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Highlights this issue



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Food

The search for alternative proteins continues, and e-commerce is getting more and more important in the pet industry, enabling niches to make their step to the forefront.



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Ingredients and production

Sustainable production of additives and ingredients can increase the cost-effectiveness of the supply chain, both upstream and downstream.



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Accessories

With pets dressed up as their pet parents' favourite movie character and eating almost the same meals, personalisation becomes increasingly important as a marketing strategy.



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Private labels

Private labels were conceived as the cheaper alternative to A-brands. Now they have become brands themselves, often exclusive.

And further in this issue

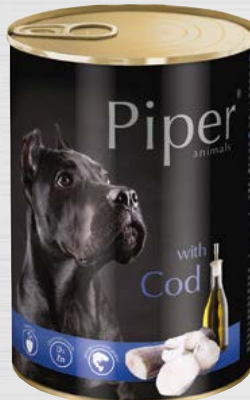
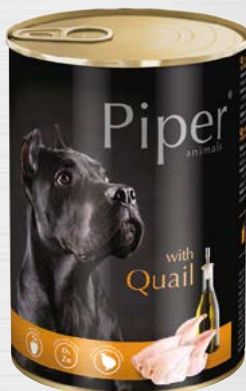
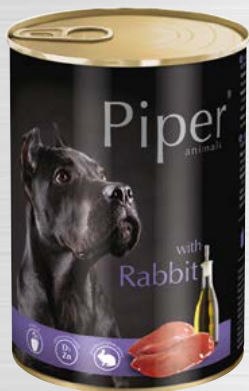
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Weird and challenging times!

Suddenly the world has been turned upside down. We all work from home, waiting to see what will happen next. And there will be no Interzoo this year!

As life has become very hard, we may count ourselves lucky in this wonderful industry. Pet shops in most countries are considered essential and allowed to stay open. Online platforms are busier than ever, including those that sell pet products. There are, of course, still challenges for the industry to face, as managing supplies is often more difficult than usual.

When the coronavirus curve begins to flatten, we will look at the world – and our industry – in terms of before and after. The economy will recover, and in the meantime many of us have discovered the benefits of digital solutions. A lot is set to change.

While at home, pet owners have developed a closer relationship with their pets, particularly dogs and cats. Some have had more time to walk and play with them.

Although this bond with their pet will remain unchanged after the crisis, how will their shopping behaviour have changed? Will online shopping stay as popular as it is now? How will – and can – the traditional pet retail sector respond?

Will international business contact continue to take place digitally rather than face-to-face and what effect will that have on trade fairs? And on international travel?

PETS International has already anticipated all this with a new home page and the launch of a digital Innovation Showcases platform – an easy way to present your new products to the global pet industry.

There are many questions that remain unanswered for now. Meanwhile we have put together this issue with a range of topics, global trends and other interesting information. Read, learn and be inspired!



Corine van Winden, CEO



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Upcoming issue June 2020



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Grooming

Middle East

Market trends and developments
Automated shopping

June issue | Advertising deadline: 22 May 2020 | Publication date: 19 June 2020
Contact head office (see page 96) or local representatives (see page 95).

Pet industry highlights



PETZOO Antalya

18 to 21 June 2020
Expo Antalya Exhibition Center
Antalya, Turkey
petfuari.com/antalya/en/petzoo-antalya

Pet Fair Asia

19 to 23 August 2020
Shanghai New International Expo Centre
Shanghai, China
petfairasia.com/en



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Correspondence may be edited for clarity or length.

Nestlé Purina PetCare acquires Lily's Kitchen



Nestlé Purina PetCare has acquired natural pet food brand Lily's Kitchen, the UK's leading producer of premium wet and dry natural foods for dogs and cats. Their product range perfectly complements Purina's existing brand portfolio.

Established twelve years ago in founder Henrietta Morrison's kitchen in London, Lily's Kitchen has become an internationally recognised £85 million (€97 / \$105 million) retail brand. The company will continue to be run as a stand-alone business from its base in London.

Pets at Home beats forecasts after demand spikes

Pets at Home has seen in-store and online sales increase since the start of the COVID-19 pandemic and now expects annual profits to beat expectations.

The retail group experienced an 'exceptional' level of demand because of the coronavirus outbreak. This was due to existing customers increasing their average basket size, by pulling forward purchases, as well as new customers buying pet products and requiring animal healthcare services. The company said its previous investment in omnichannel capacity, new customer acquisition channels and subscription services had allowed it to meet the sudden increased demand.



PETS International launches Innovation Showcases digital platform

PETS International magazine is a proven concept for reaching pet professionals globally. Now, companies in the pet industry can benefit from our brand new digital platform too. Innovation Showcases can be used to spotlight new products and achieve additional impressions via our offline and online channels.

The digital platform will only present innovative products, in seven categories:

- Food & Snacks
- Ingredients & Production

- Accessories
- Litter
- Healthcare & Grooming
- Private Label
- Other

A simple click takes the website visitor to the category of their choice.

Further information:
globalpets.community/innovation-showcase

Pet industry highlights

Yantai China Pet Foods Group (Wanpy) invests in new Cambodia factory



The new factory, named I Tao Pet Supplies (Cambodia) Co. Ltd., is located in Sihanouk Province and covers an area of 27,000 sqm. It is the largest pet treats plant in Cambodia that specialises in producing jerky and rawhide treats for pets.

As a leading pet treats manufacturer, the company has designed its Cambodia factory to meet the same high international standards as its plants in the US, Canada and New Zealand, manufacturing to a high quality and providing many options for industry customers.

United Petfood acquires IAMS pet food plant



International manufacturer United Petfood has acquired the Dutch IAMS Europe B.V. plant from Spectrum Brands. The site currently manufactures the IAMS and Eukanuba brands and will continue to do so in the future. United Petfood is only taking

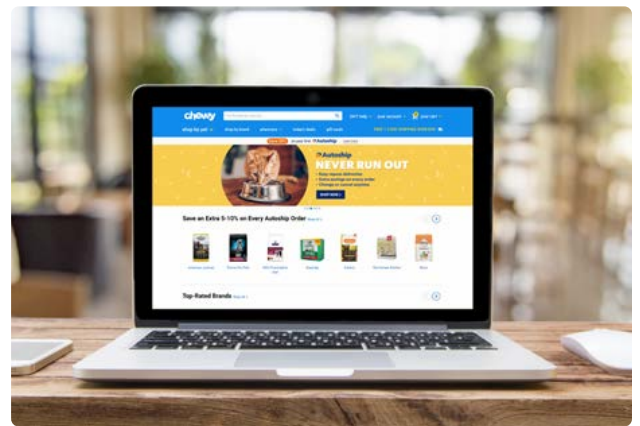
over the plant. The Spectrum Brands organisation will continue to own and market the brands.

Chewy stock benefitted from booming online pet food sales

Chewy has reported on the fourth quarter of 2019. Results were largely in line with expectations, with sales for the quarter up 34.7% over the previous year, at \$1.35 billion (€1.23 billion) and a net loss of \$60.9 million (€55.8 million), which included share-based compensation of \$45.9 million (€42 million).

While Chewy currently appears to be benefitting from the crisis and stay-at-home orders around the country, “the situation is evolving daily” and therefore it would not be prudent to make predictions for the full year, said CEO Sumit Singh.

Chewy is hiring between 6,000 and 10,000 employees at its fulfilment centres to handle a sudden increase in orders.



Coronavirus pandemic causes projected 17% sales drop for 2020

Market research firm Packaged Facts forecasts that total US retail sales of pet products and services will decline by 17% in 2020, compared with the 5% growth anticipated prior to the coronavirus pandemic. These projections translate into a drop from \$95 billion (€88 billion) sales in 2019 to \$78.5 billion (€73 billion) in 2020. Given the underlying strength of the pet industry, the firm projects a substantial (though partial) rebound in 2021.

This forecast factors in double-digit sales declines in 2020 for three out of the four pet industry sectors. Non-medical pet service sales are expected to suffer the sharpest drop in 2020, at 47%, due primarily to the link between pet boarding services and business/leisure travel. Also projected to drop in 2020 sales

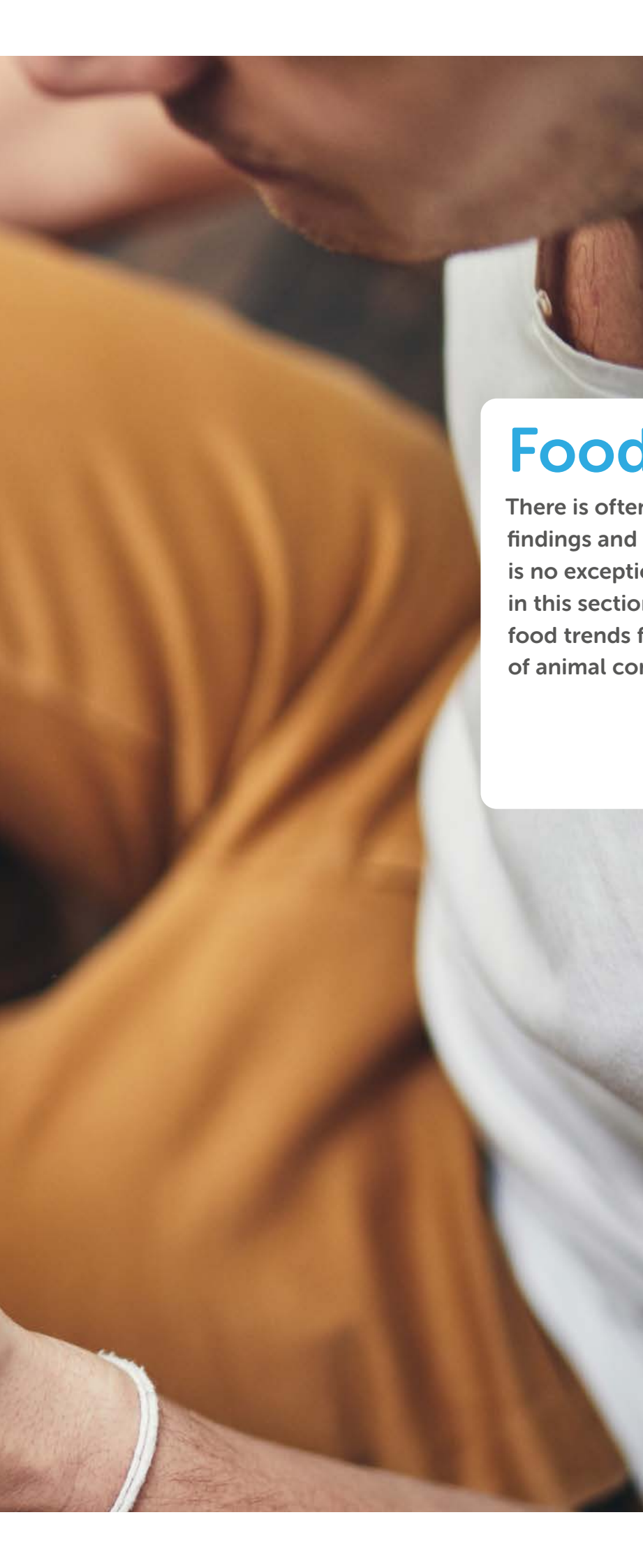
are the veterinary sector and non-food pet supplies, reflecting in part the discretionary nature of some of the services and products involved.

Overall market loss will be compensated to a degree by continued (though tapered) growth in essentially non-discretionary pet products, primarily pet food and cat litter. Pet food, the largest pet industry sector, is forecast to grow 4% in 2020, compared with a 6% growth forecast before the COVID-19 pandemic impact. Pet food sales will reflect, as in the 2008 recession, some trading down to value and store brands.

Further information: packagedfacts.com





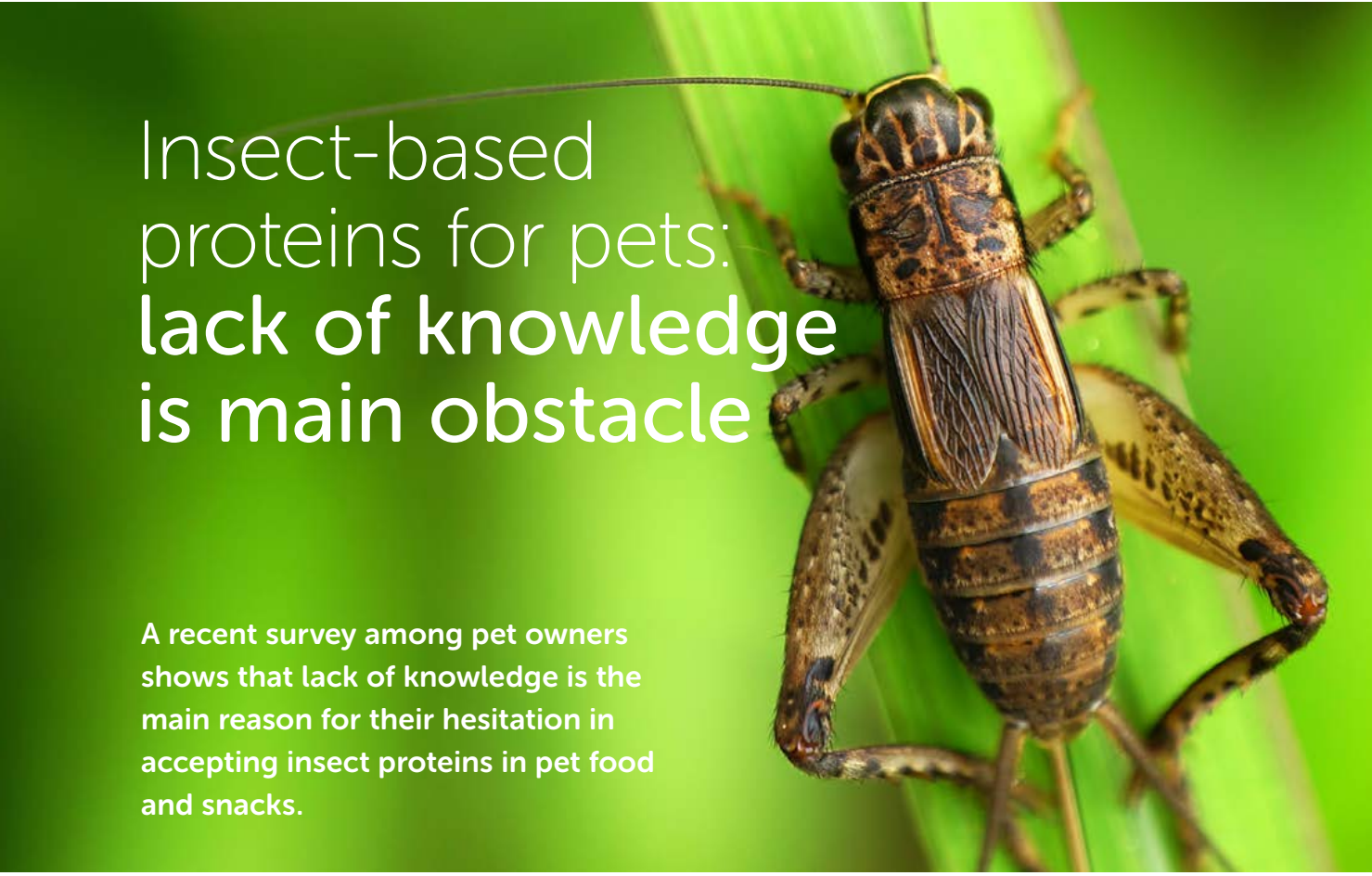


Food

There is often a gap between the scientific findings and consumer perception, and pet food is no exception. We explore some of those gaps in this section. Furthermore, we highlight several food trends for cats, dogs and even the smallest of animal companions.

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Insect-based proteins for pets: lack of knowledge is main obstacle



A recent survey among pet owners shows that lack of knowledge is the main reason for their hesitation in accepting insect proteins in pet food and snacks.

Conscious shopping

Between 40 and 50% of the pet owners surveyed say that they read the ingredients list when purchasing pet food in an attempt to stay informed about what they give to their pets. They are concerned about everything their pets consume.

More than 60% of the pet parents indicate that, when it comes to their pet's food, ingredients are significantly more important than brand and prices. This means that they are most focused on ensuring that the composition of the food is right for their pets. The topic of sustainability is at the bottom of their list of priorities.

Consumer misconceptions

As far as the pet owners surveyed are concerned, insects are not particularly rich in proteins compared to other, more conventional protein sources. This is in stark contrast to the results of the latest scientific research, which concludes that insects are the most protein-rich of all protein sources and thus are most efficient from the perspective of protein harvesting.

Studies also show that insects have the highest conversion rate from feed to proteins and are thus

more sustainable than proteins from meat, eggs or fish. However, the results of the survey demonstrate that pet parents are not entirely convinced that insect-based animal feed can play a role in protecting the environment.

Health risks

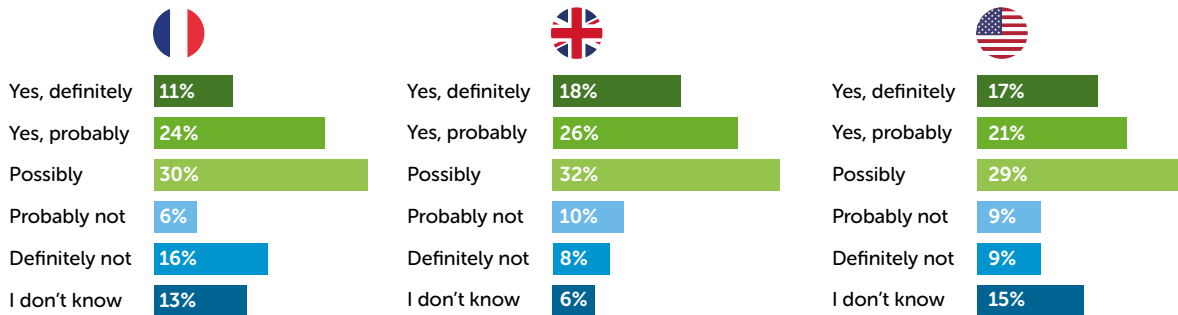
The survey also shows that more than half of the pet owners believe that insect-based ingredients could pose a health risk to their pet in terms of allergens, bacteria and a lack of hygiene. This once again goes against the latest research, which claims that proteins professionally derived from insects are sterilely produced and thus pose a negligible health risk. Perhaps unsurprisingly based on these findings, an average of 73% of the pet parents surveyed feel that they do not know enough about insect-based foods.

Humanisation

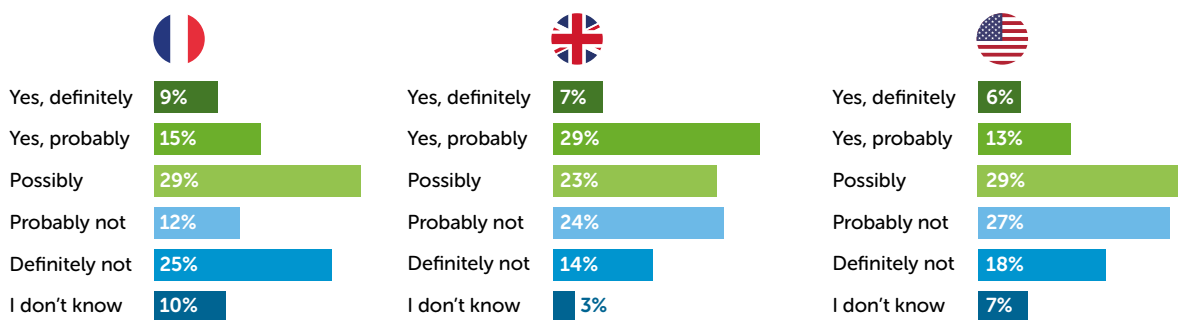
In response to the question of whether the respondents would be willing to eat an insect-based diet themselves, the majority of them indicate that it is less than likely. This is in line with the contemporary trend of humanisation; they will not give their pets what they are not prepared to eat themselves.

Food

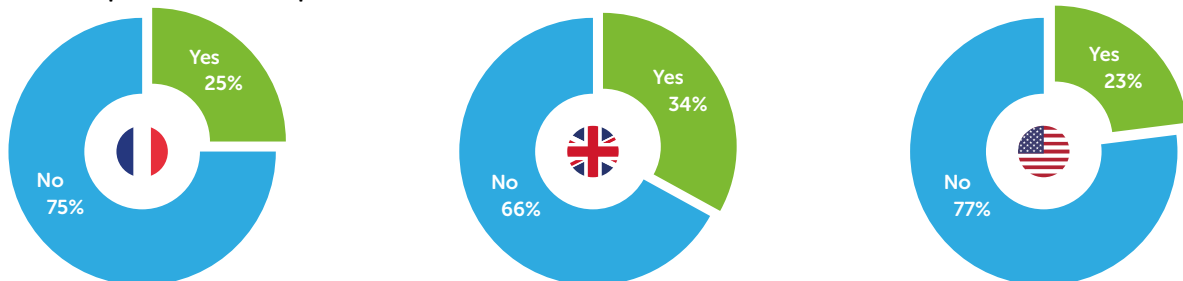
Do you think that the insect-based animal feed can be a good alternative to aid in environmental protection?



Would you be willing to feed an insect-based diet to your pet?



Finally, do you feel you know enough about insect-based foods to feel comfortable in giving your pet this alternate protein source as part of their diet?



Need for education

Taking all the results as a whole, we can conclude that there seems to be a hiatus between the scientifically available knowledge about insects in food and the knowledge that pet parents possess.

Consumers are not fully aware of all the possible advantages that insect proteins could offer, both to the industry and to consumers and their pets. Therefore, before insect proteins can fulfil their true potential and achieve the success they deserve, there is still considerable work to be done in educating consumers.

Facts and figures

The survey contained 15 questions and was conducted among 683 respondents throughout France, the UK and the US. The survey was targeted at cat and dog owners over a period of eight days. ♦



Acknowledgements

Special thanks go to Yumypets.



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Insects, algae and krill as alternative protein sources in snacks and treats

Pet treat companies are looking into new and exciting protein sources and ingredients. But will customers be provided with sustainable proteins in a way that respects planetary boundaries?

Insect proteins are the future

As global competition for proteins in human food, pet food and livestock feed stimulates the development of alternative and sustainable protein sources, treats containing various insect species are increasingly hitting the market. These are usually based on the whole larvae of the black-soldier fly, crickets or the yellow mealworm. Each species has a distinct composition, but the protein quality (amino acid composition) and digestibility are generally adequate. In fact, insects carry a novel protein which seemingly minimises the risk of triggering food allergies. As a result, the major consumers are currently the owners of sensitive pets.

Insect-based meat substitutes are potentially more sustainable than animal meat, but require more advanced cultivation and technology. Insects have a smaller ecological footprint compared to beef, pork or chicken, but bigger than slaughter by-products, protein meals – which already have a small footprint – or crop production.

Microalgae

Whole-cell microalgae can be a feasible alternative to raw materials derived from ocean fish. One of the most popular microalgae in human and pet food is *Arthrospira platensis* (spirulina). This unique ingredient has been proven to offer the pet industry a sustainable,

natural source of a highly digestible protein. Dried spirulina is made up of approximately 60% protein. Its protein contains all essential amino acids, although with reduced amounts of sulphur-containing amino acids when compared to the nutrition of farm animals. It is, however, superior to a typical plant protein, such as that from legumes.

Marine superfood: krill

Another marine superfood is krill, which is a tiny shrimp-like crustacean called *Euphausia superba*. Krill oil or krill meal is an increasingly common functional ingredient in snacks and dental chews.

Antarctic krill meal is attracting increasing interest as a source of high-quality protein. Compared to other animal proteins, the advantage is that it is low in fat and a rich source of omega-3 fatty acids. Antioxidant levels in krill are higher than in fish, suggesting benefits against oxidative damage. These sea creatures are caught in the wild. Krill eat algae as their food source, so are free of pollutants and heavy metals.

Their great abundance in waters makes krill one of the largest sources of protein on earth, sought after by fish, penguins and whales as well as humans. However, the global fish farming industry is increasingly relying on krill as food, so much so that they are in danger of extinction. Therefore, fisheries and manufacturers should participate in The Marine Stewardship Council – a certification programme that guarantees seafood is harvested using sustainable methods and is traceable throughout the supply chain. ♦



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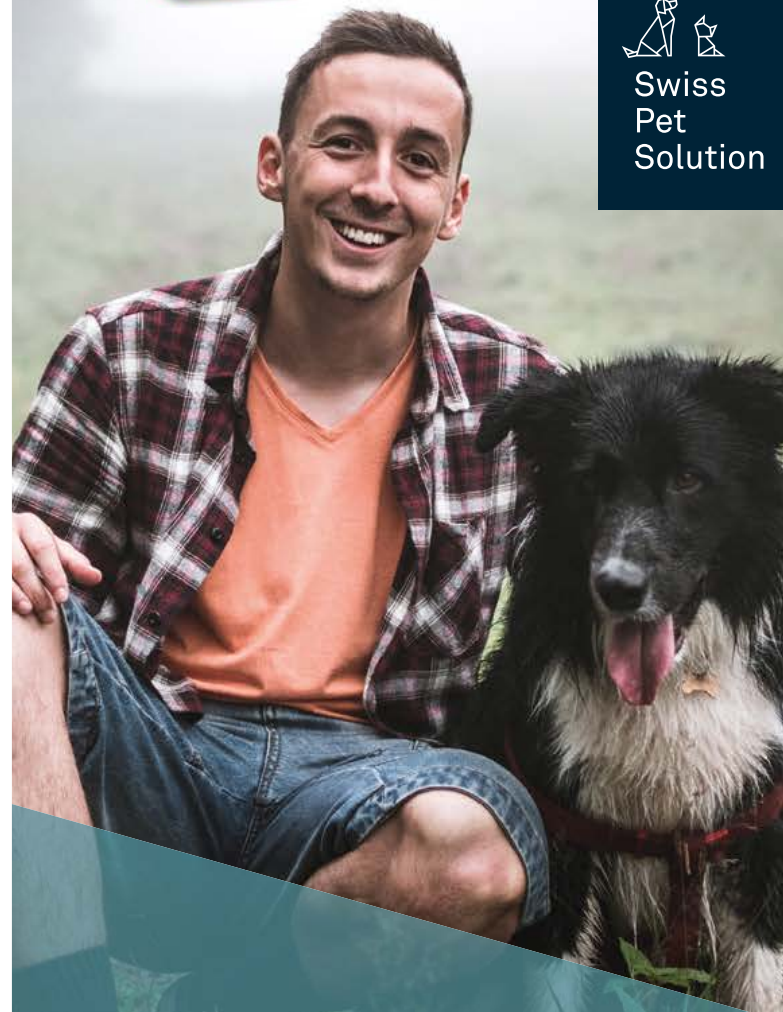
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Pet food trends and paradoxes in the US

E-commerce was again the fastest growth channel for pet product sales during 2019, growing 26% to reach \$12.3 billion (€11.5 billion), with pet food accounting for \$8.2 billion (€7.6 billion). However, there are some paradoxes.

Two paradoxes

Within the pet product industry, there is a paradox in relation to pet food formulation/nutrition and pet health. The pet industry offers 'mass premiumisation' based on special ingredients and effects on the pet. A regular pet retailer has no shelf space to offer such premiumisation products to the end consumer. E-commerce has now helped to demolish the walls between the pet specialty channel and the mass market. This has unleashed a stream of pet specialty products into mass-market channels, pumping up pet food sales at Walmart and other supermarket chains. The paradox is that the mass market now has the edge over the pet specialty channel in sales growth.

A second paradox is that despite the tidal wave of specialty pet foods, old-school kibble continues as king of the pet food segment. Consumer survey data from Simmons Market Research shows that fully 96% of dog owners in the US bought dry dog food in 2019, up slightly from 94% in 2009. Use of dry cat food is, similarly, all but universal.

Most important claim: 'Made in the USA'

Despite the market sturdiness of kibble, the market continues to tilt towards specialty formulations and differentiating claims. Packaged Facts' February-March 2020 Survey of Pet Owners shows that, among dog and cat owners, only 42% identified themselves as

Dry versus wet pet food purchasing patterns: dog versus cat owners, 2009-2019

(in percent of US dog/cat-owning households).

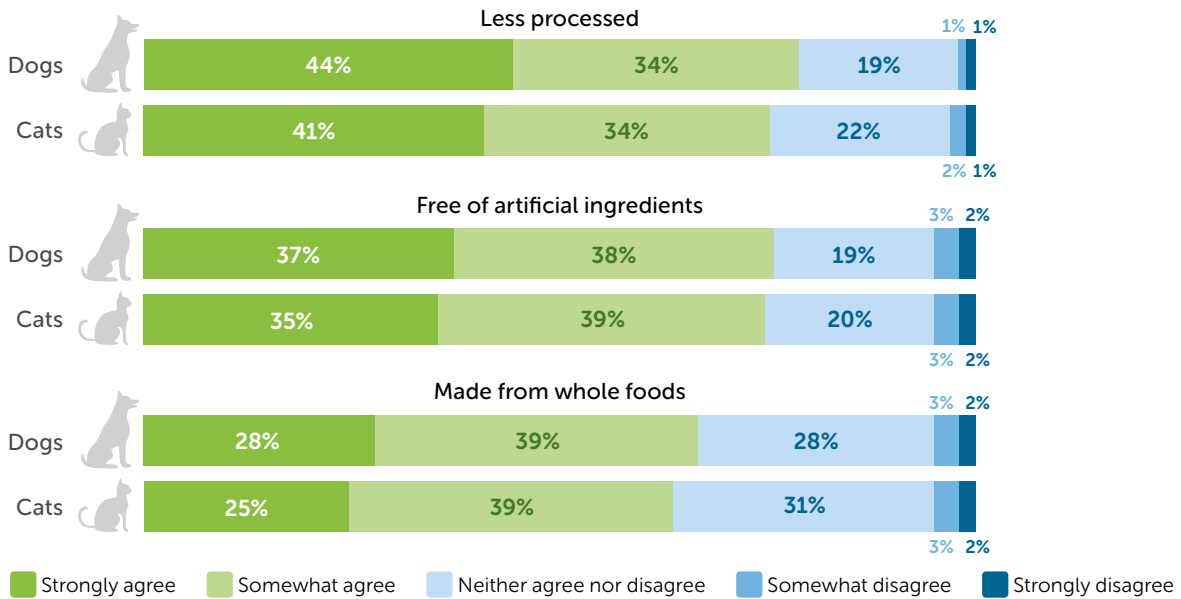
	2009	2011	2013	2015	2017	2019
Dog Food						
Dry (Kibble)	94%	96%	94%	95%	95%	96%
Wet/Canned	30%	35%	39%	38%	38%	37%
Cat Food						
Dry (Kibble)	96%	97%	96%	94%	95%	96%
Wet/Canned	45%	50%	53%	55%	55%	52%

Source: Autumn 2009 – Autumn 2019, MRI-Simmons Profile Reports Adult Study 12-month. Base: household. Copyright: 2020. This material is used with permission. All rights reserved.



Food

Level of agreement with statement, 'pet foods that are ... are healthier for my pets'



Source: *Packaged Facts, US pet market outlook 2020-2021; Packaged Facts' February-March 2020 survey*

using regular/adult formula pet foods. Among dog or cat owners who had changed pet foods in the last 12 months, only 33% of dog owners and 26% of cat owners switched to what they classified as a regular/adult formulation.

The pet food claim most important to US consumers is: 'Made in the USA'. To put this in perspective, pet foods with a 'Made in the USA' claim draw a higher percentage of dog food customers than regular/adult formulations do (49% versus 42%).

DCM

Despite the popularity of 'grain-free', this has been more of a competitive trump card for natural pet food marketers than an inherent priority of pet food customers. Given the current concerns about the disease dilated cardiomyopathy (DCM), pet specialty marketers and retailers are emphasising science formula brands such as Hill's and Royal Canin. Adding to the current market paradoxes is therefore that science formulas are now posting greater growth due to the natural pet food segment's entanglement with grain-free.

Consumer priorities

Along with product safety, what then are the true consumer priorities? Packaged Facts' survey data

shows that three-quarters of dog or cat owners strongly or at least somewhat agree that less processed pet foods are healthier for their pets. Likewise, three-quarters agree that pet foods free of artificial ingredients are healthier, and two-thirds agree that pet foods made from whole foods are healthier.

Mother Nature remains central to what many consumers believe pet food should optimally be. Wet pet foods, as a tried-and-true method of preserving natural nutrition and presenting a more human, meal-like product, are likely to gain in importance in pet food innovation.

The current coronavirus crisis has led to a further surge in pet product e-commerce and to a new advantage to mass marketers such as Walmart and supermarkets that are set up for home delivery or curbside pickup of groceries, including pet food. ♦



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A Swiss success story

As the name suggests, Swiss Pet Solution represents Swiss quality. The company is new on the international market, but has been producing super premium quality pet food for more than 30 years. It is the only Swiss producer to offer a complete high-end range of pet food for dogs, cats, rodents, rabbits and birds.

A strong position

Based in the Swiss municipality of Kaiseraugst, directly on the Rhine, the company made a name for itself with its Iso-dog and Iso-cat brands, which have mainly been distributed in Switzerland until now. The growing company was keen to expand even further and tap into new markets across the globe. This led to the decision to start operating under the current name of Swiss Pet Solution in order to position itself more strongly on the market from this year onwards. It aims to win over further distribution partners with products that bring the Swiss values of reliability, flexibility and – above all – quality to the fore.

Local sourcing

The company has maintained close relationships with local farmers and suppliers for many years so that it can process the highest-quality raw materials that are free from GMOs and wheat gluten. “Our processing is carried out using a nutrient-preserving procedure known as the optimal cooking process, which makes the food particularly flavoursome and popular with animals,” says Dr Stephan Leoni, Business Unit Manager. “We want to use the expertise that our company has built up in recent years from specialists, veterinarians and sales professionals to offer our customers the solutions they need,” he adds. The aim is to offer customers a

full-service package and support them with marketing their existing brands or with creating their own brands, from feed composition through to marketing.

Ready for the future

Swiss Pet Solution is CO₂/kWh certified, meaning that its ecological footprint is reduced every year. Over 70% of the company’s electricity consumption comes from renewable energy sources, and it actively supports customers and partners who are increasing their use of reusable packaging. ♦

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Dolina Noteci Superfood is superfood for dogs!

A series of cereal-free food, without preservatives, full of vitamins and minerals, which have beneficial influence on pets' health and condition. The recipes are based on unique types of meat: e.g. roe deer, deer, kangaroo, duck, beef and veal, which make up 80% of the composition.



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Favourite snacks for your favourite pets!

Since right from the start, in 2006, Dokas has been living its passion for dogs and cats and doing everything to develop premium snacks that animals and their owners love.

A diverse brand

The company's world is colourful... just as colourful as life is with dogs and cats. For customers, this means a growing range of diverse products and the perfect snack for all situations, whether as a reward, for play and training, or as an intensive chewing experience. The snack specialist even knows how to incorporate current trends into the development of its snacks.

Quality for life

At Dokas, the maxim is: 'Only high-quality products improve the quality of the animal's life and contribute to well-being.' In other words, quality is paramount in the realisation of the products. The company takes part in a voluntary testing programme to ensure consistent quality, and this is highlighted on the product

packaging by the SGS Institut Fresenius quality seal. This independent laboratory, known for its high level of expertise in food testing, checks the nutritional values of the Dokas snacks at fixed intervals. In addition, all of the company's production facilities undergo unannounced supplier audits twice a year.

Respect for nature

Dokas stands for the joy in the relationship between humans and animals and wants its products to contribute to a healthy and vital life for pets. This also includes respectful cooperation with other living beings and with the environment in which we live. The company considers this as one of their main values. The snack specialist was the first pet food company to receive the 'Good Rabbit Commendation'

award for animal welfare and sustainable production processes. Furthermore, the fish products it uses come from sustainable fishing sources and are marked with the MSC quality label.

Strive to improve

True to the motto 'The beginning is half of the whole', Dokas is proud of striving to become a little better every day. The company is still far from achieving its ultimate goal, but is consistently working towards self-improvement. Customers and retailers also benefit from the added value. It is not surprising that the products are now enjoying international popularity. ♦

♦ Dokas Handelsgesellschaft GmbH
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Home-style cooking for dogs

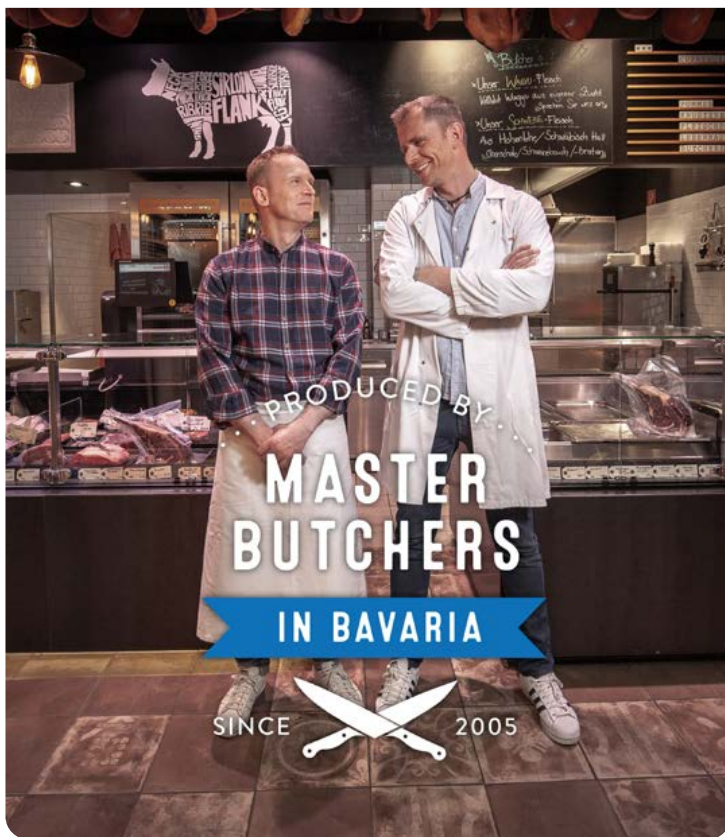
The first dog food in 100% human-grade quality *of all ingredients*



The first dog food on the market in 100 % human-grade quality of all raw materials, manufactured in a Munich butchery, a genuine food production company. With this concept, Terra Canis set completely new quality standards in the pet food industry 15 years ago and remains loyal to these high standards to this day. All Terra Canis menus are still made by master butchers but in an in-house production facility near Munich using the best ingredients in exclusive 100% human-grade quality. And you can smell this as soon as you open a tin of Terra Canis – the menus smell very appetizing and tasty, just like a home-cooked meal.

Check out the unique and uncompromising Terra Canis quality for yourself! We would be happy to send you product samples and other information material. If you are interested, please send an email to: international@terracanis.eu

www.terracanis.eu



Terra Canis GERMANY

The first dog food made from 100% human-grade ingredients

With its concept of 'Dog nutrition based on 100% human-grade quality of all ingredients', Terra Canis has been setting new standards in the pet food industry for the past 15 years.

Traditional butcher's shop

Thanks to receiving a special permit from the government of Upper Bavaria 15 years ago, Terra Canis was able to start producing pet food for the first time in a genuine human-grade quality company: the traditional Munich butcher's shop Schäbitz. The company has continuously developed its concept of 'Dog nutrition based on 100% human-grade quality of all ingredients' ever since.

Uncompromising quality

Right from the very start, the company used in its formulations only ingredients which, thanks to their freshness and quality, were officially approved for human food products at the time of processing. In other words, the ingredients were of real human-grade quality. This exceptional quality is immediately obvious upon opening a tin of the brand. The company's pet food products smell like meals that you would prepare fresh in your own kitchen. This uncompromising quality has

differentiated the brand from all other products on the market from day one.

Maximum quality control

Due to the constantly increasing demand for the brand across Europe, the traditional butcher's shop in the heart of Munich has reached its capacity limits. As quality is of the highest priority for Terra Canis, the products will now be produced in the company's new factory just outside Munich. This new production facility was built and is operated in line with human-grade quality standards.

Manufacturing the products within 'the own four walls' will enable continued maximum control over the quality of ingredients and all production processes. In addition, three master butchers from Schäbitz in Munich and their entire team have been transferred to the new factory, bringing with them decades of experience and expertise in the butcher's trade.

A versatile range

All the ingredients used, the production site and the hygiene concept are still subject to 100% human-grade standards. The company's customers can therefore continue to rely on the human-grade quality of the products. The Terra Canis product range encompasses a very large selection of pet food products: from grain-free to hypoallergenic, from puppy to senior and from classic to mini.

The comprehensive wet food range is complemented by numerous snacks. The company also offers supplement products which are all based on naturopathic approaches such as phytotherapy, Bach flowers and Ayurveda teaching. All products have been developed in collaboration with a team of three veterinarians. ♦

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Food



Snacks for small pets

Nibbling comes naturally to small animals, both in the wild and as pets. The pet industry provides a wide choice of snacks and treats tailored to the needs of all smaller species.

Natural behaviour

In the wild, small animals spend their time looking for food and they nibble on whatever they find. In captivity, rabbits and small rodents enjoy doing the same. Snacking on small, varied treats stimulates their appetite and brightens their daily lives. Thanks to the pet industry, these snacks exist in many shapes and flavours, to please all species and match their needs.



Grain-free formulas for herbivores

Natural snacks are the best for rabbits and herbivorous rodents like guinea pigs and chinchillas. These vegetarians cannot digest starch or other additives, and should eat only vegetal food. Dandelion roots or leaves are a must, and often even a favourite. For instance, Bunny Nature offers this with its Botanical line.

Herb mixes are also highly appreciated. With its Grainless Snack Plus Combi Pack, the brand JR Farm offers a good combination of 100% vegetal and grain-free snacks: chamomile, dandelion, peppermint, strawflower, sage and caraway. The French brand Hamiform has an impressive range of natural snacks, divided into three lines: Crunchy, Gourmet Treats and Nature Breaks. From rosebuds or plantain to blackcurrant or banana, there are lots of very tasty flavours and shapes to choose from.

Insect formulas for omnivores

When it comes to omnivorous rodents such as hamsters, mice and rats, proteins are extremely important. With its Little One line, the Mealberry brand produces boxes of mealworms and mixed insects. If consumers do not like the sight of dried mealworms, they are also available as little heart-shaped biscuits from Bunny Nature's My Little Sweetheart product range. For selective rodents, biscuits or baked snacks are often a good way to give treats, such as JR Farm's Oat Bites: little baked oat and malt pillows that are protein-rich, low in fat and free from added sugar.

Healthy sweets for the smallest pets

Added sugar is actually something owners of small pets have to be especially aware of, as many smaller species might suffer from diabetes or obesity when they are not fed correctly. The best way to offer a sugary treat is in the form of dried fruits or berries.

Many brands offer dried banana, apples, grapes, papaya, cranberries or coconut in their product lines. For instance, Versele Laga offers packs of its product range Nature Snacks Berries/Fruities. Thanks to the premium brand Oxbow Animal Health, pampered hamsters or guinea pigs can nibble baked treats or dried ingredients from the Simple Rewards line: Bell Pepper, Carrot and Dill, Strawberry and Veggie Treats.

There are now many options for healthy treats with added value to keep even the smallest animal companions happy. ♦

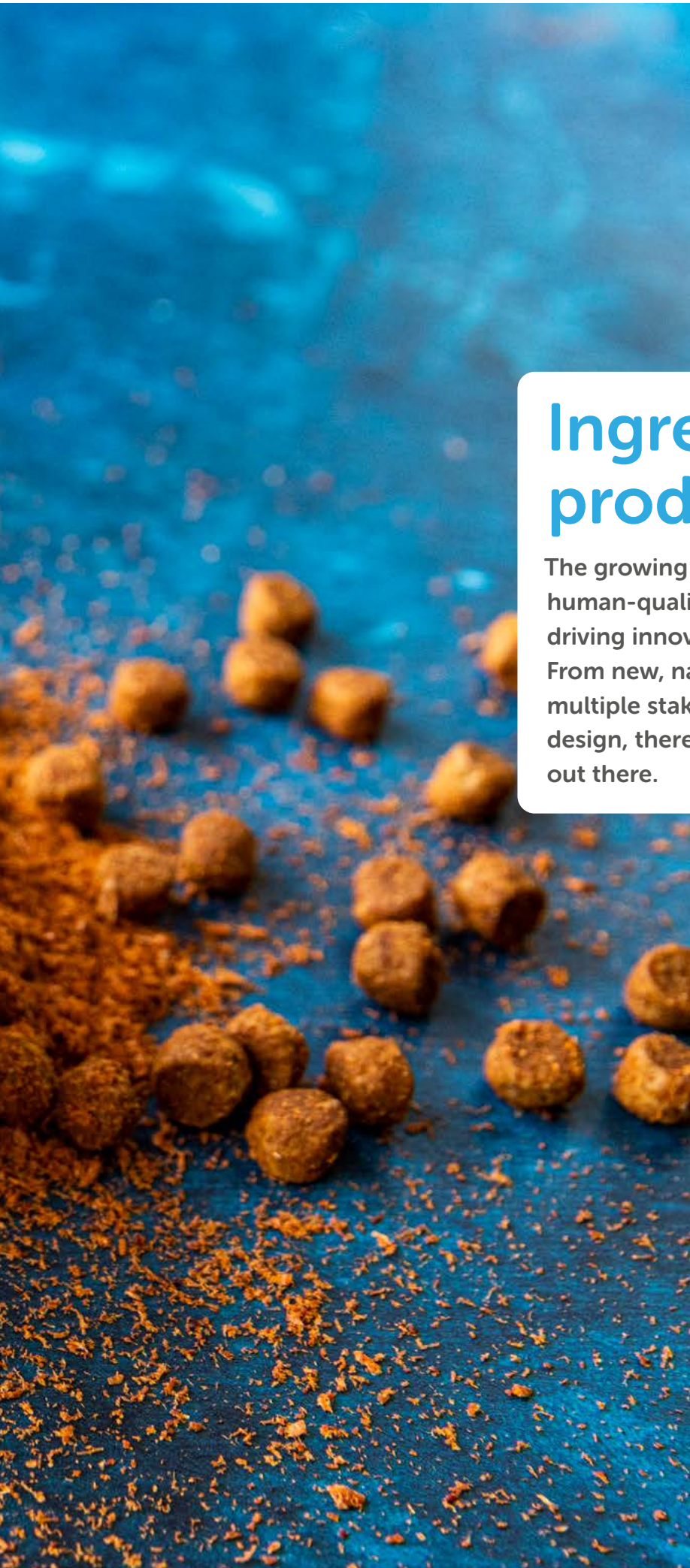


Marie-Sophie Germain

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 AKER BIOMARINE





Ingredients and production

The growing demand for sustainable and nutritious, human-quality ingredients, foods and treats, is driving innovation in all parts of the value chain. From new, natural ingredients, to collaboration with multiple stakeholders and innovative packaging design, there are plenty of exciting developments out there.

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Improving the sustainability of ingredients

The growing demand for nutritionally optimal and palatable raw pet food ingredients is challenging to meet ethically, environmentally and economically. There are alternative, sustainable options but they require optimal cooperation along the value chain.

Search for sustainable alternatives

A sustainable pet food ingredient limits global warming, protects the ecosystem and respects natural resources. Sustainable raw ingredients must come from defined sources. All this may raise the overall costs of pet food products because all pet food ingredients are not born equal, when it comes to sustainability.



Suitable and optimal manufacturing techniques in the upstream and the downstream processes of commercially available pet food ingredients can yield sustainable alternatives.

Sustainability of rendering

Rendered products could be considered as sustainable, when produced in the upstream processes in a responsible way, since they reduce waste from slaughterhouses. In downstream processes, rendered products are valuable pet food ingredients, and may become even more valuable when hydrolysed.

When compared with rendered vegetal products, feather, fat and blood products are relatively low carbon footprint ingredients used in the pet food industry. They can compete with high energy density and other highly digestible nutrients, essential amino acids and phosphorus. Therefore, rendered products are suitable for high density pet food formulations.

What is needed, is for pet food producers to work together with the rendering industry to focus on responsible production of the by-products and the creation of added value by mixing enzymatically treated animal and cereal by-products, such as wheat

What is needed, is for pet food producers to work together with the rendering industry to focus on responsible production...

bran for phosphorus and proteins. The superior ingredients that result may boost the entire value chain and so compensate the negative effects of producing the by-products.

Perks of a prebiotics diet

Another consideration is ensuring the optimal utilisation of nutrients from the sustainable ingredients. During weaning of pets, the microbiome is key to maintaining good health. When solid pet food is introduced, the gastrointestinal tract may fail due to the invasion of pathogens. This, in turn, can lead to decreased digestion efficiency and contribute to decline in the well-being of the pet animals.

Intake of prebiotics modulates the intestinal microbiota and changes composition of the microbiota. Prebiotics are indigestible to pets. However, they are available as an energy source to the bacteria inhabiting the lower gastrointestinal tract. So keeping healthy gut bacteria contributes to sustainability of ingredients through ensuring optimal nutritional uptake.

Creating value

Sustainable, alternative ingredients can be obtained through improved operational steps, multi-stakeholder harmonised methodologies, and shared high-quality data with the final user. Once the final user sees the value creation, sustainability will become a priority. ♦



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An aerial photograph of a vast agricultural field, likely a cornfield, showing distinct rows of crops. A combine harvester is visible on the right side, moving through the field and leaving a trail of harvested grain. A smaller blue truck is positioned in the lower-middle part of the field. The overall scene is bathed in warm, golden light, suggesting late afternoon or early morning.

Managing your supply chain for business continuity

The COVID-19 pandemic demonstrates vividly the vulnerability of our value chains to risks, whether climate and sustainability-related, reputational or quality, like product recalls. How do we rethink them to increase resilience and ensure business continuity?

Vulnerable

Many value chains are based on outsourcing and just-in-time logistics. Under the current crisis – with borders closed and emerging resource scarcity due to a reduced labour force, stockpiling by organisations and even countries – we see that our value chains are struggling to produce and transport the products consumers and pets need.

Exposing risks

But even before this COVID-19 crisis, resource scarcity and price fluctuations of vital resources have been exposing the risks to our value chains and how we source our ingredients.

At the same time, consumer demands increasingly focus on sustainable products and sustainable origin.



Sustainable sourcing

As pet ownership grows, the need for ingredients will further increase. According to [grandviewresearch.com](https://www.grandviewresearch.com), the pet food ingredients market is projected to grow 46% to \$54 billion (€48 billion) by 2025, from \$37 billion (€33 billion) in 2019. For ingredients from the agro-sector, this will ultimately lead to a situation in which the available farmland for production of pet food ingredients increasingly competes with production of food and bio-based materials. This, in turn, will lead to rising market prices. The effects of climate change will also impact the availability of ingredients, and market prices will fluctuate more than in the past.

High standard

So, to ensure that companies can continue producing their pet food, it is necessary to understand where ingredients are sourced from and what the risks are related to availability and price.

This is also important in view of the 'humanisation' of pet food, which demands that brands inform consumers better about the quality, healthiness and sustainability of the ingredients. To do that, companies need to look beyond traders and bulk sales, to understand where products are sourced and whether production meets the high standards of consumers.

Preventing recalls

The same applies to preventing recalls. We all know that recalls of pet products can harm a brand or a company's image, quite apart from the damage inflicted on animals and their owners. Some of these recalls might have been prevented if the relations between producer, manufacturer, pre-packers, traders and other value chain actors were more transparent, in terms of production, processing and storage of products. This demands a more pre-competitive way of looking at the value chain, working on shared value, for the actors and the consumer.

Four best practices

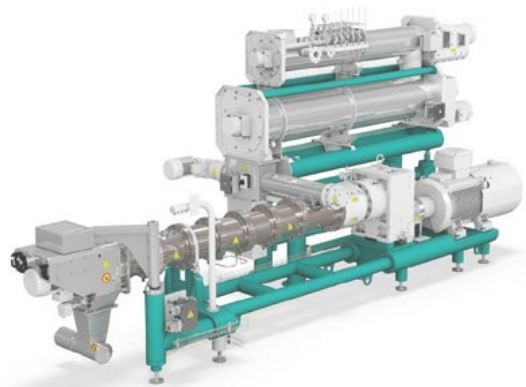
A common theme emerging from all of this is that a transparent value chain contributes to greater consumer trust and resource security, ultimately leading to business continuity. To achieve this, we can learn from the human food sector and adopt four best practices:

1. Work with the same type of certifications and apply them on package. For example, UTZ Certified – now Rainforest Alliance – investigated entire value chains and trained farmers to become more sustainable while demanding a fair wage from brands. [▶ SEE NEXT PAGE](#)

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Ingredients and production

Brands use these certifications on the one hand to transparently and credibly communicate about their sustainable sourcing, and on the other hand these certification bodies help them with a transparent value chain and thus their supply security.

2. Develop preferred supply relations, not only through financial transactions, but by intensified relations with mutual information exchange. For instance, remuneration in the form of training in sustainable production.
3. Use digital tools that help us to trace products back to their origin, such as RFID tags or near field communication (NFC). All the best practices that we apply automatically for human food, we can also use to develop transparent and interlinked pet food ingredient value chains.
4. Define and pursue sustainable sourcing broadly: that is, social, financial and environmental sustainability. This relates to the circumstances in which farmers operate and their methods, but also the environmental issues that are involved in processing of ingredients, fair wages for workers and a healthy working environment.

Back to now

The current pandemic proves even more that we need to rethink how we organise our supply chains. Reorganising our value chains to develop shared value, based on a common understanding of what sustainable sourcing of ingredients entails, will help to develop the sustainable ingredients of the future. This requires a transparent and flexible value chain that will strengthen your brand towards an increasingly more conscious consumer. It is a win-win-win in many ways.

To invest in a more transparent and interlinked value chain, is to invest in business continuity. ♦



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Do you know what is in your pet's food?

Not all pet food ingredients are created equal. Consumers today expect sustainably-sourced, nutrient-rich ingredients that positively enhance the health and well-being of pets.

Changing times

We are living in an age of awareness. Consumers have more power than ever before when it comes to their purchasing decisions. Armed with a quick Google search, shoppers can easily research an ingredient to find out whether it is sustainable and the health benefits it offers their pets.

Adding nutritional value

Just as humans take nutritional supplements for things their body lacks, the same is necessary for pets. Pets are unable to produce sufficient omega-3s naturally in their bodies, for example. Omega-3 fatty acids are important nutritional supplements to any diet, benefitting everything from brain development to heart health.

Marine-sourced omega-3

Studies show that marine-sourced omega-3s remain the most effective source for pets, as pets are unable to convert enough of the plant-sourced version in their bodies. The omega-3s that seem to be most efficient are those bound to phospholipids, such as found in krill.

Krill are crustaceans, low on the food chain. In the Southern Ocean, you find Antarctic Krill, a species with one of the largest total biomasses. These tiny crustaceans inhabit the unpolluted waters of Antarctica, making them free of environmental toxins and contaminants.

Sustainable sourcing of ingredients

There is a dedicated effort among krill harvesters to carry out their work as sustainably as possible. Currently, the krill fishery is the only 'A' rated reduction fishery in the world. For example, Aker BioMarine was the first krill harvesting company to get MSC certification due to the high standard of its fishing operations and sustainable practices.

Four nutrients, one ingredient

In order for pet food manufacturers to stand out in a congested market, they must ensure that ingredients are sustainable and nutritious, while ideally being palatable and digestible. QRILL Pet offers some major nutrients in one: phospholipid omega-3s, choline, marine proteins and astaxanthin, while also ticking all boxes on sustainability.

Krill is still a relative newcomer to the pet food market. But as consumer expectations grow, krill may become an increasingly essential ingredient in a pet's diet. A little krill can go a long way in contributing to the long and healthy life of our furry friends. ♦



Aysen Korucu
Senior Marketing Manager QRILL Pet
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Application

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Coveris, a leading European manufacturer of flexible packaging, has developed an eco-friendly packaging solution answering the market demand for recyclable flexible packaging.

MonoFlexE is a mono-material alternative for dry pet food packaging, including snacks and treats. Designed using 100% polyethylene, it works for both form-fill-seal and pre-made bags.

MonoFlexE stands out on the shelf with its high gloss finish and improved printing options. Moreover, the increased stiffness of the material, and the equivalent machinability as standard PET/PE, makes introducing it to existing production lines a straightforward procedure. Additionally, this packaging maintains the best features of standard Coveris films, including enhanced convenience for opening and reclosing, as well as an attractive, premium look at point-of-sale.

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Top-quality pet products from Germany since 1984

The Canina portfolio consists of more than 170 products for a long and healthy animal life, covering supplements, care and hygiene, and anti-vermin control for all kinds of pets.

Natural supplements and anti-vermin control

All products are made with natural raw materials which are suitable for human consumption. The company's aim is to be the 'problem solver' at all stages of an animal's life, which is why all pet food products and supplements are developed to the veterinarians' highest nutritional standards.

Canina's natural anti-vermin control products provide effective protection against vermin without harming the pets themselves. Their wide range of supplements solves all kinds of problems during all stages of the pets' life. They also supply many products to support Biologically Approved Raw Food (BARF) feeding principles.

The company's focus on innovation means there is always a steady stream of new products, developed together with

veterinarians. For instance, hemp-powder and hemp-sticks are among the latest products. The 'multi-talent' hemp, one of the oldest medicinal and cultivated plants, supports dogs' metabolism, immune system, muscle building, nerve strength and vitality.

From Germany to the world

The company was founded in 1984 and is still a family-owned company today. All products are produced at a single-site location in Germany, covering production, warehousing and administration. This gives optimal flexibility to satisfy customer needs.

The full range of products is currently available at almost 3,000 pet shops, animal healing practices and dog grooming salons in Germany. Products are also stocked by local retailers in more than 45 countries worldwide, and growing. In addition, the company makes products for many well-known domestic and foreign companies under their own labels.

Corporate social responsibility

Canina has been a recognised training organisation in Germany since 2001, supporting the vocational education of young people in both administration and production-related activities. It has received an 'ÖKOPROFIT' ecological award for integrating environmental technology to reduce costs and, in 2018, was awarded a German business award as 'Best animal health supplier'.

In 2016 a solar plant was installed to further reduce the carbon footprint of production activities, so that now more than 50% of the company's total energy requirement is generated in an eco-friendly manner. ♦

♦ **Canina Pharma GmbH**
info@canina.de
canina.de



How sustainable is your supply chain?

Sustainability is becoming a critical part of today's pet food business and encompasses a whole lot more than just sourcing natural, organic and sustainable ingredients.

Growing eco-consciousness

Sustainability in the pet industry is being driven by consumers' desire to reduce their impact on the environment. Millennial consumers are especially attuned to the environmental effects of their practices and are willing to pay more for sustainable pet products.

This is no niche segment. As the trend of pet adoption continues to move beyond affluent consumers in developed regions to middle class population in developing economies, consumer spending on pet products is defying gravity. And conscientious

consumers today are increasingly examining what goes into pet food and packaging.

Beyond natural and organic

It is clear that sustainability is becoming a critical aspect of today's business. It is visible as a growing interest in claims such as natural, organic and clean label, but not only. Animal welfare is also a key consideration.

In fact, an ongoing research project by the Pet Sustainability Coalition, in partnership with Iowa State University, looks into four areas around pet food and



sustainability: environment, nutrition, social, and animal welfare.

Sustainable humanisation?

As the pet humanisation trend grows stronger, owners increasingly expect pet food and its ingredients to meet the highest possible quality standards while being sustainable. In order to set their products apart from the competition, pet food companies are responding, and turning to co-products of the human food industry to address both humanisation and sustainability aspects.

But, while 'human-grade' ingredients are taking the pet food industry by storm, the jury is still out on the pet health benefits of these ingredients and whether they provide the appropriate level of nutrients. And

while using co-products of the human food industry is eco-efficient, the sustainability of these protein sources as a whole is also coming under close scrutiny, as they often come from beef and poultry, followed by pork, fish, and lamb – which are among the largest contributors to greenhouse gas emissions.

Meanwhile the social aspect of sustainability in pet food largely centres on animal welfare, namely that the animals providing the protein were ethically raised and grass-fed.

Alternative protein sources

Addressing concerns about the sustainability of animal protein sources, alternative protein sources such as insects or cellular-based, cultured products are attracting growing interest. But to what extent do they address the need for nutritional sustainability? Today, pet food ingredients need to be not only culturally acceptable to the pet owners, but also nutritious and palatable to the pets.

Finding the sweet spot

Amidst technological revolution and economic transformations worldwide, a 'one-size-fits-all' strategy is not possible to achieve sustainability goals in the pet food industry. Leveraging new ingredients, identifying white spaces in terms of their application potential, and discussing opportunities within the industry are all important to be able to achieve greater sustainability in the future. ♦



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Tempting prospects in the pet treats market

Pet treats are big business. With sales growth that regularly outpaces the pet food market, this category is expected to continue increasing year-over-year. A high standard of palatability is key to success.

Impressive growth

According to Euromonitor, dog treat revenue grew 38% worldwide over the past five years, while cat treat revenue increased an impressive 69%. Over the same period, dog treats volume increased 18% in tonnes worldwide, while cat treats grew a remarkable 59% by tonnage. These numbers demonstrate there is a large opportunity in the treat market.

Purpose of treats

Pet parents view their cats and dogs as family members. Often they use treats to enhance the relationship with their pets. Many pet parents offer treats as an indulgence or snack, similar to the way they would indulge themselves. Dog owners often use treats to reward their pets' good behaviour during training. Treats also provide entertainment when used with treat-dispensing toys. Because cats are often more independent, feline treats tend to be used to enhance bonding moments.

Treats can also serve another purpose: improving pets' health. Functional treats designed to address specific health concerns such as joint support, oral health or hairball prevention are popular for both dogs and cats.

Treat palatability

Treats are held to a higher standard of palatability than other pet food, since pet parents expect their cat or

dog to readily accept a treat. Therefore, when testing treat palatability, acceptance is the most important criteria. Manufacturers typically look for an acceptance rate of 80% for cats and close to 100% for dogs.

Because treats are given and consumed in a different way than a meal, palatability trials are different. Monadic testing, where only one product is given to the dog or cat, is used to measure acceptance. The products are given by hand during a defined time duration to mimic an in-home setting. Behaviour measures can augment the acceptance data to help determine the pet's enjoyment of the treat. Two-bowl or preference trials, while not typical, may be used if a manufacturer is trying to determine which treat is preferred.

Treat palatants

Pet acceptance often relies on selecting the best palatant to work together with the treat ingredients, processing equipment and form. AFB offers a portfolio of products that successfully deliver palatability performance to customers, whether treats are dehydrated, freeze-dried, baked or extruded. ♦



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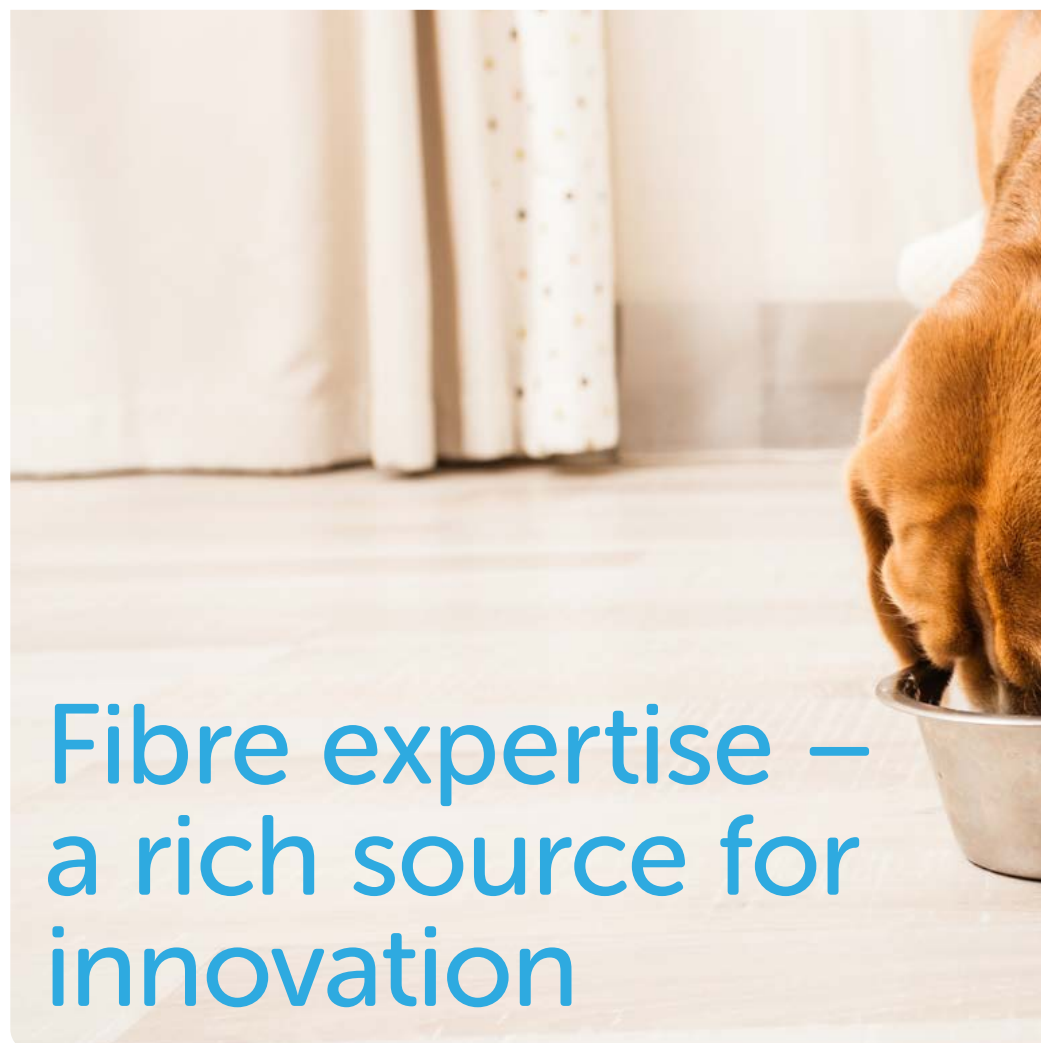
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1 Careful selection

Quality control Authentic products

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Fibre expertise – a rich source for innovation

Looking for unique, marketable product features and differentiating marketing messages in branded and private label products? Plant-based dietary fibres are not only a rich source of product innovation, they also respond to the consumer demand for vegetarian and sustainable alternatives.

Marketing statements

First of all, plant-based fibres allow pet manufacturers to make product claims such as less obesity, better metabolism, improved gut health, dental care and support of healthy diets for agile animals. This could all be used in marketing and product development to create competitive advantages.

Secondly, plant-based fibres are sustainable, meeting consumer demand for natural sourcing, sustainable life cycles and pet natural well-being.



Innovation by new techniques

Plant-derived dietary fibres can supply a wide variety of technical features, such as usability, health benefits and the optical appearance of the food. Applications are even possible in areas like niche and surface designs, moisture management and texturing. In parallel, the right fibre input could also lead to cost reduction or process optimisation.

The best fibre tools

To create these marketing claims and deploy these technical benefits, the pet food manufacturer needs a toolbox. Specifically, a toolbox with a wide portfolio of specified dietary fibres, manufactured from cereal, cellulose, fruit, vegetable or sea related plants, following different functionalities, specifications, properties and applications.

Setting the standard

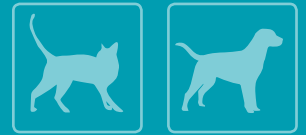
To support new ideas based on fibre solutions, JRS J. Rettenmaier & Söhne sets the standard in raw material know-how and applications, operating 14 specialised dietary fibre plants in Europe and the US.

The company has a new pilot plant and test centre for the pet food business, located at its headquarters in Rosenberg, Germany.

Experienced pet food manufacturing professionals and food technologists based at the site support recipe development, product or process optimisation, pilot production and series conversion. For more than 140 years, JRS has been refining the intelligent possibilities that nature offers. JRS is adapting to the circular economy in the best possible way, by choosing the raw materials carefully and reducing the CO₂ footprint more and more. For example with the new Biomass Power Plant that saves up to 13,000 tons CO₂ emissions in production. ♦



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Meelunie combines traditional values like reliability and social engagement with innovative practices and a forward-looking mindset.

A tradition in setting new standards

Meelunie was established in 1867, when Pieter Glasz opened his hulling mill in Joure, in the north of the Netherlands. Today that same windmill stands proudly bearing the logo of the Promill brand, a symbol of quality and reliability.

During the last 150 years, Meelunie has become a global player in the supply chain of plant based products, like starches, fibers and proteins. This has resulted in being the largest distributor of tapioca starch in Northern America. By having expanded the portfolio with potato by-products and dried fruits and vegetables, Meelunie increasingly becomes a more important player in the pet food industry.

Providing what clients seek

The company offers a wide variety of sustainably produced products. Its pet food ingredients meet the three criteria that customers seek: good value-for-money,

reliably supplied and meeting the toughest quality standards. Over the decades, it has drawn on long experience to develop a thorough knowledge of the pet food market, working with partners to help move the industry forward and provide its customers with healthy, balanced products that are cost-effective, yet innovative.

Delivering on promises

Today many of Meelunie's customers praise the company's reliability. They have been forging long-term relationships with suppliers and customers alike, an added value which goes far and beyond of what a customer would normally expect. From risk management to multi-sourcing, from quality assurance to tailor-made supply chains, the company endeavours to always meet their highest possible Product & Services Standard and to deliver on its promises.

It also prides itself on the calibre of its people. Multilingual and client-focused;

for its staff, local markets hold no secrets. They know each stage of the local supply chain inside out, from initial supplier to final customer.

Not just words, but deeds

Meelunie demonstrates its commitment to fair trade, decent worker conditions throughout the supply chain, and sustainable products and processes – not just in words, but also in deeds. It is an ambassador of the Oxfam Novib 'Entrepreneurs for Entrepreneurs' programme, which provides microcredits to SMEs and entrepreneurs in developing countries. The company has joined forces with the GoodShipping Program to decarbonise its supply chain, developing its very own Carbon Calculator that measures its total emissions. ♦

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Market trends that are changing the way we package pet food



Humanisation of pets is more relevant than ever, and as owners expect only the best for their pets, new packaging innovations are needed to be able to unite convenience, freshness, and sustainability.

The human experience for pets

In 2020, as new generations become pet owners and emerging markets are treating pets more like part of the family, the humanisation of pets across all generations is here to stay. According to Euromonitor, pets are benefitting from more spending on their health and happiness.

However, even though pets may seem like members of the family, they still need their owners to open the packaging for them. Leaders in the packaging industry are thinking of new ways that packaging of the future can be more convenient through easier resealable functionalities, shapes and sizes.

Sustainable packaging preferred

Owners are scrutinising the ingredients inside the bag to make sure their pets are eating only the best. So, optimal readability of nutritional information on the package, opening convenience and freshness are a growing demand among consumers in the US, according to the Premium Pet Packaging survey.

Yet, as demand around reducing plastic packaging increases, consumers are looking for more sustainable and recyclable solutions and packaging that is appealing, to make the pet food more distinguishable. Thus, the packaging may contribute in positioning

the food as more premium. In the same study, one in three pet owners claimed they would switch to a brand that offers a more sustainable package and 75% of customers said that they would be more favourable to a brand if it offered sustainable options.

Latest snacks in latest packaging

As humans treat their furry friends more like people, treats and snacks are a growing way to entertain pets and keep them happy. So, the latest packaging offerings have zippers that reclose to maintain freshness, come in sizes that fit every shape and treat type, and provide protection on the go.

Together with a creative strategic agency, Mondi developed a design thinking approach to create a new breed of innovative and sustainable pet food packaging solutions. These options optimise manufacturing efficiency without compromising on the look and feel of the product. Mondi's mission is to provide high-quality packaging in pet food that is sustainable by design. ♦



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Using natural antioxidants effectively

The natural pet food trend started 25 years ago in the US and has continued to expand globally. Today, premium pet foods have become synonymous with the concept of being 'natural'. A significant part of this trend has been the development of natural antioxidant alternatives to help pet food companies maintain the shelf-life of their pet foods.

Consumer demand for clean labels

Euromonitor International has consistently noted that pet humanisation and premiumisation will continue to drive the global pet food market. This is accelerating the growth of natural pet food worldwide, with consumers desiring cleaner labels, looking for safer ingredients, and wanting more sustainable options.

Specifically, there has been a resurgence in concern over the safety of synthetic antioxidants (BHA, BHT, TBHQ, Ethoxyquin and Propyl Gallate). These ingredients are facing many regulatory and consumer hurdles, which will continue to accelerate the growth opportunities for natural antioxidants.

Market opportunity for natural

The development of the natural market has been significantly impacted by the effective use of natural antioxidants to provide shelf-life extension to pet foods and ingredients. As the industry leader in providing antioxidant solutions to maintain the quality, nutrition and palatability of pet foods, Kemin has many options to support pet food companies and their ingredient supply chain. The company has a broad portfolio of formulated natural antioxidant options. Its brands contain blends of mixed-tocopherols, botanical extracts, chelators and surfactants.

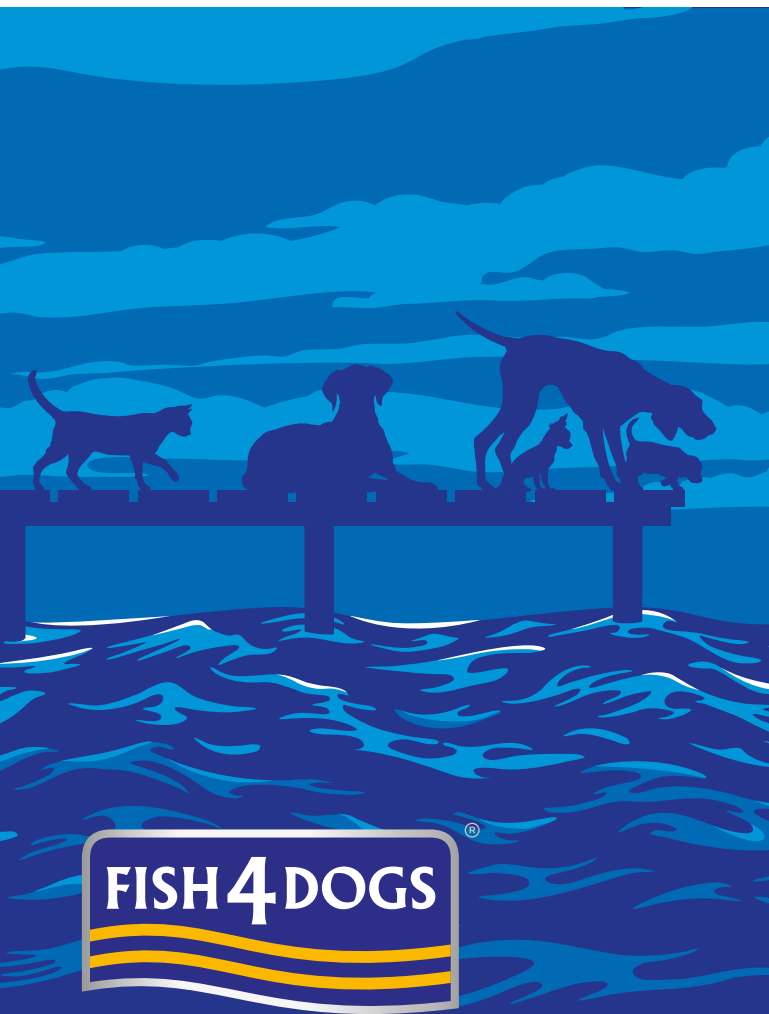
Choosing a natural antioxidant supplier

As the pet food market continues to adapt to consumer demands and the natural antioxidant market grows, it is important to build a comprehensive shelf-life stabilisation programme using high quality, stable ingredients. Pet food formulations are increasingly using novel ingredients and more unsaturated fats. This requires extensive testing and collaboration with the antioxidant supplier to identify the best antioxidant stabilisation strategy. Knowing where in the process to add antioxidant, how much to add, and what antioxidant to use, is critical to understanding how to stabilise pet foods.

Kemin provides antioxidants that help assure shelf-life and oxidative quality throughout the entire supply chain and manufacturing process of pet foods. Their wide range of tailored customer support includes product application equipment, technical support and customer laboratory services to ensure effective natural antioxidant programme implementation. ♦



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The importance of vegetable ingredients in pet food

A long and healthy life is what everyone tries to achieve for their pets. Well-balanced and high-quality nutrition with health benefits is where it all begins and a balanced, nutritious diet contains vegetable ingredients.

Vitamins and minerals

Vegetable ingredients are a good source of fibre, minerals and vitamins. Vitamins keep the pet's skin and coat healthy, strengthen bones and teeth, and give them the overall energy that they need to function. In addition, vitamins also contribute to the body's ability to resist disease.

Research has been done to see what role different vitamins play in dog and cat food. Vitamin A, for example, is a fat-soluble vitamin that mainly occurs in the liver. Dogs are able to produce vitamin A from carotenoids, but cats are unable to convert β -carotene or other carotenoids into vitamin A. Every type of vitamin B is necessary for dogs and cats to convert carbohydrates into energy. But it varies in which way it needs to be added to the specific pet food.

Natural ingredients

In addition to healthy ingredients, pet food manufacturers are also looking to add ingredients which are natural. Given the present trends in



humanisation and clean label, consumers are looking for natural ingredients in their pet's food, preferably sustainably sourced and produced. Vegetables can be the answer.

Sustainability is key

When choosing vegetable ingredients to use in pet food formulas, it is important to consider sustainability. Duynie Ingredients uses plant-based co-products released during the production of food for human consumption to produce sustainable ingredients for pet food.

By using co-products for pet food, the company enables maximal resource use and therefore helps prevent food loss. Life Cycle Assessment (LCA) proves that the environmental impact of these ingredients is lower, because they have a lower impact on land use and have a lower carbon footprint than alternatives in the market. By using these ingredients, pet food manufacturers can improve their corporate sustainability goals.

New factory

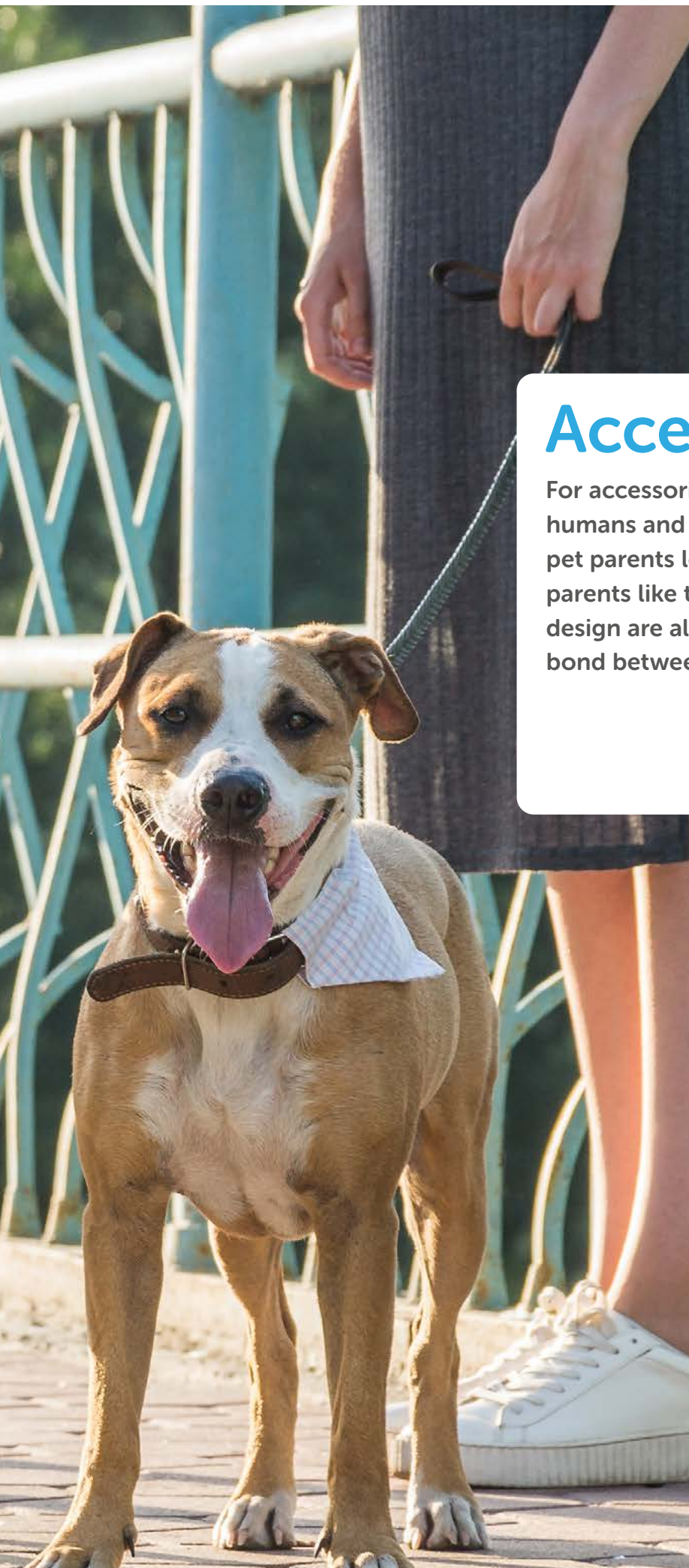
In the Netherlands, a new factory has been built to process potato and vegetable ingredients for pet food manufacturing. The wet incoming products are dried with renewable energy, which means residual heat and green electricity, instead of fossil energy. The residual heat is generated by a bio-energy power station, burning wood chips sourced naturally by environmental pruning.

Dried ingredients are easy to handle and manage and can be ground or cut to the right consistency for use in pet food or muesli. Carrot (granulate, flakes, cubes), bean granulate, spinach powder, pumpkin flakes and sweet potato flakes are some of the ingredients produced in this new factory, which is the largest in Europe, producing sustainable plant-based ingredients. ♦



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Accessories

For accessories, the distinction between humans and pets is fast diminishing. What pet parents love, so do their pets (or so pet parents like to think). Bespoke, unique and design are all at the service of the personal bond between parent and pet.

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Interior design that meets the physical and emotional needs of pets

As pets are increasingly becoming part-and-parcel of our lives, and as living space is becoming smaller in urbanised areas, creating homes that respect each person's and animal's characteristics and needs, is necessary for a harmonious coexistence.

A multidisciplinary approach

A pillow on the sofa, a basket with a cover, toys left lying around: all have in common that they fall short in satisfying the needs of our puppies. It is why pet accessory manufacturers are looking for solutions that meet both pet and human in-house needs in terms of products and materials.

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Accessories

The need for movement, sensory skills, and the development and maintenance of an emotional balance are counting on flexible design for fitting solutions.

Moving beyond the simple insertion of the pet product in home furnishings, furniture and interior design have moved forward to focus on the specific needs of people and pets coexisting in a limited space. In doing so, design takes advantage of a multidisciplinary approach that meets all needs of indoor pets.

Physical and emotional needs

The domestic life of our pets comprises both physical and behavioural challenges. The need for movement, sensory skills, and the development and maintenance of an emotional balance are counting on flexible design for fitting solutions. Especially, if it is necessary to reconcile the needs of pets with the aesthetic preferences of the owners. Already, there are a number of such solutions on the market. These include resistant and functional furnishings made of natural materials and designed based on pet anatomy.



Book cupboard shared by cat and owner

Books compete for space with the house cat who claims and conquers his hunting and exploration ground. So now there is a book cupboard that can be shared by cat and owner. Made in modules, the cupboard enables the cat to conquer raised spaces, enhancing his feline nature and facilitating the correct channelling of his physical and emotional energy.

Designed to promote interaction

Desks and sofas that are designed for sharing: such static elements can be turned into hybrid elements for interaction, without compromising their primary function. The key words here are play and relaxation for all family members, including your pets.

Custom-made bedding and showers

This trend is not limited to furnishing and accessories only. Started as an eccentric whim, dedicated pet bathrooms are now popular in city dwellings. Typically, such bathrooms have themed tiles, specially designed sanitary ware, and lockers and shelving for all the accessories of our furry roommates.

But, the challenge of developing products with high aesthetic and functional value also extends to the exterior of our homes. What about roof tiles that act as houses for city-dwelling birds? ♦



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Luxury to the max for pet parents and pets



The things that pet parents find important for themselves, are just as important for their pets. In an age of individualism and self-expression, unique and quirky pet accessories are in high demand.

Standing out from the crowd with your pet

The majority of pet parents are millennials. This age group has a strong desire to possess items that underline their unique, personal taste and that can be flaunted on social media. But, what counts for them, also counts for their pets.

Not surprisingly, luxury pet products such as pet fashion, collars and leashes and unique luxury beds, are in high demand. After all, they are the best way to show the world how much you love your pet!

Exclusivity versus luxury

There are two things that have traditionally marked a product or brand as being luxury. First is high-quality craftsmanship. Second is exclusivity. Although luxury is often thought of as showing off to others, exclusivity is what millennial pet parents are looking for!

Here is a Top-5 of most exclusive (and luxury) pet accessories ever made:

- Thai jewellery designer Riwin Jirapolsek crafted a dog tiara from top-quality titanium, embellished with diamonds and emeralds. Estimated value: \$4.2 million (€3.7 million).
- The Amour, Amour dog collar by I Love Dogs Diamonds has no less than 1,600 hand-set diamonds, totalling 52 carats. The strap is made from 18-carat white gold and crocodile leather. Estimated value: \$3.2 million (€2.8 million).
- Louis XV Pet Paviliona flamboyant bed that is styled after an 18th century French Rosewood commode.

The bed is yours for \$23,990 (€21,484).

- Michel's VIP Parfums for dogs are offered by invitation only 'due to high demand and limited quantity' according to their website. A fancy unisex perfume has top notes of Mandarin blossom and pink grapefruit. It contains the essence of the rare Osmanthus flower, which only blossoms every couple of years. This precious fragrance is packaged in hand-crafted crystal bottles, each numbered and signed and costing \$4,000 per 4 oz. (€3,582 per 120 ml).
- The Royal Crown Derby dog bowl is a hand gilded porcelain bowl, embellished with 22-carat gold. It comes in 'cheap' in this list, costing a mere £500 (€565 / \$631).

More choice

A recent survey by PETS International and Yummypets about what pet parents in Europe think of fashion and design in pet accessories* revealed that more than half of the parents would like to have more design choices. The over-the-top luxury products listed above are hardly within reach of most millennial pet parents. But they can be used as inspiration for bringing to market affordable accessories that have that exclusive and luxurious look. ♦

*See PETS International magazine issue March 2020, page 33.



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Novelties and innovations in the pet accessory industry

This coming year, watch out for a number of exciting pet accessory innovations, largely modelling those of their pet parents!

Pets and their accessories

Pets are family. A sharp rise in the fashion accessory market for pets reflects the trend amongst owners to treat their pets as important family members. As usual, dogs dominate the market: 63.4 million US households own a dog, 42.7 million own a cat, and 5.4 million own other small animals.

Looking at novel accessories for cats, the latest include a phone-controlled cat toy that you can pilot around your home using the linked app, thereby enticing your feline friend to indoor activity. This is ideal for cat owners working outside the home or for indoor cats who otherwise get insufficient exercise.

It is not only cats that stand to benefit from another novelty: pet cams. Such cams often include remote



control treat dispensers with microphones, enabling the owner to talk to the pet.

Of course, taking pictures of your pet is nothing new, but now high-quality photos are perfect for posting on social media platforms such as Instagram. Phone accessories help you take that perfect photo of your pet while looking into the camera. For instance: phone attachments into which you can clip a ball or treat at a variety of angles, or with a sticker so that you can attach your phone to the wall for a hands-free shot!

Toys and treats

As for activity toys: the choice in products is huge. Take the iDig by Fetch: a multi-layered dog toy with removable, washable fabric layers, for hiding toys

New pet 'dress up' outfits resemble popular licensed characters, such as Marvel heroes or Pokémon.

and treats. This practical innovation also has a folding version for smaller modern homes.

Novel treat food ideas include customisable cookies for dogs (organic, gluten free, dairy free), and gourmet treats in all shapes and sizes, with beautiful icing designed for humans to show their love (to a pet who probably doesn't care!). Probiotic treats are also in line with the human desire for health – goat milk and even yak milk feature as new ingredients. Or why not try out home baking pet biscuit and birthday cake mixes? They guarantee an even closer bonding experience!

Almost human

Controversially, since they really are unnecessary, new pet 'dress up' outfits resemble popular licensed characters, such as Marvel heroes or Pokémon. Welfare-diminishing aspects of pet clothing may be clear, humans seem to look at aesthetics only. And their pets are forced to adapt.

Along with the growing interest in pet services, comes more 'end of life' care, including palliative services for terminally ill pets. And when the much-adored family pet passes away, there is a choice of private pet cemeteries and bespoke cremation services (including grief consulting).

But, pets as social enablers come up trumps: a US-based 'dog dating' app now allows like-minded owners to reach one another and plan dog-friendly dates. ♦



Karen Wild, CCAB
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Advertorials



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This year Wahl GmbH relaunches its proven Professional pet clipper assortment with a new fresh look for every grooming salon & vet clinic.

The KM5 will come in the 2020 trend colour mint green, the popular Super Groom and Super Trim will change into a noble rose gold, whereas the Bravura will appear in an elegant moonlight blue dress.

Additionally, the brand for professional pet grooming at home, MOSER Animalline, has now a new digital face: moser-animalline.com.

The new website is not only a window to the brand and its products; it is also a guidance and learning platform for pet owners and b-to-b customers to broaden their knowledge and get the most support from the coat care expert.

Wahl GmbH

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Lex&Max THE NETHERLANDS Eco-leather baskets

This attractive dog bed is made of high-quality Eco-leather. The leather look is very credible and the colour fits perfectly with the popular leather sofas. Available in 5 sizes.

The Lex & Max 'Alaska dog bed' is a beautiful stylish basket with sturdy raised edges. The edges are filled in such a way that the dog can lie comfortably against them or rest its head on them without the edges collapsing.

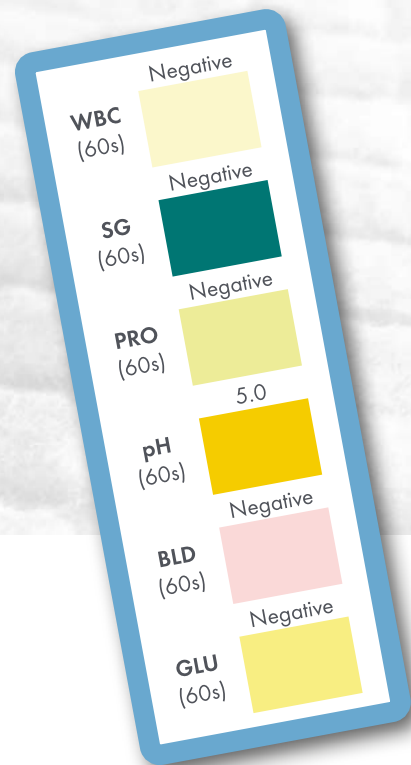
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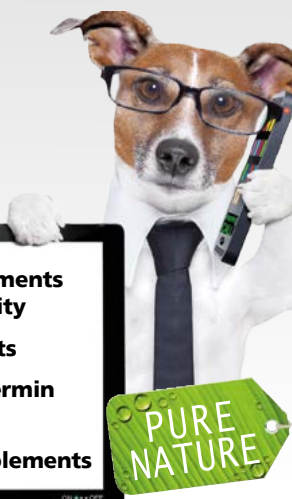


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Accessories

The importance of personalisation

Nowadays, human marketing trends are a sure-fire indicator of where pet trends will go next.

A species-transcending trend

One trend that has transcended species, is personalisation. Over the past few years, we have seen a growing movement away from 'general', one-size-fits-all products for humans to exclusive and unique products. In fact, consumers prefer bespoke articles that make them stand out from others and match their own taste. Now, this trend is also being widely applied to pet items, such as food, accessories, medication and wellness.

Food and health

Also in food – with consumers becoming more focused on ingredients – pet owners are less happy to settle for standard pet foods. Nowadays, they are as concerned about nutritional value for their pets as they are for themselves. This means pet parents are becoming more discerning: wanting only the best ingredients and healthier options. One trend is for more fresh food, and made-to-order pet diets. Whilst these products tend to come at a higher price, pet parents are happy to spend more of their disposable income on quality meals for their beloved pets.

Similarly, on the health side, owners are keen to find tailored solutions to their pets' needs. According to Animal Biome, 20% of people suffer from chronic digestive conditions like colitis, inflammatory bowel and other disorders. A similar percentage of pets has these disorders too and many more suffer from food sensitivities.



Companies such as Mixlab, provide personalised medications and wellness products for such sensitive pets. When a prescription is received from a vet, the company customises the dosage for the pet's size and type. They can also have the medication mixed into a preferred flavoured treat (as indicated by the pet parent) that is easier to administer.

Personalised subscriptions

Likewise, in the accessories sphere, one-size-fits-all solutions are no longer the only option on the market, with the advent of personalised subscription boxes such as Pupjoy.

Such companies are smartly combining technology and data to offer mass customisation of pet products. For example, they offer home-delivered and bespoke subscription boxes based on users' preferences and animals' sensitivities. 'Boxes of pet happiness' can

contain a wide range of items such as treats, chews, toys, and other accessories, as well as wellness products like supplements for preventive care.

Bespoke products and services tend to have the attractive benefit of higher loyalty. After all, once a pet likes its diet and particular accessories, the pet parent is unlikely to switch. So, overall, personalisation is definitely worth considering as your customers' demands become more sophisticated. And, importantly, it is clearly a great tactic to improve customer retention! ♦



Helen Bennie
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MyFamily ITALY

MyFamily – So much more than just ID tags

Unique designs, based on the finest Italian artisanal traditions, are turning ID tags into pieces of pet jewellery.

Success based on a long tradition

Italian-based company MyFamily, founded in 2010, has forever changed our concept of pet ID tags. Its products are built on the historic goldsmith tradition in Valenza Italy, where the company has its headquarters and origins. With unique designs, over 600 styles and wide-ranging collections, they are setting the standard in the pet ID tag category. And now, based on their success, they are introducing revolutionary lines of collars and leashes, with the same dedication to innovation and quality, as can be found in high fashion brands.

Innovation is key

The challenge today is to create things that have both functionality and beauty. All MyFamily products are manufactured in-house, including such patent pending concepts as HushTags. These ID tags combine rubber and metal, so that they produce no noise when worn, while

looking better and lasting longer than traditional tags. Another innovative concept is the Always Ready D-Ring, that eases the anchoring of the leash on the collar, as it always automatically falls back into the same position.

Distinctive quality loved by pet parents

Available in more than 60 countries worldwide, MyFamily products are the choice of millions of pet lovers. Each collection has a distinctive style, giving pet lovers the choice to match their taste with the character of their pet. With so many designs, there is always something perfect for every four-legged friend.

ID tags engraved in just two minutes!

The company offers pet specialty stores an instant ID tag solution with Techla. This state-of-the-art self-service engraving

system allows customers to personalise their pet tags in under two minutes. In addition, innovative displays help retailers improve the product profile and their sales.

Eco-friendly manufacturing

Sustainability is key to all activities undertaken by the company. Currently, new initiatives have been introduced to further reduce the company's carbon footprint. For example, bubble wrap has been replaced by recyclable paper in packaging and plastic elements in tag dispensers have been replaced with cardboard bands. These steps are part of a company-wide drive to become as eco-friendly as possible, without sacrificing the overall quality the customers expect. ♦

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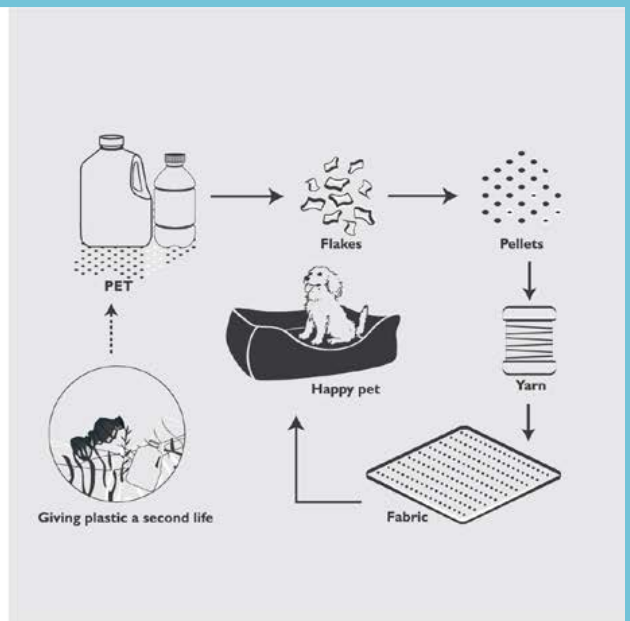
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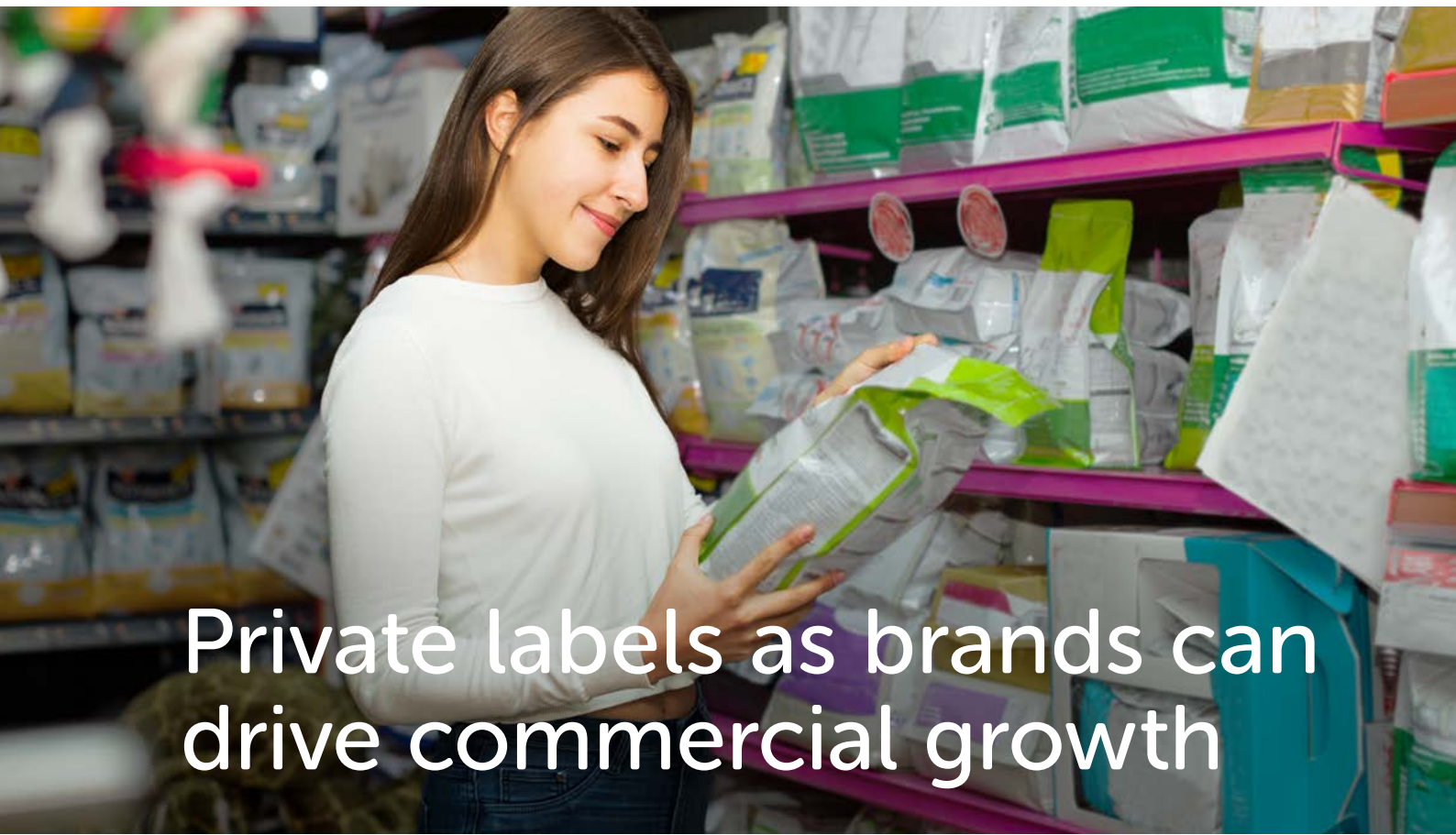
normandise
Petfood



Private labels

Whether you call them retail brands, own brands or private labels, they began as cheaper alternatives to mainstream brands. Today, the companies that make them are manufacturing many innovative, sustainable, quality products, often in successful partnerships.

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Private labels as brands can drive commercial growth

Private labels emerged many years ago as cheaper alternatives that generated better margins than traditional brands. Over time, they became brands themselves, even evolving into exclusive brands.

What is a brand?

There are many definitions of what a brand is, and these have changed as consumers themselves have changed too.

In the 1980s, 'father of modern marketing' Philip Kotler used the definition:

"A brand is a name, term, sign, symbol, design, or a combination of these, which is used to identify the goods or services of one seller or group of sellers and to differentiate them from those of competitors."

Then, in the 1990s, Dutch advertising CEO Giep Franzen defined it as:

"A brand only exists in people's brains. It is a network of associations between elements in memory. These associations are the result of joint, simultaneous processing in space and time of sensory stimuli and of thinking about different phenomena in relation to each other."

Whereas the term had first been based on the brand being a symbol, it has since evolved into 'existing in people's brains'. This is more complicated, because

knowledge of neuro-marketing is vital, including aspects such as storytelling and the impact of colour on a mindset, et cetera.

Retail brands in the pet industry

The global pet care industry continues to grow, especially private labels, also known as 'retailer or retail brands and labels' plus 'own brands or labels'.

In the competitive offline and online market, retailers must create a competitive edge to build loyalty among pet parents, react quickly to their needs and change shopping behaviour. It is therefore vital that pet retailers build a brand which links their shopping concept to the mindset of their customers. These retail brands are then seen as exclusive brands.

In today's world, pet parents no longer see much difference between traditional brands and exclusive retail brands. They are not even aware that most of them come from the same manufacturer. So this does not influence their buying behaviour. But for the industry as a whole, it is a different matter.

Private labels

Manufacturing exclusive or traditional brands

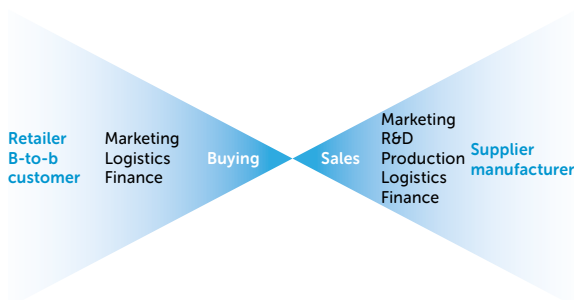
One of the differences for a private label manufacturer in producing an exclusive brand or a traditional brand is the different business partnership models.

There are two main private label categories:

- a. focusing on low and mid level pricing
- b. products with differentiation and uniqueness that are premium or super premium driven

Category 'a' is predominantly transaction-driven and based on one-year contracts, in some cases at fixed prices with non-binding volumes. It is a 'butterfly' concept (see Figure 1) that calls for efficient buying and selling processes.

Figure 1



Category 'b' is where less suppliers are able to secure a level of differentiation, exclusive recipes, et cetera. These suppliers deliver a higher degree of uniqueness, creating strong collaboration and cooperation for a number of years. The humanisation and premiumisation trend forces retailers to enter into partnerships or alliances with manufacturers.

In today's marketplace, traditional brands no longer have their own production plants. So they often rely on plants that are also manufacturing exclusive brands. With this type of partnership, the level of innovation is high, recipes are exclusive, and some items are even owned by the brand owner to secure differentiation. The model of cooperation is also different – the diamond model (see Figure 2).

Figure 2



In other words, cooperation between 'buyers' and sellers of private labels, exclusive brands and traditional brands becomes a relationship with a high level of trust.

Risk management in the collaboration/alliance model

In this model of cooperation many important challenges have to be addressed. For example, knowledge and innovation input, exclusivity, packaging development. And: who bears the risk of volatile raw materials or currency, and how to deal with the ups and downs together – for example, necessary price increases caused by rising prices of raw materials, freight, packing, transport? Or who is the first mover: retailer brands or traditional brands? What about price elasticity, the price gap between the traditional brand and the retailer label?

Figure 3. Evolution of buyer and seller relationship.



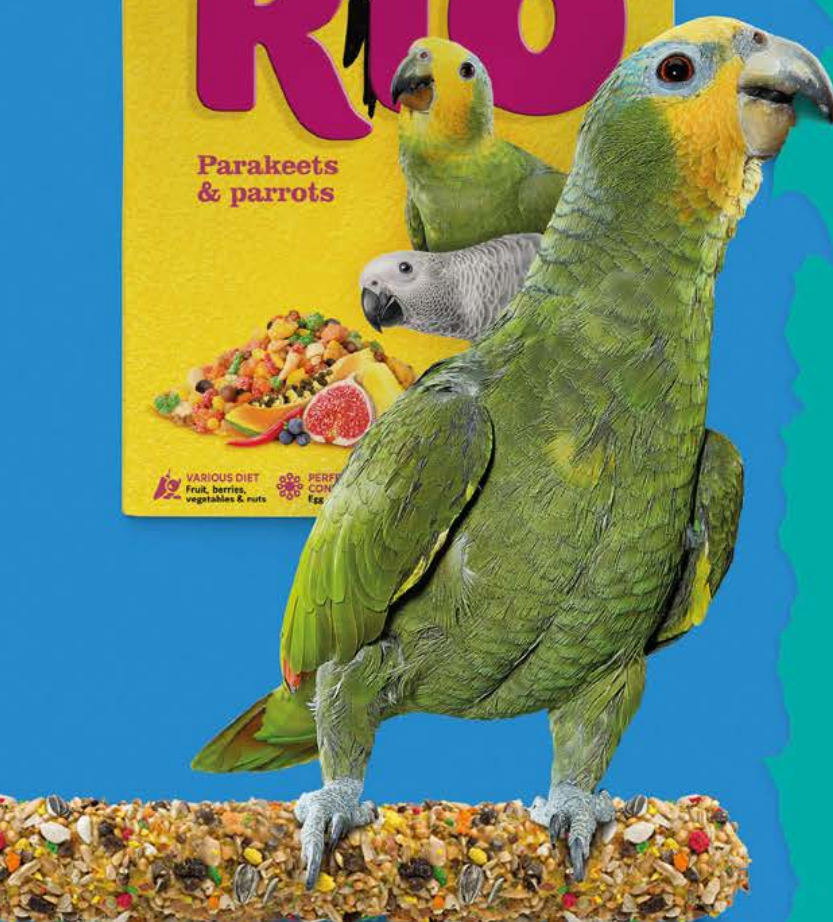
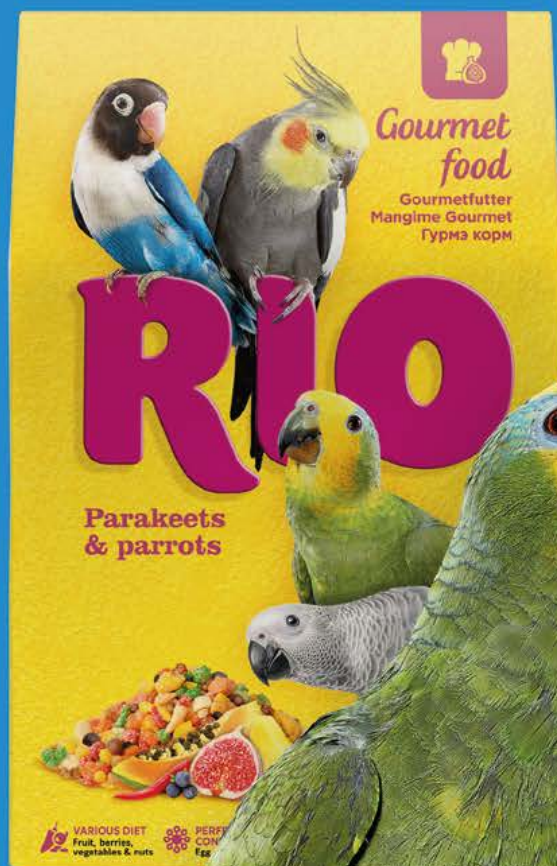
Changing times and changing roles

Pet retailers need private labels to evolve into exclusive brands so that they can differentiate and compete in both offline and online channels. The consumer sees fewer differences between retailer brands and traditional brands. But this development does affect the retailer's relationship with the producer, as roles change from purely manufacturing into partnership models. ♦



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Offering the best for pets

La Normandise is a private label producer of pet food in pouches and aluminium trays. Founded in 1991, the company specialises in highly nutritious wet and dry food for cats and dogs.

Wide range of products

The company's mission is to develop, manufacture and distribute premium quality pet food products packed in trays and pouches, always aiming to satisfy the needs of cats, dogs and their owners. Its product range offers more than 500 recipes. Varied and balanced, and in multiple formats, they are made to precise and meticulous specifications – from very simple to quite complex compositions.

First French organic brand

Over the years, La Normandise has developed several own brands. This includes Équilibre & Instinct, the first pet food brand based in France to develop wet and dry products made of 100% organic ingredients. The brand was established with a clear vision: respect for the pet's balance and instinct. These products are 100% raw meat and fish materials,

mainly sourced within Europe with 90% from France, including up to 60% fresh. They must comply with strict hygiene and traceability regulations, from slaughtering to manufacturing.

Sourcing fresh ingredients

Fresh meat ingredients – declared healthy for human consumption – are directly sourced from slaughterhouses and processed within 48 to 72 hours. The raw materials are selected very carefully, and checked on receipt to confirm their state of perfect freshness.

The primary benefit of fresh meat is that it provides an essential source of proteins while delivering better palatability and digestibility. To avoid an overload of lipids, the recipes are mostly composed of lean meats supplemented with rendering industry products such as kidney, liver

and heart. This gives the food its natural taste and aroma. It is a balanced nutritional formulation, providing better assimilation of proteins, with equal weight better adjusted to the physiology of carnivores such as cats and dogs. It is also more digestible, preventing the intestinal problems that are so common.

Certification

An independent body provides certification that guarantees and qualifies the origin and quality of the raw materials used, whereby traceability is key. By buying a product with the AB logo (Agriculture Biologique), the pet owner can be certain that it has no GMOs, preservatives or synthetic additives. ♦

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Fish4Dogs producing European quality in China for China



The 2017 Queen's Award for Export and numerous industry accolades, including the 2019 GlobalPETS Forum Business of the Year Award, highlight the sustained success of this pioneering business. China is now an increasingly important market.

Expansion eastwards

Fish4Dogs has become an internationally familiar and much-loved brand. With its sister brand, Fish4Cats, sales have grown rapidly since the UK company's modest beginnings in 2004. Nowhere has this expansion been more marked than in Asia, with brand share in China outstripping the already impressive market growth, and revenues forecast to continue their rise in the medium-term future.

Going to where the customer is

As part of its continued commitment to the Chinese market, Fish4Dogs has entered into a joint venture partnership with Pet Innovation Holdings, its long-standing exclusive Chinese distributor. The partnership company Fish4Dogs Foshan Co. Ltd is building a state-of-the-art factory in Guangdong province to optimise the supply chain by producing kibble *in China for China*.

Ready for future growth

Pets International's Corine van Winden, spoke to Toby Hart, Business Development

Director, about the project. "We are massively excited about this latest development," he says. "Fish4Dogs has lots of experience in manufacturing – we own our factory in Norway – so we are able to incorporate the latest thinking into this new build. We are gearing up for significant growth over the next fifteen years too. With Bühler extrusion equipment and high fresh-meat handling capacity, we think we will be able to respond to the changing demands of this high growth market."

As well as being the bedrock of the SAP-based production systems, quality and robust manufacturing is the starting point for the design of the building. With BRC accreditation planned within the first year, and European end-to-end transparent operational practices, the company is confident that this is a facility that will attract interest from other brand holders.

Guaranteed quality

Regarding the complexity of the region, Toby Hart explains: "We know just how

appealing the Chinese market is to pet brands, but there is also lots of complex legislation around the importation of foods. One of the real advantages of producing in territory is a lighter regulatory burden with good local scrutiny. We are building pre and post production laboratories so that customers can enjoy absolute confidence in the consistent reliability of what we make."

He continues: "We really understand the importance of this as brand proprietors, and we are setting ourselves the same exacting standards as contract manufacturers. Our customers can be sure of a good experience, time after time."

The road ahead

Based on a decade's worth of Chinese market knowledge, and with solid manufacturing skills, Fish4Dogs Foshan Co. Ltd looks firmly towards the future. ♦

♦ **Fish4Dogs**
toby@fish4dogs.com
fish4dogs.com

Aller Petfood RUSSIA

The company that catalysed the Russian pet industry

When Danish company Aller Petfood decided to expand into Russia, they went on to turn the pet food market upside down. PETS International arranged an interview with CEO Henriette Bylling to hear about then and now.

Family business

99 years ago, the Bylling family bought the ancient Aller mill on the Danish mainland, where they started to produce food under the name Aller. After multiple expansions into different niches, the company started to produce pet food in 1979.

Challenges: past and present

Fifteen years ago, Aller Petfood entered the Russian pet market with a mission: to introduce the concept of private labels. As this was something completely new, the process required much effort. But both pet parents and pets gradually got used to consuming private label products. Aller had a monopoly for a while, although Henriette

Bylling realised that things would change. So she kept raising the bar and preparing her team for future competitors. It was only after approximately ten years that the competitive situation changed, but Aller continued to have the largest market share.

Not only did competition change over time. The challenges facing the company in Russia have changed as well.

When Aller started there, it had difficulty sourcing quality raw materials and training suppliers to high standards. The challenge now involves coping with substantial and continual changes to government regulations.

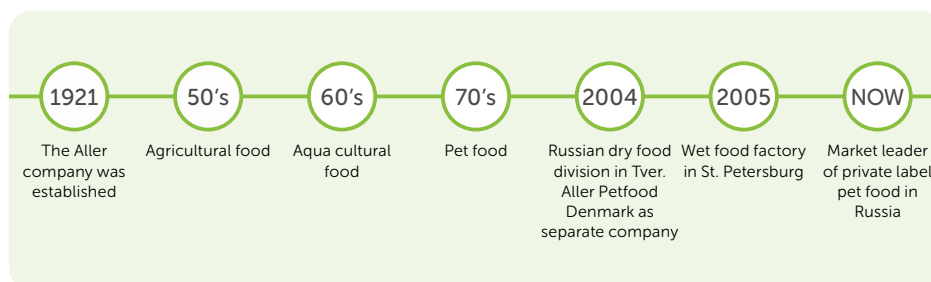
Product partnership

Aller aims to be more than just a product. That is why it supports its customers throughout the development process and beyond. It can adapt its service level to customers' needs by ensuring constant availability and on-time delivery. It will even go as far as sharing its knowledge, whether it is pet food expertise or market intelligence. Henriette Bylling sees the way forward in b-to-b as partnerships rather than the traditionally hierarchical buyer-supplier relationships.

When Aller meets Amazon?

Henriette Bylling says that online shopping is still small in Russia, so the impact of Amazon, Yandex, Ozon and Wildberry is not yet apparent. The company's intelligent thinking combined with a century-old business instinct has enabled them to become and, for now, remain the Russian private label market leader. ♦

♦ **Aller Petfood Group A/S**
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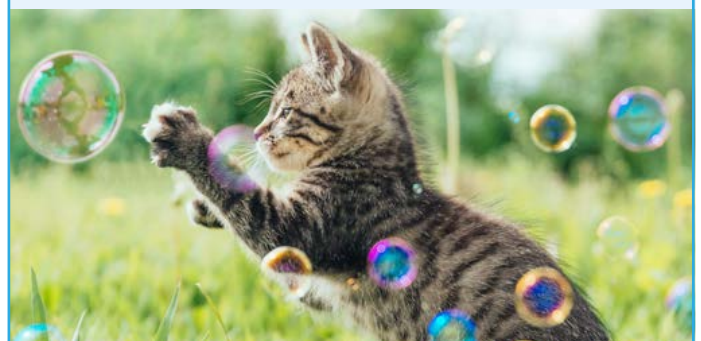
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Private labels call for true partnership

PETS International interviewed United Petfood management about their vision and market approach. The word 'united' was chosen for a reason. It refers to the strong bond the company has with its clients, who they see as partners.

Category consultant

The private label market has changed a lot over the years. Currently, the role of a private label manufacturer is that of category consultant, with new product development calling for close cooperation with the client. Cooperation starts with a joint analysis of the client's requirements – the basis for product design. To create scientifically sound products, the company collaborates with universities. They naturally always take sustainability into account. Other important facets are packaging, local raw material sourcing, and energy reduction, with the client deciding to what degree this is implemented.

The success of this company strategy, with its long-term vision and constant search for improvement, is evident from double-digit growth over the last ten years.

Global export

United Petfood is one of the largest dry pet food private label manufacturers in Europe. To enable it to grow together with its clients, the company has a network of state-of-the-art production facilities in different parts of the continent, with recent acquisitions in several European countries. This brings the production process closer to clients' markets.

The company's goal is not to be the biggest player, but to be the best based on quality and innovation. So improving the manufacturing process is where its focus lies at all times.

To maintain growth, the company is investing in export to other continents. In the last few years it has acquired export licences for China, Korea and Russia. This offers great opportunities to its clients, who can also benefit from its full administrative support. That also takes away almost all obstacles to export, opening up the world to its clients as their new field of action.

Private labels as trendsetters

Premium brands are usually owned by big players, who may have more difficulty in responding flexibly to the needs of individual consumers. So it is private labels who are increasingly the trendsetters bringing innovation to the consumer. Private brand owners need support and guidance in this from manufacturers like United Petfood. ♦

♦ **United Petfood Producers nv/sa**
hans.vermander@unitedpetfood.be
unitedpetfood.eu

Company milestones

- 1937 Factory in compound feed is founded
- 1993 Third generation joins the company
- 1994 Start of a new activity: production of pet food
- 2003 Opening of the first production site in Gent, Belgium
- 2013 Acquisition of two production sites in France
- 2014, 2015 and 2017 Further takeovers in France
- 2018 Opening of a new plant in Poland
Acquisition of plants in the Netherlands, Spain and Romania
- 2019 Opening of a new wet pet food plant in Poland
- 2020 Takeover of a production site in Italy and the Netherlands.



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Although foremost a technical clays company, Greek-based Geohellas also specialises in the production of premium quality, clay cat litter. Sourcing from its own reserves – one of the largest attapulgite and bentonite deposits in Europe – the company processes over 100 million kilos of clay every year.

Green sourcing for high-quality products

Geohellas started operating in 2004, with a strong focus on industrial products, like agricultural carriers, molecular sieve binders, bleaching earths, animal feed supplements, industrial absorbents and more. Nowadays, the company's modern processing plant has an annual production capacity of 160 million kilos and exports to 50 countries worldwide. From mining clay from its own natural reserves, to production and packaging: Geohellas' operations offer maximum transparency within a fully integrated production process. Packaging ranges from big bags to small consumer bags (paper or plastic) and carton boxes.

Cat litter as an added-value technical product

The production and sales of cat litter products started in 2007, exclusively

for private label brands. As with the rest of its technical products, the company guarantees the development of superior quality, natural clay cat litters. The company's expert and dedicated R&D department has brought high-value cat litter solutions, including clumping ultra-compact and lightweight, absorbent ones.

2008 saw the launch of Geohellas' own cat litter brands: Imperial Care®, Cat Leader® and Who Cares®. To this day, they continue to expand their network, making both branded and private label cat litter products available to clients worldwide.

Product innovations

Similarly, the company continues to invest in product innovations in order to bring the best products to pet owners and their beloved pets. For example, their European patent for a unique silver-ion based cat

litter, provides a 99.9% bacteria-free environment. The latest innovation is set to be presented at Interzoo 2020. This double odour-attack cat litter uses an advanced science aroma formula for targeted and effective odour elimination.

Responsive, reliable and committed, Geohellas follows a value-adding approach to its cat litter products, which has secured the company a growing industry reputation and the ability to expand from Greece to all five continents. ♦

♦ **Geohellas S.A.**
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Global regions

Seeing your pet as your child or your friend has led to owners being willing to spend more on pet care. The emotional support a pet can provide, as people's lives are affected by the coronavirus crisis, will continue to fuel demand for premium pet products.

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Premiumisation in pet food: beyond ingredients

For what kind of food is a pet parent prepared to spend more than usual? The key to a new successful product may well be its resemblance to human food.

Premiumisation trends: alive and well

Premiumisation trends within global pet food are alive and well. After setting a new high in 2018, the industry topped itself again in 2019 with value sales growth reaching 6.5%. Emerging regions like Asia-Pacific, Eastern Europe and Latin America continued to post double-digit gains, while North America – the world’s largest market – nearly matched the global figure with 5.8% growth. Even Western Europe, the slowest-growing region in 2019, recorded its strongest growth since 2015.

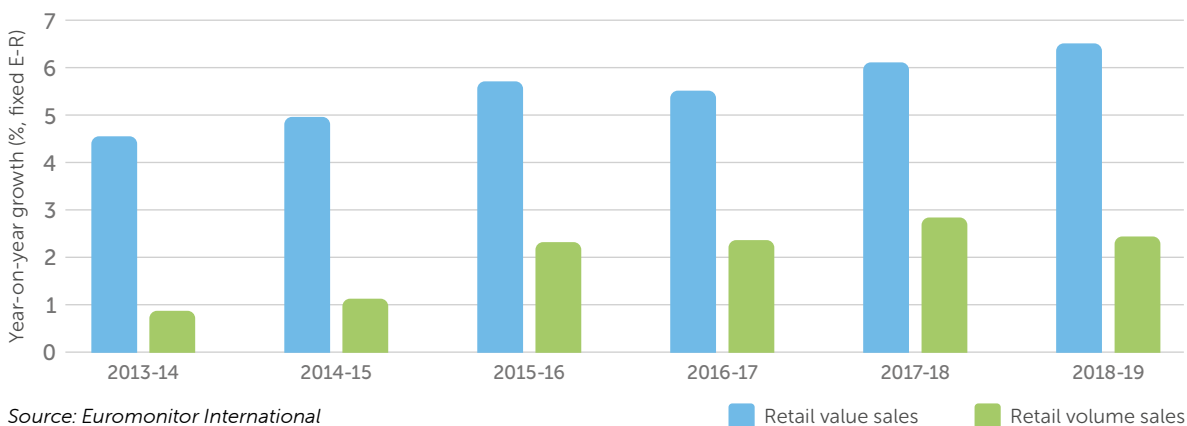
Impressive value growth continues despite modest volume increases. While pet population and shrinking dog sizes still limit potential volume growth, people’s willingness to spend more money on premium food

continues to expand. Pets are increasingly viewed as family members by owners who want quality food to keep their companion healthy, active and strong.

Premium frontiers: going for fresh

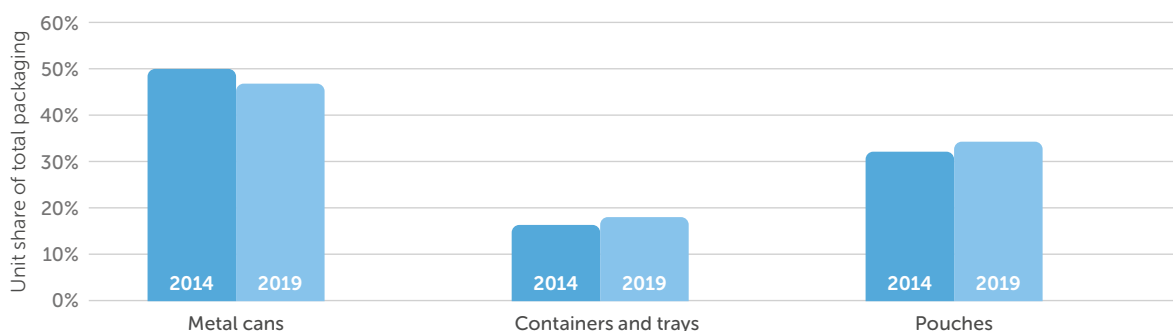
For decades, ingredients have been the primary battleground in premium food. Brands encourage shoppers to compare their ingredient list to competitors as a key point of differentiation. Ingredient-focused messages are seen in many advertising and marketing materials. While specific ingredient trends have changed over time – functional, high-meat, local, organic and sustainable traits are currently trending – this overarching focus on product formulation has not wavered.

Global pet food: annual growth, 2013-19



Global regions

Wet dog and cat food packaging: North America and Western Europe



As the industry moves into a new decade, there are signs that premium pet food may be on the precipice of a transformational shift. Owners are moving beyond ingredient lists to gauge the physical appearance of pet food. In many ways, the processing method used is becoming as important as the ingredients themselves. This change is rooted in broader dietary shifts. Dried and processed food has generally fallen out of favour as consumers gravitate towards chilled or refrigerated offerings that maintain a 'fresh' or 'less processed' image. Across the supermarket – from dips and ready meals to breakfast cereals and snack bars – shoppers increasingly view shelf-stable categories in the centre of the store as more 'processed', with longer ingredient lists, than chilled products that reside alongside store perimeters with fresh produce, bakery and meat.

New formats driving growth

Dry food commands the lion's share of global pet food sales, comprising nearly 70% of the market in 2019. As consumers look for less processed food, however, the opportunity is ripe for new formats. Wet food has been one important innovator on this front. Brands are developing product forms that resemble human foods. These could be soups, stews or fillets and are shifting from traditional metal cans (associated with processed food) to pouches, plastic containers or trays that resemble human food packaging.

Biologically Appropriate Raw Foods (BARF) also continue to gain ground as minimally processed alternatives to dry kibble. These foods appeal to pet owners by mimicking the carnivorous diets that the ancestors of dogs and cats ate in the wild. Disruptive brands like Chunky Menu Natural (Colombia), Fanni's

Barfshop (Hungary) and Barfbox (Thailand) continue to witness strong growth with freeze-dried or frozen offerings that sell at high price points.

Chilled/fresh pet food represents another major growth frontier with products that are 'gently cooked' and refrigerated to maintain freshness. These brands are preservative-free, claim to maintain the nutritional integrity of ingredients, and more closely resemble human food in appearance. Brands like FreshPet (US) and Billy + Margot (Australia) continue to expand their presence in refrigerators within retail outlets.

The explosion of direct-to-consumer brands in e-commerce has also driven tremendous growth for fresh pet food. Online-only brands like DogChef (Belgium), Lyka (Australia), The Farmer's Dog (US) and Butternut Box (UK) offer subscription-based delivery of fresh pet food to a customer's doorstep. Online business models also allow for customisation, with recipes designed for each animal's breed, age, activity level, allergies, et cetera.

Judging by appearances

The future of premium pet food will increasingly be defined by physical format. Regardless of ingredient claims, dry kibble faces threats from wet, frozen, freeze-dried, refrigerated, fresh or chilled products that look like human food, claim to be less processed, and mirror the choices pet owners are making in their own diets. ♦



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Global trends according to Mintel



While the US remains the largest global pet food market in volume sales, the Chinese market is rapidly expanding, as one of Mintel's top five fastest growing markets. What are the latest food trends there and elsewhere?

Concerned Chinese pet parents

While China is a shining star in the pet food sector, it still has a long way to go before reaching maturity, underlining the huge potential it holds for pet food brands. Fuelled by a growing trend of singlehood and childlessness, Chinese people's interest in pets and dedication to them has been rising.

Owners tend to see pets as their friends, or even children, which drives their willingness to spend more on their companions. Chinese pet owners increasingly look for pet food products that mirror their own

attitudes, lifestyles and concerns. Pet food brands are doing all they can to convey naturalness, highlighting raw materials, origin and alternative processing methods such as freeze-drying, air-drying and steam cooking.

Veterinary herbs

Concerns about pets' health are driving Chinese pet owners to embrace preventive care. More veterinary pet food ranges with functional claims have come onto the market, often underpinned by the addition of Chinese medicinal herbs.



Vigor & Sage Ginseng Well-Being, with fresh chicken & seaweed, is an example of a complete adult cat food that provides a holistic combination of carefully selected fresh meat, beneficial herbs, fruit and vegetables. Cookeys Freeze Dried Chicken for Cat is made using natural fresh ingredients, and is processed according to a freeze-drying technique to lock in nutrients and taste.

US superfoods for pets

Americans look at all the products and services available to them and ask themselves: 'why don't they have this for my pet?' And products for pets are looking more like products for people as time goes on, from fresh food delivery to anti-anxiety offerings. This is one of the major factors driving the US market forward.

In the UK, a plant-based diet is high on the agenda.

Appealing to superfood-loving pet owners, Halo Healthsome Garden of Vegan sweet potato, carrot & quinoa dog treats comprises US-sourced vitamin-rich root veggies, with protein from chickpeas and superfood quinoa from South America.

Digestive health in the UK

In the UK, a plant-based diet is high on the agenda. Mintel research shows a third (34%) of UK dog food buyers believe it is good for pets to regularly have a plant-based meal instead of a meat-based one.

Following other human food trends, Mintel research reveals that digestive health is also important, as three-quarters (76%) of cat and dog food buyers believe that actively looking after pets' digestive health is essential for their overall health. They are joined by 44% who believe that pet food with 'good bacteria' (such as fermented foods) is good for pets' health. This comes as 42% of pet food buyers consider their pet a 'foodie'. ♦



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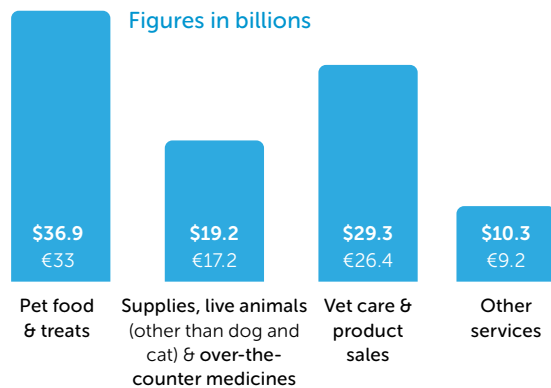
ADVANCING THE PET INDUSTRY



The pet market in the US is booming, with 85 million households now home to a pet. Emerging generational trends promise good things for the industry.

Two-thirds of homes have pets

The American Pet Products Association (APPA) reports a steady incline of pet ownership over the past 30 years, with pets now in 67% of American households. Recent APPA figures put total US pet industry expenditures for 2019 at \$95.7 billion (€85.7 billion), with an estimated projection of \$99 billion (€88 billion) for 2020.





*Opportunities are everywhere,
even in new and unusual places.*

Health benefits of pet ownership

The benefits of having a pet are unquestionable. We strive to make their lives better because they improve ours too. With the stresses of today's uncertain world, there is no better mood elevator than our pets. APPA's National Pet Owners Survey reports that 76% of current pet owners say happiness and emotional support are health benefits of having a pet; 63% say stress relief and 52% say less anxiety and depression.

From humanisation to premiumisation

The humanisation of pets continues to drive premiumisation, particularly in food and treats. Moving from mainstream to premium gives brands growth opportunities and customers added value. Today's knowledgeable consumers see value as a combination of quality, price, and their experience of the product, its packaging and its overall appeal. Some drivers in this category are sustainability, increased quality, human-grade ingredients and alternative proteins.

Generationally speaking

The boomers and millennials are primarily responsible for fuelling industry growth. Boomers spend more than millennials on many product categories, plus vet care and grooming. Millennials are willing to spend

more money to buy their pet, and are more likely to purchase food from their vet and to try categories like specialised food and treats, calming products and holistic remedies. Brand name remains important to them.

Online purchasing

Online spending among US pet owners continues to escalate. 72% of them purchase online, with 39% of those purchases subscription-based. It is no surprise that millennials do the most online shopping. In food alone, over one-quarter of their online food purchases is subscription-based.

Nearly 30% of pet owners say their online shopping frequency has increased in the past year. More millennials and Gen Z have increased online shopping (39% and 37% respectively) than older generations.

Make room for the roost

Opportunities are everywhere, even in new and unusual places. For the first time, APPA studied backyard chicken ownership and found that roughly 10 million US households keep chickens and three-quarters consider them to be pets. Especially popular among younger generations, pet chickens join the ranks of beloved pets, a trend that is here to stay. ♦

Source: APPA
americanpetproducts.org



GlobalPETS Forum Asia: Branding & Design

As China starts to recover from a difficult period for the country, preparations for the 6th edition of GlobalPETS Forum Asia are underway. Save the date: 13 November 2020 in Guangzhou, China.

Global regions

Fast-growing Asian markets

Asia is one of the fastest growing markets in the world. According to Euromonitor, China – the largest pet market globally – showed an average increase of 20% in the past few years. iiMedia Research, a leading third-party data mining organisation and integrated marketing agency for mobile internet, say that China's pet industry had grown to ¥170.8 billion (€22.3 / \$24.1 billion) in 2018, with a growth rate close to 30%. They forecast that the pet market in China will reach ¥300 billion (€39.2 / \$42.5 billion) in 2020.

Research conducted by the Japan Pet Food Association has shown that the number of pets in the country, 18.5 million in total, has now exceeded the number of children. According to a report by the Korean Economic Research Institute, the size of the Korean pet market will reach KRW60 billion (€45 / \$48 million) in 2020. The Southeast Asian market is also increasing at a double-digit rate.

This fast-growing Asian market means manufacturers need to focus not only on product quality, but also on branding and design to attract consumers. Therefore, the subject of the GlobalPETS Forum Asia is 'Successful branding and design strategies'.

Branding and design in today's world

Global trade sounds attractive, but how do you build a cross-border brand? In today's world, building brands is more complex than ever, with the many online and offline shopping platforms available.

So how do you create a brand with a modern identity that is successful on different platforms? Building a brand is not only a matter of having a good product. It is a complex combination of all kinds of issues such as product design, packaging, finding the right business partners, et cetera.

What will you discover at GPF Asia?

- in-depth information on the Chinese market
- when a private label becomes a brand
- how to build a strong international brand
- what we can learn from international, Chinese and European brands
- the impact of online platforms on brands and private labels
- what you should focus on to create product design that works

Network and connect

At the Forum, you will be able to network with 300+ industry leaders and dive deep into the growing Asian markets. On top of that, you will have full access to 1,500+ CIPS trade show exhibitors.

Retail tour in Guangzhou

This retail tour on 14 November will take you to modern pet stores and other new retail formats in Guangzhou. It will teach you about Chinese cutting edge retail formats and customer behaviour. Bear in mind that China is set to become the largest retail market, according to eMarketer. As of now, one-third of global household consumption growth is caused by Chinese consumers, according to the McKinsey China Consumer Survey Report (2010-2017).

The price

€595

Early Bird price: €545 (before 31 August 2020)

The organisers

This event is being organised by CIPS in co-production with GlobalPETS Community. ♦

For further information and registration, visit:
globalpets.community/globalpets-forums-en.CIPScom.com



UK and EU: 'In, out, shake it all about!'

A possible no-deal Brexit may be overshadowed by the COVID-19 crisis. AMA Research considers what this means for the UK pet accessories market.

After the fact

While the question of 'In or Out?' has finally been settled, and the UK has been operating at the edge of Europe since 1 February 2020, the 'shake it all about' phase of trade deal negotiations still has to be settled.

AMA Research have investigated what precisely are the current and future implications for the £1 billion (€1.1 / \$1.2 billion) UK pet accessories market.

Stockpiling

While there was some stockpiling of products, particularly pet foods, in the run up to the original March 2019 deadline, subsequent deadlines passed with much lower, if any, stockpiling activity taking place. The Christmas period was positive, with good growth, particularly for pet toys and clothing. It emphasised the tendency for British owners to treat pets as members of the family, to the extent of buying festive costumes and stockings filled with treats.



The beginning of 2020 has remained positive but with growth levels slightly lower lately, as UK consumers ease back on non-essential spending.

Potential price pressures

The market is relatively resilient, with the humanisation of pets an underpinning factor. There are polar opposites, however, with the niche, higher value brands at one end and the lower value, import dominated sector at the other. While the rise of online

shopping for pet accessories has led to significant price transparency, and therefore price pressure within this lower value sector, the outlook under a 'no-deal' could see the pressure increase as the UK trades under WTO conditions. This in turn could lead to increased import prices, and suppliers may try to absorb price increases in order to maintain market share.

Buyer behaviour

Although overall consumer spending has been restrained for many products over the last year, the over-compensation of some pet owners has continued to underpin value growth for pet accessories. This manifests in multiple purchases by some owners of products such as feeding bowls and clothing. In addition, the premium ranges of matching outfits for pets and owners is unlikely to be affected by price increases as the 'must have' aspect continues to outweigh the cost.

Effects of the pandemic

At the beginning of March, trade deal talks between the UK and EU started in earnest as both sides try to achieve a mutually beneficial conclusion. However, the UK pet accessories market faced further potentially more damaging 'shake it all about' ramifications in Q1 2020. The spread of the COVID-19 virus has led to some extreme quarantine procedures and is also affecting manufacturing productivity levels. As the virus has now gone into the pandemic stage, it could have further, more devastating implications for manufacturing and global trade. ♦



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Calendar of events



PETZOO Antalya

18 to 21 June 2020

Expo Antalya Exhibition Center
Antalya, Turkey

petfuari.com/antalya/en/petzoo-antalya



SuperZoo

1 to 3 September 2020

Mandalay Bay Convention Center
Las Vegas, United States

superzoo.org



Pet World Malaysia 2020

26 to 28 June 2020

Mid Valley Exhibition Centre
Kuala Lumpur, Malaysia

petworldmalaysia.com.my



ParkZoo

9 to 11 September 2020

ECC 'Sokolniki', Moscow, Russia

parkzoo.ru/en/



Pet Fair Asia

19 to 23 August 2020

Shanghai New International Expo Centre
Shanghai, China

petfairasia.com/en



PATS Telford

27 to 28 September 2020

Telford International Centre
Telford, United Kingdom

patshow.co.uk



India International Pet Trade Fair

29 to 30 August 2020

Pragati Maidan Hall No 7 FGH
New Delhi, India

www.iiptf.com



Pet Fair South-East Asia

14 to 16 October 2020

Bangkok International Trade &
Exhibition Centre (BITEC)

Bangkok, Thailand

petfair-sea.com

For the latest event information, check: globalpets.community/events

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Colophon

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