



# PETS International

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## Pet food

Year of the Salmon,  
impact on pet food.

## Accessories

The influence of innovation,  
technology and humanisation.

## Southern Europe and Russia

Latest trends and  
market figures.



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## Highlights this issue



10

### Accessories

E-commerce, humanisation, and IoT take traditional shopping experiences and products to the next level.



26

### Pet food

Why do we see an increasing popularity of salmon and other fish in pet food? And what about the usage of grain and pure products? Let's find out!



40

### Pet food and ingredients

Informed consumers demand top quality food. What ingredients are pet owners looking to see on the label?



60

### Southern Europe

The 'pet industry landscape' in Southern Europe is rapidly changing. Let's see how and why by looking at the latest facts and figures on Italy, Greece and Spain.

## And further in this issue

Editorial .....	3	Marketing .....	86
Upcoming issue .....	5	Calendar of events   Contact us .....	95
Pet industry highlights .....	6	Advertisers index .....	96
Russia .....	78	Colophon .....	96



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# The pet industry is on the edge of major changes!

With Zoomark around the corner, we have decided to make the Southern European market a core topic of this edition. Expect to dive deep into the latest trends of the Italian, Greek and Spanish pet market.

This year started off with 2019 being internationally declared as the Year of the Salmon. On a yearly basis, 2.5 million tons of salmon are produced via fish farms. Marine fish with omega-3 is a favourite ingredient in pet food and snacks, as well as in human food. The salmon industry is preparing to meet the needs of animal and human consumers with an increase in production, but in a sustainable way. New technology is helping to utilise the entire fish, for pet food, which can help reduce the competition with human consumption industries for the ingredient. These advances are just the beginning of new alternatives getting attention, such as vegetables, krill, and algae.

Sustainability continues to be a thread throughout the pet industry. David Primrose's article (page 46) breaks down the UN FAO sustainable pet food requirements and the Danish model. Leaving us to wonder, is the industry willing to cooperate on a wide enough scale to implement pet food sustainability for the next decades?

Sustainability regulations can be seen as critical with more pet owners coming into the market. Looking in-depth at the current client behaviour, we can

see humanisation of pets is one of the biggest trends and client attitudes force innovation in the accessory segment.

Have you ever heard of JOMO? It stands for 'the joy of missing out', and implies that you should enjoy your time at home away from it all and take time to relax. Especially with your pet, who also loves to relax and cuddle with its owner at home.

Startups and traditional businesses are taking this new attitude of humanisation by pet parents and implement it into their offerings, using apps and big data to innovate the way consumers are connecting to their pets. This makes the relationships between pet owners and their 'pet babies' closer than ever before.

In-person experience is still important to consumers, who want to have activities and fun places to go with their pets, however, online sales are also growing exponentially. We can also see this in the very interesting Russian market, which is gaining traction in the pet e-commerce space. What are the opportunities there? What can you expect from the upcoming ParkZoo in September?

Get informed and inspired.



Corine van Winden, CEO



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# CIPS 2019

November 20-23, 2019

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Ms. Becky Liu  
Tel: +86-10-88102253  
Email: liuding@chgie.com  
Fax: +86-10-88102251

Ms. Lisa Pang  
Tel: 86-10-88102346  
Email: panglx@chgie.com  
Fax: +86-10-88102243

Ms. Ann-Christin Hoyer  
Tel: +49 9 11 86 06-86 16  
Email: Ann-Christin.Hoyer@nuernbergmesse.de  
Fax: +49 9 11 86 06-12 86 16

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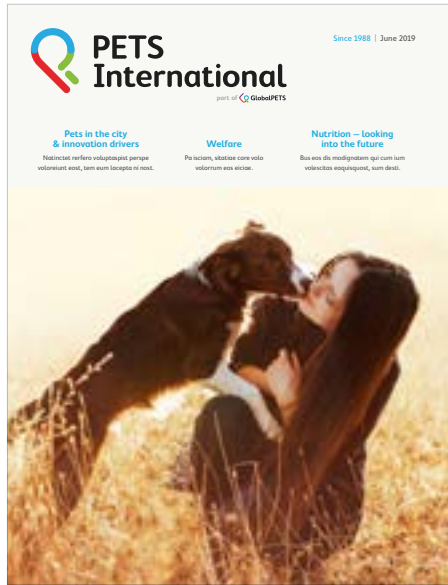
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**Concurrent Activities:** CIPS Innovation Award; GlobalPETS Forum (Asia); China Import Pet Food Symposium;  
CIPS Global Ornamental Fish Championship; CIPS Global Grooming Conference & Championship, etc.

Upcoming issue June 2019



**Welfare**

**Nutrition – looking into the future**

**Customer & pet needs in the big cities**

**Humanisation and pet welfare**

**Modern pet ownership & pet parents**

**Homemade diets**  
**Pets in the city & innovation drivers**

**Millennials and the pet market**

Upcoming issue | Advertising deadline: 19 April 2019 | Publication date: 31 May 2019

Contact head office (see page 96) or local representatives (see page 95).



## Pet industry highlights



**PLMA 2019**  
**World of Private Label**  
 21 - 22 May 2019  
 RAI Exhibition Centre  
 Amsterdam, The Netherlands  
[plmainternational.com](http://plmainternational.com)



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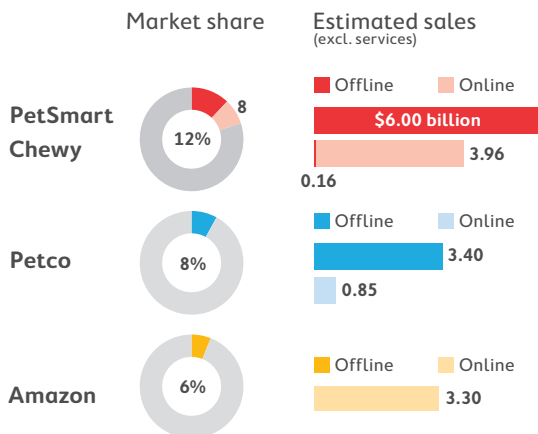
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**Aquarama**  
 31 May - 2 June 2019  
 Guangzhou Import & Export Fair Pazhou Complex  
 Guangzhou, China  
[aquarama.com.cn](http://aquarama.com.cn)

### Turnover Amazon in pet food & accessories

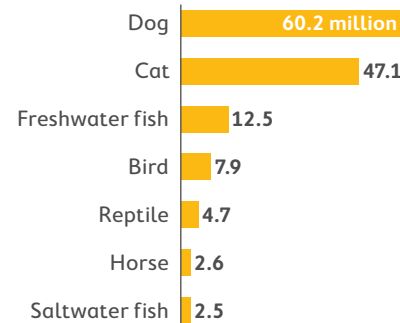
Amazon is holding a 6% and Chewy a 8% market share in the US pet food & accessories market. Packaged Facts recently shared the figures.

In 2018, the pet industry was a bright spot in retail, sparkling growing competition from online players.



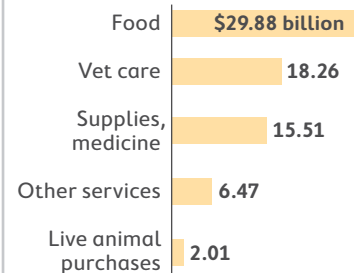
Source: Packaged Facts

### Number of US households that own a pet



Source: American Pet Products Association

### Estimated sales by type of product



### Roger Mugford, Company of Animals, will change roles

Company of Animals founder and CEO, Dr Roger Mugford has announced he will change positions within the organisation this spring. In addition to being a board member of Company of Animals he will start a new venture, Animal Insights Limited. Animal Insights will be the innovation driver for new products and services, based on animal behaviour and training.

Former operations director Paul Nolan will be the new CEO. He has been with the Company of Animals since 2011 and his track-record of building high-performing teams, creating positive cultures and his strong vision for the company's future is why he will be entrusted with leading the organisation.

## Pet industry highlights

### Pet Sustainability Coalition expands to Europe and unveils European consumer insights

The Pet Sustainability Coalition is expanding its Positive Impact Program to Europe for the first time at Zoomark 2019. The Positive Impact Program drives recognition of companies who actively measure, verify, and improve their environmental and social impact, by using a third party, globally recognised sustainability performance assessment.

Zoomark attendees can also expect to see an enticing presentation that unveils what European consumers require and expect from sustainable pet products.

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



### Kemin partners with Chinese biotech company



Kemin Industries has struck a partnership with CRVAB Bio-technology Co., Ltd., an enzyme producer for the feed industry based in Chifeng, Inner Mongolia, China. The partnership will allow Kemin to expand globally in enzyme production and add fermentation capabilities to their repertoire.

Kemin is working on a new product portfolio including single and blended enzymes, as well as a probiotic product pipeline. Access to their new partners fermentation facilities will allow Kemin to directly control its enzyme production and provide higher quality solutions to its customers.



### First innovation lab focused on new health technologies for pets

Israel-based equity crowdfunding venture capital firm OurCrowd has teamed up with Asia-Pacific pet store operator PETstock and Qure Ventures – OurCrowd's digital health fund – to set up Israel's first innovation lab focused on creating new health technologies for pets. The hub will be called Pet Health Innovation Labs (PHIL), and is taking aim at the growing field of digital health technologies for pets.



### Mars Petcare is introducing the Leap Venture Studio

Leap Venture Studio has announced a partnership with Mars Petcare and the Michelson Found Animals Foundation, a non-profit dedicated to keeping animals in their homes, to launch a startup-centric accelerator program focused on innovation in the pet ecosystem.

The project represents Mars Petcare's commitment to leveraging a wide spectrum of products and services to make 'A Better World for Pets™'. Every year six promising startups will be selected that could end up receiving up to \$200k (€175 k) in investment. The selected startups will begin with a product and brand assessment, during which the companies' strategic needs are identified so they can start to design a product/market impact plan. Startups will then work with a custom team of consultants that will help them with the execution of the plan.

For further information: [leapventurestudio.com](http://leapventurestudio.com)





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**Reserve 19 to 23 November 2019 in your agenda for an in-depth week of pets! To kick off, attend the fifth edition of the GlobalPETS Forum Asia in Shanghai, followed by the CIPS and the 'Pet Retail Tour'.**

### **Booming market**

Although the economic growth of China is slower than we are used to, the Chinese pet market is still booming. Consumers are spending more and more on things that really make them happy, and guess what, pets are one of them!

An increasing awareness of healthy food for both humans and pets stimulates the import of safe pet food and large investments are made in the development of state-of-the-art products and accessories.

### **What to expect?**

During the GlobalPETS Forum Asia you will get the unique opportunity to connect with a group of 150 C-level professionals in the pet industry. The size of the event allows for an intimate setting with enough time to socialise and network.

The event offers a wide range of speakers from Europe, the US and Asia on the following topics:

- The do's and don'ts of introducing a brand into a new market
- Case studies of successful market launches in the Chinese pet market
- The needs and interests of European, American and Chinese investment companies in the pet industry
- Tips and tricks on regulations for import and export of pet food around the world

### **Pet Retail Tour**

Join us on Friday 22 November on the 'Pet Retail Tour' where we will visit successful retailers and learn about the specifics of the Chinese consumer market. Further details will follow soon.

### **Apply now for the CIPS Innovation Award 2019**

On the evening of Tuesday 19 November, companies in the following categories will be awarded the prestigious CIPS Innovation Awards 2019\*:

- Pet food
- Pet accessories
- Small animals
- Aquaria
- Design

### **Reserve the dates!**

19 November 2019 - **GlobalPETS Forum Asia**  
22 November 2019 - **Pet Retail Tour**  
20 to 23 November 2019 - **CIPS**

Availability is limited, so sign up now via [globalpets.community/gpfa](http://globalpets.community/gpfa)

\* An international jury panel will judge the applications, a max of 10 per category is allowed. The products must have been launched after September 2018. For other requirements and the application form go to: [globalpets.community/gpfa](http://globalpets.community/gpfa)







# Accessories

**Innovation and design are becoming increasingly important for pet accessories. How are factors like e-commerce, IoT, humanisation and sustainability impacting the industry?**

Holland Animal Care	THE NETHERLANDS	12
Human trends are pet trends		14
Trends for innovation		16
Innovation and design for pet accessories: bane or gain?		22
Jinjiang Qimei Gifts and Favourite Industry	CHINA	25





Holland Animal Care THE NETHERLANDS

## Strategic partner for the retail industry

One-stop-shop for high-quality farm animal and pet products offers unique services to dealers and veterinarians.

### Offering true value to animal health

When Dutch entrepreneur Gerbert Hofman started his business in 1987, his prime focus was on providing medicine and supplements for larger farm animals. Since then, the company has grown to become a leading producer and distributor of farm animal care, as well as pet products. What has remained unchanged over the years, is the company's mission to stand out from the rest by providing its own, high-quality products that offer true value to end users.

### Today's company

Now 32 years on, the family business has over 70 employees working within three business units:

- Hofman Animal Care: products for pet shops, agricultural dealers and equine stores in the Netherlands.
- Holland Animal Care: specialised in export to over 40 countries.
- Vet Animal Care: products exclusively for veterinarians.

The company's unique one-stop-shop formula provides the specialist trade with a wide range of innovative products. This range includes products for virtually all animal species. Importantly, many products are developed in-house.

### Historical milestones

- 1987** Founding of the company: focus is on healthcare products for farm animals
- 1987** Take-over of Lieve's
- 1993** Build of first head office
- 1998** Start of international export under the name Holland Animal Care
- 2000** Move to new head office
- 2007** Launch of products for the pet industry
- 2012** Further international expansion in the pet industry
- 2019** Move to new head office

# PET FOOD

In-depth

**expertise** delivering  
**a crucial ingredient:**  
product analysis



19/01/19/003 - Getty Images

Health and care products still play an essential role. At the company's state-of-the-art production location, Holland Animal Care produces feed supplements in line with the strictest hygiene standards.

Products are manufactured as an A-brand or as a private label. The company's specialists closely manage the complete production process: including adequate labelling and a stringent quality control. This unique concept makes the company distinctive in the market.

In addition to healthcare products, the company also manufactures its own exclusive pet toys and accessories and is distributor of leading pet toy brands from the US, such as KONG, Chuckit, JW and Pet Sport USA.

## The next step

As the world changes and consumer behaviour is impacted by the Internet and online shopping, Holland Animal Care continues to focus on strengthening partnerships with the retail industry.

Training and informing dealers is one way of doing so, both at the new head office as well as using state-of-the-art distance learning concepts. ♦

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# Human trends are pet trends



As pets are increasingly humanised, pet trends are mimicking the human ones.

## Tracking the trends

In many countries, pets are considered as being full family members. Trends affecting the family also affect our pets. What are important trends in design and innovation for both pets and their human owners?

## Tech

The tech trend is probably the most important and impacting one. There is little around us that is not affected by technological advancements.

Take the trend in smart homes: smart pet devices in such homes are a must. Already, there is a wide range of products to meet this demand, with everything from cameras to check in on our pets when we are at work, to remote controlled feeders, dog pedometers and much more.

But tech also latches on to another major trend: health. The Toletta, for instance, is a litter box that checks your cat's health by analysing its urine. And your (and your dog's) love life is also being dictated by tech. DIG is a dog dating app that matches dog lovers.

## Health

Another major trend is the health trend. It preaches total well-being as the ultimate goal. Our pets are on board this fast train to health fulfilment. From meals customised to personal pet health needs, to

alternative therapeutic hemp products, and from doga (dog yoga) to pet-icures. Organic pet food – not so long ago the pet trend – no longer suffices. Now meals need to be fresh, pure and easy to prepare. Preferably produced by a bespoke, local company that delivers at our door. And as for vet care: there is a growing demand for on-demand, at home care.

## JOMO

JOMO (the joy of missing out) is an offspring of the health movement and the counterpart of FOMO (the fear of missing out). JOMO says we should take time off and relax. In fact, looking after ourselves is no longer considered egoistic but a must. In this busy day and age, me-time is essential, as is time spent on social contacts. This trend means we want to spend as little time as possible on other things, of which shopping is one. Ordering a product should take as little time as possible and purchases must be delivered fast, to our doorstep.

## Online shopping fun?

Besides ease-of-purchase, pet owners are also looking for top-notch service, such as same-day-delivery. On the other hand, pet shops still have a trump card in hand there where pet owners are looking for know-how and social interaction. Pet shops who can offer their customers true added value through personal and personalised contact are still preferred by many pet owners.

## Accessories

A new trend is that of subscription boxes for pets. For instance, the KitNipBox is a monthly cat subscription box that brings cat owners quality toys, natural treats and other healthy fun products. And for those pet owners who need to travel with their pets, there now is the pet-friendly version of Uber: Spot On Pet.

### Traceability

Nowadays, it no longer suffices to have a good product. Consumers are increasingly keen on knowing everything about the product, and the ingredients and materials used. Transparency and traceability are key. Is the product made in a sustainable manner using sustainable materials? And what about recyclability? Is it biodegradable?

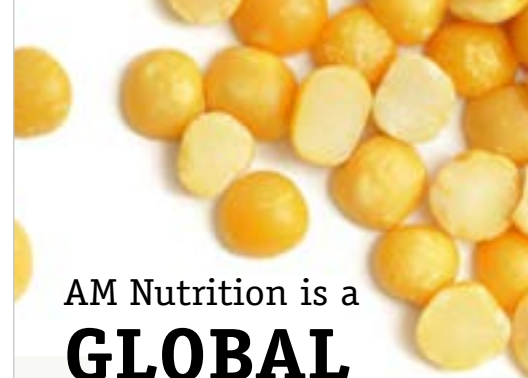
An example of a product that utilises sustainable materials is Ruffwear's Restcycle Bed. It has a sleeping surface made from recycled materials and is designed to retain its shape. It is also impervious to liquids and odours.

### Less is more

With more pet products on the market than ever before, there is a real danger of pet owners becoming lost in the jungle of product offerings. Growing awareness amongst pet owners that this manufacturing overload is seriously impacting our environment, is signalling a new trend: that of minimalisation. This trend is also driven by the smaller living spaces in crowded urban areas. Manufacturers who can provide suitable solutions for this new trend where less is more, have much to gain. ♦



**Marlous van Teunenbroek**  
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m.v.teunenbroek@gmail.com



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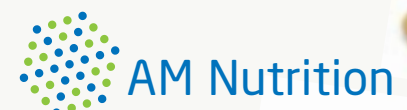
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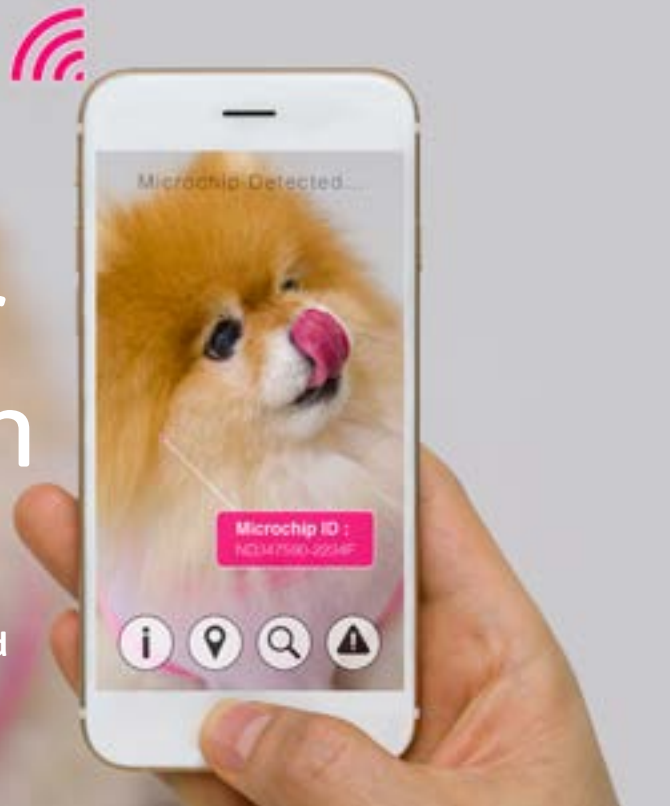
Natural, healthy and functional ingredients.





# Trends for innovation

Market researcher Mintel recently looked into some innovative products that could offer pet brands considerable leverage in years to come.



## Sustainability

Sustainability is at the forefront of retailing today but only a handful of UK and European pet food brands launched products with environment related ethical claims in 2018.

Improving food packaging recycling is perhaps the most obvious route to sustainability. In the UK, Lily's Kitchen leads the call for pet food companies to 'ditch the pouch'. All of its dry pet food packaging is compostable including the seal, while the tins are completely recyclable. The brand uses aluminium trays for wet food, which – apart from the sticker – are fully recyclable, setting it apart from much of the rest of the market, where the use of flexible stand-up plastic pouches has become widespread.

Besides packaging, our love of the planet is having an impact in a whole host of ways. Take insect protein dog food. Still relatively rare, Green Petfood Sensitive Insect Dog Alleinfuttermittel für Ausgewachsene Hunde mit Insektenprotein und Reis (Adult Dog Food with Insect Protein & Rice) is made with 100% insect protein as the only animal source of protein.

## Ingredients

Pet food would seem to be an obvious fit for insect protein, being less likely to trigger feelings of disgust than insect products made for human consumption.

However, this food attracts only a minority interest, partly due to lack of familiarity. Emphasising health benefits, environmental credentials and high-protein levels offered by insect protein-based pet food is required to boost appeal.

## Mood food

With trends in the human food market often filtering down to pet food over time, mood food concepts have further potential in pet food. Increasing interest in botanical ingredients is promising for innovation using these ingredients in pet food.

In the UK, The Farm Kitchen Laughing Dog brand places a strong emphasis on dogs' emotional wellbeing, supported by the use of such botanical ingredients. Its trio of complete wet food, for example, is said to be 'brimming with naturally wholesome ingredients to make your four-legged friend 100% dog happy'. It contains chamomile, ginger, burdock root and peppermint, which are 'known for their calming properties'.

Consumers' quest for more natural remedies and a holistic approach to their own and pets' lives opens up opportunities for pet food products based on natural remedies and ancient medicinal approaches such as Traditional Chinese Medicine, Jamu and Ayurveda.



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### Internet of Things

The rise of the Internet of Things (IoT), digitalisation and smart devices have disrupted industry after industry, with customer-facing technologies also paving way for digital transformation of the pet food industry. From the rise of online subscription services and convenient auto-replenishment programmes to pet wearables, pet owners will have innovative solutions to care for and connect with their pets like never before.

The Link AKC smart collar allows owners to track the location of their dog, create photo albums of their dog, track activity levels and see what the ambient temperature is. It comes in a leather collar, charging stand and app download.

### Humanisation

Finally, the trend toward humanisation in the pet market has seen IKEA launch a line of furniture for pets which is dubbed LURVIG – Swedish for 'hairy'. The range features pet beds, cushions, scratching posts and other items designed to fit around pre-existing furniture.

In the UK, 17% of pet owners bought pet furniture for their pet, so there is clearly potential for these kinds of products. The fact that the furniture range comes in the classic IKEA look, will help pet owners bring pets into their family lives even more. ♦



**Emma Clifford**  
Associate Director Food & Drink  
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- Moser Sheddy: The allround rubber brush for short-haired breeds and cats. Removes loose hair, cleans the fur, stimulates the metabolism and removes hair from textile.

ZOOMARK – HALL 26, BOOTH C87

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MINIREEF 150 MARINE SET (BLACK OR WHITE)	55 X 55 X 55/80 CM CABINET HEIGHT	150L
MINIREEF 160 MARINE SET (BLACK OR WHITE)	90 X 45 X 45/80 CM CABINET HEIGHT	160L

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# Innovation and design for pet accessories: bane or gain?

**New materials and new legislation are increasingly driving the accessories market. Developing new products requires investments, but can also bring considerable benefits: to both pet owners and accessory manufacturers.**

## **When innovation and design team up**

When speaking of product innovation, we often think of products that have been developed from scratch to support us in driving change and progress. For a long time, design was considered as being subservient to innovation: a mere matter of aesthetics. However, increasingly, the awareness is growing that innovation and design are closely linked. When both are given sufficient attention, they become invaluable in helping solve complex problems. Together they help create new products that re-define the world around us.

## **Smart, high-tech, efficient, ethical, sustainable and optimised...**

Innovation and design in the pet accessories market is comparatively new. The demand for specific, value-adding products for pets' cohabitation with their human owners has, in fact, emerged only recently. But, demand is growing fast and constantly evolving. Not only are pets acquiring more relevance in our lives, there are many locations – where pets hang out with their owners – that do not cater to the needs and requirements of pet visitors. It is here where there are many opportunities for the accessories industry.

Take travelling and associated locations and transportation methods – both public and private – frequented and used by pet owners and their pets: cars, trains, planes and hotels and restaurants. Such locations were previously 'no go' areas for pets. In the meantime, though, they have been declared pet friendly and are much-loved research topics for designers the world over. Already, in the US, airport toilets for dogs are mandatory by law! So, developing new, innovative products is not only a must, but also an opportunity to step into new, evolving markets.



## Accessories



### New legislation as trigger

New legislation is not only limited to airport dog loos. It has, in fact, triggered the production of products such as the first poo bag holder: United Pets' Bon Ton. This innovative, design product was created at the end of the nineties and became an instant hit. Well before the law which came into effect in March 2009 regarding the removal of dog poo!

The more recent law of February 2015 establishes a guideline for dog owners when walking their four-footer: as one cannot forbid the dog to pee, the guideline suggests owners carry a small bottle of water to rinse away the pee. The Bon Ton Pi, a small bottle designed by Jannu Carrillo for United Pets, fits the bill to perfection.



### Knowing what pets need

The growing awareness of pet needs has also resulted in new products that are focused on offering best solutions to problems possibly faced by our pets. Take for instance, the innovative design of the Green by Northmate feeding bowl. This slow-food bowl inhibits the dog from eating too fast thanks to the bowl's characteristic, charming and functional fake straws of grass.



### Innovative aid accessories

A recently launched, innovative, adjustable dog support harness helps owners to provide physically impaired dogs with the necessary support to go out for a walk. Impairments can include: poor stability, painful or broken joints or another mobility impairment.



In fact, we can say that design is no longer about creating an attractive and unique shape. It is also about creating the best solutions to help solve everyday challenges. It involves extensive research into product requirements and optimisation, sustainability and cost-effectiveness. In fact, manufacturers who fail to invest in product design are likely to fall off the present-day pet accessories bandwagon where compliancy and lean production methods are key.

Going one step further: manufacturers who are successful in streamlining product design to also reflect their brand strategy are bound to come out as winners in a highly competitive market. Pet owners are willing to spend more on products that fulfill their expectations and are bound to return for repeat purchases. So investing in product design might cost you now, but will sooner than later result in increased brand loyalty and increased sales. ♦



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### Background

Founded by Malaysian KW zone group in 1993 the Jinjiang Qimei is a one-stop shop for aquarium products and home to some other pet product classics. However, their main specialisation is producing tanks, fish food, filters, and accessories.

### Home to groundbreaking technology

With a facility that is more than 100,000 square meters, and 600 employees, it is able to offer one of the largest ranges of self developed and produced aquarium and other pet products in the world. All products are manufactured under strict ISO9001:2008 GB/T19001-2008 and HACCP Quality Management rules

and regulations, so pet owners can be assured that their pets are surrounded by top quality products.

The company is exporting its products to over 65 countries. Beside their own products they are also delivering OEM possibilities, based on fast delivery and attractive prizes.

### Latest innovation

The company is innovative and creative, developing and investing in new and highly technical products year after year. The plan for 2019 is to launch at least 20 types of pet products.

The latest new product to reach the market is the Dolphin Super Thin

LED light. It is designed with energy saving heat dispersion, offers three types of light control, and not only enhances aquarium plant growth but the fish colours as well.

Another exciting product is the ECO DC Variable water pump which is compact, quiet, easy to handle, has four working modes, a water shortage alarm, and is suitable for all fish environments. ♦

♦ **Jinjiang Qimei Gifts and Favourite Industry Co., Ltd**  
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## Pet food

It is the International Year of the Salmon. Twelve months (and more) of awareness-raising events and projects supported by fourteen countries. Healthy wild salmon stocks indicate healthy rivers and oceans. And fish both caught and farmed provides perfect proteins for pets.

Salmon in a changing world	28
Concerns about grain-free food	30
Marine proteins: the blue revolution	32
Avantis <small>SPAIN</small>	35
Salmon meal and oil in pet food	
Healthy and sustainable	38



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# Salmon in a changing world

Salmon, the common name for several fish species in the Salmonidae family, is a key ingredient in many dog and cat food ranges.

### At risk

Despite the fact that salmon are increasingly farmed, wild salmon are at risk from environmental change and human interference. Their extensive migratory patterns, with them hatching in fresh water, migrating to the ocean, then returning to fresh water to reproduce, means that they are more vulnerable to environmental quality than non-migratory fish. Alarm about the impact of humans and the environment on wild salmon populations, with specific reference to the pet industry, was raised more than a decade ago.<sup>1</sup> Salmon are good indicators of ecological health: healthy salmon stocks = healthy rivers and oceans.

### International Year of the Salmon (IYS)

IYS is an initiative that was developed and launched by the North Pacific Anadromous Fish Commission (NPAFC) and the North Atlantic Salmon Conservation Organization (NASCO). Although it has relevance over several years, 2019 is the focal year of the campaign. Celebrated by fourteen countries in the northern hemisphere, IYS is being marked by a diverse range of awareness-raising events and projects focused on the need for continued attention towards conserving and improving salmon stocks.

#### International Year of the Salmon

IYS is an international framework for collaborative outreach and research. Countries participating in IYS:

Canada	Germany	Scotland
Denmark	Ireland	Sweden
England	Japan	United States
Finland	Norway	Wales
France	Portugal	



Events and projects include art festivals; conferences on scientific, ecological and cultural aspects of salmon; dinners and social occasions; the World Salmon Forum; a photographic challenge; salmon-tracking workshops; and school projects for children.

There are also conservation projects, such as water-course improvements of rivers, catchments and riverbanks to allow fish passage; habitat restoration and enhancement; reintroduction of salmon in certain areas; an urban salmon project; and contributions to scientific journals.

### Sustainable ingredient in pet food

The use of salmon is widespread in all kinds of dog and cat food. This involves a variety of salmon products, including oil, broth, meat and meal. But how can pet food manufacturers improve sustainability in their use of salmon products?

### Extended shelf life

Salmon is an oily fish – one of the best dietary sources of omega-3 fatty acids. However, many fatty acids oxidise and go rancid quickly. This is a specific challenge in the use of salmon oil. There are products available such as Frutarom's SubStar™ formulations that prevent or minimise oxidation of the fatty acids in salmon oil, extend shelf life and improve product quality. These can help enhance the sustainability of pet food products containing salmon oil.

### Use sustainably bred, farmed salmon

Salmon farming now utilises cutting-edge technologies in genetics and fish farming. Through genetic advances, salmon breeders focus on improving survivability, growth and health. The latest fish farming innovations include automatic feeders, water reuse and treatment systems, thermal control of water and photoperiodic control. Therefore salmon breeders can offer eggs to salmon growers that enable them to continue sustainably, all year round.

### Support sustainable initiatives

What else can you do to enhance sustainability?

- Support IYS. For more information, visit: [yearofthesalmon.org](http://yearofthesalmon.org).
- Contribute to national and international discussion and forums on sustainability in salmon products.
- Increase consumer awareness of sustainable salmon options in pet food.
- Consider using alternatives to salmon, for example other oily fish.
- Consider using other fish products, for example bycatch.

There are many ways to enhance sustainability in the use of salmon in pet food. With IYS now here, what better time to integrate this into your business objectives. ♦

Reference:

1. 'Towards understanding the impacts of the pet food industry on world fish and seafood supplies'. *Journal of Agriculture & Environmental Ethics* 21 (5): 459-467. October 2008.



**Sara Sharpe**

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[sara@thecreativepractice.com](mailto:sara@thecreativepractice.com)  
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# Concerns about grain-free food

A recent FDA announcement alerted consumers and industry to dilated cardiomyopathy (DCM) in dogs eating grain-free foods. Surely it was too early for this warning.

[www.isegrim-petfood.com](http://www.isegrim-petfood.com)



*One negative comment online soon multiplies into 'facts' and 'truth'.*

### Caution required

The report of an ongoing investigation in the US received global media attention. Self-proclaimed 'experts' passed it on to millions of concerned consumers. Not wanting to add to the growing number of articles on the subject, I do want to suggest caution. There are great differences in the hundreds of grain-free foods produced: ingredients, processes and nutrient balances. To say they could all suddenly cause a nutritional health issue seems premature.

Grain-free foods have been on the market since the early 2000s (some 'non-grain' pet food even before that) and no such trend has been reported before now. Consumers like to buy pet food with similar ingredients to their own diet. If they avoid wheat because of coeliac disease, or gluten for other reasons, their pets should too. Is humanisation leading to nutritional issues?

### Good science takes time

Higher incidence of DCM in some breeds is a known fact. Using pharmacological taurine levels has been helpful for treatment of DCM. But do nutritional taurine levels similar to those in cat food prevent or delay the treatment of DCM? And do certain ingredients, nutrient balances and processes increase the number of breeds affected or the speed of the onset of DCM?

### No real answers exist

The basis of good science is to propose a theory based on observation and review. Good scientists test and retest hypotheses for years until careful interpretations can be made. Whatever work we do, having strong opinions and overstating what the facts show can stimulate healthy debate, but the facts must be there. The FDA warning about grain-free foods is concerning as data is limited.

Announcing an investigation into DCM-related issues would have been enough, but the connection between DCM and grain-free foods is now becoming fact.

### Consumers need facts

A year ago, I was approached by a consumer group convinced that all dog food is taurine-deficient. I pointed out that food I had created has taurine fortified – not to prevent DCM, but to be nutritionally prudent. The group was adamant that all dogs must receive mega doses of taurine. I suggested that a taurine supplement might be a precaution in breeds with genetic implications, but pharmacological doses of taurine in all dog food was costly and unproven science. The group intended to recruit more members and present their case to regulators. Perhaps they later approached the FDA. Did they stir things up on the internet before there were facts? It remains unclear.

We live in a world where guesses and assumptions can be presented as facts on the internet. One negative comment online soon multiplies into 'facts' and 'truth'. We need to be careful about drawing conclusions with a snapshot of data. We should not discard any food products based on theory. We must use precaution in the communication of scientific facts, because assumptions will be made and facts can be twisted. ♦



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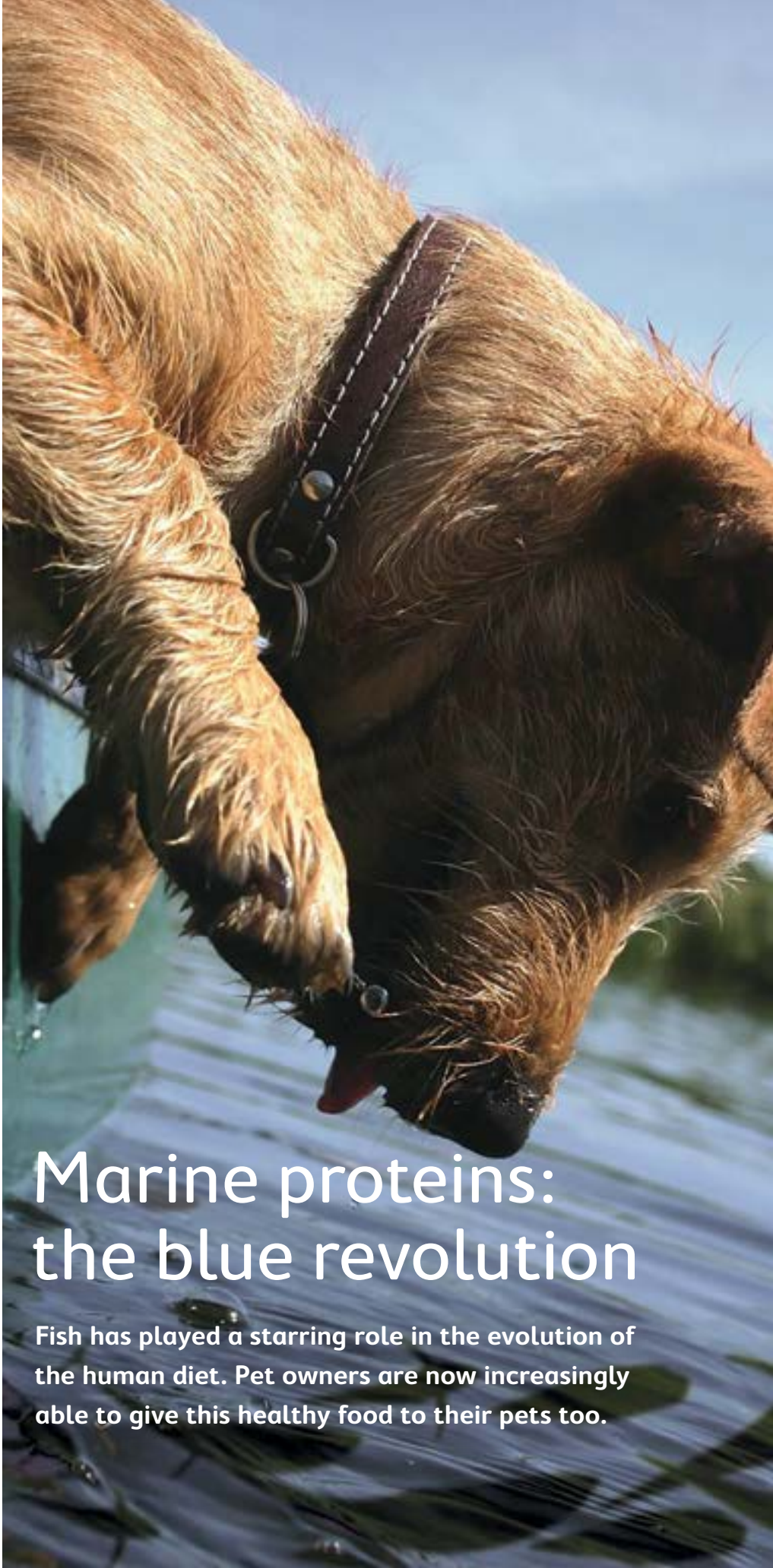
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## Marine proteins: the blue revolution

Fish has played a starring role in the evolution of the human diet. Pet owners are now increasingly able to give this healthy food to their pets too.



*From a sustainable perspective, farmed salmon is an efficient converter of feed that leaves a relatively low carbon footprint.*

### Farming for the future

According to the UN's Food and Agriculture Organization (FAO), the world's population will grow to nine billion by 2050. At the same time, there will be increased demand for marine proteins and oils. In that scenario, sustainable salmon farming will play a key role in feeding the world while preventing overfishing. This will be the base for significant growth in aquaculture expected in the coming years.

In times of humanisation, it is not surprising that pet owners prefer quality sustainable ingredients for their pets, making fish and other marine ingredients perfectly suited to this role.

Salmon is a great source of high quality protein, omega-3 fatty acids, essential minerals and vitamins. It is also highly digestible and palatable. Unsurprisingly, it is an ingredient in many premium and super-premium pet food formulations. From a sustainable perspective, farmed salmon is an efficient converter of feed that leaves a relatively low carbon footprint.

### Versatile use

Until recently, only a few brands were based on marine raw materials. Currently, there is an increasing interest in marine ingredients for pet food and this trend is expected to continue, given the wider availability on the global market. Fish and marine rest raw material (MRRM) are very versatile for use in pet food: from complete dry and wet recipes to functional supplements and treats.

Fish protein is included in diets as fishmeal concentrates, hydrolysed protein or simply fresh fish. Fish protein hydrolysate results from the breakdown of fish proteins into smaller peptides after enzymatic treatment or under acidic medium conditions. The output is a range of novel protein

sources which are highly digestible, have low allergenic effect and give excellent palatability.

Fish, krill and algae are also valuable ingredients in formulations for dogs and cats, as a source of high quality oils and as nutraceuticals. Marine oils supply high levels of the essential omega-3 fatty acids EPA and DHA, with well documented effects on pet health and well-being. Fish is also a rich source of essential nutrients such as vitamins A, D, E, and B complex, plus iron, phosphorus, selenium and iodine.

### Value creation

Besides the sustainable aspect, the use of rest raw materials from fisheries and fish farming is a great opportunity for value creation and improving raw material flow. With different processing techniques and a focus on food safety, MRRMs such as fish skin, carcasses, liver and roe can be turned into high quality pet food ingredients.

Dogs and cats love fish. It is a highly palatable ingredient with nutritional value and health benefits. Fish is good for pets and good for the environment. ♦



**Dr. Laura Gil Martens**  
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# Young and ambitious

**Cecoagro saw great potential in the global dynamism of the pet food sector.**

## International diversification

Avantis is a relatively new addition to the Spanish industrial group Cecoagro. The pet food subsidiary was set up as part of an international diversification strategy. It is active in various market segments, offering a wide range of dry pet food from medium-priced to super premium.

## Variety of brands

PetCool is a high turnover brand with fun design, competitive prices and excellent quality. A selection of real bestsellers.

Avantis is the company's main brand and stays true to its primary aim: providing 'intelligent nutrition'. Reaping the benefits of age-old secrets, it incorporates an exclusive selection of the finest botanical ingredients into its products. The best of nature helps to care for pets and prevent illnesses.

A recently launched product line is Pure. Natural ingredients, holistic care, fresh meat, grain free – this super premium pet

food has the product features that appeal to today's consumers.

## Exclusive, ethical... and certified

All Avantis formulae have been carefully designed by experts. Each product has an exclusive formula and each kibble is the result of many hours of hard work, extensive experience and in-depth knowledge.

Avantis is committed to protecting the environment with sustainable, cruelty-free pet food. The ingredients are free of genetically modified organisms, and product development and manufacturing methods comply with ISO 9001 and ISO 22000 quality and safety standards.

## Technology made in Europe

Avantis has selected production partners with the best technology in Europe. Using fresh meat, for example, entails only one heat treatment prior to becoming kibble. This gives substantial nutritional benefits when compared to products containing

meat meal. All fresh fish and meat come from suppliers of food for human consumption. Another benefit is the 100% natural appetite enhancers that give unique flavours and characteristics that make pets want to eat.

## Thinking globally...

...and working globally: a growing number of countries are supplied from production plants and warehouses in Iberia (Spain and Portugal). The export team provides customers with all possible support to make market entry as easy as possible. This includes assistance with product registration. The company is currently seeking experienced partners as exclusive distributors to complete its international expansion. ♦

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# Salmon meal and oil in pet food

## Healthy and sustainable

**The salmon aquaculture industry is benefitting from fishmeal and fish oil production. Why is that?**

**Growing sector**

Salmon farming has grown continually over the years. With substantial production in Norway and Chile, as well as Scotland, Canada and the Faroe Islands, the industry is now producing some 2.5 million tonnes per annum.

There is a natural synergy between this aquaculture and the production of fishmeal and fish oil, with these products providing valuable nutrients for salmon growth and physiology. They are rich in 'essential' amino and fatty acids (including omega-3 fatty acids); substances animals cannot synthesise themselves, so must be supplied by their diet. Together with a range of micronutrients, such as vitamins (A, D, B12) and minerals (Fe, Zn, P), fishmeal and fish oil are a foundation for salmon nutrition, as well as for other farmed aquatic species.

**From fish to cat and dog**

The nutritional advantages of a salmon product for farmed fish are also carried over to the consumer. They too reap the benefits of high concentrations of omega-3 fatty acid, highly digestible protein and other nutrients.





Unsurprisingly, what is good for humans is also good for animals, and with a continually growing salmon sector, the pet food industry has access to salmon meal and salmon oil stocks in formulations for, in particular, cats and dogs.

### High quality, appetite and palatability

The trimmings that result from farmed salmon processing are of food grade, and consequently high quality. This, in turn, makes for very high quality meal and oil products that carry forward nutritional excellence into pet food.

In addition to important nutritional factors and their advantages, fishmeal in general (including salmon meal) possesses several important compounds known to influence appetite in farmed fish species. This is currently being investigated in some IFFO technical projects. It is highly likely that these factors also contribute to appetite and palatability in cat and dog foods.

### Sustainable growth potential

Production of fishmeal and fish oil from farmed fish by-products represents commercial growth potential for the fishmeal industry. Inclusion rates for meal and oil in salmon feeds have been dropping over the last 20-30 years, largely due to supply and availability. But as aquaculture continues to grow, there will also be increased availability of trimmings

from processing farmed fish that can be utilised as a valuable resource for the supply of protein. An additional benefit of farmed fish processing is its centralised trimming collection and handling.

The development and uptake of certification schemes and codes of practice in the aquaculture sector are testament to continual improvements in the industry's sustainability. A successful salmon farming industry and technology transfer from that sector are key factors in global aquaculture development, ensuring that there will continue to be a plentiful supply of high quality salmon meal and oil for pet food in the future. ♦



**Neil Auchterlonie**  
Technical Director  
IFFO. The Marine Ingredients Organisation  
nauchterlonie@iffo.net  
iffo.net









# Pet food and ingredients

Functional, sustainable, natural, human-grade... today's pet owners are demanding more than 'just' pet food for their pets. We look at how pet food manufacturers are upping their game. But are recent trends sustainable?

Finding the do-it-all functional food ingredient	42
Raising your antioxidants game	44
Sustainability through design – the big picture	46
Fish or flax?	49
Ready meals for pet and owner?	51
Plant-based ingredients with exceptional value	54
M-PETS BELGIUM	57
It's all about texture	59





# Finding the do-it-all functional food ingredient

**Today's pet owners demand functional ingredients with genuine value, backed-up by scientific fact, not speculative marketing jargon. But finding the right ingredients is no easy feat.**

## **New owners, fresh attitudes**

The current generation of pet owners is completely changing what is demanded of the pet food industry, demanding more of pet food than just nutrition.

This is of course all good news: our cats and dogs are healthier, whether they are in Kyoto or Kansas, receive a better standard of care and live longer than even before. At the same time, functional, or proactive pet food ingredients that offer proven health benefits or can help address such age-related health issues are rapidly becoming an absolute necessity for pet food manufacturers wanting to succeed in a congested, competitive market.

## **Super functional**

Outside of traditional vitamins, minerals and fibres, functional probiotics, polyphenols and omega-3 fatty acids are becoming increasingly popular with manufacturers, as are enriched selenium yeast, flaxseed, coconut oil and blueberries to list just a handful.

However, when it comes to functional ingredients that can keep our pets in the best possible shape year-in, year-out, one stands alone: omega-3. It is no big secret that omega-3s play a vital role in pet food, as dogs and cats are unable to produce them naturally and rely on their diet to maintain healthy levels in the body.



## Pet food and ingredients

*By adding the right amount of omega-3s to a pet's diet, inflammation levels can be better regulated.*

Just like us humans. As close as a do-it-all functional ingredient as it gets, omega-3s help maintain the health of numerous vital organs, including the heart, kidneys, liver, joints, brain, eyes, skin and coat.

For example, studies have shown that regular and sufficient consumption of omega-3 fatty acids EPA (Eicosapentaenoic acid) and DHA (Docosahexaenoic acid) are absolutely essential for pets to maintain a healthy and well-functioning heart, therefore reducing the risk of cardiovascular disease.

Omega-3s also act as anti-inflammatory nutrients that can help balance the body's level of inflammation. Dogs, in particular, suffer from chronic inflammation, which may lead to several secondary health problems. By adding the right amount of omega-3s to a pet's diet, inflammation levels can be better regulated. When the body's inflammation level is balanced, distress and disease risk is reduced.

### Right ingredient, wrong variant

But not all omega-3s are equal. Omega-3 fatty acids EPA and DHA can be consumed in either the triglyceride form, typically found in traditional omega-3 sources such as fish, or in the phospholipid form prevalent in Antarctic krill. This is key, as phospholipid-bound omega-3s are more efficiently incorporated into the body's cells, tissues, and organs. Another distinguishing benefit is that omega-3 phospholipids are water soluble, making them gentle on pets' stomachs and readily absorbed by the body.

### Krill-iant omega-3

It is why one of the most efficient omega-3 sources for pets in the market is krill meal, available under the brand name QRILL Pet from Aker BioMarine. A 100% natural product, certified by the Marine Stewardship Council, it is made only from whole dried

Euphausia Superba, an Antarctic krill species, rich in the long chain omega-3s EPA and DHA, the powerful antioxidant, astaxanthin, and high-quality proteins.

Recognised for its health-promoting suppression of free radicals, astaxanthin counteracts oxidative stress and damage to proteins, lipids and DNA. It also keeps the krill meal fresh, protecting the omega-3 fatty acids from oxidation, so no other preservatives need to be added. Rich in marine fats and proteins, importantly QRILL Pet is highly palatable for pets and will not leave them with fishy breath.

### The right ratio

Lastly, however, as good as omega-3s are, if you do not get the ratio to omega-6s right, you will not see the benefits. Failing to do so can lead to low omega-3 levels among pets, which can influence bone and joint functions, as well as brain development, and can cause allergies and cardiovascular problems, dry and itchy fur and skin. The recommended ratio in pet food of omega-6s and omega-3s is 5:1.

A single ingredient, with numerous benefits for pet health, omega-3 derived from Antarctic krill, in QRILL Pet, is a tailor-made, natural performance ingredient, ideal for quality, functional pet food formulations. ♦



**Knut Heggen**  
Vice President QRILL Pet  
Knut.Heggen@akerbiomarine.com  
akerbiomarine.com



# Raising your antioxidants game

## Why protecting pet food against oxidation is more critical than ever, and how to go about it.

### A rising risk

The development of better pet food diets with an optimum balance of omega-3 and omega-6 fatty acids and content of long chain polyunsaturated fatty acids (such as EPA and DHA from algae or marine origin) has been a significant nutritional improvement for our pets. Being high margin products, these formulations are a major opportunity for pet food manufacturers and brand owners, but one that comes with increased risk: that of maintaining stability.

The risks associated with the formation of free radicals include rancidity development and the subsequent deterioration of product quality, pets' refusals to eat products, and consumer complaints and exposure on social media platforms.

Understanding of the high susceptibility towards oxidation and how to minimise it therefore remains a top priority for manufacturers and brands.

### Antioxidant types today

Historically, antioxidants have been used in pet food systems to protect against lipid oxidation, maintain palatability and protect essential fatty acids and nutrients throughout the shelf life. The design of efficient synthetic antioxidants goes back to the 1940s.

Today, antioxidants are used at many steps in the supply chain to protect quality of materials for animal nutrition: raw materials during rendering processes, bulk oils and fats, pre-mixtures, protein meals, palatants, extruded and oil-coated feed and pet food systems. This also applies to raw pet food stored in frozen form, freeze-dried pet food, dehydrated pet food as well as pet treats, which can oxidise too.

As fats remain an essential part of the diet, antioxidants will continue to play an important role in protecting these lipids against oxidation and rancidity. However, the type of antioxidants used in pet food diets has changed over the years.

# NOT JUST PALATANTS.

Recently, we have seen the suspension and likely banning of ethoxyquin in the EU. Ethoxyquin is now being replaced by safer synthetic antioxidants and even combinatory solutions of natural and synthetic antioxidants to achieve an equivalent shelf life extension to ethoxyquin.

## Natural, clean and safe

Looking ahead, rising demand among millennials for healthy, nutritious and natural products will greatly impact the pet food market and the antioxidants that manufacturers are likely to prefer. So, which antioxidants have a natural, clean or safe profile?

Natural mixed tocopherols (Vitamin E) have a good image and are obviously very important, because animal fats and oils contain only a trace amount of tocopherols, if any. A certain shelf-life extension can be achieved with natural mixed tocopherols; however, there is a limit.

Rosemary extract (carnosic acid) will have an increasing importance and will further add to shelf-life beyond what natural mixed tocopherols can provide. A certain degree of purification is needed including selecting material, which will not impact the palatability.

Ascorbyl palmitate, now widely used in infant formula, has a very safe profile. It is physiologically acceptable. It breaks down in the digestive tract and releases vitamin C and palmitic acid. It has been overlooked for pet food applications, but is now gaining more interest. Ascorbyl palmitate is an excellent antioxidant for rendered fats and oils and for dry pet food products. ♦



**Neeti Chavan**

Head Technical, Camlin Fine Sciences Ltd., India  
neeti.chavan@camlinfs.com  
camlinfs.com







# Sustainability through design – the big picture

**Squaring the circle of pets in society will require widespread cooperation to ensure a sustainable future. Is the industry up to the challenge?**

## The paradox of pets in society

The beneficial role of pet ownership in society is well-established, with physical and mental health benefits observed that include reduced blood pressure and reduced stress. However, in fulfilling this special role, pets are often treated as family members, and the ensuing humanisation, including the humanisation of pet food, in some minds, comes at a cost.

Not only is there an ethical question about the humanisation of pet food, but no agreed definition of human-grade pet food ingredients exists. Besides, genuine human-grade pet food requires 100% compliance with human food safety regulations, making it very expensive and not accessible to all.

Further adding to the paradox is the question of pet food sustainability and the environmental impact of dog faeces (estimated to amount to 10 million tonnes in the US in 2014), exacerbated by growing urbanisation, with 68% of the global population predicted to be living in cities by 2050.

## Pressure is rising

Experts believe that most countries suffer from human malnutrition like undernourishment and obesity. Although obesity and undernourishment in pets is also evident, industry compliance with nutritional guidelines, such as AAFCO and FEDIAF, generally ensures a well-nourished pet population.

However, further pressure on pet food sustainability can be expected, since the UN has set the goal of ending human malnutrition by 2030, while at the same time the global population is predicted to reach 9.8 billion by 2050.

## Towards pet food nutritional sustainability

The UN believes its goal is achievable through developing sustainable food systems, where a food system is defined as ‘a set of things working together as part of an interconnected whole’, and by changing the mindset of all actors to thinking from field-to-table.

## Pet food and ingredients

In such an interconnected system, values must be shared across the food system to ensure overall mutual benefit and avoid negatively affecting parts of the system inadvertently.

What might pet food sustainability look like under such a system? Based on the UN FAO definition, pet food nutritional sustainability might:

- have a low environmental impact
- have a positive impact on health for current and future pet populations
- protect biodiversity and ecosystems
- be accessible, economically fair and affordable
- be nutritionally adequate, safe and healthy
- optimise natural and human resources.

A 2013 review by Swanson et al outlined the concept of pet food 'nutritional sustainability' highlighting that:

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

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

The challenge is: how can we achieve this to ensure that all pet food producers benefit and not only some?

### The Danish model?

For the answer, it is worth looking to the model developed by the Danish Food Cluster in 2017, in recognition of the need for global food sustainability and the importance of the food sector to the Danish economy.

The model, 'World-class Food Innovation Towards 2030', is based on a strategy where food industry and suppliers cooperate to create a mutual food research and innovation agenda that ensures both food sustainability and the role of the Danish food industry as a global player.

The model has seven key enablers:

1. sustainable production through a circular economy
2. food design – from molecular interaction to excellent eating
3. food analytics – documenting safe foods
4. omics technologies – from molecules to understanding
5. foods contributing to health and well-being
6. agile and intelligent automation
7. connected and competitive through smart use of big data.

(Reference: *World-class Food Innovation Towards 2030; Danish Food Cluster, 2017*)

### Need for cooperation

As the pet food industry faces increasing scrutiny, the Danish model could provide a mechanism that facilitates industry-wide pet food sustainability. The process has already started and a recent example of change is the announcement of the UK scheme where pet owners can recycle pet food packaging.

The question is: Is the industry willing to cooperate on a wide enough scale to implement the other enablers and ensure pet food sustainability for all? ♦



**David Primrose**  
david@sfi-ltd.com  
sfi-ltd.com



litule  
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# Fish or flax?

**Is it fair to claim omega-3 on your label when ALA-rich flaxseed oil is the real ingredient? Or is fish oil, rich in EPA and DHA the only way to go?**

## Not all omega-3s are alike

Omega-3 fatty acids contribute to the health and wellbeing of both humans and their pets, indeed most mammals. However, not all fatty acids are alike. Alpha-linolenic acid (ALA) is an essential fatty acid which the body converts to the longer-chain omega-3s, EPA and DHA. Most pets have a hard time producing EPA (10% conversion ratio), let alone DHA (0-1%).

## The benefits of fish oils

Fish oils are rich in EPA and DHA. EPA can be converted in vivo into anti-inflammatory components, thereby managing inflammation-based problems, such as joint, coat and bladder diseases.

Adding just 2.5% to 3.5% of premium fish oil to the diet yields substantial health

benefits for both dogs and cats. DHA has a more structural role and is found in high concentrations in nerve tissue such as the brain and eyes. Puppies and kittens need EPA to feed their growing brains, while older pets benefit from DHA to support their aging brains.

## Do the maths

Now back to our question – fish or flax? Let's do the maths. Omega-3s work mainly because of EPA and DHA. With ALA as the main source of omega-3, pets have to convert ALA into EPA themselves, whilst DHA cannot be synthesised at all.

Adding just 2.5% of premium fish oil yields around 4,000 mg EPA in every kilo of pet food. To match it, with ALA you will need ten times that, or around 40,000 mg per kilo. As flaxseed oil is

50% ALA, that means you will require 80,000 mg of flaxseed oil per kilo of pet food, or roughly 8%. And what you will end up with is just EPA, as DHA cannot be synthesised. From a cost perspective, this makes little sense.

## Reliable sourcing

As high omega-3 fish oils are becoming increasingly popular in pet food, the challenge is to secure sufficient raw materials to cater to the growing demand. Reliable sourcing is crucial. That is why IQI has recently joined forces with OLVEA, a world-renowned expert in sourcing, standardising and refining fish oils. ♦



**Geert van der Velden**  
Innovation Manager  
geert@iqi-petfood.com  
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A white geometric line art graphic in the bottom right corner, consisting of several interconnected triangles of varying sizes, creating a complex, abstract shape.





# Ready meals for pet and owner?

**Where will the trend for human food ingredients in pet food lead?**

**The time for a rethink is now.**

## **Whither the humanisation of pets?**

In the 22<sup>nd</sup> Century, how will we view our pets and what will we be feeding them? With today's market trends, you could be forgiven for thinking that the future for pet and human food could be the same. Picture this: food manufacturers turning out dual human/pet dinners for you and your furry friend to share.

So what challenges does the pet food industry face, in light of continuing pet humanisation and rising demand for human food ingredients?

## **Truly human grade?**

Currently much of the pet food industry uses sustainable human food by-products passed 'fit for human consumption'.

Usually these ingredients are less popular or not quite perfect for the human food market. However, after being further processed, or relocated to a pet food facility, they are no longer classed as suitable for human consumption.

True 'human food ingredients' are those that have been processed and treated in accordance with human food regulations, for human consumption. Today one of the biggest trends in pet food is inclusion of human food ingredients.

From a regulatory perspective, AAFCO (the Association of American Feed Control Officials) states that: 'There have been "human-grade" claims on some pet foods for a few years. This term has no definition in any animal feed regulations. [▶ SEE NEXT PAGE](#)

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## Pet food and ingredients

Extremely few pet food products could be considered officially human edible or human-grade.'

Ultimately, to produce a 'human grade' pet food, all ingredients need to be edible for humans and should be manufactured according to human food regulations.

### An unsustainable trend

Is this sustainable? Can this humanisation trend continue? With a world population of over 7 billion humans and rising, demand for food is increasing at the same time as pet ownership is going up. According to Statista, in the US alone, 68% of households owned pets in 2017, up 56% from 1988.

It is self-evident that the humanisation trend and demand for human food ingredients in pet food can only exacerbate ingredient scarcity.

### Unhealthy too

Contrary to popular belief, few pets, in particular dogs, require human grade, grain free, high protein, limited ingredient diets, which can have a high environmental impact.

The current humanisation of pets has influenced the pet-owner relationship, leading to issues with obesity, sedentary lifestyles and reduced opportunity for pets to express natural behaviours. According to Vet Innovations, in 2018, 'nearly 100 million pets in the U.S. are overweight or obese, making weight the leading health threat to our nation's companion animals today.'

### Pressure on production

Meanwhile, as product formats that mimic human food increase in popularity, traditional extrusion and tinned wet pet foods now require more innovation to maintain market share.

Consequently some pet food manufacturers have invested in human food technologies such as baking and freeze drying.

### Prepare for a sustainable future

So what will the 22<sup>nd</sup> Century bring? The dystopian Soylent Green's depiction of environmental disaster may be more relevant than ever. Future pets may have limited food choice and 'convenience meals' could be off the menu. Today both the pet industry and pet owners need to work together.

For industry, this means:

- providing balanced nutrition using traditional pet food ingredients and formats
- education on the benefits of offal, carcass and meals for pets
- research into new eco-friendly ingredients
- further collaboration with the human food industry on recycling opportunities.

For pet owners, understanding nutritional and lifestyle requirements is key: pets are not humans. Acceptance of them as family is fine, as long as species differences are recognised. Feeding pets a balanced diet of cereals and moderate levels of protein can have positive implications for both pet health and the environment.

Will this be enough? It remains to be seen – only the future will tell. ♦



**Emma Passman**  
Pet Nutritionist and Technical Consultant  
EJP Quality Solutions  
emmajp7@sky.com



# Plant-based ingredients with exceptional value

**Sustainable, nutritionally rich and excellent value – what’s not to like about plant-based co-products?**

## **Circular use raw materials**

With the world population continuing to grow and our planet increasingly under stress from climate change, the circular use of raw materials is of crucial importance. This means maximum use of raw materials and preventing waste. Collecting co-products and processing them into sustainable high-quality ingredients for the pet food industry does exactly that.

## **Sustainable sourcing and production**

Plant-based co-products released during the production of food for human consumption are particularly interesting from both a sustainability and nutritional point of view. Collecting and using co-products from the processing of potatoes, sugar beet, chicory roots, vegetables and

fruit means the crops are optimally used and nothing is wasted.

Furthermore, if – as is preferable – residual heat and green electricity are used, the processing of the wet incoming materials can be climate-neutral.

The end product is a variety of sustainable plant-based ingredients and blends for the pet food industry ideal for use in dog and cat food, small animal food and horse feed.

## **Nutritional value**

Nutritionally, plant-based ingredients add value to pet food in various ways. Potato ingredients are gluten-free and very suitable for use in grain-free pet food. Beet pulp contains soluble and insoluble fibres which have a positive

effect on bowel function. Beet pulp is unique due to the very low molasses content and chicory products contain inulin, a nutrient with positive effects on intestinal health. Inulin is a soluble fibre and has a prebiotic effect in the colon.

Fruit and vegetables have many nutritional benefits in pet food. They are a good source of vitamins, minerals trace elements and fibres. Carrots, broccoli, parsnips and green beans contain plenty of vitamin A, B, C and E. Just as humans, pets need vitamins in their food to grow, develop healthily and to boost their immune system. Vitamin E and C are also powerful antioxidants.

Minerals and trace elements are essential in pet food because they are vital for, among other things, good bone growth



and strength, good skin and nice fur and to help provide oxygen to organs and muscles. Fibre is a necessary part of pet food to promote general digestive health.

### Vegetable blends

Duynie Ingredients supplies all of these plant-based ingredients, certified GMP+, and has developed a vegetable blend also, which offers the advantages to pet food manufacturers of reducing product handling and saving on storage space.

A vegetable blend is a unique combination of vegetables, suitable in different recipes. An example is a blend of carrot, green bean, parsnip, chicory root fibre and apple fibre.

### Combining profit and sustainability

With stable properties and of consistently high quality, these sustainable plant-based ingredients are increasingly finding their way into the market.

The unique advantage of plant-based ingredients from co-products is that they deliver food-grade quality, but at a better price, so offer exceptional value for pet food manufacturers. Furthermore, they contribute to pet food producers' ambitions to achieve sustainable sourcing of raw materials. ♦



**Karina Marsilje**  
Managing Director  
k.marsilje@duynie-ingredients.com  
duynie-ingredients.com

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# Pet products with purpose and passion

**M-PETS offers a range of unique and innovative pet products, effective distribution and excellent support to customers and partners internationally.**

## Full service provider

The M-PETS brand was established with a mission to make pet products with a purpose, and a passion to create moments of joy for all pets and their owners.

The company manufactures a wide range of innovative and high quality products for dogs, cats and small animals totalling over 1,500 SKU's and covered by more than 450 patents. It also provides full support to partners thanks to its three centres located in Belgium, China and the US.

## Design and manufacturing

M-PETS design and R&D teams are constantly striving to bring to market new products, materials and functionalities. In addition to the M-PETS branded products, customers can also benefit

from the manufacturing capabilities for their private label projects.

## Global distribution

In less than four years, the M-PETS brand has achieved a global presence in over 40 countries. M-PETS works across countries and continents with a large warehouse in China, where full consolidation is offered. Thanks to this modern warehouse, the brand can provide fast shipping and deliveries with maximum flexibility in terms of product selection.

## Building the future

The latest generation of new products is characterised by a strong focus on the needs of today's pets.

"The success of M-PETS is the result of an excellent mix between products, an

effective supply chain and the satisfaction of our partners and customers," says Roberto Bonfiglio, M-PETS Sales Director. "M-PETS aims to grow further internationally, building a strong platform of brands and unique products, to improve the shopping experience for our pets and their owners." ♦

## In 2019 M-PETS will be present with its stand at:

- Global Pet Expo (20 - 22 March, Orlando, US) booth number 2889
- Zoomark (6 - 9 May, Bologna - Italy) booth number D01-E12
- CIPS (20 - 23 November, Shanghai - China)

ZOOMARK – HALL 28, BOOTH D01-E12

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# It's all about texture

What signals super-premium quality to demanding pet owners choosing pet food for their pets? Texture is key.

## Appearance is everything

Pet owners want to treat their beloved pets in the best possible way, and that means feeding them super-premium quality food, close to human grade. Appearance is a huge influencing factor.

## Uniform looks cheap

Traditionally, the raw materials used for pet food commonly included ingredients like mechanically deboned meat and other products processed through an emulsifying process and steam cooked. The resulting texture can typically be described as similar to a sausage. A uniform, unappealing texture, with little or no fibrosity, it gives the impression of a cheap product.

To achieve a higher quality, fibrous and meaty appearance, would typically require combining these processed ingredients with higher quality raw materials, which, in turn, requires additional equipment.

## Technology can dial up texture

One option is Source Technology's PowerHeater. A unique and patented cooking process, it can process existing raw materials into pet food products with super-premium qualities. Lower quality grade raw materials are transformed into extremely fibrous products in one continuous and automatic process.

The growing demand for vegetarian and vegan solutions is also accommodated, as the process also transforms vegetable proteins into fibrous and nutritionally balanced products. The carbon footprint is low (0,1 kg steam / 0,005kW per kilo product), so contributing to creating products with low environmental impact.

## Make sure it is safe

A great part of animal welfare is also to serve products which are micro-biologically safe to eat. While pet food products are usually sterilised post packaging, the final product produced using the PowerHeater is already pasteurised and ready to eat. Automated temperature controls enable producers to sell the product as it is, packed in modified atmosphere packaging or as a frozen ready-to-eat product. This offers flexibility for many different applications.

Pet food processing technology that can transform processed raw materials into product with a fibrous texture is one solution to meeting the demand for appetising and appealing, human quality pet food. ♦



**David Primrose**  
Founder Synergy Food Ingredients  
david@sfi-ltd.com  
sfi-ltd.com







# Southern Europe

With Zoomark in Bologna just a few weeks away, we look at pet retail and pet owner trends in countries bordering on the Mediterranean: Spain, Greece and Italy itself.

Zoomark International 2019	63
Sun continues to shine on the Italian pet industry	64
Pet retail in Italy	66
Caring for pets in Spain	73
The Greek pet market 2.0	76



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# Zoomark International 2019

Zoomark International 2019 in Bologna, Italy will be bigger than before.

## Growing with the market

In over 30 years, the biennial show Zoomark International has grown along with the pet industry, able to understand its demands and support its development. At the same time the show has become increasingly international.

## Some facts and figures

The previous show in 2017 attracted 9,209 foreign buyers, a growth of 33% compared to 2015. It also set a new record with 100 countries represented. The Italian market itself did not disappoint either, with 18,522 attendees (+18%). Further growth in the number of Italian visitors is expected this year too.

From Monday 6 May to Thursday 9 May over 735 exhibitors will gather at the 4-day fair. At the 2019 edition, there will be eight national delegations: China, United States, Canada, United Kingdom, Brazil, Taiwan and, for the first time, India and the Czech Republic.

The 2019 event includes the Aqua Project. Around the area's focal point – two spectacular aquariums and an impressive pond – aquarium brands will have the opportunity to showcase their latest innovations. ♦

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# Sun continues to shine on the Italian pet industry

Recent figures show the positive trend in the Italian market is continuing, with increases for dog and cat food in both turnover and volume.



## Southern Europe

### Traditional pet shops still important

A report published in 2018 by the Italian association of pet food and pet care industries ASSALCO, together with Zoomark, shows that the total 2017 turnover for dog and cat food products reached €2,051 million (\$2,304 million), with a sales volume of 573,940 tons.

The mass market is still the main distribution channel for pet food in Italy, accounting for 56% of total turnover. Although specialised chains account for only 13% in value and 8% in volume, they are performing excellently, with 17% growth in both value and volume.

Traditional pet shops (over 5,000 in the country) are the main non-grocery channel. Despite representing a low volume of sales (17%), they generate almost a third of the total turnover.

### All food segments growing

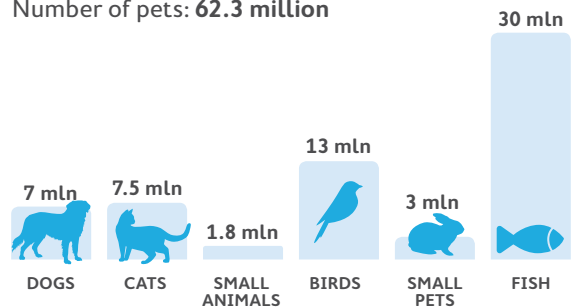
The cat food segment is slightly larger than the dog food segment, with 52.7% of the total turnover in all retail outlets and a combined value of €1,082 million (\$1,216 million). Dog food accounts for €969 million (\$1,089 million).

In 2017, all three main segments of dog and cat food (wet, dry, snacks and treats) grew in value. 52% of sales was dry food, 34% wet food and 14% snacks. Functional meals and treats continued to show the highest growth rate in the market. The best performances were in specialised chains, where cat snacks were up by 12.7% and dog snacks by 18.7%.

### Retail trends

For the first time the accessories segment is showing a slight decrease in sales in mass market outlets such as hypermarkets, supermarkets and small retail outlets.

Number of pets: **62.3 million**



Source: EUROMONITOR INTERNATIONAL

Their combined turnover was €71.9 million (\$80.8 million). Sales of care and grooming products such as shampoos and brushes, on the other hand, continue to grow (+15% in value over 2016).

### Consumer trends

67% of all Italian households include a pet. Current pet owner trends are an interest in natural/organic products and an increased awareness of the health and wellness aspects of pet products.

Specialisation, innovation and nutritional research are important drivers for Italian consumers when choosing pet food. They focus on the natural (or even organic) characteristics of premium pet food and on selected, traceable ingredients.

Pet owners in Italy also look more and more at the nutritional value of pet food, due to a wider interest in health and wellness. This has led to an increase in research into 'free from' products such as grain free, gluten free and sugar free. ♦



**Rita Buffagni**

Mediatric

PETS International agents in Italy  
media@mediatic.it  
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# Pet retail in Italy

**Farm Company ITALY**  
**The nature concept**

Farm Company launches its nature concept, with a life size Green Corner at Zoomark. A focused proposal of all green, eco-friendly accessories, snacks, toys, cosmetics, well depicted and displayed using visual supports such as cardboard trees and cubes, carpet leaves and much more. An innovative idea for shops who wish to stand out from the crowd and offer a sustainable shopping experience.

ZOOMARK – HALL 30, BOOTH A15



**Farm Company Srl**  
 info@farmcompany.it  
 farmcompany.it

**Italian b-to-b magazine Food published a report on Italian pet retail at the end of 2018. To sum it up: a lot is changing!**

**Success of pet shop chains**

There are more and more pet shop chains with at least seven branches in Italy and they are a huge success. The profit of a chain outlet is five times higher than the turnover of a traditional pet shop. There are several reasons why – wider variety of products, qualified employees and better service.

**Enhanced offerings at supermarkets**

Hypermarkets and supermarkets are still the strongest distribution channels for pet food in Italy. In the last few years, supermarket chains have discovered the appeal of the pet care segment.



As a result, they have improved and expanded their pet categories. The message that supermarkets are giving to Italian pet owners: 'You don't need to spend money at a pet shop, because you can now do all your shopping here, for your family and your pet.'

Hypermarket Auchan, for example, has declared its intention to start selling BARF ingredients in 2019. At Auchan, owners can find everything they need for their pets. Whether it is food, including bulk bags of dry food, or healthcare products. They will also offer new services to pet owners, such as e-commerce, dog sitting and grooming.

Other companies are active too. The Selex group, for example, introduced a natural and organic food line last year. They also improved their private label pet food lines.



And cooperatives like Conad and COOP are expanding their pet categories, in terms of quality as well as branded and private label products.

### Grocery retailers open pet stores

In 2014, the supermarket chain Iper opened a new kind of pet shop in Milan. Iper Pet was the first supermarket-owned pet shop. Two years later, Conad opened its first PetStore Conad, and COOP did the same with Amici di Casa. In 2018 there were already 11 Iper Pets and almost the same number of COOP Amici di Casa stores, while Conad have now opened their 25<sup>th</sup> PetStore and plan to open another 25 in 2019.

### Private labels and brands

In most pet stores, the assortment is larger than in a hypermarket or supermarket. Every shop presents their products in the same way, but they offer a bigger range of private label products (including premium and organic) than you would find in a supermarket.

Pet retail chains obviously offer their customers a larger selection of pet food brands than supermarkets. This includes organic and natural brands as well as veterinary diets. They also sell a wide range of snacks and pet accessories, including toys, beauty products and clothing.

### Service first

Many pet chains offer grooming plus additional services such as SPA and tag engraving. Most of them also organise special activities – agility classes, walking and vet conferences about pet behaviour, to name just a few. ♦



**Lavinia Fressura**  
Mediatic  
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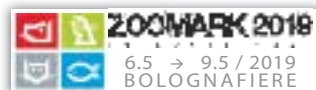
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**VAFO Praha**

[karolina@vafo.cz](mailto:karolina@vafo.cz)

[brit-petfood.com](http://brit-petfood.com)





# Caring for pets in Spain



**Spain is becoming more and more pet friendly. The average pet owner is a 36-year old woman.**

## Spanish pet market

AEDPAC is the Spanish pet industry association. It is currently creating a platform for reliable market data and the exchange of sector knowledge and insights.

Today's market is valued at €2 billion (\$2.3 billion). On average, pet owners spend €824 (\$944) a year on food, 93% of them buying quality brands. They spend €354 (\$405) per year on veterinary services, plus an average of €83 (\$95) on accessories. 86% of pet owners are women and they spend about three hours a day caring for their pets.

## Multifunctional pet stores

Spanish pet stores are approximately 390 sqm. Besides selling pet products, they have a small veterinary clinic and a grooming salon.

Most stores also have a kennel. Average annual turnover is €337,300 (\$386,000), with July and December being the busiest months. 73% of stores buy from distributors and 21% directly from the brand manufacturer. The remaining 6% buy online or at trade fairs.

Three-quarters of the retailers do not sell pets. Those who do mostly sell reptiles (23%), dogs (18%) or rodents (16%).

A quarter of the retailers now have an online presence, with growth expected in the coming years. 10% of Spanish consumers currently buy online. ♦



**Lluç Ferrer Aymar**  
President AEDPAC  
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# The Greek pet market 2.0



**‘Falling down is not a failure. Failure comes when you stay where you have fallen,’ said the Greek philosopher Socrates over 2000 years ago. How has this century’s economic downturn in Greece affected the pet care market?**

## Less money but just as many dogs

It will come as no surprise to hear that the Greek pet market has faced a downturn too, as consumers with less disposable income have had to buy cheaper products and forgo impulse purchases. The pet care market has declined in value, as the demand for lower-priced products has increased at the expense of premium brands.

Although cat ownership has decreased, dog ownership has only been marginally affected. So dog food has performed better overall, with a decline in value but no decline in volume.





One reason for this was increased discount activity by companies attempting to keep their market share. Price-sensitive consumers have taken advantage of larger packs, promotional discounts and lower category products.

### Rise of pet store chains

The Greek pet market is highly fragmented, with a small number of local pet food producers and largely imported pet products. No domestic pet food manufacturer has yet managed to establish a strong brand name or widespread distribution. Most of the domestic players also focus on economy products, whereas premium brands were the main beneficiaries of the rise of pet humanisation in the past few years.

Pet shops and pet superstores still offer the widest ranges of pet care products. They have the competitive advantage of being able to offer specialist advice, particularly valued by Greek pet owners as they slowly reduce their numbers of visits to veterinarians.

*Price-sensitive consumers have taken advantage of larger packs, promotional discounts and lower category products.*

Another feature of the recession is a change in the pet market's distribution channels. There is a rise in the number of pet store chains, with Pet City as market leader. The Greek market was originally dominated by family-owned independent pet shops, so this trend presents a dynamic change in the competitive landscape, similar to that of previous decades in the grocery market.

### Looking for deals online

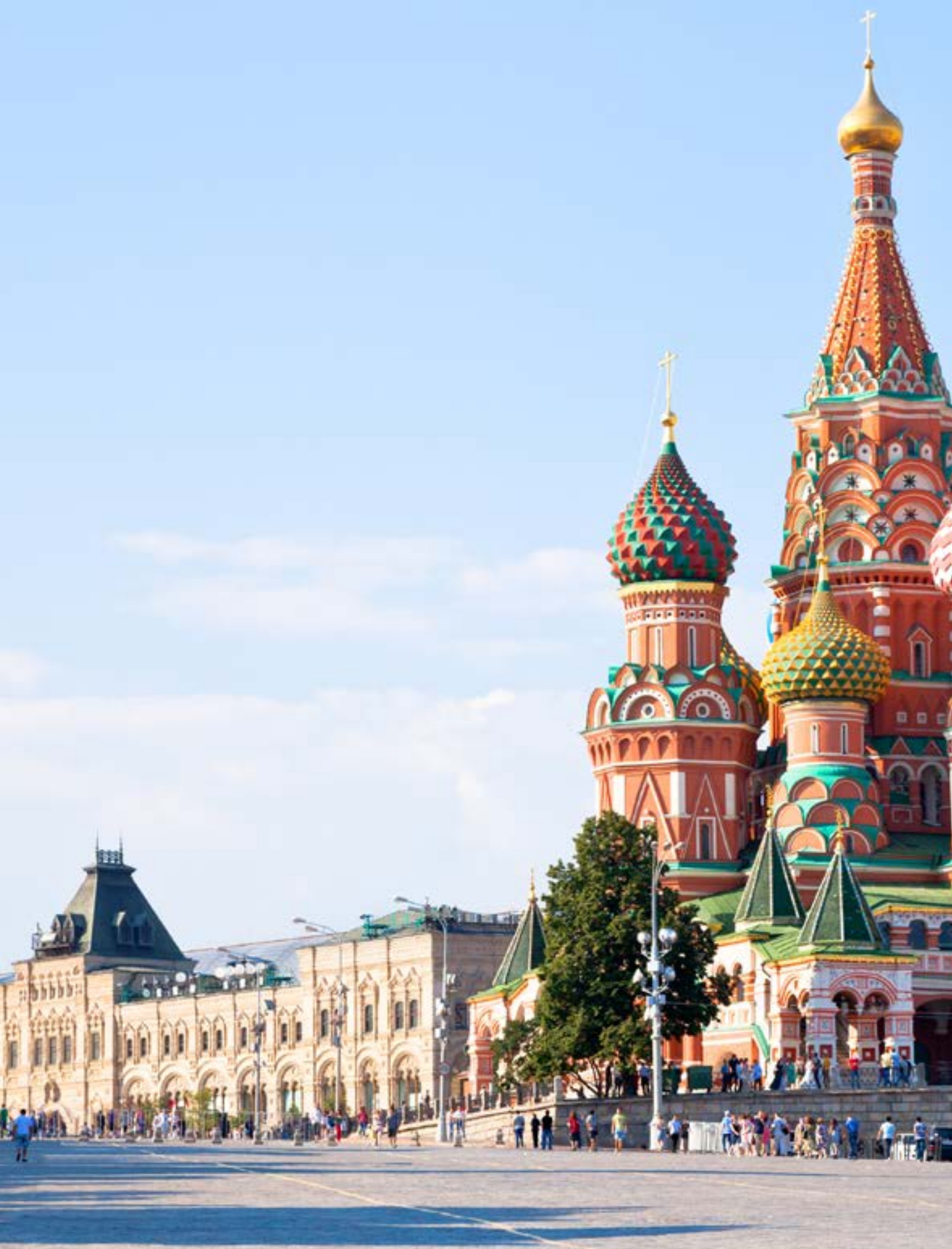
The economic situation has offered a great opportunity to internet pet retailing. Consumers like comparing the prices of sales promotions of a wide range of brands in the comfort of their own home and getting their purchases delivered to their doorstep, often at no cost. Convenience and lower prices, coupled with wider brand availability, are the primary reasons for Greek pet owners to visit e-shops. Internet was reported to be the most dynamic distribution channel in 2018. One word in a browser search can reveal an overwhelming number of e-shops offering deals, many of which do not have a brick-and-mortar store.

### Optimistic

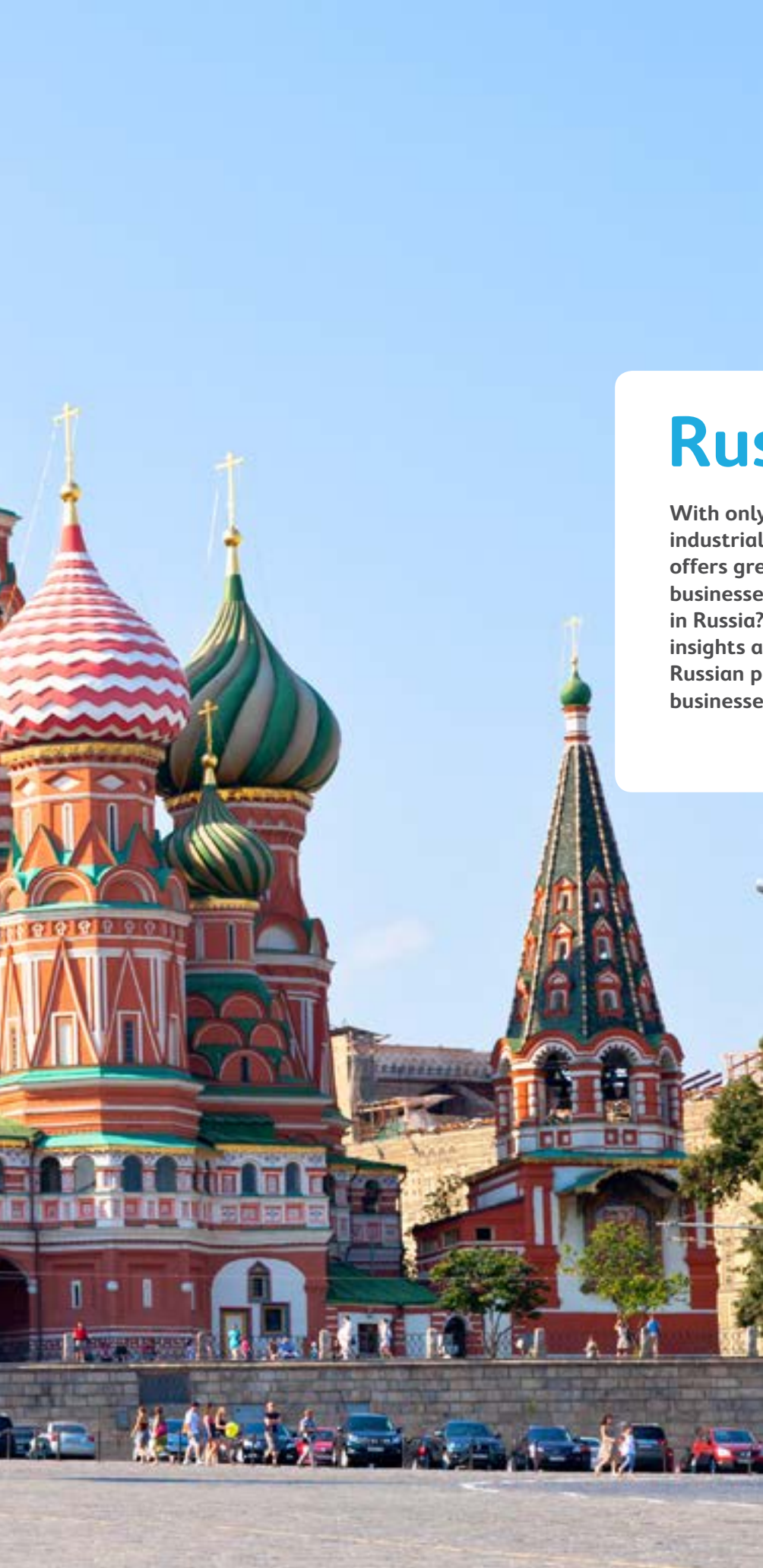
The Greek economy is now starting to reinvent itself after many difficult years, and is looking to the future with optimism. ♦



**Vassilis Goulielmos**  
Managing Director, WellDone Ltd.  
info@welldone.com.gr  
welldone.com.gr







# Russia

With only 15-30% of pets being fed with industrially made food, the Russian market offers great potential for international businesses. What are the latest developments in Russia? What are some interesting new insights and opportunities? And how are Russian pet companies developing their businesses? Let's find out!

Russian pet market trends	80
ParkZoo 2019 RUSSIA	83
Triol Group RUSSIA	84



# Russian pet market trends

The Russian pet market remains an extreme challenge and lucrative opportunity for the industry. With a growing pet population (54+ million dogs and cats) there is gold to be struck. But how do you change the heart of traditional 'table scrap' pet owners?

## Pet food market

In 2018 pet product sales in Russia grew by 1.2% in volume and 3.7% in value, at constant 2018 prices. The pet food market was valued at an estimated €2.4 billion (\$2.8 billion). Prices went up an average of 6–10% with growth in some categories up 30% during the year. All of this growth occurs while Russia is officially going through a 2.7% inflation.

## Categories

While dog and cat food sales stayed consistent, other categories like cat litter and anti-parasite products experienced modest growth. Bird and rodent food sales even changed to a positive dynamic growth rate, for the first time after several years of decrease. At the same time aquaria product sales continued to decline, as did the accessory categories, for example grooming.

The premium food category decreased in value, but not in volume, as consumers switched to cheaper products, for example private label products or premium products at promotional sale prices.

Some key figures in the Russian pet market are:

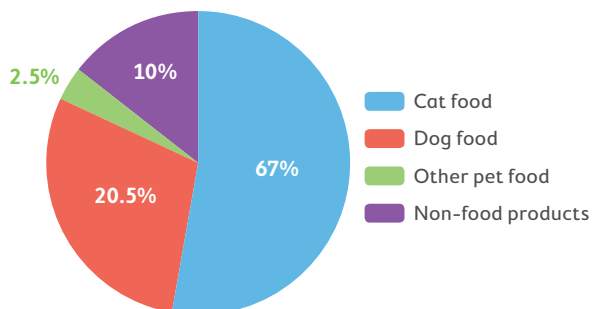
- 33% of households in Russia own a cat
- 15% of all dogs are fed with industrially made food

- 75% of the dog food market is dry food
- Dry dog food is on average 22% lower in price than wet dog food
- Cat food makes up for 67% of the petfood market

## Retail

Russian pet retail has been facing significant changes. In 2018, large and financially strong non-specialty players entered the market with specialised pet-projects. Detsky Mir (the largest children product retailer), Lenta (a large grocery player) and pharmacy businesses are opening pet stores. Powerful national specialty players like Bethoven, Four Paws and Petshop keep strengthening their positions by increasingly opening stores in the regions.

## Russian pet food consumption



### Major trends

Some major trends are:

- The structure of the Russian pet industry will continue to change, not only within retail but also in the supply chain. Wholesalers will lose importance as manufacturers are increasingly able to directly supply retailers and end consumers.
- The Russian market is supplied by 80% domestically produced pet food, that is increasingly replacing imports. Multinational corporations are building more and more facilities on Russian turf. Mars and Nestlé have local Russian factories. And international manufacturers like Aller Petfood, which focusses on private label production, are also following suit.
- Online sales increased by 55% in 2018 and continues to increase rapidly.

Despite the modest growth of the whole pet market, major distributors with strong strategies and mature marketing policies announced an average of 10–15% growth in sales, some of them even growing 36%. This illustrates that the Russian market is experiencing share redistribution between future oriented companies and companies that have not managed to adapt to change.

The Russian market potential is huge and is expected to grow to €10 billion (\$11.3 billion). Entrepreneurs are looking for opportunities to enter the Russian market and to launch their products. To succeed they need:

- a qualified local partner who is aware of the administrative and legislative environment
- a very clear strategy to actively contribute to the business process, and
- to understand – and not underestimate – the power of promotional and marketing support from the Russian partner. ♦



**Yulia Dolzhenkova**  
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- Own unique, patented products and composition formulas
- GMP-standard manufacturing

The company's main drivers are anti-parasitic products: flea, tick and deworming solutions. It is passionate to provide the most effective, safe and affordable products on the market.

More than 7 million Russian pet owners chose Ekoprom's anti-flea products to protect their pets in 2018.

The company has been operating on the market for 18 years. Its product range comprises over 300 SKU's of veterinary medicines and hygiene products.

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**Radius** RUSSIA

## Your logistics partner in Russia

**Radius offers comprehensive logistics support and customs clearance services, focussed on pet food and other pet products.**

For over 15 years the company has been helping the Russian pet product market to develop, by offering its customers new and advanced opportunities.

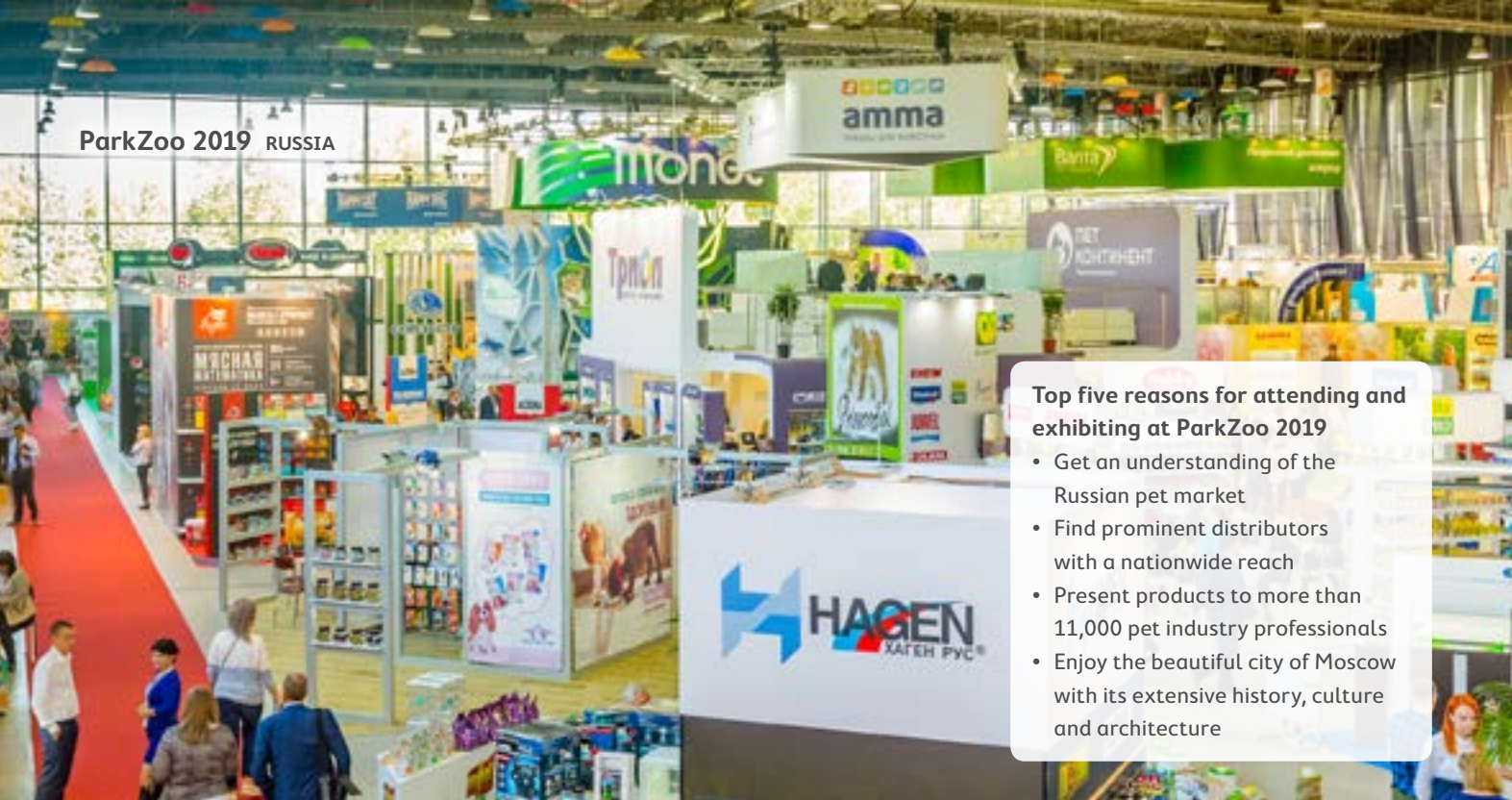
Its 70 qualified specialists highly value an individual approach, business etiquette and confidential relationships with clients.

The company is a licensed customs representative that is able to significantly streamline and speed-up the customs clearance process, while minimising possible risks.

Radius provides customs clearance at all marine, land and air terminals in Russia and all types of transportation and logistics services. Registration of permits and consultation on export & import issues is one of the core specialties of the company.

**Radius Ltd.**  
info@radiusltd.ru  
radiusltd.ru





**Top five reasons for attending and exhibiting at ParkZoo 2019**

- Get an understanding of the Russian pet market
- Find prominent distributors with a nationwide reach
- Present products to more than 11,000 pet industry professionals
- Enjoy the beautiful city of Moscow with its extensive history, culture and architecture

# ParkZoo 2019

September still seems far away, but as Russia is highlighted in this PETS International edition, the ParkZoo 2019 exhibition is an interesting topic for those seeking opportunities in this country of 54 million cats and dogs.

## When and where?

18-20 September 2019 in the Sokolniki Exhibition Centre in Moscow.

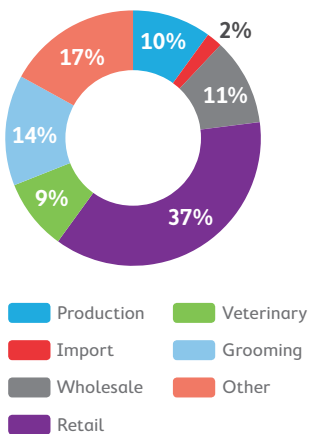
## What to expect?

An estimated 11,000+ professionals from 30+ countries are expected and over 300 exhibitors will display their products and services. For some non-Russian companies it has been quite a challenge to get a foothold in Russia. The exhibition offers a podium to get connected to the right local partners, find information on business administration, legislation, trends in Russia and much more.

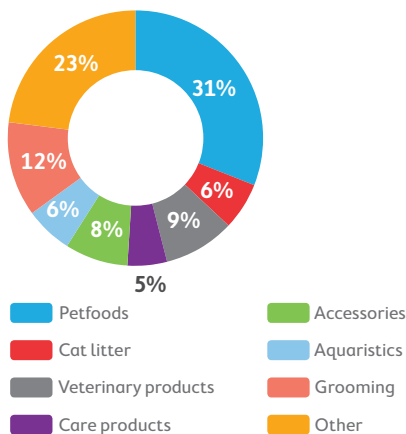
## Facts from ParkZoo 2018

Now, let's have a look at some interesting statistics on the visitors and exhibitors of ParkZoo 2018.

By type of activity (%)



By category of goods sold (%)



## Travel information

The exhibition organiser has arranged special accommodation rates for exhibitors and visitors, in addition to visa support for exhibitors. ♦

♦ **ParkZoo**  
info@parkzoo.ru  
parkzoo.ru/en



Triol Group **RUSSIA**

# From a small kitchen to a 20,000 sqm complex

**Triol Group just opened a high-tech warehouse and is ready to be part of the global pet industry.**

## Who is who?

Triol Group is a leader in the Russian pet market, with over 25 years of experience in manufacturing and wholesale.

The company manufactures under private label as well as under its own label (Triol, Cat Step, Laguna, Gamma), covering all basic groups of pet products such as accessories for dogs, cats, birds, small animals, fish and reptiles.

The company is headquartered in Moscow and has a broad network throughout Russia. It is involved in the production of plastic articles, a garment factory, promising retail projects, and two major trading companies – ‘AMMA’ and ‘Pet-Continent’.

## Credo

Above all, a customer is a friend. This is the permanent credo of the company giving priority to warm, sincere, and

friendly relations. Its customer service is based on open dialogue, with an impeccable reputation of fair principles and right values being its permanent warranty.

## Dreams come true

The company has major dealer contracts: it presents western premium and super-premium pet goods to the Russian market and enjoys fruitful cooperations with well known European and American partners (Brit, Zolux, Hagen, Juwel, Sera, Gimborn, Wellness).

The two different approaches allow for doing business comprehensively and satisfying the market needs to the fullest.

In 2018 the company settled in the Moscow suburbs, where the ambitious project of building a ‘new home’ with a total area of 20,000 sqm began. The A and A+ logistics complex with

an electronic warehouse management system, controlling all processes, became the largest in the Russian pet industry. The result is clear: the work and shipments are now done much faster, which benefits the end-consumer. In addition, all warehouse operations have become both comfortable and more efficient.

Could anyone have imagined that the idea to sew dog collars out of leather belts – an idea which came about 25 years ago in a small kitchen – would lead to a company of this scale? Ambitious plans and assertiveness of the Triol Group leaders have been the company's main driving force for years, turning a once amateurish business into a main part of global pet industry. ♦

♦ **Triol Ltd.**  
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# Marketing

Faced with today's informed consumers, businesses are re-inventing themselves with sustainable products and convenient services. Of course all of this is available 24/7 at the touch of a button.

E-commerce and Internet of Things	
turn US pet market upside down	88
Vet market builds on consumer trust	90
Pets & Money Summit	
United Kingdom	92



# E-commerce and Internet of Things turn US pet market upside down

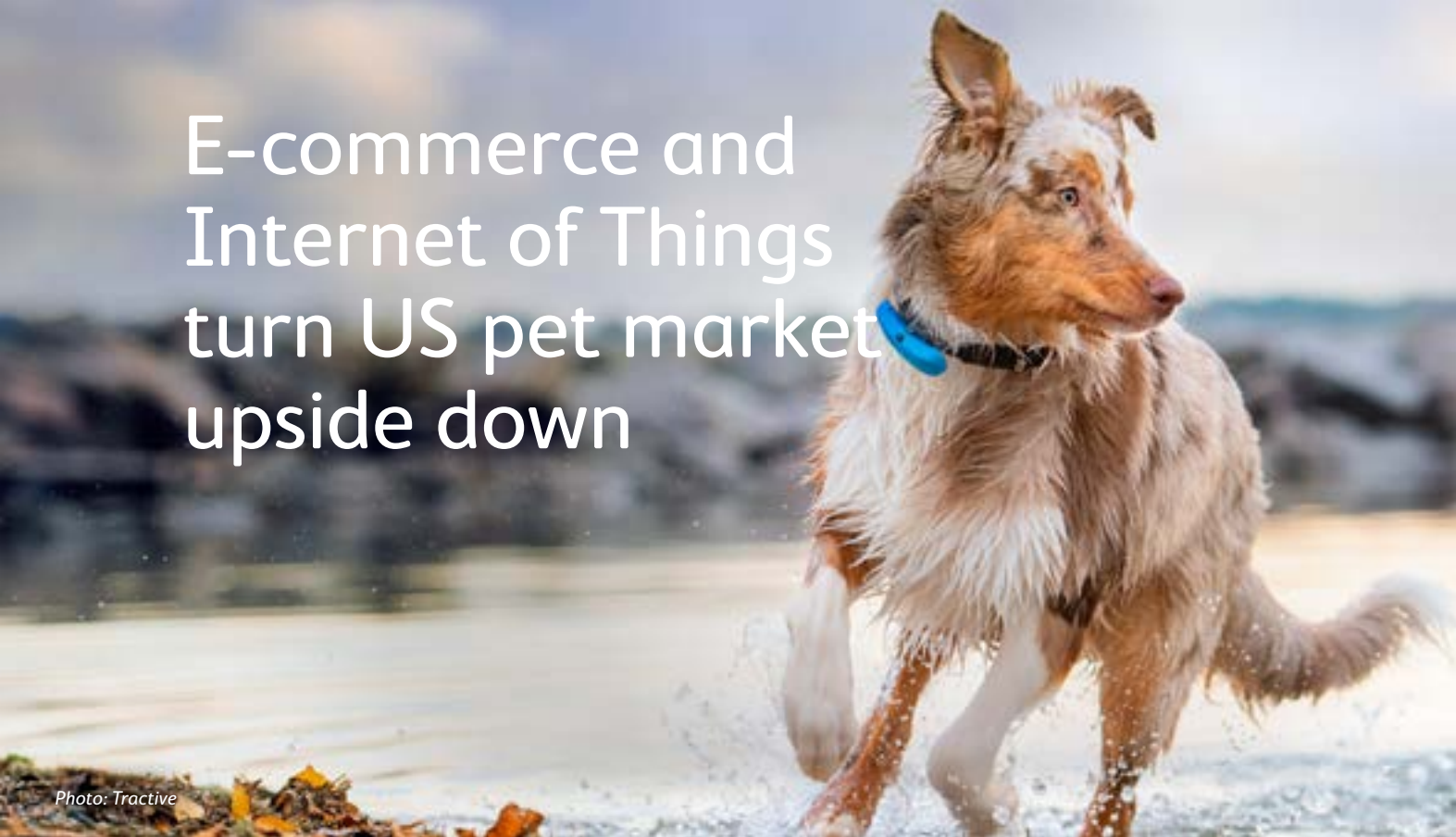


Photo: Tractive

**Internet advances and e-commerce are redesigning how consumers are shopping and interacting with their pets. Consumers are ready, but are retailers?**

## **Pet e-commerce**

Packaged Facts places US pet product sales at \$52 billion (€45.8 billion) in 2018, up 4% over 2017.

E-commerce has made enormous strides and will grow to 23% of the market by 2023, making it second in market share only to the brick-and-mortar sales of pet specialty chains.

As the fastest growth channel for pet product sales, the internet has been disproportionately responsible for helping to keep the US pet industry on an upward track. During 2018, nearly \$10 billion (€8.8 billion) worth of pet products were sold online. The number of US households purchasing pet products online is also on the ups, nearly quadrupling from 3.5 million in 2013 to 13.3 million in 2018, according to Simmons national consumer surveys.

Some of the e-commerce gains are clearly coming at the expense of brick-and-mortar, but pet e-commerce is so strong that it is elevating overall market sales.

The result is that any serious pet product marketer needs to be thoroughly represented online.

Amazon continues its pet market march, reaffirming its commitment by financially backing HABRI (Human Animal Bond Research Initiative), adding additional private-label pet product lines, retooling warehouses to facilitate the handling of heavy pet food and litter, and positioning itself as a pet information resource.

## **Brick-and-mortar fight back**

Looking to offset additional losses to Amazon and other pureplay e-tailers, brick-and-mortar-based retailers are realigning as omnichannel operators via acquisitions and initiatives designed to integrate e-commerce. Specialty shops and mass merchandisers are implementing new forms of order fulfilment, including 'click-and-collect' (online ordering coupled with in-store pickup) and same-day delivery.



*Some of the e-commerce gains are clearly coming at the expense of brick-and-mortar, but pet e-commerce is so strong that it is elevating overall market sales.*

Pet superstores are also emphasising smaller store formats (PetSmart launches Groomery, Petco introduces PetCoach,) and expanding petcare services.

### Mass premiumisation

By accelerating the breakdown of the commercial and conceptual barriers between pet specialty and the mass market, moreover, the winds of internet change are also driving brick-and-mortar mass premiumisation. With super-premium/natural products accounting for more than 70% of sales in the pet specialty channel, much of the remaining potential for converting pet owners to higher priced fares lies in supermarkets and mass merchandisers.

Within months of its 2017 cross-over into mass channels, Blue Buffalo became one of the top mass-market brands, which led to the company's 2018 acquisition by General Mills. During 2017, both Nutro and Nature's Recipe 'went mass,' and Mars launched CRAVE, a super-premium-type product created specifically for the mass channel.

With entrenched super-premium-type mass brands like Rachael Ray Nutrish fighting back, Packaged Facts has observed a spike in advertising and promotional activity, including virtually back-to-back (and head-to-head) TV commercials during prime time. This heightened competition will further contribute to a natural pet food groundswell in the mass channel, even as super-premium brands continue to advance online.

### Internet of Things

E-commerce is but one facet of a much larger tech trend that is changing how pet owners interact with pet products and services, as well as with their pets. With internet advances, much of the innovation in pet products and services involves the Internet of Things (IoT), or the interactions of tech devices without human involvement.

Within the pet market, examples of IoT abound – in pet bowls that automatically reorder food for home delivery, cameras that allow pet owners to dispense food or medications remotely, and smartphone-linked trackers that monitor not just the pet's location but also its vitals and behaviour, compiling data logs and alerting pet owners and veterinarians to potential health problems.

Packaged Facts 2018 survey shows that 13% of dog owners purchased tech-driven pet products. Among these recent purchasers, 24% had purchased pet cameras and another 15% had purchased tech-based pet trackers. The beauty of such products is that they simultaneously automate humdrum tasks and encourage pet owners to be more involved with their pets, in the flesh and from afar. ♦

### Technology-based pet product purchasing patterns, 2018

Pet camera/video system	24%
Tech-based pet tracker or tracking collar (including activity monitors, GPS collars)	15%
'Smart' pet door (microchip or automated door)	14%
Tech-based toys (Bluetooth or programmable ball launchers, fetch toys)	12%
Bluetooth or microchip feeder/treat dispenser	11%
Tech-based training device	5%
Other tech-based product	31%

Source: Packaged Facts August-September 2018 Survey of Pet Owners



**David Sprinkle**  
Research Director and Publisher  
dsprinkle@marketresearch.com  
marketresearch.com



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# Vet market builds on consumer trust



**Overwhelming spending options have lead consumers to rely on veterinarians advice and vets are taking notice.**

## Regular vet visits

Pet owners are visiting vets more routinely than ever before. The increased demand has seen a significant transformation in the format of vet practices, with around 40% of UK vet practices owned by corporates by the end of 2018. This combination has opened up opportunities for retail sales on a much larger scale. Alongside the demand for vet services, the rapid pace of expansion within pet retail has included larger retailers adding veterinary services to their portfolio.

Industry giant 'Pets at Home' has added veterinary clinics in-store for some years now. However, there has been trouble in paradise, and 'Pets at Home' (having opened 250 vet practices in the last 5 years) is now looking to close some practices, mainly due to the shortage of vets available.



Nevertheless, as expected, this marriage of the two industries brings benefits: economies of scale, efficient protocols and, of course, recognisable branding aimed to build consumer trust.

Owners are now encouraged to not only come for routine anti-parasite treatments, vaccinations and boosters, but also for weight checks, puppy and kitten 'parties', education on disease, insurance, and also shopping.

### Medical authority wins

Vets have the advantage of medical authority, so products aligned with their advice take on more prominence, a rare situation all suppliers should take advantage of – by offering everything from the more-expected range of recommended foods, grooming supplies, dental care and supplements to now leashes, accessories and toys that educate and are welfare-friendly. In addition, vet retailers can add grooming services, DIY bathing facilities, even daycare, pet boarding and training services to their portfolio. This also allows vets to optimise the existing facilities throughout the day.

Innovative vets have even begun offering socialisation groups for first-time clients bringing their young pups and kittens for check-ups. Recognised as important, especially for young dogs, a well run puppy 'playgroup' builds a strong client community and creates the perfect environment for consumers to get everything they need for the ultimate pet home.

### E-commerce is still a threat

As with all physical retail stores, the potential threat of losing customers to online purchase is still clear. Nearly 70% of brick-and-mortar pet retailers (Pet Business survey 2018) stated that internet outlets represent their most significant competition. Vet retail can bypass this threat in many aspects – providing exclusive pet foods that maintain special diets, and favouring vendors and brands that do not sell via larger online retailers such as Amazon, which means margins would not have to be cut to compete.

As all retailers would state, the key to attracting and retaining sales is by providing the highest level of customer service. This has never been more apparent than in a veterinary setting, where the welfare of the animals in their care is paramount, with highly qualified staff that are dedicated to their profession. Such a powerful approach should not be minimised by simply placing a few toy stands in the reception area.

The opportunity is clear, an ethical means of providing pets with the care and supplies they most need, in a health-based setting. ♦



**Karen Wild**

Dog trainer and pet behaviourist  
info@pawprintpets.com  
pawprintpets.com





# Pets & Money Summit United Kingdom

This February, Pets & Money organised their first ever European edition. During the conference, eager startups pitched to investors in hopes of getting the next funding round and investors deliberated with the intention of finding the next unicorn startup in the pets industry.

### Promising startups

Trends amongst these young companies were internet of things, apps and data collecting applications. The jury selected the most promising 12 startups in advance and watched them take the stage to wow the audience at the event. Keep an eye out for these next top tiered startups:



### Actijoy

This startup helps to prolong dogs' lives by up to two years while reducing veterinary cost thanks to three mutually connected devices:

The Health & Activity Tracker, a set of smart WiFi Food Water bowls, and the connected app. This all-in-one solution measures different levels of activity as well as sleeping patterns and rest; it keeps track of a dog's food and water intake and provides a dog parent a complete overview of their dog's life.



### AlphaPet

This company is digitalising the pet market with direct to consumer sales through its e-commerce platform [petsPremium.de](#) and as a digital builder of pet food brands through its multi-channel distribution (online and offline). Besides that, it has its own pet food brands.



### Bella & Duke

A subscription service, offering a raw species-specific diet for dogs, suited to today's consumer. The meals are directly home-delivered and the model is based on an easy-to-manage subscription. The food comes in nine different flavours, and boxes can be bespoke to pets' health needs, so it is easy for pet parents to vary the proteins and have healthy, happy pets.

## Marketing



### Dogo

The first dog training app offering personal feedback through video exams. Users have to film their dogs progress, which is reviewed by dog specialists. With Dogo, over 60 different commands can be taught, including a possibility to participate in a weekly photo challenge. The community speaks nine different languages.



### Entoma

This company uses innovative and sustainable protein sources, instead of the traditional, resource heavy proteins, used in food today. A 100% natural pet food for dogs based on eco-friendly insect proteins combined with high-quality natural and nutrition ingredients.



### Hownd

A startup delivering certified natural pet care products in the segment of health, wellness and hygiene products. Specifically designed for dogs of all breeds. Hownd is accredited by the Ethical Company Organisation.



### K9 Connectables

K9 offers a range of dog toys that mentally stimulate and entertain dogs, while promoting oral hygiene. The trapped treats are forcing dogs to use their brain to work for rewards.



### Mishiko

An app that assesses the dog's body condition, creates a fitness plan and provides real-time coordinates to reduce the risk of a lost dog. The app also offers a wide range of data, aimed at reducing the risk of health issues in dogs.



### Moggie

Using artificial intelligence and veterinary science, Moggie's collar shows cat owners – through an app – how their cat is feeling, based on its activities. Cat parents can easily monitor their cats' health, wellbeing, and routines at the touch of a finger.



### Pawshake

Through this service pet parents can discover and arrange pet care with local pet sitters, dog walkers, and daycare providers. The platform offers premium insurance for all services booked through Pawshake, pet photo sharing, secure online payments, and 24/7 customer support.



### Pawsquad

A veterinary telehealth service where UK-registered vets provide consultation about the condition of pets through video or live text chats. Consultations are available 24/7 using a desktop or mobile device.



### Petplan

A technology-enabled direct-to-consumer pet insurance MGA and pet tech company. Petplan developed a customer-centric digital pet app and Insurtech, offering free cloud-based services, real-time record management, smartphone applications, and pet GPS location services. ♦



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## Calendar of events



### PLMA 2019 'World of Private Label'

21 – 22 May 2019

RAI Exhibition Centre,  
Amsterdam, The Netherlands

🔗 [plmainternational.com](http://plmainternational.com)



### Aquarama

31 May to 2 June 2019

Guangzhou Import & Export Fair  
Pazhou Complex  
Guangzhou, China

🔗 [aquarama.com.cn](http://aquarama.com.cn)



### Superzoo

20 to 22 August 2019

Mandalay Bay, Las Vegas, United States

🔗 [superzoo.org](http://superzoo.org)



### Pet Fair Asia 2019

21 to 25 August 2019

Shanghai New International Expo Center  
Shanghai, China

🔗 [petfairasia.com](http://petfairasia.com)



### PET South America

21 to 23 August 2019

São Paulo Expo Exhibition & Convention Center  
São Paulo, Brazil

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



### ParkZoo

18 to 20 September 2019

Sokolniki Exhibition and Covention Centre  
Moscow, Russia

🔗 [parkzoo.ru/en](http://parkzoo.ru/en)



### PETZOO Türkiye 2019

31 October to 3 November 2019

Istanbul Expo Center

Istanbul, Turkey

🔗 [petfuari.com](http://petfuari.com)



### CIPS 2019

20 to 23 November 2019

National Exhibition and Convention Center,  
Shanghai, China

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

## Contact us

**Austria, Belgium, Germany, Hungary, Netherlands, Portugal, Scandinavia, Spain, Switzerland**

Miguel Mendes de León,  
Agri Cross Media  
+31-6-81543366  
[miguel@agricrossmedia.com](mailto:miguel@agricrossmedia.com)

**Brazil, Chile, Colombia, Peru**

Natalia Coelho de Miranda  
Top.Co. Comunicação  
+55-1932318236  
[nataliamiranda47@gmail.com](mailto:nataliamiranda47@gmail.com)

**China, Hongkong, Macao, Taiwan**

Meadow Zhang  
+86-10-88102269  
[zhanghj@chgjie.com](mailto:zhanghj@chgjie.com)

**France, Monaco**

Alain Girardet, g i r e x agencies  
+33-6-0828-1482  
[girardet.alain@wanadoo.fr](mailto:girardet.alain@wanadoo.fr)

**Greece, Bulgaria, Cyprus**

Vassilis Goulielmos,  
Welldone Ltd.  
+30-210-7794529  
[info@welldone.com.gr](mailto:info@welldone.com.gr)

**Italy, Malta, San Marino**

Rita Buffagni & Lavinia Fressura,  
Mediatic  
+39-0522-383620  
[media@mediatic.it](mailto:media@mediatic.it)

**Japan**

Anthony Yamashita,  
PETS M&C  
+81-736-36-5526  
[anthony@pets-mnc.com](mailto:anthony@pets-mnc.com)

**Poland**

Mateusz Karatysz,  
Media Experts sp. z.o.o.  
+48-61-820-41-75  
[mateusz.karatysz@rynekzoologiczny.pl](mailto:mateusz.karatysz@rynekzoologiczny.pl)

**Russia**

Yulia Dolzhenkova,  
Zooinform  
+7-4903-6132812 | +357-9648-5560  
[us@zooinform.ru](mailto:us@zooinform.ru)

**South Korea**

Hayen Jung,  
AT Bio Ltd.  
+82-31-5341663  
[atpetfood@hotmail.com](mailto:atpetfood@hotmail.com)

**Sri Lanka, India, Pakistan**

Sanjana Wasala  
+94-7736998991  
[drwasala@gmail.com](mailto:drwasala@gmail.com)

**Turkey**

Selçuk Çetin  
+90-212-321-10-02  
[selcuk@ulusalfair.com](mailto:selcuk@ulusalfair.com)

**United Kingdom, Ireland**

Andrew O'Kelly, KOA Media Limited  
+44-1252-843431  
[andrew.okelly@koamedia.co.uk](mailto:andrew.okelly@koamedia.co.uk)

**Ukraine**

Sergii Kondrat,  
Vet Zoo Profy  
+38-044-592-2167  
[sergy@vetzoo.in.ua](mailto:sergy@vetzoo.in.ua)

**United States, Canada**

Glenn Karaban,  
Karaban Media Services, Inc.  
+1-212-840-0660  
[gkaraban@karabanmedia.com](mailto:gkaraban@karabanmedia.com)

**Rest of the world**

PETS International &  
GlobalPETS Community head office  
+31-33-422-58-33

## Advertisers index

### In this issue

AFB International .....	45, 55	Landguth Heimtiernahrung GmbH .....	28, 30, 32
Aker BioMarine Antarctic AS / QRILL Pet .....	50	Laroy Group nv .....	94
AM Nutrition AS .....	15	M-Pets sprl.....	56
American Pet Products Association APPA...21, 63		Mealberry GmbH .....	48
Bacterfield GmbH .....	76	Mowi Markets Norway AS.....	24
BAMA SpA .....	34	P.L.A.Y. Pet Lifestyle And You Inc. ....	81
Bogar AG .....	36	Pet City SA.....	94
Bühler AG, Division Food Processing.....	52	Pet Fair Asia/ VNU Exhibitions Asia Ltd.....	69
China Great Wall Int'l Exh. Co., Ltd. / CIPS .....	4	Pet Market Spain .....	86
Company of Animals.....	17	Radio Systems Corporation / PetSafe .....	18
DNP S.A. / Piper.....	2	Shandong Luscious Pet Food Co., Ltd. ....	inside back cover
Fish4Dogs.....	38	Sharples Pet Ltd. ....	62
Global Pet Expo.....	58	Tropical Tadeusz Ogrodnik.....	20
Heiniger AG.....	18	Tropiclean .....	37, 75
Holland Animal Care .....	inside front cover	Trouw Nutrition.....	8
Iris Mednarodna trgovina d.o.o. / Earth's Goodies.....	72	United Petfood Producers nv/sa .....	90
Italfeed Srl.....	64	Upscience SAS .....	13
Kong's (Aust) Pty. Ltd. / Aqua One.....	19	Yantai China Pet Foods Co., Ltd. / Wanpy.....	85
Laboratoire Francodex .....	71	Zolux s.a.s. ....	back cover

## Upcoming issue | Advertising deadline: 19 April 2019 | Publication date: 31 May 2019

See page 5 for subjects. Contact head office (below) or local representatives (page 95).

### Colophon

#### InterMedium Publishers

PO Box 1719, 3800 BS Amersfoort, The Netherlands,  
+31-33-4225833, info@pets.nl

CEO: Corine van Winden, corine@pets.nl

COO: Gerard de Niet, gerard@pets.nl

Communication & Event Manager: Desirée van der Hoeven, desiree@pets.nl

Designer: Jack Waas

Senior editor: Heiny van den Ham

Marketing & Communication Executives: Brittany Emery, Benjamin de Niet

Editors: Lynn Radford, Marita van Oldenborgh, Martine Croll,

Mandy Wolters-Savage,

Printing: Drukkerij Ten Brink, The Netherlands

### Technical details

PETS International is perfect bound

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

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

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

spread: 416 x 273mm\*

third page vertical:

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68 x 273mm\*

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208 x 131mm\*, 186 x 106mm

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