertheless, the low cost, low safety risk, and high consumer awareness have made ascorbic acid a common addition in pet foods.

### More innovations

Given the complexity of the immune system, more innovations will undoubtedly arise to help improve pet immune status. In the meantime, manufacturers should review their brand's products to ensure they are designed to address consumers' rising interest in immune health. ♦



**Gregory D. Sunvold, PhD**  
Cool Springs International  
[microbiomenexus.com](http://microbiomenexus.com)

## DOES LICKING MEAN LIKING?

Pet parents are more likely to repurchase a food their cats enjoy. That's why cat food palatability is so important to both pet food manufacturers and pet parents.

Typical two-bowl or one-bowl trials are a valuable way to evaluate food preference and acceptance. Additionally, AFB International wanted to develop new methods to assess cat food enjoyment that would represent what a pet parent might experience at home.

To learn more about how these behavior measures can provide insight to product performance, download our white paper **"Cats' Eating Enjoyment Informs Preference for Food Components"**.



# The challenges of meeting clean label expectations for pet food



## Common preservatives are increasingly falling out of favor with health-conscious consumers. So what are the alternatives, and are they really necessary?

Preservatives have long played a role in meeting consumers' expectations of 24/7 availability of the products of their choice. But in recent years, as consumer demand has shifted to include a greater focus on health and sustainability, many common preservatives have become the target of consumer suspicion – including in pet food.

### Preservatives excluded

Common preservatives such as propionates, sorbates and benzoates are all likely to be excluded by consumers seeking 'clean label' products, according to Eric Altom, a technical nutritionist specializing in animal health and nutrition for Balchem. Definitions of what it means for a food product to be 'clean' vary from one person to the next, but many health-conscious consumers will simply weed out products containing any chemical-sounding names they can't pronounce.

### Clean label comes at a cost

Alternative preservation options do exist, including natural extracts, vitamins and even new production techniques. In many cases, however, it will be necessary to reign in people's expectations – both at the production level and among the customers themselves. "I personally like the idea of the clean

label," says Greg Aldrich, a research professor focused on pet nutrition at Kansas State University in the US. "But you have to understand there's a cost associated with it, and that cost is a limit on what's in the food and a shorter shelf life."

### Natural preservatives

One of the most straightforward preservation solutions in clean label products is the use of more natural or more familiar ingredients that can serve the same purpose, according to Altom. Citric acids, vinegars, lactic acids and similar options can all be used to reduce microbial and mold growth, he says.

Aldrich explains that many of these natural preservatives – such as rosemary extract or vitamin C, for example – are created by plants as self-defense mechanisms, allowing them to combat pathogens or oxidation: "In the world of plants, there are all sorts of antioxidant molecules that a plant uses to 'detoxify' all of the UV radiation as it performs photosynthesis. So we can harvest those and think of them as beneficial."

Many natural acids are also used to lower the pH of products, creating a barrier to bacterial growth and helping to prevent the loss of moisture and natural



***A certain recalibration of expectations may be necessary, both within the industry and among consumers***

flavors, Altom says. However, these solutions also come with some drawbacks. "Natural preservatives tend to be less pure than conventional ones, which means they must be used in larger quantities to achieve the same results," he states. "This may impact the palatability of the product, or ultimately limit the amount of the preservative that can be added." On top of this, many natural alternatives don't last as long as conventional preservatives in food products due to their own limited shelf life, Aldrich adds.

### Changing expectations

Given the limits of these plant-based, natural preservatives, Aldrich believes a focus solely on swapping one chemical for another could be misguided. "We have to think about what the real question is here," he says. "Is it about the food form, or is it about the technique to preserve it?" He explains that, using today's technology, it may not be possible to take a traditional kibble with a one-year shelf life and make it fit clean label expectations – but it may not be necessary either, because a raw pet food product may not require the same form. A refrigerated product with a 12-week shelf life may also be sufficient.

That's why a certain recalibration of expectations may be necessary, both within the industry and among consumers. According to Aldrich, today's retailers envision pet food with a two-year shelf life, and shoppers expect to be able to buy nearly any product, any time – and it's easy to understand where these ideas originate from. "Consumers have come to expect that they can have fresh fruit out of season that has not had anything done to alter it," he comments. "And we've probably created that illusion over the years with food chemistry. In many cases, we've solved the most challenging issues in terms of bringing food out of season. But some technology had to be invented to do it, and in the past that technology was preservatives."

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### Educating consumers

Further advances in technologies such as microencapsulation may help to solve the problems of today. But for the time being, Aldrich says, the ultimate solution to the clean label challenge may be breaking away from the bag of year-old dry kibble, and educating consumers on why new product forms fit the bill they're seeking. "What I try to get across is that this is a perishable product – it's food for nourishment, not a leash or a collar or a fence," he states. "If customers are really motivated by the clean label with no chemical-sounding names, they may have to compromise on some other things, and one of those things may be a two-year shelf life." ♦



**Emma Penrod**  
PETS International Contributor



# Turmeric: harnessing superfoods in pet health

## As we continue to search for the next 'emerging' nutraceutical for pets, could the answer lie buried beneath the soil?

Turmeric is a flowering plant cultivated primarily for its roots, which contain bioactive compounds that have captured the attention of modern medicine. The veterinary community is now increasingly embracing this nutraceutical and beginning to understand the extensive benefits of turmeric to support pet health.

### All thanks to curcumin

The major contributor behind turmeric bioactivity comes from one naturally occurring phenolic compound: curcumin. This particular compound makes up 60-70% of the turmeric root extract. To date, numerous studies in both cats and dogs have demonstrated the therapeutic potential of curcumin associated with its anti-inflammatory and antioxidative properties.

### Problem with bioavailability

Before curcumin can be considered a viable option for disease prevention in pets, it has to consistently demonstrate its efficacy. This means curcumin has to reach target tissues and remain pharmacologically active, all without inferring toxicity to pets.

However, in its free form, the bioavailability of curcumin is extremely low. Not only is it insoluble in the blood,

but less than 1% of ingested curcumin gets absorbed by the intestines and makes it into the bloodstream.

Moreover, the curcumin that is absorbed becomes rapidly metabolized by the digestive system into curcuminoid metabolites. Although these metabolites demonstrate improved solubility and stability within the blood, this transformation diminishes curcumin bioactivity. Therefore, curcumin delivery ideally requires a method that allows effective dispersion throughout the body while retaining curcumin's natural bioactivity.

### Nanotechnology advancements

Recent studies are tackling this issue of bioavailability using nanotechnology. Researchers at the UC Davis School of Veterinary Medicine have utilized nanocurcumin preparations encapsulated by liposomes (Lipocurc™).

While liposomes remain insoluble in the blood, this method provides a way to transport curcumin and protect bioactivity as it travels throughout the body. From a clinical perspective, these microscopic vesicles effectively suppress chronic inflammation and tumor development in cases of canine metastatic neoplasia *in vitro* and *in vivo*.



The utility of curcumin nanoparticles is also being applied to models of Feline Infectious Peritonitis (FIP). Studies show decreased expression of inflammatory markers associated with FIP by using a soluble sugar polymer (chitosan) to package curcumin into nanoparticles. In addition, ingestion of these chitosan-curcumin nanoparticles increased the levels of circulating curcumin plasma concentrations, thus improving bioavailability compared to curcumin in its free form.

### Indirectly benefiting pets

In addition to curcumin being used for disease treatment, it can also indirectly benefit pets by improving their diet. For example, fatty acids – which are an essential part of the macronutrient and micronutrient balance in a complete diet for dogs – are prone to oxidative damage, leading to rancidity and significant health concerns. A recent study published in *Archives of Animal Nutrition* investigated the role of curcumin in protecting against rancidity in extruded commercial dog food. After six months of

storage, adding 32.9 mg/kg of curcumin reduced protein oxidation and lipid peroxidation in kibble food samples, thus increasing the antioxidant capacity of the diet.

### The need for further investigation

The future of curcumin in veterinary medicine is promising, but further investigation is needed to understand how this nutraceutical can best be utilized. Care should also be taken to monitor for potential adverse effects and complications. For example, some studies have noted that intravenous (IV) administration of curcumin induces acute hemolysis in beagles and is potentially mediated through interactions with iron.

Now that the spotlight is on curcumin, it is necessary to continue to gain more knowledge about this superfood in the context of pet health. ♦



**Ashkan Sadri**  
Veterinary researcher  
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# Herbs that calm and soothe

## Which herbs with calming effects are safe and effective for pets?

Herbs have been an abundant medical resource since ancient times, and a huge body of knowledge has been amassed on their methods of extraction and use in both humans and animals.

### Scarce scientific data

Some herbs with calming effects have been proven to be safe for animals, whereas others are known to be toxic to them. For many herbs that are traditionally known for their calming and sedative actions, however, there is a considerable lack of scientific data about their efficacy and safety for pets. Likewise, a herb regarded as toxic may not be harmful in small quantities; the toxicity depends on the amount of the herb ingested.

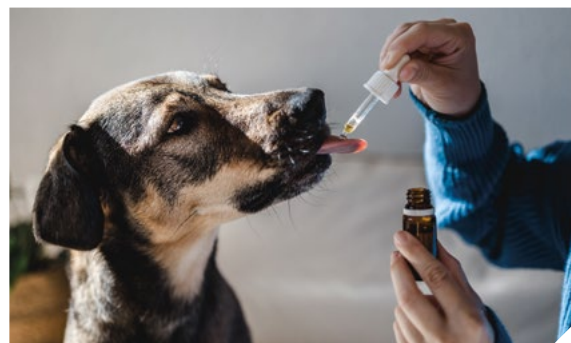
### Herbs regarded as safe

The herbs valerian (*Valeriana officinalis*), purple passionflower (*Passiflora incarnata*) and lemon balm (*Melissa officinalis*) are considered safe and are widely used for their calming properties.

Valerian root is rich in valepotriates, which are the main sedative components, and also in actinidine – a cat attractant similar to nepetalactone, which is the active compound found in catnip (*Nepeta cataria*). Valerian is available in various dosage forms, such as tea, powder, tablets, capsules and drops. Meanwhile, the main anxiolytic components in passionflower are considered to be flavonoids like chrysin. Liquid extracts are prepared from all parts of the passionflower:

flowers, stems and leaves. Both of these herbs are used to relieve anxiety, insomnia and even to control seizures. Lemon balm is known to have antimicrobial, antiparasitic and sedative properties. Its leaves are used to prepare infusions (tea) and liquid extracts.

The safety of valerian and purple passionflower was studied in a preclinical study in dogs, both acutely and chronically, for 180 days. There were no observed adverse effects of their use, so they are regarded as safe. Nonetheless, it would be useful to have more clinical data on their efficacy – such as the dose and the dosage regimen for standardized extracts to achieve adequate sedation. Interestingly, while lemon balm is regarded as being safe for use in animals, only its antimicrobial and antiparasitic actions have been studied in dogs (mostly in combinations with other essential oils). Its sedative effect was actually only confirmed in rodents.





### Potentially dangerous herbs for pets

Perhaps surprisingly, chamomile (*Chamaemelum nobile*) is less safe for dogs and cats, since its components – volatile oil bisabolol, chamazulene, anethemic and tannic acid – can cause poisoning. According to the American Society for the Prevention of Cruelty to Animals (ASPCA), symptoms include contact dermatitis, allergic reactions, vomiting, diarrhea and anorexia, while long-term use can lead to bleeding tendencies.

Another sedative plant called *Humulus lupulus* can cause a dangerous increase in the body temperature of pets, along with panting, increased heart rate and digestive disturbances. Its flowers, which are known as hops, are used as a flavoring and stability agent in beer. And while lavender (*Lavendula angustifolia*) is widely used in aromatherapy for humans thanks to its soothing scent, its active chemical components – linalool and linalyl acetate – can cause nausea and inappetence in dogs and cats.

### Unexplored by modern science

Numerous calming herbs are still unexplored by modern science from a pet perspective. For example, leaves of bastard balm (*Melittis melissophyllum*) and sweet chestnut (*Castanea sativa*) are traditionally regarded as effective and non-toxic. Nonetheless, studies are quite scarce, so this could be an interesting opportunity from both a scientific and a commercial perspective.

And even if a herb is regarded as safe, it is still wise to be prudent. Therefore, when considering herbal options for their pets, owners should check with veterinarians whether the herbs are safe or toxic in their specific situation. ♦



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# The overlooked benefits of fruit in pet food

**It is common knowledge that fruit should be an essential part of human nutrition, but does the same rule apply to pets' diets?**

While fruit is known for being tasty and rich in vitamins and minerals, its biggest value lies in its flavonoid compounds. Flavonoids are the most common group of plant polyphenols, and more than 5,000 different types have been described so far. Besides being responsible for much of the flavor and color in fruit, flavonoids support fruit growth and provide defense against negative environmental influences. Their benefits include potent antioxidant and free-radical scavenging properties.

## Blueberries and cranberries

Blueberries and cranberries are thought to offer potential health benefits through their resveratrol component. Researchers believe that blueberry flavonoids can aid the repair of damaged DNA and help to preserve and repair cell membranes. Blueberries have been proven to elevate antioxidant status in sled dogs.

## Fruit fiber and pomace

The benefit of fruit fiber and pomace (the solid remains of fruit after processing into juice or puree) is often overlooked. Fruit fiber generally contains more pectin and hemicellulose than cellulose, meaning it provides a more balanced ratio of soluble to insoluble fiber, which is important for hindgut health and microbiota fermentation. Additionally, fruit-based pomace has good water-binding properties. This has proven beneficial when high water content is required in food while achieving low water activity and firm texture.

## Research gap

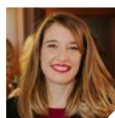
Although the use of fruit extracts and fruit fiber in animal nutrition is receiving more attention, there are

still too few studies related to their potential to exhibit health benefits. Likewise, only a limited number of studies have showcased the potential positive effects of fruit fiber in promoting health and hindgut microbiota in pets. This is because naturally occurring compounds such as flavonoids are variable and hard to standardize, meaning that science can sometimes struggle to prove a certain mechanism of action or pathway.

Additionally, different flavonoids often act through synergistic effects, i.e. one flavonoid action complements the other. Moreover, the effect is often dose-dependent, and 'more' does not always equal 'better'. In fact, high inclusion of a certain flavonoid compound may negatively influence nutrient digestibility.

## Toxicity

Last but not least, it is important to bear in mind that some fruits are also known for antinutritional factors – such as cyanogenic glycosides – in animals. A good example is cyanide toxicity when it comes to fruit pits and kernels from the *Prunus* species: cherry, apricot, plum, peach and apple. While grape toxicity is also known to be detrimental in dogs, the direct cause of nephrotoxicity is yet to be determined. ♦



**Dr. Diana Brozić**  
Assistant professor at the University of Zagreb, Croatia





# Global pet industry

Sustainability is now, more than ever, at the top of the agenda. But are companies actually taking steps towards sustainability? Or is it mainly greenwashing? And what about local sourcing and other supply chain issues? A survey tells us how consumers feel about these topics. Finally, you'll discover how retail is changing and where the opportunities lie for you.

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# Survey results

## How sustainability-conscious are pet parents?

A recent survey conducted by Yummypets reveals that cat and dog owners are eager to purchase products that contribute to a greener environment. But not all of them are happy to pay more.

More than half of the respondents to the Yummypets survey (52.2%) admit that they 'sometimes' look up how sustainable a company is before buying products. Interestingly, no less than 62.2% of French pet owners do so, followed by Canadians (51.7%) and Belgians (50.2%).

On the other hand, 4 out of 10 American pet owners don't do any prior research of the brand, with British owners coming in second place with 34.5%.

### Paying for sustainability?

As to the importance of whether a product is manufactured by a sustainable company: nearly 22% of all respondents agreed this is very important, while 30.6% believe it is 'fairly' important, but not decisive. For 5.7% of respondents, this aspect is not important at all.

More companies within the industry aim to become carbon neutral. Yet only a minority of pet owners are willing to pay more for sustainably produced products. 37.8% of French pet parents and 35.4% of British would be willing to pay more, compared to only 24% of Americans.

Owners are also sensitive to environmentally friendly packaging. British (37.8%) and French (37.3%) are the most eager to pay more for products presented in paper or recyclable packaging, followed by Americans (34.9%) and Belgians (33.2%). At the same time, 5.7% of all respondents would not pay more for sustainable packaging.

### Organic and sustainable labels

Half of the respondents admit looking out for organic labels – such as USDA Organic, B Corp or Ecocert – when purchasing pet food. A significant 63.6% of pet owners buy organic food for themselves.

Belgians (57.7%) and French (57.1%) are leading where organic is concerned. Whereas nearly 4 out of 10 British say they are not interested in organic alternatives.

The survey concludes that no less than 41.7% of pet owners are skeptical about sustainability claims made by pet food companies (29.6% believe such claims). French (48.5%) and American (43.3%) pet owners are the most skeptical.





Interestingly, 28% of pet owners consider it important that companies within the industry actively support animal shelters or adoption programs.

### Nutrients as a core solution for sustainability

When asked about alternative and sustainable protein sources in pet food, owners consider eggs (22.1%) and plant-derived proteins (21.5%) as key drivers.

The concept of insects as a source of protein is increasingly popular in some markets. Although uptake amongst pet owners still seems low: 13.7% of them do not consider insects to be a sustainable alternative. US and Canadian owners are the most skeptical towards insects, while Belgians and Brits are the strongest believers.

Only 12.8% of respondents say they have purchased insect-containing pet food. Of those who haven't yet purchased it, 48.7% are open to doing so, while 38.6% are against.

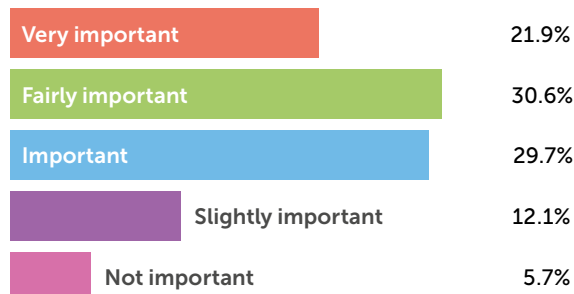
### Buying local is preferred

Locally sourced ingredients are also seen as a core issue: 3 out of 10 pet parents would certainly buy this kind of product. While most Belgians (66%) see locally sourced as a priority in their purchasing choice.

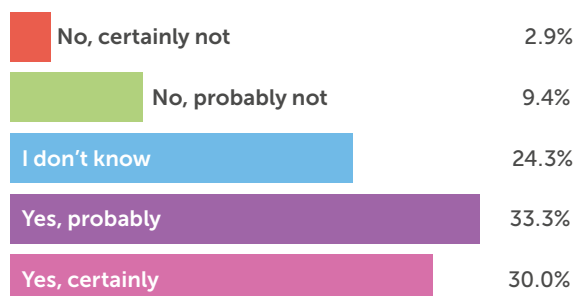
As for buying locally, more than half (57.1%) of respondents buy locally sometimes, whereas 31.3% always buy locally. British (39.6%) are the ones that are more committed to local stores, followed by Americans (35.3%), Canadians (34.8%), French (25.7%) and Belgians (19.4%).

When it comes to paying more for pet products with ingredients that are sourced locally, the majority (63.3%) are open to or in favor of this idea. In general, consumers from France and Belgium are most willing to dig a little deeper into their wallets, while Canadians are much less likely to do so. ♦

### 'Is it important to you that a product is manufactured by an environmentally friendly company?'



### 'If the nutritional value is the same for two products, would you be willing to pay more if the packaging were more environmentally friendly? (paper vs. plastic, recyclable)'



A total of 1,568 pet owners from Belgium, Canada, France, the UK and the US responded to the survey.

Special thanks to *Yummypets*



**David Palacios Rubio**  
Editorial Manager GlobalPETS  
globalpetindustry.com



# Already green or still greenwashing?

**The line between real sustainability in a company and fig leaf campaigns for marketing is often blurred. How can a brand really do good and talk about it authentically?**

Consumers increasingly base their purchasing decisions on the values of a brand, and much less on the (often interchangeable) products themselves. Although sustainability is usually not the deciding factor in purchasing a product, by emphasizing the value of 'sustainability' in its marketing, a company can score a few extra points in its favor.

## What to focus on?

Every end customer sets different priorities: climate protection, animal welfare, packaging, or the health megatrend. The art for the brand lies in balancing what is appealing to the customer and the effect on the environment. For the best value, brands try to find what benefits both the most. However, this often makes the product expensive or even impossible to sell.

For example, if a brand decides to focus on significantly reducing animal suffering, it would need to source 100% of its meat from sustainable, cruelty-free sources. Although expensive, it is a feasible solution that allows a brand to back up its claims of reducing animal suffering.

Or if brands focus on climate protection, they should be aware of the 'purchase' of CO<sub>2</sub> emissions right across the supply chain: starting with raw materials

and pre-products. This means that, if the brand in the supply chain lowers the ecological footprint through a clever selection of local ingredients (for instance, potato instead of sweet potato) or more energy-extensive production processes (gentle air-drying instead of freeze-drying), then the environment is helped more than by (also sensible) waste separation in the canteen.

What this teaches us is that it is important to have a holistic point-of-view regarding the business model. If, for example, the entire business is based on meat-containing products, it is simply not credible to advertise the low carbon footprint of the one or two vegan products in the product range and claim to be a low carbon-emitting company.

## When does greenwashing begin?

When making a purchasing decision, consumers will always balance different values. In case a consumer values both health and climate, they might consider feeding their dog a vegan diet.

In such a case, simply assessing the brand for the authenticity of its messaging and stringency in execution makes the choice for a product easy for consumers. It can be even easier for the consumer



*For the consumer, it is not a simple task to decipher what is truly sustainable.*

if a brand is fully committed to enabling a vegan dog diet. Trusting such a brand and considering it as being more justified, comes naturally for the consumer who can safely assume this brand fits his needs.

But once you start looking for the answer to the question as to how brands should balance advertising claims with the ingredients they use and advertise, it can quickly get much more complicated.

### Tricky

For example, using by-product meat is not much worse than using poultry products in terms of carbon footprint. But it gets tricky in advertising or packaging. Using images of lean meat – like a steak – signals that the product relies on ‘clean’ ingredients and hence is more attractive to the consumer. Yet, it also means the use of ingredients with a higher carbon footprint.

Without regulations, it is up to the manufacturer how to balance this. And for the consumer, it is not a simple task to decipher what is truly sustainable.

### Informed decisions

An independent label or award for product sustainability in the pet food sector would make it much easier for consumers to make an informed decision. And it would put brands that are advertised as climate-neutral or even climate-positive to the test.

At the end of the day, it is the pet owner who decides. And brands beware! Lies have short legs. ♦



**Klaus Wagner**  
Sustainability expert in pet food  
greenologe.de

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# The next step in your sustainability efforts?

## Is it time to take your sustainability efforts even more seriously and get pet-industry-specific accreditation?

The United Nations Sustainable Development Goals (SDGs) are expected to create at least \$12 trillion (€10.61T) of market opportunity by 2030. Further, several global surveys highlight the increasing number of companies that are aligning their impact reporting to the SDGs.

### Opportunity

A 2019 report by Oxfam found that 62% of responding companies have public commitments to progress on the SDGs, and another found that out of 250 companies, 82% report on them. It was also found that most companies prioritize a select few of the goals that best align with their business models.

It was in recognition of this market and planetary impact opportunity that the Pet Sustainability Coalition (PSC) developed the first, and only, pet-industry-specific accreditation for sustainability.

### Partnering for progress

In partnership with BLab, PSC uses the SDG Action Manager Assessment to have companies assess the impact of their business operations, with all companies

completing the baseline assessment, as well as their choice of at least two other goals.

The flexibility in assessment allows companies to focus on the areas of impact that best align with their business model, amplifying their positive impact in those key areas. Companies undergo a third-party desk audit to verify their assessment. The audit focuses on issues prioritized by PSC, related to responsible sourcing, economic well-being for stakeholders, and monitoring and reduction in the use of resources. Upon completion of the audit, companies meet a minimum score and commit to annual improvement to achieve accredited status.

### How accreditation can help your business

The coalition is comprised of hundreds of members spanning retailers, distributors, manufacturers, suppliers, and brands. PSC fosters relationships with media partners, certifying agencies, sustainability experts, and more. Leveraging those relationships in the promotion of businesses that commit to continuous improvement through the accreditation program is a key focus.

[▶ SEE NEXT PAGE](#)

## Key benefits

Key benefits of accreditation are:

- **Establish credibility with employees**  
Show your employees that you take sustainability seriously. Engage them in a process that makes it real.
- **Attract the best talent**  
Job seekers at every level are looking for employers that demonstrate a commitment to having a positive impact.
- **Stand out at marketing and sales events**  
Recognition for sustainability at pet industry events and trade shows. Top performers earn placement in PSC booths.
- **Premiere placement at Pet Sustainability Coalition events**  
Accredited businesses receive the first option for sponsorships as well as special placement and recognition at industry-wide conferences and webinars.

- **Gain rights to the accreditation badge**  
When your company earns Pet Sustainability Accreditation, you get to sport the accreditation stamp. The badge sits next to your company's name at select trade shows and online events and can be used in your marketing materials.
- **Media exposure**  
Earn spotlights at virtual events, be recognized in PSC's partners' publications, and be considered for Accreditation Awards. ♦

To learn more about becoming accredited please contact the Accreditation Manager at [accreditation@petsustainability.org](mailto:accreditation@petsustainability.org) or visit [petsustainability.org/psc-accreditation/](https://petsustainability.org/psc-accreditation/)



**Ashley Lane**  
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at Pet Sustainability Coalition  
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# Are challenging times coming for the pet industry in 2022?

**Pet industry growth is not cycle-dependent. The durability of the industry is worn as a badge of honor by its many participants. Yet, we're facing a more powerful maxim that may test this theory: you cannot sell what you don't have, and people cannot buy what they can't afford.**

COVID-19 has created a set of societal challenges that have both accelerated and constrained the pet industry. While the pandemic may have further underlined the human-animal bond, it has constrained our access to shopping channels and products. It has also taken a substantial toll on the income of the middle class, who make up the bulk of pet ownership and pet purchases. With COVID variants continuing to impact our lives, the potential for a longer period of constraints is evident.

## Sourcing from elsewhere

While the US pet market has seen a significant shift towards domestic manufacturing, it remains the case that many segments of the product market are dependent on foreign-sourced goods.

Goods from China, already more expensive due to tariff escalations between 2018 and 2019, face further headwinds. In October 2021, the Chinese Producer Price Index – a measurement over time in the selling prices received by domestic producers for their

products – increased by 13.5%. The fastest pace of increase in 26 years.

On top of this, the cost of transporting goods from East Asia to US ports has increased over 400% in the past year, according to the Freightos Baltic Index. But it does not end there! Goods typically face long wait times to be unloaded. After unloading, goods are trucked to distribution points at per-mile costs that – according to freight service provider C.H. Robinson – have increased 150% on average, depending on the market and modality.

Longer lead times have led to increased utilization of air freight, but this is costly. Countries that we often think of as alternatives to China sourcing – including Vietnam, Cambodia, Brazil, India – offer no easy solution, as their labor forces and supply chains have been ravaged by COVID-19. The net result is fill rates have plummeted, even for the best-performing companies. And retailers, physical or virtual, cannot sell what they don't have. [▶ SEE NEXT PAGE](#)

## Local production

Domestic production has faced its own challenges. Starved for human capital, faced with input cost inflation and shortages, and constrained by workforce density restrictions, manufacturers are navigating a challenging landscape.

While US government data suggest non-farm labor productivity grew 2.0% in 2020, unit labor costs increased 4.5%. Through the first three quarters of 2021, productivity was up 1.7% while unit labor costs increased 6.6%. What this boils down to is that more is being paid per unit produced than pre-COVID-19.

Since most manufacturers do not operate on a cost-plus basis, this means that as input costs increase there is a lag before such increased costs can be passed on to customers. Domestic manufacturers subsequently face the same route to market issues as imported products post-port.

## Ability to pay

The other side of the coin is the ability to pay. US unemployment has declined markedly since the early pandemic period. An estimated 9.6 million jobs have been lost in the pandemic, according to Pew Research. The World Economic Forum estimates 114 million jobs were lost globally, costing workers €3.26 trillion (\$3.7T) in income. The US Labor Participation Rate is hovering at 62%, which is equivalent to the prevailing rates in 1977.

While wage growth has increased an incremental 5% in 2021, the Consumer Price Index increased 6.8% in the last 12 months through November 2021, wiping out all of these gains. Further, pet category inflation, both products and services, has lagged the broader Consumer Price Index year to date. However, marketers can no longer hold back on passing these increases through to the end customer, which will eat of a larger percentage of their income going forward.

When grain-free dog food arrived in the US market, the idea that consumers would pay twice as much for kibble was met with intellectual resistance. Then the dog moved out of the backyard and into the house and then on to the bed. Today, a US consumer has a myriad of options to purchase dog food at €8.8 per kilo (\$10), more than double the price of ultra-premium in 2012. Yet, pet ownership in the US has meaningfully transitioned from older generations, with considerable stored wealth, to younger generations, with less access to resources and means of economic gain outside of income.

## Challenging times?

The net result is that market dynamics are colliding – supply is constrained, costs will continue to rise, but the ability to pay is falling behind. The sum of all these circumstances creates the potential for the category's performance track record to be tested. This confluence of factors is creating commercial opportunities for innovative pet food brands to capitalize on designing precision products for specific health-enhancing purposes in pets.

Have you devoted enough focus on your present business to leverage discoveries from the microbiome field into your pet products? This is a rapidly advancing and expanding scientific field that will differentiate products and brands. ♦



**Bryan Jaffe**

Managing Director Food, Beverage & Agribusiness at Cascadia Capital LLC  
cascadiacapital.com

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# How to create compelling retail experiences – when retail is everywhere and nowhere

**'Retail' is becoming increasingly complex and fuzzy. In a way, retail is everything and nothing.**

Retail is everywhere, as anyone can now be a retailer – retailers, the producers, even influencers. The level of competition is enormous, and it's hard to know how to create competitive advantage.

At the same time, retail can now take place everywhere, as it can be embedded into everything – an Instagram image, personalized meal plans, live streams and more. This means retail actually is all about EXPERIENCE, or rather: sales equals creating a more engaging experience.

This 'everything and nothing' marketplace can make brands unsure of where to start, or what to do next.

## Onion skin framework

To turn complexity into clarity, Insider Trends developed the 'onion skin' framework (see image). Several clients have used it to clarify what to communicate across complex, multi-stakeholder, omnichannel ecosystems.

It helps retailers put the most important things first, and not worry about channels until much later in the process.



Use it by starting at the center and move outwards from there. By defining one layer, you'll know what needs to be done in the next layer.

## Customer first

Every business talks about being customer-centric. To truly be customer-centric, we need to take this literally and place the customer at the heart of what we do. We need to start this process by understanding the customer.

There are some crazily successful brands that, on the surface, seem to offer similar experiences as their competitors. There's one key difference though – the successful brands understand their customers better. Much better.

Their secret seems to lie in a tailor-made approach in everything they do. These brands know their customers – inside out – and know why customers choose them above other brands.

Below are three key questions that you should know the answer to, in order to gain the competitive edge you're looking for.

- Who are your customers?
- What media do they use: Instagram, YouTube, e-mail or print?

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The active ingredients of Dermaprotect reduce excessive shedding, dandruff and encourage hair regrowth and a shiny coat. Lasting deodorizing effect. Soothes irritated skin. Natural protection against bacteria, fungi and external parasites.

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- What other brands do they purchase and how do these brands set their expectations?

Finding answers to these questions will help you know where you need to be. In doing so, think way beyond the realms of pet food, to every brand and interaction your customers might have. For example, if they're an Uber customer, they may expect one-click ordering and payment. If they're Peloton users, they may expect personalized combinations and packages.

And remember: if you're ever in doubt about who your customers are or what they want, just ask them! Run a poll on social media, invite feedback in the comments, or chat to them in your stores. In addition to getting crucial insights, customers will feel more engaged – they'll see that you're shaping the brand around them, in response to their needs and requirements.

### Fine-tuning your brand

Once you're clear on who the customer is and what they want, you can establish which aspects of your brand will best appeal to these customers.

The leading brands have a handful of clear, strong values that they express across all channels. Lush's values boil down to 2 strong characteristics: 1) fun and 2) ethics. Customers can feel and experience these across every touchpoint and brand experience. It makes the Lush brand experience consistent and compelling, wherever the customer interacts.

Don't be afraid to let your personality show when defining these values, and steer away from listing out vague corporate values such as 'excellence' or 'responsibility'. You need 2 to 3 values that cut through complexity. Scrap values that muddy the waters further.

### Reaching the customers at all touchpoints in the ecosystem

Having clarified what you want to express, it's time to express it – clearly and across all channels.

And the more you weave channels together, the more you win. Please note that this is about much more than

buying online and in-store pick-up. Real engagement at all touchpoints also means you learn about individual customers in-store, so you can tailor digital and in-store pick-up experiences and communications to their needs. Or ensuring you can fulfill livestream orders from the customer's local store, so they can have their purchase in hand in 20 minutes. Or rewarding the customers who engage with you most online and offline with exclusive experiences, delivered offline and online.

Brands' omnichannel journeys have only just begun – there's so much more that can evolve, to the benefit of brands and customers.

### Rethinking the customer experience

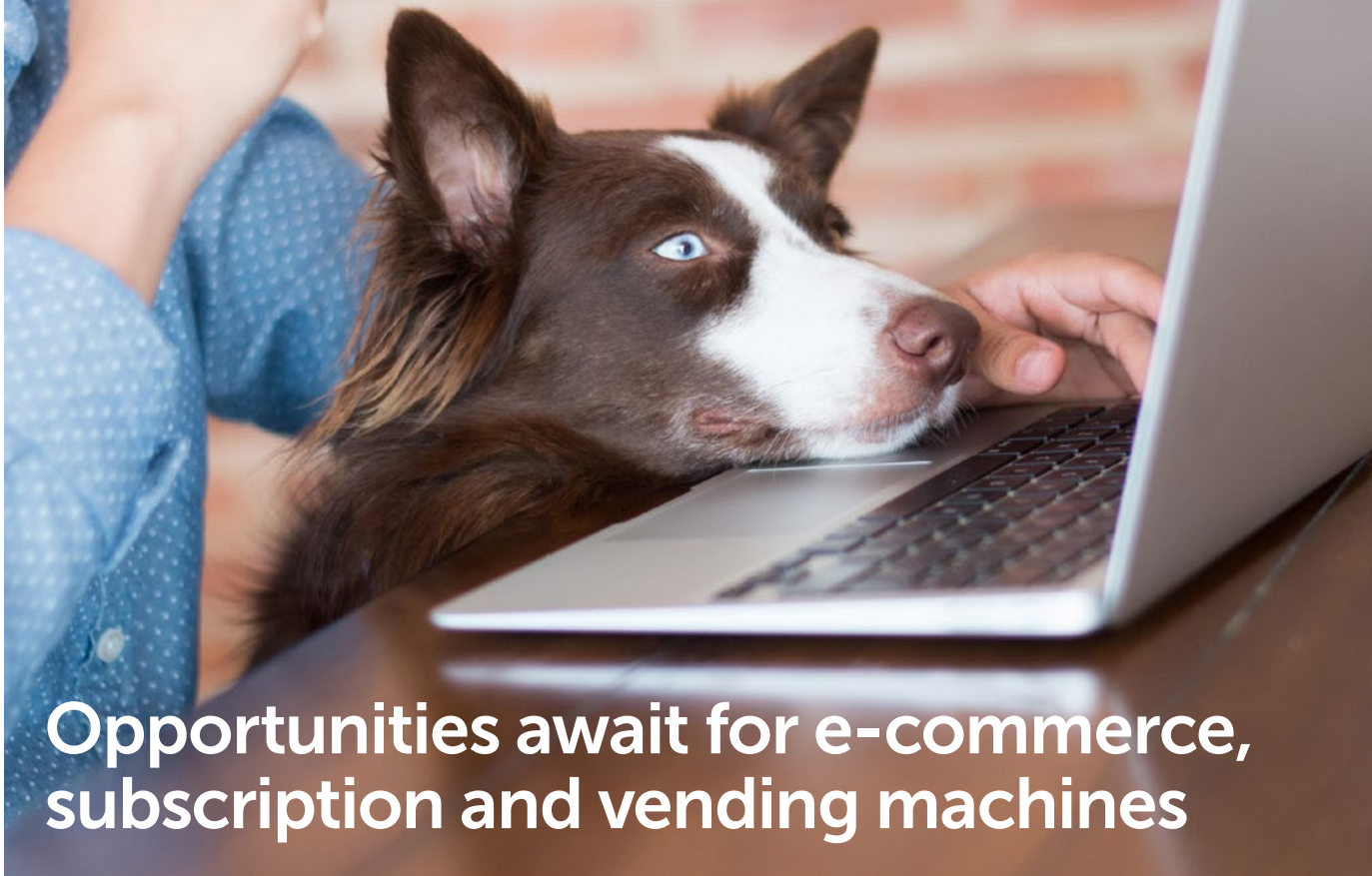
The last step is to optimize each experience in each channel, so that it's as satisfying as can be. Many leading companies are rethinking the experience offered in various channels. For example, Enjoy is a delivery company that delivers the sales experience: a salesperson visits the customer's house, discusses possible purchases and leaves them with their choice of product.

Another excellent example is the Boohoo app: it doesn't just sell activewear to customers, it lets customers track their fitness activity, earning discounts and rewards in exchange for exercising more. Many more websites are realizing that, alongside shoppable content, engaging written and video content should be provided, to entertain customers, keep them coming back, build relationships and ultimately sell more. ♦

Eager to learn more about this framework? Cate Trotter will be presenting it at the upcoming GlobalPETS Forum. Join her there and see how world-leading brands are successfully creating compelling multi-channel retail experiences.



**Cate Trotter**  
Head of Trends at Insider Trends  
insider-trends.com



# Opportunities await for e-commerce, subscription and vending machines

**The rising number of alternative sales channels for traditional stone-and-mortar shops, largely as a result of the COVID-19 pandemic, is changing the way in which pet parents purchase goods for their animals.**

Although still early days yet, in recent years pet products subscription services have flourished. Already, several companies, including WufWuf and Tails.com, are experiencing high growth levels.

## Opportunity to grow subscription trends

Subscription services have benefited from a significant rise in the already existing, pre-pandemic demand for convenience, as well as potential cost savings. This together with the shift to e-commerce and a significant growth in the number of pet parents – both being direct results of the lockdown – means a major impetus for online services.

Whereas this shift offers new opportunities for online sales channels, both in increased uptake and in expanding subscriptions into an all-encompassing service, traditional supply chains stand to be impacted even further.

THE PACK is a plant-based dog food start-up offering a subscription service. The brand offers wet plant-based dog food in three varieties, including No-Fishy Dishy, No-Cluck Casserole and No-Moo Ragu. These

products contain key ingredients such as papaya for healthy digestion, vitamin-rich kale and pea protein for strength. THE PACK promotes its products as planet-friendly, nutritionally balanced and science-based, with happy, healthy dogs as a result. Customers receive a one-off 5% discount if they sign up for a monthly subscription.

## Pet food vending and e-commerce lockers

Pet food vending machines are subject to ongoing innovation from brands: ranging from serving hot food to customizable items. Accessibility features are also constantly being improved, for instance, by enabling access for visually challenged pet parents using Braille. But, importantly, vending machines offer pet owners greater access to a wide variety of pet food items, as well as the convenience of longer opening times.

A similar development is the use of e-commerce lockers. Consumers can collect online orders at flexible times that suit their schedules. In fact, the COVID-19 pandemic catapulted the use of vending machines for pharmacies, who thereby enabled patients to collect prescription medicine 24/7.



In France, supermarket Leclerc Lamballe has installed a vending machine selling private-label pet food in its car park. The vending machine is available 24/7 and sells bulk dry pet food for dogs and cats as well as laying hens. Consumers can choose from multiples of one-kilo pack sizes (2.2 pounds) priced at €2.45 (\$2.80) per kilo for dog food and €2.95 (\$3.37) per kilo for cat food. This equals savings of 25% and 18% compared to the two-kilo bags sold in-store. The vending machine accepts contactless payments only.

### Keeping pet owners informed and engaged via tips

Besides the convenience of online channels for pitching new products and services, pet food producers and retailers can also use online to provide pet owners with useful information. For instance, on how to keep their pets in good health and shape. This could even stimulate pet owners to visit a brand's social media channels for tips. This, in turn, opens up the opportunity for retailers to act as a source of information, providing guidance to pet owners in purchases that support their pet's well-being. Pet retailer Global Pet Foods runs a series on social media called #TipTuesday, appropriately providing owners with tips for their pets.

### Local sourcing

Across the globe, pet owners are seeking locally sourced and made products, as they look to support their local economies.

In Latin America, Nufit Premium Food for Puppies contains amaranth and nopal grown by Mexican farmers, thus supporting domestic trade. Meanwhile, Naturalistic Maqui Cookies for Dogs from Chile are human-grade, grain-free and made with real fruit and protein. The next step will be for retailers to connect local sourcing with low-carbon emissions, and in doing so meet the needs of climate-savvy consumers.

### Dogs as appreciated guests in cafés and restaurants

Although often welcome to join their pet parents in bars, cafés or restaurants, any potential dog menu usually features no more than a bowl of water. Not much longer! Innovative F&D concepts aimed at pets are helping the hospitality industry transition, from accommodating pets to considering them as real customers who would also like something tasty to eat or drink.

In Brazil, beer brewer Colorado launched Cãolorado: a meat-flavored dog beer. This non-alcoholic mixed drink contains blue hops and is retailed in a 269 ml can bearing the seal of the Brazilian Ministry of Agriculture. Colombian brewery Bruder offers clients to the brewery a Dog Lover pack that features two beers, a treat and a water bottle, with a portion of the sales price going to an NGO. Burger King Brazil's Dogpper is a grilled meat-flavored dog cookie.

### New stone-and-mortar concepts

The redirection of demand to online has required retailers with a store presence to do more to entice customers to their premises. Alongside traditional avenues, such as boosting staff expertise and new pet services, other interesting new initiatives have also been undertaken by store owners over the past 18 months.

In the UK, for example, Pets at Home started trialing dedicated recycling points for flexible pet food packaging. In August 2021 they launched this service in 40 of their stores nationwide, thereby tapping into mounting interest in sustainability. Beyond this, wholly new concepts are also being tried and tested, including pop-up stores and even pet food halls. ♦



**Amanda Lintott**  
PR Manager at Mintel  
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# Spain and Portugal

As a key market in Europe, Spain has seen tremendous growth during COVID. Although Portugal is smaller, this pet-loving country is on an equally exciting trajectory. You'll hear firsthand from local retailers in both Spain and Portugal how they feel about the market and what they're up to.

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# Leading pet retailer doubles down on building an ecosystem



**IskayPet believes that offering a complete Pet care solution through a wide range of products both in stores and online, as well as services through its veterinary centers and grooming salons, is the future of its business in Iberia.**

Until 9 months ago, Marcos Ruao (photo) was Managing Director of FNAC Iberia, with a background in logistics and e-commerce. Now he is the CEO of IskayPet Group, one of the fastest-growing Iberian pet retailers.

## Living apart together

IskayPet was formed out of a merger between 2 similarly sized pet ecosystems, Kiwoko and Tiendanimal. Although integration of the operating systems of the 2 retail brands is underway, Ruao intends to keep both brands active since the overlap in customers is less than 15%.

Kiwoko with more than 150 stores and a multi-pet approach is more focused on the experience, and sells live animals. Tiendanimal started as an online player in 2006, before entering retail in 2015 and now has around 70 stores. It is more value-for-money focused, selling high-quality products at the best possible price.

## Not changing a winning team

“The 2 companies are gradually becoming one as far as culture and processes are concerned. But our brands will remain separate because they target different parts of the market, and they are number 1 and number 2 in the country. If we were to get rid of either of the brand names, we would definitely lose customers,” Ruao says.

## Growing fast

In Spain, there are 29 million pets, with many more dogs than cats. The small dog segment is growing, but the cat segment is growing even more rapidly. About 40% of all households are pet parents.

The Spanish pet industry is worth around €2 billion (\$2.26B) and employs around 200,000 people directly or indirectly. The IskayPet Group has more than 220 stores in Iberia, and its revenue was just over €300 million (\$338M) in 2020. The company's revenue in Spain grew faster than the national average in the first half of 2021, so it is gaining market share. By the end of last year, it had achieved double-digit growth.

## Pet ecosystem

IskayPet very much believes in the future of the pet ecosystem – with a holistic offer that creates more opportunities to retain customers.

IskayPet opened 25 stores in 2021. The plan is to open around 40 new stores every year, with the aim of having some 400 retail units by the end of 2025. These stores will operate alongside the grooming and veterinary services provided by IskayPet.



There are 2 separate brands of veterinary clinics in existence, with 70 located close to the stores. Half of the Kiwoko and Tiendanimal stores provide grooming services.

### Making it easy for the customer

All these services are important to the IskayPet customer, as Ruao points out: "By offering pet care services along with all the necessary pet care products, we hope that people who usually buy in grocery stores will be attracted to our ecosystem and then – if we do our job well – become regular loyal customers."

### It all revolves around omnichannel

Retail and online are growing at the same pace, reflecting IskayPet's store network expansion. 20% of sales now come from online, but omnichannel purchases involving more than one type of touch point being used by one consumer are growing faster than either online or physical retail sales separately.

Ruao believes this reflects customer demand and spending patterns, saying: "The idea before was that pure online players are really great when it comes to convenience. But that's no longer the case. You have to be at home, waiting for the delivery, which isn't convenient. Customers love the convenience of buying something online and going to the store in an hour to pick it up."



He continues: "So even though e-commerce is a major source of growth, it must be part of an overall omnichannel retail concept. Physical and digital channels combined. There shouldn't be a distinction between products and services, as they're all part of a complete offering. Every cent invested in digital is going toward omnichannel at the same time."

### Seeking organic growth

IskayPet intends to achieve its expansion plans via organic growth rather than any further acquisitions. Ruao states: "We're not against acquiring smaller players, but that is not the focus. There is no real need for consolidation in the market. The industry keeps growing, so smaller players will still be able to have a comfortable position too. It's often too expensive to acquire smaller players when things are going well."

### Winning combination

Long-term plans will always rely on in-depth knowledge of a company's consumer base, and this is no different for IskayPet. Being able to recognize exactly what the customer wants, and tailoring what you have to offer to each specific market, particularly in terms of service and speed, is the key to success. This retailer's ability to combine physical retail and online facilities could well prove to be a winning combination in its part of the world. ♦



**Philippe Vanderhoydonck**  
Managing Director  
GlobalPETS



# Serving the customer when they want, where they want

**Buddy has a big ambition. Not to become the largest pet retailer in southern Europe, but to be the best.**

Buddy is a recent arrival on the Iberian peninsula's pet retail scene. It was born in 2020 through the merger of 2 companies: retailer Miscota (formerly Maskokotas) and e-commerce company Pet Care Retail Group (Petness, Animalear, and Vetality). Buddy has grown rapidly within a short time. In 2020, it had just 45 stores. During 2021, the retail chain expanded to 73 stores, and it is projected to have 150 stores by the end of 2022. This will include its first stores in Italy.

The Buddy e-commerce stores get over 20 million visits, supplying products to more than 140 countries worldwide from warehouses in Spain and Portugal. The 2 retail channels have a total turnover of around €60 million (\$68M), with revenue growing at 30% annually over the past 3 years.

## Knowing your consumer persona

Ignacio Serrat became general manager of Buddy in July 2021, having worked extensively at Nike in different geographies. His last role there was as VP General

Manager for EMEA South. He believes his background will prove invaluable in his new position at Buddy. The digital acceleration and omnichannel transformations that he's seeing now at the pet retailer are similar to what he experienced in the sports industry.

The lessons he learned at Nike are equally applicable to the pet retailing sector. "There is the same need to develop a business that is very consumer-centric – serving the customer day in, day out – and to know every detail of your consumer persona."

## Truly omnichannel

At Buddy, 60% of revenue currently comes from online sales and 40% from retail. As its number of stores grows, Serrat believes that it will be 50-50 by the end of 2022.

Serrat regards e-commerce as a major source of growth, as part of an overall omnichannel retail concept. He says: "Omnichannel capabilities enable





a pet retailer to serve the customer when they want and where they want. But this means more than just providing online retailing.”

He goes on to say: “Lots of companies claim they have a strong omnichannel approach. But for many, that just means launching an e-commerce website. Because of the merger of the 2 companies, both e-commerce and retail are at the heart of Buddy. We have a large IT team. We’ve developed our own app and data warehouse so, because of that, we’re one step ahead of the game.”

### Big cities and small neighborhoods

Buddy plans to conquer all the big cities in Spain, Portugal, and Italy by focusing on neighborhoods and connecting with communities. “We will develop an effective omnichannel strategy in those cities, with a digital platform that comes to life in the customer’s own neighborhood,” Serrat says. “Today’s consumer mindset is ‘I want it now – I want it to be easy.’ The Buddy offering will be: click to order, and delivery within 24 hours in the major cities.”

He adds: “Our supply chain partners will make the delivery process even smoother, for example, delivering during specific time slots. With some partners, there will be 2-hour delivery. This requires a lot of investment and organization to make it happen. If you don’t do it right, people will go to another retailer.”



Serrat believes that omnichannel success benefits both the customer and the business, pointing out: “Where we have a physical presence, our digital business grows faster in those cities as well. The familiarity of the experience with the retail stores makes customers trust the brand more. It increases loyalty too. Omnichannel customers are twice as loyal as online-only customers.”

### Digitally led expansion

Outlining Buddy’s long-term plans, Serrat states that the company “will not try to become the biggest, but to be the best.” Over the next 3 years, it wants to become the best player in southern Europe. Buddy aims not just to grow, but also to become more profitable, having learned from the rapid physical growth of previous years. According to Serrat, the company will “focus on opening stores with the best products, services, and experiences. Always digitally led to serve consumers.”

Buddy is planning to open more stores in Spain and is targeting further international expansion with plans to move into Italy, while serving other countries via e-commerce. These growth plans will result in the creation of a company that will pass the €250 million (\$280M) revenue mark within 3 years.

### Successful interaction

Knowing the customer is crucial to ensuring this success, both nationally and internationally, Serrat states: “Our key target market consists of female millennials who live in that omnichannel world. And we want to make sure that every time we interact with a consumer, that interaction is great. This is our definition of success.” ♦



**Philippe Vanderhoydonck**  
Managing Director  
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## Nugape Pet Food SPAIN Improving day by day

Nugape started manufacturing pet food in 2004, becoming the first factory in Galicia to specialize in the production of food for dogs and cats.

Over the years, the plant located in Pontevedra has incorporated state-of-the-art technologies throughout its entire production process. All products are developed following high-quality standards to ensure the best results and optimal palatability.

Together with a large team of highly experienced professionals, the company has been able to meet the demanding nutritional needs of pets in more than 30 countries all over the world.

Regardless of the breed or lifestyle of your dog or cat, you can find food tailored to their needs among the wide array of products manufactured by Nugape.

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# Gastronomic pet food



## Taking nutrition for dogs and cats to a higher level: How an animal lover built a business based on a clear-cut philosophy.

In 2003, Isaac Parés had a vision. He imagined families living a natural, healthy and happy life together with their pets. To make this come true, he would build a business based on product quality, honesty and respect. Gosbi was born.

### Scientific rigor, artisan craft

Always innovating, the company has redefined the cooking process for pet food. And has done this by integrating advanced technology with traditional techniques used for human food – all in order to obtain healthier, safer and tastier pet products.

This year, Gosbi is launching a brand-new concept – gastronomic pet food. The project is a partnership with 5 Michelin Star chef Paco Pérez, who applied the principles of human gastronomy to pet food. Minimally processed human-grade natural ingredients, cooked without any added water, are at the heart of these products.

### Competitive advantage

Every business project aims for excellence. And Gosbi's 5 customized factories all aim to achieve the highest quality in each type of food produced. That is the key to Gosbi's competitive advantage.

In addition, the company has its own digital ecosystem, oriented toward omnichannel and interaction with points of sale. The result is a differentiating offer that strengthens its position in the markets where a brand is introduced.

### Unique B2B approach

Gosbi has become the benchmark in the Spanish market because of the innovative nature of its products and its unique business strategy. The company puts the independent retail channel at the heart of its business, dispensing with the big online players while laying solid foundations for international growth.

The company offers an expansive product portfolio, with more than 200 items to satisfy the needs of any pet shop or veterinary clinic. This ranges from specific products like veterinary diets or food supplements to fast-moving products like snacks or cat litters.

### Family-owned business

In the pet food sector, where investment funds are gaining more and more presence, the fact that Gosbi is a family business explains the unique character of the company. Animal welfare activism has always been a priority. For that reason, it works continuously to find innovative and legitimate ways to develop the business while generating a positive impact on the environment and society. ♦

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Gosbi Petfood, S.A.  
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gosbi.com

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# Celebrating 65 years of expertise

**Tolsa is a Spanish company with a global mission. It is a world leader in the extraction, treatment, and commercialization of minerals, and is specialized in cat litter with its brand Sanicat.**

Active in 95 countries, Tolsa develops applications by extracting, treating, and marketing minerals, and by making good use of all resources that make progress possible. Its mission is to have a positive impact on society by making better use of everything the 21<sup>st</sup> century has to offer.

## Carving new paths

With its sustainable business practices, global vision, and innovative culture, the company is continuously looking at and leading new projects in the markets it works in. One of these is the pet care sector, with Sanicat – a cat litter expert that truly seeks to understand cats and their owners.

## Litter from waste

Tolsa keeps searching for ways to deliver even better Sanicat products. Always listening to its customers, and learning from them, has helped shape and improve the brand as the company creates better

solutions for everyone. That's why Sanicat offers 3 different ranges of cat litter, responding to the varying needs and lifestyles of cats and customers around the world.

There are the Classic and Clumping ranges – each type of litter made from top-quality natural clays and minerals that are highly absorbent. And all based on oxygen odor control technology, which uses the natural power of the oxygenation process to neutralize and decompose unpleasant odors.

The Plant Based range is made from 100% natural and recycled materials repurposed from industrial waste. These products are also biodegradable and compostable.

## Kind to the planet

Sanicat harnesses the power of nature to create litter that is not only kind to paws, but

also to the planet. Its pledge is to reach 0% plastic packaging by using planet-friendly alternatives. So since 2019 Sanicat has been shifting from plastic packaging to fully recyclable and FSC-certified paper bags and cardboard boxes. The company also strives to continuously improve its logistics and business models, so that it can measure and reduce its carbon footprint as well as its social and environmental impact.

Now, more than ever, Sanicat wants to highlight its commitment to helping customers make positive changes in their homes and their lives, while caring for the planet. ♦

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**Tolsa S.A.**  
mserrano@tolsa.com  
tolsa.com

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# Products that reflect the best of Portugal

**Cutting-edge equipment plus an expert team of veterinarians and nutritionists ensure healthy and balanced diets for cats and dogs at very competitive prices.**

petMaxi was set up in 2015 as a pioneering project in the manufacture of premium and super-premium pet food in Portugal. Behind it was a group of companies with over 40 years' experience in animal nutrition.

## Higher Level certification

At its 61,680 sqm facility, including 11,300 sqm of covered area, the company has 2 modern and innovative production lines.

All raw materials and final products are analyzed in modern and well-equipped chemistry and microbiology laboratories to ensure product quality and safety at every stage of manufacturing. The company has had IFS certification since 2017, maintaining the best possible rating 'Higher Level' for the 5<sup>th</sup> consecutive year. This year, it achieved a 98.38% score – even better than last year. This demonstrates greater compliance with the standard's numerous requirements.

petMaxi is a sustainable company and is now implementing the ISO 14001

environmental management system and ISO 50001 energy management system.

## Mediterranean style

Besides manufacturing several private labels, the company produces a wide range of products that perform well in international markets, such as happyOne, happyOne Mediterranean, happyOne Premium, Domus, Campeão, Rufia and EnergyPet.

happyOne Mediterranean is a super-premium food inspired by the Mediterranean lifestyle, with fresh ingredients – meat or sardines – and a European innovation: fresh egg.

## Egg capital

From cereals to the most essential proteins, petMaxi carefully selects all its ingredients, giving priority to local suppliers and the best of what's available in Portugal. All raw materials used are free of genetically modified products.

Eggs are considered to be a healthy, complete and easily digestible food with

high nutritional value. They are rich in proteins that have all the essential amino acids in the right proportions. The protein found in egg white, ovalbumin, is the standard reference protein to compare the nutritional value of other food proteins. Using it fresh, and processing it only once, takes full advantage of this excellent ingredient. And eggs are the best local resources, as the city where the factory is located is known as the Portuguese egg capital.

## For pets in many countries

With its slogan 'Feeding Happiness', petMaxi shows its commitment to ensuring the health and well-being of pets and their owners, in Portugal and further afield. The company already exports to over 30 countries, and takes part in the biggest industry events worldwide. ♦

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petMaxi S.A.  
info@petmaxi.pt  
petmaxi.pt

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# The Portuguese pet industry: an overview

With a population of 2,080,000 dogs and 1,500,000 cats, Portugal is a pet-loving country. Where is the industry now, and how has it been doing during the COVID-19 pandemic?

In 2020, 38% of households in Portugal owned a dog and 32% of households were cat owners. The 9 top pet food companies in Portugal represent an annual sales volume of approximately €54.2 million (\$61.3M), which is a 470% increase compared to 2010. In the past year, annual production was around 178 thousand tons\*, representing almost 4% of the total production of animal feed in Portugal. (\*Ton = metric ton = 1,000 kilo = 2,204,62 lbs.)

There is a clear growth trend in the production and supply of pet food. That is expected to continue, encouraging local manufacturers to replace imports as much as possible by domestic production and the use of locally produced raw materials.

### Imports & exports

Portugal imports about 199 thousand tons of pet food (dog and cat), mainly from Spain (64%) but also from France, Italy, and the UK. With an average purchase

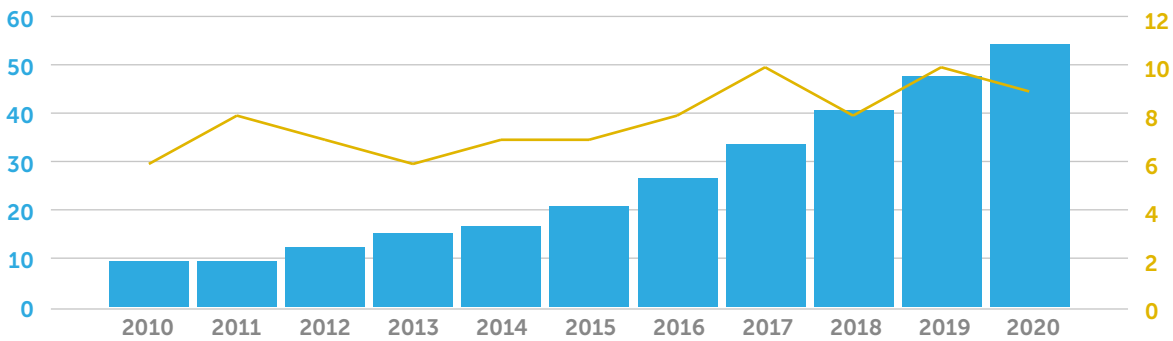
price of around €941/ton (\$1,065), the country spends approximately €187 million (\$212M) per year on the total import of pet food.

But Portugal doesn't only import. From January to December 2020, it exported a total of 165 thousand tons of pet food (dog, cat, and other domestic species), mainly to Spain (64%) and also to Georgia and Morocco. With an average price of about €567/ton (\$642), total export value is approximately €94 million (\$106).

Although exports are expected to increase in the coming years, it is uncertain how things will unfold with the supply chain issues the industry is facing.

### Impact of Covid-19

2021 was marked by the continuation of the COVID-19 pandemic, and by new lockdowns that restricted the way the sector operates.



Pet food companies and sales volume in Portugal  
 Source: INE - Instituto Nacional de Estatística

■ Sales volume (M €)    — Pet food companies (number)



The pandemic has boosted the number of pet adoptions, which will likely give the pet food market a boost too. But at the same time, there have been dramatic increases in the price of vital raw materials, additives, vitamins, and most ingredients – in some cases by 60-80%. This, together with worsening freight, energy and fuel prices, has clearly delayed post-pandemic recovery. One of the problems is that certain imported raw materials, i.e. sweet potato, cassava, fats, and protein have been in short supply and more expensive.

Another constraint is the lack of packaging materials, like plastics, aluminum, and cardboard – as much of this is sourced from Asia. Production of dog and cat food even came to a complete halt for a while because of this.

### Outlook

Despite all the difficulties mentioned, and the influence of some protectionist markets – like Brazil and Russia – that make trade agreements more difficult, the industry has continued to function.

Worldwide, the pet food market is projected to register a compound annual growth rate of 4.8% in the period between 2016 and 2026. Portuguese companies are committed to serve an increasing number of high-end and premium segments, as some consumers are prepared to spend more on pet food that is healthy and nutritious. But most people in the country can still only afford cheaper products. ♦



**Jaime Piçarra**  
Secretary General  
IACA



**Rita Gonçalves**  
Technical Adviser  
IACA



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**Aruba Pet Nutrition**

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# Partnerships drive success of this Portuguese retailer

His father started the company in 1996, and now Jorge Moura leads the Ornimundo Group, one of the largest pet retailers and wholesalers in Portugal. The company's steady growth continues...

Last year, Ornimundo added 5 new stores to its existing portfolio, bringing the total number to 32 stores and 3 vet centers. This includes smaller, mall outlets, but also larger stores measuring 800 sqm (8,600 sq. foot). Its biggest expansion in 1 year was the acquisition of a player with 9 stores, back in 2018. In terms of turnover, the brand now goes head-to-head with the country's other leading brand, Pet Outlet.

The Ornimundo Group, which includes Ornimundo and its wholesale business ProPet, is expected to grow by an impressive 17% this year.

## Portuguese passion for pets

Currently, the grocery market has a 60% share of the Portuguese pet market, while the specialist channel represents 40% of pet product sales. The overall market is growing at an average rate of 5%, but specialist pet stores are growing faster than that.

"In Portugal, we have around 4.9 million pet owners. That's 50% of all Portuguese households. Dogs and cats are the most popular – while cats and smaller dogs are growing in popularity, the fact being that more people live in cities," according to Jorge Moura.

"Being Latin, Portuguese people have a strong emotional connection with their pets. Regardless of how much money you have, you do what you can for your pet. As a result, the average ticket is increasing every year. But Portuguese owners are also price sensitive. They, quite rightly, demand high quality for what they're paying."

## Pandemic challenges

During the peak of the pandemic, pet shops in Portugal remained open. But people were understandably afraid to go out. Online sales of wet and dry pet food exploded as a result. And as COVID-19 spread, so did hygiene products. In-store pickup points were hastily created in all shops.

"The past 18 months have been truly challenging," said Jorge. "We've got through COVID, but we now have a supply crisis. Thank goodness we're able to work with our 20 supply partners in ProPet. Stock coming in from China is proving very challenging to manage. You don't know when it will arrive, and the freight costs have multiplied by almost 6."

## ProPet partnerships

A few years after Ornimundo's start as a retail store, Moura senior added a wholesale arm to the business: ProPet. The distribution company grew from strength to strength, and now works with 20 brands and 24 employees – overall, the Group has 230 employees. Distributing to both specialized pet stores and grocery stores, ProPet has 500 customers and is one of the biggest wholesale distributors in Portugal. The products sold by ProPet are also available in Ornimundo stores.

Jorge values the partnership he has with his suppliers in the industry – many of which have lasted for more than 16 years. These strong partnerships are what has helped the company a lot during the pandemic.



There are other benefits too: "I like partnerships because that is where you also see innovation," he said. "Retail is driven by the consumer, but in wholesale it is the brands themselves that come up with innovative ideas."

### Unexpected opportunities

There are plenty of opportunities in the Portuguese market for the Ornimundo Group to grow. Jorge aims to continue its double-digit growth in revenue in the coming years and to pass the €35 million (\$40M) mark.

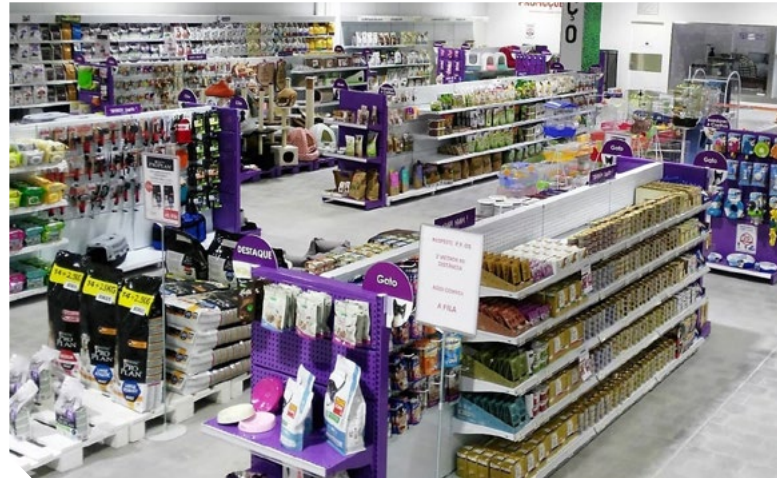
While Jorge sees ways for Ornimundo to increase its number of stores in Portugal to more than 50, he's also looking at Portugal's neighbor to grow ProPet. The Spanish pet market is up to 6 times larger than the Portuguese.

During the pandemic, another interesting opportunity presented itself. ProPet supermarket customers came knocking on the door: "What this supply crisis has done, is give us the chance to manufacture and sell our own beds and cushions at ProPet. I don't expect the China situation to improve until August, so this has allowed us to introduce our own private label brand, manufactured in Portugal."

### Online innovation

Jorge would like to achieve 10% of the company's revenue from sales on Ornimundo's website. Since its redevelopment in 2017, the website has had a strong presence. The customer can now use it both for purchases and to make grooming and clinic appointments.

But Jorge admits that more needs to be done. He wants a business intelligence platform to help staff make more targeted and timely decisions. Artificial Intelligence is another area he's looking into, which could enable the company to predict its customers' needs and wants – and then provide them. A digital team is currently creating sophisticated stock optimization software.



### What about sustainability?

Going green is something Ornimundo did long ago. They've been accredited with quality certification, ISO-9001, and environmental certification, ISO-14001, since 2007. But sustainability isn't huge in Portugal. And as Portugal isn't the wealthiest country in Europe, it's still not a top priority for many consumers.

Ornimundo does have corners in their stores for natural and grain-free foods and eco-friendly products, because it is a growing trend. But the biggest sellers at Ornimundo, in volume, continue to be regular wet food and snacks.

### And the next generation?

Despite having always worked in the pet industry, Jorge didn't join the family business again full time until 5 years ago – when his father retired.

With his background of having worked at different pet food companies, it's safe to say that Jorge is the right person to be running Ornimundo at this moment in time. Will there be another Moura leading the company in the future? Perhaps. But as Jorge says: "The family are the shareholders, but we want the management to be the very best. If that happens to be a family member, perfect. If not, that's also fine. We have 230 people depending on us. Let's face it, Ornimundo Group today is about more than just the Moura family." ♦



**Philippe Vanderhoydonck**  
Managing Director  
GlobalPETS

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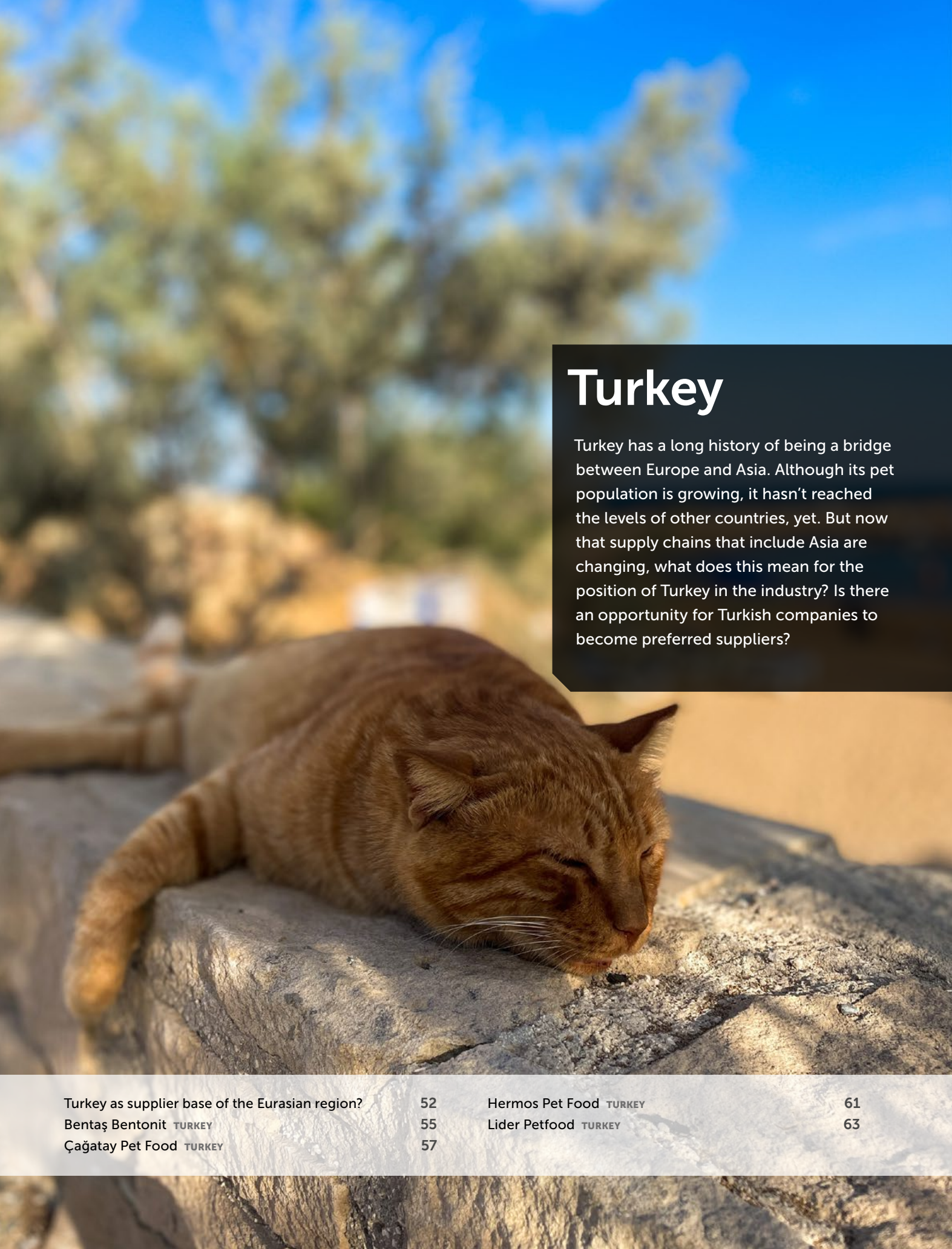
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# Turkey

Turkey has a long history of being a bridge between Europe and Asia. Although its pet population is growing, it hasn't reached the levels of other countries, yet. But now that supply chains that include Asia are changing, what does this mean for the position of Turkey in the industry? Is there an opportunity for Turkish companies to become preferred suppliers?

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# Turkey as supplier base of the Eurasian region?



**Many Turkish manufacturers, whether established or start-ups, are successfully meeting global demand. With product quality at European standards, a logistics advantage and competitive prices.**

The global pet sector is ranked among the top 5 developing industries with attractive prospects, and in Turkey things are looking very positive too. Although pet ownership is still only about a third of that in European countries, it is increasing rapidly, particularly among younger people. Currently, 12% of Turkish households own a pet.

## Expanding sector

Turkey has a population of 84 million, and the growing number of pet consumers is leading to a very visible expansion in the pet care sector. There are now 7,000 pet stores and veterinary clinics, and more pet food factories, cat litter and other production facilities have opened.

## Volume growth

Since the pandemic began, pet market volume in Turkey has grown by about 25%, and numbers of manufacturers and suppliers are increasing at the same pace.

Istanbul has the easiest access to global markets, so the city has the largest share of the pet products sector and leads in both production and consumption. Head offices of many companies are located here. Other

important centers for the sector are Izmir, Ankara, Bursa and Antalya.

With a \$200 million (€175M) export market and \$600 million (€525M) domestic market by the end of last year, Turkey's sales in the pet sector are on their way to reaching the 1 billion dollar mark.

## Product and service diversity

The diversity of suppliers and products in Turkey has increased significantly – especially in the past 5 years. There is 4 times the number of companies, covering all possible market segments. From dry food to wet food to treats, food supplements to pharmaceuticals to cosmetics, textiles and garments to other accessories, and aquariums to cages to cat litter. Since 2018, there has been rapid growth in pet services too, meeting increased demand for grooming, training, pet hotels and even pet taxi services.

## Flying high

Pets other than cats and dogs are also popular among the Turkish population. Turkey has the second-highest number of birds kept as pets, after



Italy. More and more brands are selling bird foods and fish feed, and these products are exported to 30 countries too.

### Exhibition breaking records

From Ulusal Fuarçılık's perspective, as a company that organizes international pet exhibitions in Turkey, the diversity of domestic and foreign exhibitors and visitors proves, first of all, the accessibility of the Turkish market, as well as that of Eurasian and global markets via Turkey. And interest in the Turkish pet market continues to grow. The record exhibitor and visitor numbers at the recent PETZOO Eurasia 2021 exhibition were further evidence of this.

### Investing in the Turkish market

The developing market in Turkey certainly has a part to play in the growing global pet sector. And the many opportunities it offers will encourage domestic and foreign companies and exporters to invest more and more in the Turkish pet sector. ◆

### GROWTH RATES IN 2021

- Physical pet retail channel sales – 7%
- E-commerce channel sales – 20%
- Pet product sales outside the metropolitan areas – 25%
- Foreign trade volume – 128%

### GROWTH FORECASTS FOR 2022-2025

- Total pet product sales – 15% per year
- Over \$400 million (€350M) pet product exports by 2025



**Selçuk Çetin**  
General Manager at Ulusal Fuarçılık



**Cengiz Gümüş**  
Sales Coordinator at Ulusal Fuarçılık  
ulusalfair.com



### Catzone TURKEY Premium quality cat litter

Turkish white bentonite is known for its premium properties: instant and strong clumping, high absorption capacity and the whiteness speaks for the cleanliness.

Produced from 100% natural white bentonite. Optional additives such as fragrances and activated carbon can be used to customize and further enhance the characteristics of the cat litter.

To support a sustainable world, the premium quality Catzone cat litter products are packed in recyclable quadro bags.

The product is being exported all over the world and the company is looking for partners to further expand its reach in countries where it is not yet represented.

Companies planning to have their own private label cat litter products are welcome to contact the company too.

**Cilesiz Madencilik Ltd.Sti.**  
catzone@cilesiz.com.tr  
cilesiz.com.tr



## We serve 114 international customers in 67 countries.

Our brand VANCAT is exported to 54, CAT'S WHITE is exported to 15 and one of our latest brand RoCat is being exported to 12 countries today. Again, we make contract manufacturing to approximately 40 foreign companies under their own brands.

Our exportation for cat litter. In 2019 was 85.000 tons, we have reached our goal in 2020 as 125.000 tons 2021 is 156.000

We sell through totally 42 domestic wholesalers and pet food producing companies 35% of these sales are made of our brand and the other portion is made of Private Label (contract manufacturing) productions.



CLEANING AND SANITATION  
CAT LITTER - TURKEY  
VIENNA 2019 - 2020

CLEANING AND SANITATION  
CAT LITTER - TURKEY  
VIENNA 2021 - 2022





# Respecting the generosity of nature

Bentaş Bentonit was established in 2007 to produce clumping cat litter from the white bentonite reserves available in Turkey. Today, it exports to 67 countries worldwide.

Almost 90% of all white bentonite reserves in Turkey are found in the areas around Ordu, Ünye and Fatsa. The company has 45 million tons\* of bentonite in reserve, spread over 7 mines. This makes it a trustworthy partner that can always deliver.

## Latest technology

Bentaş Bentonit's 30,000 sqm (323,000 sq. foot) plant is situated in the Fatsa industrial zone, close to the mines. Using the latest technology, it produces cat litter that is hygienic and easy to use for pets and their owners. The plant's drying capacity is 4 lines that handle approximately 260,000 mt/year.

The whiteness of the bentonite from these mines varies – between 75% and 95%. The mines also provide many other raw materials, allowing the company to offer a wide range of products to meet all its customers' needs in terms of quality and price.

## Highest quality

Bentaş Bentonit also has operating licenses for some very productive mines on the Black Sea coasts. Here, the highest quality calcium bentonite is mined, with the capacity to absorb water up to 4-5 times its volume. Another advantage of calcium bentonite, when compared to sodium bentonite, is that odor absorption is better.

The area where calcium bentonite can be mined is 6,000 hectares (23 sq. miles) and contains 5 mines with a reserve of approximately 10 million tons.

## Research and development

The company's R&D laboratory has a strong focus on efficiency improvement, as well as its work on new product development. As the company mission is to produce very high-quality products, its quality control department uses an extensive set of quality parameters for production checks.

## Some figures:

- 720 tons per day
- 6 different analyses of each ton
- accounting for a total of 4,320 analyses every 24 hours

The wide variety of bentonite produced enables the company to supply cat litter based on each and every customer's set of requirements. ♦

\*Ton = metric ton = 1,000 kilo = 2,204.62 lbs

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**Bentaş Bentonit A.Ş.**  
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## Çağatay Pet Food TURKEY

# Using past experience to look to the future

Çağatay Pet Food was the first company to bring extrusion technology to Turkey over 20 years ago. It has since expanded into other areas of the industry.

Çağatay Pet Food was established as a trading company in 1982 by Oktay Çağatay, who had already spent 26 years working in the private business sector. When the company had raised the necessary capital 13 years later, it was able to build a fully equipped manufacturing facility.

### Company history

In 1998, Çağatay brought extrusion technology to Turkey, an industrial technique that had recently been introduced in Europe. This played a major role in the country's developing aquaculture industry, which has since become a leading sector. Then the company decided to go into pet food production. After 2 years of detailed preparation, dry pet food manufacturing started in 2001.

### Unique ingredients

Some 30% of the company's raw materials come from Çangal Tarım enterprises, also part of the Çağatay family. Other raw materials are carefully selected from EU-certified international and domestic

suppliers who produce the highest quality. These are all stored in 12,000 sqm (130,000 sq. foot) warehouses, and inspected in full compliance with HACCP regulations.

### Quality control

In Çağatay laboratories, everything from raw material to final product has to meet high-precision requirements. Approximately 360 physical analyses and 100 chemical analyses are performed on average each day.

### Export business

The company has proved that customer satisfaction is its priority. Its strong reputation for sustainable, high-quality pet food, and timely delivery, has helped build its business in exporting to more than 50 countries in Europe, Asia, Africa and Oceania.

### Knowledge platform

A few years ago, the company started work on a global structuring process. Today, it offers distributors a marketing infrastructure called Çağatay Assist, where teams in different

countries can find knowledge and best practices, share experiences and co-create.

Çağatay Assist allows distributors to:

- customize websites for their own country with different languages and features
- access all printed and digital archives from a shared pool
- manage websites and social media accounts using educational content

### New horizons

With its many years of industrial experience, formulas prepared by nutritional experts, and advanced production technology, Çağatay is ready for future challenges. And with brands in different price ranges, it can meet the daily needs of tens of thousands of consumers. ♦

Çağatay Evcil Hayvan Mamaları ve Yem Ürünleri San. ve Tic. A.Ş.

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**Effeffe** TURKEY

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The company understands the vital importance of nutrition and believes all pets deserve a healthy diet.

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The ingredients of the LaVital brand are carefully selected and the food is expertly prepared to preserve all valuable nutrients.

The company can also help its customers to produce their own private labels.

**Effeffe Pet Food Turkey**

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**TISERT** TURKEY

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**What TISERT does**

- ◆ Utilize only the highest-quality raw materials in its production
- ◆ Value improving overall-quality and enhancing the product range every day
- ◆ Give special attention to the end product and its packaging
- ◆ Provide a safe environment for animals with the products it creates

**How they do it**

- ◆ A modernized production line with the latest technology and machinery
- ◆ Committing to high quality and sustainability goals
- ◆ Grounded on creativity and productivity

**What they offer**

- ◆ Own brands that are known in many countries today
- ◆ Private label products for international clients

**TISERT Limited**

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No Wheat    No Corn    Just Brown Rice As Grain



Our economical brand with its renewed formula and enhanced flavor, with content suitable for the taste and needs of our innocent friends.



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Our Premium brand, makes life simple and healthy to our inlove friends.



Our Super Premium brand that does not contain soy or corn, has content that addresses food content sensitivities and meets the energy of our rebellious friends with its expanding product range.



Our low-grain Super Premium brand that does not contain corn and wheat and contains only brown rice as grain for our explorer friends - with its taste from the past.



Our clinic-specific Super Premium brand, developed for the healthy nutrition of our wise friends in many areas from weaning to special needs, supporting sensitivities.



Our Super Premium Grain-Free brand that meets 90% of the protein needs of our hero friends with animal protein, enjoying the pride of being Turkey's first grain-free food.



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Hermos Pet Food TURKEY

# The shining star of the Turkish pet food industry

Now in its 5<sup>th</sup> year of business, Hermos is successful not only in Turkey but also in more than 40 other countries.

Hermos Pet Food is a dry cat and dog food producer. Understanding the importance of research and development, the company closely follows scientific studies done in different parts of the world. It has also conducted its own studies with several universities to create a range of quality brands.

## Strategic growth

Since it started in 2017, Hermos has achieved growth by its ability to accurately identify market needs. Fast decision-making and innovation helped it to become a leading company that shapes the direction of the market. This soon made it a rising star in Turkey, and also in other countries where it is located.

The strategic growth it has created together with its business partners ensures the company's strong market position. And also makes sure that it stays one step ahead

of its competitors. As a result, it has been successful in all the countries where it has introduced its products, and is a shining example of how that can be achieved.

## Market focused

Every pet market has different dynamics. Aware of this, Hermos first collects detailed information on each new market it enters. Working with its business partners, it gains a full picture of the specific market situation and uses this understanding to determine a market-focused strategy for the way forward.

At regular intervals, the company measures its adopted strategies. Knowledge of the degree to which it is achieving its goals helps Hermos evaluate its position and redefine its strategies. Its primary goal is very clear – to shine at whatever it does in any country and to do that in a short time.

## Always improving

The company was the first to use fresh meat injection technology in Turkey, and the first to introduce grain-free food in the country. But it is always looking ahead, constantly searching for ways to use new technologies to improve its products. Wanting even better quality to further develop its business.

## Family values

Hermos works on the basis of a number of values. It sees its company as a 'family', and its employees, business partners and customers as part of that growing Hermos family. All acting in unity to produce top-quality products for cats and dogs. ♦

---

**Hermos Gıda Ltd. Sti.**  
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Lider  
PET FOOD





# Investing in growth

Turkey’s largest dry food producer, Lider Petfood, increased its annual production capacity by double digits in the past 5 years, reaching 220,000 tons with its 2<sup>nd</sup> factory investment in 2021. Now it is investing in cat litter too.

Pandemic restrictions generated great momentum for the pet food industry, as levels of pet ownership rapidly increased. Lider Petfood has been able to respond well to the increasing demand, with its flexible production capability, effective raw material supply planning, and 5-line production facility.

## Wide product assortment

The company manufactures more than 400 different pet foods, treats, and cat litter products under 13 brand names.

The Reflex brand has the biggest product assortment, with dry foods, wet foods, treats and cat litters – very few brands have such an attractive portfolio of a wide range of products.

## Taking confident steps globally

As the biggest pet food producer in Turkey, Lider Petfood is also the country’s largest pet food exporter, selling to more than 60 countries. It continues to expand its global market.

## KEY FACTS

### Products

- Dry food, wet food, and treats for cats and dogs, plus cat litter
- More than 400 different products under 13 brand names

### Production and logistics

- 220,000 tons/year dry pet food production capacity with 5 extruder lines

- 40,000 sqm (430,000 sq. foot) production facility, warehouse, and logistics center

### Brands

- **Super Premium:** Spectrum, Spectrum Low Grain, Reflex Plus
- **Premium:** Reflex, Bonnie, Proline
- **Economy:** Trendline, Enjoy, King, Thunder, New Cat, New Dog, Jetix

Since establishing a distribution hub in March 2019, the company is able to provide a cheaper, faster, and more convenient service to its international partners. It can now leverage this to further strengthen its position in the global pet market.

## Investment in bentonite litter

In 2020, to meet the increasing demand for cat litter products, the company set up Lider Pet Bentonite. It went on to invest in Bentonite mining areas, as well as a cat litter

facility that started production in August 2021. With the capacity to produce a total of 50,000 tons/year, Lider Pet Bentonite will focus on producing a wide range of white bentonite cat litter products. ♦

Lider Petfood Yem San. ve Tic. A.S.  
[export2@liderpet.com.tr](mailto:export2@liderpet.com.tr)  
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