



PETS International

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Ingredients and production

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

Natural pet food

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

Italy

The positive development of the Italian pet industry continues.



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Highlights in this issue

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

Ingredients and production



Pet food and the latest innovations in packaging.

Natural pet food



GlobalPETS Forum Europe



The positive development of the Italian pet industry continues.

Italy

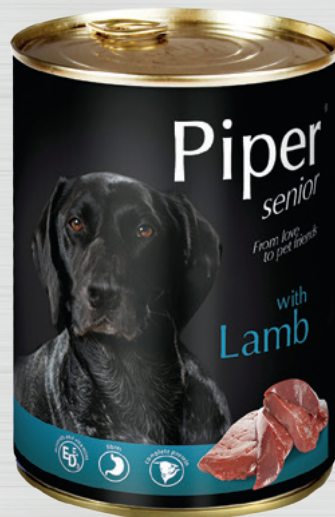
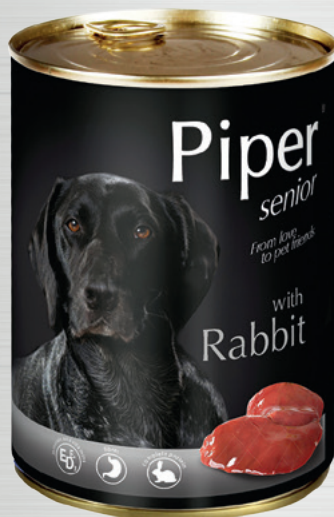
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Raw

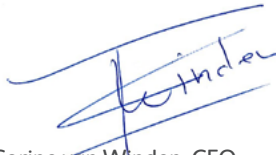
Although it has been around since the 1970s, raw pet food is coming of age. Growing at an astonishing rate over the last few years, it has become a category in itself, alongside dry and wet pet food. There is, however, still a 'love it or hate it' attitude to raw pet food. Those in favour emphasise the advantages of a natural, meat-based diet, while their opponents seem mostly concerned with pet food safety risks.

To start with the latter, the 'Ingredients and production' section of this issue of PETS International (page 10) discusses the ins and outs of testing raw materials. You can read about the importance of raw material testing as a strategic management tool, and about risk management and quality assurance.

In the 'Natural pet food' section (page 32), we highlight natural pet food in general and raw pet food (or BARF) in particular.

Also in this issue (page 58), you will find an extensive preview of the next edition of our European conference. GlobalPETS Forum 2018 will take place from 24 to 26 January 2018 in Venice, Italy. Three of our keynote speakers have written an introduction to the topic they will be speaking about, and you can also find out who are nominated for this year's GlobalPETS Forum Award.

And as the GlobalPETS Forum 2018 will be taking place in Venice, we thought it only fitting to spotlight Italy in this issue of PETS International. On page 80, you can read about current developments in the Italian pet market, and you will find the most important industry statistics provided by Euromonitor International.



Corine van Winden, CEO



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December issue

A look into the fast-moving Chinese pet market.

China



New developments in the global litter market.

Litter

The latest about (functional) pet snacks and treats.

Snacks and treats



Upcoming issue | Advertising deadline: 27 October 2017 | Publication date: 24 November 2017

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

Pet industry highlights



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

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



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Correspondence may be edited for clarity or length.



Yantai China Pet Foods enters the capital market

On 21 August 2017, Yantai China Pet Foods Co., Ltd. initiated an IPO and listed A-shares on the Shenzhen Stock Exchange (SZSE). This was the first public offering by an SME in the Chinese pet industry. Established in 1998, Yantai China Pet Foods Co., Ltd. is one of the leading manufacturers of pet snacks in China, and owning ten subordinate factories with over 1,500 employees. The company is designed and built based on human consumption standards, and is managed strictly in accordance with the FDA standards. After the IPO, it will continue to provide society and customers with consistent, excellent performance.

Rebranding Premier Nutrition

PREMIER NUTRITION Premier Nutrition, the UK based premix manufacturer, unveiled its new logo and website to customers on 21 September. The rebranding reflects both the evolution of the company as well as its vision for the future.

Mars announces environmental sustainability plan

Mars has announced the launch of its new environmental sustainability program, which will include a \$1 billion (€837 million) investment in climate protection. The plan, labelled the 'Sustainable in a Generation' plan, will aim to tackle climate change, poverty in the value chain, and a scarcity of resources. Through the investment, Mars hopes to deliver on the Paris Accord and the UN Sustainable Development Goals by tackling a broken, extended supply chain system. Mars is not the only company making big investments in pet food sustainability. Canidae Pet Food launched Canidae Farm earlier in 2017 in an effort to use more ingredients that the company is directly and actively involved in growing.

New partnership for Gosbi Petfood SA

Gosbi Petfood SA is proud to announce the signing of the exclusive agreement with Betta Sp. z.o.o. for a strategic partnership in the Polish market. Betta has a long tradition and story in the pet care sector in Poland, mainly in aquatics and pet food. Since 2012, they have started a national distribution of their own pet care portfolio, becoming one of the leading organizations, with the goal to offer pet-shops and pet owners outstanding quality, unique products, and service.



Pet industry highlights



SureFlap changes name to Sure Petcare

SureFlap, the pet technology specialist, announced that it has changed its name to Sure Petcare. The move is part of a rebranding initiative to better align the company's name with its future strategy to expand its connected product range.



Just For Pets to go into administration

A pet shop chain with 25 stores across England will go into administration, its owners have announced.

Just for Pets, which runs the bulk of its shops in the Midlands, has been making a loss, owners Wynnstay said in a statement. Changes in buying behaviour, competition, and greater cost pressures are given as reasons for the company's demise.

Pets Corner closes a third of PamPurredPets stores

Pet chain Pets Corner has closed nearly twenty underperforming PamPurredPets stores since its multimillion-pound takeover last year. Pet Family, the parent company which operates the Pets Corner retail chain, bought PamPurredPets, which had fifty stores, for £6 million (€7 million – \$8 million) in March 2016. In the annual report at Companies House, Pet Family said it was satisfied with results and that profitability in the company "remains healthy" despite the current economic climate and growing competition in the market.

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Pet industry highlights



Tropical – forty years of experience

Tropical is one of the world's leading aquarium manufacturers with an exceptionally wide range of products and one of the most technologically advanced production lines, which can even produce the smallest granules of 0.5 mm. This year Tropical is celebrating its 40th anniversary.

Thanks to its long history, the brand is now highly trusted by demanding breeders, hobbyists, and trade experts. Its offer includes more than 1,000 stock keeping units and is enriched with 40 new products on average every year. Products are available in more than 75 countries all over the world.

Looking for... is the brand new online platform connecting pet industry players worldwide

Since 1992, the printed PETS International Buyers Guide has been one of the most important business tools for pet industry professionals. New times bring new opportunities, and at GlobalPETS, we can now further optimize the way we facilitate you and your business network. Therefore, as of 2018, we are replacing the Buyers Guide with Looking for...

We updated and upgraded our international community website and are proud to present this new global directory for the international pet industry. Looking for... is freely accessible, anytime and anywhere. The platform is multidevice friendly, thus greatly enlarging your audience and visibility. If you would like to know more, take a look at the our website, contact our office or your local agent.



Groundbreaking for Bühler Innovation Campus

Bühler celebrated the groundbreaking for the Innovation Campus in Uzwil, Switzerland, on 25 September. Completion of the building is expected for the first quarter of 2019.

The Bühler Innovation Campus brings together innovation, applied research and development.

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certified petfood
ingredients

The background of the page features a soft-focus photograph of autumn leaves in shades of orange, red, and yellow. A large white rectangular box is positioned on the right side, containing the main title and introductory text. The overall design is clean and professional, with a light gray curved graphic element on the right edge.

Ingredients and production

In modern production, raw materials testing is a well-established quality assurance tool, though some people still question the business benefits of raw materials testing. Read about raw materials testing, risk management, and quality assurance.

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EVERY STEP, ASSURED



From our team of scientists and application equipment engineers to industry-leading solutions for stability, food safety and palatability, what sets Kemin apart is our technical expertise and commitment to providing products and services that meet the needs of pet food manufacturers, renderers and ingredient suppliers. **Kemin is assurance.**



www.kemin.com/petfoodsafety

ASK US HOW TO ENSURE YOUR RAW MATERIAL QUALITY

Kemin Nutrisurance

Every step, assured

Kemin brings expertise to every step of the petfood ingredient manufacturing process to assure the quality and performance of their products.

Pet food and rendering industries

Kemin has been supplying ingredients for pet food since the 1960s. By the mid-1980s, pet food choices were becoming increasingly sophisticated and sales were increasing. This shift required the company to reposition its approach to match that of its customers.

As a result, Kemin Nutrisurance, the Pet Food and Rendering Technologies division of Kemin Industries, was officially established as a worldwide business unit in 2000. They have evolved to offer solutions throughout every step of the pet food supply chain for manufacturers, renderers and ingredient suppliers to address consumer needs in four key product categories: antioxidants, palatants, proteins and food safety.

Their vision is to offer a complete solutions portfolio, which links product and application expertise, to assist customers in creating safe and nutritious food for companion animals worldwide.

Ingredients and manufacturing excellence

Kemin understands how raw materials will ultimately impact finished products.



All the ingredient suppliers are evaluated on the ability to provide consistent, high-quality products. In addition, the Raw Material Risk Assessment Program is designed to identify product safety risks in all raw materials.

Quality means a promise to deliver safe and efficacious ingredients and products. Kemin fulfills this promise by incorporating quality into every aspect of business – raw material and suppliers, innovative product development, good manufacturing procedures – extending until the final product release.

Innovative products and technical services

This company is focused on identifying, creating and designing industry-leading products that meet safety, stability, palatability, ingredient and formulation needs of pet food manufacturers and renderers.

Its dedicated technical services staff leverages experience and advanced problem-solving skills to troubleshoot customer issues. They provide vital information regarding product performance, market trends, efficacy,

inclusion rates and manufacturing processes. Technical service managers are also prepared to provide training and education to customers.

Customer Laboratory Services

The CLS team provides dedicated analytical support for stability and palatability throughout all phases of the pet food manufacturing process. The ISO 17025 accredited labs achieve desired throughput and turnaround times as well as feature validated methods to meet and exceed customers' specifications and business goals.

Product Application Department

The team of highly qualified engineers and technical experts designs liquid and dry application systems and oversees system fabrication, installation and maintenance. Staff also provides training and consultation to ensure customer performance goals are met. ♦

♦ **Kemin Nutrisurance**
kemin.com/assurance



Raw materials testing

**Which lens do you view raw material testing through?
Is it an avoidable expense or a strategic management tool
for developing a sustainable business?**

A centuries old tool

Many people might associate the testing of raw materials with modern quality assurance tools. However, the concept dates to the Middle Ages when craftsmen's guilds tested the materials they used – for example in the making of leather shoes – to avoid waste and use of sub-standard materials. In modern industry, including the manufacture of pet food, raw materials testing is a well-established quality assurance tool that came to prominence throughout the 20th century.

Important for all manufactured products, including pet food, the aim is to minimize waste and reduce the frequency of making 'out of specification' products due to raw materials 'failure'. Not only is producing sub-standard products a waste of raw materials but it might also result in further cost (rework, scrap, recalls, etc.), and in customer complaints and damage to business brands.

Valuable business management tool

However, not all people see raw materials testing as a valuable quality and business management tool. How we see a raw material testing programme, depends on which lens we look at it through. For example:

- Regulatory perspective – Does the raw material meet regulatory requirements e.g. mycotoxins?
- Animal nutrition – Is the raw material digestible?
- Purchasing – Does the market price represent good value based on the raw material's protein content?
- Manufacturing – Does the raw material meet the viscosity specifications to minimize the risk of spillage at the pouch filler?
- Least cost formulation – Does the overall raw material composition allow reduction in usage of other ingredients?
- Business efficiency – Opportunity to reduce waste and improve raw materials utilization.



Despite the many benefits, some people still question the business benefits of raw materials testing.

- contributes to sustainable development, including health and the welfare of society,
- considers the expectations of stakeholders,
- follows applicable law and consistent with international norms of behaviour,
- and is integrated throughout the organization and implemented in its relations.”

Considering both definitions together, the aim is to encourage organizations to take a balanced view on economic, social and environmental issues that benefit all stakeholders, from raw materials supplier to consumer (pet owner).

This includes energy efficiency and resource optimization, e.g. water and raw materials. To ensure optimal raw materials usage (efficiency) and avoidance of waste, analytical test data enables decision making on efficient resource utilization and therefore contributes to CSR. Analytical data includes both beneficial characteristics, e.g. protein content and undesirable constituents e.g. mycotoxins.

Market research data, e.g. demographics / age of pet owners, help us shape our business beliefs on CSR. For example, market research from GfK indicates that millennials (aged between 18 and 34) are influenced by socially and environmentally aware companies and might make purchasing decisions on this basis. This data backs a previous study by Wakefield Research in 2014, who also found that millennials' buying decisions are influenced by companies with 'strong' social and environmental business ethics. They also have more spending power and own more pets.

Whilst these examples outline many of the business benefits that can be gained through raw materials testing, they fall short of highlighting its contribution towards developing a sustainable business.

This link is more evident when we consider the concept of Corporate Social Responsibility (CSR).

Corporate Social Responsibility

The International Standards Organisation (ISO) defines CSR as “a balanced approach for organizations to address economic, social and environmental issues in a way that aims to benefit people, communities and society.”

In addition, the ISO26000 standard defines CSR as “an organization’s responsibility for the impacts of its decisions and activities on society and the environment, through transparent and ethical behaviour that:

► SEE NEXT PAGE



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CSR and quality

In 2011, a white paper by the non-profit global sustainability network and consultancy BSR and the American Society of Quality, highlighted the strong linkage between CSR and quality. This provides a mechanism for developing a sustainable business based on CSR, quality management and business efficiency principles.

Models based on business excellence awards like the US Baldrige Quality Award and the European EFQM Global Excellence Award can be used to help facilitate development of a sustainable business. These use 'models' for business excellence that develop business ethics, values and culture based on these interlinked principles and philosophy.

Through different lenses

Despite the many benefits, some people still question the business benefits of raw materials testing. However, take a step back and consider

another factor: the costs of product withdrawal from the market, recall costs and the damage to the brand image due to raw material failure. The resulting brand image and brand equity damage can be significant and indeed the business might never recover from the impact of a major recall.

The lens you view raw materials testing through, helps define the business position on raw materials testing. Depending on how you view it, raw material testing can be seen as an avoidable cost or more constructively, as a valuable insurance policy or a resource for developing business sustainability. ♦



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Trust is good, control is better

As we all know, delivering quality starts at the source. To produce the best results, excellent ground materials are essential, but that is just the start. It is what happens next in the production and transport process that determines the quality of the end product.

Certifying raw materials

Anything can happen everywhere in the supply chain. The only way to guarantee quality from source to shelf is to closely monitor the entire product journey and actively invest in excellent working relations with suppliers and process partners.

Premium pet products require premium ingredients. Finding those ingredients is the easy part; the real challenge lies in maintaining their quality and integrity throughout the entire production chain.

To begin with, you need to be assured of the quality of the raw materials you are working with. A certificate of analysis from origin should therefore accompany all deliveries. And since trust is good but control is better, additional testing and random analysis are strongly recommended.

With product-group-specific HACCP risk analyses, it is possible to detect and eliminate undesirable substances up front and make sure all test results comply with the strictest rules and legislation.

Ingredients and production

Conducting double checks on arrival is essential to determine the quality of ground materials from the start.

Thorough testing

Conducting double checks on arrival is essential to determine the quality of ground materials from the start. But more importantly, thorough testing offers customers much-needed assurance. As product rancidity is one of their greatest concerns for animal proteins, the first test is a peroxide value (PV) analysis. Additional testing to measure moisture, fat, ash and protein percentages as well as chemical analyses helps to determine the product characteristics in detail.

The idea behind extensive testing and analysis – whether performed regularly, randomly or at the customer's request – is to guarantee product quality and, if possible, to take it to a higher level. Only by sharing the test results and talking through all the details with raw material producers, is it possible to both secure and strengthen a competitive advantage.

Basis for further improvement

Quality control is not optional. To begin with, European and US law obliges food processing companies to conduct regular checks and yearly assessments. But even without regulation, companies have a vested interest in controlling the quality of their production processes and safeguarding the integrity of their supply partners. An annual quality evaluation, in which supplier performance, HACCP monitoring and sample plan results are reviewed, is critical to long-term success.

The outcome of the evaluation together with market alerts (RASFF) and insights into the product's history creates a solid basis for further improvement. If you know precisely what is failing, or if you can pinpoint the source of any undesirable substances, you can take specific action and work towards a better end result.

Sharing findings and insights

At IQI, testing is in our DNA. We go to great lengths to guarantee the quality of our premium pet food ingredients, meticulously monitoring all stages in our supply chains. Although all our efforts are summed up in the IQI Quality Passport – a product-specific document that offers unrestricted insight into the production and transportation process – we have not yet mentioned our most important practice.



As a trader, we rely on our producers to provide us with premium ground products. Our business is all about collaboration, which is why maintaining excellent working relations is vital to our success. By sharing our findings and insights with the people at the source, we provide them with information that could help them improve their products. And that means we can improve ours. The more quality you put in, the more quality you get out. ♦



Ir Sven Gravendeel
President of IQI Certified Petfood Ingredients
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IQI-petfood.com



Predicting the digestibility of pet food

A modern approach to testing the digestibility of pet food, avoiding the need for live animals.

Variations in digestibility

Nutrient composition and digestibility are of crucial importance for the qualitative evaluation of pet food. The pet food industry traditionally uses a wide range of protein sources, both of animal and vegetable origin, including meat, bone and soybean meals, which vary considerably in terms of their digestibility. Obviously, variations in the digestibility of ingredients directly affect the availability of nutrients.

Unfortunately, while the quantity of main nutrients must be stated on the label, information about the digestibility of pet food is rarely included, as it is not requested by current legislation.

Measuring digestibility

In the past, the digestibility of dog food has been evaluated using kennel dogs or, in some cases, fistulated animals.

Nowadays, for obvious ethical reasons, the use of fistulated animals is no longer acceptable. However, digestibility trials with kennel dogs are expensive and time-consuming, even if they do not involve any invasive procedure or suffering and stress for the animals. For these reasons, the pet food industry would benefit from the availability of a reliable in vitro method to estimate the digestibility of pet foods.

A new method

At the Department of Veterinary Medical Sciences in Bologna, Italy, we have developed a relatively simple procedure for predicting the digestibility of commercial diets for dogs. The method consists of two main phases that simulate the digestion processes taking place in the stomach and small intestine of dogs.



Briefly, the pet food sample is dried at 65°C and then incubated in a shaking water bath at 39°C for 2 hours in the presence of hydrochloric acid, pepsin and gastric lipase to simulate gastric digestion. Then, in order to simulate the digestion process that occurs in the small intestine, a solution containing pancreatic enzymes and bile salts is added to the sample which is incubated for another 4 hours at 39°C. Finally, the undigested fraction of the food sample is collected by centrifugation, dried and weighed to determine dry matter digestibility.

Moreover, both the pet food and its undigested residue are analysed to determine crude protein, ether extract, ash and starch in order to estimate the digestibility of these nutrients. The whole in vitro procedure has been accurately described in Biagi et al. (2016, Italian Journal of Animal Science).

Validation

In order to validate the new in vitro method, the digestibility of sixteen dry extruded commercial diets for adult dogs was evaluated both in vitro and in vivo with kennel dogs. The results obtained showed a very good correlation between in vitro and in vivo digestibility of dry matter and the method proved to be very reliable in predicting the digestibility of fat and starch. Correlation between in vivo and in vitro digestibility of protein was not very accurate but this result was expected because faeces contain not only protein of dietary origin, but also bacteria and other endogenous protein sources (mainly sloughed-off intestinal cells and digestive enzymes), leading to an underestimation of protein digestibility from trials with dogs.

Simple and quick procedure

In conclusion, the in vitro method that has been developed proved to be a simple and quick procedure for predicting the digestibility of commercial diets for dogs. Moreover, despite the fact that validation of the method was conducted only with dry extruded commercial diets for dogs, the present method may also be used to estimate the digestibility of wet food for dogs, cat food, and raw materials. The utilization of such a method may significantly reduce the need for in vivo digestion trials with dogs and cats. ♦



Giacomo Biagi

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Improving quality and food safety

Ensuring the quality and safety of pet foods is a complex process. Issues that pet food manufacturers may encounter include oxidative deterioration and microbial contamination.

Quality risks

Failure to control oxidation can result in loss of nutritional quality and reduction in palatability of pet food. Autoxidation can be effectively managed through proper use of antioxidants in ingredients and throughout the production process. Microbial hazards can result in quality degradation of raw materials and can be considered a pet food safety issue due to the risk of direct human contact.

However, effectively managing both rendering raw materials and fresh and frozen meats utilized in pet products are potential opportunities to improve the quality and safety of pet foods.

Raw material risk management

Protecting the quality of the raw materials can assist in improving operational efficiency in rendering facilities and supports pet food producers' quality requirements. However, delays in processing raw materials can have consequences on both the oxidative and microbial quality of rendered fat and protein. Microbial decay can potentially result in an increased production of free fatty acids and biogenic amines in addition to lipid oxidation.

ALLINSUR™ FS is a highly effective blend of antioxidants and acidifiers utilized for maintaining the quality of rendering raw materials. It aids in prolonging the freshness by controlling oxidation and microbial degradation.

Getting the most out of meat based ingredients

Meat ingredients that have deteriorated can create several unintended quality risks including microbial degradation, as meat can be associated with elevated levels of both pathogenic and nonpathogenic microorganisms. This can lead to increased levels of biogenic amines, free fatty acids and also result in a negative impact on palatability.

ALLINSUR™ M-TC Dry was developed to provide petfood manufacturers and meat ingredient suppliers with an innovative, natural solution to effectively manage the risks associated with fresh and frozen meats. It extends the freshness and quality of these materials by influencing biogenic amine formation, caused by microbial degradation and protecting against oxidative deterioration.

Protecting the investment

By partnering with customers to analyze the quality of their supply chains, we can understand the influences that various petfood ingredients have on the stability and palatability of the final product, keeping it safe, fresh and nutritious. ♦



Jim Mann
Antioxidant Product Manager
Kemin Nutrisurance
kemin.com/assurance



At IQI we stop at nothing to serve the finest quality. Take our latest innovation: Chicken Premium Meat Powder. We set up a complete new production process to deliver chicken at it's best.

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Dinnissen THE NETHERLANDS
Continued global expansion for Dinnissen

Dinnissen recently opened an office in Indonesia. Perry Konings, Commercial Manager said: "With the opening of our Asian office, we are taking an important step towards further internationalization. While on our current sales path, we realized that if we want to better serve the Asian market, we need to open an office in Asia." Dinnissen expects to be able to address specific questions from the market with the opening of this local office.

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The application and testing of antioxidants in pet food

In order to preserve palatability, pet food producers should pay attention to controlling the lipid oxidation of fats to ensure the shelf life of pet food and susceptible ingredients.

What is lipid oxidation?

Feed can become rancid as the fats in the products undergo chemical as well as physical changes. Lipid oxidation is a common undesirable chain reaction consisting of three main phases: initiation, propagation and termination. During this oxidation process, unsaturated fatty acids are slowly oxidized. As a result, a series of breakdown products are produced, which can lead to a typical rancid flavour with less palatability.

What are antioxidants?

In order to extend the shelf life of pet food and ingredients, it is useful to add antioxidants to susceptible materials. Antioxidants are classified as feed additives (European Union Register of Feed Additives, Annex I of Regulation (EC) No. 1831/2003) and defined as substances that delay the oxidative degradation processes of feedstuffs and thus improve oxidative stability.

In pet food, these primarily include propyl gallate, butylated hydroxyanisole (BHA), butylated hydroxytoluene (BHT) and ascorbyl palmitate as synthetic antioxidants, as well as tocopherol-rich extracts of natural origin as natural antioxidants. Plant extracts like rosemary are not approved as antioxidants, even though they partly display antioxidative effects.

Moreover, chelators such as citric or phosphoric acid are added to bind positively-charged ions of transition metals and thus delay the spoilage process.

Causes of oxidative rancidity

The oxidative stability of fats is affected by several factors. Light, temperature, presence of transition metals and the oxygen in the air, as well as fatty acid composition, can increase the rate of lipid oxidation. For example, fats become more sensitive to oxidation as the level of unsaturation and the length of the fatty acid chain increase.

Measuring lipid oxidation

Selecting the optimum test is difficult due to the complexity of the lipid oxidation process. A variety of methods are available to measure the quality of fats and feed, e.g. oxidative stability tests or determination of primary (peroxides) and secondary oxidation products (aldehydes and other volatiles). It is generally difficult to predict the stability of fats or feed by using only one test, so method selection and data interpretation require careful cooperation between the laboratory and the pet food/fat producer. ♦



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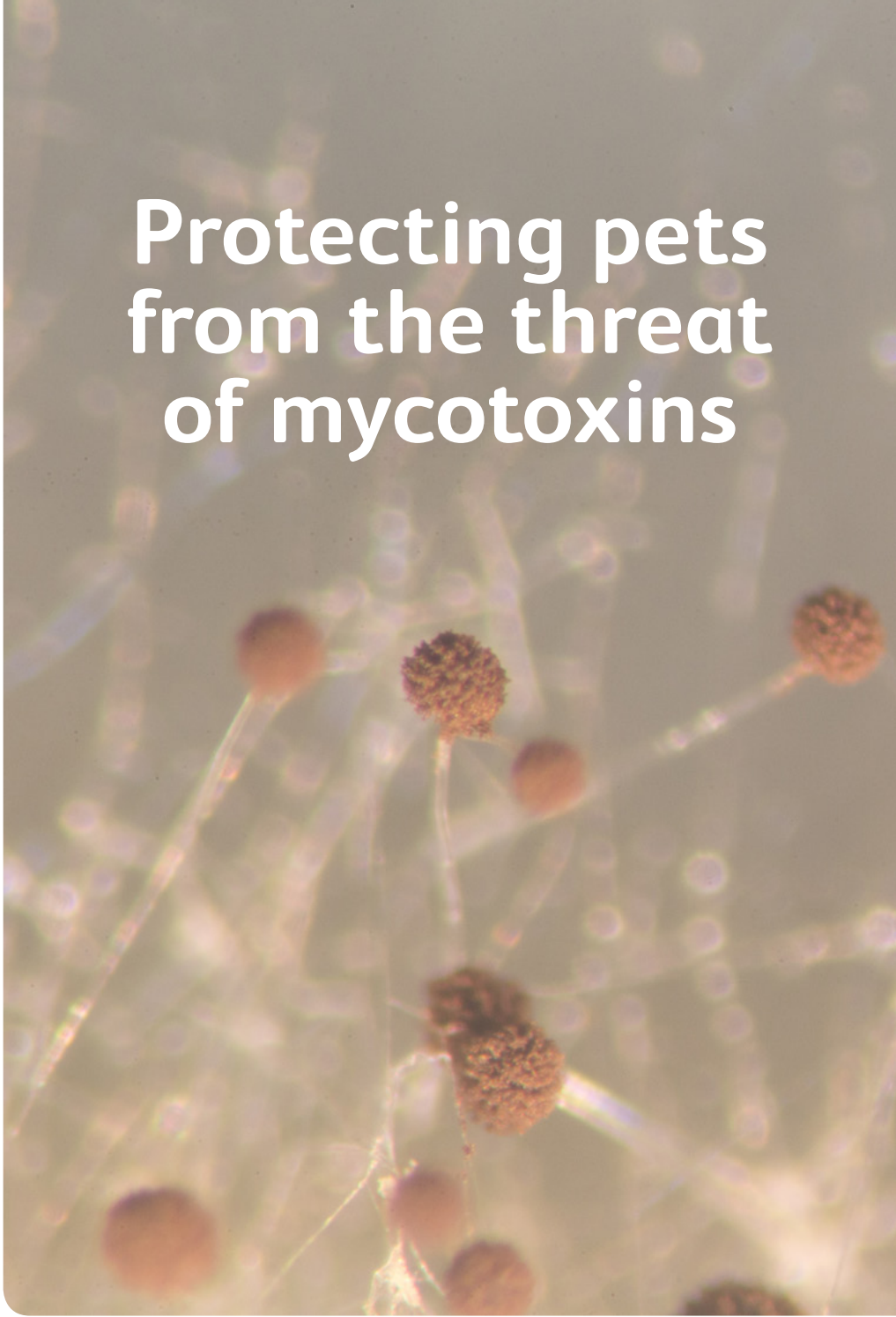


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Protecting pets from the threat of mycotoxins



Pet food companies worldwide are constantly working towards improving and maximising the quality of their product. Due to the risk mycotoxins pose for animal health and with the increasing prevalence of mycotoxins globally, the focus is on pet food companies to meet EU and FDA regulations and maximise the quality of their product.

Ingredients and production

What are mycotoxins?

Mycotoxins are naturally occurring metabolites that are produced by certain moulds, possessing the ability to develop and grow on a variety of crops they can affect large amounts of feed and increasingly, pet food. If a sample tests positive even for low levels of contamination the toxins are still strong enough to cause illness in animals, and if low levels are consumed over a long period of time this can result in chronic illnesses including; cancer, organ damage and neurological disorders.

The main mycotoxins of concern in pet food are;

- Deoxynivalenol (DON)
- Fumonisin (FUM)
- Zearalenone (ZEN)
- Aflatoxins
- Ochratoxin
- T-2 Toxin

Contamination can occur in any country around the world and at any stage of production. To tackle the issue head on and work towards a mycotoxin free product is the joint responsibility of feed producers, supply chain partners and quality control laboratories ensuring the complete safety of the product.

Symptoms of ingesting mycotoxins

In terms of animal health, mycotoxins can cause a variety of problems. Severity and symptoms can vary from animal to animal but general symptoms include; hyperactivity, vomiting, high temperature and loss of coordination. If ingestion is suspected a pet has to be taken to the vet for immediate treatment.

The EU currently regulates all the mycotoxins listed above and they are subject to a maximum or recommended residue limits. In the US, FDA regulations are limited to aflatoxins, DON and fumonisins (see the table for FDA regulations). If mycotoxin levels in feed fail to meet FDA standards,

Pets	Mycotoxin	Commodity	Level
Immature Animals	Aflatoxins	Corn/peanut/other ingredients	20 ppb
Adult Pets	Aflatoxins	Corn/peanut/cottonseed meal/other ingredients	20 ppb
	DON	Grain/grain byproducts, not to exceed 40% of diet	5 ppm
	Fumonisin	Corn/corn byproducts, not to exceed 50% of the diet	10 ppm

mass amounts of feed have to be destroyed as grain producers are prohibited from mixing contaminated feed with clean feed to reduce the mycotoxin levels.

Tackling the problem

Safe, reliable screening solutions for different variations of mycotoxins are available, ensuring only mycotoxin free feed is produced. Radox Food Diagnostics has created mycotoxin screening platforms as a response to increased levels of mycotoxins being found in feed globally. The platforms use patented Biochip Array Technology (BAT) so pet food producers can test for multiple toxins from a single sample. Radox Food Diagnostics has a range of mycotoxin Biochip Arrays available with customised arrays available to suit the specific screening needs of certain producers. Each Biochip format uses a straightforward extraction process with a 50µl sample of feed. Available tests include; Fumonisin, Ochratoxin A, Aflatoxin G1/G2, Aflatoxin B1, Paxiline, Ergot Alkaloids, Diacetoxyscirpenol, Deoxynivalenol, T2 Toxin and Zearalenone. ♦



Sinead Breen
Marketing Executive,
Radox Food Diagnostics
radoxfood.com

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The right palatant can make a world of difference... wagging tails, licking whiskers, and happy pet parents. In the competitive world of pet food, knowing how to get the most from your palatant solution means a repeat pet food sale. Partner with our experts to ask the questions that deliver the best formulation to meet your needs. AFB can help you take control of your success with palatant recommendations, application support, technical expertise and more. Learn more at [PalatantsPlus.com](https://www.PalatantsPlus.com).



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Palatability represents a small portion of the overall ingredient spend in pet food, but its value exceeds the spend.

Pets' preference

Imagine you have bought a new bag of dog food. Your son feeds the dog at mealtime. He calls out, "I think the dog is sick; she will not eat her food." Your normally enthusiastic canine eater is barely interested in her kibble. She seems fine, but you wonder about the new food.

The next day, the same thing happens. You return to the store to buy your regular brand of dog food. You throw away the unwanted food, and life returns to normal.

The need to understand palatability

This scenario is alarming for pet food professionals. A huge investment in nutrition, quality, food safety, and branding was made. The outcome? Failed palatability. And the investment, at least in this case, was for naught.

If palatability is not acceptable, the pet will avoid eating under the watchful eye of the pet parent. Palatability helps pet food companies accomplish the critical success factor of the repeat sale, and that is why it is critical to understand palatability.

Palatability companies will happily spend time with pet food professionals, educating them about palatability options and considerations. Fortunately, an e-learning option has become available via GlobalPETS Academy. The module, entitled "Principles of Palatability," is designed to

help pet food professionals quickly learn about pet food palatability. After completing this course, you will know how to define palatability, the purpose of palatants and how to measure palatability. Qualifying pet food professionals may be eligible to take the course at no cost by contacting your AFB International Sales Representative or by contacting the AFB International office in your region.

A worthwhile investment

The investment in understanding pet food palatability pays off in the end. Pets happily consume nutritious, high-quality foods; pet parents feel good about their investment, and pet food companies successfully introduce diets that benefit two- and four-legged customers.

Take some time to invest in the continuing education of yourself and your team members. Call your palatability provider to ask for in-person palatability education, or visit GlobalPETS Academy at globalpets.academy to complete the new course. Together, we will ensure that the investments made in pet food nutrition, quality, food safety and technology bring as much value as possible to the pets and pet parents we serve. ♦



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Wanpy®

Natural pet food

Although there is still controversy surrounding the topic of raw pet food, it has become a category in itself, alongside dry and wet pet food. The increase in raw pet food sales offers several opportunities not to be ignored.

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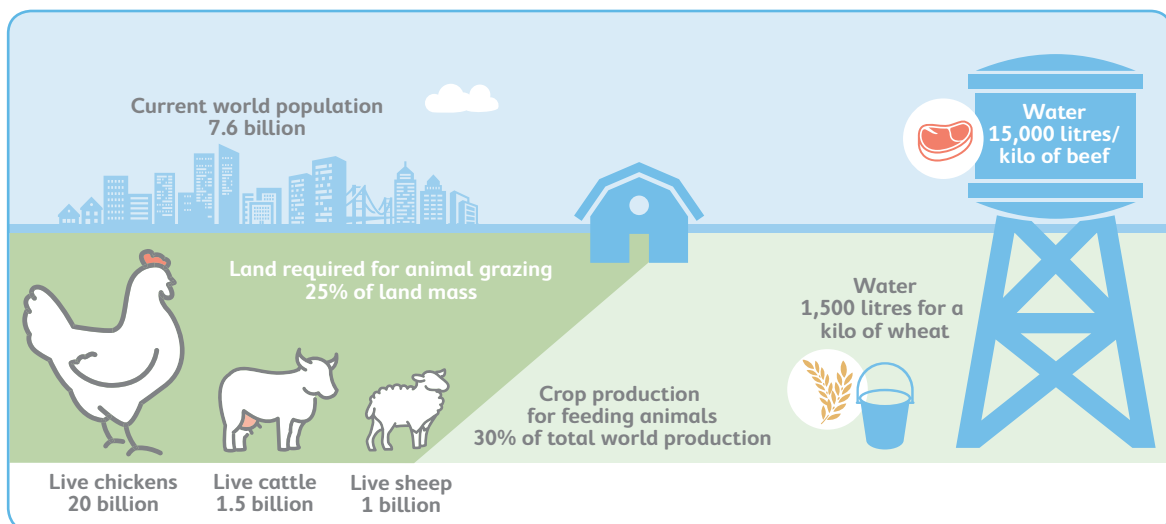
Future food for thought

The world will have 10 billion inhabitants by 2050. The natural question is how do we sustainably feed ourselves and our pets?

What is natural?

In 2016, I wrote an article reflecting future thoughts on natural, fruit and organic pet food. One section of the article reflected on the difficult definition of natural. The American Food and Drug Administration consulted with the public and industry in 2016 to produce a suitable definition of natural for food labelling purposes. The definition has remained the same.

However, the demand for food will continue to grow as it is expected the world population of humans will increase to just under 10 billion by 2050. This expected population increase will give rise to a higher demand for protein (especially meat and fish) as people grow richer. By 2027, beef consumption in Asia will increase by 44%. The Food and Agriculture Organisation (FAO) has claimed that 70% more food will be needed in 2050 compared to 2009.





Nurturing the future

The question is how do we sustainably feed ourselves and our pets? Change our diet? Change the diet of our livestock? Seek novel and alternative food from what we are used to?

An example of changing the diet of livestock is salmon feed. In 1990, about 90% of the feed for farmed salmon in Norway consisted of fish meal, by 2013 fish meal usage had dropped to 30%. Plant material has replaced fish meal. Another example is to ferment waste materials to produce methane gas. The methane gas is used to feed bacteria which can be turned into protein pellets for livestock and fish.

Hydroponic opportunities

In the future, rather than have food produced from 'land,' it should be expected food will also be produced in the laboratory or from soil less fields. Money is being invested by private individuals e.g. Bill Gates and large companies e.g. Tyson in technology to create protein from growing animal cells. Growing plants using hydroponics has moved to large scale production. Old buildings, such as redundant aircraft hangers are finding use as soil less fields and in the UK underground tunnels are suitable for vegetable growth using hydroponics. Will we see new buildings with underground cellars for production of food?

Will the products grown by hydroponic cultivation be labelled as natural? The vegetables will have come from the same seed family as soil grown products but will be grown under highly regulated environmental conditions i.e. artificial light, controlled atmospheres and temperature. I am sure some will say these products are not natural and if used as ingredients in other products labelling maybe a problem.

Product labelling

To date, no meat products grown from cultures have reached the market place. However, legislators know they will need to address how these products are to be labelled. A common approach when proving the safety of new products is to show they are the same as those already on the market. This method is already used by companies who produce enzymes for food processing. The enzymes are usually extracted from micro-organisms which are already in use in the food system and hence safe.

Regulations for meat products are based upon food from a slaughtered animal. Cultivation of cells to produce meat do not follow this requirement; not meat, not a food additive but a food. In some countries, the legislative chain for any product which ends in the food chain is clear, for other countries it may not be so clear as to who is responsible.

A definition of complex nature

It could be expect in the future the definition of natural to become more complicated. On the other hand, it could become simpler as products for the future will give rise to debate. ♦



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Capturing the potential of raw pet food

The increase in raw pet food sales offers several opportunities not to be ignored.

New category

Although it has been around since the 1970s, raw pet food is coming of age. Growing at 33% year-on-year for the past five years in the US (see graph) and at similar rates across Europe, it has become a category in itself, alongside dry and wet pet food.

According to various estimates, it now accounts for roughly 10% of the pet food market in Finland, 5% in Germany, around 3% in the UK, and nearly 2% in the US. Both in Germany and in the US, the market size of raw frozen / refrigerated pet food has surpassed €100 million (\$120 million). In the UK, there are over fifty producers of raw pet food, and thirty in the Scandinavian countries. The largest producers process over 1,000 tonnes a month.

Growth drivers

The drivers for this growth are clear. With the humanization of pets has come an increased interest in what consumers offer them to eat. As consumers spend more time investigating what they eat, they do the same when it comes to pet food.

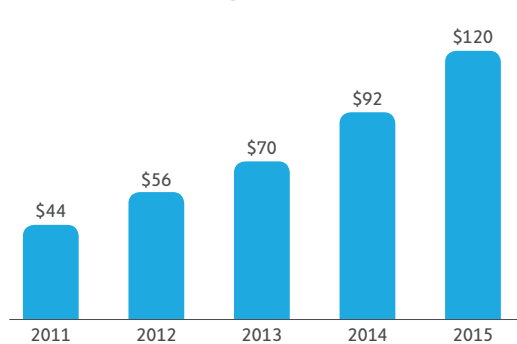
What is more, raw pet food offers an answer for those consumers who view the traditional dry kibble with suspicion. Given the inherent lack of processing in raw pet food, it provides consumers with a 'what-you-see-is-what-you-get' product, and thereby a much-wanted alternative to home cooking.

Finally, raw pet food benefits from the back-to-nature movement. It not only allows people to



Natural pet food

Raw frozen/refrig. in US - \$ sales in million



 **+33%** sales growth year-on-year

 **63%** distribution (up from 40% in 2011)

 **\$1,400** per store/month; 86 more than 2011

 **23 SKUs** per shop vs. 14 in 2011

Source: GfK data

give their pets the same food as was eaten by the ancestors of the modern-day dog and cat (the wolf and the wild cat, respectively), but it also nicely fits in with the 'natural' claim, that many pet-food-related products now wish to subscribe to.

Opportunities

This increase in raw pet food sales offers several opportunities that are not to be ignored. First of all, given the fact that raw pet food does not lend itself to big volume purchases, it has the potential to double the frequency of stores visits, which at best is once a month for loyal customers.

It also offers good protection against online sales, as the logistics involved in sending frozen parcels are far more expensive than those of sending dry.

Finally, as frozen has yet to enter supermarket shelves in most markets, it presents specialty retail with a unique opportunity to claw back some of the lost wet pet food market share.

Three steps for specialty retail

In order to capture the opportunity ahead, there are three steps for specialty retail to take:

1. Create a separate category

It is vital for specialty retail to treat raw pet food as a separate category by setting up a dedicated space for frozen products, and investing in branded

freezers to catch the customer's attention. Leading specialty retailers that have doubled freezer capacity have seen sales of raw pet food double one year later and triple the year afterwards. Some specialty retailers have even gone further, investing in BARF-islands where customers can find various products associated with raw pet food including oils, minerals, dried rice and books.

2. Offer consumers choice

As consumer tastes differ, retailers should make sure they offer a complete range of trustworthy brands, ranging from value-for-money to super premium, and offering a mix of branded and private label products.

3. Train and support staff

Providing pet food advice to the savvy, internet-educated consumer requires sales staff to ramp up their knowledge of raw pet food. Retailers should acknowledge this and provide staff with all the tools they need.

Eventually, to capture the potential, it all boils down to overcoming the resistance to change that is inevitably linked to entering a new market. Only those who act in a decisive yet careful way will succeed. ♦



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The controversy of raw

In the 1990s, several pet food companies started to market raw foods for pets, claiming they were fundamentally better for pets and led to shinier coats, healthier skin, cleaner teeth, higher energy and smaller stools.

Introducing BARF

These brands hypothesized, that these foods were not alternatives but were evolutionary models of how nutrition should be for all domesticated pets. They further hypothesized that only meat-based foods were good for pets and any feed with grains were going to lead to health problems for pets. These introductions were quickly met with much concern, disbelief and disdain by many in the industry. This new niche of pet food needed a name and BARF, an acronym for Bone And Raw Food or Biologically Appropriate Raw Food, was quickly coined and communicated widely.

Know your process

I have often said, in pet nutrition training sessions all over the world, that the form of the delivery of nutrition is not the issue – it is the content and the bioavailability of nutrients, the balance of nutrients and the fortification of nutrients necessary for that particular food design. All of these are keys to good health and long-term performance.

Good nutrition is about knowing your process and delivery of nutrients with good shelf-life to adequate consumption.

Good nutrition is about knowing your process and delivery of nutrients with good shelf-life to adequate consumption.

Certainly, dogs like meat, poultry and fish and corresponding flavours, but that should not draw the firm conclusion that only meat in its raw form is the healthiest. Nor should it draw the dogmatic conclusion that dogs are carnivores. Every veterinary school and basic physiology course teaches that dogs are omnivores requiring lower protein levels than true carnivores like cats. Dogs also like sweet products and have a high capacity to digest large quantities of starch. These facts are widely published in peer-reviewed journals.

The 'Raw Food Is Best' conclusion

Where do these well-known facts fit into a 'Raw Food Is Best' conclusion or RFIB? The conclusions drawn suggest perceived benefits with many dogmatic positive claims without substantiation. I am not suggesting that the RFIB hypothesis of superiority is wrong. Rather, I am pushing back that it needs real scientific evidence without internal bias. As it is today, RFIB is speculative and based on repetitive claims. Let me explain.

Often, a consumer's perceptions quickly become their reality. The more you hear something, the more it begins sounding true even though there is no scientific evidence. But just because you believe something is a certain way does not make it so. It is an unproven hypothesis or theory. We have seen this come true in the demonization of many ingredients and well-accepted nutritional principles. An example of this is 'cheap ingredients contain fillers and add calories'. Other examples are the demonization of Vitamin K, potatoes and rosemary extract.

RFIB marketing adamantly suggests that any cooking or high-pressure processing destroys vital enzymes and vitamins in ingredients. Any time you touch, store, transport or grind an ingredient, there will be an impact. Processing easily has an impact on

heat-sensitive, light-sensitive and pressure-sensitive nutrients. The question is 'how much impact?'

RFIB dependencies

The further assumption of RFIB is that animals are dependent upon enzymes in food to reach the best nutritional digestion. Clearly, additional enzymes have been useful with farm animals to aid phosphorus digestion, but digestive enzymes abound in the intestinal tract, produced by the host.

RFIB marketing further focuses on protein levels with the belief that dogs are carnivores and further attacks ingredients not used in their foods as 'cheap'. Preservatives are said to deplete micronutrients. For decades, we have known the opposite is true as antioxidants help reduce the destruction of fatty acids and vitamins.

Another flaw in RFIB is the delivery of nutritional content. RFIB food producers have realized that their own blends cannot provide all the essential nutrients necessary for optimum health. Which suggests that wild animals eating raw cannot balance their own nutritional needs for their long-term health.

Salmonella and Listeria in raw food

In a two-year study, the FDA tested and reviewed many pet food types – raw, jerky, semi-moist and dry. Salmonella was found in 15 of 196 samples of raw food whereas Listeria was found in 32 of 196 samples. No Salmonella or Listeria was found in any jerky samples (196), soft-moist dog foods (120), soft-moist cat foods (120), dry dog foods (120) or dry cat foods (120).

► SEE NEXT PAGE

A healthy balance

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A big concern of the FDA was people getting Salmonellosis or Listeriosis from contaminated food. People with poor intestinal health, open wounds or those who are immune-compromised are especially vulnerable. Greater care should be taken in delivery, storage and handling. Since many raw pet foods suggest they are designed for convenience, these warnings seem contradictory.

Where does this leave us?

We should always feel free to develop and test any hypothesis we might have from evidence. We need to build new thought and new ways of doing things. If there are better or alternative ways to deliver good nutrition, we should all be open to them. A good hypothesis must be tested, retested and pushed to a conclusion where multiple views are seen.

When the pet food world realized they were not providing enough taurine for cat foods, the movement was swift to fix the problem. Alternative product niches (premium, super-premium, holistic, organic, etc.) were developed and accepted.

The controversy with raw foods is that so little science has been offered. As a long-term member of this community, I throw down the challenge – do the research and have it peer-reviewed. Make the products safe for handling and use. Eliminate the concerns and then enjoy an alternative pathway to good nutrition – not a better one. ♦



Dr George Collings
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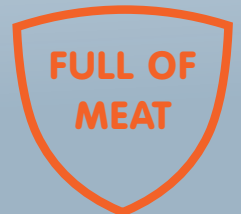


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Advertorials

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To produce our pet food, we use only fresh fruit and vegetables, which are prepared at our plant and directly forwarded to the production process. Animals deserve all the best, so Dolina Noteci conducts audits of the suppliers to make sure that only strictly controlled ingredients are used to produce pet food. Our company is crystal clear for the customers and has opened its door to enable them to visit the plant and see that pet food from Dolina Noteci is world-class.

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Just real meat and bones



MUSH is the leading company in the BARF (Biologically Appropriate Raw Food) segment in the Nordic countries. It believes that every dog deserves food that is made of pure, fresh, raw materials.

Development

MUSH was founded in 2004 by Stig Snellman, who is part of the Snellman family, owners of the third largest slaughterhouse group in Finland. During its first years, the company operated only on the domestic market with sales mainly to large-scale consumers in the sled dog community.

In 2013, they invested in a new production line for frozen meatballs, and launched their new BARF meals called Vaisto. In 2017, the company is expected to achieve a turnover of approximately €9 million.

Raw food

The Vaisto products were developed in close collaboration with dog owners, dog experts, and researchers. Every meal contains a balanced amount of raw meat,

bones, organs and vegetables. All the meals include meat from three different animals, to ensure a good variety of different proteins and amino acids. MUSH has worked with Helsinki University to support research into BARF feeding and it is also co-operating with vets on the risk management of raw feeding.

Global expansion

MUSH started to operate on the international market in 2013 by launching its products in Sweden, and in 2014 the company made distributor agreements for Denmark and Norway. It also opened a warehouse in Hamburg, Germany.

However, the market entry in Europe has been tougher than expected and still more than 90% of the turnover comes from the Nordic market. The company

is looking to its colleagues in the raw segment to help it grow in the European market. "We expect to see continuing growth in the whole frozen category with strong domestic brands on the large markets in Germany, France and Spain," says CEO Magnus Pettersson. "We need this to set up a more effective frozen logistics chain for deliveries and freezer sales in pet stores. This infrastructure will help us as ours is a premium product."

Brand ambassadors

MUSH is working with modern marketing strategies. These include various social media platforms where it is using brand ambassadors to help the company to build a brand community. ♦

♦ **Oy MUSH Ltd**
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A major player enters the capital market



On 21 August 2017, Yantai China Pet Foods Co., Ltd. initiated an IPO and listed A-shares on the Shenzhen Stock Exchange (SZSE). This was the first public offering by an SME in the Chinese pet industry.

Dreams and persistence pay off

Yantai China Pet Foods Co., Ltd. was the first company to introduce 'Dry Chicken Jerky' into China, starting a whole new industry with meat jerky pet snacks.

The company now has ten modern factories and nine subsidiaries throughout the world. It produces eleven series and over 1,000 varieties, including dry pet food, wet pet food, pet snacks, dog biscuits, dental snacks, and cat litter. It has the biggest, most complete product range in the Chinese pet food industry, and its activities cover all aspects of production, sales, and R&D.

Yantai China Pet Foods' products have been exported to more than fifty countries on five continents. The company has set up sales networks in over a hundred cities with online and offline channels, and has built an internationally known family of pet foods, with Wanpy as its main brand.

Inventing and developing

Yantai China Pet Foods has 69 product patents covering inventions, utility models and design, making it a truly global leader in manufacturing pet treats. The company's mottos are: 'focus on quality life for global pets'; 'global share, same quality'; and 'same line, same standard, same quality'.

With nearly twenty years of development, they work strictly in accordance with international standards. It is registered with the FDA and EU as an exporter of pet food, and has passed the governmental audits of DAFF (Department of Agriculture, Fisheries and Forestry) in Australia, the CFIA (The Canadian Food Inspection Agency) in Canada and the MAFF (Ministry of Agriculture, Forestry and Fisheries) in Japan. They have also passed the audits of BRC, Intertek, BSCI and MSC. Additionally, it has been certified under ISO22000, ISO9001, ISO14001, the HACCP Food Safety System, and the SGS North America

Supplier Qualification Audit (SQA). The company has built a good reputation and receives many compliments from its customers.

Striving for advancement

Entering the capital market is recognition for the achievements of Yantai China Pet Foods. After the IPO, it will continue to provide society and customers with consistent, excellent performance.

The road ahead is long and arduous; not to advance is to drop back. The company will continue to strive for high-quality products, improved R&D, meeting consumer needs, extending its sales network, and bringing health to the world's pets. Yantai China Pet Foods is concentrating on building an international enterprise at the top of the global pet food industry, and on contributing further to its healthy development. ♦

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Marketing

What does effective marketing communications look like in today's world? Traditional marketing focuses on 'sending' your message to a target audience. In social media marketing, it works exactly the opposite way: you listen carefully to a broad audience and respond to topics as they come along.

Effective marketing communications	52
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Effective marketing communications



You do not have to have billions to create great marketing, but clarity is key. Always remember: KISSing is good for you!

Keep it simple stupid

“Keep it simple stupid”, is a phrase that sticks in mind from my postgraduate training at Kimberly-Clark and CIM (Chartered Institute of Marketing). It was a real ‘a-ha’ moment when a colleague who had been to Cambridge University and graduated with an honours degree, was told to work with me to help her rewrite her marketing plan as no-one understood what she had written, but did not wish to offend her.

Spend time with your customers

In twenty years of working on major international brands, I learned that the essence is to get out of your ivory tower (especially if you are senior management/very fortunate to be highly educated), and truly spend time with your actual consumers. Who are they? What do they do? And most importantly, what language do they use?

In my early years of training to be a researcher at KC, I had one rainy day spent in a grim London suburb recruiting for a global brand tracker that I was in charge of running.

After standing in a recruiter’s shoes, I have more understanding for this job to get great respondents so the client can join the dots to create great insight and then overlay with commercial experience to determine the best strategic plan for that brand.

On this particular day, I had another eureka moment where one of the statements was ‘Is Brand X, a brand that you would see as innovative?’ 99% of people had asked what innovative meant. I had to say, “new and different.” They responded, “ah, so why didn’t you say that?” Indeed, why not? The reason was that the Eton and Oxbridge educated colleagues studied Greek and Latin and knew exactly what that meant, and would see it as uneducated to use basic English. However, the point is that their consumers and shoppers did use this language.

I then championed a global consumer programme which ever the CEO joined in on to promote clear language in order to turn round the brand which was seen as stand offish and unattainable. Once more, clarity is key.

Marketing

Keep things short and simple

Shoppers only remember eight words when they are shopping even though they see thousands on an average shopping trip.

Be relevant

What mission is someone on as a customer looking for a microwave meal would want something totally different to someone buying a treat for their pet.

Leverage emotion

People buy subconsciously and emotionally, so it is vital to tap into this.

Be sensorial

Linked to emotions, again there are many case studies where sense is used to trigger positive associations. For example, this is why bread in Europe is often put at the back of a store to entice you to weave through the aisles (and hopefully purchase as many other products as possible).

Be visual

People respond more positively, quickly and emotionally to images. Pack test research tracking retina movement for a diaper brand, shows that

the first element people lock eyes on, is the image of the baby. As a result of this finding, supermarkets now ensure that the header boards and other signage were as visual as possible to help shoppers easily locate the appropriate stage of development and brand that their child was at.

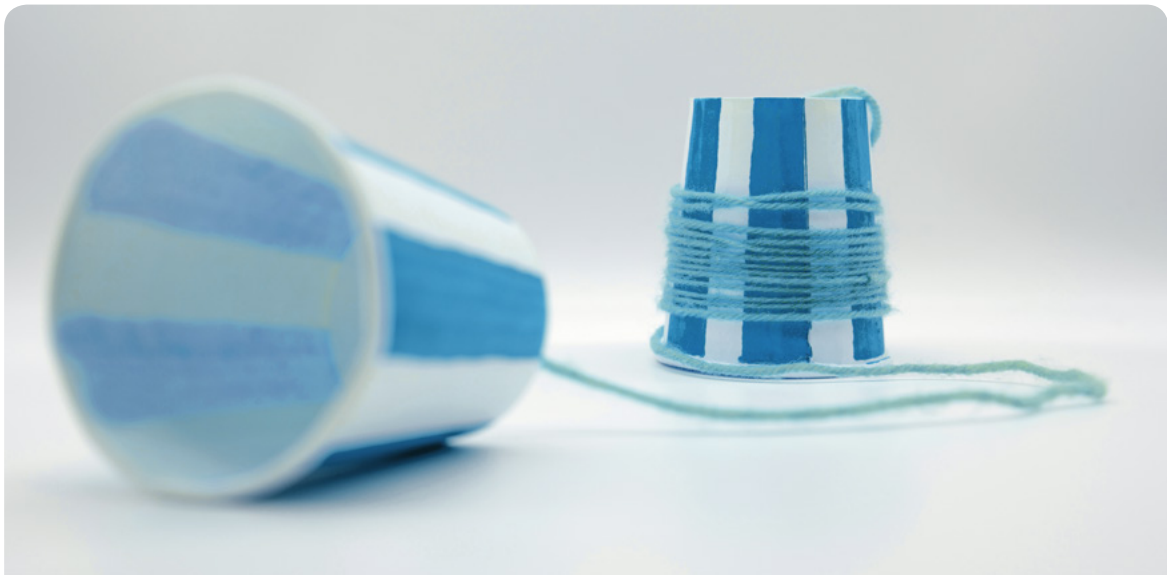
Drip Drip

As Professor of Marketing Science at the University of South Australia, Byron Sharp will tell you in clear terms, people have mental space that they need constantly filled up with messages. This is why brands such as Coke succeed as they are omnipresent – bus stops, supermarket shelves, TV, radio et cetera. Wherever you turn, they are there. Mars Inc have now also embraced this scientific approach to marketing.

Have consistent messaging and pack design

Related to the Drip Drip approach, you need to keep things the same. Same means you stick as a mental shortcut. Coke is so ingrained that in FMRI scans that leading neuro-marketing expert Dr Gemma Calvert has been running, it was discovered that if you just see red or the font, or the bottle shape, you will think Coke.

▶ SEE NEXT PAGE





Interzoo 2018

35. International Trade Fair for Pet Supplies

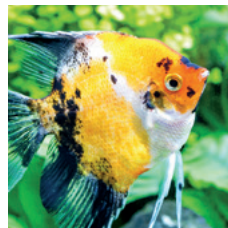
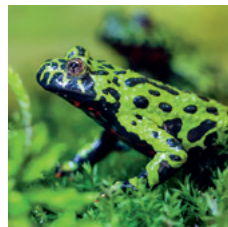
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Out-smart the competition

Challenger brands such as Pepsi (vs Coke) Kimberly-Clark and Unilever (vs P&G) utilize these simple learnings to take on their competitor who just outspends them by ten to twenty times. The great news is that you do not have to have billions to create great marketing.

Creativity is also an excellent way to think differently and out-smart the competition with limited funds. Be ready to step outside your comfort zone and maintain a broad horizon and take

inspiration from the categories mentioned on page 53. So what are you waiting for, go out and KISS! ♦



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Successful social media marketing

During the early days of the internet at the beginning of the nineties, the network was just text-based and purely scientific. These days it is a global network, connecting people through images, text and sound on any and every topic imaginable.

Resistance

Back then, I predicted that the 'world wide web' would transform the internet into a trading network with commercial banners, flashy websites and even online payment transactions.

Wherever I spoke about this upswing in so-called 'electronic commerce' I encountered resistance – a fear of the unknown. Nowadays, I notice a similar reaction regarding social media. Let's discuss how you can be successful with social media marketing.

Listening

Traditional marketing focuses on 'sending' your message to a target audience. In social media marketing, it works exactly the opposite way: you listen carefully to a broad audience and respond to topics as they come along.

I am not talking about straightforward 'webcare' here. Customers and potential customers expect way more from a company on social media, up to and including topics like corporate social responsibility translated to everyday life.

Back to basics

However, most managers still do not understand the principles and possible impact of social media conversations on their customers and employees. Communicating on social media is about going 'back to basics'.

You should communicate online with customers and potential customers exactly like the old pet shop owner used to do back in the seventies, when the internet was not available yet:

"Hi Johnny, how's your dog George doing?
Are you going to spoil him with some nice treats?
I got something back here that he will love to taste.
Here, give it a try."

Unfortunately, a lot of pet shop owners and other companies in the pet industry have lost this personal contact with their customers. It started when the sector began with CRM-like systems (customer relationship management). Customers and their pets became numbers and financial objects.

Personal accounts

To turn this around, managers should never ever communicate on a corporate level on social media. An official corporate account on social media can be inactive most of the time, with just a few messages a week. Management should stimulate their employees to use their personal social media accounts to communicate with customers and prospects on a human level, just as if they were talking with their own family and friends.

Invite influencers

Do realize that YouTube is also a social network, but make sure you post honest, authentic videos. This means straightforward recording with no fancy post-production like filters. Think in terms of practical 'how to' videos that show how to use a certain accessory. Or follow a pet through its everyday life. Invite influencers. Ask young people to use their vlogging skills to make videos with a selfie stick or a gimbal. It is better not to use a tripod; this will result in a static and boring film.

Authentic engagement

In general, social media marketing is all about authentic engagement. That is the way to become more relevant and successful on social media. ♦



Richard Lamb

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Crowd Branding: a Branding Revolution?

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Join the most important networking event for pet industry professionals. This year's theme is all about how private labels impact category management, pricing, and loyalty.

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19th GlobalPETS Forum
24 - 26 January 2018
Venice ITALY

Crowd Branding: a Branding Revolution?

GlobalPETS Forum is the most important networking event for pet industry professionals. Senior decision-makers of the world's leading industry players gather to network and be inspired by the latest developments. This year's theme is all about how private labels impact category management, pricing, and loyalty.

Private labels and brands

In the 20th century, brands dominated the market. The moment retailers moved to chain and franchise modules, the power of brands came under pressure from private labels. Today, private labels are changing towards the position of a brand, and the quality of the private label is matching that of the brand.

With the rise of online as a serious sales platform, we no longer listen to what people or companies say about themselves. Instead, we go online to learn what other people say (crowd culture) about others. Influenced by their comments, decisions are made. To create a successful brand means building a community of ambassadors, in an omnichannel approach, ready to share their love of your brand online.

Programme

Renowned speakers from inside and outside the pet industry will share their insights and hand you practical tips that will help and inspire you to improve your business.

Speakers include futurist Tony Bosma, retail expert Wouter van der Leij, and head of pet care research at Euromonitor Paula Flores. [See pages 64-69](#) for a preview of the keynote speeches.

Thursday's social evening is considered to be the main networking event of GlobalPETS Forum. Join us in the wonderful hotel bar to reflect on the day, sample delicious food, and enjoy a drink.



For more information on the programme, the speakers, registration and the city of Venice, please read the GlobalPETS Forum Venice online brochure globalpetsforum.com



GlobalPETS Forum

Pet retail panel: brick-and-mortar vs e-commerce

Retail is key for the future of the pet industry, and it is a necessity to look at what main pet retailers have to share with the industry. This year's panel focusses on brick-and-mortar retail and e-commerce.

CEO's of, among others, Pets at Home, Walmart Pets ecommerce, Tom&Co and Kiwoko will share their vision and insights. Under guidance of Dave Bolen, you will have the opportunity to ask questions about the most important issues and opportunities shaping the future of pet business. ♦

What is in it for you?

- Meet leading industry decision-makers and business partners from all over the world.
- Join retail expert Dave Bolen and CEO's of brick-and-mortar companies as well as major online players in a lively session.
- Get involved in the Forum, which has been called 'the place where deals are closed'.
- Learn from accomplished futurists, brand experts, retail strategists, and industry consultants.



The future of pet retail

Modern pet retail in an omnichannel world: brick-and-mortar vs ecommerce

The panel's theme

The pet industry world is changing rapidly. In this year's panel, we will address brick-and-mortar retail and ecommerce. How can customers be served? How do we see the role of specialty retailers evolve? How do our experts see the future for these channels? And most importantly, how can pet retailers make both channels successful towards an omnichannel strategy?

Ask the pet retail experts

Under the guidance of Dave Bolen, we will discuss the challenges, implications, and opportunities for the pet industry. As attendee, you may take active part in the discussion.

We have invited pet industry professionals from both brick-and-mortar companies as well as major online players to join. More names will be announced soon.



GM Pet Category at Walmart Global Ecommerce us
Dean Kelly

Dean Kelly is the GM of the Pet Category across the US for all of Walmart's Global Ecommerce channels. He began as a GM at Jet.com before it was acquired by Walmart in 2016. He is also the leader of the UNSW Entrepreneurs and Innovation Group, promoting and supporting new entrepreneurs from Australia in the US.

CEO Pets at Home uk
Peter Pritchard

Peter Pritchard is CEO of Pets at Home, appointed in 2016. He has been with the retailer since 2011, initially as Commercial Director and more recently as Chief Operations Officer. He is an experienced retailer, having worked for M&S and Sainsbury's.



CEO Tom&Co BELGIUM
Lionel Desclée

Lionel Desclée is Tom&Co's owner and CEO. In 2011, he joined the company as vice president operations and development, and contributed to revamping the brand and store concept. He has many years of retail experience.

CEO Kiwoko SPAIN
Alvaro Gutierrez

Alvaro Gutierrez is co-founder and CEO of Kiwoko, founded 10 years ago. He is an MBA graduate of the Stanford University Graduate School of Business.



Panel chair
Dave Bolen

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

Witnessing the big reset of today's world?



Modern consumers look beyond the superficiality of brands and marketing. They are looking for meaningful brands. Futurist Tony Bosma previews his GlobalPETS Forum keynote address.

Brands and trust

According to the 2017 Meaningful Brands survey, 74% of consumers would not be bothered if the brands they buy were to disappear. That also certainly applies also to the pet food industry. Our pets are occupying an increasingly prominent place in our lives. In spite of all the new media, a huge number of us feel lonely and are turning to our beloved pets. Urbanization is also leading to more attention to pets.

This is also having consequences for the increasingly critical attitude of consumers towards pet food and pet products.

Modern consumers are put off by superficiality. They have little time for popular catch-all terms such as 'sustainable', 'best for your pet' or 'natural'. Consumers get their information and knowledge from their own immediate network, so for organizations it is crucial to become part of that trust network.



A technological rat-race

Contact between consumer and organization will change radically in the years to come, and technology is the biggest cause of this. The accuracy of voice commands has increased to 95%, and it is expected that 50% of searches on mobile phones will be conducted by voice in 2020.

More and more devices listen to us and everything will be connected and smart. The era of 'mobile first' is seeing its last years and will now be replaced with 'AI first'. Bots are the new browsers and sensors will bring an entirely new dimension to customer contact and service. How long will conscious purchasing decisions be made when the environment of customers and pets is getting increasingly smarter? Who will decide what the animal gets to eat: the owner, the animal or the container that the animal eats from?

The future is that of smart software that represents consumers online. Terms such as conversational commerce, 'speakularity', visual listening, predictive data and ambient intelligence are just the tip of the iceberg in the technological rat-race in which organizations and society are now embroiled.

Digitizing trust

In a world in which people's trust of organizations and institutes is under pressure, we are even digitizing our trust. We are witnessing the birth of the review economy. In this, we trust our immediate network above every form of authority. However, consumers must have the knowledge and skill to handle the information available online. The challenge for organizations is to once more be regarded as a sincere expert or authority that wants the best for people and animals.

A technological Holy Grail?

Technology has now become the ultimate solution for all challenges in this modern digital era. But, in fact, nothing could be further from the truth. Organizations frequently fail in implementing new technology because they lack the skill to dispense with learned assumptions and behaviour. These are assumptions and behaviour from the time of mass communication, when organizations controlled the message that they wanted to communicate.

This is no longer the case. Today we are seeing the end of control and the beginning of influence. What is probably most important: the customer is changing from a product searcher to a simplicity searcher. Simplicity is the key to every good service experience. It fosters trust and the will to allow organizations into the consumer's circle.

The organization's focus is on reach instead of impact. Marketers must use technology to give their customers convenience by having an impact at the times when they want that, and by simplifying and enriching their lives. This will be a major challenge for the marketing and strategy of organizations.

The need for a change in mindset

Exponential technological change combined with a change in mindset and the increasing impact of consumers will bring the need for a radical revision of assumptions regarding market strategy. Far-reaching transparency in an increasingly volatile market means that every organization must develop into an anticipatory organization. That is today's reality in the world of pet food. ♦



Tony Bosma

Futurist and trendwatcher
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Retailer and supplier collaboration drive private label growth



Retailers who used to depend on brand manufacturers have changed the game. Private label expert and GlobalPETS Forum speaker Koen de Jong shares his views on brand evolution.

Private label and brand building

At first, retailers did not possess a great deal of knowledge or experience in the field of packaging and product quality. However, as they acknowledged its strategic value, they started to invest heavily in building their stores into strong brands and placed private label at the centre of their strategy. Retail concentration fuelled competition and private label was assigned a pivotal role in driving shopper loyalty and improving profit.



Retailer consolidation

Phenomenal success has taken retailer brands to maturity over the decades. Manufacturers and retailers have made an effort to market good-quality products in attractive packaging.

This has resulted in consumer acceptance and trust. In Europe and North America, the market share of retailer brands in the pet food and pet accessories category has even exceed market averages.

An important driver of this growth has been retailer consolidation, notably in Europe. In a more concentrated landscape, retailers use private label to differentiate themselves from the competition, while customer loyalty can be built by offering a unique and attractive product range. In addition, the role of discount retailers in driving private label growth should not be underestimated.

Retailer and supplier collaboration

Retail brand manufacturers operate in an extremely competitive environment and the balance of power has shifted in favour of retailers. For a supplier, the retailer may represent a significant proportion of overall sales. For the retailer, on the other hand, this proportion may represent only a fraction of turnover. In fact, the private label market could be described as a quasi-monopsony: a market form in which a few very powerful buyers interface with many suppliers. Retailers can exploit their bargaining power as they face overcapacity in retail brand manufacturing. To survive in this fiercely competitive market, best-in-class suppliers excel in adding value to their overall offering by means of superior collaboration and innovation.

A necessary vision and strategy

Retail brand manufacturers do not get away with inefficiencies, and resources like labour and capital must be allocated with extreme care. For this reason, they must have a clear vision and strategy: no resources should be wasted on projects that do not fit. Manufacturers have to manage complexity in production. Supplying a range of retailers with a multitude of products is a challenge and can easily conflict with the necessity of producing at low cost. At the same time, they have to continuously drive-down costs to remain competitive.

Successfully adding value to the overall offering may make manufacturers the retailer's supplier of choice. It boils down to understanding their role as a partner in driving category growth and profitability with private label innovation, and thus become a best-in-class player. ♦



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Managing Partner IPLC
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The future of retailing



Retailing is changing at a rapid pace – throwing up challenges and opportunities for all participants. Tom Gladstone shares his vision and previews his GlobalPETS Forum keynote speech.

Professionalization of convenience

Globally, we have seen ongoing growth of big box retail, the (re)-emergence and professionalization of convenience and the rapid development of online pureplay and integrated multichannel propositions.

And beyond all that is the behemoth that is Amazon (and similar platforms) who are not just aiming to build a compelling online global retail platform – but to combine it with other propositions such as Prime and Marketplace, entertainment to create the flywheel that wins and sustains a high share of consumer transactions and interactions.



Evolving consumer purchasing journeys

At the same time we are seeing increasing polarization between value-led propositions and niche, premium or service-led propositions. Consumer purchasing journeys are also evolving – increasing levels of research, a higher importance of trust and greater influence of social media and digital marketing means many more purchasing decisions are now influenced before the shelf-edge.

This has allowed brands who have taken advantage of these trends and built the right capabilities to gain market place traction and gain share – but also allowed new disruptive brands and models to emerge.

For example, in the US, Dollar Shave Club has very rapidly gained a share of the men's shaving market through combining a direct-to-consumer subscription model with a value orientated product and viral digital marketing.

The future of pet retailing

For those involved in the pet products industry, these trends raise many questions. What will the future of pet retail look like and what pace of change might we expect over the coming years? How might consumer purchasing behaviour evolve in the pet products space given how we have seen other categories evolve? What might be the implications for those supplying products and brands into the sector?

This might be a daunting set of issues to grapple with – but there is much that can be learnt from how other sectors have evolved and how brands and retailers have responded. Pet products has been a relatively slow adopting category in terms of online migration and multichannel development – and the successes (and just as importantly, the mistakes) of brands and retailers in more developed categories can guide potential successful routes forward.

We will have to see how retail in other product categories is developing, what that has meant for suppliers operating in those sectors (and how they have responded) and some potential implications for the pet products category. I believe these changes in the landscape create many opportunities for industry participants – and hope I can excite you enough to take advantage of these. ♦



Tom Gladstone

Partner in OC&C's consumer team
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occstrategy.com



The GlobalPETS Forum Award

Each year, the GlobalPETS Forum Award is presented to a company demonstrating an exceptional performance in the international pet industry. The Award is a prestigious prize and winners are truly honoured to be put in this spotlight.

Last year, West Paw Design won in acknowledgement of the innovative way they manage and expand their business ecosystem.

Who will be the winner in 2018?



West Paw Design UNITED STATES



Valta Pet Products RUSSIAN FEDERATION





Previous winners

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2007



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2014



Vafo Praha CZECH REPUBLIC

2010



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2006



ROGZ SOUTH AFRICA

2013



Pet Lovers Centre SINGAPORE

2009



Tetra Europe GERMANY

2005



Koch Heimtiernahrung AUSTRIA

2012



Vital Petfood Group DENMARK

2008



Rolf C. Hagen CANADA

2004



Pets at Home UNITED KINGDOM



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Beeztees THE NETHERLANDS



Beeztees is a brand that offers accessories for dogs, cats, rodents, birds and fish. With a team of approximately 95 enthusiastic employees, they are continuously trying to invent, design, plan and sell. All products are thoroughly tested. They renew our product range every year with more than 1,000 new items.

Dr. Harvey's US



As a pioneer and the very first companion animal food producer in the ultra-natural and all-natural category of pet food, Dr. Harvey's has dedicated itself over the past three decades to this vision: helping guardians give their companion animals a better, healthier, happier, longer and more fulfilling life.

Kit Cat SINGAPORE



Founded in 2013, Kit Cat is a destination for specially made, wholesome and natural cat products that is made up of fresh raw materials. The owners, two dedicated brothers, are committed towards being transparent about the sources of their products to deliver the best for their cat loving customers.



Eldorado DENMARK



Eldorado is Scandinavia's largest wholesaler in animal supplies and riding equipment. The company provides weekly products to all its distributors in Denmark, Sweden, Norway and North Germany (through Hamburg). Eldorado's customers are primarily pet shops, dogs and cats stores, sports shops, riding sports stores and veterinarians.

Ferplast ITALY



The Italian retailer Ferplast produces over 2,000 types of products and distributes in no less than 80 countries on five continents, and has global trading branches and has three European production sites. Not only dogs and cats but also rodents, birds, fishes, amphibians and reptiles: the Ferplast range offers solutions available for the wellbeing of each family of animal.

Fish4Dogs UK



Fish4Dogs is a small independent company with just under thirty employees working from our base in rural Worcestershire. The idea behind Fish4Dogs was to use, productively, waste from the fish industry. Humans only eat 50% of the fish despite the rest being perfectly nutritious. Sustainability and minimising the environmental impact are key.

Musti ja Mirri FINLAND



Musti Group is the leading pet specialty retailer in the Nordics. The company operates 115 stores in Finland, 115 in Sweden and 4 in Norway and its product assortment comprises a wide range of pet supplies. The assortment includes high quality pet food and accessories for dogs, cats, rabbits, rodents, birds and aquarium fishes.

Prins Petfood THE NETHERLANDS



Prins Petfoods is a Dutch manufacturer of 100% natural pet foods for dogs and cats. The products are based on premium grade raw ingredients and nutrients to support healthy body functions. Prins products are developed entirely without animal testing and are free of odouring, colouring and flavouring substances.

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What can you expect?

CIPS once again centers most of the world's well-known brands and all of the significant manufacturers in China and in Asia. The pavilions will represent pet industry professional from Germany, Hong Kong, India, Italy, Japan, Korea, Singapore and Taiwan. Displaying their latest exhibits and concepts, the pavilions will be visited by customers from more than eighty countries.



Join CIPS

With an intense programme which serves to cater to all pet professionals, CIPS is expected to be a marvelous opportunity for all customers and exhibitors in the world to connect, network, and expand business. ♦

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"CIPS will open the doors for entering the Asian, and especially the Chinese, market. In today's world, not only brands but also private labels fulfilling the role of brands, are vital for doing global business. Asian suppliers are the players who can provide you with current and innovative options. The international character of the CIPS is underlined by the 1,500 exhibitors from 30 countries. It is important to realize is that Asia's role, and China's position in particular, as the purely sourcing countries is changing. Asia is the fastest growing pet market in the world. The estimation is that it will become at least as big as the US in the years to come. The Chinese government stimulates the country to change from being a producer to a business that adds value to products through Chinese innovation. This is why GlobalPETS Forum Asia, co-organized by the CIPS and PETS International, is focussing on creative thinking and innovation. Our approach is to engage you in workshops which provide you with practical implementation tools."



Yang Cheng
CIPS president



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CIPS 2017 - HALL 6.2, BOOTH A188

Aqua One China Co Limited
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Looking for OEM partners worldwide

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Italy

The positive growth of the Italian pet market continues. Italian pet owners demand higher quality pet food products, boosting value sales. Industry competition has intensified, and price pressure is also becoming more significant with the growing presence of private label products.

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Pet care in Italy



Pet care has seen positive growth in Italy recently. Italian pet owners demand higher quality pet food products, boosting value sales.

Premiumization

Pet care has seen more positive growth in current value terms in Italy in 2017. Growth is being driven by the strengthening interest of pet owners in higher quality products. This is being seen especially in cat food and dog food, where demand for a high meat-content, grain-free products and organic ingredients is also rising. Also, products which showcase more concrete targeting of pets, such as size and age-specific products, are seeing increasing attention. Stronger value sales are being facilitated by the slowly improving purchasing power of Italian pet owners.

Multinational players

International manufacturers and brands led pet care in Italy in 2016. Only a few domestic companies are fully active, such as Rinaldo Franco SpA, Morando

SpA and Monge & C SpA. There are also a few multinational companies which have manufacturing facilities in Italy, such as Nestlé Purina PetCare Italia SpA which has two production sites in Portogruaro and Udine.

Competitive environment

Industry competition has intensified in pet care in Italy in 2017. This is due to the increasing number of minor manufacturers of pet food and pet products present in the market. Price pressure is also becoming more significant with the growing presence of private label products, with players expected to fight the intensifying price promotions/discounts with stronger advertising. With internet retailers gaining share in 2017, price competition, particularly between mid-priced and premium brands, is an increasing challenge.



Internet retailing

Internet retailing continues to gain in popularity among pet owners in Italy, with the channel seeing dynamic current value growth. There has been an increasing number of consumers comparing prices online, with advertising also becoming more sophisticated, moving from exclusively online media to printed press and billboards. Typical bricks-and-mortar retail stores are expected to increasingly establish their own online sales operations in order to more efficiently compete with exclusively online players.

Continued growth

Pet care is predicted to post moderate value growth over the forecast period at constant 2016 prices. Growth is expected to be positively impacted by growing demand for higher quality products as well

as consumer interest in health-specific pet food. With slight pet population growth in key areas, such as the number of pet cats and pet dogs, due to the ageing population, the growth potential remains significant.

Sales should also benefit from pet humanization and the increasing education of pet owners in Italy regarding pet nutrition and wellness. Further value growth over the forecast period is likely to be achieved through the grouping of dog treats and cat treats into functional and indulgent offerings with unique tastes and textures. ♦

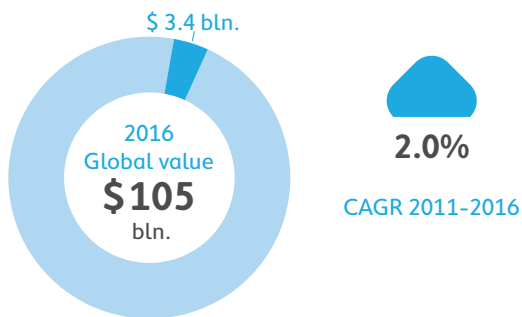


Paula Flores

Head of Pet Care, Euromonitor International
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euromonitor.com

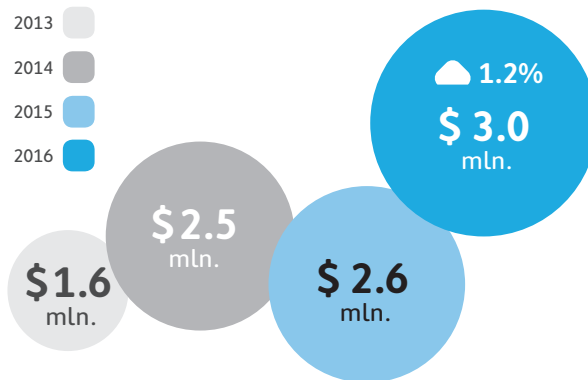
Italy

Industry value and growth rate



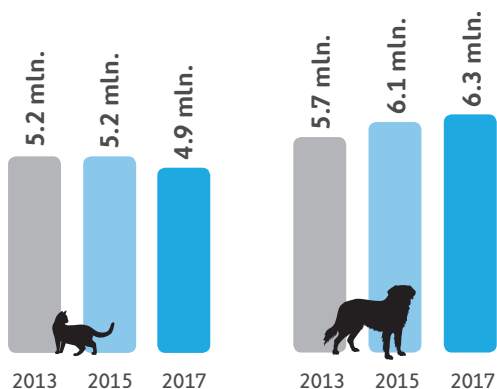
Market size pet care

Retail value RSP | Fixed 2017 exchange rates

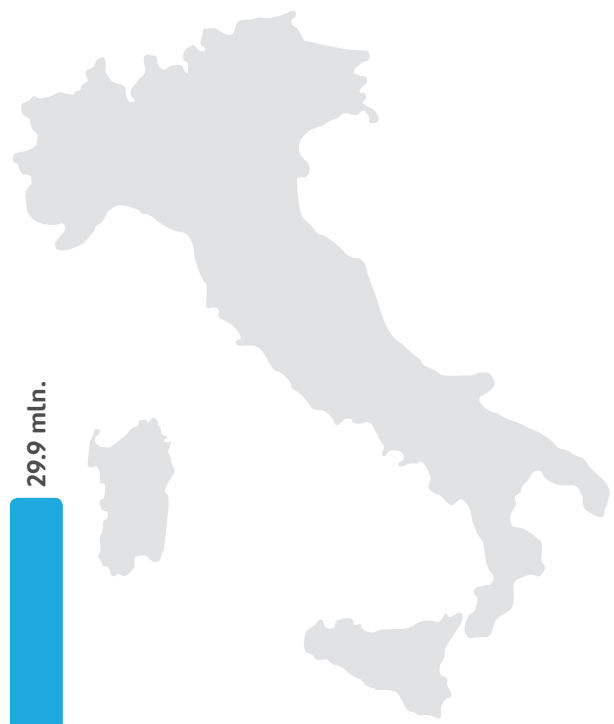
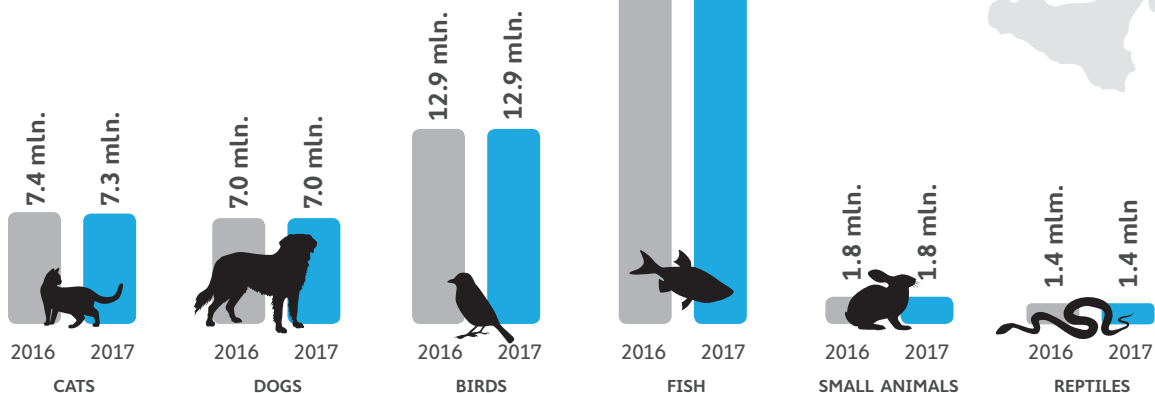


Pet ownership

Number of households with cat or dog



Pet population



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Italy: a dynamic market

The positive trend of the Italian pet market continues.

Growing market

According to the *ASSALCO – ZOOMARK 2017 Report on Pet Food and Pet Care in Italy* there are currently 60 million pets in Italy, an average of one pet per person, and 2.3 per family.

In 2016, total turnover for dog and cat food products in Italy reached €2 billion (\$2.4 billion) in value, with a volume of 559,200 tonnes sold. The positive trend in the Italian market continues, with an increase in turnover of 2.7% over the previous year and an increase in volume equal to 1.3%.

Main segments

The cat food segment accounts for 53.2% of the total turnover for the grocery, traditional pet shop, plus pet specialty chains market, for a combined value of €1.0 billion (\$1.2 billion). In value, dog food accounts for 46.8%, equal to nearly €923 million (\$1.1 billion). This breaks down into 52.1% dry food, 34.2% wet food, and 13.7% snacks.

In 2016, all three main segments of dog and cat food (wet, dry, and snacks and treats) grew in value. Specifically, snacks and treats continue to post double-digit increases (+10.3% in value), the highest growth rate in the market. The best performances were recorded in the specialty chains channel, where cat snacks were up by 11% and dog snacks by 19.7%.

Non-food

According to data collected from hypermarkets, supermarkets and small retail, the accessories segment continued its growth trend in 2016 with strong increases in the mass market, which grew 6% in value, for a combined turnover of €72.3 million (\$86.7 million). The positive trend in the segment was driven especially by products for animal hygiene, which grew by 27.4% in value over 2015. This was followed by toys (+10.1% in value) and anti-parasite treatments (+3.5% in value). Cat litter sales increased in value by 3.7%, for a total turnover equal to €67.4 million (\$80.8 million).

Distribution trends and dynamics

Cat and dog food are sold through three different distribution channels: mass market, traditional pet shops, and pet specialist chains. Mass market accounts for 56.8% of the total pet food turnover (€1.2 million – \$1.4 million). Pet specialty chains (about 503 stores in total in Italy so far) keep growing in double-digits: +12.6% (€221.2 million – \$265.1 million).

Specialized distribution

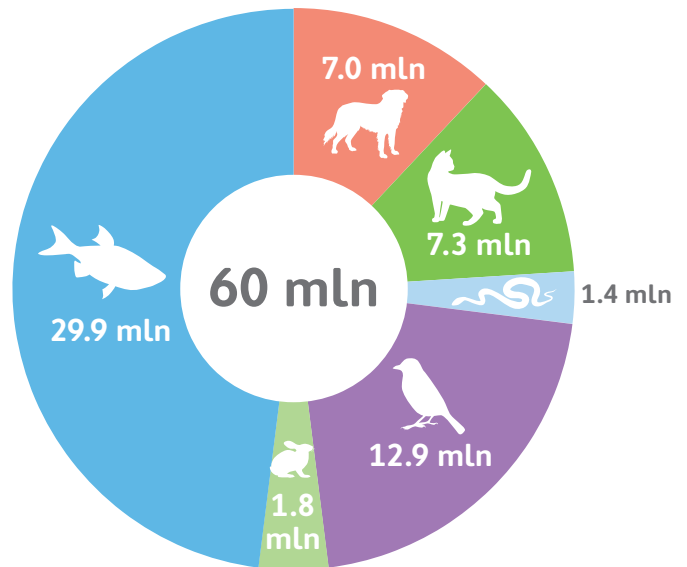
The Italian magazine Pet Trend has compared data from Italian pet shops from 2012 to today in order to track trends in the specialized retail sector. The survey reveals that Italian retailers are mostly younger – either below 35 (26%) or between 35 and 45 years of age (41%), and are pet-owners themselves (93%).

Almost all pet shops sell accessories and products for pet hygiene, in addition, of course, to food and snacks. Six out of ten also offer auxiliary services, such as grooming and home delivery. Only three in ten sell pets, and these are primarily larger retailers.

Web-based promotions have increased sharply for the pet shop channel, particularly for the larger retailers (40%), with the aim of attracting customers to the shop. Pet-owners tend to be frequent and loyal clients – just under six out of ten – and ask the pet shop for advice, mostly regarding pet hygiene, the choice of a veterinarian and training.

Traditional pet shops (about 4,912) are currently the main distribution channel for pet products. Their turnover is still growing though they have suffered from structural change, such as a growth in the popularity of medium-small breed dogs, changes in purchasing behaviour, and the growth (and competition) of specialized chains.

Number of pets in Italy



Source: Euromonitor International, 2017

Nevertheless, innovation, services and focus on core business have had positive effects despite strong competition with specialized chains, which are growing at a double-digit rate. In Southern Italy, due to less competition with specialty chains and e-commerce, traditional pet shops remain the major channel for distributing premium and super premium pet products. ♦



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Inodorina ITALY

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Inodorina was founded with an international market in mind. After its successful expansion into Spain and Portugal, Greece, Croatia, Serbia, Poland, Bulgaria, Saudi Arabia, Malta, Romania and the Czech Republic, the company is now aiming at Central Europe, China and the United States by seizing the emerging opportunities of a dynamic and quickly growing industry.

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Pratiko ITALY

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Pratiko has introduced a new innovative lifestyle concept: Kappottina duo. This elegant collection has an unique design consisting of an adjustable harness, made from ecological and hypoallergenic pvc, combines with upholstery made of thick, waterproof, and breathable textile fiber. Kappottina duo is extremely comfortable and easy to wear. Italian style, practicality and tailored fitting are the prerogative of all of our handcrafted manufacturings.

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Spring | Summer COLLECTION 2018



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Italy



Maxi Zoo ITALY

An Italian retail specialist

**With more than 85 stores and 8,000 different pet products,
this Italian company is a retail virtuoso.**

Italy

A valuable partner for pet lovers

Maxi Zoo Italy is part of the Fressnapf Group, the largest European retail chain dedicated to pet food and accessories. Founded in Germany in 1990, today the Fressnapf Group has nearly 1,400 stores and 11,000 employees across Europe, with a turnover that in 2016 reached €1.86 billion (\$2.21 billion). Led by CEO Marco Premoli, Maxi Zoo Italy had reached 75 sales points by December 2016 and achieved a turnover of €90.5 million (\$107.6 billion). Maxi Zoo Italy employs 530 people.

Maxi Zoo is a valuable partner for all pet lovers in Europe. Its mission is to “Make Pets Happy” and the company is committed to providing quality products at affordable prices, competent service, and expert advice, in order to pursue its ultimate goal of promoting animal welfare.

Private label strategy

Maxi Zoo has a rich, exhaustive range of 8,000 products for animals (dogs, cats, birds, rodents, fish and reptiles) that meets the growth and nutrition needs of all pets. Its product offering covers all price ranges (from first price to super premium bands) and always guarantees the highest quality, while respecting the most rigorous hygiene and ethical standards.

The company’s fifteen private labels are a strategic pillar that sets it apart from competitors and accounts for about 45% of its turnover. More than 3,000 exclusive products are available in each store, all of the highest quality.

Quality and competence

Maxi Zoo’s greatest strength lies in competence: in fact, advice and expert consultations are offered in stores by its team of dedicated professionals. All staff are trained at the Maxi Zoo Academy to provide all kinds of advice on animal care and well-being. Training programmes involve veterinarians and psychologists and include e-learning programmes plus fifteen days a year in the classroom. Thanks to this unparalleled training programme, Maxi Zoo staff can provide customers with optimum advice on all aspects of their pets’ daily growth, and on living with them.

Six of the current Maxi Zoo stores in Italy are XXL Stores. Each boasts an offering of about 15,000 items, setting a new standard of excellence in the sale of products for small pets (fish, rodents and birds). The company is currently introducing a new store format that simplifies purchasing and facilitates customer flow, while emphasizing new consumer trends such as non-food products and snacks. The new stores are also being prepared for cross-channel marketing. ♦

- ♦ **Maxi Zoo**
Maxizoo.it
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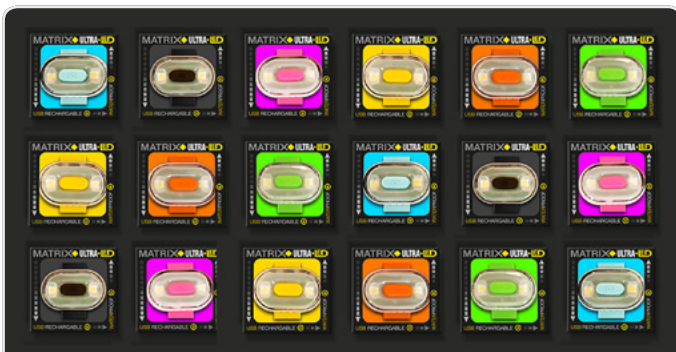
PR-Pet B.V.
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Zolux FRANCE Introducing the new cat dome Louna

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lexenmax.nl



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CIPS 2017

16 to 19 November 2017

National Exhibition and Convention Center,
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en.cipscom.com



GlobalPETS Forum Europe 2018

24 to 26 January 2018

Hilton Molino Stucky Venice,
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globalpetsforum.com



Iberzoo 2018

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Feira de Madrid, Madrid, Spain

ifema.es/propet_06



PATS Sandown 2018

20 to 21 March 2018

Sandown Park Exhibition Centre Esher,
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patshow.co.uk



Global Pet Expo 2018

21 to 22 March 2018

Orange County Convention Centre,
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globalpetexpo.org



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29 March to 1 April 2018

Tokyo Big Sight, Tokyo, Japan

interpets.jp



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17 to 19 April 2018

International Exhibition Centre, Kiev, Ukraine

zoovetexpo.com



World of Pet Supplies 2018

20 to 23 April 2018

Hong Kong Convention and Exhibition Centre,
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hktdc.com



Interzoo 2018

8 to 11 May 2018

Exhibition Centre Nuremberg,
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interzoo.com

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Tempting Trios

Grain Free
Sans grains

PÂTE WITH TUNA, CUTS OF CHICKEN,
SWEET POTATOES & PUMPKIN
PÂTE AVEC THON, MORCEAUX DE POULET,
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3 IN 1 FOOD COMBO • COMBO D'ALIMENTS 3 EN 1 POUR CHIENS

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SUCCULENT FLAVOURS:
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