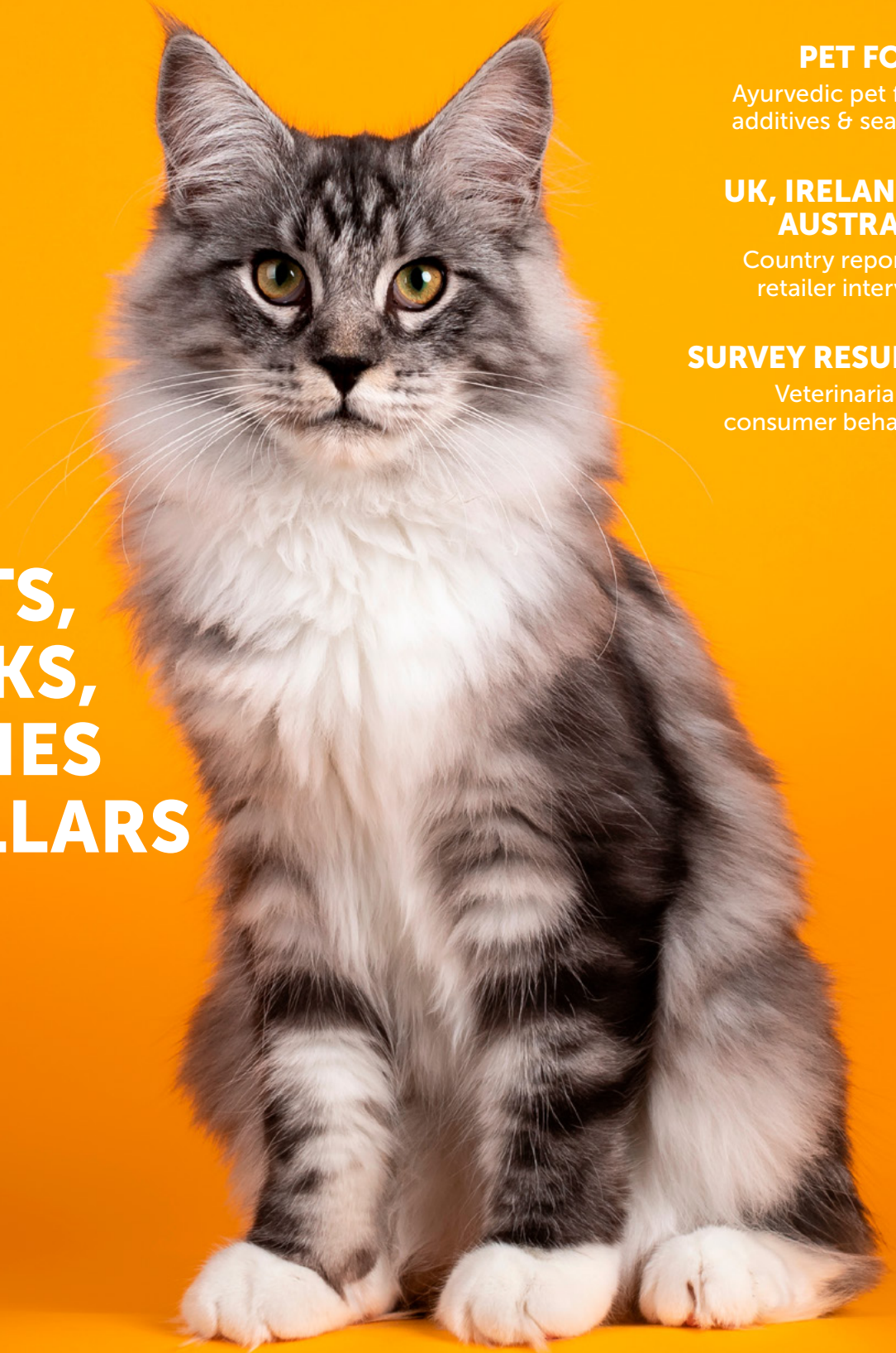




PETS International

THE GO-TO PUBLICATION FOR PET INDUSTRY PROFESSIONALS SINCE 1988

APR 2023



TREND REPORTS

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SNACKS,
LEASHES
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PET FOOD

Ayurvedic pet food,
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UK, IRELAND & AUSTRALIA

Country reports &
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SURVEY RESULTS

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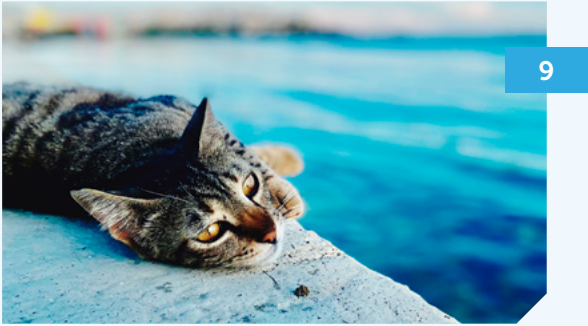
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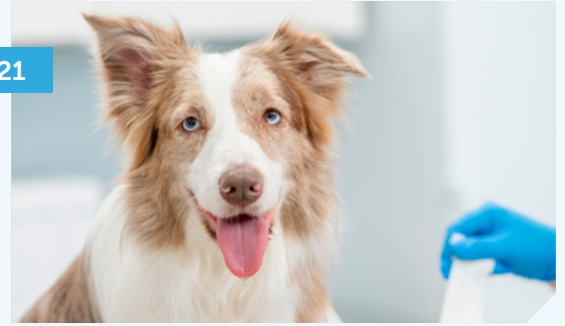


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Food and ingredients

Dog and cat treats reached \$11.3 billion in sales in the US last year. How are they used to tackle pet obesity? Ayurveda is generating interest among pet industry players, especially in India. The use of shellfish in pet food formulation is also on the rise.



Global pet industry

What's the opinion of pet parents about their vets and how much do they spend on vet services? You'll learn how retailers approach customers in rural areas. Dog accessories and biometric wearables are gaining popularity; how's the market looking?



UK, Ireland and Australia

Pet parents are purchasing more online but continue visiting physical pet stores. Where is the industry heading in the UK, Ireland and Australia? The leader of Sydney-based online pet retailer Pet Circle shares his thoughts about the market opportunities Down Under.



Impact of inflation

What does the latest research say about the impact of inflation on pet consumers? And what is being done to alleviate the pressure? [Page 39](#)



Pet care survey results

We partnered with Yummypets to ask pet owners how they feel about their vets, how often they take their pet there, the type of services they expect and more. [Page 22](#)



GlobalPETS Forum 2023

242 pet industry leaders from across the world gathered in Berlin, looking for inspiration on how to keep pet parents attached to their brands. [Page 34](#)

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New event season

The year got off to a great start with a successful GlobalPETS Forum: 242 pet industry leaders from 153 companies and 32 countries came together in Berlin. There were lots of networking opportunities and inspiring speeches. And we announced the winner of the 2023 GlobalPETS Forum Award (find out who won on page 37). After some tremendous feedback, we're looking forward to the next edition in Venice.

Another early-in-the-year event was Global Pet Expo in Orlando. It was our first time exhibiting there, and it was great to interact face-to-face with so many of our American readers.

Now, let's zoom into this issue of PETS International and what you can expect ...

In the regional deep dive, you'll read about pet industries in the UK, Ireland and Australia. Including an analysis of the regulatory environment affecting our industry. We also sit down for an interview with the CEO of one of Australia's largest retailers, Pet Circle.

You already read our predictions for 2023 trends in the February issue. Now you'll discover the upcoming trends in treats and snacks, and leashes, collars and harnesses. You'll also find out whether ayurvedic pet food is the next 'big thing' to watch.

As pet care and the veterinary sector are extremely important, we partnered with Yummypets to ask pet parents how they feel about their vets. The survey findings also tell us more about how owners choose and consult a veterinarian. We further examine telemedicine for pets and the impact of inflation on veterinary practice.

On the retail side, we look at the current state of 'autoshipping'. Plus the strategies pet retailers are pursuing in Europe and the US to cater to their more remote customer bases.

If you'd like to share what you think of the magazine, and any topics you would like us to cover, please reach out to our editorial team at content@pets.nl.

Happy reading and look forward to your feedback,

Philippe Vanderhoydonck
Managing Director

P.S. If you don't receive our newsletters yet, go to globalpetindustry.com and sign up to keep a finger on the pulse of the industry.



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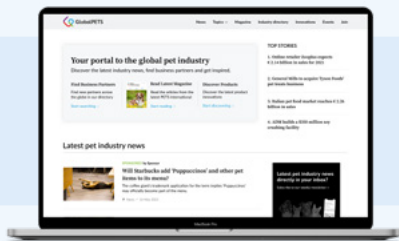
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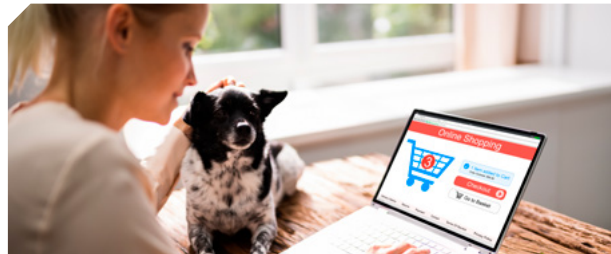
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Fressnapf hit €3.5 / \$3.7 billion in sales in 2022

Fressnapf's revenue increased by 11% last year, with a good performance in each of the 13 markets where the company operates. Online sales accounted for €329 million (\$354.2M) in 2022, 34% more than the previous year.

Poland (+53%) and France (+25%) registered the most significant revenue increases. Fressnapf also say that sales increased in Ireland by about 43%, after the takeover of local pet retailer Equipet in 2021.

This year, the company plans to invest more than €100 million (\$107.6M) in the development of its omnichannel ecosystem. The German pet retailer opened 130 new locations in Europe in 2022, and intends to "increasingly grow internationally" through joint ventures and cooperating with other firms. Earlier in 2022, Fressnapf said it aimed to open 400 new stores in Europe by 2025.



American pet parents spent roughly \$2,000 / €1,900 last year

A survey by insurance comparison platform Insuranks revealed that half of US pet owners spent more on their pets in 2022 than in previous years. The research concludes that pet parents in the US typically spend \$110 (€103) a month on essentials. This includes pet food (for 100% of respondents), followed by toys (87%), litter (57%), enrichment activities (49%), and vitamins/supplements (46%). Half of the respondents say that the highest expenses are vet visits.

With inflation on the rise, pet owners expect to spend more in 2023, with 49% saying they had already spent more than usual on their pets in 2022.

Pet food brand Edgard & Cooper raises €20 / \$21 million

The founders of Edgard & Cooper have stated that the recent capital injection will allow the company to boost product innovation and increase its European footprint. The Belgian manufacturer will be using the investment to create awareness of its products among even more cat and dog owners locally and internationally. It will also further roll out its Zero Pawprint 2025 plan – to be carbon neutral by that year, among other things.

London-headquartered venture capitalist The Craftory led the investment round, with participation from consumer-focused investment company DLF Venture. In 2020, the Kortrijk-based company raised \$22 million (€20M) from DLF Venture and The Craftory.

flexi celebrates its 50th anniversary

Manfred Bogdahn created a retractable lead for his dog Purzel in 1972. This prototype led to the foundation of the company. Although he started selling the leads in April 1973, the real breakthrough came during the 1974 edition of Interzoo.

Word spread quickly and the leads became incredibly popular. Today, more than 350 employees work for the flexi brand. They produce tens of thousands of retractable dog leads a day, which are then exported to over 90 countries.



Paramount acquires food and retail brands from Paws Group

The UK firm Paramount has strengthened its presence in the pet industry by taking over 4 online retail brands: Fetch, Medic Animal, Pet Supermarket, and Pet Meds. The acquisition also includes pet food brands Bob & Lush and K9 Choice. Together, these brands generated sales of more than £50 million (\$60M / €56M) in 2021.

The firm's portfolio includes Pet Brands – a manufacturing line of accessories and treats for pets and wild birds. Pet Brands exports to 58 countries globally and produces its own labels and licensed brands. Paramount also owns pet products wholesaler Vital Pet Group. The group has an aggressive expansion plan to reach £200 million (£240M / €225M) in revenue over the next 24 months.



Is the end of 'designer pets' near in the Netherlands?

The Dutch government is drafting a law prohibiting pets with traits such as flat faces and folded ears, claiming they have a 'painful' life.

The Minister of Agriculture, Nature and Food Quality will be proposing a bill to ban the ownership of breeds with a higher risk of impairing animal welfare, such as flat-faced dogs and cats with genetic mutations. The proposal also applies to publishing photos or marketing these animals on social media and other public platforms.



There is no time frame as yet for the proposal to reach the Dutch parliament. According to the ministry, the bill will apply to new pets and not to people who already own pets with these traits.

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Purina buys pet treats factory from Red Collar

The Red Collar Pet Foods plant was “carefully selected” by Purina, based on its current and future soft and meaty pet treat manufacturing abilities and the “shared commitment to quality and safety”.

The acquisition will further develop the pet food producer’s in-house capacity for pet treat innovation and production. This addition to its portfolio will be the 22nd Purina-owned and operated facility in the US.

Purina has collaborated with Red Collar since 2022, co-producing a number of soft chew pet treats under the Nestlé treats portfolio and Zuke’s brands.



Eldorado A/S: 60 years old and still going strong

The Danish family-owned distributor of pet products has grown by leaps and bounds since its inception in 1963. The company was created after the family had set up a pet store in 1963, and went on to make a name for itself in Denmark. In 2008, Eldorado was passed on to the next generation, and it expanded in 2017, opening an office in Norway.

CEO Per Lausen said in a statement to Pets International that he was humbled and proud to have reached the 6-decade milestone. “As the second-generation owners of the company, my sister and I hope to continue to grow and expand the business.”

Brazilian manufacturer invests \$1.6 / €1.5 million in new distribution center

Special Dog Company has opened a new distribution center in Minas Gerais, after seeing the demand for pet food increase in the past 2 years in Southern Brazil. This 7,000 sqm facility will help dispatch between 500 and 600 tons of products per week. The company aims to make its products available to more than 40,000 outlets.

Brazil has the world’s third-largest population of companion animals, with more than 149.6 million pets – according to Instituto Pet Brasil. It is estimated that the market will grow by 15% in 2022. Special Dog Company posted sales of R\$1.93 billion (\$386M / €353M) in 2022, a 28% jump from the previous year.



New heads of Merchandising and Product teams at Zooplus

The Munich-headquartered company Zooplus has appointed Alejandro Bethlen as Chief Merchandising Officer and Jim Cruickshank as Chief Product Officer. Bethlen and Cruickshank have also been appointed to the pet e-commerce platform’s executive committee.

Alejandro Bethlen will oversee the development of Zooplus’ brand portfolio, supplier relations and sourcing. His role covers international accounts, local champion brands and own brands across food, accessories and services.

Jim Cruickshank will lead the company’s product portfolio and seek to transform its customer platforms. He will also build on Zooplus’ user experience, and develop products and interfaces with a customer-centric focus.

Geoffroy Lefebvre, CEO of Zooplus, said the appointments will accelerate the company’s growth and strengthen its position as the “leading pet e-commerce platform” in Europe.





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50
YEARS

A large, golden, stylized graphic of the number "50" followed by the word "YEARS" in a smaller, golden, sans-serif font. The number "0" is a simple circle, and the number "5" is a thick, rounded shape. A white silhouette of a dog in mid-leap is positioned inside the right side of the "0". The entire graphic is surrounded by several small, golden, circular dots of varying sizes, scattered across the dark background.

Inventor* of the
Retractable Lead
since 1973

www.flexi.de/en

*) The first usable and mass-produced retractable lead was invented and designed by Manfred Bogdahn in 1972.
One year later he founded the brand flexi® and shipped the flexi lead worldwide.



Voff appoints new CEO and acquires Dutch raw pet food producer Energique

The Swedish pet food platform company continues its acquisition spree and enters the Dutch pet market.

Since 2014, Voff has built out a portfolio of 10 main brands in Germany, the UK, the Netherlands and the Nordics, with annual sales of approximately SEK 1.1 billion (€97M / \$104M) and more than 300 employees. Its goal is to become the leading consolidator of natural pet food companies in the European market.

Anders Kristiansen has succeeded Mårten Bernow as CEO, who held the position since 2019 and who has decided to step down.



Taiwan's pet food exports jump 377% in 6 years

The Taiwan Council of Agriculture has reported that the country exported 1,922 short tons of pet food in 2022, a 44% increase compared to 2021. The Asian nation has gained market share in neighboring countries.

According to the Taipei Times, citing official figures, pet food exports accounted for \$17.66 million (€16.2M) in 2022. In 2021, exports were worth \$12.2 million (€11.5M).

Chiang Wen-chuan, Deputy Director of the Department of Animal Industry, told local media that the country primarily relied on pet food imports and the industry is now "becoming a focus for domestic producers".

CBD can address loneliness and motion sickness in dogs, study reveals

New research from Waltham Petcare Science Institute, Mars Petcare's science hub in the UK, reveals that cannabidiol (CBD) is efficient in lowering stress in canines. A single oral dosage (4 mg per kg of body weight) of THC-free CBD is said to alleviate anxiety in dogs which is triggered by car travel or being left alone.

Waltham conducted a blind, randomized, placebo-controlled test that observed how CBD affected the lives of 20 dogs in everyday situations which are likely to produce stress, such as traveling in a car or being home by themselves.

Canines administered with CBD were seen to be substantially less stressed, had considerably reduced cortisol levels, displayed less whining, and were more comfortable emotionally than dogs who were on a placebo.

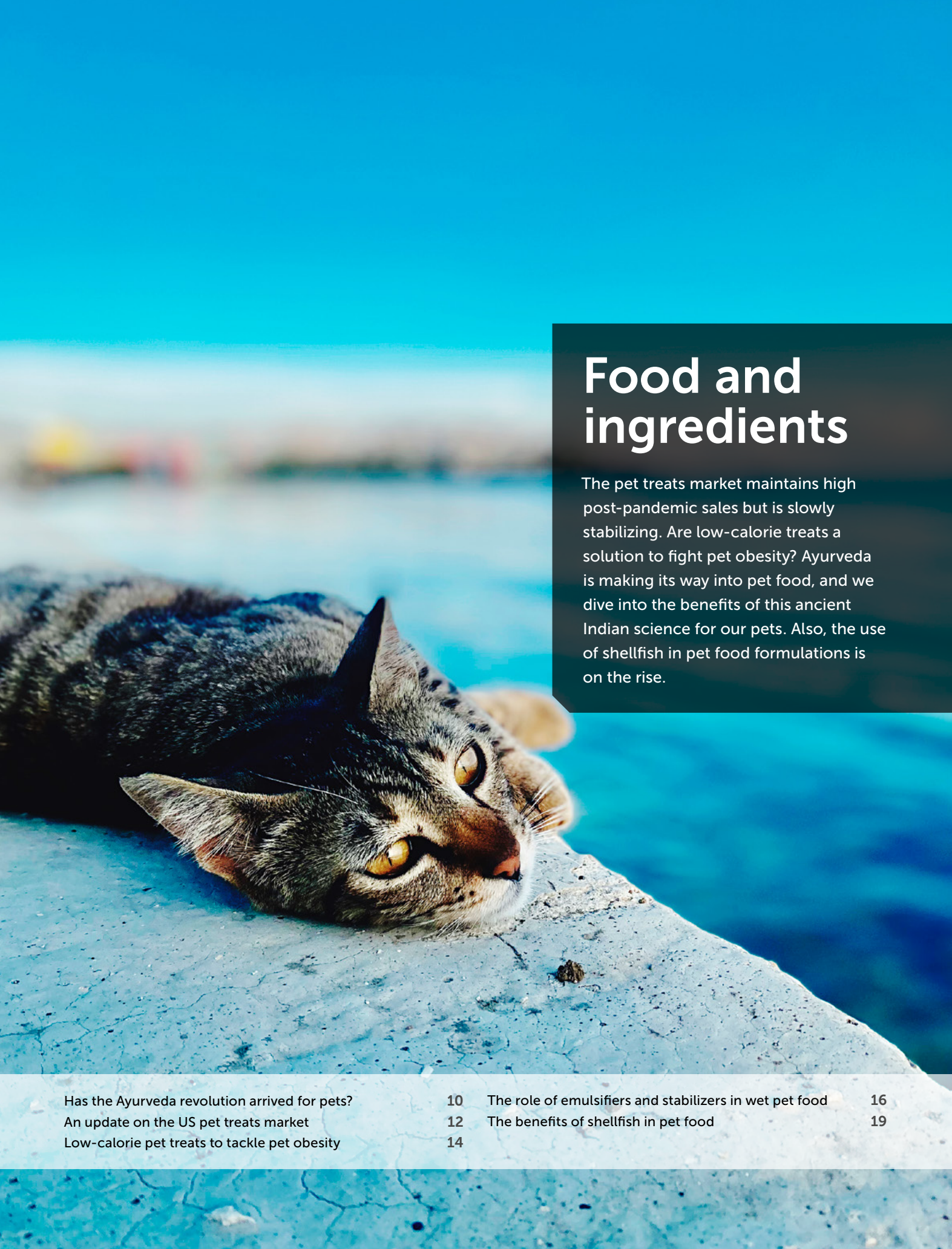


Swiss pet care brand Bogar taken over by AgroBiothers

With the Bogar takeover, AgroBiothers hopes to boost its market presence and bolster the position of pet hygiene brand Vetocanis.



The French pet care company aims to offer new expertise in hygiene and care to Bogar's customers, and to introduce new products within the next 2 years. Both firms will continue to focus on and grow their existing markets, but expect to benefit from joint synergies and product ranges from 2024 onwards.



Food and ingredients

The pet treats market maintains high post-pandemic sales but is slowly stabilizing. Are low-calorie treats a solution to fight pet obesity? Ayurveda is making its way into pet food, and we dive into the benefits of this ancient Indian science for our pets. Also, the use of shellfish in pet food formulations is on the rise.

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Has the Ayurveda revolution arrived for pets?

As consumers are embracing alternative medicines, the ancient Indian science of Ayurveda is increasingly regarded as a natural and health-bringing solution for pets.

The Academy of Integrative Health & Medicine declared 2022 as the 'Year of Integrative Health and Wellness'. Defining a system in which traditional and alternative therapies are blended, the organization predicts a greater mainstream acceptance of this holistic approach.

Good for us, good for them

At the same time, in our post-pandemic world, pet parents have become more conscious of their health and well-being, and alternatives to mainstream medications. It's a mindset that they also project on their pets. Increasingly, owners have adopted an 'if it's good for us, it's good for them'-approach to their four-legged friends' health.

An alternative approach to pet food?

Not surprisingly, therefore, interest in Ayurveda – perhaps the oldest and most popular form of alternative medicine dating back to 2000 to 4000 BC in India – is on the rise.

Traditionally focused on animal health and well-being, physicians in ancient texts described treatment for both humans and animals. The region's first recorded veterinary hospital – opened in 1463 BC – used Ayurvedic botanicals.

But the Ayurvedic pet care market is still in its infancy, with very limited research and data available. It's also heavily concentrated in India: Market Research Future (MRF) estimates that India accounts for 80% of the total sales.

However, Prabhu Gandhikumar, co-founder of Ayurvedic pet food start-up TABPS Pets, believes the potential market is global. "With pets suffering from so many allergies – due to chicken and other grains grown with the use of pesticides and chemical fertilizers – Ayurvedic-powered pet food can do wonders to the overall health of pets worldwide."

According to MRF, consumer interest has increased over the past years. This was largely due to the fact that it was considered a preferred option to boost immunity against COVID-19. MRF expects the global Ayurvedic market to expand at an annual rate of 15%, reaching \$23.8 billion (€22.14B) in 2030.

Healthy but expensive

Patrick Holmboe, an Amsterdam, Netherlands-based vet, lists 3 advantages of adding Ayurveda to pet food: natural ingredients, chemical-free, and overall wellness. While individual animals respond differently to specific food types, he notes that Ayurvedic food can potentially improve digestion and boost immunity.

This is due to ingredients like herbs and pastes that have anti-inflammatory, antioxidant and immune-boosting properties. Moreover, products like TABPS Pets' dog biscuits are said to improve neurological functioning, and enhance an animal's skin and hair texture.

So, what about the price? Gandhikumar points out that Ayurvedic pet products are relatively expensive

at this point, due to the lack of scale: “Until you get to industry-level farming of these herbs, you wouldn’t be able to bring down the costs.”

Currently, Ayurvedic herbs are mostly used for medicine in very small quantities, so the cost is higher. “But when you start looking at the pet food category, you require tons of material to make a significant difference,” he explains. “It becomes a challenge in both procuring and processing these at scale.”

Increasing interest from investors

The popularization of Ayurvedic ingredients in pets’ diets is evident in the interest of investors in start-ups in this sector. Last year, Ayurvedic consumer goods giant Emami Group acquired a 30% stake in pet care brand Cannis Lupus. This company’s subsidiary Fur Ball Story makes Ayurvedic pet food and health products.

In 2021, beauty and skincare brand Idam Natural Wellness acquired a majority stake in Petveda, which develops grooming products like shampoos and hair sprays for animals. Earlier in the year, Petveda closed a funding round worth \$10 million (€9.3M).

Elsewhere, as a sign of the industry’s potential outside India, Irish manufacturer Kerry Group took over US-based Natreon. This company is a supplier of Ayurvedic botanical ingredients such as Sensoril – a root and leaf extract – for certain pet supplements manufactured by Zesty Paws.

Lack of awareness?

However, the Ayurvedic pet care market also faces some obstacles. Both Holmboe and Gandhikumar believe a lack of awareness is a major hurdle. “Most people don’t know that Ayurvedic formulations have been used already for thousands of years in India to boost canine health,” according to Gandhikumar.

As mammals, humans, dogs and cats have similar digestive systems. But they each have their own Ayurvedic formulations and increments based on a species’ weight. Holmboe: “How much do you give to different sizes of dogs? When you look at a medicinal environment, we have to be very clear, so it doesn’t harm the animal.”

Ayurvedic consumer goods giant Emami Group entered the pet industry last year.

Another challenge is to overcome consumer skepticism. Many pet owners may still have doubts about alternative medicine. “This can be overcome by educating consumers about the potential benefits and safety of these products, as well as by conducting more scientific research to provide evidence of their effectiveness,” says Holmboe.

More research and standardization

Gandhikumar believes research on extending Ayurvedic ingredients’ shelf life is key: “All these herbs are heat-sensitive. Once added to an extruder with high temperatures and pressures, there’s a big chance of shortened shelf life or the health benefits being affected.” One solution is to define a production process where the Ayurvedic ingredients can be mixed with heat-stable coatings, thereby increasing shelf life.

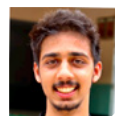
Meanwhile, a lack of regulations and standardization raises doubts – especially in the Western hemisphere – about Ayurveda’s effectiveness. In 2010, the European Union imposed a ban limiting the sale of Ayurvedic medicines, owing to a lack of adequate research on their safety and uncertainty over ingredients (many of which belong to wild species).

Bright future

Despite all this, a shift in western attitudes towards alternative medicine can be seen, with MRF’s analysis pinpointing North America as the fastest-growing region in the Ayurvedic market in 2021.

Both Gandhikumar and Holmboe agree that consumers’ renewed focus on ‘natural’ and alternative products for their – and subsequently their pets’ – well-being is key to the growth of the Ayurvedic sector.

“The future looks very bright,” concludes TABPS’s co-founder. ♦



Anay Mridul
PETS International Contributor



An update on the US pet treats market

After sales of pet treats soared during the pandemic, the market now seems to be leveling. But dog and cat treats remain popular among pet parents.

Sales of pet treats and chews benefitted from a pandemic surge, rising 20% in 2020, 18% in 2021, and 12% in 2022, to reach \$11.3 billion (€10.5B) in that year. Even with sales growth rates now tapering off somewhat, pet treat sales are projected to grow at a very robust 10% compound annual growth rate between 2021 and 2026.

Dog treats outperforming cat treats?

Broken down by products for dogs versus cats, dog treats account for the lion's share of US sales, at 80% in 2022. Even so, cat treats outperformed dog treats in sales growth in 2020 and 2022. What's more, they have even seen significant increases in usage rates over the last decade.

While MRI-Simmons reports that the usage rate for dog treats is fairly steady at 76-78% between 2012 and 2022, usage rates for cat treats jumped from 51% in 2012, to 61% in 2022.

In terms of sales, in-store accounted for 63% of dog treat sales and 66% of cat treat sales in 2022. This

amounted to 37% and 34% respectively, for online sales of traditionally bricks-and-mortar-based retailers.

However, the percentage of e-commerce sales is projected to overtake in-store sales by 2027, with 54% of dog treat sales and 49% of cat treat sales. Autoship programs continue to represent potent sales opportunities for online marketers of pet food and treats, with dry pet food (attracting 22% of dog and cat owners) and pet treats (21%) topping the recurrent subscription programs usage rate.

Growing demand for functional treats

The increased focus on pet health and wellness – the main driver of sales growth across the US pet industry – has resulted in greater interest in functional treats.

In general, pet parents have become more picky about the types of treats they purchase, favoring those with a better nutritional profile. Over four-fifths (83%) of respondents to a 2022 Packaged Facts survey of pet

owners liked the idea of healthier snacks/treats for their pets. This study also showed the following preferences:

- **dental chews/treats** attract 53% of dog owners and 25% of cat owners
- **healthier snacks/treats** attract 45% of dog owners and 38% of cat owners
- **functional pet treats** attract 25% of dog owners and 22% of cat owners.

Sales of treats and chews in the US (in billion \$)

	2019	2020	2021	2022
Dog/Cat treats	7.1	8.5	10.1	11.3
Dog treats	5.8	6.8	8	9
Cat treats	1.3	1.7	2.1	2.3

Source: Packaged Facts

The pet treats category closely follows the major trends in pet food overall. This makes sense given that many of the marketers, brands and formulations at play are the same. The most sought-after types of treats

include those boasting natural or organic ingredients, functional or limited ingredients, novel protein, and US-sourced ingredients. Dental chews and treats that serve both functional and pet pampering and entertainment needs remain popular. Interestingly, more indulgent treats mimicking the flavor profiles of human foods also remain in strong demand.

As with American shoppers at large, pet owners' top shopping priorities are product quality, product affordability, and shopping convenience. Over half of the pet owners are concerned about the ethical and humane treatment of the animals raised to use in pet food/treats (57%) and like the idea of using more sustainable alternative protein ingredients in pet food and treats (53%). These figures score even higher among millennial and Gen Z pet parents. ♦



David Sprinkle
Research Director and Publisher
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Low-calorie pet treats to tackle pet obesity



The pet treats category is on the rise – but so is the number of obese and overweight dogs and cats. This has created a need for healthier, low-calorie alternatives to traditional pet treats.

Every dog and cat has a calorie intake requirement per day, and treats should make up no more than 10% of this. Daily calorie needs vary with age, physical activity levels, medical and behavioral conditions, reproductive status, breed and growth stage.

Most owners know how to portion their pet's food by reading the label on the packaging, but they may not realize that giving additional treats on top of the base diet can lead to weight gain, especially when giving high-calorie treats like chews or jerky.

Health concerns

Pet obesity is a growing problem, with an estimated 58% of cats and 56% of dogs in the United States classified as overweight or obese. This is a serious health concern, as obesity in pets can lead to a number of serious health problems, such as diabetes, joint disease and pancreatitis, as well as behavioral issues. Often so-called 'treats' are human foods that can even

be dangerous for pets. That is why it is important to only give products that are specifically intended for animals.

Low-calorie pet treats for training

Pet treats are mostly used to strengthen the bond between an owner and their pet or for training purposes. Studies have shown that positive reinforcement causes animals to associate training with something pleasant, making them keen to learn new things. The simplest way to include rewards in animal training is by using treats.

Low-calorie treats are becoming increasingly popular for pet owners who are looking for ways to provide their furry friends delicious rewards without compromising their health. With treats that are low in fat but still nutritious and tasty, owners can give their pets even more treats without worrying about overfeeding.

Low-calorie pet treats are usually high in fiber and protein and low in fat. Fiber helps with digestion and keeps pets feeling full for longer, while protein provides essential amino acids for muscle growth and development. Low-fat treats are beneficial for pets who are overweight or prone to weight gain, as they help to limit calorie intake if given in the right amount.

Other purposes

Treats are usually associated with training and the more we can use them as a reward during training sessions, the better. Low-calorie treats are perfect for this. However, they are also used for many other purposes.

Dental treats are designed to maintain and improve the oral health of pets without affecting their daily calorie intake. They are typically designed with abrasive textures that help remove plaque and tartar build-up, and they often contain ingredients to reduce bad breath like cinnamon or vanilla.

Chew treats, though usually high in calories, can be helpful for young pets or pets with separation anxiety to distract them from boredom and destructive behavior. These types of treats take a long time to consume and therefore might not impact the pet's weight as much. The most common so-called 'natural' chew edibles for pets are rawhides, bully sticks, dried ears and roasted beef bones, but since they are poorly digestible and carry risks of constipation and choking, they are not recommended for pets.

However, safer solutions already exist, like hard chews made of starch or other vegetable ingredients, which are low in calories and pass through the gastrointestinal tract mostly unabsorbed.

Popular ingredients in dog treats

Low-calorie dog treats on the market include freeze-dried, air-dried, baked and frozen treats. The most popular and recommended ingredients in freeze-dried low-calorie dog treats include vegetables, fruits and many sources of protein like lean meat. Some of the most common ingredients include chicken, salmon, beef, carrots, apples, sweet potatoes and legumes such as chickpeas.

High-protein ingredients, like chicken, turkey and fish, are becoming increasingly popular in low-calorie treats for dogs. These ingredients provide essential amino acids that are necessary for highly active or growing dogs. They are also usually the main ingredient in low-calorie pet treats.

Health benefits

Ingredients that are high in fiber, such as cellulose, fruits or vegetables keep pets feeling full for longer and can also improve digestion.

A substance that can be added to the recipes of treats is L-carnitine. It is a naturally occurring amino acid found in muscle and organ tissue that can support the metabolism of fat and optimize muscle function.

Most low-calorie treats have a short list of ingredients and do not exceed 5 calories per treat, while traditional dog biscuits can contain up to 10 times more calories per treat.

What about cats?

Since cats are often kept indoors, they have a limited range of activities to increase their caloric intake, but this does not stop their owners from feeding them treats. Unfortunately, the will to play and be active depends on the cat's age, sex and personality, as there are cats who just do not enjoy playing or running.

The most popular ingredient in low-calorie cat treats is fish. It is high in protein and low in fat and calories, making it an ideal choice for cats who need to watch their weight. Fish also provides essential vitamins and nutrients, such as omega-3 fatty acids.

Most popular low-calorie treats for cats have a short list of ingredients with tuna, salmon or chicken as a main component. Calories vary from 1 to 2 calories per treat, compared to puree treats that contain up to 9 calories per pouch, limiting the portion to 1 or 2 per day. Because cats are not usually trained, there are fewer cat treats on the market than dog treats. ♦



Karolina Holda, PhD
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The role of emulsifiers and stabilizers in wet pet food

Emulsifiers and stabilizers come from a variety of sources and help achieve the desired consistency of wet food and other liquid products; some can even provide health benefits.

Emulsifiers and stabilizers are commonly used ingredients in liquid products. These are added in small quantities and modify the oil and water fractions of a product to reach the desired consistency and maintain it throughout the product's shelf life. Emulsifiers allow 2 liquids to blend that would not normally mix, such as oil and water. Stabilizers give structure to products by binding, holding or thickening the water fraction.

Examples in human food

These ingredients are added to wet pet food to create chunks, viscous gravy or jelly. Rummaging through my kitchen cupboard, I can also readily find some examples in human food products: corn starch for thickening and controlling the flow of tomato ketchup, xanthan gum as a stabilizer in mayonnaise and animal-derived gelatin to form the gel capsule around a supplement.

Some ingredients have multiple functions, while others have only one. In some instances, several materials must be combined for the desired effect. For example, my vegan algae oil capsules are not encapsulated with gelatin but instead use a combination of modified starch, glycerol, carrageenan and sodium carbonate. Suppliers of hydrocolloids and gelling agents have the expertise required to create the desired effect in the final product.

Gelling

Carrageenan (additive number E 407) is a gelling agent, and the gel strength and viscosity depend largely

on its type (kappa is often used). While carrageenan does not have a legal maximum quantity for pet food, cassia gum as a gelling agent (1f499) does. Therefore, it must be declared on the label in the 'additives' section, together with the level of inclusion. Further requirements of cassia gum are that it is food grade, used in complete pet food with a moisture content of over 20% and combined with carrageenan at an inclusion of at least 25% of the cassia inclusion.

Thickening

Commonly used thickening agents include plant-derived polysaccharide hydrocolloids, such as guar gum, xanthan gum and sodium alginate. These ingredients react with water, thereby affecting the texture of the finished product. They can have more potent effects in combination with other ingredients.

Emulsifiers

Some stabilizers also have emulsifying properties. Lecithin is an emulsifier that can be used in pet food. It can be derived from soy or sunflower – which is a consideration for manufacturers concerned with customer perception.

Synergistic effects

Carrageenan forms an elastic gel in the presence of potassium ions, whereas calcium and sodium lead to a harder but more brittle gel. Carrageenan gel becomes more elastic, looser and stickier when combined with xanthan gum, and it is more stable after production.

The otherwise modest sodium alginates can form heat-resistant gels when combined with calcium lactate.

Other considerations

Gelatin is used in human foods such as gelatin pudding. It is a protein-based product that denatures when heated at high temperatures, but it is suitable for cold applications. Gelatin is derived from pig bones and skin, which makes it unsuitable for kosher, vegetarian and vegan recipes. The ingredient does not, therefore, lend itself to plant-based formulation. Seaweed-derived carrageenan qualifies as a more suitable candidate in this instance, but it would require the appropriate addition of other ingredients to reach the desired functionality in either cold or hot applications.

Clean label

Starches can be used for their gelling, thickening and stabilizing properties. Rice, potato, oat and tapioca starch can sometimes be used in place of guar/xanthan gums. The functionality greatly depends on whether they have been precooked (gelatinized). Treatment with chemical, physical and/or enzymatic methods can be used to create 'modified starches', which have a more enhanced and sustained functionality throughout the lifespan of the finished product.

Apple fiber and citrus fiber have high pectin and fiber content and can provide a clean-label solution for thickening or emulsifying. Their properties depend on how the material has been treated for it to have the desired functionality, so referencing functionality with the manufacturer is recommended.

Spray-dried plasma is a feed material, as opposed to an additive, with both gelling and emulsifying characteristics. As a by-product of meat production, the high protein content of blood plasma can boost the protein content of pet food in a relatively sustainable way. Furthermore, research over the past decade has shown positive impacts on the immune system and nutrient digestibility in pets. ♦



Alexandra Wesker
Pet food nutritionist and formulator
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1. <https://globalpetindustry.com/article/pet-food-ingredients-what-do-pet-owners-actually-prefer>
2. <https://www.mdpi.com/2076-2615/13/1/144>



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The benefits of shellfish in pet food

Shellfish have long been a part of the human diet, but can they benefit our pets as well? A closer look at the increasing popularity of shellfish in the pet food industry.

As pet owners become more selective about the ingredients in their companion's diet, shellfish use in pet food has seen a rise in popularity in recent years. This is due to increasing awareness of the environmental impact of traditional protein sources and the need for more nutrient-dense options. As a result, shellfish such as mussels are becoming a popular alternative for pet food.

What are shellfish?

'Shellfish' is an informal, everyday term used for marine species of mollusks, crustaceans and echinoderms (e.g. starfish, sea urchins, et cetera). Although they are known as common food allergens, these species have long been a part of the human diet. However, only recently have they been recognized by the pet food industry.

Benefits of shellfish

Eating shellfish has numerous known benefits. It is an excellent source of lean protein, vitamin B12, omega-3 polyunsaturated fatty acids (PUFAs) and abundant minerals like zinc and iron, to name a few.

Vitamin B12 (cobalamin) is essential in red blood cell formation, cell metabolism, nerve function and DNA production. Omega-3 PUFAs have anti-inflammatory effects and therefore can help improve heart health and decrease the risks of heart disease, neurodegenerative diseases, cancer, diabetes and depression.

Additionally, PUFAs are very important for neurological development and child and maternal health. Zinc is a trace mineral with an important role in activating immune cells, while iron is essential for multiple metabolic functions and oxygen transport in the blood.

Since most shellfish are low on the seafood chain and mainly feed on plankton species, there is little concern regarding high mercury levels.

Studies on health effects

Over the last few decades, more than 100 studies on the health effects of the New Zealand green-lipped or Greenshell™ mussel (*Perna canaliculus*) have been published.

[▶ SEE NEXT PAGE](#)



Only recently have these marine species been recognized by pet food manufacturers.

In addition, research on horses has shown that using green-lipped mussel extract can decrease the severity of lameness and joint pain and improve joint flexion in limbs affected by osteoarthritis.

Sustainability of shellfish farming

Another advantage of shellfish is their farming, which is relatively sustainable. Mussels, mollusks and many crustaceans are filter feeders, meaning they filter water to obtain food, thus reducing the need for additional feed inputs.

This mussel is a rich source of bioactive compounds, particularly lipids, mainly derived from marine microalgae, which the mussels filter feed on. These include essential fatty acids such as eicosapentaenoic acid (EPA) and docosahexaenoic acid (DHA), which are thought to have anti-inflammatory effects.

Furthermore, this mussel contains furan fatty acids, sphingolipids, phytosterols, diacylglycerols, diterpenes, sesquiterpenes, saponins and antioxidants such as carotenoids, xanthophylls and anthocyanins, which all potentially benefit human and animal health.

Mussel extract in pets' diets

Glucosamine and chondroitin, 2 natural compounds found in high concentrations in green-lipped mussels, are the main reasons this mussel extract was studied for its potential benefits on animal joint health.

To assess its efficacy, alone or combined with other supplements, 10 trials were conducted in dogs, cats and horses. These studies have demonstrated that incorporating mussel extract into the diets of cats and dogs has reduced symptoms associated with osteoarthritis.

For example, a randomized, double-blinded, placebo-controlled 6-week trial on 31 dogs with naturally occurring degenerative joint disease found that adding 0.3% green-lipped mussel extract to a test diet could help alleviate arthritis symptoms.

Mussel farming is a relatively low-impact form of aquaculture; it does not require antibiotics, pesticides or growth hormones, the greenhouse gas emissions during their production are negligible and the main by-product, empty mussel shells, can help fight climate change by trapping carbon. Conversely, crustacean farming may involve administering high levels of antibiotics and emitting more greenhouse gases, thus having a greater impact on the environment.

So, the sustainability of shellfish farming can vary depending on the species, location and methods used. Even some mussel farms use methods that can damage the ecosystem, such as dredging or the use of chemicals. Some may source animals from wild populations, leading to overfishing and depletion of natural resources.

Certifications

However, some certifications ensure that shellfish are farmed using environmentally friendly methods. As pet owners become more conscious of the environmental impact of their pets' diets, they can make informed choices that support both their companion's health and the health of the planet. ♦



Jelena Šuran, DVM, PhD
CEO
ApiotiX Technologies



Global pet industry

Most pet owners have consulted a vet in the last 12 months. Our survey reveals more about how pet parents feel about their vet. How do pet retailers convince non-urban pet parents to become loyal customers? Biometric wearables are increasing their market share, but the reliability of the data collected is still in question. Plus, the main highlights of the GlobalPETS Forum in Berlin.

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Survey shows high level of trust in veterinary care



A vet can play an important part in a pet owner's life. And over the years, veterinary care has become more than just medical advice. We partnered with Yummypets to find out how pet parents feel about their vets.

Are pet owners ready for online consultations? How much trust do they put in their vet and do they use insurance to cover the costs? In what way do veterinarians influence decisions about which products to buy, and to what extent do owners take their vet's advice?

A total of 1,412 pet parents (51% dog owners and 49% cat owners) from the UK, Canada, France and the US responded to these and other questions in our survey.

Going to the vet

Most dog and cat owners (75%) have consulted a vet within the last 12 months. More pet parents in France have consulted a veterinarian compared to other countries, with dog owners more likely to do so than cat owners (80% versus 70%).

On average, nearly half of the pet owners consult their vet 2-5 times a year, especially Canadians and people in the 25-34 age group. Many pet parents (38%) go once a year, with only 6% visiting their vet more than 5 times a year.

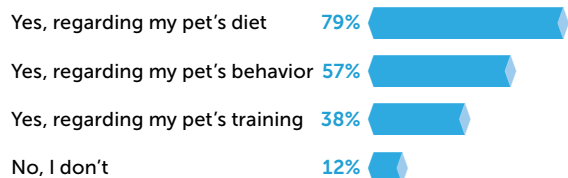
How to choose one?

Proximity is the main consideration for pet owners when choosing their vet (46%), followed by a friend's recommendation (27%) and online reviews (12%). Younger generations, such as 25-34 year-olds, are more likely to base their selection on online reviews (25%) compared to those aged 45+ (7% or less).

Making an appointment

Most people (86%) like to phone for an appointment to see a vet, with only 10% using their vet's website. Americans are slightly more likely to book an appointment via a website, while French pet owners are the least likely to do this.

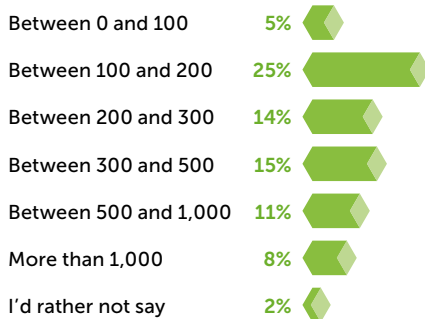
Do you expect your vet to give you advice?



Pet health insurance

Only 28% of pet owners have pet health insurance, with men more likely to take out insurance than women. French and US pet owners are the least likely to have insurance, compared to people in other countries. UK pet parents are slightly more likely to cover some of their costs with insurance.

What is your yearly budget for veterinary care? (€)

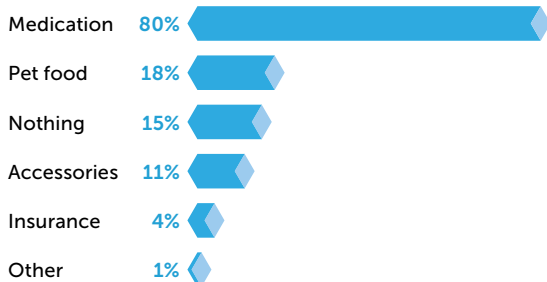


Worth the money

While 76% of pet owners find veterinary care too expensive, they do believe that their vet dedicates enough time to the consultation (90%) and provides them with enough information before administering treatment or proposing surgery (91%). When rating their trust in the veterinarian, 35% even give their vet the highest possible rating.

Despite the high level of trust in the veterinary care provided by their vet, only 36% of pet owners say they will trust a product more when it's been created by a vet. 44% do trust vet-created products slightly more. This is not the most important factor when buying a new product, but is taken into account. 20% of pet parents say it doesn't influence their trust in the product at all.

What do you buy from your vet?



**Most dog and cat owners (75%)
have consulted a vet
within the last 12 months.**

Food and dietary recommendations

Some pet owners (28%) buy the food their vet recommends, but more than half of them don't get pet food recommendations from their vet. Another 28% of them do get advice, but end up feeding their pet something else. UK vets are the least likely to recommend food. 18% of owners end up buying their pet's food at the vet, with Canadians the most likely to do so. Cat owners are the least likely to buy anything through their vet at all.

Personalized food plan

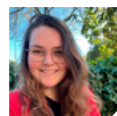
Almost half of all owners (45%) would be interested in receiving a personalized food plan for their pet as a veterinary service. Some already get a plan from their vet. 41% of pet parents – 65+ year-olds in particular – wouldn't be interested in a specific food plan, while younger pet owners (aged 18-24) are open to the idea.

Consultation by video call

Many pet owners are open to the idea of having online consultations with their vet. 45% would be willing to try this kind of video call. 43% of owners would rather not use this method. Others have already tried it, and say it went well (8%). Having experienced a consultation this way, 4% of pet owners say they still prefer seeing the vet in person.

People in the US are the most likely to have been satisfied with an online consultation. Canadians are the most open to trying a video call with their vet, whereas French pet owners are the least likely to be open to the idea. ♦

Special thanks to *Yummypets*



Lisa van Roon
Head of Operations
GlobalPETS

Vets are feeling the pressure

As the current cost of living continues to rise, the President of the British Veterinary Association talks about the impact on his profession and emerging animal welfare challenges.



When we hear desperate stories of increasing numbers of pet owners making difficult decisions to give up beloved family pets, it brings the reality of this cost-of-living crisis into sharp focus.

Can we still afford pets?

But it's not only owners and their pets who are feeling the crunch. Businesses – including vet practices – are also finding it challenging to navigate the crisis. Vet businesses across the UK are facing inflation, surges in energy bills, as well as fluctuating costs and availability of medicines.

However, it's probably no surprise that vets' greatest concerns relate to the impact the cost of living is having on animals. We know that pets are regarded as a member of the family and provide comfort when times are tough, so it's a double whammy when owners struggle to care for them. Being unable to afford pet food, pet insurance or medical care is becoming a sad reality for too many of the UK's animal lovers. Many animal welfare charities and rescues are reporting a significant rise in the number of animals being relinquished by owners because they simply can't afford to keep them.

Impacting pet health

There are concerning reports that vets in practice are seeing increasing cases of animal welfare being compromised as owners are delaying seeking medical attention for their pets because of their own financial worries. Delaying treatment comes with the risk of issues escalating. Which, in turn, can mean that at the

end of the day more medical care is required. This usually also means higher costs, as well as risking increased suffering for the animal.

Veterinary professionals around the UK are trying to encourage owners to speak to their vet early if they have any concerns about their pets' health and to be open and honest, particularly if money is a concern. Up-front conversations mean vets can help their clients with a course of action: whether advising on preventative measures to help reduce vet visits or talking through treatment options to help owners make the best decision that not only prioritizes the pet's welfare but also considers all their circumstances.

Caring for pet parents too

We are hearing touching stories about how some vet practices have opened pet food banks to help struggling owners to feed their animals or have opened their practices so people who may be finding it hard to cope with the cost-of-living crisis have somewhere warm to go.

Vets may be there to treat animals, but I'm proud to hear how our incredible profession is providing kindness and support to their human customers as well. ♦



Dr. Malcolm Morley
President
British Veterinary Association



What's up with veterinary telemedicine?

Telemedicine is the ideal way to examine pets without having them undergo stressful moments during a visit to the vet. Yet, uptake appears to be slow. Why is that?

Despite slick marketing that underlines the benefits of remote robotic surgery and diagnosis using smart collars, the reality of veterinary telemedicine has much more in common with a FaceTime chat. Telemedicine is nothing more than 'medicine at a distance', covering multiple solutions. Using modern means of communication, healthcare providers are enabled to help their patients remotely. The fundamental relationship between a vet and their client remains unchanged.

VCPR first

As in live consultations, first comes the establishment of this veterinarian-client-patient relationship (VCPR). Once this has been done, the spectrum of testing, treatment and advice that constitute veterinary medicine can begin.

Already, telemedicine is used by many vets. In fact, most practicing veterinarians spend several unpaid hours per week using telemedicine in the form of phone calls, email, fax and text messaging. But few use video calls, despite the fact that this means of communication produces better clinical information. Importantly, most current veterinary telemedicine takes place within an existing VCPR, something that dramatically limits its scope.

Seeing is knowing

The benefits of video diagnostics are many. Good information about an animal's health can be gleaned during a high-quality video call. Skin conditions and respiratory status can be assessed remotely. In some cases, such as behavior and mobility-related issues, a telemedicine examination can yield more accurate information than an in-clinic examination. Not to mention the convenience, flexibility, and decreased stress (and risk of getting bitten!). Yet, even though a smartphone and the internet are all that's needed, only very few vets regularly use video-based telemedicine.

Even during a lock-down period in 2020 due to COVID-19 – when strict stay-at-home regulations were widely prevalent – less than a third of vets used live video chats with clients. Of these, most used video consultations less than once a week. This, despite vets reporting that it was not difficult to use. Before the pandemic, less than 5% of veterinarians used video chats, and it is expected that the number of video calls will drop to such pre-pandemic numbers.

Unease beats usefulness

A few common explanations are usually given for a lack of interest in telemedicine. These include unclear or major legal implications of distance VCPRs. ► [SEE NEXT PAGE](#)



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The inability to perform a ‘complete’ physical exam, and a lack of client demand, are also much-quoted reasons. Survey after survey of veterinary attitudes toward telemedicine finds uneasiness rather than excitement the driver to use new clinical remote diagnostics tools.

Although it promotes the use of telemedicine in general, the American Veterinary Medical Association (AVMA) has been a strong advocate for restricting telemedicine within a preexisting VCPR (that is, one established in person). This eliminates the possibility of new diagnoses or prescriptions purely through electronic means. Hotly debated, there is no evidence of harm from telemedicine VCPRs. In fact, many US states waived the physical exam requirement during the COVID-19 pandemic in order to comply with public health goals. In the Canadian province of Ontario, where telemedicine VCPRs have been legal since 2018, no widespread problems have been recognized.

Even without evidence of harm, many veterinarians consider telemedicine risky: fearing they’ll miss important examination findings and they are weary of running afoul of governing bodies. But just as phone-based services, such as pet poison hotlines, have been widespread for many years, the distinction between telemedicine and in-clinic medicine is an artificial one. Emails and phone calls from clients are triaged without being given a second thought. There is no reason why veterinarians can’t provide help from a distance.

Enormous potential

So far, video telemedicine and electronic VCPRs have remained parked in the garage, victims of poor public relations, not empirical evidence. Consumer pressure seems likely to be the cause of a shift: as tech-savvy, millennial pet owners want to prevent their animals from undergoing negative emotional experiences (for instance, a trip to the vet). This could be a great opportunity for new business in an enormous potential market: tens of millions of pets in the US go without regular veterinary visits.

In fact, most cat owners and many dog owners reported that their animal *hates* going to the vet, and that they would be more likely to take their pet in if it wasn’t such an impacting experience. A veterinarian offering a stress-free video examination is sure to have a market edge!

A veterinarian offering a stress-free video examination is sure to have a market edge!

Risks and benefits

This is not to say there won’t be hurdles to overcome. Professionals’ concerns about the quality of telemedicine VCPRs are justified. In human healthcare, some evidence suggests that direct-to-consumer (DTC) telemedicine increases the risk of inappropriate antibiotic prescriptions. Already, veterinary DTC companies are taking advantage of the few states without in-person VCPR requirements, to prescribe remotely. As yet, there is no clear understanding of risks and benefits.

Veterinary telemedicine finds itself in a period of turbulence. A mix of advocacy groups, venture capitalists, shifting demographics, and modern tech are pushing from all sides, making any outcome as to how things will evolve unpredictable.

One thing is clear: nothing in telemedicine, so far, has changed the fundamental practice of medicine. Whether a VCPR is established remotely or in the clinic, the professional judgment of a veterinarian is still the foundation of good practice. Malpractice, as well as medicine, can be performed electronically. The current face-to-face system has serious flaws: serious issues regarding professional mental health, inefficiencies in practice flow, and huge gaps in access to care.

Reduce animal suffering

Why not use telemedicine to bridge these gaps? If medical care can be initiated with the touch of a button, more VCPRs can be established, and more animals can be connected to highly trained professionals. Vets swear an oath to reduce animal suffering. Yet, a trip to the vet is one of the most stressful things most pets ever experience. Using telemedicine just simply as a screening tool for unnecessary visits to the vet would spare millions of animals emotional harm. And let’s not forget the many potential benefits of telemedicine. ♦



Dr. Greg Bishop
Veterinarian



Market trends in odor control products

With hygiene appearing to be more important than ever before for pet owners, we look at the state of play of the segment.

The global pet stain remover and odor control market was estimated at \$8.4 billion (€7.7B) in 2022 and is expected to reach \$12 billion (€11B) by 2032, according to Future Market Insights (FMI). And the forecast looks bright for investors boosting new product development.

Younger customers

Millennial pet parents are high spenders when it comes to odor control: they consider the health and cleanliness of their animals as being of prime importance.

According to Packaged Facts, dog owners are more likely to purchase odor control products than cat owners. There appears to be an increasing demand for products that are not harmful to pet health, while also being environmentally friendly and good for the planet.

Top 3 cleanup and odor control products by sales (US, 2021)

Cat litter	\$4 bln
Puppy/training pads	\$820 mln
Dog waste bags	\$525 mln
Pet cleanup / odor control product	\$506 mln

Source: Packaged Facts

While cat litter sales represent around 73% of the category, training pads registered the highest increase:

increasing from \$525 million (€492M) in 2016 to \$820 million (€769M) in 2021 (+9.35%). Dog waste bag sales shot up by 7.6%.

Market potential

Understandably, some manufacturers are tapping into the sales potential of this growing pet supplies niche. Take, India-based grooming start-up Zoivane Pets: in 2019 they launched a potty-training spray to train cats and dogs. They also introduced a stay-away spray to restrict a pet's movements in specific areas of the house. The brand, that is currently present in 300 cities across India, sold more than 50,000 of these sprays to date.

In a similar vein, in December 2022, Zoivane Pets raised \$608,000 (\$561,500) in seed funding to boost its product development. Californian-based BioLargo, which launched its new pet odor control POOPH in 2021, now aims to increase sales by 125% in 2022. This will be thanks to what they see as the 'dramatic revenue growth' of this product. The company recently rolled out POOPH in Walmart as part of a national retail rollout strategy. ♦



David Palacios Rubio
Head of Editorial
GlobalPETS



What's new in accessories for dogs?

From easy-to-wear materials to less-pressure fit, we dive into the latest trends in harnesses, collars and leashes.

The market for dog accessories is constantly growing and evolving. Rather than wearing old, worn leather collars and leashes, dogs can now look as individual as their owners. Additionally, the digital age brings exciting smart-technology opportunities.

Harnesses

Harnesses are becoming a more popular choice for walking dogs, resulting in a high growth rate in the harness market. Harnesses come in all shapes and sizes, with the main goal being to make the walk safer, more comfortable and more enjoyable for the dog and the owner.

Owners of puppies will often select the step-in style, where the paws are placed inside and the harness clipped over the top. For many, this is much more convenient, especially when the puppy/dog is less happy about having a traditional harness put over its head.

Greater control

H-style back-clip harnesses are currently dominating the adult dog market, accounting for 55% of the market according to Maximise Market Research. As double-ended leashes have become popular, these harnesses are seeing the addition of a second attachment point, on the chest strap. This may offer better control: reducing pulling on the lead, as well as reducing pressure on the neck area – which may arise from using a collar alone.

The top-selling harness on Amazon UK is the Julius K9 due to being so robust, easy to fit and offering a large handle to provide greater control. More recently, there has been an increase in sales of 'anti-pull harnesses'. Unfortunately, however, many of these harnesses rely on adding pressure on the sensitive 'squishy' areas and may be looked on less favorably by some owners and trainers. In a recent study by Dr. Zink (WholeDog Journal), anti-pull harnesses were found to be detrimental to a dog's posture and gait. [▶ SEE NEXT PAGE](#)



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Farm Company ITALY
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Zoomark 2023 – Hall 25, Booth C81

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Collars

The sales of collars are predicted to continue to rise in the coming years, especially in the US, which is one of the world's largest markets for collars. This predicted growth is not surprising as owners are opting for better identification, fashion, control and monitoring for their dogs. Amy Dyck of Homes Alive Pets writes in *The Best Dog Collars Guide 2022: How to Choose the Right Dog Collar* that nylon dog collars are the most prevalent ones. This suggests that traditional leather collars have fallen out of favor over the years, due in no small part to the 'huge variety of patterns, colors, widths and qualities available within the dog collar category'.

Leashes

Leashes come in a range of types and sizes, with a standard leash most commonly measuring around 6 feet (1.8 meters) long. However, there is a plethora of retractable, elasticated, double-ended and longer leashes to help give the dog more freedom whilst maintaining an appropriate level of control for the environment.

Deciding factors

A number of factors can influence the decision for a particular product, such as comfort, strength, mechanics, aesthetics and the type of material:

- **Safety and durability**

When it comes to finding the right collar, leash and harness, the top consideration is safety, followed closely by durability. The collar is ultimately designed to help keep the owner's dog secure when out and about. Safety factors to consider include escape-proofing and visibility. A collar should fit around the dog's neck and/or body without pressure and allow an average adult to slide 2 fingers underneath.

- **Strength, comfort and practicality**

Whilst leather may traditionally be seen as the more durable, comfortable and stylish option, there is a downside when cleaning. Moreover, in line with growing consumer interest in vegan products for dogs (according to The Vegan Society, 2022), many consumers are turning to nylon, which offers various other advantages – including cost, style options, ease of washing and practicality.

H-style back-clip harnesses dominate the adult dog market.

- **Versatility, flexibility and ease of use**

Certain types of leashes help to make walks easier and more enjoyable. The retractable flexi-leash, invented in 1972, was welcomed for providing dogs with more freedom while owners retained some control over them. But despite their popularity with dog owners, over the past few years there has been growing concern in the dog industry about their safety due to mechanical failure and injuries. This has resulted in a variety of alternatives such as 'long lines' which can range from 3-12 meters (10-40 feet) or more.

- **Aesthetics**

The vast range of colors and styles of leashes, collars and harnesses on the market – from classic leather collars to colorful nylon and more modern biothane leashes – can help owners to create a personalized look for their dogs. Whereas collars traditionally served the purpose of restraint and protection, they are increasingly becoming an extension of the owner's personality. 20% of pet owners in the UK spend at least £20 (€22.50/\$24) per month on outfits for their pets (Geo Marts).

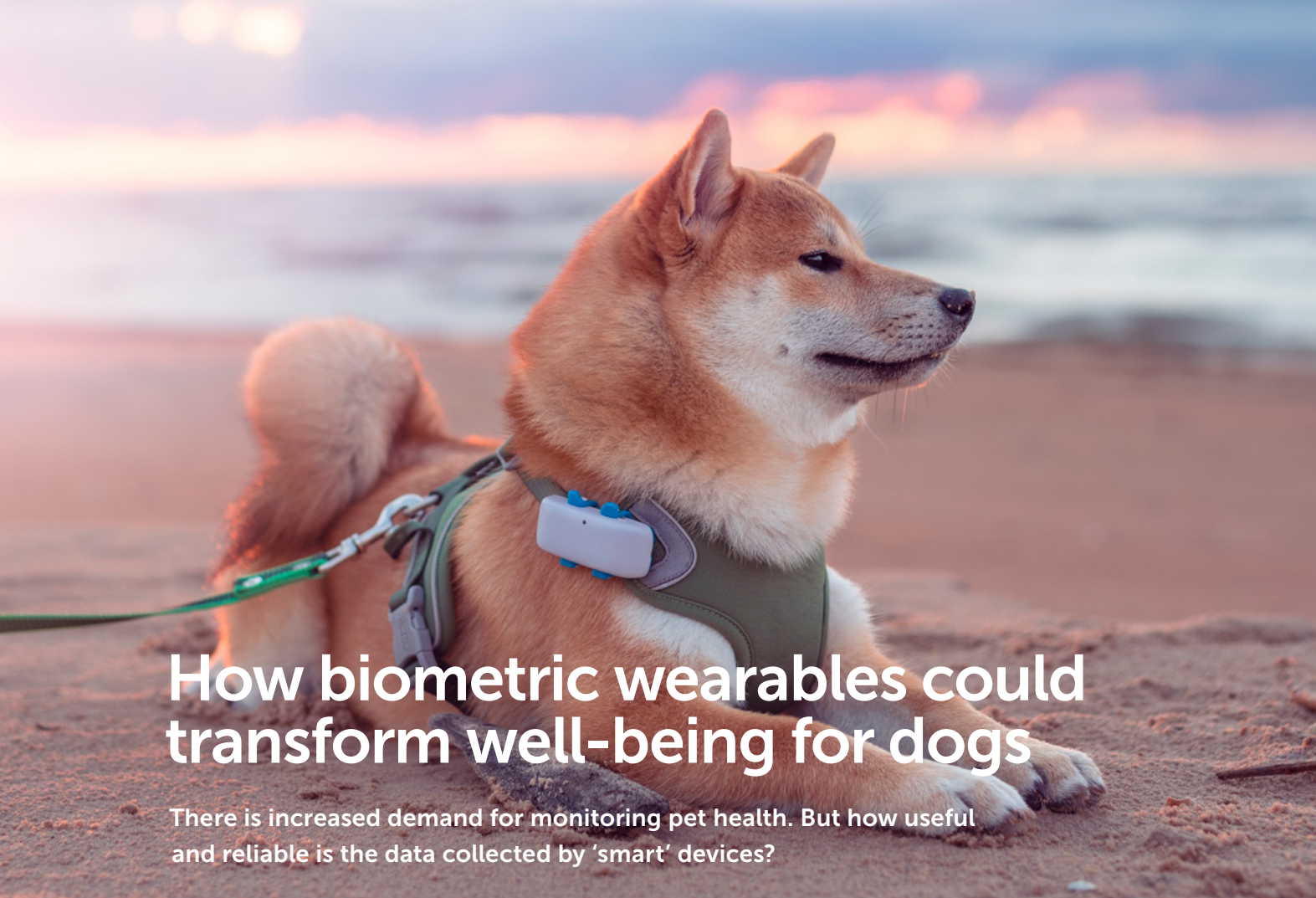
But it's not only style that is important; 'awareness' leashes, collars and harnesses are another recent trend, in which yellow is often used to identify dogs who need space or are anxious (My Anxious Dog UK, 2023). Pet owners note that their own anxiety decreases when their dogs wear such accessories.

Innovative technologies

Smart technology has generated enormous opportunities in the dog market. As dog theft is becoming more common, there has been a rise in owners spending money on electronic collars to help track and monitor their dogs. Therefore, the GPS dog collar market is set to witness gradual growth during 2021-2031 (Fact.MR). Besides meeting the growing need for safety, technological advancements also help owners to monitor their dog's health. ♦



Helen Motteram
PETS International Contributor



How biometric wearables could transform well-being for dogs

There is increased demand for monitoring pet health. But how useful and reliable is the data collected by 'smart' devices?

Humans have benefitted from on-the-wrist heart-rate tracking for years, and the dog equivalent seems on the verge of going mainstream this year. While a number of products offering doggy biometrics via a collar or harness have been promised in recent years, 2023 is shaping up to be the tipping point as multiple new products are entering the market.

Early warning of health issues

French consumer electronics company Invoxia is about to launch its Smart Dog Collar priced at €169 (\$182), with a compulsory €8 (\$8.60) per month subscription. It not only promises up to 15 days of GPS tracking on a single charge, but also continuous tracking of the dog's cardio-pulmonary system via the company's Heartprint technology. This provides early warnings of health issues via the connected app.

"Dogs can't express themselves to say something is wrong," says Invoxia CEO Amélie Caudron to PETS International. "This means that oftentimes we

wait until it's too late or until it's a very complicated situation before taking them to the vet."

For example, Caudron claims that the collar can detect tell-tale symptoms of Mitral valve disease – a heart condition that's very common in King Charles Spaniels – allowing vets to intervene early, which potentially adds months to a dog's life. She cites a recent study suggesting that the early diagnosis of congestive heart failure could give the pet an extra 10 to 15 months of life. "Which is huge given that a dog only lives 10 to 15 years," she states.

Use of data

The company hopes that when enough dogs worldwide are wearing the collar, it will be possible to build a database of canine biometric data of unprecedented scale. After all, clinical results aren't necessarily representative due to the extra stress dogs are under in a research setting. And Caudron believes the benefits go beyond refining existing knowledge.

“From this database, we’ll be able to find new markers of pathologies, to find correlations,” she continues. “The more dogs that wear our product, the more correlations we can find and the more diagnostically powerful the data becomes.”

Tracking the animal’s heartbeat

While human wearables use optical heart-rate sensors to detect heart rate, such an approach won’t work with most canine subjects due to the coarse hair disrupting measurements. Radar is an attempt to sidestep this problem. The technology involved in Invoxia’s solution is miniaturized radar sensors combined with edge artificial intelligence (AI) to track biometrics.

Taiwan’s Industrial Technology Research Institute (ITRI) has a similar system in place with its iPetWear collar technology. “We use the small radar sensing technology that can be put on the animal’s neck to detect heart rate and respiration,” explains Director Dr. Hong-Dun Lin.

“You can use the app to detect most vital signals without the removal of hair from the animals,” Lin continues. The company also has plans to move beyond furry patients onto ‘husbandry applications’ for animals like cows. A number of Taiwanese companies are already interested in licensing the technology this year, and availability in Europe is anticipated within a year. The cost of each device will be less than €93 (\$100) and will likely be supplemented with a subscription for data analysis.

Skepticism

Not everyone is convinced that the technology is ready yet. Dr. Firat Güder, an expert on intelligent interfaces at Imperial College London’s Department of Bioengineering, is one such skeptic, having researched the area himself for years.

“There are a few companies that say they’re going to release products that can do this, but most of these companies never publish their data,” he explains. “It’s my view that most of these collars do not really work well, especially at the price ranges where people are claiming to make these things work.”

In his own research, Güder has run into 3 major problems: the diverse range of dog breeds, the

excitable temperament of dogs and, of course, the hair. “Before an operation, people with minor chest hair will be shaved to put electrodes on – and human hair is nothing compared to a dog with 10-centimeter-long hair all over its body.” He’s still not convinced about the ability of radar technology to overcome the hair problem: “Even that would kind of struggle to work reliably all of the time.”

Is it viable?

There is also a variability problem, he explains: “Small dogs have different heart rates than bigger dogs. And then even bigger dogs, depending on the breed, will have different physiological manifestations of their metabolism.” The good news? None of this is insurmountable, according to Güder. But so far, he has seen no evidence to suggest that reliable retail solutions are imminent, so he is concerned that companies are pushing human solutions on a fundamentally incompatible species.

Instead, he advocates a bottom-up solution led by engineers and scientists, but that requires serious investment in terms of both people and time. “We’ve been working on this for around 9 years now, and we’re only just at a place where we feel comfortable that what we know is enough to be able to solve problems,” Güder says. His newly formed company is aiming to commercialize stretchable sensors for more reliable body contact. He claims that “pretty good prototypes” are expected within the next 2 years.

Despite this, the companies with more ambitious release dates in mind seem pretty confident in their data. Invoxia claims 98% accuracy with support for 90% of the top dog breeds in the US and Europe (albeit based on an unrevealed sample size).

But the real test will come when the first smart collars adorn the necks of pets around the world. If the data isn’t reliable enough for vets to take seriously, then owners may quickly cancel their subscriptions, leaving a seemingly promising market sector dead on arrival. ♦



Alan Martin
PETS International Contributor

Enhancing customer loyalty in the pet business



GlobalPETS Forum 2023 in Berlin was inspiring for global insiders – presenting the action they can take to achieve the difficult task of keeping pet parents attached to their brands.

If there was something that all speakers and attendees at the GPF 2023 event in Berlin agreed on, it was that the customer should always be at the center of any pet business.

Main priority

Silke Esser, Director of Strategic Marketing at Zooplus, said that the online pet retailer made their loyal customers the main priority. “We want to be different from Amazon, we are specialists and this is our expertise, we have strong skills,” she said. The German-based company has 10 million active customers and, according to Esser, there is 98% sales retention – what she calls the Zooplus heartbeat.

IskayPet, a Spanish pet retailer with over 4 million active customers and a yearly turnover of more than €400 million (\$427M), sells 75% of its products to its recurrent customers. “We have a lot of information about them,” said the company’s CEO Marcos Ruao. He also pointed out that “it is much easier” to gain loyalty from customers that buy in-store or omnichannel than with an online transaction where there is almost no interaction.

Choosing the right strategy

Alexandra Dobra-Kiel, Innovation and Strategy Director at London-based behavioral consultancy Behave, asked the attendees why a company should care about loyalty. And the answer is clear: acquiring a new customer costs 5 times more than keeping an existing one.

Silke Esser from Zooplus shared her thoughts on the basic requirements for customer loyalty: *financial* – with the implementation of a reward program, *structural* – allowing the customer to re-order the same products in an easy way, *emotional* – that the customer feels the brand is an expert, and *behavioral* or customer centricity. She disagreed with the traditional approach of “one size fits all”, as it implies a lack of personalization in communication with the customer. And she pointed out that this communication needs to be in line with the purchasing cycle.

Esser mentioned the rewards program as a very attractive way to contribute to customer loyalty, as well as to offer customers targeted coupons that give

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them the chance to save money. And it seems that this strategy is paying off. "Over 50% of our customers want to stay with us."

More than just a happy pet parent

Although fidelity as a concept is key to building brand loyalty, Dobra-Kiel reminded the GPF 2023 audience that it is not the only way to go. "A lot of companies think that customer satisfaction is transactional, but it is more than that. It is about nurturing the relationship with your customer," she stated, adding that more and more pet companies are investing in customer success.

Consistency is a critical part of this process and it must be reflected across the consumer journey in order to build an emotional attachment based on affection, passion and connection. Dobra-Kiel shared some examples, like Chewy, which sends cards to pet owners whose pets have died, or Petco launching a campaign for customers to share their personal experiences. She also talked about always giving rewards – not necessarily a discount, just symbolically – to encourage customers to get into the habit of staying loyal to a brand.

David Sprinkle from Packaged Facts shared some views on how important loyalty is in today's world. He pointed out that, in addition to free shipping and rewards points, an increasing trend in pet care is to offer payment options for the services on offer.

How the future looks

'Future' was perhaps one of the most repeated words at the GlobalPETS Forum. Kristel Vanderlinden from FutureKind, a Creative Think Tank with headquarters in Antwerp, said that retailing is set to be more personalized, more community-driven and with an emotional bond attached.

[▶ SEE NEXT PAGE](#)





She also mentioned the 'trend of less' economy, with a consumer mindset focused on consuming less. "It is not about possession anymore, but about products having a circular approach," she said.

Vanderlinden advised the pet industry to boost its relationship with customers by offering higher personalization. She also recommended using the retailing space for advertising other brands.

Sprinkle from Packaged Facts highlighted the medicalization of the industry, which is a "real driver" in the market, and said there are more young pet parents paying extra attention to pet health and wellness since the pandemic. According to the data he presented, 45% of Gen Z/millennials think that way, followed by Gen X (40%) and boomers (35%).

Pet retailers versus grocery stores

During a panel discussion, the CEOs of Josera (Germany), Intersand (Canada) and VAFO Group (Czech Republic) discussed consumer behavior.

Stephane Chevigny from Intersand said that they don't see a lot of their customers moving from specialist stores to mass markets, because they are looking for quality products. "They are still willing to pay more," he stated.

Private label is expected to play a central role in this. Stephan Hoose from Josera added that 70% of their sales are of this kind of product. "It is easy to explain private labels in the specialist retailer, but not in the grocery channel."

VAFO Group's Jakub Majer suggested that pet businesses need to develop new ways of communication in order to handle the new type of pet parent. "We have to learn how to communicate using tools that are still new to us. If we want to succeed, and to communicate with the customer, we need to do it," he concluded.

TikTok, the new way to communicate?

TikTok was given as an example of social media where the pet industry should be active.

CEO and Co-founder of Petfluencer Thomas Poschen said that this specific social media platform is no longer just a fun and video app. "A lot of people aged between 28 and 34 are using it." He also warned that companies that are not yet using TikTok "are doing something wrong."



On the other hand, IskayPet's Marcos Ruao reminded the attendees that pet retailers need to understand both types of customers. "We need to worry about Gen Z and Gen X, but also about the rest of the customers. We need to manage it all," he concluded. ♦



David Palacios Rubio
Head of Editorial
GlobalPETS



Snellman wins 2023 GlobalPETS Forum Award

The Finnish pet food producer follows in the footsteps of 2022 award winner Josera and takes home this coveted prize.

During each year's GlobalPETS Forum, one company receives an award for demonstrating exceptional performance in relation to the theme of the event. This year's theme was 'Lifelong customers in an omnimarket'.

Five nominees

Five nominees had their eye on the prize this year: Snellman, Montego Pet Nutrition, Company of Animals, KIKA Group and PharmaPets. Snellman came out on top, as the judges were impressed by its omnichannel strategies and how the company ensures customer loyalty by creating a higher awareness of raw nutrition.

On being presented with the award at the 2023 GlobalPETS Forum in Berlin, Snellman Petfood Director Magnus Pettersson said: "All these years, we've been advocating natural, raw and unprocessed food, and guiding consumers on handling it. I'm glad that we, as a manufacturer of natural dog food, get this recognition in an industry where ultra-processed dry food is still the most commonly fed."

Pettersson added that Snellman has come a long way "from a small company to an internationally known player in the pet food industry."

Championing raw products

The Snellman Group is a family business working in the food industry, with roots in Pietarsaari, Finland. It was set up in 1951 by the brothers Kurt and Lars Snellman to process meat and sausages.

The company started producing pet food in the early 2000s. Today, it has 3 brands: Mush, all-natural, raw food for dogs and cats; Fodax, frozen raw food and freeze-dried snacks for dogs; and Raw for Paw, freeze-dried dog treats and nutritional supplements for dogs. As Snellman says: "We have done a lot over the years to educate consumers, not only on how to serve raw products to their pets, but also on the risks of handling raw foods."

Consumer awareness

The company's primary objective is to continue building consumer awareness for all its brands so as to support its customers' commitment to the raw food cause. "We want them to share our belief in how a pet should be fed." One of Snellman's key strategies is building on the 'why' concept, explaining to consumers its principles of feeding unadulterated food to pets.

Snellman's pet food division has also built a strong presence across various social media platforms, aiming to be part of the community and to listen carefully to its customers. "Our job is to make tools and media available for these genuine believers of raw food to be able to share their experiences." ♦



David Palacios Rubio
Head of Editorial
GlobalPETS

Ready for innovations, inspiration, encounters and education at Zoomark?

Zoomark is back, and it's bigger than ever. Scheduled for 15-17 May 2023 at BolognaFiere, Italy, the show is ready to make its mark with record numbers.

Occupying 68,000 sqm, and no less than 7 halls (16, 21, 22, 25, 26, 29 and 30), this edition of Zoomark is set to be the biggest ever.

All the major players in the pet industry have confirmed their presence in Bologna. This year, more than 900 exhibitors have chosen Zoomark as their official showcase and 70% of them come from a total of 48 countries. They represent the entire range of product categories in the pet industry.

Hall 16: megatrends and innovations

NEXT is the brand new area devoted to *start-ups* which gives them an opportunity to introduce themselves to the pet business community for the first time. In this space dedicated to young businesses, visitors will find a host of new ideas and inspiration from the industry's cutting-edge.

The *Pet Vision* area offers insight into 5 megatrends set to shape the pet market in the near future:

- **VALUE FOR MONEY:** products and services that offer an optimum quality-to-price ratio
- **GREEN TRANSITION:** products and services that stand out for their genuine environmental sustainability and social responsibility
- **HEALTHY & FUNCTIONAL:** products and services for health and functional purposes
- **TAILORMADE:** bespoke products and services that are highly specialized and customized

- **SPOIL ME MORE:** products and services that treat pets to extra-special attention.

Brand new competition

These 5 categories will also be the focus of a brand new competition, judged by a panel of top international trade journalists, who will select the best (and most innovative) products presented at Zoomark on 16 May.

Educational events

An additional attraction for exhibitors and visitors alike is the 3-day show's jam-packed program of educational sessions. These include sales sessions focusing on rapidly developing markets and regions, scientific insights into animal nutrition and health, and seminars on techniques for improving sales and making the most of modern technology tools.

A birthday to celebrate together

2023 marks the milestone 20th edition of the show, and Zoomark is preparing to celebrate at the end of the first day, on the evening of 15 May. Exhibitors and visitors are invited to participate in a relaxed, informal celebration that will provide an opportunity to meet and make new professional connections, reminisce about past editions, reflect on the present and make plans for the future. ♦

For further information:
zoomark.it



The impact of inflation on pet parents' wallets

More owners now admit to experiencing challenges with paying the bills for their pets. We analyze the way higher prices are changing the consumer mindset in different parts of the world.

The pet industry might seem recession-proof, but pet parents are currently facing an additional struggle which is burning a hole in many consumers' pockets. While most of them say they still prioritize their pet's well-being, the reality is that they are trading down in pack size or quality and looking for ways to pay vet bills.

Recession fears

A recent survey by the American Pet Products Association (APPA) concluded that 1 in 3 pet parents worry about pet expenses, with recession fears plaguing 69% of pet owners in the US. An additional 60% are concerned about their personal finances this year, in a country where pet products increased by 12% last year. The average inflation in 2022 was 8%, according to the US Bureau of Labor Statistics.

As many as 6 out of 10 respondents admit that they are spending less on non-essential items than a year ago. One-third of pet parents are concerned about the cost of having a pet in the current economic crisis, and 18% dread that they may have to give up their pet. Last December, 8% of pet parents in the US postponed getting a pet.

Finding a way to pay

Another research study, from the financial platform Credit Summit, concluded that 83% of American pet owners borrowed money at least once to pay for pet care. The findings, published last February, show that 31% of pet parents had to turn to payday loans and title loans (using their vehicles as collateral) to pay vet bills.

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Lowering the tax applied to certain pet supplies such as food is being discussed in the UK.

The survey also revealed that nearly 32% of the respondents had to decline treatment for their pet because they couldn't afford it.

Online pet shop Pets4Homes found out that, in 2022, 18% of pet owners in the UK had pet care debts, 25% of them indicating that they won't take their pet to the vet due to the high costs. Nearly 1 in 10 are even contemplating giving up their pet as expenses soar.

Top 3 spending claims among American pet parents

50%	Agree they are spending significantly more on pet food than a year ago.
41%	Intend to spend less money on pet supplies.
39%	Plan to switch to cheap products if prices continue to increase.

Source: The APPA Pulse Study: Pet Ownership In The Current Economy

Trading down

A direct impact of high pricing is on consumer purchasing decisions. APPA states that there are no changes in brand fidelity trends in the US, with 57% of owners considering themselves very loyal to a specific brand when it comes to pet supplies. And most of them (66%) are committed to maintaining the pet's current diet despite headwinds.

The Pets4Homes survey in the UK showed that 38% of respondents switched to cheaper pet foods. In 2022, accumulated inflation in pet supply prices in the UK reached 13.3%, according to the Consumer Prices Index. This is more than global consumer goods, which rose by 10.5% from January to December 2022.

Looking for smaller packages is a trend that is slowly spreading among pet parents. "Consumers are saving money in the short term instead of buying larger, bulk items that represent more pure value," a Nielsen IQ study points out.

The recently published 2023 Global Consumer Insights Pulse Survey conducted by PwC Consulting concludes that 96% of general consumers are intending to adopt cost-saving behaviors over the next 6 months.

Insurance provider PetExpert reports that pet-related costs have skyrocketed in Belgium, with veterinary costs climbing by over 20% in 2022 alone. In the Netherlands, Dutch retailer Pets Place has said that 20% of their customers spent less money on their pets in the second half of 2022.

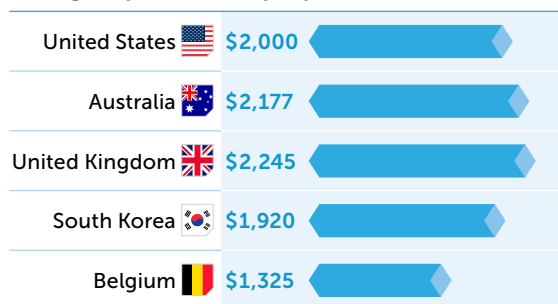
Lowering VAT in the UK?

The UK government has urged pet food manufacturers to support customers. "I make a plea to dog and cat food manufacturers to help their customers at this challenging time," said Environment Secretary Thérèse Coffey during a Parliament hearing of the Department for Environment, Food and Rural Affairs in late February.

Ahead of the price rises, the option of lowering the tax applied to certain pet supplies such as food is on the table, with the aim to reduce the pressure on consumers. While the UK does not plan to change value-added tax (VAT) rates for specific products, Coffey asked representatives to let the government know what they can do "to make sure that our pets get fed".

This follows the call from animal welfare charity Dogs Trust to remove the 20% VAT on pet food in a bid to help pet owners. According to the organization, this action could prove "critical to many pet owners, offsetting spiraling prices to keep pet food affordable".

Average expenditure of pet parents (2022)



Sources: Insuranks, RSPCA Australia, Statista, PetExpert



Buying smaller packages is a trend that is slowly spreading among pet parents.

The actual numbers

American pet parents are believed to have spent roughly \$2,000 (€1,879) on their pets last year. According to the insurance comparison platform Insuranks, half of them spent more on their pets than in previous years. The data reveals that the average spending on essentials – such as food, toys, litter and supplements – reached \$110 (€103.4) per month.

In Europe, a recent Statista report concluded that owning a dog costs an estimated £1,875 (\$2,245 / €2,117) a year in the UK. Belgians spend €1,250 (\$1,325) per year on their companions, according to PetExpert.

In the Asia-Pacific region, South Korean consumers are spending an average of ₩208,000 (\$160 / €150) a month on their pets. According to Statista, the cost of imported food increased the most. In Australia, it is believed that pet parents spend A\$3,237 (\$2,177 / €2,059) annually. ♦



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Jochebed Menon
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Is autoship the new revolution in pet retail?

More businesses are implementing recurring orders into their retailing ecosystem. Consumers are embracing its convenience.



Several pet retailers have added autoship services to their e-commerce businesses in recent years. At the same time, others have experienced a significant growth in existing schemes.

Contributing to success

When Chewy announced a 14.5% year-on-year growth in sales during Q3 2022, taking revenues to \$2.5 billion (€2.3B), the US online pet retailer credited a huge proportion of this success to the continued popularity of its autoship service.

Nearly three-quarters (73.3%) of total Chewy sales in the 3 months to October 2022 were channeled through its automated reordering program. This free-to-join membership service offers customers discounts on those items they want to have shipped on a regular basis.

Already a longstanding service at Chewy, repeat orders were established shortly after the company's launch in 2011. It is now a part of the business that continues to grow steadily – with sales up 18.8% year-on-year – reflecting a wider industry uptick in automated ordering services.

Petco CEO Ron Coughlin pointed to the strength of Petco's subscription services as a source of growth during Q2 2022, with recurring customer revenue up by 54%.

Enhancing customer relation

Pet Supplies Plus also launched its own autoship program in 2021. It spans food and other replenishable items, such as cat litter and puppy training pads.

When Canadian specialty retailer Pet Valu introduced its autoship service in September 2022, it added another benefit. Leveraging its 640+ store network, Pet Valu offers pet parents the option to pick up orders in-store or opt for home delivery.

The company says that it is happy with the initial uptake and that the new service has deepened its relationship with pet parents. "Our customers rely on us to have their desired products in stock when and where they need them," says Chief Marketing and Digital Officer Tanbir Grover. "Autoship helps meet these needs by enabling inventory assurance for our customers while also providing convenience for those pet lovers who have less time to make a manual purchase online or in-store."

The free service, which offers cancellation up to 24 hours before a scheduled order, spans a wide range of products, including food, health and wellness, litter and bedding, waste management, water and fish care, as well as house training and grooming products.

Understanding the popularity of autoship

For Diane Pelkey, VP of Communications & PR at Chewy, the availability of an automated reordering service ticks a number of boxes for customers. "It provides pet parents with convenient and flexible automatic reordering and delivery that makes meeting their recurring pet needs even easier," she says.

Pelkey points out that reordering services aren't limited to pet food either. They also cover frequent and essential purchases, such as prescription medication.

Autoship models encourage customers to spend more money with a single retailer.

And, of course, there's the ability to tweak delivery schedules to reflect pet and pet parent needs.

The benefits are reciprocal too, with plenty of evidence that autoship models encourage customers to spend more money with a single retailer – even without minimum requirements on either spending or delivery.

Research by Consumer Intelligence Research Partners estimated that a typical autoship pet customer spends an additional \$350 (€325) per year, ordering 15.5 times annually, versus 10.4 times for those not signed up for this service.

Recurrent purchases are typical for younger, more affluent shoppers, for whom convenience is a considerable draw.

Extra benefits

Of course, with so many retailers looking to tap into the popularity of autoship models in recent years, there's also increasing competition to distinguish services from one another using added extras. Often this boils down to additional savings, including a range of discounts, free delivery for future orders, or points in the retailer's rewards scheme.

At Chewy, meanwhile, autoship customers also benefit from free and unlimited virtual access to their Connect with a Vet telehealth service. A licensed vet is available to answer pet parent questions.

All in all, it's an ongoing process to refine the autoship service to be the best it can be. Pelkey sums up: "We are always working to make the shopping experience even better and more seamless for our customers. This includes personalization and convenience for pet parents." ♦



Megan Tatum
PETS International Contributor

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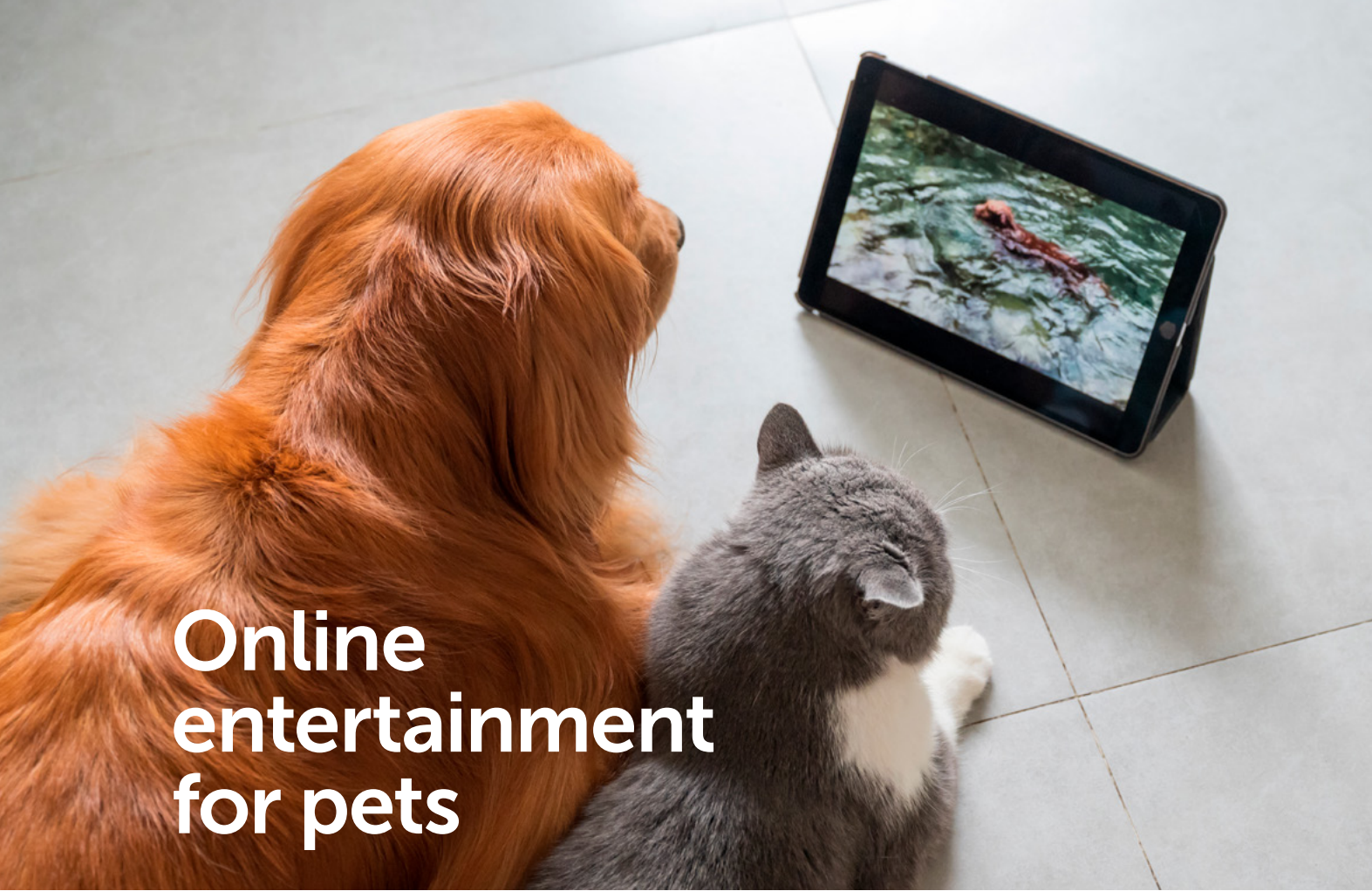
The chitin from the insect larvae is roughage for the intestines and can have a positive effect on digestion. The slightly nutty note of the product is suitable as an "appetizer" for taste-sensitive dogs, so that they are happy to eat their ration and thus improve their muscles.



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Online entertainment for pets

The humanization of pets is leading to a boost in pet entertainment. Time to check out what's happening, as exciting opportunities for subscriptions and streaming services for pets are unfolding.

Perhaps one of the first to see potential in the field of dedicated dog entertainment were Israel-based duo Ron Levi and Guy Martinovsky who, in 2012, launched DOGTV, a 24-hour television network for dogs. This pet channel was partly taken over by Israeli production company Jasmine Group, after which multinational Discovery Communications also acquired a stake in 2014.

Dedicated dog entertainment

Despite pet parents not really understanding the concept of a TV channel for pets when it started, DOGTV's CEO Beke Lubeach says that after a decade on air, it is now "widely popular" all over the world.

So much so, that the platform boasts a wide range of programs, not just for dogs but for their owners too. Shows are divided into 3 segments – stimulation, relaxation and exposure – and include shows such as *The Dog Chef*, *Road Dogs* or *Paws for Love*.

The audience

Most subscribers to DOGTV are to be found in the US, Brazil, Portugal and South Korea. Today, the service is also available on video streaming platforms such as Roku, Amazon Fire, Android and Apple TV. The popularity of these streaming services is growing in most of the markets.

Costing \$4.99 (€4.66) a month, DOGTV's typical subscriber is an urban household with dogs that are left home by themselves during the day, without yards or other outdoor spaces.

Boosting pet parenting skills

Notably, the post-pandemic world has brought in a whole new era for pets and their parents. Since, DOGTV has introduced several dog parent programs. Lubeach notes: "The goal is to provide true value to subscribers, with expert tips, original series and valuable

information that can help them become better pet parents.” At the same time, pets enjoy the rich content available on the platform.

Last year was the company’s “strongest”, according to Lubeach. “We can proudly say that our very own direct-to-consumer platform is growing year by year. In 2022, we reached a new high of subscribers who registered for free trials and stayed on to become paying subscribers.”

All round entertainment

Streaming giants, including the likes of Amazon’s Prime Video, YouTube and Spotify have also entered this promising market, with content dedicated to entertaining both humans and pets.

YouTube offers visual entertainment to pets at @mayapolarbear. Calming pet content comprising funny challenges and autonomous sensory meridian response videos attract 2.70 million subscribers and more than 430 million views.

Also on YouTube is the popular channel @PaulDinningWildlifeInCornwall. With 648,000 subscribers and more than 477 million views, the channel produces content for cats, birds, dogs and mice that mimic real-life outdoor settings.

Amazon’s Prime Video also has videos curated to entertain pets, including *Channel Pet*, *Cat Heaven Island* and *Pet Show*.

Music to the ears

Spotify, one of the world’s largest audio-streaming subscription services with 489 million users worldwide, has also hopped on the bandwagon with content targeted at pets. *Spotify for Pets* is a curated playlist for pets that was launched in 2020. It creates personalized playlists for its user’s pets, based on the listener’s preferences, pet’s personality and type of animal.

The Swedish company conducted a study among 5,000 pet parents in the US, the UK, Australia, Spain and Italy and found that 8 in 10 believe their animals like music.

Furthermore, 1 in 5 named their pet after a music artist or band. 71% of owners admitted playing tunes for their

DOGTV’s typical subscriber is an urban household with dogs that are left home by themselves during the day.

pets, 69% singing to their companion animals and a further 57% dancing together. According to Spotify, 46% of owners believe that music is a stress reliever for their furry babies.

Spotify’s *This Is Calming Music for Dogs* playlist streams have grown by more than 330% in the US since it was introduced in early 2021.

Top searches on Spotify

- 1 Searches for **kitten**  800% increase
- 2 Searches for **puppy**  700% increase
- 3 Searches for **hamster**  700% increase
- 4 Searches for **bird**  600% increase

Source: Spotify

Stimulation

It’s not just music that is being curated for companion animals though! Other audio content is being made to foster calm and relaxed behavior in pets. In fact, scientific research recently concluded that audiobooks work better than music in reducing stress in animals.

Audible for Dogs, developed in collaboration with dog trainer Cesar Millan, claims to combat loneliness when dogs are left at home. The platform features a wide range of audiobooks for dogs with personalized introductions from Millan about their dog appeal.

In a study with 100 dogs, conducted in association with Cesar Millan’s Dog Psychology Center, 76% of dog parents who played audiobooks for their dogs described an improvement in calm behavior in their pets over a 4-week period. ♦



Jochebed Menon
Associate News Editor
GlobalPETS

Adapting to the needs of rural consumers



What action are pet retailers in North America and Europe taking to gain the loyalty of non-urban pet parents?

Pet retailers have traditionally tried to place themselves as close as possible to large urban communities, where the biggest demand is concentrated. However, amidst a reported spike in spending among non-urban pet parents, Petco recently announced its first rural concept store in the US. Various other retailers are also considering a range of options to expand their footprint in rural communities.

The potential of rural areas

Petco claims it sees “untapped potential” of \$7 billion (€6.5 billion) in the pet retailing market in the small towns of America. The US Bureau of Labor Statistics (BLS) found that the total consumer spending on pets increased by 133.9% in rural areas between 2019 and 2020, whilst pet spending in urban areas decreased by 9.4%. Even if pet food is excluded, the total expenditure on pets in rural areas still rose by 26.9% in the same period.

Another study by the University of Denver, published in the *Journal of Applied Animal Welfare Science*, concluded that rural communities had an 11.5% higher rate of overall pet keeping and a 19% higher dog ownership rate than urban communities.

Petco's approach

The Californian pet retailer Petco is strategically placing Neighborhood Farm & Pet Supply Centers at the heart of small towns and rural communities. The centers offer high-quality products and services curated for a unique market. They are expected to serve as one-stop shops for health and wellness solutions for pets as well as farm animals such as horses, cows, pigs, sheep, goats and more. The retailer launched its first rural store in Floresville, a village in Texas with just over 7,000 inhabitants. The company has not disclosed its future plans for rolling out the project in other territories.

Canada

Just over the border, Canada's leading pet retailer Pet Valu is already well established in the rural market. Around 40% of its stores are located in small villages, 40% in suburbs and 20% in urban areas.

"We have a highly localized retail strategy, enabled through over 700 small-format stores across all 10 Canadian provinces, two-thirds of which are operated by franchisees embedded in their local communities," says a company spokesperson.

Pet Valu allows its store operators to customize their product offerings to suit the needs of their customers. For example, the Canadian retailer has an expanded offering of accessories for hunting and fishing dogs in the more Northern rural markets of Canada.

"We often see greater demand for larger food bags in rural communities versus our urban stores, and so we adapt the bag-size offering accordingly," adds the spokesperson.

Fressnapf spots potential

Europe's largest pet store chain, Fressnapf, currently serves rural communities through its online channel, but it also sees the potential in expanding its own offline concept in rural environments. "We are currently in the process of developing a rural store concept that is tailored to the customer needs in these areas. We are convinced that this new concept will open up further sales potential," the company told PETS International.

In the near future, the German retailer hopes to incorporate a shop-in-shop concept offering a more comprehensive range of products and services tailored to rural customers. This concept is already in place in Fressnapf's XXL stores, which are mostly located in big cities. "We are thinking of using a smaller version of this concept as a module in our smaller stores, which are also in urban and rural areas," the company comments.

A study by Pets for Life, using information from over 67,000 people and 127,000 pets in rural communities in the US, found that a huge number of pets are being underserved in regard to healthcare. The incorporation of vet and health services is one key innovation Fressnapf would like to include in its rural concept stores.

Petco claims it sees "untapped potential" of \$7 billion in small towns.

City versus rural locations

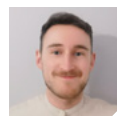
Meanwhile, Plaček, which operates 300 pet stores in the Czech Republic, Latvia, Poland, Slovakia and Romania, is also "innovatively tackling" the rural market. It opened a 24/7 Super zoo store in Týn nad Vltavou, a municipality with 8,000 inhabitants south of Prague, just a few months ago.

Consumer behavior is one of the biggest differences between pet stores in big cities versus rural communities. Despite the reported increase in overall pet spending in rural locations across the US, the companies interviewed said they find customers living in rural areas still spend less than their urban counterparts. "Customers living in big cities spend an average of 30% more than customers living in rural areas. We think this is because they are more aware and engaged with their pets at home than when they are out in the garden or on their land," says a spokesperson for Plaček.

Distance

The distance traveled by the customer is another factor worth considering. One benefit is that isolation in rural areas means competition can be slim. The stores interviewed said their main competition generally comes from supermarket chains, giving them a significant advantage in terms of product range.

Also, whereas city stores benefit from more frequent walk-in customers, customers in rural locations are more likely to have to drive. This opens opportunities for the expansion of the product range in rural locations. At Pet Valu, they capitalize on this by expanding the trade areas of their stores. However, the Canadian retailer points out that rural pet stores fall short in terms of online-generated sales. Fressnapf agrees, highlighting the availability of omnichannel services in urban versus non-urban areas as a key difference. ♦



Joshua Horritt
PETS International Contributor



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UK, Ireland and Australia

As economic challenges impact pet ownership in the UK and Ireland, we present the latest market and consumer trends in these countries and some upcoming regulations. With nearly 7 out of 10 Australian households owning a pet, what are local consumers' demands? And we have a chat with the CEO of Australia's largest online pet retailer, Pet Circle.

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Pet populations are stagnating while competition gets fiercer

As pet owners look for the best ways to care for their pet – despite the current financial challenges – retail channels are doing their utmost to provide benefits for their customers.

After the pandemic upswing in adoptions, current growth in UK pet populations is much steadier. In 2022, there were estimated to be 19.3 million dogs and cats in the country. This was approximately 100,000 up on the previous year. The 19.2 million population in 2021 was some 200,000 more than the year before, and in 2020 the number was 19 million – an increase of no less than 1 million compared to 2019.

Some owners have been forced to give up their pets as the cost of living rises. The large dog population declined by 1% last year. Reptiles and fish were also greatly affected, due to the increased cost of maintaining their habitats. Continued growth is, however, expected in smaller dog breeds, cats and other small mammals.

Meanwhile, online sales are spiking, as consumers look for affordable prices and industry players battle to increase their customer base.

Coping with price increases

Pet care prices rose by up to 11% over 2022, driven by supply chain issues and climbing input costs. Meat

and poultry make up roughly 50% of the cost of pet food ingredients and have been among the hardest-hit commodities.

As their spending power declines, most consumers have responded by cutting back on non-essential items, trading down to more affordable options, and looking for promotions. One example is buying larger-sized packs of dry pet food. This kind of food is also better suited to the increasingly busy lifestyles of many British pet owners.

Pet humanization is still boosting premium pet food growth, despite the unparalleled price increases. With more consumers wanting the best for their pets, many simply refuse to trade down, even if times are hard. So brands such as Lily's Kitchen and Naturo are capitalizing on this renewed interest in health and nutrition, and that is boosting value growth in dog and cat food.

E-commerce plus bricks and mortar

A recent development in the UK is the steep rise in pet care sales through e-commerce platforms. This is driven by both the growing segment of younger



Inspired by Nature
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Good Health starts
with Good Gut Health



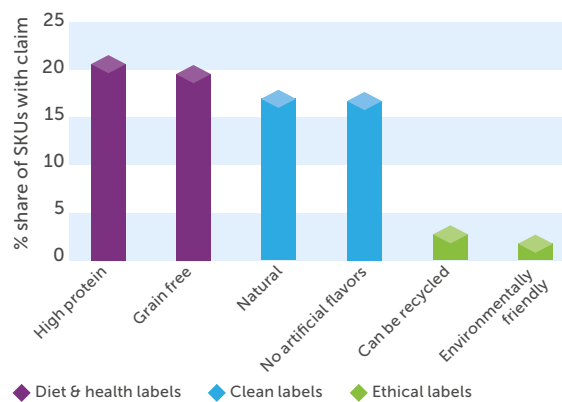
pet owners and the growing confidence of older generations to make purchases online.

Convenience plus the simplicity of comparing prices and finding good deals are only some of the reasons for this online expansion. And despite these advantages, consumers did return to bricks-and-mortar retailers in 2022, seeking lower prices at discounters, or broader ranges, availability and guidance at pet specialist retailers.

Experienced shop staff are important for the many people who adopted a pet for the first time during the pandemic and need advice on nutrition and pet care. Specialist retailers also saw less downtrading than other retailers, due to higher brand loyalty and consumer awareness. And e-commerce does have its limitations, such as product availability or high delivery fees, which have held back that channel's growth to some extent.

Natural and sustainable as future pockets of growth in the UK pet food space

Pet food – share of SKUs with claim, UK, 2021



Beating the competition

As offline retailers and e-commerce platforms battle it out, what aspect of their propositions will make the difference for pet parents?

From a convenience perspective, e-commerce wins easily. The consumer benefits from increasingly fast delivery, combined with the opportunity to browse and find promotions and better deals. Another advantage

- ✓ Digestive and Gastro Support
- ✓ Scientifically Proven Formulations
- ✓ Trusted by Veterinarians
- ✓ Loved by Pets



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is the subscription models on offer there, allowing recurrent purchases of essential pet nutrition. And as larger bags increase in popularity, home delivery means consumers can avoid carrying heavy and bulky packs.

In terms of consumer experience, while pet specialist retailers do provide a level of guidance through educated staff, e-commerce platforms are catching up. Many online retailers are implementing easily accessible information to guide the consumer, or even live chats to mimic what happens in-store. Poppy's Picnic, a British raw pet food brand, even places QR codes on in-store refrigerators which redirect consumers to the company's website and live chat function. Their customer service agents can then engage with the customer directly, giving them advice and guiding them through the purchase.

Personalization

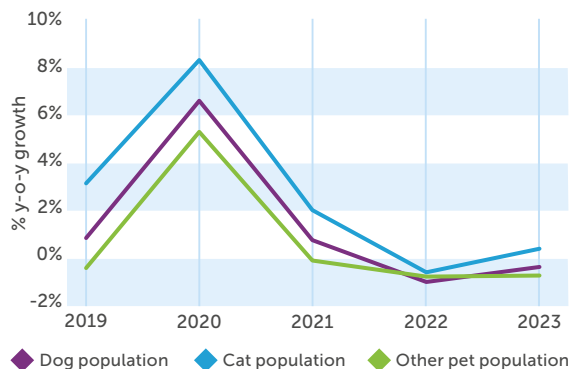
E-commerce does remain a true disruptor, as digitalization allows faster and more efficient innovation. Tailored nutrition lets e-commerce platforms tap into the personalization trend, adapting nutrition to breed, age, and even pet-specific characteristics. Butternut Box, for example, allows owners to personalize their subscription according to their pet's preferences and levels of activity.

How the future looks?

From 2024 onwards, as the British economy and unit prices are likely to stabilize, the pet care market – including humanization and therefore premiumization – is expected to continue growing, although at a slower pace. As a result, the total UK pet care market is forecast to expand by a compound annual growth rate (CAGR) of 1.4% in value terms from 2023 through 2028.

Premium therapeutic dog and cat food, including cat and dog treats and mixers, and pet healthcare are expected to continue driving value growth. The 2023-2028 CAGR forecast for pet food is therefore 5% in value terms, highlighting the growing focus on nutrition, well-being and preventative health.

Pet population growth by pet – UK, 2019-2023

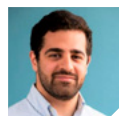


Source: Euromonitor International

Natural and insect-based

Humanization and premiumization trends are going to boost the growth of natural, less processed pet foods too. Claims such as 'Natural' and 'No Artificial Flavors' are increasingly common on pet food products. Similarly, 'High Protein' and 'Grain Free' dominate the segment, appearing on roughly 20% of pet food products in the UK in 2021. So the market for clean and dietary labels appears to have established itself, but still has more potential. On the other hand, the sustainability space remains undeveloped, despite growing demand, with 'Environmentally Friendly' claims at just 1.6%.

The alternative protein sector, with brands such as Yora and Mars Petcare's Lovebug offering insect-based protein pet foods, is expected to grow at a fast pace. Fermentation and mycoprotein are also promising additions to the pet food market. ♦



Tommaso Cappato
Food and Nutrition Research Analyst
Euromonitor International



Spotlight on the UK pet food policy environment

Expectations are that the UK pet industry will have to cope with some major industry regulations this coming year. Environmental policies, especially, will be the center of attention.

Whilst we are navigating inflation, cost of living, energy prices, ingredients availability, climate change and sustainability issues, the industry is thinking ahead to ensure that safe, sustainable, nutritious and affordable feed remains available for all pets in the UK.

Retained EU law

To prevent holes in its legal framework following Brexit, EU law was transposed into UK legislation. These laws are set to expire on 31 December 2023. A priority for the UK pet food industry is therefore now to ensure any legislation critical to pet food safety is upheld. Much of the retained EU law is key for business in the domestic market, as well as to allow the UK to continue to export to the largest market on its doorstep.

Trade policy

The UK is a proud champion of some of the highest feed safety and animal welfare standards in the world. As the industry continues to negotiate trade deals, it is essential such standards are upheld. Reason why the UK government must stop undermining these standards by doing deals that allow imports produced with lower standards.

Farm policy

Food security is set to be a top priority this year. The UK needs an agriculture system that produces enough raw materials for its needs – around 0.5 million tons of cereals and the same volume of animal by-products – in a sustainable and high-welfare manner.

UK Pet Food is looking to the government to flesh out the Environmental Land Management Scheme. A recent development includes the Sustainable Farming Incentive scheme where farmers can receive additional funds for sustainable, climate-friendly farming. Such developments are key to helping the government achieve its newly established statutory environmental targets.

The UK needs a healthy, resilient food system that also recognizes the pet food industry for the role it plays in the agri-food supply chain.

Extended Producer Regulations

The aim of the Extended Producer Regulations is for producers to pay the full costs of managing and recycling the packaging waste they produce. This will help to drive further circularity of packaging by reducing unnecessary and difficult-to-recycle packaging.

UK Pet Food fully supports the aim to reduce the environmental impact of packaging. There are efficient and cost-effective ways to do this. Reason why the organization calls on the government to implement a new system that will be cost-efficient and drive whole system change, including an overhaul to the recycling infrastructure and addressing how councils manage waste collections. ♦



Nicole Paley
Deputy Chief Executive
UK Pet Food

Offline sales are still in the lead despite promising e-commerce trends

Irish consumers are spending more than ever on their pets, creating new business opportunities, particularly at the top end of the market.

The Emerald Isle is home to an estimated 355,000 cats (up from some 325,000 pre-pandemic) and just under half a million dogs (up from about 450,000 pre-pandemic), according to Euromonitor International. Despite a cost-of-living crisis that is chiefly impacting low-income families, pet owners are sparing no expense when it comes to providing for their animal companions.

Boom in an already strong market

In 2022, Irish pet parents spent an estimated €239.3 million (\$255.9M) on looking after their animals. According to Euromonitor, €158 million (\$169M) was splashed out on pet food and a further €81 million (\$86.6M) on various pet care and leisure products. This marks a boom in an industry that has gone from strength to strength in the past 5 years.

While market growth had already been rising steadily between 2017 and 2019, the COVID-19 pandemic

created an insatiable public demand for pets, resulting in unusually high levels of growth across the industry... and the rise continues.

Pet food in Ireland (retail value, in €)



Source: Euromonitor International

In 2020, the pet food market in Ireland grew by 4.3% with a yearly expenditure of €155 million (\$165.8M) on pet food (up from €148M / \$158.3M in 2019). Pet food sales plateaued in 2021, then grew again last year by an estimated 2.1%. Even more strikingly, consumer spending on non-food pet items increased by 8.2% to €80 million

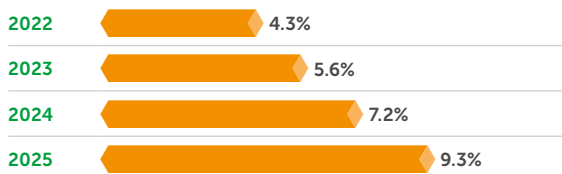
(\$85.6M) in 2020 (€6M / \$6.4M more than in 2019). This section of the market shrank slightly in 2021, before returning to rude health in 2022 with around 4% growth.

Preference for bricks-and-mortar stores

Most Irish people buy the food for their pets in bricks-and-mortar supermarkets such as Tesco Ireland, Supervalu and Dunnes Stores, according to Brendan McLoughlin, General Manager at Mars Ireland.

Specialist pet trade outlets, which number about 200 in Ireland, are the second most popular option. This market mostly consists of medium-sized and large chains such as Maxi Zoo (29 stores), Petmania (15 stores) and Petworld (10 stores), along with some privately owned individual stores. Maxi Zoo opened a number of new stores in Ireland last year and Petworld is also said to be looking to expand. In Cork alone – a relatively small city with a population of 222,000 – there are more than 20 pet stores.

Pet food online channel (market share)



Source: Statista

Rise of e-commerce

It is believed that only 14% of pet parents are currently buying pet food online, but e-commerce revenue in Ireland is rising, according to Nestlé research. Statista reports that online sales of pet food in the country accounted for €3.8 million (\$4.1M) in 2022, with that figure expected to jump to €5.6 million (\$6M) this year and more than double to €12.4 million (\$13.3M) by 2027.

McLoughlin notes that e-commerce “drives the most absolute growth” in the pet food market and the post-pandemic growth continues to be in double digits. Amazon and Zooplus are currently the biggest online players in Ireland. While the importance of the online operations of local retailers is said to be increasing, “nothing has dropped in terms of footfall because people are still after the experience in the store,” according to another senior retail insider.

Local manufacturers

The main local pet food producers are C&D Foods (part of the ABP Group), the Co. Kilkenny-based Connolly’s Red Mills, Irish Dog Foods Ltd (part of the Queally Group) and Linhurst Manufacturing in Navan, Co. Meath. Linhurst makes natural pet treats, mostly for export to mainland Europe, the US, Canada and the UK.

With only a handful of manufacturers of pet-related products in Ireland, pet food is imported into the country from all over the world. In 2021, €140 million (\$149.7M) worth of pet food imports (in wholesale value) reached Irish shores, mainly from the UK (almost €40M / \$42.8M), Germany (nearly €18M / \$19.2M) and other European countries, according to Ireland’s Central Statistics Office (CSO). Exports from China accounted for €10.4 million (\$11.1M).

Optimistic forecast

The Irish pet food market is expected to grow by 5.45% annually in the next 5 years, according to Statista. Joanne McKenna, Category Country Manager at Nestlé Purina PetCare Ireland, predicts that online sales and subscriptions will continue to increase in the long term. Pet food is “one of the least likely categories that shoppers will spend less on,” she adds.

Despite inflation, premium products are also seen as an opportunity. Although some lower-income families are taking up economy options amid the cost-of-living crunch, the mid-market is in decline, creating many new possibilities to launch premium pet care ranges in Ireland.

However, if the costs of raw materials and energy keep rising, then “the premium end of the market could fall backward, as owners won’t be able to afford the food,” cautions Nigel Baker, CEO of the UK-based Pet Industry Federation. Other industry sources point out that Ireland faces an extra challenge due to the ever-increasing cost of transporting goods from overseas. ♦



Paul Caffrey
PETS International Contributor

Zooming in on the boom in pet ownership



With nearly 7 out of 10 Aussie households owning pets, it is time to look at the trends in consumer behavior, product demand and expenditure.

Australian pet ownership rates remain high, with around 6.9 million households owning 1 or more pets. Australians now have an estimated 28.7 million pets in total, outnumbering the country's human population of 25.8 million.

Pets in Australia, commissioned by Animal Medicines Australia (AMA), is the country's most comprehensive pet population survey, with findings from nearly 2,500 households. The 2022 report confirms the observed growth in ownership that occurred during the pandemic.

More demand, higher prices

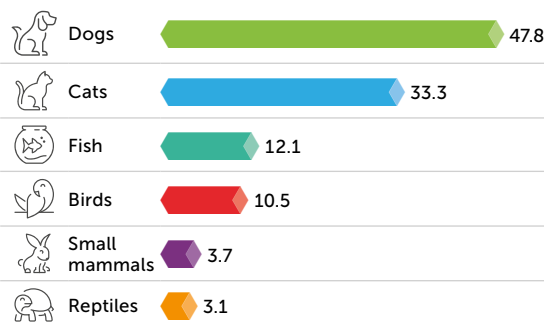
Australia's pet populations grew strongly during the pandemic. In 2022, ownership rates were significantly higher than the consistent 61% ownership rate recorded in 2016 and 2019, and comparable with figures recorded in 2021 (69%).

Dogs remain the most popular pets, with a population of 6.4 million, and almost half of Australian households have at least one dog. Cats continue to be Australia's second most popular pets, with 5.3 million.

Increases in demand have created challenging conditions for pet breeders and resulted in record-

high purchase prices for households acquiring pets. The average price for a dog in 2022 was A\$1,793 (\$1,235 / €1,156), almost double the A\$930 (\$641 / €600) paid prior to 2020. Similarly, the average reported price for cats doubled to \$804 (\$554 / €519) in 2022.

Pet ownership – household penetration (%)



Source: 2022 Pets in Australia, AMA

Food accounts for half of spending

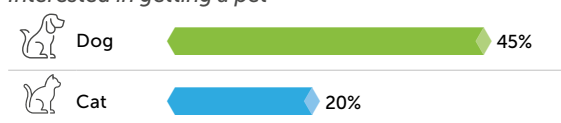
Expenditure rose to an estimated A\$33.2 billion (\$22.8B / €21.3B) last year. Food represents 51% of total spending, followed by veterinary services (14%), pet products and accessories (9%) and pet healthcare products (9%). The remainder of the total spend is attributable to services such as clipping and grooming

(4%), pet insurance (3%), and training, behavior and therapy services (3%).

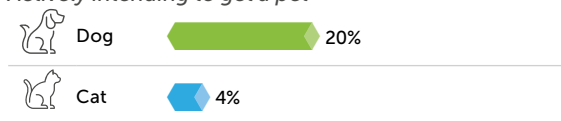
Vets remain the most trusted source of advice, with 84% of dog owners and 69% of cat owners taking their pets to the vet in the last 12 months – mostly for general check-ups and vaccinations. However, 68% of pet owners say they had considered not going to the vet when they needed to, driven partly by cost considerations.

Non-pet owner potential

Interested in getting a pet



Actively intending to get a pet



Source: 2022 Pets in Australia, AMA

Types of pet parents

The research identified 4 distinct pet ownership segments by further exploring the data for demographics, personal circumstances, attitudes and behaviors.

The largest cohort (30%) are driven by 'affordability & convenience'. These owners are less likely to spend money on non-essential items. The second cohort (25%), many of whom are retirees and empty nesters, are looking for 'simplicity & reliability' to maintain a happy and well-cared-for pet companion.

'Care & quality' are key drivers for the third cohort (27%). These are generally families with middle to higher incomes who are willing and able to spend money across all pet products and services, including preventative care.

The fourth cohort, 'appeal & reassurance' (19%), are driven to care and share experiences with their pets, even if it means stretching the budget. These owners are often more likely to have more pets, and present the greatest opportunity for further education on keeping their pets healthy and happy.

Increases in demand have resulted in record-high purchase prices of pets.

Ownership experiences

For many pet owners, typical reasons for getting a pet include companionship, wanting to rescue an animal, relaxation and mental health, with 85% saying their pet had a positive impact on their physical and mental well-being (88% in 2019). The 3% who feel that pet ownership has impacted them negatively tend to refer to the costs of caring for pets, the level of cleaning required, the time and responsibility demands, and limits on their ability to travel and be spontaneous.

Pet owners are staunch advocates of the benefits of pet ownership. Around 59% are 'Net Promoters' and likely to recommend pet ownership and its benefits to friends or family members. In addition to the physical and mental benefits that pet owners regularly mention, this report also highlighted the social benefits of pet ownership, as pet owners noted the opportunities for social engagement with others through dog parks, casual encounters and club participation.

Non-owners and previous owners

Despite the growth in ownership, housing constraints and costs are key barriers holding back would-be owners and current owners hoping to access the benefits that come with pet ownership. Current non-owners – particularly renters and apartment dwellers – are especially likely to point to unsuitable homes or issues with landlords, legal bodies and residential laws as a reason for not bringing a pet into their lives.

Noting post-pandemic anecdotal reports of increases in pets being given up for adoption, the 2022 report sought to develop a baseline to track trends in pets being given up. While it is too early to identify any trends, or identify causal factors that may increase the risk of this happening, the report notes some aspects that may benefit from further investigation in the future. ♦



Ben Stapley
Executive Director
Animal Medicines Australia (AMA)

The changing regulatory landscape in Australia



New rules on imported pet foods and state restrictions on the sales of animals by specialized retailers have entered into force 'Down Under'. How's the industry coping with it?

Australia, the most populous country in Oceania, recently approved new rules that regulate the pet business. Welfare claims and the high biosecurity risks of pet food coming from third countries are behind the new policies.

Extra measures

Since 31 October 2022, imports of fish derivatives of salmonid origin for use as pet food must be heated to a minimum of 85°C for 25 minutes or more. Similarly, pet food containing fish derivatives of non-salmonid origin should be heated to a minimum of 85°C for at least 15 minutes, according to authorities.

Additionally, the revision of Australia's Biosecurity Act requires every consignment to be packed in clean and new packaging and be free of Biosecurity Risk Material (BRM) before arrival into Australian territory. Furthermore, importers and pet food retailers are no longer allowed to order unregulated pet food from overseas for delivery by mail.

Stricter conditions

The Australian Department of Agriculture, Fisheries and Forestry issued a notice that any pet food arriving in

the country without complying with these new import conditions will be destroyed. The conditions include the requirement to provide relevant documentation within 14 days and for all ingredients in the product to be clearly specified on the label.

A spokesperson from the department told PETS International that unregulated animal-based pet food presents a "high biosecurity risk" due to the possible presence of pathogens. According to official figures, pet food without relevant documentation accounts for the largest proportion of animal products intercepted in the mail. "In 2021, these goods comprised 38% of the total animal products detected," said the spokesperson.

Reduced risk of animal diseases

The Australian Veterinary Association (AVA) welcomes the new restrictions as a way of reducing the risk of disease among animals. "It's excellent to see new biosecurity measures put in place to control the risk of disease," stated Bronwyn Orr, President of the AVA. The association believes that all pets in the country should have access to safe, high-quality food and, if a problem arises, there should be a prompt and regulated recall and investigation.

How will it impact the industry?

The new regulations are not expected to impact on companies exporting pet food to Australia or on local retailers who comply with the country's trade guidelines. The Australian government emphasizes that the import conditions themselves have not changed. The only thing that has changed is how goods that fail to meet the import conditions are dealt with.

According to Carolyn Macgill, Executive Manager at the Pet Food Industry Association Australia (PFIAA), the new rules are only aimed at tackling the biosecurity risks presented at the border. "Several of our members are engaged in cross-border trade and this change has not impacted their ability to import pet food," she concluded.

More legislation

Elsewhere, authorities in Canberra recently tightened federal rules relating to the import of dogs and cats into the country. From 1 March 2023, only cats and dogs from approved countries are allowed in.

Additionally, last November, the Legislative Council in the state of New South Wales passed the Companion Animals Amendment (Puppy Farms) Bill, which seeks to regulate the conduct of businesses breeding companion animals. Some of the bill's provisions include prohibiting owners from having more than 10 fertile female dogs or 10 fertile female cats, and banning the sale of pets that are not from welfare homes to retailers.

It also requires breeders to be registered and regularly inspected under the law to improve oversight and traceability of breeders. Responsible breeding association DOGS NSW warns that if this law is adopted, the price of puppies and kittens in the province could skyrocket. The bill must first be given the green light by the lower house before becoming law. ♦



Jochebed Menon
Associate News Editor
GlobalPETS



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Nature's Best AUSTRALIA

From little things big things grow



Australia's most vertically integrated pet business is expanding its export market.

Over 35 years ago, company founder Jason van Peelen started breeding fish in his garage in Tasmania to supply local pet stores. From these humble beginnings, the company now operates 2 manufacturing sites and 3 warehouses covering distribution right across Australia. Nature's Best is part of the Pets Solutions International group of companies that also encompasses a retail network (Pets Domain with 65 stores) and an aquatic division (Aquarium Industries and Aussie Fish Aquatics).

Sustainable manufacturing

The company's 2 manufacturing sites located in Tasmania are powered by

hydro energy. They make a wide variety of products: from food and treats for birds, poultry and small animals under the Peckish brand, to Tidbits-branded dog biscuits and aquarium water treatments under the Aquasonic brand. The company's focus is to maintain the nutritional integrity of the raw ingredients by using gentle manufacturing processes like cold-pressed extrusions and stone milling its own Australian-grown wheat flour.

Nature's Best has made a considerable investment in automation and equipment in recent years to keep up with the growing demand for its products. In addition to

manufacturing its own brands, several other private label products are made in-house to meet client requirements.

Alongside manufactured lines, Nature's Best has designed an extensive and ever-growing fashion brand called Dan & Sam, specializing in stylish walk wear, apparel and accessories for dogs and cats.

Exports

"Products made by Nature's Best can be found in over 1,500 outlets across Australia," says the company's Chief Operating Officer, Chris Worthington. "We currently export products to 3 other countries but are now looking to open up our distribution across a broader export market."

Zoomark

The company will be exhibiting at its first international trade show, Zoomark, later this year. "Come and look for us in Hall 25, Booth B73-B77. We might even have some nice Australian treats on hand for you to try," states Worthington. ♦



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Michael Frizell,
CEO and Co-founder
of Pet Circle



“I bet on getting the right product quickly, not the wrong product quickest”

The leader of the Australian online pet retailer discusses the challenges the sector is facing, and how Pet Circle is preparing logistically to cope with the increased demand for faster delivery.

Pet Circle accounts for 60% of the total online pet market in Australia and it believes that the local market still has room to grow by up to 500% in the coming years. The Sydney-based e-commerce retailer, which currently serves 800,000 customers, aims to hit the 1 million mark within the next 5 years. And if there is customer demand for it, the company will consider opening its own physical stores nationwide.

Sales increased substantially in 2022, varying by product between 20% and 30%. And contrary to the trend in other Western markets, “solid double-digit growth” is the company forecast for the next 5 to 9 years.

How’s the Australian pet industry doing?

Overall, the industry has been very strong for the past 3 years. While the rest of the world is seeing a slight

decline in the non-essential categories, our market is looking pretty robust. All our sales, including those categories, are growing and there’s not much of a gap with the growth that we see in food and consumables.

Why this different trend?

Europe and the US are suffering from a much higher inflation than ours, and consumer confidence there is lower than here. Inflation in the pet food category in Australia has not reached 10%, and the discretionary category is even lower.

Do you see any change in consumer behavior?

We are starting to see some customers trade down a little in food, but it is not a huge trend for us yet. We’re still not seeing any of the low-cost brands significantly accelerate on our platform. ► [SEE NEXT PAGE](#)



Do you expect a change anytime soon?

I believe towards 2024 we will have an issue with interest rates impacting on mortgages and home ownership, and this will affect pet parents. In the next 12 to 24 months, I expect more demand for private labels, and this category will grow as consumers look for quality products at more competitive prices.

You have 10 or more private label brands. Are you planning to expand that range in the near future?

I think so. There will be more gaps for us to fill as there is more consumer change. The more consumer behavior changes, the more gaps there are.

What's behind the recently announced multi-million dollar investment?

We raised A\$125 million (\$86.5M / €80.1M) and invested this into building a faster delivery service, expanding our warehouses from 20,000 sqm to 60,000 sqm, and growing our range, which is twice the size of our nearest competitor. We now have sites in Sydney, Brisbane, Perth and Melbourne, and we have built a fleet to get deliveries to the customer 7 days a week. We have also made a reasonably large investment in making sure we have the right advice for our customers. We have 30 registered vets on staff, 24 hours a day, who can give advice to any pet owner in the country.

You have reduced delivery times to 1-2 days.

Is same-day delivery the next step?

Absolutely. When we launched the business 12 years ago, 4 days was fine. Now 1 day is convenient, but we will soon be launching delivery on the same day.

The question is: how much do you pay for consumer value? There are some players that deliver generic pet food brands in 15 minutes. I bet on getting the right product quickly, not the wrong product quickest.

What can you tell us about the customer journey on your platform?

On average, we get between 6 and 7 purchases a year from each customer. Most of our customers are quite loyal, especially cat owners. It doesn't mean they're the most valuable, but they're the most loyal, as they make the most repeat purchases and stay for a long period of time. They also buy a lot, about every 2 weeks. The premium engaged dog owner usually makes fewer purchases and it is more sporadically.

Australia's largest retail group has recently entered the pet industry with the acquisition of 55% of the retail chain PETstock. What will be the impact on the sector?

I think it's a good thing that the industry has a large well-funded player interested in getting high-quality products to customers. Competition in the market is good for our customers, as it makes everyone better.

You have a strong presence in big cities. What about less populated areas?

Between 70% and 80% of our customers do indeed live in urban areas. While we are doing a good job in the 5 biggest Australian cities, we are not as good at a regional level. The demand for premium food in cities is slightly bigger than in the rest of the country. In the city, we get more food orders, while regionally we send more toys, treats, accessories and medications.

"We are starting to see some customers trade down a little in food, but it is not a huge trend for us yet."

We haven't built our own supply chain to serve all the regional areas, and we will not push hard into regional until we really believe we're doing a better job than the physical shop in that local area.

What are the opportunities for growth?

The Australian pet market has phenomenal growth ahead of it. We have a big pet population and average spending is high, so the macroeconomics are very good. But some of the fundamentals, like mass versus specialty, are still lagging behind the rest of the world. And that humanization trend you see in the rest of the world will get here too.

And what about expanding your footprint outside Australia?

We always talk about being great before you get big. Our vision is not to be the biggest pet company in the world; our vision is to be the best. We spend a lot of time making sure what we build in this country is truly great, and there are lots of layers to that. We want to be great and then we'll take that overseas. Right now, our main focus is Australia. But eventually, we will go beyond Australia.

What's next for Pet Circle?

Our main focus is to do the same thing we've done in the past, which is to understand customer needs. Consumer expectations around shipping quality and speed are changing; we will need to be faster and better. We are launching an app soon where customers will be able to place their orders, manage auto-deliveries, and access our vet advice tool. We are also spending a reasonably large amount of money on data, to know how we give the right product to the right pet, which is different from getting the right product to the right customer. That's probably an evolution we will see over the next 12 to 18 months. ♦



David Palacios Rubio
Head of Editorial
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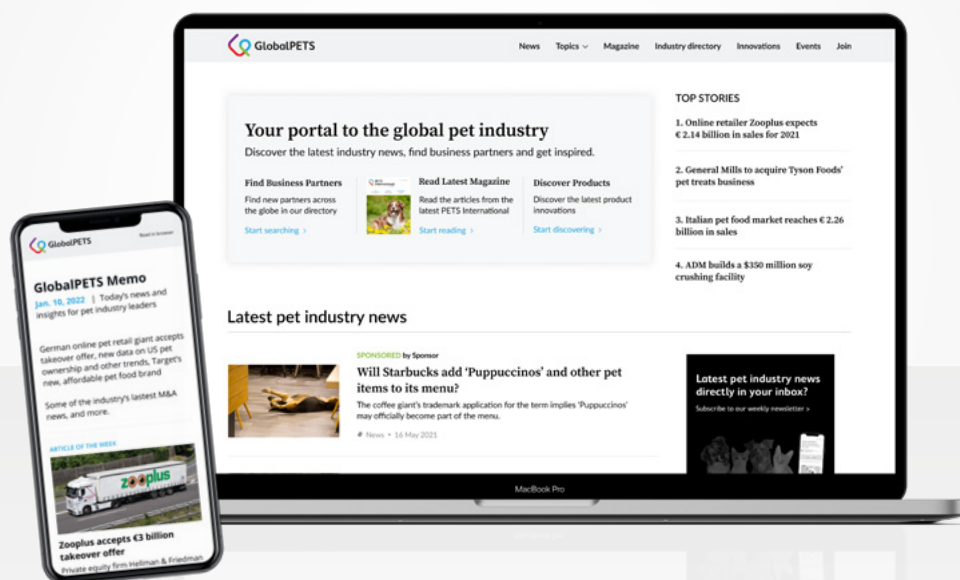


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