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Pet food and packaging

Pet food and the latest innovations in packaging.

Ingredients and production

The role of pets in society.

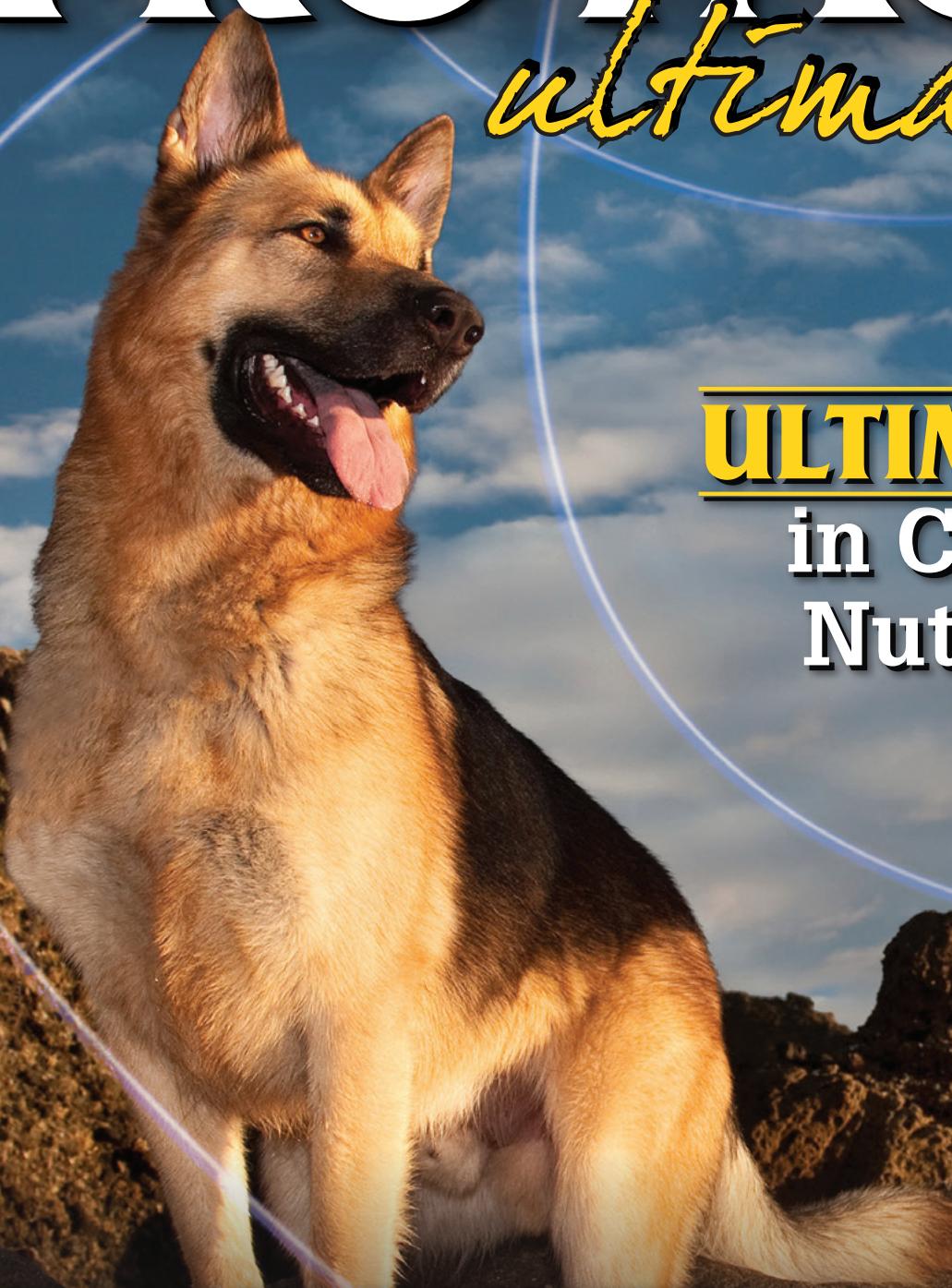
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We highlight the pet industry in Belgium and The Netherlands.



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Pet food and packaging



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Connected

It is almost becoming a cliché, but that does not make it any less true: pets are increasingly part of our families and everyday lives, which results in a whole range of products and services to cater to the needs of pet parents. This includes the relatively new segment of wearable technology for pets: wearable trackers to collect data about pets' movements, sleep patterns and basic health functions. From a health and behaviour perspective, these data are of great importance. You can read more on page 14.

It also sparks the conversation about responsible pet ownership. In this issue, we discuss the theme in our Ingredients and production section, starting on page 48. If this is a topic you are interested in, keep an eye out for our next Purple guide about 'Modern pet ownership', which will be published on 13 October.

In this issue we will also be delving into the markets of Belgium and The Netherlands (page 78 onwards). Both markets experience similar patterns of development, but are nonetheless quite different in many respects. In this issue, we present an interesting collection of interviews and company profiles from pet industry players from both markets.

In this time of globalization, being connected and staying visible is very important. In order to support the international pet community, we have been redesigning our website. We have created an online repository of company information called 'Looking for...', which offers the perfect platform to showcase your company and look for new business partners, as well as an online journal featuring the latest developments in the pet industry worldwide, including articles, market reports and white papers.

I would also like to draw your attention to the announcements of our upcoming conferences. GlobalPETS Forum Asia 2017 will take place on 15 November in Shanghai, one day before the CIPS exhibition. You can read more from page 66 onwards. As a supplement to this issue, you will also find a brochure about the next edition of our European conference: GlobalPETS Forum 2018, taking place 24 to 26 January 2018 in Venice, Italy. We look forward to welcoming you at these events. More information can be found on globalpetsforum.com.



Corine van Winden, CEO



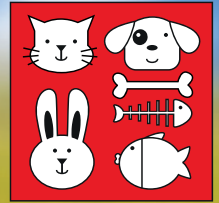
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Ferribiella launches the Coats 017/018 collection, distinguished by its quality, elegance and elegance. Each model pays attention to the needs of our dogs: **Materials and details are carefully chosen by a dedicated team, really Must-have.** Our coats collection considers the animal's comfort, an essential element. Our garments are comfortable, practical and functional. Light weights that meet the animal's needs and their owner: Waterproof, warm, soft with classic colors and modern fantasies. **Over 36 models, a rich collection that 'the chance to dress up all the dogs, from the smallest to the largest.**

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October issue

The positive development of the Italian pet industry continues.

Italy



An update on the latest developments in the natural pet food segment.

Natural pet food



Raw material testing: an important quality assurance tool in pet food production.

Ingredients and production

Upcoming issue | Advertising deadline: 15 September 2017 | Publication date: 13 October 2017

Contact head office (see page 112) or local representatives (see page 111).

Pet industry highlights



GlobalPETS Forum Asia 2017
15 November 2017, Shanghai, China
globalpetsforum.com

GlobalPETS Forum Europe 2018
24-26 January 2018, Venice, Italy
globalpetsforum.com



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Correspondence may be edited for clarity or length.

Chewy.com loses three major pet food manufacturers

Recently, Fromm Family Foods and Champion Pet Foods announced they will no longer be selling their products on Chewy.com. Both companies cited PetSmart's acquisition of the web retailer as the catalyst for the move. These moves follow Tuffy's Pet Food's announcement earlier this year that it was severing its ties to Chewy.com as a result of the acquisition by PetSmart.

At a gathering of executives from more than thirty pet specialty retail operations during SuperZoo, these three manufacturers pledged their commitment to the specialty channel and trumpeted their decision to cease selling products on Chewy.com.

A move meant to give independent pet retailers a fair shot of competing at a time when mega-e-commerce sites are offering consumers discount pricing that brick-and-mortars cannot match.



PetSmart CEO stepped down

Michael J. Massey stepped down from his role leading the Phoenix-based specialty pet retailer PetSmart.

Massey, who also served as president of PetSmart, was with the company for two years, joining in 2015 when

the company went private after being acquired for \$8.7 billion (€7.4 billion) by private-equity firm BC Partners. Since that time, Massey has been instrumental in the company's growth, strategically implementing acquisitions to strengthen PetSmart's online retail presence. The \$3.35 billion (€2.8 billion) acquisition of South Florida-based Chewy.com, an online pet retailer and major competitor for the company, earlier this year, was one of those tactical moves for the company to combat the decline of many traditional brick-and-mortar retailers. Soon after that acquisition, the company laid off less than five percent of its corporate workforce in an effort to focus on future growth.

Fish4Dogs takes bite out of growing Chinese market



The Chinese pet care industry is one of the world's fastest-growing markets and Fish4Dogs(UK), specializing in fish-based animal food, is targeting the nation's rapidly expanding middle class. It started selling pet food in the world's second-largest economy in 2010, after it was approached by Ocean Star at a time when the online Chinese company wanted to expand its business, from selling local pet-food brands to specializing in Western brands on its websites and in stores. Dogs are much more popular than other pets in China, where people prefer pedigree breeds and high-quality products, so other companies are likely to target the market. Graham Smith, Fish4Dogs CEO, is not worried about competition. "We believe we are the original and best and continue to innovate to stay ahead of our competitors," Smith said.

Pet industry highlights

20th edition Pet Fair Asia

From 24 to 27 August, Pet Fair Asia celebrated its 20th anniversary. Part of the celebrations was a festive dinner, during which the past twenty years of development and spectacular growth of Pet Fair Asia were reviewed. A lot of companies were put in the spotlights during this evening, and PETS International was the proud recipient of the Best Media Platform award.

This year's show in Pudong, Shanghai, was, with over 900 exhibitors and many international visitors, bigger than ever. Pet Fair Asia demonstrated once again its important role in the Chinese pet industry as well as being an important trading platform for the Asian region.



Norwegian company Dogman expands

Dogman opened its first branded retail outlet in Østerås on the outskirts of Oslo on 17 August and, through the acquisition of two of Norway's largest pet stores, now has the opportunity to swiftly implement the company's new store concept in additional locations in Norway. Through the Friends for Life franchise concept, Dogman offers its professional customers a visually appealing store concept and system support, along with structural and business expertise that, in the final analysis, benefits both profit and stock turnover.

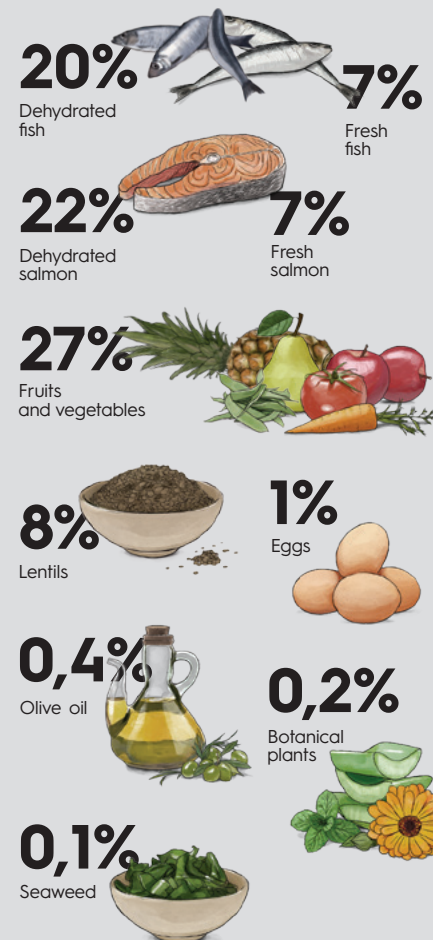



Mediterranean gourmet


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Pet industry highlights

Private label's market share reaches all-time highs in nine European countries

The popularity of private label keeps growing across Europe. The latest Nielsen data shows that the market share for retailer brands has climbed to all-time highs in nine European countries and for the first time stands at 30% or above in fifteen of the twenty countries tracked for PLMA's International Private Label Yearbook.

PLMA's 2017 Yearbook statistics reveal that private label's market share reached all-time highs in Germany, Italy, The Netherlands, Belgium, Poland, Austria, Sweden, Norway and Denmark. The biggest market share increases were posted in Austria, up 2.8 points to 43%, followed by Germany, up 2.1 points to 45% and Poland, up 1.4 points to 30%. Seven countries now have market shares of 40% or higher: United Kingdom, Germany, Austria, Belgium, Switzerland, Spain and Portugal. Brian Sharoff, President of PLMA, says: "The latest Nielsen statistics reveal clearly that 2016 was another good year for retailer brands in Europe. This continues a long-term trend which shows that private label's success is not tied to economic cycles but reflects the growing confidence shoppers have in retailer brands."

Market share in the United Kingdom stayed above 45% and appears ready to resume growth as supermarkets expand their private label programmes to combat the competitive challenge from discounters. In France, private label penetration remained over 30% for the thirteenth consecutive year.

In the northern countries, both Belgium and The Netherlands reached new market share highs. All of the Scandinavian countries – Denmark, Norway and Sweden – posted increases. For the first time, private label penetration for all of the Scandinavian countries stands at 30% or above.

Poland led the way among the central and eastern European countries, climbing more than one point to cross over the 30% market share mark. Hungary stayed steady at 34%, while Czech Republic and Slovakia remained over 30%.

Among the Mediterranean countries, market share in Italy climbed for the fifth consecutive year, posting its biggest increase since 2012. Private label penetration is expected to increase as Aldi enters the market and Lidl looks to add more stores there. Greece and Turkey stayed above 20%.

PRIVATE LABEL SHARE OF PET PRODUCTS PER COUNTRY			OVERALL PL SHARE PER COUNTRY	
COUNTRY	VOLUME SHARE (%)	VALUE SHARE (%)	VOLUME SHARE (%)	VALUE SHARE (%)
Spain	69.5	51.1	52.2	41.7
Switzerland	45.0	30.9	50.8	42.8
United Kingdom	n/a	n/a	45.5	41.4
Germany	67.1	55.5	45.0	35.6
Austria	64.4	47.5	43.3	32.2
Belgium	61.1	42.7	43.2	31.5
Portugal	63.2	47.9	40.3	29.9
Hungary	67.1	54.4	34.0	24.6
France	n/a	n/a	32.8	25.9
Denmark	51.5	31.8	32.6	26.6
Slovakia	54.7	43.4	32.4	22.9
Finland	24.6	15.5	31.3	24.8
Sweden	21.1	11.5	31.3	26.0
Czech Republic	46.7	33.0	30.7	21.4
Poland	53.8	38.3	30.2	21.3
Norway	41.5	17.6	29.8	24.1
The Netherlands	27.7	23.3	29.7	27.4
Turkey	n/a	n/a	22.8	15.2
Italy	32.8	20.8	21.6	18.6
Greece	n/a	20.8	20.4	15.4



World Pet Association president retires

Doug Poindexter, president of World Pet Association (WPA), will retire after 27 years with the organization. In recognition of Poindexter's status as the longest serving executive in WPA history and his weighty

contributions to the organization and to the pet industry as a whole, the WPA Board awarded him with WPA's highest honour, the Matsui Award. The award is named after former Board President, Jiro Matsui, and is presented to honour lifetime contributions to the pet industry. His retirement marks the culmination of a 48-year career in the pet industry. Poindexter will remain at the helm of WPA until the end of December and will serve in an as-needed capacity moving forward. While a replacement has not yet been identified, WPA is currently conducting a widespread search and anticipates announcing a successor in the fall.

Mobile technology is changing the lives of both pets and people

From RFID implants to GPS tracking, mobile technology in the pet industry is offering new safety and security solutions to pets and their owners. One example is Finding Rover, which has used facial recognition technology to successfully bring dogs back together with their owners. Mobile technology in the pet industry is providing organizations with a way to better manage their businesses, and as a result, they are making pets' and their owners' lives better. Aside from safety and tracking lost pets, pet owners are increasingly looking towards smart connected devices to feed, play with and keep an eye on their furry friends when they cannot be physically around them. Retailers are bringing in such devices to meet the demand, including products such as automated pet feeders, toys and monitors. The global market for such products was estimated to be worth \$1 billion (€1.2 billion) at the end of last year, according to US-based market intelligence firm Transparency Market Research.

Who is
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Pet product innovations

New technological innovations open up a world of opportunities for innovations in pet products. The market for wearable technology for pets is booming and that brings with it the need for product protection.

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Tre Ponti ITALY

A dream come true



Tre Ponti is a world leading pet product manufacturer based in Treviso, near Venice. This successful status has been achieved thanks to top quality, outstanding materials and the entire manufacturing cycle set in Italy.

Pet product innovations



Success story

Mr Pierantonio Ceconato, founder and CEO of the family company, has over forty years' experience in the textile industry and a deep love of and commitment to his job. He designed and crafted the Easy

Fit harness: easy and very comfortable to wear, due to its light weight, with an innovative design, which heralded the start of a successful business.

Tre Ponti currently produces about 5,000 harnesses per day, which are then worn by almost 2 million dogs in over 55 countries around the world, including Japan, China and the US. In 2016, the company obtained the approved exporter status to Korea and Switzerland, which is clear confirmation of the significant achievements Tre Ponti has in the pet products market. The brand is commercially represented by several distributors and specialist pet retail chains worldwide.

Italian craftsmanship

All Tre Ponti products are designed and completely handmade in Italy. The highly qualified staff pays maximum attention and dedication to every single seam. After that, the harnesses undergo strict quality control, double-checking and testing throughout the entire production cycle, down to the smallest detail of each step in the manufacturing process.

The investment in the potential and quality of materials, exclusively made in Italy, has led to the creation of a wide range of successful products, fully complying with all of the many different needs of pets. The harness patent, the brand and the logo are registered trademarks in over 55 countries in the world and special resistance-test devices ensure the long life of each item.



Unmatched quality

"It is better to fail in originality than to succeed in imitation" is Tre Ponti's motto, and this fully embodies the company philosophy. Their quality research is never ending and the development of each product always starts with the ultimate goal of customer satisfaction. The high quality of Tre Ponti products also depends of course on the selection and use of the best hypoallergenic fabrics, which are bought from a few reliable suppliers, and last but not least, on a refined artisanal technique mastered by the company's tailors.

The company's loyal relationship with customers and with their beloved pets is the key to success of the company.

Constant attention to detail and collaboration with the Italian Rotary/ Lions Association has made it possible to design and produce a special, innovative harness for guide dogs for the blind. ♦

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Wearable tech for pets

The market for pet tracking and tracing devices has opened up in our attempts to control our own fitness and our pets'.

Fitness for the entire family

The glut of standardized pet products has left little room for imagination over the past few years. However, the anthropomorphism inherent in the pet industry has led to exciting expansions in wearable technology. The desire for fitness and exercise tracking, accessible by humans in the form of fitness watches, has extended to the animal family.

Fitness trackers

Pet obesity is a serious and growing health issue, just as it is in humans. The fitness and exercise boom has expanded to include pets, particularly dogs,

as owners can now monitor their pet's movement. Additionally, they can log the pet's sleep patterns. Owners can make suitable decisions for the pet's health. In our quest for a more welfare-friendly society, this has to be an important leap forward in the animal care market.

The data is described as 'actionable', in other words, health professionals can access the data to assess suitability of exercise, for example during recuperation after surgery. It even goes so far as to suggest the pet's life expectancy may be increased. After all, who would not want their pet to live longer?

The anthropomorphism inherent in the pet industry has led to exciting expansions in wearable technology.

From a behaviour perspective, data is all important. A tracker can measure sudden bursts of activity throughout the day. A dog exhibiting signs of separation distress could show higher activity as the owner first departs, settling later on. If the condition is being treated, one would hope to see the distress activity reduce.

Given the huge increase in demand for dog walkers and day care, these devices monitor whether or not adequate exercise is being provided and guides owners as to what they themselves need to 'top up' after a day in doggy day care.

The size of wearable devices has reduced and is even available for cats, since some are now as small as a collar tag. A huge selling point to owners is their versatility, serving a variety of data purposes.

Lost and found

According to Sainsbury's Bank pet survey, around sixty dogs and cats go missing each hour in the UK. Microchipping, now a legal requirement in the UK, is still a 'report and wait' system. Not ideal when an owner desperately wants to know where their lost pet is.

The American Society for the Prevention of Cruelty to Animals (ASPCA) (2012, Animals Journal) conducted a five-year study on lost pets in 1,015 households. 14% reported lost dogs and 15% lost cats. Only 93% of dogs and 75% of cats reported missing by their owners were returned. But even one lost pet will leave a family distraught, and it could be avoidable with a tracker.

Variety of trackers

Radio Trackers as used by hunting dogs, cover walkie range, and are substantial in size. GPS Trackers (GSM cellular) are significantly

more interesting to the pet retailer. These allow pinpointing of a pet's location in real time and are small enough to attach to a collar.

Battery life ranges from six hours when actively tracking, to up to twenty days in devices that monitor and switch off when the pet is inactive. Some devices are rechargeable.

Range of tracking varies, from 30 metres to well over 100 metres. The range boundary known as 'geo-fencing', alerts an owner when the pet strays beyond a pre-set region.

Some devices utilise mobile SIM cards, allowing an owner to send a text message to the device on the pet's collar. A text is then sent back with a link to a Google map coordinate. Subscriptions keep you linked to their finder service, and pets can also be tracked via an iOS or Android device app.

Tracking the future

The future is filled with data about pet's whereabouts, the amount and type of exercise they receive, and apps on your mobile device keeping you updated with the extensive data they collect. Retailers, both online and in custom-facing roles, should focus on this exceptional demand. ♦



Karen Wild

Dog trainer and pet behaviourist
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Patenting pet products

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The original idea of a patent system was to stimulate innovation and protect intellectual property.

Original content

Copycats have the time of their life nowadays, copying products, services and business models. What went wrong in recent history and how do we deal with patent and brand protection in a world that is changing ever faster?

Inventing the patent

Some form of patent rights was already recognized in ancient Greece, although it was not until 1450 that the first statutory patent system, 'The Venetian Patent Statute', would be presented. It was a decree by which technical devices had to be submitted to the Republic in order to obtain legal protection against potential infringers.

Patents were protected for ten years. Later on, the Renaissance patent system evolved into the English Patent system that recognized 'intellectual property in order to stimulate invention'. This modern patent system was fundamental for the Industrial Revolution (1760 to 1840) and the current patent system.

The patent bubble

The original idea of a patent system was to stimulate innovation and protect intellectual property (IP) – a wise starting point. In the meantime, patent protection has sometimes inhibited innovation. Since almost every imaginable invention is registered by way of a patent, new inventions do violate previously registered patents quite easily.

The consequence is that in order to commercialize an invention, one has to pay IP rights to dozens of other patent owners. High tech companies like Apple and Samsung do pay each other a few dollars for every smartphone they sell to cover the violated patents. This leads to unnecessarily expensive products for consumers and is therefore undesirable. This patent bubble will be dealt with in the coming years.

Patent Trolls

Besides the unintentional violation of patents, there is another issue: there are people and companies that register a patent and simply wait until someone else violates their patent.

Once a company is making some serious money, the 'Patent Troll' goes to court to claim its IP rights under the patent. To minimize patent trolling, Europe has devised a 'loser-pays-all costs regime'. This seems to work when compared to the United States, where each party is responsible for paying its own legal costs. Another measure is the limitation on patents concerning software, fruits, vegetables and living material (like genetically modified pets).

Taking measures

How do you protect your intellectual property from such copycats? Invest in defensive patent protection: perform thorough patent research and do not forget to register patents on those parts of an invention that may not seem particularly relevant. It can be of great help when defending your IP by way of your other patents.

Brand protection can best be done by model registration. Request an extensive range of domain names, as well. Be aware that each domain name is backed by a trade name at the Chamber of Commerce. For new product names: choose a new, non-existing word or combine two existing words. ♦



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Beeztees THE NETHERLANDS
New: Beeztees Cat Cubes

Innovation is becoming a way of thinking at Beeztees. They show that with their newest, innovative lifestyle concept: Cat Cubes!

The Beeztees Cat Cube collection has a unique design and is the first elegant, modular system that appeals to both cats and owners around the world. It is designed to suit different needs and desires of your cat. The range of modules creates a great habitat for cats to eat, sleep and play in. All modules are created with openings, so your cat can reach all connected modules.

You can mix and match the design and different colours with your interior and change the configuration weekly for fun for your cat. The measurement of the Beeztees Cat Cubes is 49x29x32.6 cm.

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Haobay Pet Products CHINA

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Wenzhou Haobay Pet Products Co., Ltd.

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Advertorials



Farm Company ITALY A trendy autumn with foliage colours

Farm Company's new Muso collection was inspired by the warm tones of the Canadian foliage season. Made in Italy, from a combination of canvass, a heavy-duty cotton twill material, and soft elk leather. The complete range includes three sizes of collars, two sizes of leashes and four sizes of harnesses. Comes in classic earth tones with brass-plated metal accessories, an easy-open buckle and a U-shaped style for perfect and comfortable fitting.

Farm Company
info@farmcompany.it
www.farmcompany.it



Pratiko Pet ITALY Italian Cuddles

Brand's jewels are the patented harnesses that guarantee extreme wearability, safe leashes, colourful collars and soft muzzles. Thanks to the design, these products avoid compression or stress on the pet's neck, snout and joints. All products are designed and handcrafted exclusively in Italy, with certified Italian materials. Tailored fitting and innovative designs are the prerogative for an assortment representing the high standard for dogs and cat accessories.

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Rukka Pets FINLAND

A collection for every dog owner

The Rukka Pets garment collection is well-known for the latest functional materials and perfect fitting.

Outstanding design

Century-long know-how of clothing design and manufacturing is an excellent basis for developing the pet collection. Various functional needs, measurements for various breed sizes and features are taken into consideration at every stage of the design process. The collection includes clothing and a wide range of footwear. Also included are collars, leashes and harnesses in many colours and materials. Safety gear and training products are also included. The size range is very wide, catering to dogs with a back length of 25cm up to 80cm. The range of styles appeals to dog owners searching for a sporty, functional look and even to the most fashion-conscious masters.

Luhta Sportswear

Rukka Pets is one of the brands of Luhta Sportswear Company, a renowned family business. Luhta is one of the largest

sportswear manufacturers in Scandinavia. The company employs around 1,600 people, entails more than fifteen brands and has more than 10,000 wholesale customers in Europe, Asia and North America. Luhta also runs its own retail chains for fashion and sportswear.

Perfect match

Luhta started pet operations six years ago in collaboration with the biggest Scandinavian pet retailer Musti & Mirri. The aim was to introduce a high-quality, fully color-coordinated concept collection, positioned at a price level affordable to every dog owner. It was a perfect match, combining Luhta's 110-year know-how in design, manufacturing and materials, and the retailer's thorough pet expertise.

The collection was designed under Luhta's Rukka brand, which has been famous

for top-level protective wear since 1950 and awarded several design prizes and product functionality tests along the years. The main focus of the collection is in pets' well-being, offering protection and comfort in every situation and weather condition.

High quality outdoor gear

All products are designed to withstand anything the weather might throw at pets and keep them warm in even the lowest temperatures. Their range of styles has been carefully tailored to appeal to even the most fashion-conscious canine, and each item is available in a selection of colours to keep pets looking at their best! ♦

♦ **Rukka Pets**
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Pet food and packaging

Even with the best packaging, nutritional content will change over time. However, packaging can have a dramatic impact on nutrition and safety and therefore also on performance and health.

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Packaging impact upon nutrition for pets

Packaging and nutritional efficacy are rarely discussed together. However, packaging can have a dramatic impact on nutrition and safety and therefore performance and health.

Even with the best packaging, nutritional content will change over time.

Packaging solutions

As there are a variety of food products, there are an equal expansive variety of packaging types (paper, metal, plastic, cans, pouches, shrink wrap, et cetera). Each type brings solutions but can also create challenges. In pet industry history, the extension of the required shelf-life increased from 12 months to 18 to 24 months. It varies depending upon the product, the market and projected turnover. Longer shelf-life ensures pet food pipeline fill and sales, but it also creates inventory management issues.

These longer shelf-life goals are rarely seen in the human food market. I have asked many consumers what length of shelf-life would they find acceptable with their products. As expected, the idea of any food in a pantry being eighteen months old is appalling. It might be acceptable with canned foods and spices.

As a young nutritionist, I quickly learned that intake of a good nutritional formula was not always ensured as the ingredients and process could create tastes that did not encourage intake.

All the right nutrition is useless unless the pet eats it. With understanding of palatability, some of these hurdles were overcome. However, what I did not expect was the packaging could emit chemicals into the food that would taint the taste and impact the acceptance. Adding coupons in plastic sleeves or adding free measuring cups could reduce palatability dramatically. I am sure many test the palatability in their chosen packaging, but I am almost assured that many do not.

Changes in nutritional content

Even with the best packaging, nutritional content will change over time. Let us consider vitamin content. In processing, 30% to 50% of many vitamins can be lost, but over time these losses continue in the package.

The longer the shelf-life, the more loss. These losses have to be predicted in the beginning to deliver good nutrition throughout the shelf-life. Over time, fats and oils are targets to oxygen and without great protection by antioxidants, fatty acid content is reduced while negative rancidity compounds increase. This can lead to an unwholesome and strong-smelling, nutritionally-suspect food.

When soft-moist foods were first launched in a hamburger and mixed meat consistency, the water and meat content was highly attractive to insects. The typical plastic wrap was not enough to stop entry and a second over-wrap was necessary. Without the right packaging, these soft morsels turned into mite heaven.

How can packaging help nutrition?

Packaging must create a barrier against harm. More specifically, packaging must ensure safety and nutritional efficacy. How?

Reducing the amount of oxygen

This can be accomplished through minimizing the headspace and then flushing with nitrogen to remove oxygen. The elimination of oxygen reduces the potential of fat rancidity. This does not completely stop the loss of vitamins.

Complete removal of oxygen in meat systems does extend shelf-life and reduce bacterial growth. Complete removal of oxygen in dry kibble products has been marketed in brick-like format, but these packages are challenged with pin-holes allowing oxygen penetration. Additionally, these packages have no 'give' and can be a hazard at high weights. Popular dry meat snacks may need oxygen absorber packets to scavenge any oxygen in the package. [▶ SEE NEXT PAGE](#)

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Website: www.chinaluscious.com

Add: Advanced Industrial Park, Yangkou Town,
Shouguang City (South of Zhongxin Road, East
of Chuanbo Road), Shandong, China



Reducing any access to insects

Some packaging prevents the potential of penetration. If insects do enter, they eat the very nutrition being delivered to the pets leaving webs, waste and insect protein for the pet. As an example, poly-woven packaging is durable and attractive, but it is sewn shut. Sewing holes in the package allow insects to enter forcing even tighter warehouse and retail controls to limit risk.

Controlling moisture penetration

Of course, this must mean that moisture was first controlled well in the process. Mold and bacteria cannot be fully eliminated as they continue to grow (slowly) at low water activity. Depending upon the target water activity and texture, the microbial control system employed must be changed to best protect the food's safety and nutrition. Bacteria and molds grow off the same nutrients being delivered to the pets thus reducing the nutrients in the food. Losses of many nutrients can occur at low moisture levels where molds are slow growing.

Packaging and products must withstand high heat

As temperatures rise in warehouses and in trucks in locations with high temperatures, the packaging must not be a further challenge to sweating or chemical release.

Dry kibbles shipped at high moisture content can lead to internal sweating in the packaging during shipments in hot, humid environments. If moisture concentrates or transfers in the package, the likelihood of mold and mold toxins rise. Dry kibble shipped into high humidity locations can act as a sponge to capture moisture thus creating potential microbial growth. Packaging must support the elimination of that possibility. High heat also liquifies fats and oils allowing them to 'seep' out of sewn packaging.

Warehousing must be controlled

Proper turnover of foods, insect prevention, microbial reduction plans and good ventilation help deliver the nutrition designed. Rooms may have dead-zones with poor turnover creating hotspots further impacting nutritional viability. Warehouses should be designed for the packaging used.

Packaging does have an impact and it must be designed properly to meet the nutritional product to support safe, nutritious performance. ♦



Dr. George Collings
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Based on its long experience in the field of woven plastic packaging, engineering company Starlinger has developed a packaging solution cut to the needs of the pet food industry.

Safe packaging solutions

A provider of machinery and process technology for woven plastic packaging production and plastics recycling and refinement, Starlinger focuses on packaging product development and offers packaging solutions for a wide range of industry applications.

To ensure that pet food and nutritional supplements do not spoil or are infested



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From bottle to bag

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bags offer a sustainable packaging alternative for all pet food producers who want to contribute their share to reducing waste and CO² emissions. Food-safety is guaranteed thanks to Starlinger PET decontamination technology.

Through its focus on technological research as well as continuous machine and product development, Starlinger has become a world leader in the field of woven packaging. With the focus on high-precision production as well as reduced raw material and energy consumption, packaging producers benefit from low production costs and the high production efficiency of the company's machinery.

Starlinger supports customers with comprehensive knowledge and experience, both technologically and with regard to markets and applications. As a family-owned enterprise established in 1835, it places a high value on long-term success not only for its own company, but for its clients as well.

Close to you

With an export quota of over 99.5%, Starlinger delivers to customers in more than 130 countries. Branch offices are located in Brazil, China, India, Indonesia, Russia, South Africa, Uzbekistan and the United States; in other countries the company is represented by agencies. ♦

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Industrial Packaging Veneto ITALY

People and pack

Industrial Packaging Veneto offers innovative solutions in pet food packaging.

Philosophy

The challenge of Industrial Packaging Veneto (IPV) began in 2004, when the name and experience of Industrial Packaging teamed up with Simone Palma's entrepreneurship. Together, they created Industrial Packaging Veneto, which in a short time would become a reference point for the Triveneto area in the production and sale of primary packaging in the food sector.

In 2008, the company decided to invest in the pet food project, where Simone Palma would be able to finalize the skills acquired in the field of mating and printing, bringing the sector to extremely high levels in terms of both the quality of the product itself and their customer-guaranteed service.

The key to the success of Industrial Packaging Veneto is its philosophy: always focused on customer needs, demonstrating day-to-day reliability,

availability, technical support, and of course quality, with continuous research and development.

Customer relations at the core

One of the fundamentals of its philosophy is customer relations. It is crucial to build a relationship of complete synergy with the customer, who is accompanied at every stage of the order and who relies entirely on our experience. IPV helps to choose the best technology, so that packaging facilitates packing operations to protect your contents. In addition, the company's services help to choose the most suitable proposals that communicate in the most effective way by positively orientating the choice of the final consumer.

This company can customize every type of packaging, with its constant search for innovative solutions, offering new materials and customizations meeting even the most demanding requirements.

Client service

IPV develops, under one centralized management, all stages of the packaging chain, extrusion of polyethylene, printing, coupling, pre-forming the bag or coil, right up to delivery of the finished product. Well-trained and skilled staff monitor every stage of the process, including quality control; a real high-level team which is always oriented to excellence.

Plastic materials

The company's plant uses the latest generation of machinery. Furthermore, a newly opened white room was recently installed for the production of special plastic materials which meet the highest quality standards of the European Community. ♦

♦ **Industrial Packaging Veneto S.r.l.**
info@ind-packveneto.com



petMaxi PORTUGAL

HappyOne Mediterraneum: superior pet food with fresh egg and without cereals

HappyOne Mediterraneum was inspired by the mediterranean style, and contains fresh meat and eggs, but no cereals.

The recipe contains the best biological animal protein: fresh poultry meat.

Additionally, it includes fresh eggs, sardines, vegetables, and is enriched with natural antioxidants from fruit.

An added innovation is the introduction of fresh eggs.

Egg protein, ovalbumin, is considered the standard or reference protein. By using it fresh, it is possible to preserve the high nutritional value of its ingredient to the maximum.

We believe that this mediterranean style diet is the best way to prevent obesity and provide a long and healthy life for dogs and cats.

Maxipet, Lda
geral@petmaxi.pt
petmaxi.pt

Dolina Noteci POLAND

Get to know us! Product quality care of Dolina Noteci

Dolina Noteci knows how to care about animals' palate. The team of experienced and qualified technologists watches over pet food recipes, their tastiness and positive influence on the organisms of dogs and cats.

As a trustworthy company, Dolina Noteci informs its customers about the composition of their pet food. Besides that, as one of few manufacturers, the company makes pet food research results available to the customer, conveying as much information regarding nutritional values as possible.

The quality guarantee of Dolina Noteci's pet food is embedded in the Quality Control sign placed on each product, which ensures that the pet food from Dolina Noteci has been carefully and strictly controlled at each stage. Therefore, raw materials undergo a multi-stage selection process and the production itself is monitored at all times.

Dolina Noteci

petfood@dolina-noteci.pl
dolina-noteci.com





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Le Petit Treat, LLC
 info@petit-treat.com
 petit-treat.com



The product line **NIKI NATURAL BARF** is born by observing dogs and their habits, because every dog must feel free to act and **GIVE VENT TO OWN INSTINCTS**; is born of interest in nature and everything that can be considered uncontaminated.

NIKI NATURAL BARF products have been manufactured following these principles, while maintaining the essential balance of animal raw materials. We don't throw away anything of the prey, nothing has to be discarded, all the elements that make it have a function and are indispensable for the well-being of our dog.

The products of the NIKI NATURAL BARF line are not cooked but remain raw, they are **SIMPLY DEHYDRATED** at low temperatures to preserve the scents, odors and texture they had originally.



Croci ITALY
Niki Natural BARF

Niki Natural BARF products have been manufactured based on the belief that dogs should feel free to follow their natural instincts. The products contain an essential balance of raw animal ingredients. No part of the animal is discarded, as all individual components have a function and are indispensable to the well-being of the dog. The products are not cooked but remain raw. They are simply dehydrated at low temperatures to preserve the original scents, odours and textures.

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Farm Food THE NETHERLANDS

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Farm Food Fresh Menu is a complete and gently steamed fresh meat menu for all dogs from pup to senior. The product contains human-grade animal ingredients, no poultry, bone or gluten. No artificial additives. It is a good source of natural prebiotics for healthy and stable gut flora. It is very appetizing for your dog and the digestibility is optimal.

Farm Food B.V.
info@farmfood.com
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Golden Eagle Petfoods UNITED KINGDOM

Golden Eagle fresh meat

Clean complete food designed for adult dogs needing extra boost from high protein contents of fresh meats. The Golden Eagle Fresh Meat is a hypoallergenic diet, as it is grain free and does not contain any ingredients blamed for allergic reactions. Available in three tastes: Farm Formula 35/18 – Duck and Turkey, Ocean Formula 33/16 – Salmon, Herring and Trout, and Wild Formula 34/17 – Venison, Herring and Rabbit.

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



Shandong Luscious Pet Food Co., Ltd CHINA
Tasty and natural pet treats

New snacks are coming: cheese knot (duck), dental knot (chicken) and chicken biscuit with millet and carrot, or with millet and seaweed. Founded in 1998, Shandong Luscious is one of the largest pet treats manufacturers in China with 2,300 employees and its own chicken farms, duck farms and slaughterhouse. Their extensive product range includes dry meat snacks, dental chews, biscuits and canned food. Shandong Luscious received HACCP, ISO9001, BRC, SMETA, BV, GMP certificates.

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



Gloria Pets SPAIN
Snackys: a new range of treats

The Spanish brand Gloria presents its new range of treats: Snackys. These high quality treats for dogs are made in Spain. With 70% fresh meat (60% on the puppy range) and a gluten free formula, this is the best snack to reward your best friend. Available in chicken, turkey, foie-liver, Serrano ham, fish, beef and puppy varieties. Gloria is active in fifteen countries and is looking for new partners worldwide.

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A food industry context for pet nutrition trends

The human-animal bond phenomenon continues to be a catalyst for growth in the pet industry. Not coincidentally, many pet foods entering the market are directly reminiscent of human fare. This is partly because pet owners look to pamper their companions.

Wellness and health as shopping driver

A Packaged Facts survey in early 2017 shows that 79% of dog owners in the US and 63% of cat owners enjoy purchasing products that pamper their pets. Health and wellness is a related if more substantive shopping driver for pet owners. The survey found that 75% of US pet owners are willing to pay more for pet food products that are healthier for their pets.

In the nutrition arena, 'natural' remains the pathway to growth. Many consumers believe that natural products are better for their pets, a belief evident at the checkout line, especially in pet specialty stores though increasingly at mass retailers too. Packaged Facts estimates that U.S. retail sales of natural pet food products reached \$8.2 billion in 2016, reflecting a 2012-2016 compound annual growth rate of 12%, and thereby accounting for a fourth of the total

retail category. According to data from GfK, natural products account for around 70% of dollar sales in the pet specialty channel.

Individual nutrients

At the individual nutrient level, the major trend has been a focus on protein content, source, and quality. Just as pet owners seek newer and better proteins for themselves, they also seek them out for their pets. A pet owner survey in December 2016 shows that protein is the most important product formulation attribute for pet food shoppers, with 43% considering it among the most important factors in choosing what they buy.

A litmus test for consumers seeking high-quality pet food, therefore, is that the ingredient list that begin with a meat, poultry, or fish/seafood protein, rather than a grain.

Pet food and packaging

Pet owners are concerned about preventive health care for themselves and their pets, and these concerns often tie in with life stage.

In the wake of the low-carb and gluten-free dietary trends in the larger food marketplace, grain-free pet food formulations have become commonplace in the US market, and are a must-have component for natural pet food product lines. GfK has reported that half of all new pet food items are grain-free.

Free-of claims

Several other free-of claims have been proliferating, including gluten-free, corn-free, soy-free, non-GMO, potato/starch-free, and claims of no by-products, artificial ingredients, et cetera. Data show that top free-of claims used by dog owners are no fillers/by-products and artificial ingredient/colour/preservative-free. For cat owners, the top free-of claim is no fillers/by-products.

DOG AND CAT OWNERS CURRENTLY USING PET FOOD: BY FREE-OF CLAIM, 2017 (%)

Free-of claim	Dog owners	Cat owners
Artificial ingredient/colour/preservative-free	30	25
No fillers/by-products	30	25
Grain-free/gluten-free	28	24
Corn-free	26	22
Non-GMO	25	24
Soy-free	22	17
Low carb/low glycemic index	18	16
Potato-free/starch-free	17	17

Source: Packaged Facts National Pet Owner Survey, February/March 2017 National Pet Owner Survey

In addition, many companies have been using the term 'ancestral' or 'paleo' or 'wilderness' to describe diets reminiscent of how dogs and cats ate before they were domesticated. Taking inspiration from the human trend, these products offer the benefit of high-quality protein, which often coincides with a grain-free formulation.

Weight management

Another important nutritional angle is senior/weight management. Packaged Facts estimates that US retail sales of senior/weight management pet foods at \$3.2 billion. Pet owners are concerned about preventive health care for themselves and their pets, and these concerns often tie in with life stage. The 2017 survey shows 76% of dog owners and 71% of cat owners, more than in previous years, agreeing with the statement 'High-quality dog foods/cat foods are effective for preventive health care.' In fact, barely any disagree with the statement.

Combining the level of attention that owners give to pet well-being, with a market environment of ongoing quality innovation and product safety concerns, the nutrition, dietary, and even culinary trends remain fertile fields for new product development. This especially applies to premium- and super-premium quality pet food offerings. ♦



David Sprinkle

Research Director, Packaged Facts
dsprinkle@marketresearch.com
packagedfacts.com



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Mister Pet ITALY

Fifty years of love for animals and respect for nature

Producing wholesome, well-balanced and tasty animal foods that contribute to the health and longevity of our pet friends, is Mister Pet's mission.

A bit of history

It all began in 1838 on a little family farm in the Reggiano Apennine hills, where cattle, sheep, pigs, poultry and rabbits were kept. Nearly two centuries have passed and today, the Gambarelli family is one of the leading producers of high-quality, environmentally friendly animal foods.

Mister Pet's mission

Founded in 1995, the company is firmly rooted in the traditions and experience of the Gambarelli family, where expertise in animal nutrition has been handed down from father to son over the course of three generations.

In 1995, Mister Pet was established by Enzo Gambarelli, the brand's founder and first general manager. Initially, Mister Pet focussed on natural food and dried snacks, but in 2008 the company broadened its scope to include highly-

nutritional and high digestibility food products, maintaining the original commitment to large quantities of fresh meat in its recipes.

True to tradition

The family's love of animals and passion for its mission as a company also explains why Mister Pet has always invested in research and values the collaboration with universities, veterinarians and scientists. The company firmly believes in innovation, continually embracing new technologies that allow for the creation of pet foods containing high volumes of fresh meat or fish and supporting the natural feeding patterns of cats and dogs.

Homemade quality

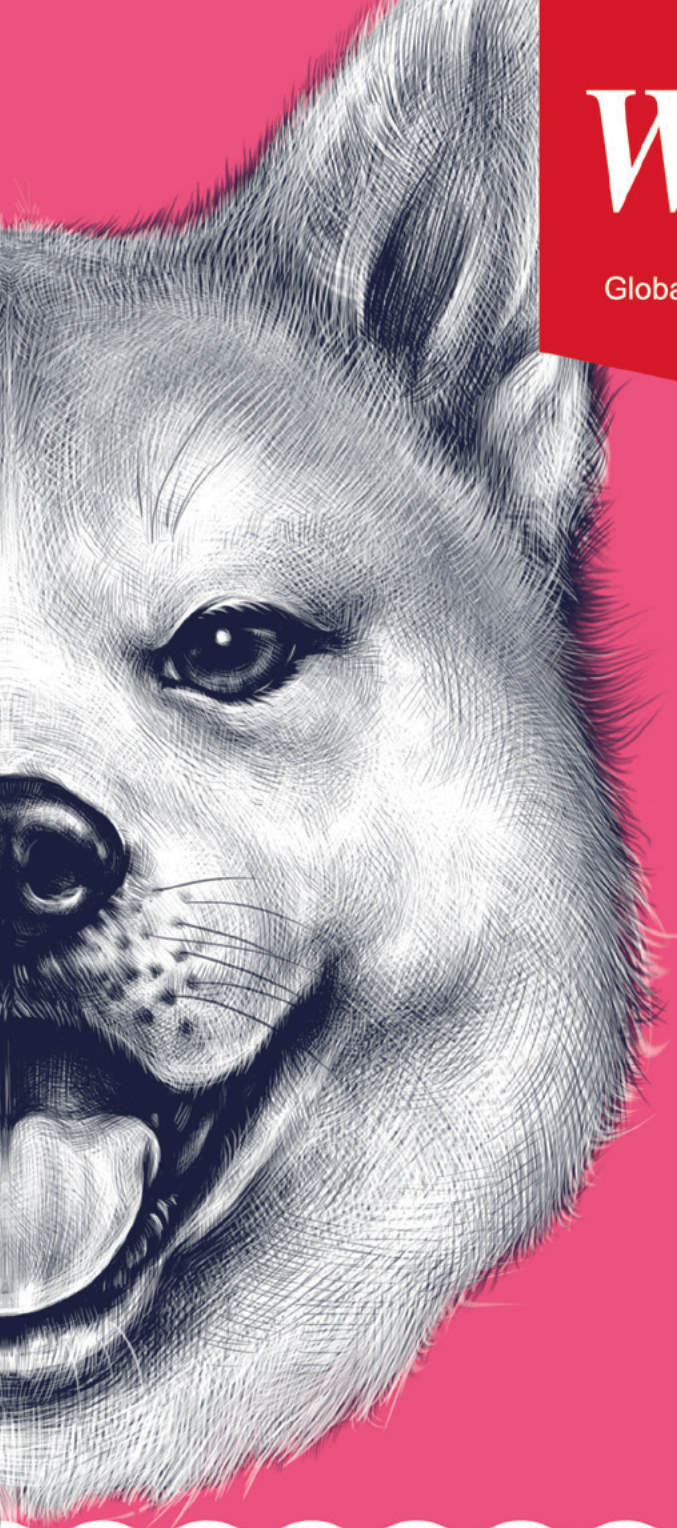
Working in the tradition of homemade foods, as if from a family kitchen, Mister Pet meticulously controls the quality of its products and ingredients, committed

to optimizing all production processes and paying attention to each and every detail. Systematic in-line checks, strict procedures in every stage of the production process, International Quality Certifications (ISO 22000 and IFS Food) and full traceability of all ingredients, guarantee the outstanding quality of Mister Pet's products.

Caring about the future

All Mister Pet's products are manufactured with the use of renewable resources, green energy (solar panels) and environmentally friendly techniques (air and water filtering). ♦

♦ **Mister Pet Srl**
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Gosbi Petfood SPAIN

Unique philosophy and commitment

Gosbi is an emerging, fast-growing, innovative pet food producer specializing in highly nutritious products from its own kitchen. The company is committed to producing high-quality food that pet owners can trust, now and in the future.

Quality is fundamental

Gosbi uses natural ingredients, with as little processing and as much freshness as possible, to keep the nutritional properties intact and provide exceptional palatability. This is fundamental to Gosbi's philosophy.

The secret and key to Gosbi's quality is the correct balance between ingredients, in particular between macro- and micro-nutrients, whose exceptional benefits can only succeed through the high-quality sourcing of each single ingredient and the control of the entire production process.

The company 'cooks' its food following its own unique method at a low temperature (max. 90°C) achieving high protein digestibility. Gosbi has developed its natural foods based on the Mediterranean diet, which is one of the best options for a healthy life. The Mediterranean diet

improves life expectancy and quality of life, thanks to its content of natural and nutritious ingredients.

A packaging revolution

Gosbi is fully focused on the independent pet-specialty channel, providing customer education and advice, explaining the benefits of their high-quality, cooked food. In order to enhance transparency, Gosbi has introduced a unique way to show the ingredients and the composition on their product packaging, using illustrations and percentages which are easily legible. The ingredients list on the back of Gosbi's pet food bags has brought a genuine revolution to the market: there is nothing similar in the market.

Roadmap

Gosbi Petfood is a family-owned business with strong ethical values. Innovation and investment in quality are leading

the company on an exciting journey of commitment, international expansion and growth. Gosbi's roadmap is clearly marked. They are investing in a new kitchen that will be ready in the first quarter of 2018. This new kitchen will be one of the most innovative pet food production sites in its field. It will support continuous international development and high demand.

People are essential to Gosbi's future and for this reason CEO Isaac Pares has proudly appointed Fabrizio Spena as International Sales Director to lead the development of Gosbi's international brand awareness. ♦

♦ **Gosbi Petfood SA**
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www.dokas.eu



Dokas GERMANY

Improving the lives of dogs and cats

Founded in Essen in 2006, Dokas has, from the outset, focused its attention on developing premium snacks that both pets and their owners will love.

A healthy snack

Snacks play an important role in feeding pets these days. A reward or a treat every now and then is part of a dog's or cat's diet. However, a healthy diet is becoming ever more important. For this very reason, snacks do not just have to be tasty so that pets will love them, but they also have to be easily digestible and easy to handle. This is why Dokas pays close attention to the quality and production of their snacks, and is very meticulous when it comes to selecting ingredients and producing the best possible snacks.

High quality products

The company's philosophy for developing products is: "Only high-quality products improve the quality of life of pets and contribute to their well-being." Dokas manufactures snacks only in production facilities that are inspected by independent

institutions and meet the company's high quality requirements. To go above and beyond the usual standards with its quality requirements is par for the course.

For that reason, dog and cat snacks made by Dokas are also subject to regular quality inspections by SGS Institut Fresenius. This independent testing institute enjoys an excellent reputation for its food quality inspections and offers many years of experience in this field. This voluntary inspection programme therefore guarantees consistently high quality products, which the company can visibly indicate on its products with a symbol.

A new selection of treats

With this in mind, Dokas has developed an exciting selection of snacks over the last few years which they are constantly striving to complement with innovative

new products. The product range stands out because it spans the entire spectrum, from quickly-consumed rewards, to treats that offer hours of chewing. There is something there to suit every taste.

With the recently rolled-out, relaunched packaging, Dokas aims to enter other European countries as well in order to continue their success story and trust in its brand. The product quality should be visible, which is why the window remains large in their new packaging. ♦

♦ **Dokas Handelsgesellschaft mbH**
info@dokas.eu
dokas.eu



Founded in 2004, Italfeed is an **italian company**, which borrows its experience from the market of food supplements.

Our mission is to deal in raw material of **natural origin, technologically advanced products** for the well-being and beauty of our pets.



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Advocating for pet food safety

PFI discusses pet food policies and priorities in the Trump administration.



Advocating for product safety

The Trump administration has brought to Washington a legislative and regulatory agenda that includes new objectives to regulations, budget and trade. The Pet Food Institute (PFI) is actively engaged with administration policymakers and regulators on initiatives that could impact pet food and treat production in these regards.

Whether on Capitol Hill, at the US Food & Drug Administration (FDA), the US Department of Agriculture or state agencies across the country that regulate pet food, PFI is advocating for risk-based policies and regulations that support product safety.

Food safety enforcement

Congress is currently in discussions and negotiations on annual funding for FDA, the regulatory agency charged with enforcing compliance with the Food Safety Modernization Act (FSMA). Under FSMA, pet food and treat makers are required to develop and implement Current Good Manufacturing Practices at manufacturing facilities. In addition, they are required to identify and evaluate known or foreseeable hazards in the manufacturing process, establish preventive controls for those hazards and document those actions accordingly.

Inspectors from FDA have initiated FSMA compliance and enforcement activities, and are visiting pet food and treat facilities to ensure they are meeting FSMA requirements. In order to ensure regulatory transparency and predictability for pet food and treat makers, it is critical that FDA have adequate funding to properly train their inspectors. As budget discussions for the agency continue, PFI will remain vocal in advocating that FDA and state agencies receive the funding they need to carry out FSMA compliance and enforcement activities effectively.

International trade

The Trump administration recently gave notice to Congress of its intention to renegotiate the North American Free Trade Agreement (NAFTA). The success of the US food and agriculture sectors is to a large extent attributable to free trade agreements such as NAFTA. Among the nations with which the US has free trade agreements, Canada and Mexico are the first and second export markets for US feed and feed ingredients, including pet food. These two countries alone account for nearly half of all American pet food exports annually.

PFI have identified ways in which this 23-year-old agreement can be modernized and enhanced, without endangering the gains NAFTA has provided to US food and agriculture producers and exporters. These proposed updates to NAFTA include adopting or incorporating the World Trade Organization Sanitary and Phytosanitary Standards Agreement, and developing and implementing a NAFTA e-certificate system that would make the export process more efficient, via internet commerce.

Educating and advocating

Each incoming presidential administration brings new priorities, objectives and personnel to Washington, DC. PFI is currently educating and advocating for science-based policies and regulations that support the manufacture of pet food, and we will continue to share with the Trump administration our vision for US pet food and treat production and trade. ♦



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Ingredients and production

Balancing the benefits of pets in society with sustainable, responsible pet ownership and care is a responsibility. Pet owners should also protect their animal's health from lifestyle and environmental influences that can cause obesity and diseases.

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Sustainable and responsible pet ownership



Balancing the benefits of pets in society with sustainable, responsible pet ownership and care is a responsibility, not only of pet owners, but of a variety of stakeholders such as veterinarians, pet food producers, governments and educators.

Different roles of dogs and cats

Dogs and cats play many useful roles in 21st century society. Cats, for example, are kept both as pets and for their fabled pest control ability.

When we consider dogs, we find their roles in society are more extensive, including:

- Working animals such as farm dogs, rescue service dogs, sniffer dogs, security dogs.
- Companions and 'assistance' dogs, for example guide dogs for the blind and medical alert dogs.

In addition, dogs and cats also bring health benefits to pet owners like stress reduction, combating obesity and reducing blood pressure. Pet ownership also teaches children how to care for others.

On this basis, there is a strong case for society to demonstrate responsible pet ownership and duty of care towards our pets. Failure means that we do not benefit fully from pet ownership and that pet ownership is not sustainable in the long term. However, meeting these responsibilities requires input from a combination of stakeholders.

Ingredients and production

There is a strong case for society to demonstrate responsible pet ownership and duty of care towards our pets.

Dog poop – a 21st century problem

I recently tried to attend an amateur rugby union match in the beautiful English countryside with my daughter and her 2-year old rescue French Bulldog. Unfortunately, we were prevented from entering the sports ground. Although unpleasant, the reason was both simple and complex, the problem of dog poop. In denying us entry, the sports club was showing responsibility towards their members and public resulting from some irresponsible dog owners' failure to 'scoop the poop' and clean up after their dogs. It is well known that dog faeces are a vector of pathogenic bacteria and parasites and failure to 'scoop the poop' increases the risk of transferring pathogens from dogs to humans.

Globally the dog poop problem is significant, with recent surveys indicating that major global cities generate up to 250 tonnes of dog faeces a day. However, effective control is complex. Not only should pet owners clear up after their dogs but they require support from diverse stakeholders.

The role of the pet food industry includes:

- Designing and making dog food that promotes gut health and produces acceptable stool quality.
- Digestibility testing to ensure efficient use of raw materials.
- Ensuring raw material sustainability through responsible sourcing, to ensure long term use of beneficial raw materials in products.

The importance of raw material testing and sustainability will be featured in the november and december issues.

Other key stakeholders in effective dog faeces control include, veterinarians for their role in ensuring gut health, pet retailers/pet industry associations for educating pet owners and

governmental authorities for provision of faeces disposal facilities like dedicated waste bins or converting dog poop into biogas.

Ensuring long-term benefits of pets in society

Responsible pet care requires more than faeces control alone. Apart from foraging for food, which might not be safe to eat, a pet can not care for itself when it comes to health and wellbeing. Fundamentally, pets can't effectively control dental health, trim their nails or ensure they remain parasite free, so pet owners must take responsibility for these tasks.

Ensuring the benefits of pets in society are sustainable in the long term, requires that we ensure the healthy longevity of our pets. There are many aspects to this and our understanding of pet health is constantly evolving.

In ensuring healthy longevity many other stakeholders across the pet sector are involved, including:

- Veterinarians who promote and provide pet health services.
- Pet retailers/pet industry associations role who promote healthy nutrition.
- Pet food manufacturers who design and manufacture safe food that promotes healthy longevity and communicate 'Best Practice' pet food storage, to minimise the risk of illness in pets and humans.
- Pet owners who ensure responsible feeding to control the growing problem of pet obesity.

► SEE NEXT PAGE

EVERY STEP, ASSURED



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Feral and free-ranging dogs and cats

Sustainable pet ownership is under threat from feral and free-ranging dogs and cats. Published estimates indicate a 'feral' global population of more than 200 million dogs and over a 100 million cats. Controlling this population is important for ensuring healthy pets and humans in society. Responsible population management techniques include education, sterilisation and the more controversial use of euthanasia. Here the major aim is to control zoonotic disease transmission, including parasitic, viral and bacterial diseases, between feral and domestic cat and dog populations and from 'ferals' to humans.

The importance of education

The role of education in promoting responsible pet care should not be underestimated. Many governmental and non-governmental agencies, pet industry associations, charities and veterinary organisations such as 'German Pet Trade & Industry Association' (ZZF), 'Blue Cross' in the UK, 'American Veterinary Medical Association' (AVMA) and the 'World Organisation for Animal Health' (OIE), all help promote this.

Education is also an important part of the 'One Health' initiative which promotes the benefits of owning pets towards controlling a wide range of human medical conditions like hypertension and mental health improvement. However, if as a society we fail in our duty to look after our pets' health and wellbeing then ultimately our own health might well suffer.

Whilst the scope of the OIE is wide ranging and includes livestock, working and companion animals, their aims and mission statement 'Protecting animals, preserving our future' summarises the importance of working together to promote responsible pet ownership as this recognises the importance of pets in 21st century society.

Without input from the broad coalition of stakeholders, responsible pet ownership is not sustainable and it can be argued that failure will result in society not gaining the widespread benefits associated with pet ownership. ♦



David Primrose

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The 'One Health' view of pet ownership

**How do pets and their owners mutually affect each other's health?
We all know about the joy and love pets bring into our lives.
But what is often overlooked, are the health risks connected with
pet keeping, like zoonotic diseases.**

Health risks of pet ownership

Zoonotic diseases are infectious afflictions caused by viruses, bacteria, parasites or fungi and transmitted from animals to humans. Transmission is usually the result of direct contact, but can also occur indirectly (through objects or surfaces), vector-borne (by ticks, fleas or mosquitoes) or by faecal-oral infection (via contaminated food or water). According to the Center for Disease Control and Prevention, in the US alone, tens of thousands of people are afflicted by zoonotic diseases every year – ranging from Lyme disease and West Nile virus to E. coli and salmonellosis.

Studies on the awareness of zoonotic diseases show that, although most pet owners are generally aware

of the risks, there are definitely knowledge gaps. A 2014 study by Sandhu and Singh, conducted in the city of Ithaca, New York, revealed a serious lack of understanding on the subject of vector-borne diseases. Many pet owners underestimate the importance of regular deworming and prophylactic flea and tick control.

Similar attitudes among pet owners in The Netherlands were found in a study by Overgaauw and others in 2009. According to their data, 45% of cats are allowed on kitchen surfaces, 39% of dog owners never clean up the faeces of their dogs and only 15% of dog owners and 8% of cat owners always wash their hands after contact with their animals.

Ingredients and production

Sandhu and Singh also revealed the “lack of practice among physicians to discuss zoonotic diseases with their clients”. Respondents listed veterinarians as their primary source of information on zoonotic diseases, followed by friends and relatives, while none mentioned their family doctors. Physicians, it seems, are primarily focused on their patient’s symptoms and rarely take the opportunity to educate pet owners on zoonotic diseases. Or maybe they themselves are not – sufficiently – aware of the connections between human and animal health.

Health benefits outweigh health risks

Nevertheless, it seems that the health benefits of pet keeping outweigh the health risks. There are numerous scientifically proven health effects of owning a pet, such as the reduction of blood pressure, triglyceride and cholesterol levels, improved immunity, anxiolytic and antidepressant effects, increased physical activity, improved diabetes control and a better overall health.

Interestingly, companion animals and people living together share similar gut microbiota, microbe populations living in our intestines. People, especially babies, living in households with a dog, apparently have microbiotas that contribute to the reduction of allergies and asthma. And if we consider the fact that gut microbiota also affects various brain functions, the human-animal bond becomes even more captivating.

An increasing amount of data confirms the beneficial effects of pets on conditions like autism, posttraumatic stress disorder, Alzheimer’s disease and dementia. Not just service dogs or therapy dogs, but normally trained family pets as well, can be of great help to children with developmental problems. In general, companion dogs can support a child’s physical and psychological development.

The importance of responsible pet ownership

It is clear how pets can contribute to improved health and longevity in their owners, but only on the essential condition of responsible pet ownership. Pet owners have the responsibility to protect their animal’s health, not just from infectious diseases, but also from lifestyle and environmental influences that can cause obesity, diabetes mellitus and cancer.

To put it more directly, pets are at great risk of their owners’ tendencies toward bad habits. Smoking, alcoholism, poor diet and lack of physical activity will lead to health deterioration of the whole family, companion animals included. The ‘One Health’ concept recognizes the interconnection between the health of people, animals and the environment, and the human-animal bond and diseases we share with our companion animals are an essential part of this perspective.

Responsible owners will provide their pets with all the appropriate prophylactic health care, nutrition physical activity and affection they need. They will be “the person their dog thinks they are”. And by being that person, they will be able to enjoy all the benefits of pet keeping for a long and joyful time. ♦



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Twenty years of success



In May 2017, Diana Pet Food celebrated its twentieth anniversary. Over the first twenty years of its existence, the company has become the global leader and pioneer of high value solutions to improve pets' well-being and pet owners' satisfaction.

A success story

Diana Pet Food was founded in 1997. It began activities with the production of palatants for dogs and cats. At that time, the company adopted a strategy that quickly raised it to the number one position in the palatability market. From the very start, the company has invested heavily in research to develop a unique expertise in dog- and cat feeding behaviour. Simultaneously, Diana Pet Food has focused on building a wide global network with both industrial- and sales presence.

This approach has enabled the company to stay close to its customers and adapt its offer to local market expectations.

20 years later, with a global presence on 5 continents, 950 employees, 18 industrial sites and 18 sales offices, the business model has proved highly successful. The company, which has been part of the Symrise Group since 2014, has evolved to provide multiple products and services in the fields of pet food palatability, pet health, pet food protection, and pet care.

A clear vision of the future

To further this outstanding development, Bertrand de Launay, who has been the CEO of Diana Pet Food since April 2016, has defined for the coming years a clear strategy that is based on three pillars.

"Firstly, we will reinvent palatability to address new consumer expectations that are emerging from the global 'pet parenting' trend," he remarked. The company is developing innovative pet concepts to please both animal and owner.

Ingredients and production

“We have recently created Petscript®, a universal sensory language to characterise the smell of wet cat food. This unique tool helps customers position their products in an olfactory landscape to create their own olfactory signature,” Bertrand explained. “And in 2018, we will launch an innovative index to assess dog and cat enjoyment. It will allow pet food manufacturers to consider pet owners’ perception of their pet’s feeding experience when evaluating their product performance.”

External growth

The second key pillar in Diana Pet Food strategy is to support the development of its most recent activities by building a strong business model with partnerships and acquisitions.

“This year, we have formed a strategic alliance with Kalsec in the field of pet food protection to offer co-branded natural antioxidants and antimicrobials

under our Videka brand. We also concluded a strategic partnership with Dilumix on natural sugar cane fibres for our Vivae brand, which provides innovative and natural nutrition solutions that visibly improve pet health and well-being,” said Bertrand.

Diana Pet Food has also committed further investment in the pet digital world by increasing its participation in Yummypets, the social network dedicated to pet owners. “Yummypets enables us to offer a wider range of services through reaching out to end-consumers,” added Bertrand. “Alongside other possibilities, we can use the platform to conduct targeted consumer surveys for pet food manufacturers to test their latest innovations.”

Sustainable development

The third pillar of Diana Pet Food strategy is to pursue organic growth by setting up new palatant operations in strategic areas.



Bertrand de Launay, CEO of Diana Pet Food

“At the beginning of 2017, we opened a new factory in Chuzhou, China, reinforcing our presence in the fast-growing Asian pet food market. In 2018, we will expand our European capability with a second drying tower in France, and a new liquid plant in Spain,” said Bertrand.

In 2019, Diana Pet Food will build its first ‘green’ factory. “Alongside the high quality standards and operational excellence implemented in all our subsidiaries, we now want to go further by building sustainable plants that create a positive impact on the environment. Our Colombian plant, eco-friendly from its start, will be designed to support us becoming even ‘greener’ in the future,” concluded Bertrand. ♦

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The recipe is unique, because of the right balance of high quality and 100% natural raw material such as buckwheat, salmon oil, cranberries and MicroZeoGen – natural clinoptilolite that detoxicates and stimulates nutrient absorption. Hence, the novelty Superior Care White Cat makes light-coated cats healthy and free from stains of tears around the eyes.

Ltd Akvatara

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Lintbells UNITED KINGDOM

Celebrating ten years of making top quality natural health supplements

Lintbells is celebrating ten years of making top quality natural health supplements for dogs, cats and horses. Co-founder John Howie says: "Retailers have been able to enjoy the benefits of our brand growth over the last ten years. We look forward to making sure that Lintbells supplements are the movers and shakers in the category, offering retailers repeat business and impressive profits."

The big idea is to create high quality, natural and affordable pet supplements that help pets reach their full potential – developing, perfecting, validating, listening to customers and manufacturing

the best products they can, using ethically sourced premium grade ingredients. It is a commitment the company takes very seriously and has resulted in products that support skin and coat condition, digestive health and joint care.

Lintbells Ltd.

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Better together

For most of recorded history, pets have been part of our daily lives.

From the start, especially dogs offered much more than just furry companionship. They are said to be man's best friends for a reason.



Active role in society

Over time, dogs have proven themselves to be keen guards and competent helpers. When trained as service dogs, they can have a life-changing impact on people in need. Dogs offer affection, contribute to physical mobility and mental stability and – in the case of the more sizeable ones – watch over you and your loved ones. Quick to learn and eager to please, dogs have won their place in our society. We rely on their expert help in police, rescue and border patrol operations, but closer to home some dogs can have an even bigger impact. Beyond protection and partnership, service dogs allow their owners to regain their independence.

Seventy individual skills

Having made it through a careful selection process, aspirant service dogs have to complete a 20-month professional training programme, learning up to seventy individual skills, before they are assigned to assist in medical or therapeutic care. Hulphond Nederland is one of the organizations that takes on the specialist training of service dogs. The foundation provides service dogs to a variety of clients and institutions and does so free of charge. Hulphond Nederland relies on donations and sponsor contracts from commercial organizations.

Regaining independence

At IQI, we value the role pets play in our society. For children, the elderly and everyone in between, pets should be a part of everyday life. To bring the benefits of a service dog within reach of more people in need, and actively support the good work of Hulphond Nederland, we have adopted an aspirant service dog of our own and are committed to foot the bill for its training and education programme.

Regardless of what our puppy grows up to be (helping aid, seizure dog, PTSD dog or therapy dog), we are convinced that he will offer his future owner many social benefits. With a service dog as a companion, people in need become more independent and socially active. With a loyal friend by their side, they are finally able to (re)gain an active role in society. ♦



Ir. Sven Gravendeel

President of IQI Certified Petfood Ingredient
sven@IQI-petfood.com
IQI-petfood.com



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Forum Asia

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GlobalPETS Forum Asia 2017

15 November, Shanghai

A company that creates a culture of innovation is on its way to growth. But how do you create a basis for innovation and creative thinking? What can you learn from global retailers and innovative thinkers? During the Forum, you will receive practical tools to do this yourself.

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Detlef Reis: keynote preview	76



Be creative and innovate!

GlobalPETS Forum Asia 2017 - 15 November, Shanghai

What can you expect?

Innovation is vital for the future of your business. You will learn how to unleash creative thinking and implement a successful innovation strategy. Our Forum is a leading conference for professionals in the pet industry. This is the place to be to maintain and expand your network, and explore new business opportunities. Expand your business horizon!

At the third GlobalPETS Forum Asia, we offer you the chance to immerse yourself in new ways to become a creative and innovative company.

Whether you are a new start-up or an established business, current consumer demands make it essential that you produce and sell your products using a fresh approach. Our keynote speakers will let you experience new ways to deal with innovation and creativity. With the aid of ready-to-use tools, you will create a working business plan that you can implement, giving you the edge to stay ahead.

Meet global retailers

GlobalPETS Forum Asia enables you to meet leading global retailers and discuss the main developments and trends. This panel will be under the guidance of Dave Bolen and includes:

Pet Annex US
Founder and Managing Director
Weilynn Chiang

PetCircle AUSTRALIA
Founder and CEO
Michael Frizell

Pets at Home UK
Trading Director
Lisa Miao

Four Paws RUSSIA
Business Development Director
Dmitry Tsypin



What is in it for you?

- Become a creative thinker and implement a successful innovation strategy.
- Learn from major pet retailers and online platforms from around the world.
- Meet global business partners.
- Combine the event with the CIPS trade show.

Social evening

During the social evening, there will be many opportunities to network with business partners and leading decision-makers in the pet industry from all over the world. This gives you a head start at the CIPS trade show starting the next day. Join us for drinks and discussion at a beautiful rooftop location.

Keynote speakers



Detlef Reis is the founder of the Hong Kong-based company Thinkergy. Thinkergy provides leading corporations and organizations with sophisticated innovation and ideation expertise. Its goal is to train organizations to be more creative and innovative in order to gain competitive edge and increase impact.



Tendayi Viki works for the London-based company Benneli Jacobs, where he helps clients develop an innovation thesis that outlines the arenas they want to work in and the type of innovation they want to conduct. He helps them build

a portfolio of business models with core, adjacent and transformational innovation.

Programme

- 09:00 - 10:30** Detlef Reis: Creative thinking
- 10:30 - 12:00** Tendayi Viki: Lean innovation
- 12:00 - 13:00** Lunch break and networking
- 13:00 - 13:45** JD.com presentation
- 13:45 - 14:30** Dave Bolen: Change in pet retail
- 14:30 - 15:30** Retail panel: Discussion with global retailers
- 15:30 - 17:15** Workshop: Tools for creative thinking
- 15:30 - 17:15** Workshop: Creative methods to improve products
- 17:15 - 18:30** Inspiration from pet industry startups
- 18:30 - 21:30** Social evening and networking

Registration and hotel booking

The fee for participation is €595 (plus VAT). There is a €50 'early bird' discount if you sign up before 1 September 2017. The price includes all breaks, lunch and the social evening, plus a hand-out. Your promotional material in the gift bag: €50 (plus VAT) per insertion.

You can now book your room at the Shanghai Intercontinental Hotel, at a discounted rate. We recommend that you book your hotel well in advance.

For more information and registration, go to globalpetsforum.com or cipscom.com ♦



Join an inspiring retail discussion

Discuss industry trends with global retailers, under the guidance of leading industry professional Dave Bolen.



Dave Bolen is a renowned retailer with more than 40 years of experience in leading marketing and merchandising positions. He served as EVP and CMO at Petco and President and CEO of PetSupplies Plus. Today, he operates as a board member and advisor to leading companies in the pet industry.

Join the experts

We will discuss the challenges and opportunities for the global pet industry. As attendee, you are most welcome to join the discussion and make your experience interactive. We have invited senior business directors of top retail companies:

We will discuss the challenges and opportunities for the global pet industry.



Four Paws RUSSIA

Dmitry Tsybin has been involved with the Russian pet retailer Four Paws since the early 00's and joined the company as its Business Development Director in 2011. He is responsible for the expansion of the retail

chain and the development of services, including digital projects. Four Paws is a leading Russian pet specialty retailer with more than 170 pet stores located in numerous regions of Russia.



Pets at Home UK

Lisa Miao is the Trading Director for Pets at Home with responsibility for buying, sourcing, product development, supply chain and quality assurance. With a background in the food retailing sector, she is

a creative leader with strong commercial acumen. She has been at Pets at Home for two years, having previously worked in senior trading roles both at Asda Walmart and Morrisons.



JD CHINA

Tianyang Fan is the General Manager of JD.com's Pet and Agriculture Department. JD is one of the two largest b-to-b online retailers in China. The company recently announced a partnership

with e-commerce platform Farfetch, which allows for retail of a luxury segment to enter the Chinese online market.



PetCircle AUSTRALIA

Michael Frizell is the founder and CEO of PetCircle.com.au, Australia's largest online pet shop. With industry leading NPS and loyalty metrics, PetCircle is redefining how pet parents shop for pet products in

the region. PetCircle is a highly efficient, customer focused e-commerce business that has grown to become the market leading online pet retailer in Australia since launching in 2011. Looking ahead, PetCircle is focused on becoming the largest pet retailer in the region.



Pet Annex US

Weilynn Chiang is the founder and Managing Director of Pet Annex Inc, a company specializing in developing private brand programs for retailers and distributors. Her expertise in strategic

planning, manufacturing and international business operations gives her a unique perspective on the importance of differentiating a private pet brand in the marketplace. She believes in carefully building an innovative programme by category through a meaningful collaboration with retailer and supplier with a keen emphasis on new product development. ♦

Eight steps to the epiphany



How lean innovation helps companies to make products people want. Tendayi Viki previews his keynote speech and workshop.

Illustrations by Esther Gons for The Corporate Startup

Innovation as a key driver

China and other Asian economies are poised to make the move from being production based economies towards having innovation as a key driver. This shift in strategy also represents a fundamental shift in how businesses will develop products and connect with their consumers. At the heart of innovation, is a deep understanding of customer needs. This understanding informs how products are then created and marketed. Innovation is not just about having great ideas. It is about combining those great ideas with sustainably profitable business models.



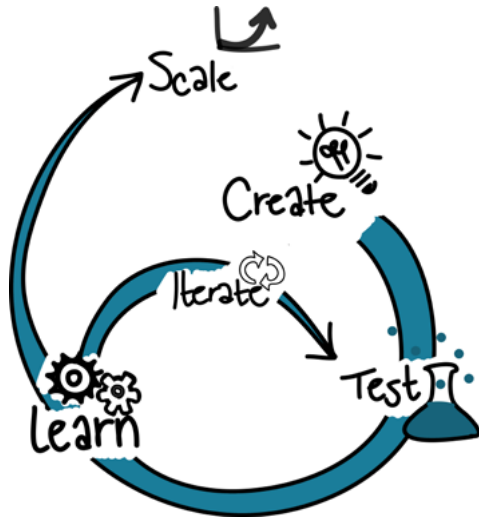
The goal of finding sustainable business models requires innovators to test their ideas before they launch them at scale. This search-oriented approach is different from an execution-oriented approach based on business planning. All innovators need the humbleness to recognize that very few product ideas

ever succeed in their original form. Most successful startups had to pivot and iterate their way to success. Indeed, the research shows that the number one reason for products failing in the market is premature scaling (i.e. launching a product before testing it with customers).

The innovator's rhythm

When we encourage innovators to test their ideas, we are not asking them to simply throw things against the wall and see what sticks. Innovation is a systematic process that has a rhythm to it. This rhythm is best represented by the 'create-test-learn loop'. What this means is that before we start testing ideas with customers, we have to make explicit what our business model assumptions are.

Every business plan has within it several assumptions about customer needs, purchasing behaviour and potential channels to scale the product. We have to identify and prioritise these assumptions before we begin testing. Once prioritization is done, we can now systematically test each assumption and compare it to real life evidence.



This innovation rhythm can be used to navigate through the riddle of innovation and solve the equation presented at the beginning of this article. We can run experiments to test whether customers have the needs we assume they have.

We can also test if we are building the right solution for them. Finally, we can run experiments to test all other aspects of our business model including pricing, costs, channels, and key partners. The ultimate goal is to create products people want and figure out a way to deliver that value profitably.

Eight steps to the epiphany

The lean innovation process for testing product ideas will now be described in a little more detail. In practice, there are eight key steps that are involved in each experimentation cycle. Innovators need to master each key step in order to succeed:

1. Capture ideas: Map out your Plan A. Describe your initial thinking about the business model you will use to take the product to scale. Rather than writing a business plan, use a visual tool such as the business model canvas.
2. Identify assumptions: Review your Plan A for any untested assumptions. In every plan, there are knowns and unknowns. Your goal is to identify the unknowns within your initial business model.
3. Prioritize assumptions: Identify those assumptions that are most critical for success. These can also be described risky assumptions. These are the assumptions that if it turned out we were wrong, we would have to seriously rethink the project. Our goal is to identify our riskiest assumptions and make plans to test those first.
4. Brainstorm tests: After we know which assumptions to test, we can start thinking about how we are going to do it. What is the smallest thing we can do tomorrow to start turn that assumption into knowledge? There are several methods that are available to innovators within the design thinking and lean innovation toolbox. These range from customer interviews, contextual observation, minimum viable products and A/B testing.
5. Falsifiable hypotheses: Before we run our chosen experiment, we have to benchmark our minimum fail criteria. We have to decide as a team upfront what we expect to happen during our test, and the minimum criteria for deciding that our assumption is not supported by the data. Our chosen minimum criteria should be made explicit and displayed for everyone in the team to see.
6. Get out of the building: We are now ready to run our experiment in context. We have to get out of the building to test our assumptions with real customers. There are no facts in our office. In order to understand our customers, we have to test our ideas in their context.

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7. Capture learning: Once our research is complete, it is time to review our results. Does the data support our assumptions?

We can use our minimum fail criteria to perform this review. We should also explore our data for any new unexpected learnings that emerged while we were out of the building.

8. Make decisions: On the basis of our outcomes, we can decide what to do next. If our assumptions are supported by the evidence, we may decide to continue developing our idea and move on to testing the next set of assumptions.

If our assumptions are not supported by the evidence, we have the choice to change or adapt our business model (i.e. pivot), or stop the project altogether.

Conclusion

These eight steps are to be repeated until we are confident that we have found the right business model for our product. Finding the right business model is something all innovation teams must do before they launch their products at scale. The power of lean innovation is that it saves us from making large leaps of faith that may lead to monumental failure. If companies in China and other Asian economies want to successfully make the move from being production based economies towards having innovation as a key driver, they need to master these lean innovation process. ♦



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The innovation economy

Creativity and innovation are considered the key drivers of economic prosperity. How can your business succeed in the innovation game? Detlef Reis previews his keynote speech and workshop.

Innovation and business creativity

In the past decade, humanity has entered a new economic age: the innovation economy. Creativity and innovation are now considered the key drivers of economic prosperity for companies, countries, and individuals alike.

This raises a series of interesting questions. How can we define creativity and innovation in simple terms? What factors drive and influence innovation and change nowadays? And how can we actually play and succeed in the innovation game?

These questions will be addressed in 'The creative class' and the related 'X-IDEA innovation mini-workshop'. We will look at the topics of innovation and business creativity through different frames: the grand picture, the big picture, and the small picture.

The grand picture of innovation: the environment

The modern business environment constitutes the stage on which the innovation play takes place. We will learn about the advent of the innovation economy, the drivers and the cycles of change, and why the world hates change. These environmental factors set the opening scene in the keynote talk before we scale one level down.

The big pictures of innovation: key concepts

Now, we are ready for a big picture view. First, we define creativity and innovation in simple terms. We also discuss the importance of making meaning to move from invention to innovation, look at the wide spectrum of modern innovation types, and touch on the financial premium that innovation leaders enjoy.

But why do only a few companies succeed in the innovation game? The top innovators know how to use the full spectrum of innovation types, how to distinguish innovations based on impact, and have found ways to deal with the dilemma of innovation management and its paradoxes.

The small pictures of innovation: applications

Appreciating the big picture of innovation first gives everyone a foundational knowledge platform which allows to scale down to the lowest level of abstraction. When we adopt a small picture view, innovation comes down to mastering four application areas: process, people, culture, and leadership:

- Leadership is the first small picture we will discuss. Just talking the innovation talk does not suffice. As Steve Jobs noted: "Innovation distinguishes between a leader and a follower." Companies that lead innovation in their industry not only have a creative leader at the top, but also creative people who creatively lead their teams on lower levels.
- Leaders influence the second small picture application that can make or break innovation: the organizational culture. How can organizations move from a copycat mentality to a creative culture? A good start is understanding which cultural factors empower creativity and innovation.
- The third small picture frame captures a critical dimension that closely relates to the first two: people. Who can best contribute to innovation, and how? Everyone can play a role, but depending on their preferred cognitive style, some people are better suited to create or lead innovation from the front, while others enjoy working on innovation at the back end of the process.



- The final small picture application is process, or in other words: how to better undertake an innovation project. We will briefly touch on how innovation processes and creativity tools work, and why they add value.

X-IDEA

In the subsequent workshop, we will get the chance to apply a systematic innovation method. X-IDEA is an awards-winning innovation method that can reliably help would-be-innovators produce standout ideas and outputs. Participants will form small innovation teams and take a practice case related to the pet industry through the five process stages of X-IDEA. First, delegates will learn how to correctly frame a pet innovation challenge.

Then, they will use a selection of creativity tools to generate raw ideas for their challenge. In the second creative stage, which is development, the teams will design some intriguing ideas into full-fledged idea concepts, which they will briefly evaluate in the evaluation-stage before pitching their top idea in the final action-stage. ♦



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Benelux

Ongoing premiumization may have helped the Belgian and Dutch pet markets in the last decade, but lacklustre performances in recent years are starting to have an impact. We zoom in on the facts and figures for these countries, and also shed light on the growing influence of European megacities.

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Belgium and the Netherlands, similar but different worlds

Ongoing premiumization arising from pet humanization may have helped the Belgian and Dutch pet food and pet care markets in the last decade, but lacklustre performances in recent years are starting to have an impact.

Different economies

The Belgian economy continues to grow at a sluggish pace, with real gross domestic product (GDP) expected to increase by 1.5% in 2017 (up from a 1.2% rise in 2016), whereas in the Netherlands, real GDP will grow by 2.0% in 2017 (down from a 2.2% increase in 2016). The Dutch economy has underperformed relative to its peers for several years, moving in and out of recession, and this, together with shifts in the pet population, has also taken its toll on pet care to a certain extent.

Mirroring human packaged food

Between 2012 and 2017, both the Belgian and Dutch pet care markets experienced slow growth, with Belgium faring better, rising at a 2% value compound

annual growth rate (CAGR). Overall, both markets are following the overarching themes of other Western European developed markets, with pet owners increasingly treating and pampering their pets, but looking after their health and wellbeing in different ways.

Pet food has also followed the wider trends of premiumization, with increasingly functional elements being added to pet food, in line with similar developments in human food. In fact, pet food has started to more closely mirror human packaged food, as the trend towards organic and all natural ingredients grows in importance. This trend mainly affects dry pet food, but is also having a positive impact on pet products such as cat litter.

Pet food has started to more closely mirror human packaged food.

Pet populations

The pet populations have been relatively stable in Belgium and the Netherlands, with both countries enjoying greater cat than dog popularity with 27% of households owning cats in Belgium, compared to 22% in the Netherlands.

In terms of dogs, 19% in the Netherlands versus 24% in Belgium. Growth trends differ slightly: In Belgium, the pet population is expected to grow over the next five years, albeit at a slow rate, in the Netherlands, it is expected to decline over the same year.

And while this can pose certain short-term challenges, manufacturers will be able to take action to maintain value in the industry.

Premiumization drives the market

Crucially, an increasing number of Belgian and Dutch pet owners consider their animals to be part of the family and are willing to extent the same level of care and prevention as for themselves.

This means that not many consumers are willing to compromise on lower-quality pet food products and they remain focused on demanding value-added products, particularly those incorporating functional attributes. Value sales of premium dog and cat food therefore significantly outperformed the wider market in Belgium over the review period, enjoying a real value rise of 27% over 2012-2017, compared to 12% in the Netherlands.

Natural trend spills over into pet products

As pet owners increasingly spend time with their pets in smaller environments such as flats, they are also becoming more interested in their health.

Pet products have therefore fared well, with natural options often being sought. Natural cat litter was preferred over less green options, but developments in pet healthcare have also been popular.

This has particularly been true in Belgium, where a previous change in legislation had changed the rules regarding selling pet healthcare products. In 2016, many manufacturers launched pet healthcare products with natural ingredients only, which proved quite successful. At the same time, pet supplements also experienced good growth as owners became more aware of the relevance of vitamins and supplements. As BARF feeding becomes more popular, enhancing it with supplements is often recommended and has helped to develop the category.

Future prospects

Euromonitor International forecasts that Belgium will post higher value growth than the Netherlands.

Cat treats will remain the star category as urbanisation progresses and more consumers choose to adopt cats. In fact, it will be the fastest growing category in Belgium, even in terms of absolute value growth.

Premium cat food will follow suit, showing the length to which Belgian cat owners are willing to go to look after their furry friends. It will also be the fastest growing category in the Netherlands in absolute value terms. ♦

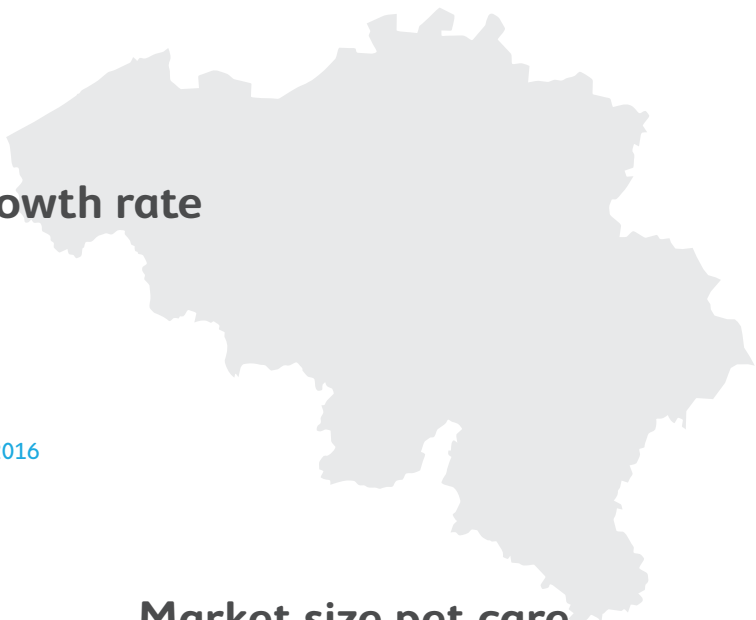
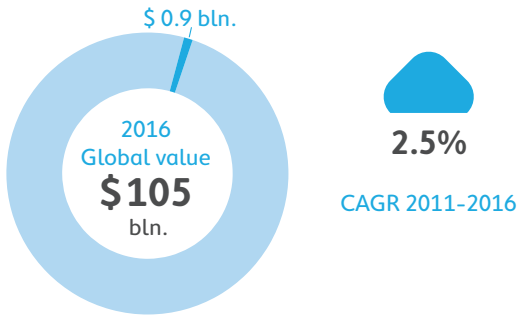


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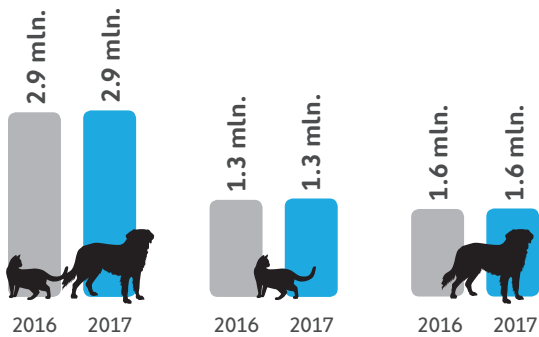
Belgium

Industry value and growth rate



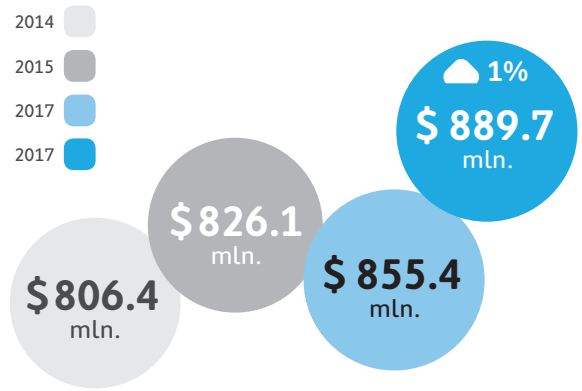
Pet ownership

Proportion households with cat or dog

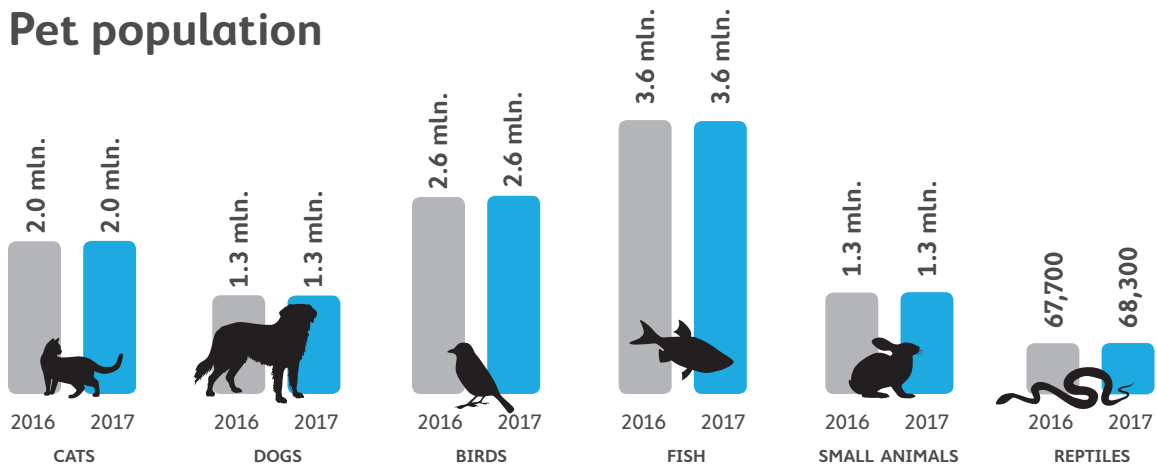


Market size pet care

Retail value RSP | Fixed 2017 exchange rates

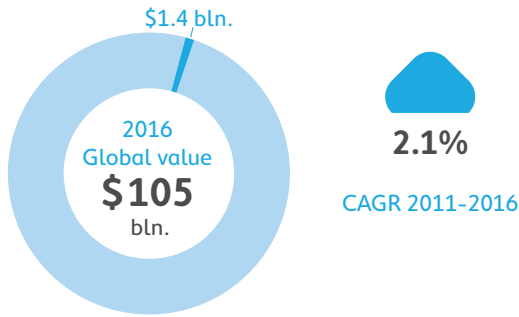


Pet population



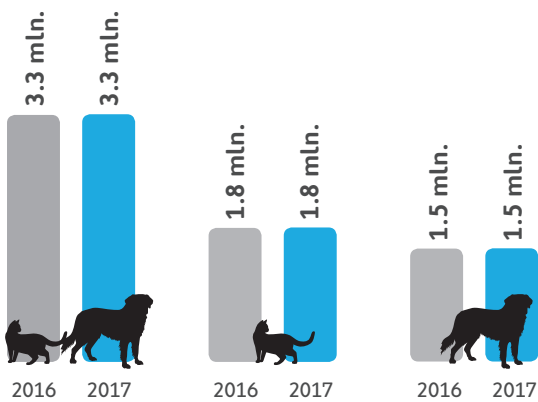
Netherlands

Industry value and growth rate



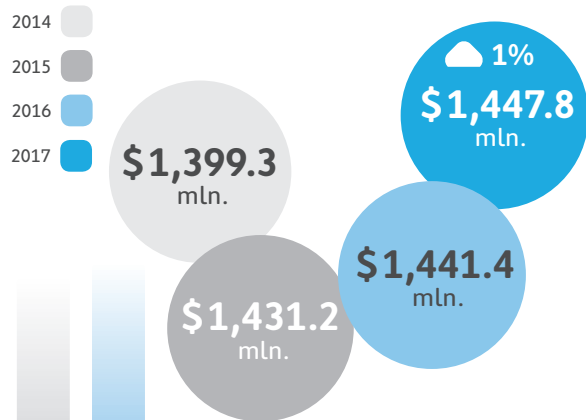
Pet ownership

Proportion households with cat or dog

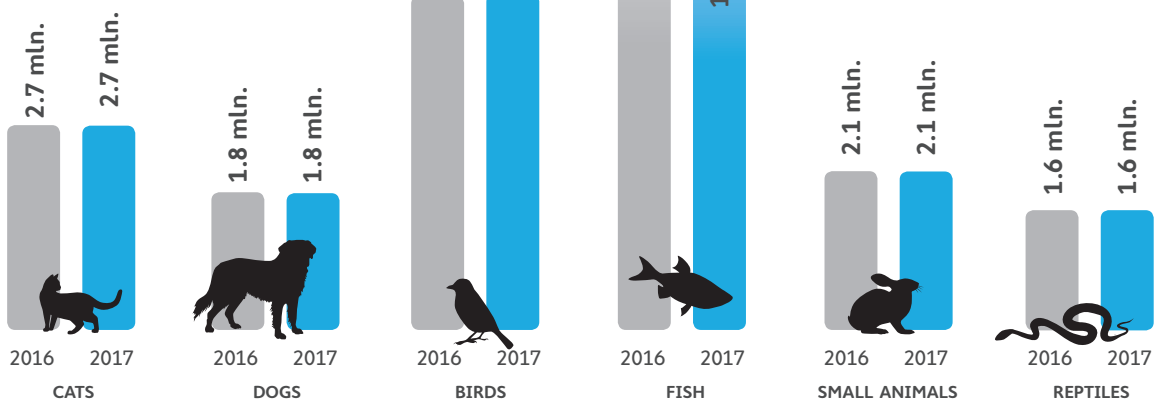


Market size pet care

Retail value RSP | Fixed 2017 exchange rates



Pet population



source: Euromonitor International



European megacities

As urbanization intensifies, the concept of a network of megacities in Europe becomes increasingly realistic.

Global phenomenon

More than half the world's population lives in cities. According to the United Nations, approximately two thirds of the world's population will be living in an urban area by 2050. These staggering numbers illustrate the massive urbanization of society. Even though trends differ across regions and development levels, virtually all countries across the world are becoming increasingly urbanized.

With this development comes the logical growth of cities. In densely populated areas, neighbouring cities fuse together and one-time suburbs become part of the metropolis. The United Nations defines megacities as urban or metropolitan areas with at least 10 million inhabitants – and on an even larger scale, gigacities count more than 100 million

inhabitants. None of those exist today, but the Chinese government is reportedly planning to connect multiple cities in various regions, resulting in several of these gigacities. The Greater Shanghai region would then possibly be home to more than 170 million inhabitants by 2020.

European megacities

In Europe, too, urbanization is a discernible trend. As early as the 1960s, architect Yona Friedman predicted “the development of a dense urban belt stretching from the City of Oxford in South East England to the Rhine–Ruhr region of Germany”.

In recent years, a POLYNET study researched “sustainable management of European polycentric mega-city regions”. The project discerns eight

megacity regions in northwest Europe: southeast England, the Paris region, central Belgium, the Dutch Randstad, Rhine-Main, Rhine-Ruhr, northern Switzerland and greater Dublin.

Architect and designer Edwin Heathcote explains: "Ironically, the suburban growth of the cities in this belt, which has coincided with the decline of heavy industry, infrastructural developments and city-scale airport hubs, may be making Friedman's vision a reality." Additionally, there are also plans for a Hamburg-Copenhagen megacity.

Central Belgium and the Randstad

Focussing on central Belgium (the Brussels area) and the Dutch Randstad (a crescent of cities in the west of the Netherlands), both regions have a combined number of inhabitants of 15.1 million. Globally, they are considered key centres of influence, for several reasons.

From a political point of view, Brussels is the *de facto* capital of the European Union, a major centre for international politics, and home to many international organizations. The Hague, though not the capital of The Netherlands, is the seat of the Dutch government, and is home to the International Court of Justice and the International Criminal Court.

Economically speaking, the region plays a major role in international trade, with the ports of Rotterdam and Antwerp being the largest and second largest in Europe. The Randstad is also the favourite place for multinationals to locate their European headquarters. Amsterdam is considered one of the top financial centres in the world, aside from being the commercial hub of the Randstad. The Globalization and World Cities Research Network (GaWC) considers both Amsterdam and Brussels 'Alpha' cities: cities "that link major economic regions into the world economy".

Challenges and opportunities

Megacities come with new challenges, among which are environmental damage, inequality, governance issues, overcrowding, crime, and shortages in power, food, water and clean air. Solutions will have to be found for these issues.

However, new opportunities are also on the horizon. In its 'Urban Europe' report, Eurostat mentions 'green cities' as an opportunity in an increasingly urbanized society. Eurostat: "Although the ongoing process of urbanisation has created some of the biggest challenges facing the planet, it also provides potential, insofar as cities are creative hubs and may provide possible solutions to a range of environmental issues."

Connectivity

Eurostat also describes the rise of so-called 'smart cities', "where traditional networks and services are made more efficient [...] for the benefit of its inhabitants and businesses". Edwin Heathcote explains that in order to function, the megacity "will need connectivity. Digital networking has not, as was forecast, led to a decline in the city. Rather, it has led to an urbanisation of the rest of the planet."

With the continuing urbanization of society, Europe's megacities are expected to become even more strongly interlinked, both within their own metropolitan areas and with each other. ♦



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The value of co-products

With a clear vision of how to conduct sustainable business, Duynie Ingredients places itself at the forefront of innovative and efficient pet food ingredient suppliers. Their approach involves a keen eye on the value of resources as part of a circular supply chain. PETS International discusses the pet food market's need for a long-term sustainable business concept.

Co-products with guaranteed quality

Duynie Ingredients is the most recent addition to Duynie Group, which is part of the cooperative agro-industrial group Royal Cosun. This unique position allows the company to work with a

transparent supply chain but at the same time, creates the opportunity to closely monitor quality control. The company's vision for the future is crystal clear: "We must try to achieve the maximum value out of raw materials as resources become scarcer."

The materials to be reprocessed are co-products originating from within the cooperation's product chain itself, as well as raw materials from carefully selected suppliers. "What we do is help food producers who despatch any leftover materials after having completed their



Benelux

“People want to see what is in their food and their pets’ food.”

The circular approach is not limited to reusing edible material. For instance, one of the drying locations is not based on natural gas but on waste heat from a fermentation process. This particular process generates a lot of heat. This heat can be used to dry co-products in a very sustainable way.

Knowledge partner

Karina stresses that being able to deliver consistent quality to the pet food industry is an important part of Duynie’s business. However, it goes hand in hand with investing in partnerships. “If, for whatever reason, we cannot meet the demands of a potential customer, we are motivated to see how a possible partnership can in fact be established. We ask ourselves: how can we help your company to advance in the pet food market?”

“We envision a steady and sustainable business where we act as supplier, knowledge partner for nutritional advice, innovator and provider of business solutions.”

Innovative progress

In order to continue to act as an innovative partner, Duynie’s parent company Royal Cosun looks forward to opening a new R&D facility in the Netherlands later in 2017. This will allow Duynie to expand their role as advisors.

Another investment is the plan to open a new drying facility, involving different kinds of dryers so that flexibility can be offered at all times.

Duynie uses residual heat that can no longer be used in its business process. “In this location, we will dedicate the plant’s capacity for producing ingredients for the pet food industry,” Karina continues to elaborate enthusiastically.

The natural product range currently includes dry products such as potato, chicory, sugar beet, fruit and vegetable. It is expected that the current humanization trend will continue to strongly influence the demand for natural pet food ingredients and Duynie already anticipates this ongoing trend.

“We see a sharp rise in healthy ingredients for pets – inulin, chicory products and beet pulp, for instance. But another trend is the recognisability of specific ingredients. People want to see what is in their food and their pets’ food. We look forward to researching how we can integrate these trends into our products and services.”

In this way, Duynie Ingredients acts as the innovation guardian for the entire supply chain and serves suppliers, customers, and the green economy. ♦

♦ **Duynie Ingredients**
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own production process. These materials can be reprocessed, and therefore revalued, and then receive a new purpose,” explains sales manager Karina Marsilje. “In this way, we reintroduce it as an important sustainable source for pet food. We can establish a circular supply chain and offer an important service for our partners.”



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From dream to reality

In 2010, John Sars started his business in an attic room importing and distributing high-quality food products for dogs and cats. Seven years later, the business has grown to become one of the fastest-growing companies in The Netherlands. For this, Johnson Petfoods has twice been crowned with a Gazelle Award.

Johnson Petfoods made a flying start with the distribution of Profine, food for dogs and cats. This was later joined by Planet Pet, Sam's Field and their own brand Riverwood. "All our products are unadulterated, traditionally made with passion," says John Sars. "They contain lots of meat, and we offer food which is not bulked up with grain."

Best available ingredients

Johnson Petfoods put Riverwood on the market last year. "People are now very conscious about what they eat, and, consequently, what their children and pets eat," Sars explains. "...and

that was the reason why we developed Riverwood."

Each Riverwood product is based on three different sorts of high quality free-run or free-range meat. In addition to the very best ingredients, Riverwood also contains herbs that have medicinal or supportive properties. "For example, take marigold – this has an anti-inflammatory effect," John continues. "It also helps wounds to heal, strengthens the immune system and assists digestion."

Making a difference

Johnson Petfoods feel it is their obligation towards their customers to keep a constant focus on product development and innovation. The pet food market is changing rapidly and pet specialist stores have a great need for quality products with which they can distinguish themselves. This is why they develop products that provide them with the tools to make the difference, and to fulfil their role as specialists.

Proud

Riverwood was successfully launched on the Dutch market in February 2017, and internationally in May 2017 at the Zoomark exhibition in Bologna. These launches resulted in an incredible number of enquiries from 32 different countries.

Johnson Petfoods is tremendously proud of Riverwood. "Our results up till now confirm that we are definitely on the right track, both nationally and internationally." So it is hardly surprising that John Sars sees a rosy future ahead: "We haven't finished growing yet. The sky's the limit! We are extremely ambitious. We have lots of plans and ideas in the pipeline for new products. Our aim is to develop Riverwood into a complete line of ultra-premium products for dogs and cats." ♦

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Beeztees THE NETHERLANDS

We can only embark on this new venture because we believe in our people.

Beeztees positively surprised the pet industry by acquiring Karlie in May 2017. Owners Guusje and Job van Riel (brother and sister) explain their ambitious move and their vision on how they approach this opportunity to add new value to the German-speaking market.

Team effort

Job and Guusje felt that they were ready to take their business to a new level. "We were already keeping our eyes open for opportunities and prepared the ground for seizing a business opportunity by strengthening our already highly qualified staff," Guusje explains.

"We felt that Beeztees had momentum, and Karlie was there at the right time."

The Beeztees owners took their time to get to know the people and the business at the Karlie headquarters, where they spoke with various staff members.

Understandably, the Karlie personnel were hesitant at first but the Van Riels felt that their plans were met with curiosity, especially because their approach was more informal compared to what Karlie had experienced in the recent past.

Job adds: "What we learned from our visits to Germany is that the Karlie team is resilient and very eager to restore the company's strength. Despite the fact that the team is smaller than before, there is still a lot of expertise.

Yes, times have been rough, but now the Karlie team can leave those turbulent times behind. We are committed to work and move forward together."



Benelux

Karlie continues as a separate, stand-alone business where the current management, led by Dominik Müser, will remain in place. Beeztees aims to bring the company's best practice, its innovative nature, to Karlie and add value to Karlie and the German-speaking market. "We must continue to trust our own strengths", says Job. "Karlie is still a highly valued brand and we can help to rebuild a strong player in the market."

Changes to come

In The Netherlands, Beeztees will continue to operate the way it currently does. However, some of its most innovative products will be added under the Beeztees label to the Karlie range, where Karlie will serve as distributor for these products. This gives the company the chance to bring innovation back to the home market very soon. Guusje: "We are aiming to launch over 500 SKU in November/December. All these products are bestsellers."

In addition to that, many newly designed products will also be launched under the Karlie label (expected Q1-Q2 of 2018). Job: "We are very serious about bringing back innovation to Karlie and we are not afraid to invest in that."

Job continues: "We believe in Beeztees' strength and in Karlie's strength and through this cooperation we can cover new ground without losing our identity. We want to do what we know and love best, and there is no need to enforce synergy."



Matching mindsets

"Acquiring a company and exploring business opportunities is not just about building a strong business case and being focussed on making fast money," says Guusje. "We thrive on adding value in a business process. We felt a connection with Karlie and the German way of doing business, which, like the Dutch corporate culture, is quite direct."

Karlie currently misses an innovative business drive, but it is exactly this drive which will help them regain their strength and market value. Beeztees is the perfect partner to bring this to the equation.

Future prospects

The vision is clear and Job and Guusje aim to continue improving the service level and to add innovation to Karlie's business. However, the most important thing is to build trust, and invest in relationships with customers and suppliers.

Guusje concludes: "We now need to prove that we are dedicated to putting our money where our mouth is. But, we are well on the way - the service level has improved a lot and new products are coming in soon!" ♦

- ♦ **Beeztees**
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A black and white Sheltie dog is running on a sandy beach. The dog has a white blaze on its face and white markings on its chest and paws. The background is a clear blue sky and a blurred beach.

Scholtus Special Products
THE NETHERLANDS

A high-quality innovator with long experience in treats for dogs and cats

A continuous drive for innovation is essential in order to develop winning concepts. For Scholtus, innovation is key.

Philosophy

By developing their category management and offering concepts rather than 'just products' they try to support their customers the best way possible. Fully focusing on treats for dogs and cats, doing their own research at universities, looking beyond borders, listening to all the customers and consumers around them – all this enables them to continue playing a leading role in our market.

DNA built on experience and quality

Scholtus was one of the first European producers of semi-moist snacks for dogs and cats. In the 1980s, production consisted of natural treats for dogs, which changed over time into private label production of extruded multi-colored snacks in the 1990s. Over the last three years, the capacity for the extruded snacks has been doubled.

They were the first to launch grain-free treats, clean-label snacks, single-protein treats, superfood snacks and many other developments.

Certified quality systems are part of the DNA of Scholtus. In 2004, Scholtus production was IFS certified followed by a BRC license in 2008. They have maintained both certificates ever since.

Benelux

portfolio changed due to the rise of consumer awareness, e-commerce and discounter chains, and as a result the shelf plans changed as well.

Premium products became really exclusive high-quality and budget products are more well-known price items with a value-for-money positioning. Scholtus' portfolio offers products, fancy labels and concepts for every inch of shelf and they use their knowledge of the market to develop a category in collaboration with their customers.

The partner in business

Over the years, Scholtus has developed not only as a producer and supplier of treats, but also as a partner to develop the category. Scholtus feels that delivering the right product is not only a license to exist, but builds the concept that supports the pet-owners needs and ultimately results in better sales for the customer per meter of shelf space.

Experienced team

Nine professionals in sales & marketing are based in different regions in Europe with local market knowledge and an international overview. Coupled with the Operations Team in The Netherlands they build the business and liaise with customers in a professional way.

European focus and worldwide knowledge

Scholtus' private label and branded sales are mostly focused on Europe, although Scholtus has an export license for the

United States of America. Europe is still a growing market, especially when it comes to snacks and treats. Overall, Scholtus is present in most of Europe but is always looking forward to new Boxby partners, especially in Italy and France.

In 2011 Scholtus acquired Proline Petfood and the Boxby brand. Over the years, Boxby has become the premium brand with a wide portfolio of healthy dog treats for the pet specialty channel in 23 countries throughout Europe. In addition, the company focuses on manufacturing and sourcing private label products for retailers in Europe and the US.

Snack and treat future

E-commerce and several other trends are putting pressure on the current structures in the pet market. For Scholtus it is important to continue to innovate at product-, market- and customer levels. Its mission is to stay a leader in snacks and treats for cats and dogs.

Delivering high quality nutritious solutions and added value to their customers by developing and supplying innovative products and concepts that support the best performance of the business. This will remain their mission, together with creating stability and growth in the dog and cat treat category. ♦

- ♦ **Scholtus Special Products B.V.**
Bertus Kwakernaak
b.kwakernaak@ssp-proline.com
scholtus.com

Development and innovation

With their experience in the snacks and treats category for over twenty years, Scholtus has re-invented itself over and over again to become the leading player when it comes to snacks and treats for dogs and cats. Over the last few years Scholtus has experienced a shift in the way a category is built. It used to be a shelf full of similar articles, with the only difference being packaging. The product

Laroy Group BELGIUM

International family business at heart

The Belgian Laroy Group, formerly known as Laroy Duvo, quickly grew from a medium-sized family business into a company with a firm position in the European market.

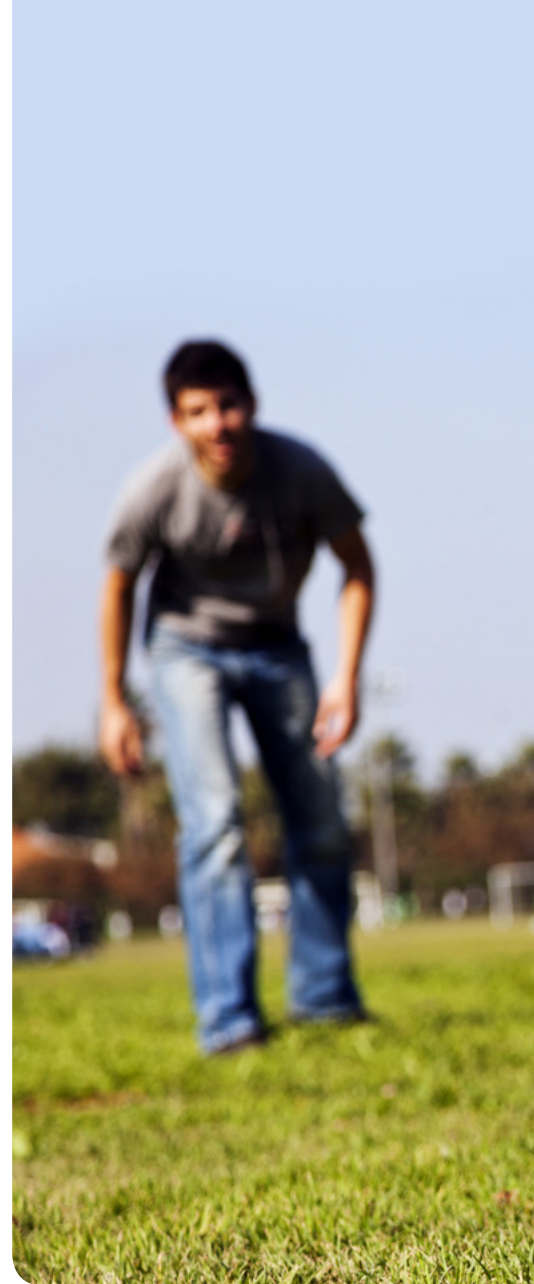
A shift in focus

Recent acquisitions changed the company dynamics, which required a fresh approach and new insights. PETS International met with Laroy's management to discuss family values and their vision for the future.

Ever since the company's first acquisition, Dutch bird food manufacturer Cédé in 1986, Laroy acknowledged the need

to stand out and differentiate. With the recent acquisition of Flamingo, the company concludes a hectic but exhilarating time, at least for now.

"Pets receive much more respect compared to a few decades ago: they have become a valued member of the family," says CEO Els Laroy. "It is our task to make sure that this change is reflected in the way we do international business."



Starting in 2008, Laroy changed their direction and decided to focus more on non-food products.

"Our future lies in strengthening our private brands and improving our assortment and we will continue to do so," says Guy Toremans, COO at Laroy Group and CEO at Flamingo. "After the decision to focus on non-food, we first needed to establish our core product range so that we could work on finding distributors for sales outside the Benelux. Slowly but steadily, this strategy will also enable us to expand our product development with our private brands."



House of Brands

Acquiring EBI enabled Laroy to expand their product range with more creative and innovative products. In fact, it was the kick-start for the House of Brands concept. Last year, there was the option to acquire Flamingo.

This appeared to be a unique chance to acquire market share and expertise. Peter Moyaert, CFO, explains further: "If we had not acquired Flamingo, we would have had a strong competitor, but now we have gained a partner which allows us to join business forces and confirm our international position."

However, Flamingo will continue to operate as a full stand-alone company. "Of course, we will exchange our knowledge and expertise in building up strong relations with all stakeholders. With regard to our sourcing in China, we already noticed that our suppliers now consider us, even more, as a very interesting business partner for the future."

One-stop shop for b-to-b

The labels included in the House of Brands give Laroy a unique position in the market. The company entails b-to-b where it is a strong player in building long-term relationships with partners, serving

as a one-stop shop. Also, Laroy wants to communicate about their brands to customers and consumers. Toremans adds: "We will also continue to collaborate with shop owners to ensure that customers will continue to visit their stores."

A bright future

In the coming years, Laroy intends to focus on product development and the visibility of the labels that are covered by the House of Brands. Els Laroy shares her view: "Our role is also to help store owners to draw customers to their stores, as well as to offer tools to develop store concepts. Our role is also that of a retail advisor, even at the level of store design and details such as colour coordination."

Laroy Group looks at the future positively. But one step at the time, and with thorough preparation. After a hectic period, it is now time for controlled international growth. "We have successfully 'hunted' in the last four years, and we should now focus on optimization – for instance, in reviewing the distribution channels. We look forward to protecting our key values and aspire to innovation, but our eye must always be on our core business."

Pater familias Carlos Laroy sums up the heart of the business: "A satisfied customer is the gateway to the future. The only way to build and expand your company is to ensure that you sell products that you yourself truly believe in." ♦

♦ **Laroy Group**
info@laroygroup.com
laroygroup.com

Farm Food THE NETHERLANDS

Completely natural dog food and chews

Farm Food is a Dutch family-owned company that manufactures and sells natural products for dogs. The brand was established in 1982. Today, Farm Food products are sold all over Europe.

Products

The company made its name with Farm Food HE, a completely natural cold-pressed dog food. Other key products are Farm Food Fresh, Rawhide, Trainers, Antlers and the number one, milk based on goat milk for puppies and other small mammals.

Production

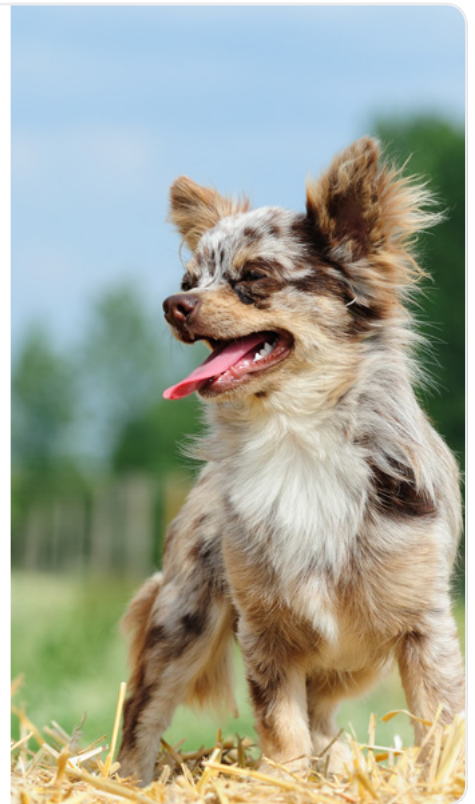
Over the past few years, Farm Food has reached annual production totals of over 3,000 tons of cold-pressed dog food and more than 600 tons of fresh frozen dog food, showing annual growth rates of more than

15%. The unique commitment to natural ingredients is also reflected in Farm Food's rawhide products, which are produced in Europe, and the Antlers snacks, made from naturally shed antlers collected from nature.

In July, Farm Food launched a new product: Fresh Menu, a 100% natural, gentle-steamed complete meat meal in a pouch.

Farm Food B.V.

info@farmfood.com
farmfood.com



Beeztees THE NETHERLANDS

Create happy moments!

Beeztees is a supplier of fun and functional accessories for your pets. For more than 45 years, good service and reliable deliveries have been our basis. The valuable services make Beeztees a fun and easy partner to work with.

Brands

Beeztees wants to make the life of pets and their owners as fun as possible. It is specialized in everything you can imagine for your pet. Always nice looking and with a touch of fun. Designed by Lotte has a lifestyle collection for cats, dogs, and pet owners. These products are created to fit your lifestyle and interior.

Services

- Unique, innovative products
- Category management support
- Shop fitting advice (2d/3d)
- Image/video database
- Automated data and content exchange
- Easy online ordering portal
- Dropshipment

Location

- Head quarter: Beeztees, Waalwijk, NL
- Sister company: Karlie GmbH, Bad Wünnenberg, Germany
- Sales office: Beijing Beeztees Pet Products Co., Ltd., Beijing, China

Facts

Number of employees: 105
Warehouse capacity: 15,000 sqm
Home markets: The Netherlands, Belgium, Germany (export to 45 countries)

Beeztees

info@beeztees.com
beeztees.com
designedbylotte.com

Boxby

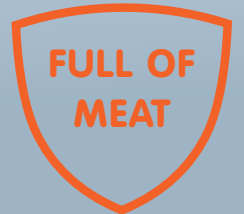
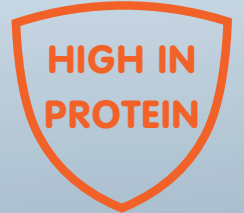


Lex&Max® THE NETHERLANDS

Wooden dog food and water bowls stand feeder

The Lex&Max assortment has expanded with a beautiful wooden stand feeder with an industrial look, and two stainless steel bowls. This piece of furniture is a real eye-catcher in every home and fits perfectly with the famous wooden Lex&Max settees. Lex&Max for royal pets!

Maro Pets. Co. B.V.
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THE NETHERLANDS

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PR-Pet B.V.
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petrebels.com

Kinlys Group BELGIUM

Manufacturer of specialized pet products since 1932

Kinlys Group, formerly BENELUX NV, has been a trusted name in the pet sector since 1932.

Modern and trendsetting

Their love of pets, market-specific experience and unceasing dedication have enabled them to become a major player, both nationally and internationally. Thanks to their unique business vision, Kinlys Group have evolved into a modern, trendsetting company, with distribution in over 65 countries.

Brands

Benelux – Belgian top-quality mixtures and snacks for rodents and birds.

Benelux Nature – Carefully selected food, snacks and accessories to take care of wild birds.

Primus – Premium food for birds and small animals.

Aqua-Ki – High quality food and maintenance products for pond and aquarium fish.

Services

The combination of manufacturer and distributor makes Kinlys Group a one-stop specialist for pet care businesses across the globe. Flexibility in production results in quick deliveries, on-demand products, including private labels, and high standards for quality.

Locations

Headquarters: Wielsbeke, Belgium

Kinlys Group

info@kinlys.com
kinlys.com



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Selo THE NETHERLANDS

Dutch processing lines at their best

Selo has over seventy years of experience in meat processing and pet food preparation, and is the world leader in turn-key solutions of wet pet food systems based on steam tunnel technology.

Shift towards wet pet food

There is an ongoing shift in consumer demand toward higher-quality, nutritious foods for their pets. With this consumer interest comes a global movement from dry towards (premium) wet pet food. Wet pet food has numerous advantages, as these are often high-end products with higher added value. They provide more hydration, a higher protein level, and are easier to chew, offering a whole range of benefits.

Production line

For the preparation of pet food, breakers, mixers, emulsifiers and an extruder are lined up in front of the steam tunnel, in which the emulsion is cooked with condensing steam, ensuring an energy-efficient and homogenous cooking process. A cutting unit cuts the ropes of processed meat into pre-determined (variable) lengths.



The chunks and the gravy, prepared in an in-line gravy unit, are mixed into a specific mixture. This is done either by a one-shot fill or a two-shot fill system. The chunks are dosed by a multi-head weigher and the gravy by a volumetric dosing system. The filling can be done in trays, cans or pouches.

Stand-up pouches offer clear advantages as they use less packaging material, resulting in reduced transportation and warehousing costs because of less packaging volume and weight. Additionally, they allow for an effective and attractive product presentation; a healthy/tasty looking packaging is popular.

Solution

Selo offers an A to Z solution: their projects are executed by their team from the design phase up to the installation and

configuration of the systems. They fully master and take care of all technological, automation, engineering, assembly, installation and after-sales disciplines.

The company has six branches and is primarily active in Europe. The head office is located in Oldenzaal, The Netherlands. Selo's branches have an efficient exchange of data and know-how, thus ensuring their clients can benefit from the latest knowledge and applications in the field of processing and packaging systems.

Selo constantly aims to provide a package of goods and services that meets the needs of their customers. The focus is on providing a high level of added value to your packaging or process system. ♦

♦ Selo
info@selo.com
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M-Pets BELGIUM

Excelling in choice and service

M-Pets is a company specialising in the distribution of innovative and exclusive products for pets.

Full service provider

M-Pets was established in 2015, evolving from an international working group of experts from various countries. Their product range (over 1,500 SKU's) covers an extended assortment of pet accessories and snacks for dogs and cats and small animals. Their team is dedicated to meeting their partners' highest expectations in terms of product choice and service.

Product design

Constantly investing in product development and design, the functionalities of the products are the key drivers. The needs of the pets and their owner come first and are given serious consideration during the design process. How do pets live together with their

owners? What and how do they eat? How (much) do they play? Do they mainly live indoors or outdoors?

Special attention is also given to attractive packaging with clear communication about the USP of the product in order to stand out on the shelf and catch the customer's eye.

Global distribution

M-Pets works across countries and continents with a large warehouse in China, where full consolidation is provided. Thanks to this modern warehouse, the brand can provide fast shipping and deliveries with maximum flexibility in terms of product selection. On-demand products and ranges can be provided as well.

M-Pets products are distributed by exclusive partners. To support this partnership, the company works very closely with its distributors to create consumer demand and increase sales.

In 2017 M-Pets will be presented with its stand at CIPS (Shanghai, China) in November. Then in 2018, in February at ANIDO (Belgium), in March at Global Pet Expo (Orlando, US), in May at Interzoo (Germany), in August at PETSA (Brazil) and then in November at CIPS (Guangzhou, China). ♦

♦ **M-Pets**
sales@mpets.eu
mpets.eu



Zoo&Zo THE NETHERLANDS

Zoo&Zo's retail hospitality

With a sharp eye for service, quality and customer care, Zoo&Zo – the largest specialist pet store in The Netherlands, presents itself as an innovative player on the market. CEO Arnold Vlastuin has clear ideas about the store concept: “The customer is our guest.” PETS International visited the store in Ede and asked Vlastuin about his creative entrepreneurship.

Store design and product range

Zoo&Zo gives its guest a warm welcome. The customer walks into a spacious, well-lit store. On the right, we find the canine section, with various displays of baskets and blankets in a style reminiscent of lifestyle magazines. On the left, we see the in-store vet and the feline range of products.

In addition to a lunchroom, a fish section and a horseriding section, the second floor

also has a separate angling department with attractive product displays for outdoor leather boots and high-quality rainwear. The maintenance-friendly design with its warm, kind but nonetheless luxurious atmosphere gives the business its unique signature.

With its careful choice of product range too, Zoo&Zo has secured a good position on the market.

The range, particularly of dog food products, is impressive. “We are the exclusive distributors for the Benelux of the Genesis and Chicopee brands (Harrison Pet Products Inc.), and that is a good way for us to position our firm,” Vlastuin says. “I want to be able to continue providing the customer with quality and service – and you can see the value we attach to quality in the products we have on our shelves.”



Benelux

Connecting offline and online

The store concept has gone as far as it can now, so with a well-run store and well-trained staff it is time to continue building the online community.

A thoroughbred entrepreneur

Arnold Vlastuin has entrepreneurship in his blood. In 1992, he purchased the local specialist pet store, Guppy. He understood and felt what was going on with customers and dared to invest in a range of better quality pet foods. The business was able to expand with his insight and vision, among other things with a new store dedicated to angling. Zoo&Zo opened its doors in 2016, thanks to Vlastuin's clear vision: an accessible and attractive store where a customer could enjoy an optimum store experience.



"We have to make sure that a customer understands what he or she is buying online – and to do that you need more than a plain old product description – testimonials would be a good idea here.

We will be launching a campaign with an online expert in tow. He will become the new face of the store."

Community building and customer experience

What does Vlastuin see as the biggest challenge for his business? "One important factor is that the prices in the web shop must be the same as those in the store," Vlastuin explains. "Competition among web shops is fierce and our store can be an added value. That is only possible if the prices do not differ.

"We try to trigger customers on online platforms to visit the store – by announcing special events, such as a cat show. We make video clips of these events, which can also be uploaded to the social media channels."

Zoo&Zo has a broad approach to the notion of customer loyalty. The store functions as a way of bringing customers together and even acts as a community centre where, for instance, carp-fishing fans can enjoy a coffee together during the carp season. Organized walking tours allow dog-lovers to meet each other and at the end of their walk, they receive a bag of goodies, filled with suppliers' samples.

Vlastuin emphasizes that the next generation of guests are also important. In addition to children's parties, the firm also provides educational instruction for children. "This way, we can really bring people together."

How successful is the store formula? In time, Vlastuin sees opportunities for expansion, but at the moment he is focussing on investing in collaborating with suppliers and strengthening the online position: "Just as we do here in the store, I want to be able to extend a heartfelt welcome to every customer online." ♦

♦ **Zoo&Zo**
 info@zoo-enzo.nl
 zoo-enzo.nl



Tom&Co BELGIUM

Ready to take the next omnichannel step

Hidden between large Delhaize warehouses, the Tom&Co team is preparing the move to a new headquarters. Having a new ambitious management, investors in the company themselves, will allow Tom&Co to focus on strengthening their corporate identity and international position. PETS International asked CEO Lionel Desclée how he expects to tackle the challenges the company currently faces and what the main focus for retail business is.

“It is important for national brand suppliers to be present in stores, as stores offer them a unique medium to connect directly with customers.”

Omnichannel

Tom&Co invests in developing both their online and offline presence. As CEO Lionel Desclée explains: “The presence of a well-organized store network can be supported by a well-developed online concept. In fact, an online retail design can support the brick-and-mortar business, especially when the stores’ network is optimal. Therefore, we are reassessing store locations and optimizing the network.”

Lionel states that customer needs should always be monitored carefully. A concept that may work for customers in France may not be that appealing to the Belgian clientele. “Businesses should have the flexibility to adapt to changing customer needs.”

Store concept

An omnichannel approach requires an innovative store concept, as online-only retailers are proving to be strong competitors.

“We regard our stores as a valuable and specific medium where we can present products and services in a way which makes a visit to the store an emotional experience. Excellent service, guaranteed quality and well-trained staff are essential,” says Lionel.

“Relying on store presentation and the attraction of in-store events are important, but we should not forget the

strength of promotions and bargains.”

In addition, a store can also have a clear link with a company’s online business. For instance, customers may use the website as a tool to prepare their store visit, or order online but receive a discount when the order is picked up in their local store.

Branding and private label

Another observation that Lionel shares is that brands, more and more, are tending to become commodities and when it comes to selling and marketing brands: only the price matters. Therefore, Tom&Co needs to compete with national brands. How does this affect the company’s strategy?

“There is definitely a place for national brands in our stores, but the share of private labels increases in the less innovative categories. It is important for national brand suppliers to be present in stores, as stores offer them a unique medium to connect directly with customers.

“Our goal is therefore not to replace national brands, but to serve the market and always offer products that are also competitive to the online-only retailers. National brands are selected based on their uniqueness, the added value they offer to customers and the support they grant in the development of our network.

One of the ways that Tom&Co strengthens their core business is by having a clear vision on their cooperation with their suppliers. “We seek partnerships which will generate value-creation in the long term, and expect our partners to contribute to the company’s commercial strategy. Our role as retailers is to make the best selection for our customers.”

“Customer loyalty is increasingly volatile both for retailers and brands. A well-thought and 360° approach is therefore necessary capture the full potential of a presence in stores.”

Looking to the future

Lionel sees a clear and bright future for Tom&Co. “In the end, it is our goal to make both people and pets happier. Animals have a real impact on the physical and mental health of human beings. I feel that we underestimate the value of having a pet in your home and how an animal can add to the quality of life. The pet retail business must take these emotions, and the omnichannel customer journey that comes with it, into account.” ♦

Lionel Desclée will be part of the retail panel at GlobalPETS Forum in Venice, 24-26 January 2018.

♦ **Tom&Co**
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Advertorials

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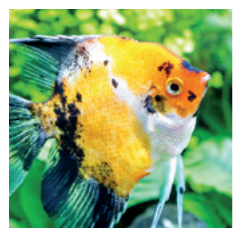
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Model	Colour	Dimensions	Litres	Flow Rate	LED Lighting	Filtration
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LifeStyle 29	Gloss Black OR Gloss White	38 x 37 x 25cm H	29L	360L/hr	9W	1 x Carbon Cartridge + 1 x Sponge Pad
LifeStyle 52	Gloss Black OR Gloss White	51 x 43 x 30 cm H	52L	450L/hr	14W	2 x Carbon Cartridge + 2 x Sponge Pad
LifeStyle 76	Gloss Black OR Gloss White	60 x 45 x 33 cm H	76L	450L/hr	17W	2 x Carbon Cartridge + 2 x Sponge Pad
LifeStyle 127	Gloss Black OR Gloss White	80 x 51 x 38cm H	127L	1100L/hr	23W	3 x Carbon Cartridge + 3 x Sponge Pad

Aqua One China Co. Limited

For all enquiries please contact us at sales@aquaone.com.hk

Calendar of events



ParkZoo 2017

20 to 22 Sep, 2017

Sokolniki Exhibition Center, Moscow, Russia

parkzoo.ru



PATS Telford 2017

24 to 25 Sep, 2017

Telford International Centre, Telford,
United Kingdom

patshow.co.uk



GlobalPETS Forum Asia 2017

15 Nov, 2017

Shanghai, China

globalpetsforum.com



CIPS 2017

16 to 19 Nov, 2017

National Exhibition and Convention Center,
Shanghai, China

en.cipscom.com



GlobalPETS Forum Europe 2018

24 to 26 Jan, 2018

Hilton Molino Stucky Venice, Venice, Italy

globalpetsforum.com



Iberzoo 2018

15 to 17 Mar, 2018

Feira de Madrid, Madrid, Spain

ifema.es/propet_06



PATS Sandown 2017

20 to 21 Mar, 2018

Sandown Park Exhibition Centre Esher,
Sandown, Surrey, United Kingdom

patshow.co.uk



Global Pet Expo 2017

21 to 22 Mar, 2018

Orange County Convention Centre,
Orlando, FL, United States

globalpetexpo.org



Interzoo 2018

8 to 11 May, 2018

Exhibition Centre Nuremberg,
Nuremberg, Germany

interzoo.com

Contact us

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Upcoming issue | Advertising deadline: 15 September 2017 | Publication date: 13 October 2017

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Colophon

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Translations: Texx International Communications BV

Printing: Drukkerij Ten Brink, The Netherlands

Technical details

PETS International is perfect bound

page/trim size: 208 x 273mm, live area: 186 x 251mm

ISSN 1388-4638, frequency: 7 x per year, since 1988

Advertisement sizes (* apply 3mm bleed to each side of the advertisement)

spread: 416 x 273mm*

third page vertical:

full page: 208 x 273mm*

68 x 273mm*

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