



# PETS International

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## Sustainable business practices

Lessons learned from front runners  
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## Sustainable ingredients and production

Valuable insights into sustainability  
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## North America

Humanisation and premiumisation are  
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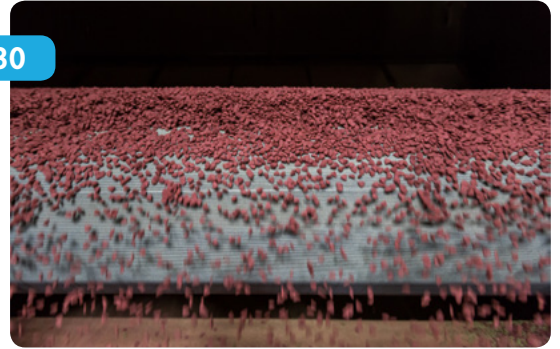
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# A new year, with changes plus many challenges!

First, our very best wishes for 2019. PETS International hopes it will be a happy and prosperous new year for you, both professionally and personally.

What does 2019 have in store for us? We are faced with the uncertainty of trade wars and the UK leaving the EU – or not. We expect a wave of mergers & acquisitions. And what will it mean for the international pet market as online platforms like Amazon and Alibaba become part of it? Above all, climate change can no longer be ignored, so sustainability remains firmly on the agenda.

This issue focuses on sustainability, highlighting several related topics. Should we be open-minded about alternative ingredients? Can the pet industry use an AB-level of ingredients instead of AA-quality human-grade ingredients? How can we reduce energy and waste, including excrement, and cut down the amount of plastic in landfills?

Perhaps you are an early adopter, already including sustainable ingredients in your pet food or using alternative material in your accessories.

How can you prove you are on the right track? What certificates are needed? And what are the requirements?

We can learn a lot from pet companies that have already made these changes. Three companies with a B Corp Seal share their experiences. What are the benefits and what can they teach us?

The Pet Sustainability Coalition (PSC) has a firm foothold in the US and is now coming to Europe. Their practical tools and guidelines can be of use to us all. How you tell the story to consumers is vital. So what does sustainability mean to your marketing approach?

2019 is also business as usual! This issue includes a section on the US and Canadian pet market: a taster for the upcoming Global Pet Expo.



Corine van Wjnden, CEO

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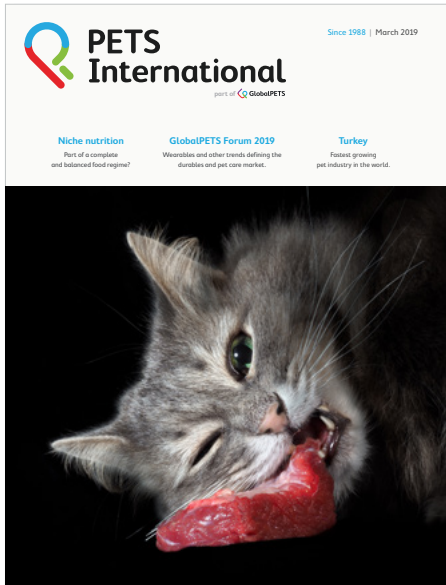
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Upcoming issue | Advertising deadline: 25 January 2019 | Publication date: 22 February 2019

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

## Pet industry highlights



### **PATS Sandown**

10 - 11 February 2019,  
Sandown Park, Esher, Surrey  
United Kingdom

[patshow.co.uk](http://patshow.co.uk)





### **Pets & Money**

28 February 2019,  
Millennium Gloucester Hotel, London  
United Kingdom

[petsandmoneysummit.eu.com](http://petsandmoneysummit.eu.com)



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### **Pets at Home appoints William Hewish as Chief Information Officer (CIO)**

The CIO position is a new role for Pets at Home and will help the company deliver on the strategic IT needs of the whole group well into the future. William Hewish will

report to Peter Pritchard, Pets at Home Group CEO, and will join the business in early 2019.



### **PIJAC hires director of communications and public affairs**

The Pet Industry Joint Advisory Council (PIJAC) has hired Gwyn Donohue as its new director of communications and public affairs. Donohue brings a professional background

of 25 years in communications, marketing and public relations for trade associations, animal healthcare, youth development and financial services organisations. With PIJAC, Donohue will develop and implement proactive communications strategies, programmes and messaging to strengthen the association's impact.



### **Petmate: first sales director for Europe, Asia and Australia**

Petmate announces a major change in its European Sales Structures with the appointment of Sabine Klaus as sales director for Europe, Asia and Australia.

Ms. Klaus has an outstanding track record in the pet business. She recently served at Petmatrix in the role of International Business Director. Before that, she was a Senior Buyer/Department Head at Fressnapf. She has been honoured with the 'Key Account of the Year' Award at Pets at Home in 2016.



## Pet industry highlights



### **Karlie: change of management**

Management at Karlie, part of the Beeztees Group, will change. After a successful reorganisation of the group of companies, CEO Dominik Müser has decided to leave Karlie. Job van Riel

(Beeztees) will take over his responsibilities at the end of January 2019. The changes in the management board are part of a long-planned follow-up procedure for Dominik Müser after completion of the restructuring process and integration of Karlie into the Beeztees Group. "I have finished my task, and now the Van Riel family is taking the helm to lead Karlie into the future," says Müser.

Meanwhile, Best Quality Pet Products Co., Ltd. has become part of a strategic alliance with a long-standing supplier. So Karlie was able to secure a supply of goods and innovative capacity for a large part of its range of products. "We are proud to have provided the proper support at the right time, due to Dominik Müser and his team. This enabled him to successfully complete his plan," Job van Riel explains. With the integration process of Karlie GmbH into the Beeztees group, Dominik Müser has completed his work as planned.



### **Versele-Laga acquires Higgins Premium Pet Foods (US)**

Versele-Laga has acquired The Higgins Group Corp., a companion bird and small animal food manufacturer located in Miami, Florida. The acquisition continues Versele-Laga's strategy as a worldwide manufacturer of branded quality pet foods and animal care products. Higgins provides a key cornerstone for Versele-Laga in the US, the largest pet food market in the world as well as the gateway to Caribbean and South American markets.

The synergies between Versele-Laga and Higgins are expected to enhance each company's capabilities, efficiencies and market reach. Higgins will provide Versele-Laga with valuable insights and a better understanding of pet parents' needs in the US.

### **GA Pet Food Partners (UK) reports strong organic growth**

Pet food manufacturer GA Pet Food Partners has reported an increase in turnover from £102 million (€113 / \$129 million) to £113 million (€126 / \$143 million), with a rise in operating profit of more than £300,000 (€334,000 /

\$380,000). The increase in sales has been achieved by organic growth with new and existing partners, generating sales through new product development, and achieving sales using highly generic recipes across many markets.



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# Zoomark International 2019: larger halls and a better schedule

**Work is already under way on the next edition of the pet industry trade show that is held once in two years in Europe. This year's event in May in Bologna is shaping up to be very promising indeed.**

## **New exhibiting space**

The 2017 edition of Zoomark International was extremely successful, with a 17% increase in exhibitors and a 25% increase in buyers. To continue to offer the highest level of service to pet industry manufacturers and professionals from Italy and the rest of the world, and to respond to the growing number of applications from companies globally, Zoomark International 2019 will feature new halls and extended exhibiting space. The event will now cover a surface area of more than 53,000 sqm, offering greater capacity and a more streamlined visitor experience. It will occupy not only hall 28 but also the brand new halls 29 and 30.

## **New show dates**

Responding to demand from both exhibitors and visitors, Zoomark International 2019 will run from Monday 6 May to Thursday 9 May. As it will no longer be held at the weekend, both Italian and international professionals will be able to organise their visits on days they prefer. At the same time, distributing visitor numbers more evenly over the four days will make it a better exhibition experience for all.

## **More business opportunities**

The biennial show is an established success on the industry calendar – with a steady increase in surface area and the numbers of exhibitors and visitors. Companies and buyers from outside the country have also increased in number, proof of the Italian event's great appeal as the pet industry's best and most important showcase. At the 2017 edition, Zoomark International welcomed 735 exhibitors (65% of them from 42 countries other than Italy) and over 27,000 professional visitors (30% from 100 countries outside Italy).

The 2019 event is expected to be even bigger, aiming to help exhibitors create and develop new business opportunities on the international market. In 2016, Zoomark International embarked on a comprehensive programme of activities abroad to promote the best of the Italian pet industry. As part of this, they organised Made in Italy halls at leading international trade shows, allowing delegations from Italian companies to present their products to the global market. ♦

**For further information: [zoomark.it](http://zoomark.it)**



# Sustainable food and pet supplies

Sustainability revolves around making proper, efficient use of our planet's resources including water and raw materials to meet increasing demands. As pet populations continue to grow, this section explores the challenges facing manufacturers of pet food and supplies and the changes they could make towards a more sustainable pet industry.

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# Bringing sustainability to Europe

**The Pet Sustainability Coalition is working with a growing number of pet companies in the European Union to implement custom sustainability strategies and drive long-term profitability.**

## **Tailormade recommendations**

90% of pet industry professionals report an increase in expectations for sustainable products and companies. Fortunately, the business benefits of environmental and social practices have been well documented by hundreds of peer-reviewed studies that illustrate benefits including cost savings, attraction and retention of top talent and much more. The Pet Sustainability Coalition (PSC), US, has been working with pet companies since 2013 to measure environmental and social performance and implement custom sustainability strategies to drive long-term profitability. PSC members receive tailormade recommendations as well as support

that simplifies the improvement process and ensures maximised return based on qualitative and quantitative analysis.

## **Tangible success**

PSC has already achieved credible success. For example, two member companies – Healthy Pet and WellPet – have both engaged in manufacturing improvements that reduce their costs as well as their energy and waste footprints. Meanwhile, Zuke's targeted packaging improvements have resulted in a lower carbon footprint and Earth Animal has focused on setting sourcing standards to foster animal welfare.

## Sustainable food and pet supplies



### Long-term growth requires retailer participation

Consumer data (particularly for millennials) shows an increase in people's willingness to pay for sustainable products and a higher expectation for businesses to address environmental and societal issues.

It appears that not all pet retailers are eager to meet this consumer expectation, however, since many seem slow to adopt sustainable business practices. 2018 data shows that 50% of pet retailers do not yet have any kind of sustainability programme in place. For sustainability to be a success in the pet industry, it is necessary for pet retailers and consumers to reward companies for their sustainable business practices.

### The 'One Paw One Planet' programme

To stimulate implementation, over the last two years PSC has successfully piloted the 'One Paw One Planet' programme, which creates visibility for those companies actively measuring and improving how they impact the communities and environments where they do business.

Due to its success so far, the programme is being expanded to further incentivise suppliers, manufacturers and brands to demonstrate continuous improvement. Additionally, it enables retailers to easily identify companies reporting their performance through a globally adopted third-party platform.

### Who can participate?

The programme is open for members and non-members of any pet company based in the US or Europe and/or any company exhibiting at Global Pet Expo, Zoomark or SuperZoo. Companies must complete the PSC Quick Impact Assessment to participate, and to maintain their eligibility they must show measurable improvement.

Those who achieve the highest performance and complete third-party verification will become eligible for additional visibility benefits. Companies who exhibit at selected trade shows receive large decals placed for display at their booth to attract visitors to – and engage them in – their corporate sustainability efforts.

### The PSC Quick Impact Assessment

The Quick Impact Assessment is a condensed version of the B-Impact Assessment, a globally recognised third-party performance metric developed by the non-profit B-Lab. The assessment measures key areas of performance. The results of the assessment, which are confidential, can be benchmarked against the performance of others to reveal the biggest areas of opportunity, impact and ROI. ♦

### One Paw One Planet programme at Zoomark


A committee of European pet companies is guiding PSC's strategic advancement into Europe. This committee currently includes: Beco, Brit, Duynie Ingredients, Evonik, Fish4Dogs, Josera, Pets International, Prins Petfood, Protix, Qrill, Takigawa and West Paw. The group's first effort is to expand the One Paw One Planet programme to Zoomark to serve as a simple and revealing opportunity for all companies to measure their sustainability performance.

For further information about the opportunities of the One Paw One Planet programme, see: [bit.ly/2CaINhS](http://bit.ly/2CaINhS)



**Caitlyn Bolton Dudas**

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



# Sustainability in pet food

**The pet industry's marketing choices lead to several issues that are at odds with a sustainable future.**

## Stewards of the Earth

Needless to say, we all want our pets to lead long and healthy lives. That requires access to good, high-quality foods that are as natural as possible, digestible, balanced, fortified and producing the smallest stools possible.

We also want to be good stewards of the Earth's resources. However, the pet industry's marketing choices are often at odds with a sustainable future, resulting in several issues as outlined here.

## Ingredient choices

In the US, market niches push us towards a 'humanisation model' where pets eat what humans might eat. Self-proclaimed internet experts have repeatedly demonised the pet food industry, and the industry's own marketing claims have demonised many of the largest, most efficient food crops (for

example, corn, wheat, rice, soybean) – without scientific evidence – as being 'bad' for pets.

The push towards 'grain-free' has moved us from efficient and abundant crops to less efficient ones with limited volumes. On the positive side, new and more sustainable fish sources (for example Alaska pollock) have entered the market under tight sustainability requirements (Marine Steward Council).

## Nutrition choices

Although dogs certainly like the taste of meats and fats, many scientific studies have shown that they might live a longer life with fewer health problems by eating a lower calorie diet with an adequate protein food regime. Yet over the last two decades, the protein levels in pet foods have climbed higher and higher, creating pressure on various protein ingredients which is unlikely sustainable.



### Acceptability choices

The US's pet food regulations define 'byproducts' as secondary products produced in addition to the principal product. Some meat ingredients are defined as 'meal' versus 'byproduct meal', even though many meat and plant products are secondary products. Improper marketing has opportunistically demonised the term byproduct leading to negative consumer acceptance in pet food – which is at odds with today's general trend towards encouraging efficient use of the whole animal in human food.

### Efficiency choices

Unlike in farm animal production, improving food utilisation in pets has never been a major marketing consideration, but processing, enzymes, hydrolysis and supplementation (with L-carnitine, for example) can produce many improvements. Meanwhile, over 20 million tonnes of pet food are produced each year in the US alone. With an average digestibility of 80%, that means that 4 million tonnes of excrement are produced that often end up in landfill sites.

There are some encouraging new initiatives to utilise food waste from grocery chains that can be used to produce pet foods. We should be open to all ingredients including proteins from insects, bacteria, yeast and sustainable fish. We must improve processing efficiency while delivering more digestible products. We must take account of shelf-life limitations. We should educate pet parents to understand caloric intake, digestion, food utilisation and proper balance. Lastly, I firmly believe we must shift from negative marketing concepts to positive ones. ♦



**Dr. George Collings**  
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# Food is the first medicine: natural food for pets



**Dingonatura produces high-quality natural pet food based on its own and exclusive recipes and brands, in line with strong ethical values.**

## **New and natural nutrition concept**

Dingonatura is a natural pet food company founded in 2001 based on the dream of producing natural and sustainable pet food products, which were almost unheard of back then. A team of industrial engineers, vets and nutritionists decided to take dog food to the next level by creating a natural nutrition concept. And so began a new way of understanding natural pet food production – without artificial or transgenic food, colourings or preservatives – using only natural ingredients whose origin and quality are well known, all analysed and verified by external laboratories.

The Dingonatura philosophy is that food is the first medicine, which is why the company produces natural food for pets and not pet food in large quantities. It is proven that good nutrition prevents

many diseases and helps pets to live a longer and healthier life.

## **Three ethical values**

The company has three ethical values: Protect, Respect, and Be Natural.

Protecting the animal is the first step to safeguarding its well-being.

Dingonatura is a cruelty-free company certified by PETA (no animal testing) and collaborates altruistically with shelters by donating food for their animals.

Besides, 'Wild Instinct' recipes approach the ancestral wolf to Dingonatura nutritional philosophy.

The company demonstrates its respect for the planet and the environment through its unique process of 'eco-cooking' (steaming and simmering) that promotes the ecological balance, through its choice of sustainable ingredients (locally sourced, free-range farms and sustainable fishing) that are

quality approved and certified, as well as through its small carbon footprint.

In 2019, Dingonatura will open a new clean-energy factory powered by liquified natural gas (LNG) only. Moreover, a cogeneration engine will utilise 85% of the energy generated.

Dingonatura is a member of the Pet Sustainability Coalition (PSC). Employees follow a continuous training plan to foster good sustainability practices in the offices, factories and warehouses.

## **International position**

Dingonatura is currently active in seventeen countries, including Germany, France, Italy, Greece, Switzerland, Finland and Portugal. The aim is to increase this presence to more than twenty countries in 2019. ♦

♦ **Dingonatura S.L.**  
susana.depedro@dingonatura.com  
dingonatura.com



Pets & Money  
UNITED KINGDOM

## Pets & Money Summit London to connect pet companies with investors and buyers

Summit taking place in London will bring together pet companies from across Europe and beyond with investors from angel, venture capital and private equity along with retailers and multinational consumer companies.

The Pets & Money Summit will be coming to London, 28 February 2019. The one-day event is dedicated to connecting pet companies from all product categories with financial buyers, strategic buyers and retailers. The summit is launching in Europe after a highly successful US summit in Austin, Texas, in December 2018.

### Aim of the day

The summit is tailored to make meetings between pet brands and investors as effective and efficient as possible. The events networking platform enables all attendees to contact and book private one-to-one meetings with all other attendees; great if you want to talk to new investors and retailers to secure new capital or partnerships.

### Start-ups and finance

The summit will host a Best in Show Spotlight, a unique opportunity for pet start-ups or early stage companies.

Twelve brands will be handpicked by a prestigious selection committee of industry experts. These twelve finalists will get the chance to present their business on the main stage to a room full of potential investors and buyers, followed by a live unboxing session where attendees can get hands on with their product or service. Any company can submit but should be actively seeking financial investment, acquisition, distribution or marketing.

Over sixty companies entered the spotlight for the US event with the finalists including apps, pet dating services and treat subscription services.

### Industry experts

The day will also feature an exciting array of presentations and panels from industry experts on how to grow in the European market and overcome the challenges it creates, along with current consumer

trends and advice on navigating the road to investment. Speakers include executives from Mars Petcare, Nestlé Purina Pet Care, Fressnapf, White Star Capital, alongside founders of innovative brands like DogBuddy, Butternut Box and BorrowMyDoggy.

With landmark transactions occurring across the European pet industry, investment appetite is rising. This is evidenced by Rover's acquisition of its European rival DogBuddy, by White Star Capital leading a £5 million (€5.6 / \$6.3 million) series A investment for Butternut Box and by Sovereign Capital Partners' sale of the Linnaeus Group to pet care giant Mars, in the firm's biggest ever exit. ♦

**For further information:**  
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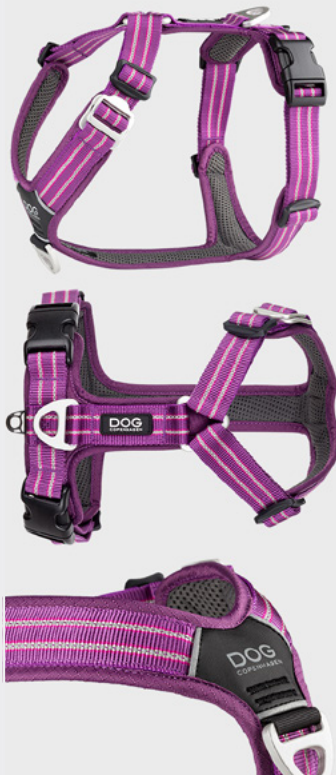
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# Comfortable and functional DOG gear suitable for everyday adventures

**DOG Copenhagen, the young Danish brand of high-quality matching dog harnesses, collars and leashes, is going international – and its growth rates are solid.**

## Keep it simple!

DOG Copenhagen launched its first basic collection in 2015 and has never looked back since then. The strategy to focus on a limited but carefully thought-out series of high-quality products has paid off. The company's selection of matching dog harnesses, collars and leashes has quickly gained popularity amongst retailers and end users.

## The devil is in the detail

Especially as a young company, one important benefit of focusing on a limited selection of products is the amount of time, dedication, love and devotion that can be put into the development process for every single product, from original idea to final product.

All products launched within the DOG Copenhagen range are carefully designed with this mindset, right down to the fine details that are tested, adjusted and

improved to the benefit of all quality-conscious dogs and dog owners. This has resulted in beautifully crafted products, ranging from a leash with on-board stuff sack for convenient carrying of treats and poop bags, to an ergonomic custom-fit harness with dual leash attachments and easy-grab handle.

## International growth

The majority of the company's products are sold internationally, including throughout Europe, and DOG Copenhagen is even represented as far afield as Australia, Korea and Japan. Its quick, dedicated and efficient customer service towards distributors, retailers and end users is considered a key factor in the company's continuous international growth.

## Future adventures

The company has just launched a new complementary series of matching dog

harnesses, collars and leashes to improve its product mix and additional new colour combinations will soon be included in response to customer requests.

A broader range of new products will also see the light of day further down the line, according to CEO Jan Bertelsen: "We have a lot of exciting ideas for future products designed for an active lifestyle with our beloved dogs who are the driving force that motivates us."

Moreover, expansion to new international markets is considered an important part of the company's future adventures, and the company is looking for dedicated distributors. ♦

♦ **DOG Copenhagen ApS**  
hello@dogcopenhagen.com  
dogcopenhagen.com



# Challenges and changes towards a more sustainable pet food industry

**Today's pet nutritionists have access to a wealth of ingredients to formulate nutritious diets for a range of pets, but this is not always a sustainable approach. This article explores the sustainability challenges for the pet food industry.**

## **A history of sustainable ingredient use**

Traditional pet food ingredients are often byproducts of human food processing: a sustainable outlet for products that are culturally unpopular or deemed second grade by individual nations' food standards. This helps reduce unused product destined for landfill or incineration and also adds value to such ingredients. So what are today's challenges towards a more sustainable pet food industry?

## **Today's owner demands**

The last decade has seen a shift in pet ownership; in general dogs are now more integrated into the family and many pet parents believe that they should be fed accordingly. Some owners are purchasing products containing recognisable human food ingredients, while others are becoming 'in-home nutritionists' formulating their own pet food with ingredients from their kitchen. In some respects we have come full circle from when pets were fed table scraps, although this time it is not so sustainable.

In response to demand, the pet food industry has seen an influx of high-end brands made with ingredients taken directly from scarce human food resources. The result is a paradox – encouraging consumers to move away from sustainable purchasing decisions rather than towards them.

## **Animal products in pet food**

Changes in traditional eating habits, a rise in disposable income and a growing world population have created greater demand for different foodstuffs, especially meat.

The National Farmers Union, an independent organisation representing the rights of the UK farming community, states that 'the world consumption of all meat has increased from 10kg per person per year in 1980 to 43kg in 2013. In China the increase has been even more pronounced – 19.1kg in 1985 to 58.8kg in 2013.' The use of meat in high-end pet products can only exacerbate the pressure on already limited resources.



### Vegetable products

The use of novel vegetables and grains to formulate hypoallergenic diets is also on the rise. As the global population continues to expand, arable land and water are becoming increasingly scarce. Rainforests are being destroyed for commercial plantations and traditional foods such as quinoa – the staple diet of indigenous Andean people – is being used as a novel ingredient. This has resulted in extensive cultivation in a part of the world with very specific biodiversity.

### Packaging

Globally we need to find more effective ways to curb further plastic pollution. One of the key challenges in pet food is the rise of the plastic single-serve product. Plastic pouches and trays are thriving in today's market, whereas cans are on the decline. An easy rip-and-tip single meal packaging solution removes the need for cumbersome cans often requiring refrigeration if not emptied in one feed. The pet food industry must invest in sustainable packaging solutions or move away from single-serve to more traditional packaging formats.

### How can the pet food industry help?

- Promote the use of rendered meat meal, offal and clean animal parts which are both sustainable and nutritionally valuable.
- Avoid using vulnerable animal protein species and invest in sustainability schemes.
- Invest in recyclable or biodegradable packaging and reduce multiple layering of plastics.
- Use locally sourced ingredients to reduce the carbon footprint and foster animal welfare.
- Investigate alternative protein sources such as insects or invasive species that may need a population check.
- Embark on strategies to educate customers on the nutritional requirements and natural preferences of their pet. More transparent ingredient labelling will increase trust amongst customers.



### Conclusion

In the early 20<sup>th</sup> century most pets were fed table scraps or scavenged. Now, in the 21<sup>st</sup> century, we are experiencing a non-sustainable modern twist on this as dogs are fed high-end human food diets or even home-made formulations using ingredients from the kitchen. Traditional pet food now has competition.

This is partly a self-perpetuating situation brought about by promotion of anthropomorphism and 'human-grade' ingredients, now ingrained in some pet owners. Increased humanisation of both packaging and products is at odds with environmental preservation and promotion of sustainability. The pet industry has a key role to play. ♦



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# Small mammal ownership and sustainability

**Exploring eco-friendly ways of keeping rodents and rabbits based on the industry's new, green solutions.**

## Safe and natural

Nowadays, it is possible to take care of small mammals in a sustainable way, thanks to the new green solutions provided by the pet industry. The key is to provide safe and natural materials for the habitat, accessories and bedding, and to offer a premium natural food that respects the needs of each species.

## Consider the habitat

First, the habitat has to be considered carefully. The goal is to mimic the natural habitat in the wild as closely as possible. For small digging rodents such as hamsters and gerbils, a glass terrarium is perfect because it allows a very thick layer of bedding. Examples include the Living World Green Eco Habitat

with its wooden frame and wheels, or the Skyline Marrakech terrarium. Natural wooden enclosures are the safest way of keeping rabbits and guinea pigs. It is important to offer a lot of space, especially for rabbits, allowing them to move around as they would do in nature. There are numerous products available on the market, like the Outback line and the Trixie Natura enclosures.

## The right materials for accessories

When it comes to accessories, it is best to avoid plastic, which is known to be toxic in the long run. Alternatives include ceramic plates or bowls (for example, by Zolux, Trixie or Living World) and glass drinking bottles (from Living World or Rongis). In an advance on wooden shelters, specialised brands



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like Kerbl, Oxbow, Living World and Trixie have now developed a whole range of houses, domes and tunnels made entirely of dried hay or herbs. They are 100% safe and non-toxic, and hence completely edible. Even hamster or mice wheels can be made of natural materials, such as the wooden RodyPlay wheel by Zolux. Organic chewable toys are also totally safe, like the Timothy Carrot by Oxbow or the rattan balls by Rosewood.

### Non-toxic bedding

Instead of pine wood shavings made with a toxic resin, many brands now offer eco-friendly bedding, such as the cellulose bedding in the Carefresh line which is safe, dust-free, non-toxic, 100% natural and recyclable. It is also very soft to allow small rodents to burrow. Safebed offers bedding with similar properties made of recycled paper. Hemp bedding is also very trendy, but not as absorbent as cellulose or paper.

### Food for thought

Food for small mammals should ideally be 100% natural and without additives, artificial colourings, aromas or preservatives. Some brands have actually achieved that, like Oxbow and its Essential line of pellets for rabbits and rodents. The food must also be adapted to each species. For instance, small herbivores such as rabbits, guinea pigs and chinchillas should not eat grain. Supreme Science's Selective Natural line of grain-free pellets is made from timothy hay, and Hamiform's Friandise Gourmande line even offers 100% natural, additive-free treats made from a mix of plants and herbs. ♦



Marie-Sophie Germain

Journalist and author specialised in pets  
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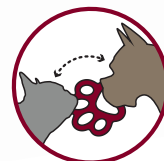
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# Calls for protein transparency in pet food

**In today's world, it is important to communicate clearly about the source of protein in pet food to improve transparency and hence build consumer trust. Pet food brands therefore need to put the focus on both the protein content and the quality of the protein in their products in order to stand out.**

## **Moving beyond the high-protein claim**

The high-protein trend in the UK food and drink industry is well established yet still growing. 48% of UK pet owners deem health-boosting ingredients to be just as effective for pets as they are for humans, so it is not surprising that high-protein claims are extremely attractive in the pet food market too.

However, since the protein content is already regarded as being the essence of meals for dogs and cats – with meat, fish or poultry as the primary ingredients – being high in protein is a base expectation rather than a desired quality for these products.

In order to stand out on the protein front and capitalise on the current health buzz around protein, pet food brands need to go much further than the high-protein claim and demonstrate exactly how strong their credentials are in this area.

This aligns with the Mintel Trend 'Prove It', which explores how increasingly savvy and well-informed consumers are doing their homework and expecting proof before purchase. This is creating a growing trend among pet food manufacturers who can boast a very high protein content to draw attention to the exact percentage of meat/fish/poultry in their products.

### Emphasising the quality of protein

While assuring consumers that meat, fish or poultry makes up a healthy majority of the pet food is important, it is not the be-all and end-all; many pet owners also recognise the relevance of 'quality over quantity'. In fact, according to Mintel research on the UK pet food category, six in ten adults with either a cat or a dog in their household note that the quality of meat is more important than the overall meat content in pet food. This reflects that there is a wide array of very cheap, low-quality and hard-to-digest animal byproducts that can be used to make processed pet food.

### Openness aligns with a wider desire for transparency

Half of UK cat/dog owners find the ingredient lists on pet food – which are often shrouded in mystery with vague ingredients such as 'meat meal' or 'meat byproducts' and unrecognisable additives – difficult to understand. This has sparked strong demand for brands to be much clearer in this respect. The challenge for pet food producers is to provide greater openness in order to build brand trust. Being absolutely transparent about their ingredients and telling consumers the exact proportion of meat/poultry or fish in their products while pointing out the 'real' and familiar cuts – such as chicken breast or fillet of fish – is a compelling way to showcase genuine high quality.

### Final thoughts

Providing a source of protein is a bare minimum for meals for pets. To capitalise on the current buzz around protein and its associations with health, pet brands must not only prove their high-protein claim but must also reassure consumers about the high quality of the protein in order to win their trust. Clear labelling, including spotlighting the use of recognisable 'real' cuts of meat/poultry/fish, can help to meet this demand for more transparency. ♦

### Pet food launches placing the focus on high-quality protein in the UK



#### Vet's Kitchen Natural Cat Food

Contains 80% chicken and a high percentage of single-source animal protein for carnivores and prebiotics for digestive health.



#### Encore Tuna Fillet with Prawn for Adult Cats

Contains completely natural ingredients, made with 55% tuna and 20% prawn, no additives.



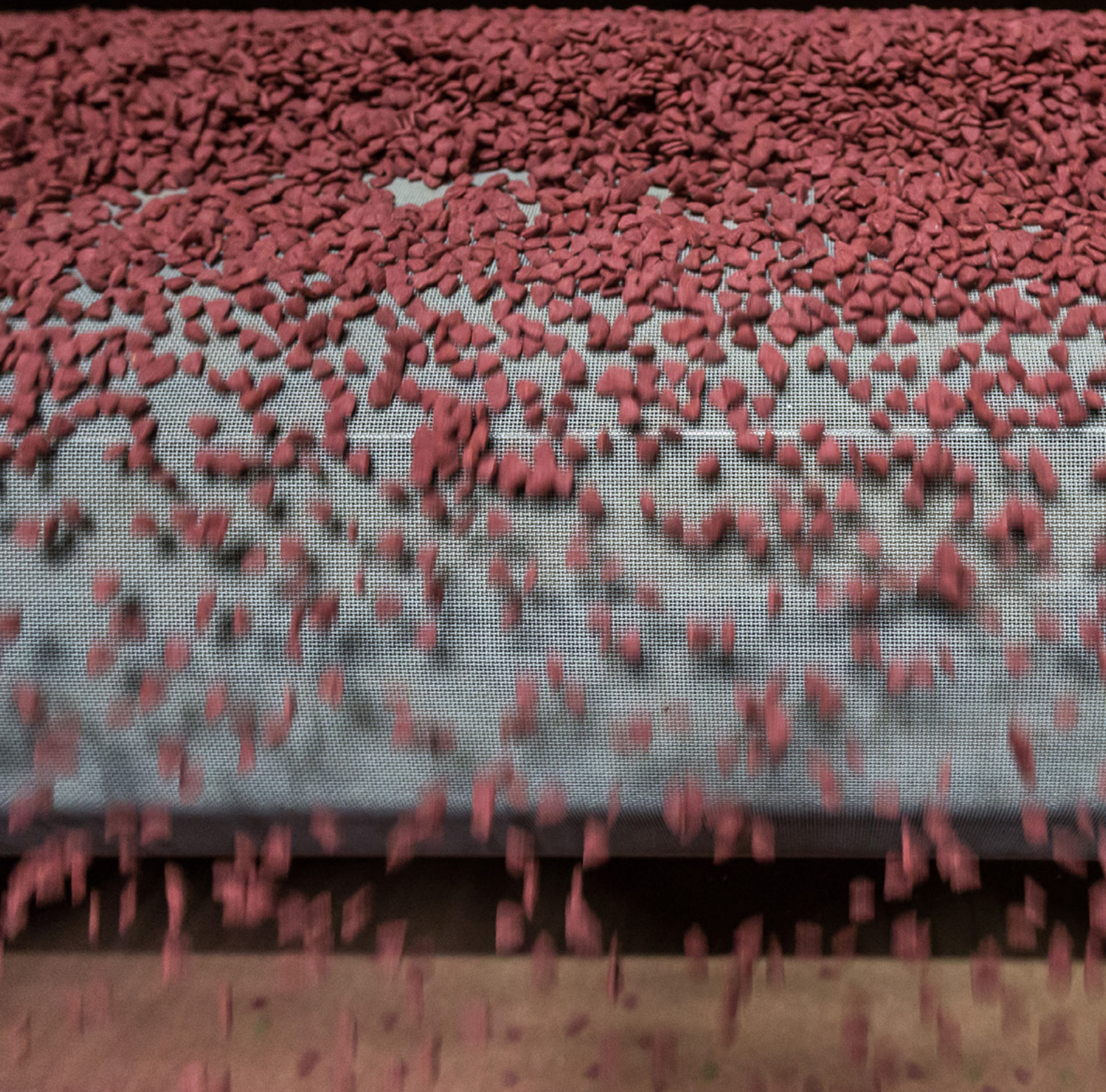
#### Thrive Premium Plus Chicken Grain-Free Cat Food

Made with 90% chicken, balances easily digestible high-quality chicken with a very low carbohydrate content.



**Chris Brockman**

Director of Food & Drink Content, Mintel  
info@mintel.com  
mintel.com







# Sustainable ingredients and production

Not many people question the need to be sustainable, but in practice it is easier said than done. These insights can help.

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# Introducing Humanisation 2.0

**The trend towards humanisation may seem to be at odds with the need for greater sustainability in pet food. What is the solution?**

## Role of cats and dogs

Cats and dogs play an important role in modern society as working animals and pets that bring companionship, health benefits and support learning skills. The pet food industry therefore has a moral obligation to ensure that future generations enjoy these benefits, in other words, to ensure pet food sustainability. This requires rethinking humanisation.

## Sustainability pressures

Some argue that the widespread use of rendered animal byproducts (ABPs), like animal proteins and fats used in dry diets, contributes to making the pet food industry more sustainable. With the trend towards humanisation, however, comes the tendency to see these types of ingredients as inferior and of substandard quality.

In the face of the urgent need to drive sustainability and feed a projected 9 billion humans by 2050, the industry is likely to come under increasing scrutiny on pet food raw materials specification. Many already consider it unacceptable to use human grade muscle and organ meats solely to meet demand for humanisation of pet food and increased scrutiny of humanisation seems inevitable.

## Redefining humanisation

What is the way forward? One option is to refocus humanisation on 'nutritional sustainability' aligned to FAO guidelines to support sustainable, safe, nutritious food for all. It is evident that pet food is already aligned with this concept to the extent that it has a low environmental impact, contributes to healthy life for present and future generations and is nutritionally adequate.

## Sustainable ingredients and production

The concept of 'nutritional sustainability' of pet food is not new, as evidenced by a 2013 paper entitled exactly that, which concluded:

*Pet food professionals have the opportunity to influence the sustainability of pet foods through product design, manufacturing processes, public education, and policy change.*

*A coordinated effort that includes all parts of the pet food industry, including ingredient buyers, formulators, and nutritionists, can improve the sustainability of pet foods and pet ownership.*

*(Swanson et al, 2013, Nutritional Sustainability of Pet Foods; American Society for Nutrition. Adv. Nutr. 4: 141–150, 2013)*

Market research indicates that millennials have the greatest spending power when it comes to pet food and are willing to pay more for 'sustainable' products. The key challenge for the industry is to drive that sustainability through innovation, for example, by using cereals of lower, AB, quality instead of top, AA, quality, and by viewing humanisation differently.

### Using sustainability certification

Another challenge is to build trust in sustainability projects and deliver tangible social, environmental and financial sustainability – the so-called triple bottom line. People can be suspicious of a company using sustainability as a 'marketing' tool, so ensuring credibility is key.

Using sustainability certification can help, especially when combined with effective communication. Certification provides a framework for implementing sustainability and the substantiation of claims and can boost trust. However, as a study\* by Maastricht University for MVO Nederland (CSR Netherlands) found, it does not necessarily do so.

### When sustainability certification is useful and when it is not useful

Useful	Not Useful
When certifications serve as a learning tool	When certifications are too broad or too narrow
When certifications serve as a networking tool	When certifications are cost-prohibitive
When certifications provide legitimacy and competitive advantage	When certifications are not independent
When certification serves as a risk management tool	When certifications are merely a PR campaign
	When certification is looked upon as the panacea

*\*Source: Certification: a Sustainable Solution? Insights from Dutch Companies on the Benefits and Limitations of CSR Certification in International Supply Chains (MVO Nederland, January 2015)*

### Humanisation 2.0

To satisfy the needs of millennials and ensure a sustainable pet food industry for future generations, there is a strong argument to redefine humanisation in terms of nutritional sustainability backed up with sustainability certification and communication to demonstrate trust and substantiate claims.

Redefining humanisation in terms of nutritional sustainability provides the way forward to ensure future pet food sector stability and growth for future generations. Humanisation is dead, long live Humanisation 2.0! ♦



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# Continuously reaching a higher level of sustainability with pet food ingredients

**In a world where sustainability is becoming increasingly important, Duynie Ingredients – a producer of high-value plant-based ingredients like potato, chicory and sugar beet – plays a significant role in contributing to sustainable pet food consumption.**

## Transparency

Duynie Group has been active in the sustainable management of plant-based co-products for more than 50 years. It gives Duynie Ingredients, being part of the group, a unique position in the market. Knowing where the raw materials come from enables Duynie Ingredients to offer its customers – pet food producers all over the world – complete transparency. It also guarantees a constant, year-round supply of products with stable properties and of consistently high quality.

## Striving for climate-neutral production

“Our raw materials are co-products of the food industry. Processing them into high-quality ingredients for the pet food industry is very sustainable because it ensures the optimal use of crops so that nothing is wasted,” explains CSR Manager Corine Kroft.

“We use sustainably generated heat for drying the wet incoming co-products,” continues Corine. “Residual heat, released at bio-fermentation plants.” Duynie Ingredients is building a new plant next to the green-energy power station in Cuijk, the Netherlands, where locally produced wood cutting chips are processed into green electricity. This high-end sustainable plant, which is set up to process all kinds of vegetable ingredients, will increase Duynie Ingredients’ production capacity to meet the growing demand for sustainable ingredients.

## Tailormade vegetable blend

The addition of vegetables to its product range is the result of listening to customers and building partnerships. Vegetables are increasingly used in the production of food for dogs, cats and small animals because they are a good source of vitamins, minerals and fibre.

In response to the request by pet food manufacturers for a vegetable blend, Duynie Ingredients has created a blend with a unique combination of vegetables, suitable for use in different recipes. Customer benefits include saving on storage space, reduced handling of various products and the possibility for tailormade production.

## Pet Sustainability Coalition

Customer partnerships and following the latest pet food trends are two very important aspects of staying ahead in a continuously changing market. Therefore, it was a logical step for Duynie Ingredients to join the Pet Sustainability Coalition (PSC) in 2018. “It is valuable to work together with PSC to improve our sustainability performance and to contribute towards a more sustainable pet industry,” states Corine.



The Quick Impact Assessment (QIA) forms part of the membership. "It was good to complete the QIA with the PSC team. Corporate social responsibility (CSR) is totally integrated in the mission of Duynie Ingredients and gives us a high ranking," she adds enthusiastically.

"We have already made initial contact with other PSC members to exchange experiences. The next step is to define actions to make our business even more sustainable and to continuously reach a higher level." ♦



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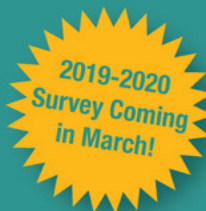
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# Feeding the Future

**How one company is leading the way in ensuring consumers can feed their pets in a sustainable way.**

## **Need for sustainability**

We live in an age where pet owners have easy access to information and opinion about brands, pet foods and ingredients. Novel ingredients such as insect protein have entered the market, partly driven by novelty, but mostly by sustainability. A growing awareness of the pressure we put on our planet's resources has increased consumers' interest in feeding their pet a sustainable, ethical and traceable food.

Suppliers to the pet food industry have a responsibility to manufacture nutritionally sound and legally compliant materials, whilst meeting customer demands. Trouw Nutrition takes this seriously: it is part of Nutreco, whose mission is 'Feeding the Future' – to feed our growing population (including their pets) in a sustainable way for generations to come.

## **Responsible sourcing**

Trouw Nutrition is a member of SEDEX, an indication of its commitment to continuous improvement of the ethical performance in its supply chain. The company

sources its raw materials from suppliers who have adopted its Supplier Code of Conduct, and therefore share its commitment to sustainability.

What does this entail? As a minimum, suppliers must be compliant with relevant environmental laws and regulations, but are strongly encouraged to go further. They must use environmental resources in an efficient and sustainable way and strive to minimise their impact on biodiversity, climate change and water scarcity, at the same time ensuring that labour employment procedures are applied in an ethical manner.

## **Traceability**

Following the horsemeat scandal of five years ago, traceability continues to be high on the agenda of pet owners. The company also oversees a bidirectional audit trail for its pet premixes, covering the materials coming in and the premixes going out.

Each of its raw materials and suppliers are separately risk assessed prior to an audit and

testing programme being assigned. That way, any sustainability issues throughout the supply chain can be identified and minimised, and material quality guaranteed.

### Sustainable partnerships

Furthermore, as a group, Nutreco actively involves employees and stakeholders in its mission of 'Feeding the Future'. 'We welcome open dialogue with our suppliers and raise the standards within the industry by working towards a culture of continuous improvement,' it says.

Local operations have control programmes in place to protect the surrounding environment and are COMAH accredited. Active efforts are also underway, in consultation with customers, to concentrate pet premixes as part of a project to reduce volume and transport.

### Nutreco's sustainability programme - Nuterra

Guiding all of this is Nuterra®, which is the Nutreco group's sustainability programme, and is aligned with the Sustainable Development Goals of the United Nations. Recognised as among the leaders in driving a more sustainable industry, Nutreco has been named one of ten finalists for the 'edie Sustainability Leaders Awards 2019' in the UK.

Supplying superfoods, plant-based proteins and feed additives, Trouw Nutrition and its parent company Nutreco, are raising the sustainability standards in the industry and furthering their mission of 'Feeding the Future'. ♦



**Alexandra Wesker**

Pet Customer Technical Adviser  
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# How do you select raw materials sustainably?

**Practical guidance on how to apply sustainability to raw materials selection has been hard to find. Until now.**

## **Sustainable, but how?**

Sustainability is becoming a vital part of our everyday life. It is currently the best concept we have to produce and consume products efficiently, in a lasting and resilient way (stable shelf-life, preservation of qualities), with maximum benefits for health and the environment (balanced nutrition, low associated emissions).

But there is not much guidance offering viable and practical advice on how to improve the sustainability of a product to achieve and demonstrate a significant advance. This brief overview aims to provide such guidance.



## Sustainable ingredients and production

### Assess and identify

Sustainability is a concept which calls for a holistic, life-cycle thinking. Look at your product, not as a combination of nutrients, tastes and smells, packed in attractive packaging, but as interlinked network chains of previous processes needed to create the product, consume it and manage the waste.

Pet food, like any food or biomass, has particular characteristics which differentiate it from other common goods.

The biggest impact of everyday goods we use, including electronics, cars, and household appliances, comes from the use phase. The biggest impact for pet food is associated with the production of raw materials. This is less obvious when it comes to plant-based products, but much more noticeable if a product contains animal-based components.

That is why, at the German Institute of Food Technologies, so much attention is devoted to the sustainability analysis, using life cycle assessment, of the raw materials used to produce extruded intermediates, meat-based and hybrid products, emulsions and natural colourants.

Through this work, the Institute has been able to identify a few strategies, which can be applied to enhance the sustainability of pet food products.

### Seek to substitute

First, consider substitution of high-impacting components (meat) with low impacting plant-based or animal-based materials. It creates enormous potential for innovations in product development triggered by the protein-protein interactions from different sources.

Precise attention should be paid here to the nutritional composition of an end-product, as a reduction in animal-based components might lead to insufficiency of specific components. Hybrid products (high environmentally impacting meat with low impacting meat, meat-fish, meat-plants) are becoming an interesting solution, enabling the maintenance of both nutritional properties and sustainability levels.

### Streamline impact

Second is what might be called 'streamlining' of sustainable impact. It is achieved through processing, but still associated with the selection of starting raw materials. For example, prefer integrating processing stages to combining separate processing stages and the extension of processing lines.

Integration of processing (for example extrusion versus separate cutting, mixing and cooking) should be also performed with initial processing biomass in mind. Multiple experimental trials indicated that it is possible to use moisturised, whole (non-purified) raw materials to produce similar texturised products, both dry and moisturised.

The short overview is not complete but provides valuable insights for the practical application for the enhancement of product sustainability. ♦



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# Sustainability in action

How a Norwegian producer of natural protein, fibre and starches builds respect for the natural environment into everything it does.

## Natural responsibility

As individuals, organisations and governments, we are all obliged through environmental laws to protect the natural environment. Our aim is to conserve natural resources, protect the natural environment and where possible, repair damage and reverse trends.

Norway takes protecting the environment and tackling climate change seriously and was one of the countries participating in the United Nations Kyoto protocol and the Paris agreement, to protect the environment and fight climate change.

Vestkorn, a Norwegian producer of natural protein, fibre and starch concentrates from the dry processing of pulses, shares that commitment. Drawing on a high level of environmental awareness, its factory is designed and run in a way that respects the natural environment.

## Robust sustainability policies

How does it do that? Vestkorn is committed to sustainable policies addressing the key themes of energy supply, agriculture, waste management, transport and air quality.

## Energy supply

The company has one production site in Norway, located next to a stream running directly into the sea. Through the use of a water turbine, this stream provides sustainable energy to the plant.

## Agricultural policy

The core raw materials processed are pulses, nitrogen fixing plants that protect the fields from erosion and naturally fertilise the soil with nitrogen.

## Waste management

The company's philosophy is not to create waste. Peas are processed into protein,

starch and fibre, using physical and mechanical processes. No chemicals are used. Materials like paper, metal, glass and wood are all recycled.

## Transport

Pulses are supplied by ship, reducing road traffic and pollution per ton of raw material transported. The vessels used for transporting the pulses run on fuel with low sulphur content. Finished products are transported by train where possible.

## Dust

The production of powders naturally creates dust, although this is reduced by compressing the powder into pellets. Filtration systems prevent the dust entering the environment and dust from factory equipment is recovered by filters and recycled.

This brief overview summarises how Vestkorn puts sustainability into action. To learn more, please contact CEO Aslak Lie. ♦

♦ **Vestkorn AS**  
aslak.lie@vestkorn.no  
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WHO infographic on pollution sources





# Sustainable business practices

As organisations of all sizes increase their efforts to make business practices truly sustainable, we look at the many tools that can help them. Meanwhile, natural materials – such as pineapple leaves and rabbit fur – are becoming the latest innovations to replace plastic.

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# Sustainability moves from add-on to business opportunity



Since 2015, with the Paris Agreement and the Sustainable Development Goals, front runners have increased their efforts to show the value of including sustainability in their business strategy. They are moving from 'doing no harm' to focusing on 'doing better'.

## Better business, better world

Business is changing. No longer is there solely a financial focus. Today, businesses also aim to contribute from a social and environmental perspective. In their communications, businesses increasingly focus on their efforts to do so by highlighting their contribution to the Sustainable Development Goals (SDGs). The Valuing the SDG Prize in Food & Agriculture report (October 2016) published by the Business and Sustainable Development Commission states that companies could unlock \$2.3 trillion (€2 trillion) a year in

the food and agriculture sectors by 2030 with an annual investment of \$320 billion (€280 billion) in sustainable business models. This could also lead to more than 80 million jobs!

## Common language and framework

The SDG agenda, although initially set for governments, provides a common language and framework for businesses, governments and NGOs alike. For governments, the SDGs provide sustainability goals for the coming twelve years. For companies, SDGs are an opportunity to align their



strategy and sustainability policy with country policy. They are one of many frameworks (like the Global Reporting Initiative (GRI) and the International Integrated Reporting Council) companies can use to better understand global priorities and their stakeholders' areas of interest.

### Applying sustainability

The Pet Sustainability Coalition ([petsustainability.org](http://petsustainability.org)) Toolkit provides guidance that ranges from a Quick Impact Assessment (QIA) to more detailed support on aspects such as strategy, supply chain and packaging. The QIA is a starting point for evaluating your company's strengths and weaknesses before developing a customised sustainability strategy. It indicates the benefits of a sustainability strategy, that is, saving money, increasing employee satisfaction and productivity, reducing risks, innovating products and services, and meeting

increasing social and environmental expectations from retailers and consumers. And it helps you to understand the impact of your business on the SDGs, so you can be transparent about your contribution to solving global challenges. Customers, employees, society and investors increasingly expect that of you.

### SDG guidance for businesses

Initiatives such as the SDG Compass (Figure 1) and the Cambridge Institute for Sustainability Leadership have started to translate the SDGs into useful company targets and indicators. The aim is to provide businesses with guidance on how to align their strategy with the SDGs, and to enable them to measure and manage their contributions. The SDG Compass, authored by GRI and the UN Global Compact, can help businesses navigate through the process and identify synergies between the frameworks they are already working within.

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FOCUS 14 GLASS AQUARIUM WHITE	14L / 3.7G	30L X 22D X 27CM H	100 L/HR	7.5W
FOCUS 25 GLASS AQUARIUM BLACK	25L / 6.6G	40L X 25D X 31CM H	100 L/HR	7.5W
FOCUS 25 GLASS AQUARIUM WHITE	25L / 6.6G	40L X 25D X 31CM H	100 L/HR	7.5W
FOCUS 36 GLASS AQUARIUM BLACK	36L / 9.5G	50L X 25D X 34CM H	230 L/HR	12W
FOCUS 36 GLASS AQUARIUM WHITE	36L / 9.5G	50L X 25D X 34CM H	230 L/HR	12W
FOCUS 23 GLASS AQUARIUM BLACK	23L / 6G	30L X 22D X 41CM H	230 L/HR	12W
FOCUS 23 GLASS AQUARIUM WHITE	23L / 6G	30L X 22D X 41CM H	230 L/HR	12W

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## Sustainable business practices

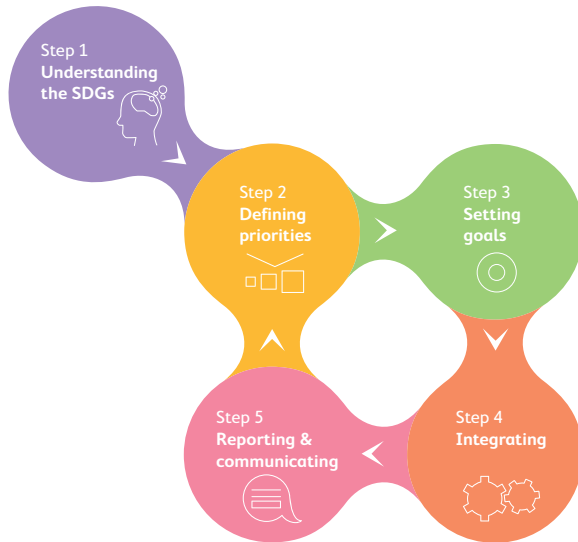


Figure 1. Five steps for companies to maximise their contributions to the Sustainable Development Goals (SDG Compass).

### Working with the SDGs

Over 60% of businesses globally recognise the importance of taking action on the SDGs. Organisations should focus on the goals that are the most relevant for their core activities. These are the activities where a company can achieve the greatest impact. But besides these primary goals, it is also important to take the other SDGs into account, as an organisation's actions might have conflicting effects on the SDGs. An example of this was an effort to reduce CO<sub>2</sub> emissions when generating energy for a factory. A large dam was created to provide hydro energy. This benefits the company's contribution to lowering carbon emissions, enabling it to report on positively impacting on SDG 7 (Affordable and clean energy) and 13 (Climate action). However, it negatively impacts on SDG 14 (Life below water) and 15 (Life on land), as it changes a large part of a region's landscape and natural habitats, and affects the communities living on and from it. It is important to bear in mind that there are trade-offs, and to be open in your communications.

### Developing your sustainability strategy

Since the 169 targets within the 17 SDGs are relevant to countries rather than businesses, most companies keep the SDGs in mind when developing a strategy, but not their specific indicators. A business

will research and use the many key performance indicators that are relevant to them, enabling them to compare their progress with others and use that as a benchmark. Identifying the SDGs within their focus also allows a company to find partners to increase the effectiveness of their own strategy. The SDGs can therefore serve as a framework for businesses to grow and become more competitive, especially in an increasingly volatile and complex world.

### Communicating your SDG progress

Even though more and more businesses are using the SDGs, this is often not reflected in their revenue streams. A missed opportunity. Philips is an example of how it can be done. The company aims to improve the lives of three billion people a year by 2025. This goal is linked to SDG 3 (Good health and well-being). 95% of Philips revenue is now SDG-related, mainly by linking the percentage of product revenue made using eco-design and circular economy principles to SDG 12 (Responsible consumption and production).

A current trend within sustainability communications is omitting the positive contribution to society and only indicating the costs of the effort. All organisations should show how the SDGs affect their activities, both positively and negatively. Transparency is increasingly expected by customers, employees, society and investors. So it is also vital for getting your projects financed, retaining your customers and employees, and gaining access to the brightest young talent for making your business sustainable. ♦



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# Increasing demand for environmentally and ethically responsible products



**A sneak peek at a new report that shows how brands are being held accountable for their own business practices and those of their suppliers.**

## **Changing pet landscape**

New data is available that further explores the changing landscape of business expectations in the pet industry, as demand increases for environmentally and ethically responsible products. The Pet Sustainability Coalition (PSC) and the World Pet Association (hosts of the US SuperZoo trade show) partnered in 2018 to take a pulse on a rapidly advancing issue for the industry. They surveyed over 225 pet professionals and will release a full report in early 2019.

Pets International has worked with PSC to have a brief glance at this innovative data as part of its mission to drive the industry toward positive environmental and social impact, and to equip its readers with cutting edge information that helps their businesses succeed.

## **Expectations are increasing... and fast**

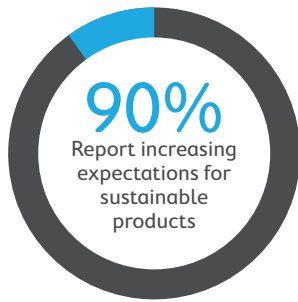
The data shows a dramatic increase in pressure on businesses to expand their responsibility from strictly shareholder value to demonstrating responsible treatment of communities and environments where they do business.

This expansion in business accountability means that brands are held accountable not just for their own business practices, but also for the practices of their tier 1, tier 2 and tier 3 suppliers.

## **Current sustainability programmes are ineffective**

Only 23% of pet industry professionals rank their own sustainability programme as effective, and 26% report that they have no sustainability programme at all.

## Sustainable business practices



### What is needed to meet expectations?

Not surprisingly, this increase in accountability for businesses is fuelling a need for more education. The industry needs to be informed about what is expected of them. How good is their current performance? What tools are available to ease implementation? Particularly small businesses should be aware of collaborative opportunities, as they need more leverage to drive systematic improvement in areas that are too large for one company to change on its own.

### PSC is successfully serving businesses

Headed into its sixth year as an organisation, the Pet Sustainability Coalition is making a difference. Coalition member companies show an impressive skew in positive data, reporting much higher access to education and tools and a higher interest in collaborating. Collaboration is key if the industry is to address the bigger sustainability issues. This includes agricultural impacts and equitable labour practices as well as the ability to better trace materials and ingredients from extraction to production, retail and end of life.

The full report is available for download on the Pet Sustainability Coalition website. If you are interested in strengthening your business through profitable environment and social practices, you can now join PSC, who expanded its membership to Europe in May 2018. ♦



**Caitlyn Bolton Dudas**  
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## People, planet and profit: keeping pace with the changing landscape

**The Paris Agreement is forcing companies to take action to tackle climate change. How can you help your organisation to become more sustainable? What lessons can be learned from the early adopters in the pet industry?**

### Why?

We cannot ignore the facts any longer. There is an urgent need to make the pet industry much more sustainable than it is today. However, sustainability goes beyond just reducing CO<sub>2</sub>. It is also about a company taking responsibility for the effects of its business activities on people, the environment and business operations. A corporate social responsibility (CSR) policy helps a company to make conscious choices to strike a balance between people, planet and profit, and can even go a step further by increasing the focus on innovating profitably for people, society and the environment.

### Assistance

Although it is not easy to take the first step, there are various platforms that can assist you. For example, B-Corp is an internationally recognised seal of approval for CSR. There are currently over



2,600 B-Corp-certified companies in 150 industries worldwide, yet in the pet industry there are so far only three companies with this quality seal: Lily’s Kitchen, P.L.A.Y and West Paw.

### What can we learn from the early adopters?

West Paw was the first pet company to obtain B-Corp certification in 2013. Lily’s Kitchen followed in 2015 and P.L.A.Y in 2016. All of them were driven by the internal motivation to make their company more sustainable.

Reducing waste was one of the first issues Lily’s Kitchen wanted to tackle. The company states: ‘We do not sell our wet cat food in pouches as they are not recycled and go straight to landfill. We could not sleep at night knowing the impact this has on our beautiful countryside. A cat would go through 1,095

pouches per year alone – that is 8.8 billion pouches to landfill if you consider how many cats there are in the UK.’

West Paw wanted to be a part of the current global shift in which companies are becoming more interested in using their businesses for good as opposed to just turning a quick profit. This also brings financial benefits, because consumers are increasingly looking beyond a company’s marketing and focusing on third-party certification too.

P.L.A.Y had long admired companies with B-Corp status and decided to find out more about the certification programme, only to discover that it covers P.L.A.Y’s own values and beliefs. B-Corp certification is definitely not restricted to big corporate companies only. The opposite is true, in fact.

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## Sustainable business practices



### Certification experiences

B-Corp covers the full business model of companies.

This can seem daunting at first, as P.L.A.Y recalls:

'There were a lot of questions we had to answer and provide supporting documentation for. The main hurdle of becoming certified was the time and resources we had to spend gathering the information, doing the assessments, and the review calls.'

Lily's Kitchen had a similar experience, commenting:

'Doing the right thing, taking responsibility and making a difference is at the heart of our business. This can be a long and difficult process but one we will not compromise on.'

### The benefits

Each company has to re-certify from time to time to extend its B-Corp seal, but even this can be beneficial, as West Paw has discovered: 'Having now completed the certification three times, we have continued to improve our internal processes to make the work more efficient and also more impactful on how we can improve our business.'

All three companies indicate that their clients are very proud of them. Certification is an important unique selling point (USP) in a saturated market,

which also helps them to convey their corporate values and company positioning clearly and concisely.

Becoming a 'B-Corp' means becoming part of the B-Corp network. This helps companies to broaden their horizons, benefit from sharing experiences with others and learn how to improve.

### How to take the first step

In the pet industry, the Pet Sustainability Coalition (PSC) – with members in both North America and Europe – facilitates the Quick Impact Assessment. This is a condensed version of the B-Impact Assessment, which is a globally recognised third-party performance metric developed by the non-profit B-Lab. This step-by-step approach guides you towards improved sustainability in order to ultimately achieve B-Corp certification. ♦



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## Sustainable business practices

Many countries are addressing this global problem. The UK has pledged to eradicate all 'avoidable plastic waste' by 2042. India will eliminate all single-use plastic by 2022, with an immediate ban in urban Delhi. Sri Lanka has banned polystyrene and China is insisting on biodegradable bags.

The first-ever European Strategy for Plastics in a Circular Economy was adopted in January 2018, aiming to transform the way plastic products are designed, used, produced and recycled in the EU. Better design, higher waste recycling rates, plus more and better quality recyclates will help boost the market for recycled plastics and discourage single-use.

In May 2018, the European Commission proposed new EU-wide rules to target the ten single-use plastic products most often found on Europe's beaches and in the sea, as well as lost and abandoned fishing gear which constitute 70% of all marine litter.

### It is plastic but not as we know it

Legislation is not entirely negative, as banning something for good reasons often leads to the creation of innovative alternatives.

In a comprehensive report published in June 2018, UN Environment has presented an A-Z of 35 potential bio substitutes for plastic. This runs from Abaca hemp (from the inedible banana *Musa textilis*) to Zein (from a maize protein). The list includes rabbit fur, sea grass, foam made with fungus and Piñatex™, a material made from pineapple leaves.

Viable alternatives are popping up all over the world. Another example comes from a group of designers in Japan who have created a prototype seaweed design using a seaweed-derived substance called

agar as a biodegradable substitute for conventional plastic packaging. Boiling certain types of algae and dehydrating the resulting soup creates a variety of shapes and textures that could replace plastic film or foam packaging.

Researchers are also revitalising the idea of converting casein, the principal protein found in milk, into biodegradable material that matches the stiffness and compressibility of polystyrene.

And what could be more appealing than technology that takes waste out of landfills and transforms it into biodegradable plastic? In the US, disposing of chicken feathers is a huge problem, with more than 1.4 billion kg having to be dealt with annually. Thanks to innovation, feathers may soon be a resource for a new water-resistant thermoplastic. They are composed almost entirely of keratin, a protein so tough that it can give strength and durability to plastics.

### Sustainable friend or foe?

Do you have a proactive plan in place for using plastic alternatives before legislation forces you to do so?

Further inspiration, advice and support are available through bodies such as the Pet Sustainability Coalition. There are also companies who specialise in designing sustainable products and packaging, such as Trayak in the US, whose tools allow designers and engineers to incorporate environmental feedback at every stage of the product or packaging development process. ♦



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# North America

**In the US and Canada, humanisation and premiumisation are driving the pet industry forward. While online and offline channels fight for their places in the market, one thing is certain: there are significant opportunities for all in 2019!**

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# Changes and growth in the US pet industry

**A booming market both online and offline could take sales to over the \$100 billion (€88 billion) mark by 2021.**

## Increasing 5% per year

The US pet industry continues along a healthy growth trajectory, with product and service sales rising about 5% annually in dollar sales. Online is booming and strong numbers in veterinary services as well as pet food and treats contribute to the advancement of the total market, which Packaged Facts estimates at \$90 billion (€79 billion) in 2018 for veterinary and non-medical pet services along with food and non-food supplies.

## A four channel race

Four retail channels account for double-digit shares of pet product sales. In the lead are pet speciality chains (including PetSmart and Petco) with a 23% share of sales. Next in line are discount stores or supercentres (including Walmart) at 21%, and supermarkets and the internet have 14% each.

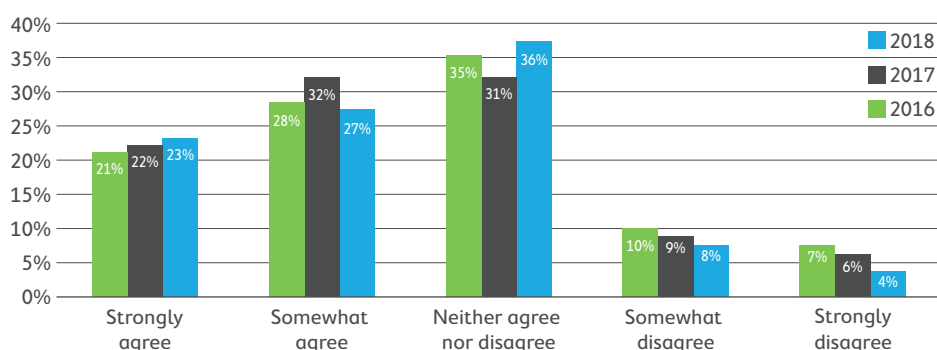
The US pet industry has long been rich with opportunity, but the market is now reconfiguring at a dizzying pace. E-commerce sales are challenging most market norms, and more widespread use of internet search and mobile apps is compounding this effect. Despite the long-established and wide-ranging presence of both general merchandise and speciality stores selling pet products, the internet (led by Amazon and Chewy) has emerged as the second-largest channel for non-food pet supplies. By 2019 it will have surpassed supermarkets to become the third-ranking for pet supplies overall.

## More shoppers going online

The internet is disproportionately responsible for helping to keep the US pet industry on an upward track, that is, not just stealing share from brick-and-mortar stores, but also expanding the market.

## North America

### Level of agreement with statement: 'Natural/organic brand pet products are often better than standard national brand products', 2016–2018 (% of pet owners)



Source: Packaged Facts Surveys of Pet Owners

A wider and more premium array of pet products is available to a growing base of online shoppers. During 2017, nearly \$6.8 billion (€6 billion) worth were sold online, estimates Packaged Facts. That figure is expected to easily double by 2022.

#### Natural becomes the standard

Two overlapping trends – both in force for nearly two decades, and both primarily marketing-driven – continue to propel the infusion of new products and services into the US pet market: humanisation and premiumisation. Potent as these market drivers may be, they are now widely dispersed, so marketers increasingly need to think outside the box.

Natural pet food has been the brightest star in the food category. Although that star still shines brightly, its orbit is shifting. In Packaged Facts' Q1 2018 Pet Owner Survey, half of the owners agree that natural or organic brand pet products are often better than standard national brand products, and 23% strongly agree – a percentage that has risen since 2016.

'Natural' is therefore increasingly 'standard'. For the first time in years, mass channels in the US market are surpassing the pet speciality channel in pet food sales growth. This phenomenon is directly attributable to 'mass premiumisation' – the increasing diffusion of 'superpremium' brands into mass-market retailers such as supercentres and supermarkets, rather than them being largely restricted to the pet speciality sector.

Partly as a competitive consequence, Packaged Facts expects to see the progressive edge of 'superpremium' pet food shift from the ingredient label to broader, more holistic concerns such as the preservation of natural nutrition (largely through fresh pet foods) and the increasingly proactive involvement of prestige marketers and retailers in economic system, sustainability and animal welfare initiatives.

#### Medical and non-medical expanding

Also seeing a great deal of activity is the veterinary category, including ongoing consolidation and the increasing involvement of major marketers (Mars buys VCA) and big box stores (Petco launching Thrive complete veterinary services; PetIQ opening veterinary clinics in Walmart). Non-medical pet services also continue to expand, benefiting from the increased involvement of pet speciality big box stores looking to compete with online, and from the rapid advancement of Uber-like pet sitting services.

Looking ahead, Packaged Facts expects US pet industry sales to post a compound annual growth rate (CAGR) of approximately 4% over the next few years, bringing the market to \$101 billion (€88.5 billion) by 2021. ♦



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# Pet trends that are good for business

**Pet humanisation is not a new trend, and it is here to stay. US pet industry economics are staggering, and humanisation is one of the best development opportunities around.**

## **From baskets to beds**

According to the American Pet Products Association (APPA) National Pet Owners Survey, as pets have moved from their baskets to their owner's bed, total pet industry expenditure has increased to over \$72 billion (€63 billion), up from \$56 billion (€49 billion) in just five years. Owners' pet purchase preferences are running increasingly parallel with their personal choices of products and services, and they are integrating their pets into more and more areas of their lives.

## **Insurance benefits**

As humans focus more attention on their own physical well-being, APPA cites steady upward trends in pet wellness practices and preventive care, with over fourteen million dogs and cats having health

insurance. In addition to pet-specific insurance providers, pet insurance is offered by top insurance companies such as Progressive and Nationwide, with pet wellness and 'nose to tail' accident and illness insurance. Many do, however, exclude pre-existing conditions, plus preventive, elective and cosmetic procedures. Pet insurance is now the hottest employee benefit, says Fortune magazine, with nearly one in three Fortune 500 companies offering it to employees.

## **Pet-friendly employers**

Pet ownership has undergone an important shift. Millennials are now the largest segment of owners at 35%, representing a greater proportion than baby boomers. To cater to this demographic and to attract millennial talent, employers are increasingly





providing pet-friendly workplaces. Currently, 9.3 million pet owners say their workplace allows pets, with 18% of millennial pet owners reporting pet-friendly work environments. Employers do this in different ways, using creative solutions to bridge the divide between employees who feel stress relief and those who feel stressed out by having pets in the workplace. Some offer on-site pet daycare, allow pets in their owners' offices or provide pet-prohibited spaces for general meetings, while others subsidise off-site daycare.

### On the road

More and more Americans are incorporating their pets into their travel plans, for a day or longer. APPA's survey reports upward trends over the last decade with 19-37% more dog owners and 5% more cat owners travelling with their pets in the car. Hospitality services are reaping the benefits, with over 17 million dog owners staying in a pet-friendly hotel and 11% going to a pet-friendly restaurant.

### Birthday gifts

Pet owners spare no expense on gifts for their companions, with more than 60% doing so according to the APPA report. Millennial dog and cat owners spend on average over \$20 (€17) per gift. 74% of small animal owners, 69% of bird owners and 62% of horse owners also buy gifts for their animal friends.

APPA's survey reports 10% of US pet owners saying that they spend more money than ever on their pet in the current economy – and that is good for business. ♦



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# Global Pet Expo gearing up to be The One Show To Attend in 2019!

Nearly 7,000 buyers from 80 countries are expected at the 2019 Global Pet Expo from 20-22 March in Orlando, Florida.

## What is on offer?

As the first industry trade show of 2019, this premier industry event is an amazing opportunity for buyers and media to see the latest, most innovative products before they hit store shelves. Global Pet Expo is the perfect introduction to the US market for those looking to enter the pet industry. The show offers many valuable tools to attendees. One of these is a seminar on US market trends which explores the pet population, consumer shopping patterns, market drivers and high-growth segments within the pet industry. Global Pet Expo also hosts a retail market bus tour, featuring stops at three to four retail outlets and designed to help participants become acquainted with in-store merchandising strategies.

## Finding your way around

Special sections help attendees to navigate the show floor more easily. These include Boutique, Natural Pet, Everything Aquatic and What's New! As international participation continues to grow, the show will once again feature country-specific pavilions, providing participating country delegations with their own dedicated space on the exhibit floor.

## The hottest and the best

The New Products Showcase is a popular spot where many US companies display their hottest products. Companies from around the world have the opportunity to see products that will hit shelves for the first time in 2019 well before their competitors. The 4,200 sqm showcase highlights over 1,000 product entries, making it the largest new products showcase at any of the world's pet industry trade



shows. On Thursday 21 March, the Best in Show winners will be announced at the Ninth Annual New Products Showcase Awards.

## Learning and networking

In addition to US market access opportunities, attendees will not want to miss the outstanding educational seminars offered by the Global Pet Expo Academy. Managed by the Pet Industry Distributors Association, the line-up features engaging speakers offering retailer education on a variety of trending topics as well as mini sessions throughout the show floor.

With consistent worldwide attendance, Global Pet Expo exhibitors are accustomed to networking with an international audience seeking the most innovative products, largely from US-based companies. There is no better place to experience the power of the pet industry than at Global Pet Expo. ♦



**Andy Darmohraj**  
APPA Executive Vice President & COO  
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San Francisco, CA

# The North American pet market – looking back and looking forward

2018 was another strong year of growth for the retail pet market in North America. Convenience, personalisation and experience are the themes for 2019.

### Impressive increases

Euromonitor forecasts for the US and Canadian markets end 2018 were up 4-5%, with the smaller Mexican market up over 8%. Impressive growth for North America but, more importantly, a year of significant change for all aspects of pet retail, with a focus on making pet ownership easier and more rewarding.

### Could do better

Petco and PetSmart, the world's largest pet speciality retailers, appointed new CEOs in June – a clear sign that they were not achieving their expected results. Both companies appear to be losing market share as they struggle to balance a 'big-box' strategy with a rapid shift to the convenience of online fulfilment. PetSmart is testing 'The Groomery', a high-end services-driven concept, while Petco is testing a 'Just food for dogs' store-within-a-store concept, plus a 'Pet-Coach' store focused on services.



### Online gaining pace

Chewy and Amazon seem to be rapidly gaining market share with very different strategies. The pet expert Chewy offers best prices, widest assortments, great customer service, and the convenience of a free delivery and subscription programme. Amazon is leveraging their vast prime membership database to target food shoppers that buy pet food and accessories. Both companies are gaining market share, with 2018 forecasts of 16-17% of pet food and accessory purchases online.

### Keeping your share of the market

Despite the online retail offensive, the independent pet channel appears to be maintaining market share with exclusive brands, improved in-store experience and local brand appeal. Independent Pet Partners has consolidated its neighbourhood market with six acquisitions in a year.

For the past decade, grocery and mass retailers have 'donated' market share to the pet speciality segment because they could not access super premium and natural food brands. With Blue Buffalo and Nutro broadening their distribution to high traffic retailers, grocery and mass may hold on to their share of the pet food market.

Private brands were responsible for much of the growth in 2018. In the offline speciality segment, private brand pet food grew by over 15%, increasing its market share and customer loyalty. Both Chewy and Amazon continue to expand their stable of private brand pet foods, with many launches exceeding expectations.

### Opportunities going forward

Euromonitor is forecasting another 4-5% growth in the North American pet market in 2019. As millennials take over and Gen Z begins to impact pet ownership, three themes emerge:

- Demand for Convenience: immediacy, location, ease of use and peace of mind.
- Desire for Personalisation: relevance, resonance and products just for you.
- Focus on Experience: engagement and social networking.

Overall, 2018 was a year of disruptive change in North America with strong growth. 2019 is expected to continue along the same trajectory, creating significant opportunities for forward-thinking retailers. ♦



**Dave Bolen**

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# New channels and humanisation dictate Canadian petcare industry



**Petcare stands out as a dynamic industry in Canada as pet ownership, particularly of dogs and cats, consistently grows.**

## Three big changes

Canada's petcare industry is the twelfth largest globally and in the last five years it grew an impressive 21% in retail sales. This was more than twice the rate of most other Canadian consumer packaged goods (CPG) industries, with continued growth on the horizon.

Despite this growth, major trends are disrupting the industry and have the potential to transform petcare in Canada. Three trends, in particular, should be watched closely in 2019.

## Wanting only the best

Humanisation and premiumisation will continue to shape the Canadian petcare market and these trends are expected to intensify. Consumers now

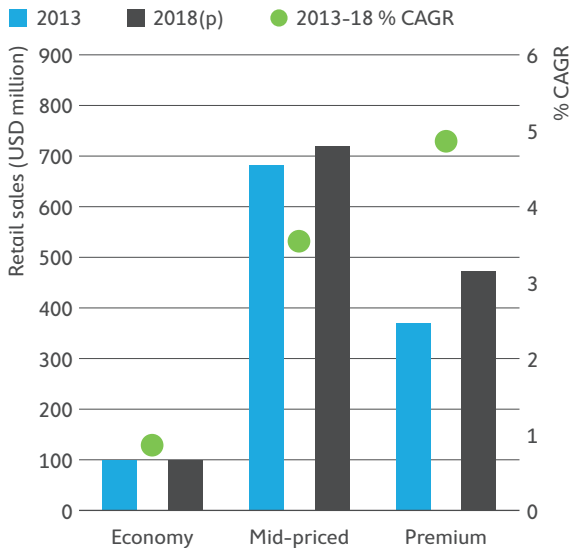
view their pets more as companions and family members, bolstering demand for premium products traditionally geared toward humans. Food products touting alternative proteins, natural qualities and special dietary attributes are expected to continue to steal market share from economy brands.

Accessories and even dietary supplements for pets are projected to achieve strong growth, along with smart technology products. More and more pet owners are purchasing GPS and activity trackers, health monitors, and food and treat dispensers.

## Channel identities redefined

The rise of speciality foods and the demand for premium offerings could indirectly impact channel distribution. Traditionally, the industry has been

## Canada: dog and cat food by price tier



Source: Euromonitor International  
CAGR = Compound annual growth rate

largely segmented into two distribution groups with distinct brand offerings. Mass channels – which include supermarkets – warehouse clubs and other mass merchandisers have largely been geared toward selling economy and mid-priced brands that offer basic nutritional attributes. Conversely, speciality channels such as pet shops and veterinary clinics have prioritised premium brands and therapeutic brands.

Channel identity has historically been vital to the industry, with many consumers associating speciality channels with quality. As demand for premium items has soared, so has the speciality channel, which grew by 9% in 2018. But as consumers continue to look for speciality products while shopping across channels, the likelihood of disruption to the traditional divide between these channels grows. This could cause speciality brands to proliferate in mass channels and vice versa.

In the US, this traditional divide is already less distinct. Mass channels are now seeing a slight increase in growth, as a result of strong sales for

premium items that were previously reserved for speciality channels. It is a trend that could well be an indication for the future for Canada too.

### Explosive growth of e-commerce

Transformations within petcare are most powerfully seen in the rapid ascendance of e-commerce. As connectivity grows, and millennials in particular prioritise convenience, e-commerce has seen explosive growth across many CPG industries. While still premature in many food categories, petcare internet retailing in Canada has surged, growing 277% since 2013 to account for 2.6% of all petcare sales. Much of this growth can be attributed to online giants like Amazon expanding in Canada, as well as popular delivery subscription services providing the ultimate convenience.

However, brick-and-mortar stores are also incorporating e-commerce delivery and popular in-store pickup options. As more retailers make these options available, and more consumers shop online, petcare represents one of the ripest industries for e-commerce to mature in 2019.

### Detailed report

Despite strong projected growth in the industry in the immediate future, these three trends will create upheavals as they shift and change traditional dynamics. A report on petcare in Canada on the Euromonitor website gives more details on how changing purchasing behaviour and new technology are likely to cause continued disruption in the growing Canadian petcare market throughout 2019. ♦



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# Pet Supplies Sourcing Platform for Boundless Opportunities



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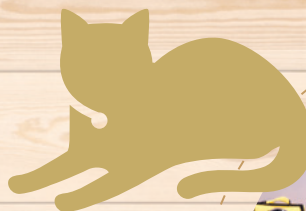


## The Booming Pet Supplies Market

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## Calendar of events



### PATS Sandown

10 - 11 February 2019

Sandown Park, Esher, United Kingdom

[patshow.co.uk](http://patshow.co.uk)



### Pets & Money

28 February 2019

Millennium Gloucester Hotel, London  
United Kingdom

[patsandmoneysummit.eu.com](http://patsandmoneysummit.eu.com)



### China Pet Expo

14 to 17 March 2019

China International Exhibition Center  
Beijing, China

[cpse-expo.com/en](http://cpse-expo.com/en)



### Global Pet Expo

20 to 22 March 2019

Orange County Convention Center  
Orlando, FL, United States

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



### Iberzoo+Propet

21 to 23 March 2019

IFEMA-Feria de Madrid, Madrid, Spain

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



### Interpets

28 to 31 March 2019

Tokyo Big Sight, East hall 2, 3, 7, 8  
Tokyo, Japan

[interpets.jp](http://interpets.jp)



### ExpoZooUA & AquaTerra Show

5 to 7 April 2019

International Exhibition Center  
Kyiv, Ukraine

[expozoo.com.ua](http://expozoo.com.ua)



### PetExpo

12 to 14 April 2019

Romexpo  
Bucharest, Romania

[petexpo.ro](http://petexpo.ro)

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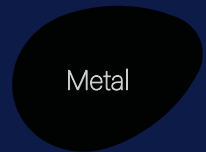
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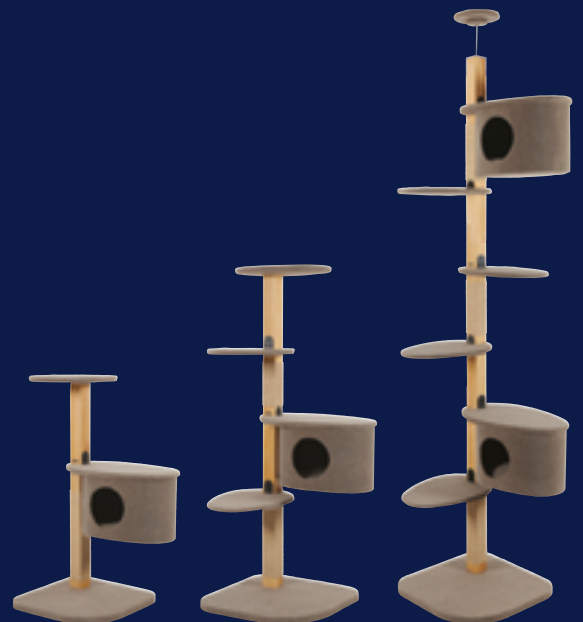
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