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Working dogs

Diet, tools, training and dedication required to be the best in the field.

Botanicals

Insights into this growing category and updates on the US and European markets.

Austria, Germany and Switzerland

Developments and trends in the German speaking countries.



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Working dogs

Get to know how the hardest working animals in the world are made. Starting with the right diet and tools, to the dedication it takes to train them.



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Austria, Germany and Switzerland

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Innovation stems from the niches!

Innovation in the industry quite often starts with completely new products and, in some cases, even the category the product belongs to does not exist yet.

In this issue we focus on three small segments with a great impact on innovation in the pet industry:

1. Working dogs is a growing segment.

Working dogs are no longer used for physical assistance only, but more and more for a wide variety of psychosocial tasks. This means a source of innovation for the pet industry.

2. Food and snacks based on CBD

ingredients with their therapeutic effects is becoming a hype in the US and these products are also entering the European market. In this issue a first exploration of this subject. At the beginning of 2020 we will dive deeper into this topic.

3. Wearables – especially the ones based

on Bluetooth, GPS and AI – have a great future; we explore the market opportunities. They will determine the new boundaries of the pet industry.

Austria, Germany and Switzerland, referred to as the German speaking countries, form an important part of the European pet market.

These markets are changing, due to the aging population. This leads to a growing popularity of smaller dogs or cats, meaning less food is needed. But can less be more?

Moreover, we take a look at countries with growing private label market shares. In this section you will also find an exclusive interview that PETS International had with Torsten Toeller. We discussed his views on the turbulent market developments in offline and online pet channels and what this means for the Fressnapf Group, that is celebrating its 30th anniversary in 2020.

Furthermore, we are proud to introduce to you the speakers of the GlobalPETS Forum 2020, that will be held 20-22 January in Athens. In addition to the attractive keynote speakers, we will also introduce you to some very interesting pet industry speakers!

On top of that we proudly present our newly designed GlobalPETS Forum 2020 Award, as well as the nominees. Who will be the winner of the GlobalPETS Forum Award in 2020?



Corine van Winden, CEO

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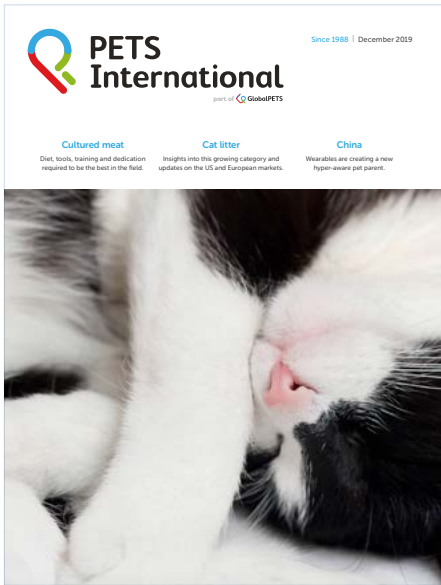


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Sustainability in litter

China

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in relation to international
trade developments

Insider survey
about the litter
industry

Cultured meat

Upcoming issue | Advertising deadline: 25 October 2019 | Publication date: 22 November 2019

Contact head office (see page 80) or local representatives (see page 79).

Pet industry highlights



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Correspondence may be edited for clarity or length.



Tom&Co continues to expand in France

Tom&Co, Belgium's largest pet store chain, has just opened its 32nd outlet in France. The store's

excellent progress in the region over the past six years is the result of its dedicated and growing following who have been won over by the numerous in-store services.

Each store has a dedicated community space, where valuable exchanges can take place between pets, owners, specialists (dog trainer, Trail Ball, Canicross, canine osteopath, etc.) and associations. A strategy that is winning over the French and more.



New chairwoman joins Interzoo Advisory Committee

Katharina Engling is the new chairwoman of the Interzoo Advisory Committee. She succeeds Hans-Jochen Büngener, who is passing on the baton after 31 years of service.

Having previously served on the Advisory Committee, the 47-year-old Katharina has now been appointed chairwoman by the Board of the ZZF (German Pet Trade and Industry Association), the honorary sponsor of Interzoo.

What can the pet industry expect? Katharina Engling says: "Interzoo is the world's leading international trade fair for pet supplies. Naturally, the objective of all stakeholders is to ensure that we continue to play this role in the future." This involves sharing and discussing different perspectives, experiences and ideas and putting them into practice to make sure that Interzoo continues to thrive.

Cyb-Org opens first unmanned pet food store in Tel Aviv

Israeli pet retail veteran Erez Gur launched Tel Aviv's first unmanned pet supplies store, NowPet, in collaboration with Cyb-Org Auto Shop Ltd., an Israeli technology-intensive retail and wholesale management company. Customers can now shop 24/7 – literally – with the touch of a finger.

After guests register for membership, the store is available anytime to customers via their fingerprint or facial recognition. Inside the store sensors are used to determine, by its weight, which product a shopper took from the shelf, which is then followed-up with a completely automated payment process.

CEO Gur thinks this is the future of retail and the way to compete with online retailers. He says "the store will sell its pet food at prices 20-30% lower than other places", thanks to the no longer necessary staff.

NowPet is looking to invest in an additional 20 stores and, eventually aspires to have 100 such stores across Israel. They are also registering three patents in Israel, the United States and Europe, with interest from retailers abroad.

More details via: cyb-org.com/#360-solution



Pet industry highlights

New identity of the World Pet Association (WPA)



Through a creative rebranding initiative and new partnerships and programs, WPA is evolving to meet the needs of the ever-growing industry – from retailers and manufacturers to pet service professionals and consumers.

WPA officials said that they are focussing efforts around four key pillars:

- producing world class trade and consumer shows and events
- providing industry action and leadership
- supporting retail with business services and value-added resources
- giving back through community good works

As part of the rebrand, WPA has a new logo. The design features a modern look, with softer lines and a subtle outline of a dog, which officials said represents WPA's personality – progressive, caring, responsive and a steward of the industry and pet community.

Kalsec and Diana Pet Food form a joint venture

Two leading companies, Kalsec Inc. and Diana Pet Food, are coming together to start Videka, a company producing natural protection solutions for the pet food industry. The focus will be on helping partners achieve clean labels, trustworthy ingredients, and maintaining rigorous quality and safety standards. The new brand is armed with the experience of innovation in palatability and specialty pet food ingredients from Diana Pet Food, and oxidation management expertise in human food from Kalsec.



IQI strengthen their management team



IQI is welcoming two new members onto their management team in the purchasing and sales departments. Chad Helberg will be joining from the US, as the new Global Purchase Director.

After 26 years in purchasing, working in the ingredient markets at Mars Petcare and ADM he comes well equipped for his new role, which will include responsibility for the end-to-end supply chain and building long term relationships with suppliers.



On the sales front Steven Patist joins as the new Global Sales Manager. He will be responsible for managing global key accounts in the pet food industry. With his experience in building long-

term relations with customers, he could be the perfect fit to help IQI and their customers realise sustainable growth.

Maxi Zoo Ireland opens 10 new shops

Pet retailer Maxi Zoo will open 10 new stores throughout Ireland by 2022, growing the Irish branch of the organisation to 30 stores managed by 250 employees. The first of the new stores is due to open this September at the Omni Retail Park in Santry, north Dublin. The retailer is part of the Fressnapf Group, which has over 1,500 shops across Europe, and says the announcement shows 'strong confidence in the pet industry', as well as in the Irish retail sector.

MERA pet food reinforces exports capabilities



To achieve their goal of global expansion and identifying new markets, MERA (Germany) has brought on Frank Riemenschneider to head the export team, thus reinforcing their framework for further expansion of the international export activities.



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General Mills shuffles executive leadership

The General Mills pet segment in Europe and Australia has announced several leadership changes, including retirement announcements and reorganisations in finance. After 21 years with the company, including 12 years as chief financial officer, Don Mulligan is slated to retire on 1 June 2020. As part of the transition process, Mulligan will shift to an advisory capacity starting 1 February 2020 and stay on until his retirement in June 2020. He will be succeeded by Kofi Bruce, the current vice president and controller for company planning and analysis, by 1 February 2020.

After working at General Mills for 20 years in various marketing leadership categories, Dana McNabb, the current president of US cereal for General Mills, will become the new group president of the Europe and Australia segment, starting 1 January 2020.

Coveris boosts its presence in the pet food packaging sector

Coveris is investing in expanding its capacity in assembly and cylinder engraving at its Germany site, in Neuwied. It is a key element of its successful ongoing program of improvements. These investments are to be completed by the end of 2019. One of Coveris' best and highly specialised facilities for pet food is located in Firminy, France. Having started stand-up pouch production at their Firminy site in late 2018, Coveris will launch a new flat pouch system for dry food at this site in September 2019. "This means we will cover a wide range of products here, too, and be able to offer our clients the entire range of plastic and paper solutions," concludes CEO Jakob A. Mosser.



Bethowen Group appoints a new CEO

George Chkareuli has been appointed as the CEO of the Bethowen Group. George has been the Deputy General Director for Economics since the company's inception in 2010. He has worked in leadership roles in large Russian and international companies for over 20 years, including the positions as CFO for Mars Inc. and 36.6 Pharmacy Chain. George holds an MBA from Emory University (US) and has an honours degree in Theoretical Physics from Tbilisi State University.

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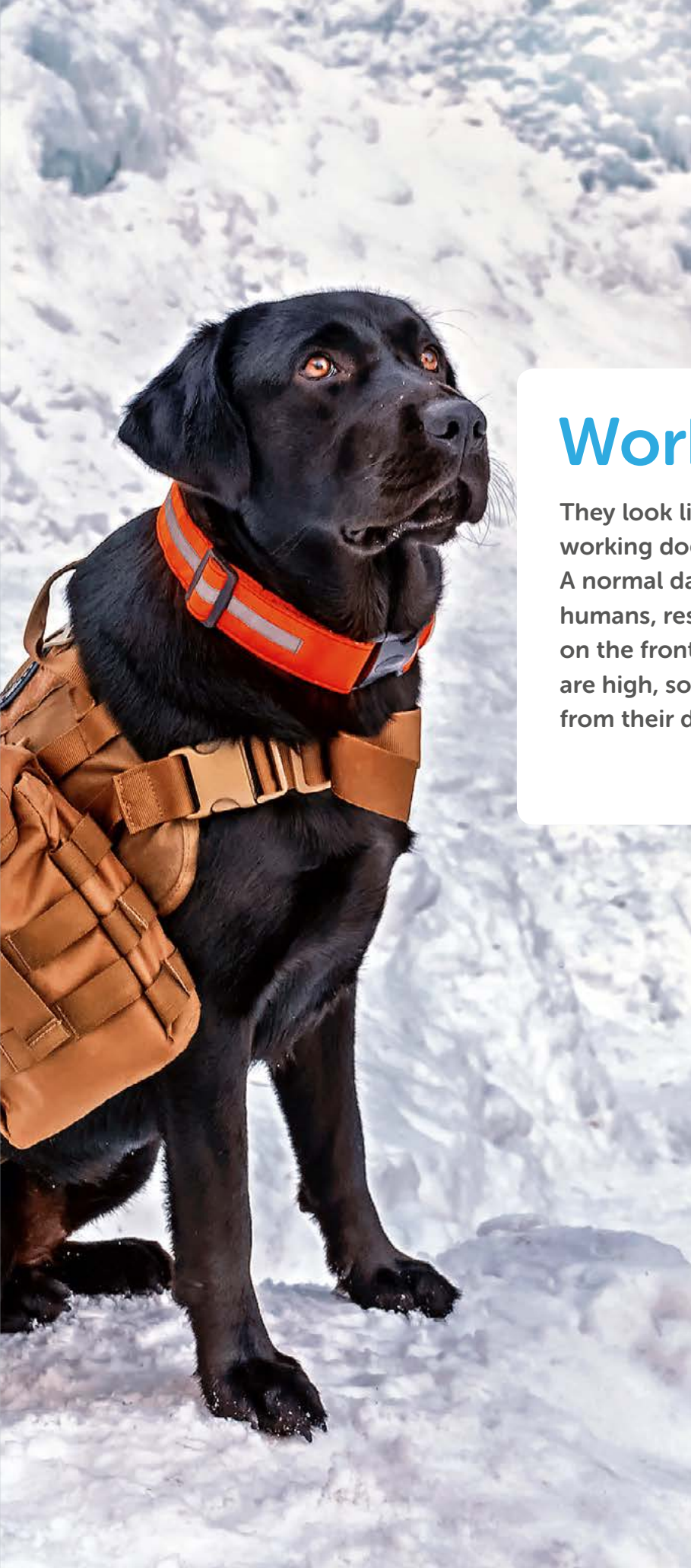
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Working dogs

They look like your everyday pet, but working dogs are a breed of their own. A normal day could include sports, guiding humans, rescuing distressed citizens or being on the front lines. The pressure and demands are high, so these dogs require top care, from their diet to their toys.

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What should a working dog eat?

Besides their conventional role as a pet, dogs are widely used for both sport and work activities. The duration and intensity of the activity, as well as environmental conditions under which these dogs are working, can vary significantly. Feeding working dogs is therefore demanding and greatly dependent on the type of work performed.

Sport and work

In sporting and working dogs, exercise induces various physiological responses as a result of type and intensity of work. Type of work can vary from short duration exercise performed at high intensity, as seen in hound races, to a long duration with

medium to high intensity, as seen in sled dog races. In search and hunting dogs, apart from obedience and scent detection, prolonged duration of work is expected, which combines intervals of different intensities in a variety of environmental conditions and terrains.

Prepared for the job

Nutrition of working dogs should prepare the organism for high demanding activity and prevent injuries. For that reason, the recommended proportion and source of specific macronutrients in the diet should be in accordance with the type, intensity, and duration of the activity.

In dogs that are expected to perform a short but high-intensity activity (racing hounds) the daily ration should consist of easily digestible carbohydrates at the level of approximately 50% metabolic energy (ME). On the other hand, for dogs that are expected to exercise for a prolonged period at medium to high intensity, carbohydrate portions may be lower, with fat and protein-energy levels adjusted according to a specific activity.

Sled dogs appear to require a high protein (30-40% ME), high fat (50% ME) diet. Other groups of working and sporting dogs would fit somewhere in the middle: ME from protein approximately 25% and from fat 35-45% ME.

It is important to keep the protein level in the diet at optimum levels, as low-protein diets have been shown to reduce VO_2 max and increase the rate of soft-tissue injury in exercising dogs.

Different metabolic pathways

The reason for the abovementioned is that different metabolic pathways predominate in short and high-intensity exercise (anaerobic) versus medium to low intensity, during a prolonged period (aerobic). Therefore, different substrates are used as an energy source: in the anaerobic pathway that is glucose; in the aerobic pathway it is fatty acids. Dogs metabolise free fatty acids at twice the rate observed in humans, hence the dog muscle is more adapted to use fat than human muscle.

Stress and performance

Stress has a major impact on the health and performance of working and sporting dogs and a strenuous workload can result in gastrointestinal symptoms. Therefore, a highly digestible, appropriately balanced diet is required.

The diet should provide energy and avoid the occurrence of maldigestion and malabsorption, caused by the undigested particles that are fermented by colonic bacteria resulting in exercise-induced diarrhea.

Nutraceuticals

Oxidative stress is also part of the exercise equation. Therefore, the use of nutraceuticals with antioxidative and protective properties could benefit working dog performance.

Many of them have multifactorial effects that could benefit a specific task, such as zeolite as digestive system protectant, prebiotics (FOS, MOS) to prevent dysbacteriosis, and EPA and DHA omega-3 fatty acids that have proven anti-inflammatory properties benefit the olfactory acuity, and have an impact on learning capabilities.

Empty stomach

To conclude, the diet should be formulated using ingredients with a high biological value to ensure maximum digestibility. It is also important for the manufacturer to provide detailed guidelines to adjust ME energy requirements based on daily workload and adapt the timing of feeding to the exercise regime to ensure an 'empty stomach' during the exercise. ♦



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Working dogs – a growing segment in the pet industry



With an ever-increasing number of working dogs, this segment offers interesting opportunities for innovative solutions in the field of nutrition and accessories. Especially now that the demand for psychiatric assistance dogs is growing.

Every dog is a working dog

Working dogs are dogs with a special task. However, from a cynological viewpoint all dogs are working dogs. Over time, we humans have created more than 300 dog breeds: each breed with a specific purpose and characteristics and bred to perform specific tasks. Although a companion pet dog also has its inbred work needs, their ability to perform tasks depends on the breed. In fact, companion dogs have a less inherent need to work than, for example, sheepdogs and hunting or tracking dogs.

Special types of working dogs

For thousands of years already, dogs have fulfilled various functions for us humans. Starting with sheepdogs and hunting dogs, nowadays dogs assist us to carry out an increasing number of tasks. To name

but a few: dogs are used by the army, at airports, by the police, as search and rescue dogs in disasters and as assistance dogs to aid people with a disability. Based on experience in training such special needs dogs – and based on new scientific insights – it is expected that dogs will perform even more tasks in the future.

Already, thanks to their excellent sense of smell, dogs are being used to detect cancer. But, undoubtedly, the most important role of dogs will remain as companion animal for humans!

Working dogs in healthcare

We are familiar with assistance dogs that help people with a physical or visual impairment. Increasingly, however, assistance dogs are specifically trained to assist people with psychosocial disabilities.

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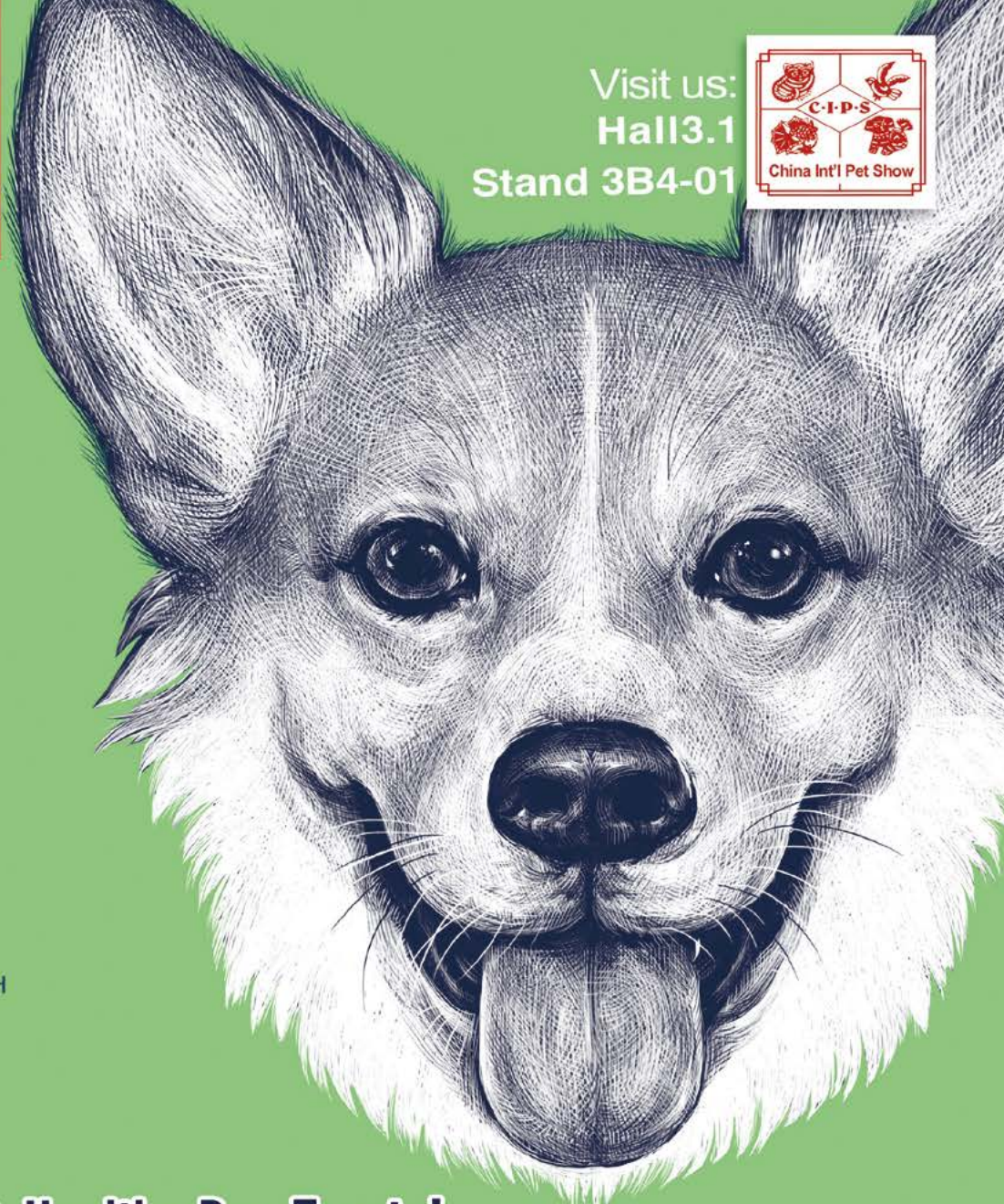
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Working dogs

Working dogs need physical and mental challenges – more so than companion dogs.

Scientific research has shown that when a person strokes a dog, it has immediate beneficial effects on their heart rate, blood pressure and the level of stress hormone present in their body.

Psychiatric assistance dogs are already successfully being used in numerous therapies with children and adolescents, including Animal Assisted Therapy and Animal Assisted Interventions. The dogs mirror a client's behaviour, leading to a process of recovery. Contact with the dog results in improvement in the psychological, social, emotional, behavioural, cognitive and physical functioning of a client. Psychiatric assistance dogs that help war veterans suffering from Post-Traumatic Stress Syndrome are also widely used.

What new developments are to be expected?

The most striking development is the rise in demand for detection dogs. Used to detect explosives, after 9/11 such dogs are now widely used to give the 'all safe'. A new phenomenon is the so-called whisper dog: trained to stay silent (and not bark) during work. Now that the benefits of psychiatric assistance dogs are widely recognised, it is expected that the demand for such dogs will increase, as will the demand for sniffer dogs to detect cancer.

Focusing on the specific needs of working dogs

Working dogs need physical and mental challenges – more so than companion dogs. Providing such challenges makes for a stronger dog. It is important for a working dog that it is rewarded for its efforts. It makes the dog even more motivated to do well. Of course, mutual trust and motivation to fulfil a task together are also important. And, at the end of a working day, a dog needs well-earned rest.

As demand for working dogs grows there are many opportunities for the pet industry to latch on to. Two of the most interesting are:

Food

Working dogs, whatever work they carry out, require food with a high energy content: 3,700 - 4,200 (kcal/kg). It is important that food is easily digestible so that the digestive process does not impair the dog's performance. The most essential ingredient is protein. Ideally, the highest possible percentage of animal proteins is supplemented with vegetable proteins. Of course, protein source quality is key: food that is rich in animal protein and fat supports a dog's endurance. The demand for such innovative, high-protein dog food will increase. However, manufacturers looking to market high-protein dog food successfully internationally, must be able to offer an affordable solution.

Accessories

This lucrative market is especially interesting where working dogs are concerned. After all, these dogs need a vast array of tailor-made accessories, such as covers, harnesses, shoes and much more.

This article was written in cooperation with Jeroen Oomen, Cynology Netherlands and Frank de Koning, Champ Europe. ♦



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Working dog wearables The impact of professional dog equipment on the consumer market

Working dogs – or simply put ‘dogs with jobs’ – have a more demanding task compared to the average pet canine. From assistance to exploratory searching, defence and protection, working dogs need equipment to keep them on task.

Harnesses

Service or assistance dogs require harnesses to guide humans, detection dogs require visibility, military dogs may wear bullet proof wearables and all of these harnesses need to enable, rather than hinder, the dogs doing their job. Padding is necessary to prevent chafing and hernias; weight will tire the dog.

Thus, a lot of research goes into the design: manufacturer K-9 has a range of patrol harnesses to search and rescue, along with the more traditional

tracking-style harnesses, some with a ‘grab handle’ on the back to protect the dog further with the help of the handler. Colours reflect – sometimes literally – the style of work, from bright orange, olive drab to black.

In what way does the consumer market benefit? An easily-visible dog is a bonus for walks outside, along with visible identification (large lettering along the side). Also, comfortable harnesses that are hard-wearing are replacing the flimsy cosmetically designed versions.

Working dogs

Locator technology

The cost of a trained working dog is high. For instance, the cost to train a police dog is estimated to be up to \$29,000 (€27,000). That means that losing them would be a disaster.

Search dogs are often equipped with GPS tracking devices, also available now in the consumer market. These can track a dog from a range of up to 9 miles (14.5 km). Rather sadly, some include shock training devices; these are certainly not to be encouraged in the consumer market – and are banned in some countries.

Cameras

Head and collar/harness cameras are another popular innovation. Ever wanted to see what the dog's eye view is? From a working perspective, this can be important for locating lost persons or evidence-gathering. But the popularity of the Go-Pro for sports and outdoor consumers has led to a dog-harness that will hold the same camera.

Flashing lights for harnesses and collars, as well as reflectors, allow for dogs exercising and working in low light or even darkness, without fear of losing sight of them. On the other hand, who is the one really needing it? With a dog's excellent low-light vision and sense of smell, it is unlikely they will lose their human companions!

Winter and summer wearables

Garmin produces an electronic temperature sensor, another excellent innovation for dogs' well-being, since keeping a dog cool and comfortable can be a matter of life and death. Cooling coats and blankets, containing a non-wetting agent or made from special absorbent fabrics that hold water without soaking the dog, mean hotter conditions can be tolerated more easily.

Hard-wearing dog paws see the need for protection against extremes of heat and cold. The American

Keeping a dog cool and comfortable can be a matter of life and death.

Kennel Club (AKC) recommends a wide range of dog boots to safeguard from sore paws. Textured soles for traction and water resistance, and flexible and easy Velcro straps mean that any dog can wear them comfortably.

Toys for working dogs

The way to 'pay' any dog for a job well done, is often to play with them. Working dogs are no exception. Toys can be used to train a dog to search, to chase and retrieve, or simply to recall a dog away from a running criminal. Such toys have to be easy to pocket and throw, and need to be durable so they can be used reliably and safely. Working dog favourites include strong rubber balls on ropes, softer flying rings/frisbees to avoid mouth damage, remote ball launchers and even the newer 'Manners Minder' training devices. These are a remote form of reward, where a simple press of a control delivers some of the dog's food wages.

Welfare and working dogs

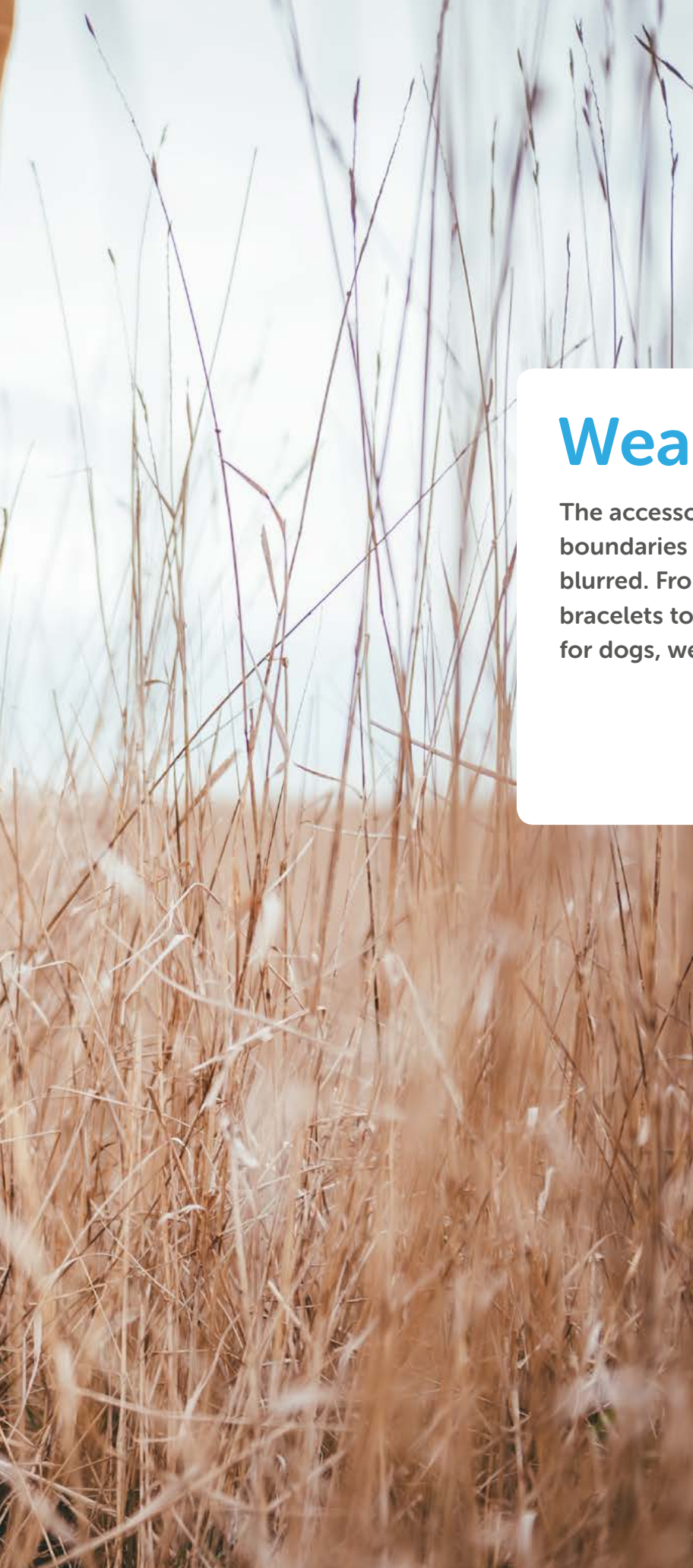
It is worthwhile remembering that a working dog is a highly trained animal, sometimes bred for purpose too. All dogs need training to accept the equipment, so that they actively enjoy having it on their bodies. However, with innovation comes education of both owners and suppliers as well. Next to ensuring that demand is met successfully, a responsible use of these exciting new innovations in dog technology is key. ♦



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Wearables

The accessories sector is where the boundaries between pet and owner are most blurred. From collars that transform into bracelets to the equivalent of smartphones for dogs, we identify the emerging trends.

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Unlocking the secret life of pets

The growth of wearable tech is no longer confined to the human world and is making inroads into the pet market. Where is it headed?

Pet smartphones

Pet wearables are attracting more and more interest and providing increased insight into the everyday activities of cats and dogs in particular, recent research in the UK by AMA Research has found.

Centred on collar-based devices, wearable tech for pets has the potential to transform what was previously only simple collar to a full connected digital device – essentially a pet smartphone! While the collar and leads sector accounts for only a small share (5%) of the £1 billion (\$1.25 / €1.13 billion) overall pet accessories market in the UK, wearable tech could prove to be the new product that transforms the existing sector.

Remote monitoring

Humanisation of pets is a key factor driving the market, with pets increasingly viewed as members of the family and therefore benefitting from more 'inclusive' products which increase the potential for greater interaction. With many pet owners out of the house on a daily basis, leaving pets alone for long periods, remote monitoring of pets via GPS devices and cameras is increasingly servicing the needs of some owners; especially the need to have some interaction with their animals, even though they are some distance apart.

The Internet of Things continues to extend mobile and app based remote monitor technologies into everyday

aspects of our lives, such as heating controls and home security, and apps are now viewed by many as essential to everyday activities. The development of GPS collar-based tracking systems is a key example of this trend, with organisations such as Tractive, TKStar and Pawtrack developing products that allow owners to monitor the location of their pet. Some systems also have geo-fencing facilities, with a tracker option that provides a direct aid to finding 'lost' pets.

On-the-go video

Collar-based cameras are also seeing growth. EYENIMAL by NUM'axes for both cats and dogs allows owners a pet's eye view of their world and their daily adventures. In addition, a number of suppliers have also introduced harnesses, mainly for dogs, that securely accommodate smaller versions of mobile, on-the-go action cameras such as GoPro.

Connectivity of devices also means that pet owners can easily upload and share video clips of their pets in action, with some pet owners now having social media sites for their pet as well as themselves.

Health and wellbeing

Whilst many current products focus on the need for monitoring and remote integration between owner and pet, some wearable tech devices are also providing enhanced capabilities within the health and welfare sector; in a similar way to those developed for the human population.

Products such as PitPat dog activity monitor not only have a collar mountable device but also include enhanced app features. These include personalised exercise programmes and weight and condition monitoring, as well as a rewards program and exclusive member discounts and offers.

The devices have the capability to provide enhanced information about the health and wellbeing of pets.

What this also means, is that these devices have the capability to provide enhanced information about the health and wellbeing of pets. The data from the tracking devices and on-pet cameras could provide a detailed baseline for what is normal for a particular animal. Tracking changes to these normal behaviours, such as reduced activity levels and increased frequency of urination, could potentially provide an early heads-up for underlying conditions which may have been missed by the normal observation of the owner, particularly as the pet ages.

The future of wearables

Pet wearables are only a niche sector of the UK pet accessories market at present, but one that commands higher average prices and has the potential for significant future value growth.

Looking to the future, wearable pet tech is likely to mirror developments in the human wearable tech field, and extend beyond the collars and harnesses sector potentially into the realms of intelligent clothing. As more suppliers enter the marketplace and average prices come down, some wearable tech devices for pets should become more attractive to a larger proportion of pet owners. ♦



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Wearable pet tech decoded



Wearables are the new frontier of pet tech. What are the technologies out there and what's next?

Harnessing huge potential

The global pet wearables market is expected to reach \$3.5 billion (€3.2 billion) by 2025 (Global Market Insights) and the pet industry can expect 69% of millennials to track pets using tech connect devices in the future (IDTechEx).

Today's tech-enhanced pet wearables are divided into three segments: vests, collars, and harnesses. What separates them, and creates unique opportunities for customers, is the technology behind them.

Tracker tech

All smart wearables provide tracking. This is achieved through one of three types of technology, each with pluses and minuses.

1. GPS – pings a satellite to pinpoint pets' exact location and then forwards the data to owners via a sim card. This enables the storing of pet data, so it is ideal for monitoring health and activities.

2. Bluetooth – uses short-wavelength UHF radio-waves to locate within an immediate range. It is lightweight since it requires little power, which also means less charging. Users in highly populated areas, say London or New York, could possibly extend their reach via crowdsourcing communities on various platforms.

3. Radio frequency – messages are sent between a handset and a tag. The strength of transmission received from the tag to the handset is used to indicate distance as well as direction. Traditionally used for hunting dogs and suited to owners who like roughing it and going off the grid.

AI is coming

An exciting development in wearables is the integration of artificial intelligence (AI). Sensors in wearables collect data which AI learns from to create algorithms that can compare information about the pets breed, age and lifestyle, to find out if pets are truly living their best lives.

Wearables

Companies such as Anaxeos are already working to create the second generation of these smart wearables. This generation uses algorithms that analyse each dog's individual data points and translates it into insights about the pet's potential for heart issues, food/calorie consumption needs, physical pains, need for recovery, or possible illness based on its specific lifestyle.

Big data, safe data

One very important consideration for wearable companies building their offering, is the need to ensure transparency around data. While pets wear the device, the owner's data is also collected. According to a Bristol University study, data captured on the pet owner is four times higher than that captured about the pet, which could be used to unknowingly build

profiles on users. For Europeans, GDPR should protect their data, however, global data rights can still be compromised.

To win over pet parents, wearables need to anticipate both their two and four-legged users' needs, creating more connectivity and conveniences in their IoT life. Now is the time for brands to invest in the right tech to reach this growing demand. ♦



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Beach art made by JBen for Zolux Group

Zolux stays focussed on market trends and customer needs and is now seriously taking into account environmental issues.

Background

ZOLUX Group began as a simple seed store in the centre of a Charente-Maritime town in France, back in 1933. Madeleine and Fernand Haurit, the great-grandparents of the family who still runs the business today, started out by selling agricultural seed, then bird seed and grain for small animals. The business grew year after year, went on to specialise in pet products, and is now a key player in the pet market.

Today, the company describes itself as 'creator-manufacturer-distributor' of supplies for cats, dogs, small animals, fish, birds and reptiles, and its 5,000-item catalogue includes innovative and

distinctive products, along with basic essentials, marketed to over 60 countries. In 2012, the group decided to focus also on healthcare and acquired Laboratoire Francodex, which specialises exclusively in animal health.

Creative ideas and concepts

Zolux has a passion for creativity and innovation. It is committed to bringing new ideas to the growing pet market and not only using price as a sales pitch.

The idea is to propose innovative concepts to stores – especially the bricks-and-mortar ones – and to consumers, together with a fast and precise service.

Complete in-store concepts have proven to generate more traffic and purchase decisions in stores, sometimes on cross-category lines. This adds value to the consumer experience and, in turn, to stores sales. Products are not just displayed on shelves, they are integrated within a consistent range and enhanced in a way that consumers can easily imagine having them at home or using them with their pet.

Made in Europe

Some 80% of the group's sales are from products made in Europe, in the company's own factories or in those of close partners. The main manufacturing base is in the north of France.

Wearables

“This is a structural axis of development,” says CEO Matthieu Haurit. “We have invested a lot in manufacturing over the past 10 years, for several reasons: it allows us to better control quality, as well as production costs, and to bring solutions to partners who are asking for private labels. But more importantly, it is a concrete and immediate way to limit our carbon footprint, because our main markets today are European ones.”



Caring for the future

Natural and organically certified products, respectful packaging and recycled materials are increasingly a part of the eco-conception of products. Dog and cat snacks have been available in bulk for several years already and there are ranges of organic snacks for cats, dogs and small animals. A range of organic shampoos will soon be launched by Laboratoire Francodex, made in a production unit certified for organic cosmetics, respecting the Edencert label standards.

Packaging reduction is also a deep concern, as well as finding closer suppliers. The company's teams are trying to find solutions to replace plastic in packaging, say Category Directors Stéphane Leprêtre and Emmanuel Huret.

An international vision

Meanwhile the company has been selling internationally since the early 2000s, with an export team that now totals eight. The brand can be found at professional fairs all over the world, either as a direct exhibitor

or sharing a booth with local distributors. The company has nine distribution platforms across Europe, a subsidiary in Poland since 2006 and another in Italy since 2009. And a new subsidiary is under preparation for 2020, according to Export Director Grégoire Wolski.

Engaging end consumers

The best way to make pets and their owners happy is to better understand their needs and desires. The company uses social media to dialogue with end consumers every day and wants pet owners to participate in their product development. Marketing & Communications Director Claire Brice explains the company has created a community of pet owners called 'Zolux Tribe', who give reviews on products at different stages of their development. This helps the company's R&D department make the right decisions when needed. ◆

◆ **Zolux Groupe**
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Wearables. Blurring the boundaries between pet and owner

How is the evolving relationship between humans and animals changing perceptions and habits in everyday life and, in turn, influencing pet wearables trends?

More than accessories

The relationship between pet and human is in constant evolution. Today they increasingly share living, urban, recreational, and especially social spaces, and this has led to a significant change in the perception of the pet's accessories, which have become real, trendy articles.

The close connection between human and pet is evident, indeed, even in the small choices of everyday life. For instance, choices that reflect the need to combine the practical needs of puppies with the aesthetic taste of the owners, reveal a willingness to identify the pet as a part of the self.

It plays out in everything from coordinated accessories to stylish garments that can be matched to pet and owner, designed in respect of the animal and its needs.

Coordinated style

As the boundaries between pet and owner become increasingly blurred, the two become blended and enriched in style and creativity. Leads become bracelets or turn into shoulder bags, personalised collars are made in precious materials with jewel inserts. Coordinated identification tags seem to sanction and celebrate a mutual belonging. And bags are no longer the exclusive territory of our personal effects, but ready to welcome everything our pets

Wearables

may need during the hours spent with us outside the home.

The range available on the market is almost infinite and ready to satisfy every trend: from the metropolitan refined to the sporty chic, from the street wear to the boho.

Aesthetic combines with function

Objects combine a captivating aesthetic with the necessary function. There are water bottles that rival our own coffee thermos, cookies holder accessories that hook to the bag like pendants, and containers for wet wipes that, let's face it, we wish were for us. Even the necessary to manage the dog's droppings is the result of a precise choice. All of these are outward indicators of the taste of values and the status of the owner who chooses them.

Wearable wellbeing

Another trend in constant growth sees the concept of wearability closely linked to that of technology. Digital devices that attach to the collar are now being joined by anti-anxiety clothing, designed anatomically to have a calming effect, dressing our puppy with wellbeing.

All these different and complementary aspects combine to make the concept of wearables today, one that translates intrinsic characteristics (values, status, habits, orientations) into a unitary and recognisable lifestyle. ♦



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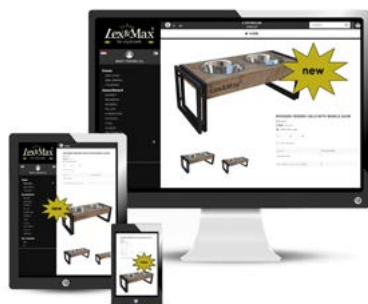
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Hot fashion trends for 2020



As pet accessories trends closely mimic those of their owners, it pays to keep a finger on the pulse of human accessories trends.

Blade Runner blue?

Trend colours, materials and shapes reflect the transitions that are taking place in our lives and this coming season is no different. Both earthy and human complexions will make their entrance, as will futuristic colours and structures. How does a shade of 'Blade Runner' blue or 'clay red' sound?

Say no to...

...real fur, pollutants, cultural appropriation, gender inequality, fast fashion and fast food. Not just by saying or expressing it, but by actively doing it. Take it as a kind of fasting.

Last season the focus was on making a statement, so matters like sustainability and gender equality have become part of the status quo more and more.

Now, not wearing or using specific items or proclaiming your point of view will become the statement instead showing it off. The activism element seems to have moved to the background. As a result, colours like yellows, that are gender neutral, make their entry followed by quiet pastels. These are accompanied by simple sustainable designs or ones with voluminous shapelessness.

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56234	ARC 46	46L	40L X 34.5D X 40CM H	100L/HR	12.5W	2.5W	10W

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More modesty

A variety of browns will be the colour of the coming years. Beige, bronze and terracotta come to mind, which is mainly due to the retro and 70s trend, but also the modest fashion trend. And now that brown is the new black everything looks different. Warmer, but more neutral.

A trend like this is accompanied by traditional fabrics and shapes. From capes to folklore, timelessness is what is important in products. There is no fashion, and clothes and accessories can be worn in whatever time or age. Like how clothing was and is still worn in some cultures. Folklore can have a connecting vibe, because it can be found in any culture in one way or another. It is sober, but gives off a feeling of nostalgia.

Futuristic

As parts of collections are based on earthy colours and materials, as a form of counter-movement to the coming apocalypse, futuristic colours like blues and shiny products are also seen. The latter could be seen as a form of escapism, a preparation for the journey into space and towards new technologies that come at us at an insane rate. These two movements will appear as a combination, as was seen in the images of the future in 80s movies.

So, all in all, these are exciting times with a lot of challenges in the industry, but accompanied by great opportunities that contribute to change. The customer is aware, and armed with the proper knowledge and skills to partake in a better world with beautiful items of true importance and permanent quality. ♦



Marlou van Teunenbroek

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Obrigado

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Using the best of what nature gives

Established in 2007, Bentaş Bentonit has since focussed its business efforts on producing natural cat litter. It now exports its clumping cat litter – made from white bentonite mined in Turkey – to 51 countries worldwide.

Best odour and fluid absorption for cat litter

To produce hygienic and easy-to-use cat litter for both cats and their owners, Bentaş Bentonit combines high-end technology to the best of what nature has to give: clay-like bentonite. There are different types of bentonite with different dominant elements that provide this raw material with varying properties.

High-end calcium bentonite has the best capacity to absorb fluids: as much as 4 to 5 times its dry mass. Besides the higher fluid absorption capacity, its odour absorption properties are also better than those of, for instance, sodium bentonite. Different bentonites also vary in colour: with a whiteness of anywhere between 75% and 92%.

All-natural

Almost 90% of white bentonite reserves in Turkey are to be found in the Ordu, Ünye and Fatsa regions. With an estimated 45 million tons of bentonite still to be mined, the supply of this raw material for cat litter is guaranteed.

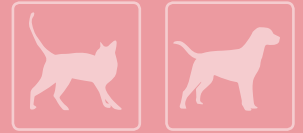
The Bentaş Bentonit plant is to be found in Fatsa, close to the mining area. The plant produces an average of 300,000 mega tons of cat litter annually. The various types of bentonite are used to produce a range of cat litters, each with its particular properties and matching price.

Highest quality calcium bentonite used for premium cat litter comes from the mines found along the coast of the Black Sea.

Research and development

The mission of the company has always been to produce best quality cat litter. Supported by their Research and Development laboratory, all products have to comply with strict quality parameters. In fact, none of the 550 tons of litter produced daily leaves the plant without having been subjected to six different quality tests. The laboratory also develops bespoke cat litter that meets all requirements set out by clients. ♦

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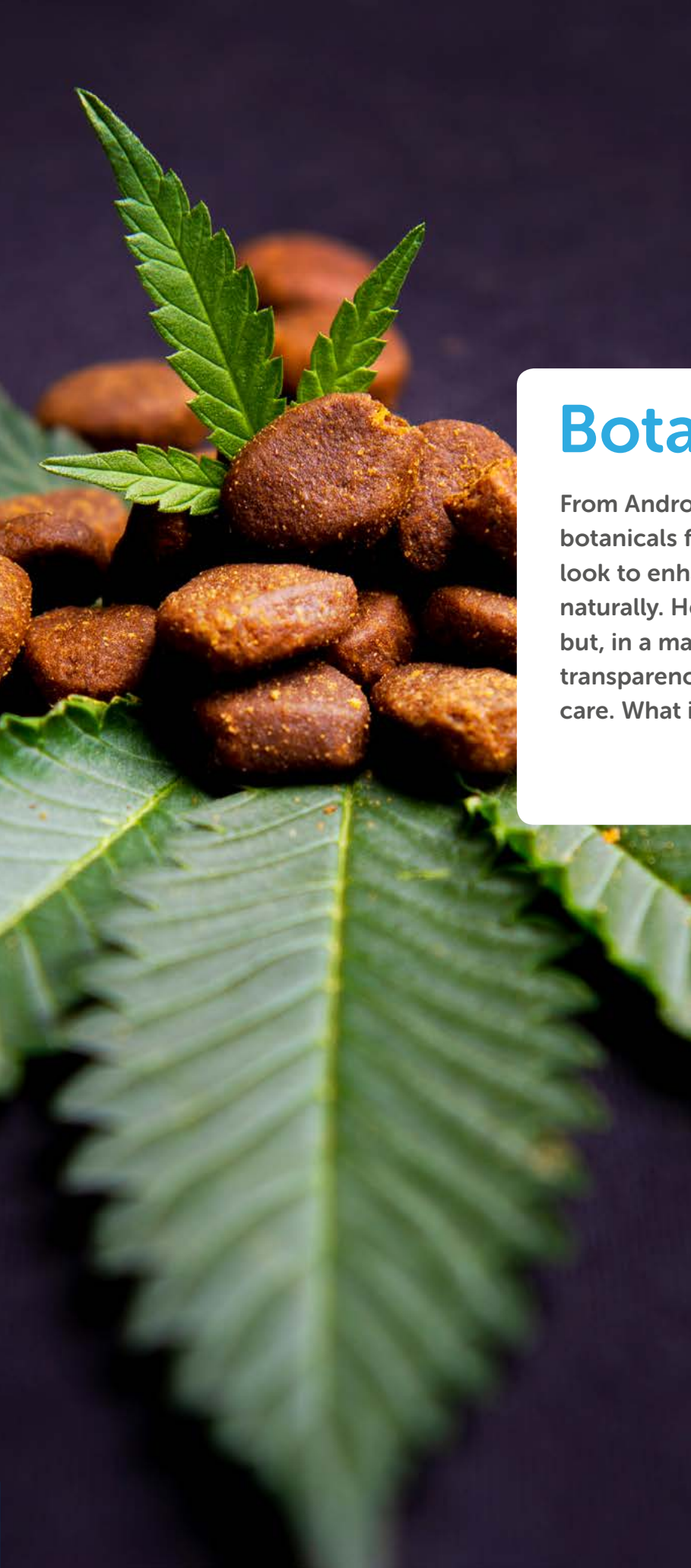
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Botanicals

From Andrographis to CBD to turmeric: botanicals for pets are blooming as pet owners look to enhance their pets' wellbeing – naturally. Health and wellness claims abound but, in a market that also demands increasing transparency, pet food makers need to take care. What is the way forward?

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CBD: an emerging ingredient in Europe

Interest in CBD as an ingredient in pet products is growing in Europe. How can manufacturers navigate the still inconsistent regulatory environment?

What is CBD?

CBD, a cannabidiol, is a trending ingredient in the pharmaceutical, cosmetic and food industries. Unlike THC, this phytocannabinoid is non-psychoactive, and is studied for its effects on epilepsy and other movement disorders, anxiety, cognition, pain, and even skin conditions like eczema. Given the plethora of effects, it is not surprising that CBD is gaining more interest even from the pet industry, veterinarians and pet owners.

An emerging ingredient

In Europe and the US, an oral solution of CBD is approved as a medicine, an anti-epileptic, for treatment of epilepsy associated with Lennox–Gastaut syndrome in children or Dravet syndrome, a severe myoclonic epilepsy of infancy (SMEI). Although at this



moment there are no regulatory approved medicines for companion animals using cannabinoids derived from the medical cannabis plant in Europe, it seems like this will change soon.

Currently, a company CannPal is developing a drug candidate, CPAT-01, as a pain and inflammatory control for dogs, containing cannabidiol and tetrahydrocannabinol. It will be submitted for market authorisation as the first cannabinoid veterinary medicinal product (VMP) for companion animals in Europe.

Regulations still unclear

The CBD market is growing but, as the sales of CBD products increase, the industry is often confronted with conflicting EU regulations. CBD oil can be considered to be legal in most European countries, with different limits of THC prescribed by law – from the highest limit in Switzerland being 1%, to a strict 0% of THC allowed in Estonia, Finland, France, Ireland and Norway. However, legality of CBD is not a simple issue, especially in Belgium and Slovakia where it can be regarded as illegal.

CBD is usually sold in the form of supplements, oils or foods and these are not allowed to be marketed by using health claims, as there are no health claims relating to hemp or CBD that are authorised for use under Regulation (EC) No 1924/2006. Nonetheless, assertions of calming effect, pain reduction and insomnia treatment can be found all over the media.

Classified as a novel food

To further complicate the matter, the European Food Safety Authority (EFSA) recently reclassified CBD as a Novel Food, defined as food 'that had not been consumed to a significant degree by humans in the EU before 15 May 1997, when the first Regulation on novel food came into force'. According to EFSA, this means that 'before it may be placed on the market in the EU as a food or food ingredient, a safety assessment under the Novel Food Regulation is required'.

Thus, manufacturers in the pet industry wanting to use CBD products would be wise to apply for novel food authorisation to their member state authorities and enlist the help of hemp/CBD legality experts to navigate through the jungle of inconsistencies with more success. ♦



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CBD: opportunities and challenges in the US market

CBD has introduced a new and exciting ingredient to the supplement industry. How is the market developing in the US?

Growing interest

Pain control in veterinary medicine is of great concern as the industry prioritises alleviation of discomfort. The US pet population is aging, bringing arthritis and other degenerative joint diseases, as well as cognitive issues.

CBD, or cannabidiol, holds the promise of assisting with many conditions including discomfort, inappetence and nausea, and perhaps nervousness and behavioural issues. There is growing interest not only in the veterinary medical community but also from the public in general.



Why this interest? For years we have known that cannabinoid receptors are found throughout the body and impact a number of physiological processes, including behaviour, appetite, memory and pain. Many of these receptors are found in the central nervous system, which may explain the claimed positive impact CBD has on a pet's state of wellbeing. With the loosening of legal restrictions, these products are readily available, and consumers are eager to benefit from the product.

Regulatory issues

However, as the US market develops, there are a number of regulatory issues. The Agricultural Improvement Act of 2018, also known as the Farm Bill, legalises the use of hemp, but the ingredient remains controlled at the Federal level.

Supplements are on the market, but veterinarians are not permitted to suggest or recommend their use for their patients.

Moreover, following the FDA approval of Epidiolex in the US as a prescription medication, it appears that further new cannabis products may be processed as a new drug, rather than a supplement.

Unsubstantiated claims

Meanwhile, because the potential market is so large and there is so much interest, some supplements of dubious quality, and that may not meet label claims, are coming to market. This includes not containing the amount of CBD stated on the label, having more than the permitted 0.3% of THC (the psychoactive chemical in marijuana), and potential contamination with solvents as well as biological agents.

Another risk is the lack of research on where the product may best be utilised, what optimal dosing is and what the potential side effects are.

More knowledge is welcome

Currently the supplemental use of CBD is generating incredible interest as well as opportunity, both with health benefits as well as acceptance in the general population. There are many questions that need to be answered but with an upswing in research more knowledge of how best to utilise the product will be welcome. ♦



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Blooming botanicals

Botanicals for pets are on the rise, which is no surprise as the market for botanical supplements for humans is booming. But pet food brands still need to prove their added value.

Growing popularity of botanicals

Natural products have never been more popular – both for pets and their pet parents. Future Market Insights estimates that the global market for food botanicals will reach over \$1,500 billion (€1,367 billion) by 2026. And, since 2015, the popularity of internet search queries on botanicals has grown exponentially.

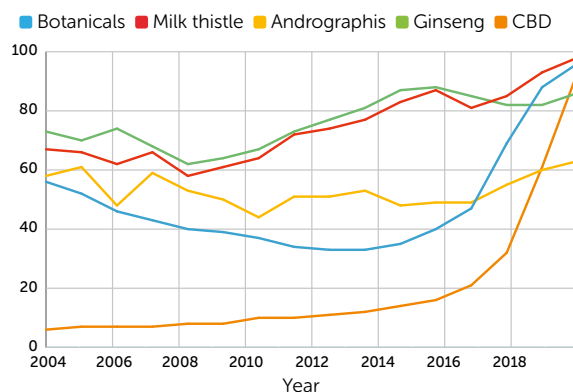
This popularity is due to a greater awareness by consumers about how diet relates to health, and part of this trend is looking back at natural remedies that have been around for thousands of years. An increase in botanicals in pet food to enhance pets' wellbeing is a natural progression.

An analysis of search trends shows common botanicals used in pet food – such as milk thistle, andrographis and ginseng – are gradually increasing in popularity, while CBD has seen a hike of increased interest, starting in 2016. The popularity of the generic search term 'botanicals' has never been as high as right now. This trend suggests promising opportunities for the pet industry.

More data needed

"Botanicals have a growing place in a healthy pet diet", notes Professor Mike Dillon, expert on the role of medicinal plants and herbs in pet wellbeing. "However, it is essential for consumers to understand what botanicals are beneficial for their specific pet, what is the right dosage and what is the underlying basis on which they are safe to use." This means increased pressure on R&D, marketing and packaging teams to create educational studies, campaigns and packaging around these trending ingredients.

Popularity of search terms in Google



In 2014, at a conference on botanicals in Denmark, experts identified the need for more data on the usage of botanicals for human health purposes and called for harmonisation in the collection of international studies on botanicals for consumption. However, fast forward five years and it seems that this gap in information is still not filled.

The next step for botanicals

In a world which is becoming more transparent, pet food brands have the responsibility to deliver honest products. Milk thistle, ginger, garlic, turmeric, ginseng and many other botanicals have proven health benefits for all types of pets. However, there is currently very little reliable data available for pet owners to base their decisions on. It is now up to pet food brands to prove their products' value and create clear messaging. ♦



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Improving wet cat food palatability

AFB International's strategic initiative to improve the palatability performance of wet cat food.

Premiumisation of wet cat food

The humanisation trend in pet food presents opportunities and challenges for cat food manufacturers. Cat owners are increasingly willing to spend more on their cats, as they are viewed as family members. As a result, many are demanding tailored nutrition, and are also scrutinising ingredients more closely. This has led to the launch of more premium products, especially in wet cat food.

Retailers and manufacturers have been able to grow revenue faster than the cat population is driving consumption of wet cat food. As shown in the table, kilograms sold is flat to declining, while retailer and manufacturer pricing continues to grow.

A challenging task

Making a palatable premium wet cat food is a challenging task. "Wet cat food palatability

drivers and detractors are much harder to understand due to more diverse processing conditions and formulations coupled with the inherent complexity of cat food palatability," says Han Laumen, Director of R&D at AFB International in Europe.

Always up for a challenge, AFB International launched a long-term, strategic initiative to advance its knowledge of wet cat food development and understand how wet cat food palatants can help deliver the palatability performance that owners expect from a premium product.

"AFB created a dedicated global team to expand its expertise and accelerate its product development efforts to bring palatant solutions to the wet cat food market," says Punya Mohapatra, Senior R&D Manager at AFB International in North America. These efforts included:

- Intensive collaboration with innovation partners to increase the speed to market
- Data driven product design to generate hypotheses in order to understand the drivers and detractors of wet pet food
- Multiple pilot plant trials to identify processing parameters that contribute to palatability
- Industry benchmarking to understand the wet pet food landscape
- New feeding and behaviour trial methods to assess feline palatability

Continuing this strategic initiative, AFB welcomes opportunities to collaborate with wet cat food manufacturers on a solution that improves palatability, using their own unique processing conditions and formulations. ♦

(Western) Europe wet cat food growth

	2015	2016	2017	2018	2019 (FC)
kgs	1.95%	0.17%	-0.89%	-0.40%	-0.06%
Retail selling price	3.25%	1.14%	0.29%	1.36%	2.11%
Manufacturer selling price	3.28%	1.13%	0.23%	1.25%	2.03%

Source: Euromonitor



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Luscious CHINA
China pet food manufacturer

Pet treats manufacturer since 1998 with 250,000 sqm.
Own labels: Luscious and OEM.
All the raw materials are used from the standard slaughter factories registered by CIQ. The company has its own 20 chicken farms, 10 duck farms, 2 chicken slaughter factories, 3 duck slaughter factories.
The products are currently exported to the US, Europe, Korea, Hong Kong, Southeast Asia etc.

Shandong Luscious Pet Food Co., Ltd
doriswyx@hotmail.com
chinaluscious.com



Avantis Pet SPAIN
Pure holistic by Avantis

Pure is a new kind of food for pets, based on natural ingredients and holistic care.

The fresh meat used is suitable for human consumption and provides proteins of high biological value, greater digestibility, and all the essential amino acids.

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info@goldeneaglepetfoods.com
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Pet food inspired by nature

Dolina Noteci creates exceptional pet food for dogs and cats, reflecting the natural, meat-based diet of dogs and cats and taking into consideration not only the varied nutritional needs of pets, but also their taste preferences.

Premium pet food

Premium pet food is a rapidly growing segment of the market. Dolina Noteci's offer is intended for demanding customers, who follow the same criteria in choosing food for their pets as they do for themselves. That is: natural and well-balanced composition and with beneficial effects on health. The company uses the highest quality raw materials, modern technology and current scientific knowledge on animal nutrition.

A guarantee of quality

The pet food is produced in the most modern production plant in Europe. Most of the raw materials used in the products – including also GMO-free vegetables – are sourced from local suppliers and meet the quality requirements for foodstuffs intended for human consumption.

Moreover, all of the ingredients undergo a multi-stage control process.

The producer cooperates only with qualified and reliable partners, who have been supplying their raw materials for many years. Thanks to such standards, the company is trusted by the owners of many pet food brands in Europe.

Environmentally-friendly production

In implementing the system PN-EN ISO 14001:2015, Dolina Noteci has committed itself to continuous work in the area of environmental protection. Care for ecology enhances production safety and serves to ensure the highest quality of pet food. The company can guarantee that the products are created with respect for the natural environment, concurrently maintaining the highest quality and all its benefits.

Piper Animals

The company's flagship pet food Piper Animals offers five product lines, available in a wide range of flavours and in various packages, giving the purchasers an opportunity to choose pet food adjusted to the needs and taste preferences of their four-legged friends.

Distributors that share the company's commitment to quality and that are looking for innovative pet food products can join the company: Dolina Noteci is looking for distributors all over Europe. ♦

♦ **Dolina Noteci**
pstreich@dolina-noteci.pl
dolina-noteci.com

GlobalPETS Forum
22-24 January 2020
Athens, Greece





GPF Europe

Join us in Athens, for the most important network event for pet industry professionals, with the theme 'Get into the heart of the consumer'. It is not just putting the consumer at the centre, but also really understanding why they do the things they do. And who will be the winner of the prestigious GlobalPETS Forum Award 2020?

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GlobalPETS Forum
22-24 January 2020
Athens, Greece

Get into the heart of the consumer

The theme of this GlobalPETS Forum is: 'Get into the heart of the consumer'. A topic as relevant as ever, with emerging online channels and changing consumer shopping behaviour.

All these changes affect the way you do business with your supply chain partners. For continued success, you need to get from the mind to the heart of the consumer.

To help you with this, the event offers both network opportunities and an interesting set of speakers:



Terence Mauri is an outspoken game-changing speaker, ranked in the prestigious 'Thinkers50' list. What developments are there in the world around us? What is making the consumer change? How do we stay connected with them? Terence will ensure you own the future rather than being disrupted by it.



Jorg Snoeck sketches the many opportunities for a flourishing retail landscape in the future. Everything is changing and, when it comes to shopping, the consumer is now being offered many new choices. Obviously, this affects every single aspect of retailing, and that can be seen as both a threat and an opportunity. Jorg is an inspirational 'captain of retail' who has worked in the pet sector.



Ultimately, the changing consumer and their shopping behaviour will affect both the way you sell to them and the way you operate in the supply chain. So how is this changing your approach to the consumer and to b-to-b?



Tony Morris is an authority on the world of sales who can give you insights into this sales process. Tony shows companies how to increase their bottom line, build 'raving fans' and gain referrals. It is about changing people's beliefs and mindsets.

Today's business models are under pressure. But we do realise that we are stuck in past ways of thinking.



George Parker, founder of TheCreationGame®, helps you to reset your products, processes and yourself, to let go of what does not work anymore and to transform towards desired results. His eye-opening insights and techniques are the result of using his life, career and business as a laboratory for over four decades.



Is the consumer constantly comparing providers to find the lowest price? Or is today's consumer paying attention to other aspects too? What are the best pricing strategies? On the following pages, you will find a comprehensive article about this, from speaker **Evandro Pollono**.

Prominent pet industry speakers



Florian Welz, Zooplus CCO, will take us with him into the world of Zooplus. How does the company manage today's customers? How do they retain and get new ones? What do they know about their customers?

How do they get into their hearts? And how do they work with their suppliers to make sure they deliver what the customer needs?



The Bethoven group is one of the biggest pet retail chains in Russia, in the hands of **Levan Vasadze**. Levan will share with us how they are managing their brick and mortar pet shops combined with an online platform.



We cannot say it enough – it is important to cooperate throughout the supply chain to be able to deliver what the consumer really wants. How does a manufacturer/distributor see the consumer? Who better than

Tom Pletcher to share these insights with us. He has had a long career in the pet industry, most recently as former VP International Business Development at Blue Buffalo.



Michael Sapp, former Merchandising VP at PetSmart, will share his thoughts with us on how to get into the heart of the consumer in today's world: do we approach them as pet owner or pet parent? To build a

relationship, and to maintain it through omni-channels as a retailer, is a real challenge. What exactly are these challenges? How do we overcome them and what is the vital role of suppliers?

For further information: globalpets.community/forum

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PETS TODAY Pet Summit Grand Hyatt Athens Wednesday 22 January 2020

Pet Summit is a special one-day event organised by Pets Today magazine, the leading Greek b-to-b pet platform, and sponsored by the GlobalPETS Forum. It is to be held before the Forum begins. In the evening, Greek delegates will have the opportunity to meet and network with GlobalPETS Forum executives during an informal get-to-gather dinner.

What to expect?

The theme of the Pet Summit is 'Touch the consumer's heart'. Participants will hear from leading retailers and marketers about how to analyse pet trends and develop strategies, and how to create a consumer experience in their shop.

Today's consumers want it all: easy shopping, unlimited choice, unbeatable comfort, personalised service and value. They require this from the brands they buy, but also from specialised shops and trusted experts. The rules of consumer behaviour have changed, and the leaders of niche businesses have to successfully navigate these changing conditions. At the same time, technological development offers tools and techniques that provide solutions.

The event will showcase the latest industry trends and explore key consumer priorities. What are successful strategies that you could use to develop and expand your business? Specialist retail executives and industry professionals will share the ideas and knowledge that help them compete in this new customer-centric environment.

This is an amazing opportunity:

- to understand today's consumer and ensure that you have the competitive advantage you need in today's market.
- to attend an informal get-to-gather dinner and talk face-to-face with owners and executives from the global pet industry. It may well lead to your next business opportunity!

When and where?

The Pet Summit will be held at the Grand Hyatt Athens hotel on Wednesday 22 January 2020, before the GlobalPETS Forum.

At 19.00 there will be an informal get-to-gather dinner where participants from both events can network and intermingle. ♦

petstoday.gr

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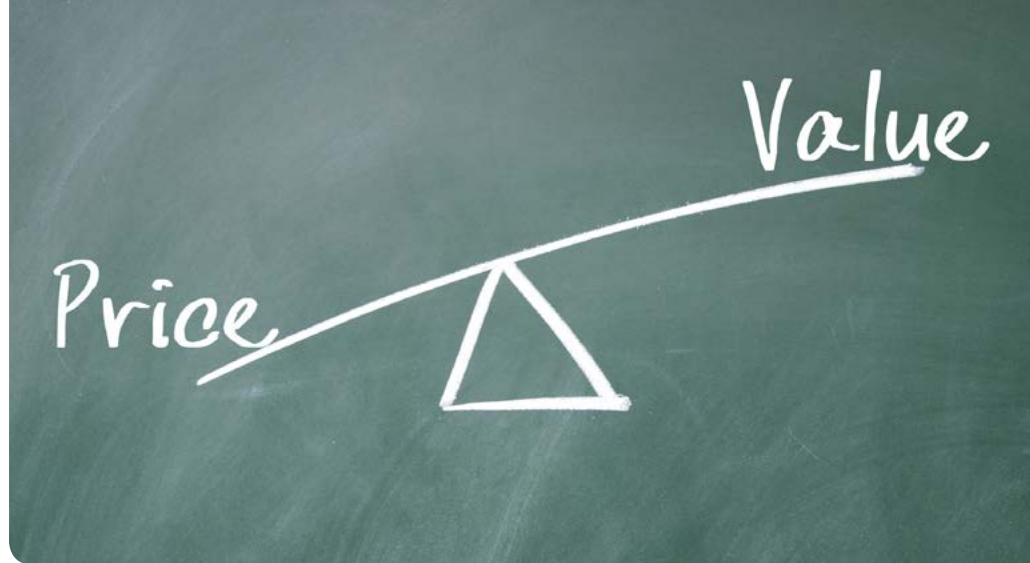
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The importance of pricing

Pricing excellence = increasing profits by optimising prices for your current portfolio + using pricing for value for your innovations.

Choosing an approach

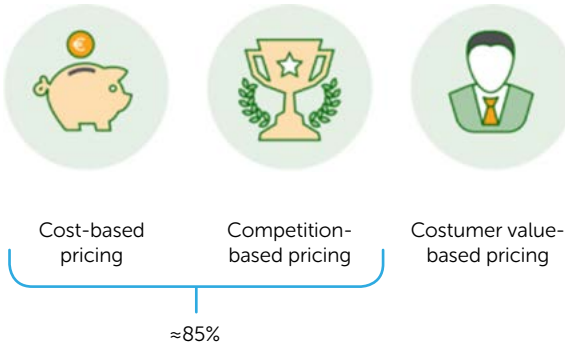
Pricing is the single lever available to marketers that yields the best short-term results. In spite of this, it is often overlooked. The price itself is considered to be something imposed by forces that cannot be controlled, with limited leeway and minimal impact. But as much as external factors – like competitors' prices and cost of goods sold – have to be considered, every company has the possibility to influence the final price, and doing so is in all their interests.

Six out of seven companies see price as production costs + desired mark-up, often mediated by average market prices, while leaders in all industries look primarily at the value to consumers. They apply value-based pricing when managing prices – and this may translate into having higher-than-average prices.

Effect of just a small price increase

Academics and empirical data prove that increasing prices by even a small percentage can impact operating profit by a much larger amount: usually up to tenfold. A better result than what can be achieved by most other often-used strategies, like cutting costs.

The three main pricing approaches

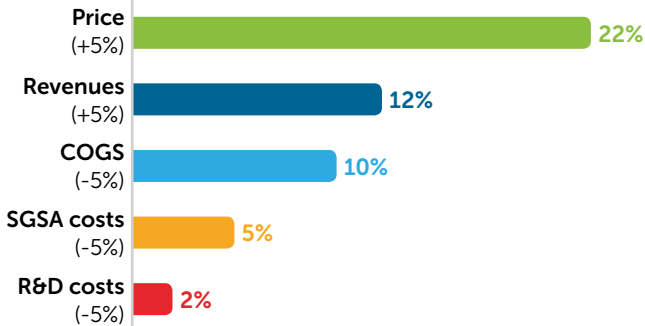


Value-based pricing

There are many techniques to increase/adjust prices. One is looking at current customers through the lens of value – hence the name ‘value-based pricing’. This could involve optimising the discount structure, segmenting customers based on psychographic features other than volume, or using psychological techniques. Considering the value to consumer is also necessary when launching innovative products, where the tendency is to undercut competition, hoping to quickly gain market share. New launches too often result in money being left on the table without capitalising on the R&D expenses incurred, leaving the innovative player worse off than before. Something that would not happen if value to consumer was properly taken into account.

Impact of price, costs, revenues on EBIT

(% improvement of EBIT)

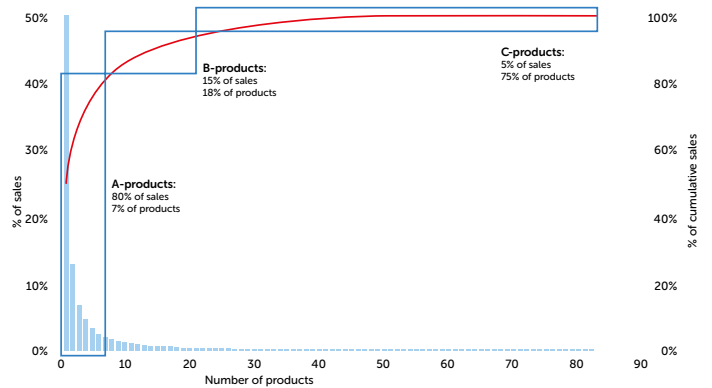


Impact on profitability of a 5% change to various levers

Analysis is key

Theoretical bases and techniques must be complemented with pricing analyses. These guide decision-makers with priority setting. A common method is to cluster products according to their contribution to sales or total margins in the so-called ABC analysis. A-products contribute to 80% of sales or margins, B-products contribute 15% and C-products 5%. The resulting insights are used for strategies such as ‘long-tail pricing’, that is increasing the price of C-products with very low margins. Another strategy is ‘key account pricing management’, where the company implements upselling initiatives on A-products for the biggest accounts.

ABC analysis and Pareto chart



ABC example of pricing analytics

Pricing is the strategic element which has the fastest impact on the bottom line. It can be the central tool to drive sales, market perceptions and profits for any company, no matter how competitive the industry. ♦



Evandro Pollono
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 hinterhuber.com

GlobalPETS Forum
22-24 January 2020
Athens, Greece



The GlobalPETS Forum Award

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

The winner has the right to use the special GlobalPETS Forum Award 2020 logo in their marketing communications.

Every five years we have the award redesigned. We are now proud to present to you the brand-new design: created from glass and aluminium.

Last year, Fish4Dogs (UK) was the deserved winner of the award.

Who will win
the GlobalPETS award
in 2020?



GlobalPETS Forum Europe

Dr.Clauder GERMANY



Dr.Clauder considers each and every customer to be part of its family. The company is successful because all its employees work together towards the same goals. Each customer is supported individually. Its high-quality product range, consistent transparency, loyalty and non-discrimination based on a selective distribution network create the ideal environment for long-term relationships and successful partnerships. Everyone at Dr.Clauder wholeheartedly lives by the company credo 'Responsible Pet Food'.

Kormotech UKRAINE



Kormotech has managed to become both market leader in its home country and one of the biggest pet food players in Eastern Europe. Quite an achievement, considering the challenges of war, occupation and an unstable country reputation. It has seen constant growth in its market, partners, employees and community. Kormotech needs all the support it can get to achieve its ambitious goals, with which it also hopes to boost the industry in the region.

Zolux FRANCE



Zolux is a fantastic mix: a solid family business set up in 1933, but also a 20-year-old start-up that has made changes to its DNA by heavily investing in R&D and brands, production and international distribution. Passionately putting customers first, it uses new channels of communication to create more opportunities. The mix is also one of cultures: different backgrounds, visions and generations with new social and environmental considerations. All that, in a very fast-moving world, where Zolux has been moving fast too!

Suzirya UKRAINE



In its 26-year history, Suzirya has proven to be a reliable partner for its customers as well as its own suppliers – leading European companies such as Spectrum, Vafo, Trixie, Gimborn, AquaEl, Canina and Vitakraft. Suzirya has achieved excellent results, both for itself as a pet company and for the country's pet industry in general, as it helps to develop its partners' brands. It sees continuous development as the eternal engine for further development.

Julius-K9 HUNGARY



Julius-K9 has an inner drive: customer-centricity. The company aims to create the perfect relationship between a dog and its owner. Supported by its organisational set-up, it focusses on understanding end customers, developing relevant innovations, and producing high-quality, reliable products. Julius-K9 uses the marketing techniques usually only adopted by large companies, setting it apart from many other pet accessory manufacturers. Its focus has been rewarded by experts (for example Red Dot) and by business results: 30%+ annual growth over five years.

Dingonatura SPAIN



Dingonatura was a pioneer in producing natural food for dogs and cats. The company's goal has always been to improve health and help extend life expectancy. During the 20 years since it began, Dingonatura has always adapted itself to the constantly changing pet sector. The prestigious position it holds today is thanks to the quality of both its products and its team, but also to its stable partnerships and its respect for the environment and the pets themselves.



Get into the heart
of the consumer

The sponsors of the GlobalPETS Forum 2020

22-24 January, Athens, Greece

We are honoured to have three sponsors for the 21st edition of the GlobalPETS Forum. All three are leading international companies with impressive track records in their respective segments.

Let us present them to you.



Vafo CZECH REPUBLIC

Pet's health as policy and principle

Producing food for pets with love to provide the best care

Vafo Group is a leading European super premium pet food producer. Its portfolio includes dry foods, wet foods, snacks and supplements produced in seven modern factories in Europe. This includes specific formula options such as fresh meat, grain-free, natural, bio, mono protein, novel and niche ingredients, and low grain concepts.

The top-quality leading brands Brit, Carnilove, HauHau, PrimaDog, PrimaCat, Christopherus, Profine, Sam's Field, Planet Pet, Canvit, Nutrican, Country Dog,

Freddy and Let's Bite are available in over 70 countries worldwide.

Vafo also offers private label services based on the success of its brands in Europe. This includes R&D, QMS, pilot production, palatability trials, design concepts and marketing.


Vafo Group
karolina@vafo.cz
brit-petfood.com



Protix THE NETHERLANDS

Food in balance with nature

Protix is market leader in circular, natural and sustainable proteins from insects.

Insect-derived nutrients are the most environmentally-friendly animal proteins. Protix uses food waste as a food source for the black soldier fly larvae. These larvae have a high protein and fat content. The black soldier fly is ideal for pet food purposes because of its nutrients, amino acid profile, functional properties and structure-forming capabilities. It can be used as the only protein source in many applications.

Protix is growing fast. The company recently opened the largest insect farm

in the world (15,000 sqm). It includes all aspects of the cultivation process: from egg to end product. The process takes place in a controlled environment and is highly automated with data systems, robots and climate control, using state-of-the-art technology and science.



Protix
roel.boersma@protix.eu
protix.eu



Julius-K9 HUNGARY

Customer-centricity as an inner drive

Julius-K9 aims to create a better relationship between dog and owner.

Julius-K9 was founded in 1997. It is now market leader in many EU countries and its dog equipment for work, sports and recreation is sold all over the world.

Since its launch, the JULIUS-K9® brand has become a trendsetter in the dog harness sector. Its award-winning IDC® Powerharness is a saddle harness with interchangeable custom patches. The design is based on locomotion research findings, and its easy applicability and safety features meet the challenges of busy urban life.

This scientific approach has recently led to another revolutionary product: the 2019 Red Dot Award winner IDC®LONGWALK harness. Designed for leisurely walks, its integrated Duo-Flex System minimises the harmful effects of leash jerks and forced shoulder movements.



K9-Sport Kft
info@julius-K9.hu
julius-K9.com



Montego Pet Nutrition SOUTH AFRICA Harnessing the African Sun

With average sunny daylight hours reaching up to 70% in South-Africa, it was the natural route to follow when Montego upgraded their facilities earlier this year. They included a solar plant that replaces over 24% of their annual conventional electricity consumption. Combined with environmentally friendly production, quality ingredients and strict HACCP controls, this ensures that this family-owned manufacturer remains a favourite in their markets.

Montego Pet Nutrition (Pty) Ltd
info@montego.co.za
montego.co.za

ArtAkua TURKEY High quality fish food

In 2001, Nektar Yem Ltd Sti was established with the aim of supplying high quality and specific feed for small creatures in the aquaculture industry. After 8 years of importation and distribution of fish feed, in 2009, the company chose to invest in a new technological project in order to produce and launch fish food by transferring its extensive knowledge and know-how into the ornamental fish food and aquaculture feed production under two brands:

- ArtAkua Fish Food – for ornamental fish
- Nektar Feed – for aquaculture industry

Nektar is manufacturing specifically formulated aquaculture and ornamental fish food for a variety of species (more than 30 types ornamental fish food) with a unique production technology. The fish foods are designed according to feeding habits of the fish and consist of special raw materials such as krill meal, shrimp meal, algae and yeast.

NEKTAR YEM VE KATKI MAD. GIDA HAYVANCILIK SAN. VE TİC. LTD. ŞTİ.

info@nektaryem.com.tr
nektaryem.com.tr





Passalis GREECE

A better world for pets and people

Passalis is sponsor and organiser of the pet retail tour in and around Athens on Wednesday 22 January 2020.

Quality products = well-being

When brothers George and John Passalis founded their import and distribution company for pet nutrition and accessories in 1990, they felt strongly about pets being equal members of the Greek family. Their vision has always been to provide high quality pet food that would best support a pet's health and well-being.

Based in Athens, Greece, and with offices and warehouses in Thessaloniki, the company supplies quality pet products through a network of selected retailers. Passalis continuously invests in products and services that give real value, plus a

competitive advantage for the shops who sell them.

The company today

Passalis continues to successfully develop and grow – the result of hard work and true dedication to the vision of the founders. Today, it has 59 employees and is one of the leading suppliers of pet products in the independent retail sector. The company's pet sales division is a team of twelve, who handle more than 4,000 products including nutrition, snacks, accessories and cat litter.

Certified since 2003 for its quality system (EN ISO 9001:2000), the company has over

950 Greek customers and 1,100 points of sale in three different segments: pet shops, vets and breeders. Still 100% family owned, Passalis works closely with customers and suppliers, representing a wide range of leading brands.

Passion for pet welfare

Pet business changes continuously. In order to succeed and grow in such a dynamic environment takes hard work and a lot of passion. For 30 years now, Passalis has demonstrated this, not only in delivering quality products but also in helping animals. Adoption plans and close collaboration with animal associations and vets are a main focus for the Passalis team, always driven by the founders' vision of a better world for pets and people. ♦

♦ **G & J. Passalis SA**
info@passalis.gr
passalis.gr

Important milestones

- 1990** Company founded, started with pet nutrition
- 2001** Construction of northern Greece distribution centre
- 2007** Establishment of pet sector team
- 2012** Launch of accessories division
- 2016** Launch of exclusive nutrition
- 2018** Further launch of vet nutrition lines
- 2019** Restructuring and expansion of sales team





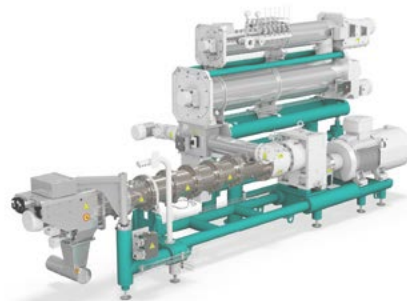
Austria, Germany and Switzerland

As the biggest pet retail chain in Europe comes up to its 30th anniversary, we hear from businesses and analysts about the past and the future. How does a shop become more like a specialised community centre? And why are ancestral foods in fashion again? Learn about developments and trends in the German speaking countries.

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www.event.buhlergroup.com/single-screw-extruder/



Interview with Fressnapf Group CEO Torsten Toeller

From shop to 'local community manager'
in a new business eco-system

The pet retail landscape needs to change to create solid foundations for the next stage of growth. Europe's biggest chain is the Fressnapf Group, celebrating its 30th anniversary in 2020. What is Torsten Toeller planning for the company he founded?

Successful 29 years

Since its launch, the Fressnapf Group has built the biggest pet retail chain in Europe, mainly based on its franchise system in Germany. Each year, sales and profit have outperformed the previous year. The many cornerstones of this success:

- a sustainable internalised value chain
- building competences for running stores or affiliate store networks
- e-learning to improve employee knowledge and advising skills
- continuous range optimisation
- 15 own exclusive brands
- fast expansion at and in the right locations
- gaining competences for international expansion
- centralised systems and processes, but localised customer service
- shift from mass marketing to loyalty program and CRM systems, for example PAYBACK in Germany and Austria
- using big data and customer insights

[▶ SEE NEXT PAGE](#)

"All of this remains essential, but is by no means enough for the next phase," says Torsten Toeller, chairman of the Fressnapf Group. To pave the way for future success, the Fressnapf Group has collected more than 1,500 ideas from employees, franchise partners and the management team, clustered in 27 focus areas. This input, combined with management vision, will guide the group to a prosperous future. The process is led into the corporate strategy 'CHALLENGE 2025'.

Going cross-channel

In today's fast-changing world, the retailer has to be where the consumer wants to buy, no matter when or where he wants to shop at Fressnapf – 24/7. Integrating the online channel into your retail concept needs to be based on customer insights and deliver the right connection between the different platforms. A mix of service apps, social media and digital assistance should be linked via big data solutions. The result is an eco-system for pet lovers.

Innovation lab

Transforming its core business has to be achieved step by step within the existing matrix organisation. It will mean changes to all departments and all core processes. Today's successes are no guarantee for the future, so innovation must always be part of a business strategy. To ensure that innovation in the company continues to thrive, the Fressnapf Group has created an innovation lab in Düsseldorf: a separate DMU, with its own budget to develop ideas and investigate start-ups. Promising concepts will be tested and if successful transferred to the central organisation. A company-wide app, the 'FRESSNAPP' has also been launched. Here, employees can discuss topics, propose ideas and reach out to management.



Keeping the human connection

Consumers still like to meet 'real' people, getting advice from expert employees. A pet shop should be more than just a place to buy products; it should solve problems, provide services and also be somewhere where you enjoy being. This is what the new eco-system should deliver along all customer touchpoints – whether online, mobile or at the local store. So the shop manager will gradually become a local community and customer manager.

"We must also be realistic. The consumer will not pay for additional services delivered via apps," says Torsten Toeller. "As an omni-channel platform, you have to be a problem solver and deliver a set of services that make the consumer's life easier. You offer them a yearly subscription with a low fee. Just like Amazon is doing with their Prime clients."

Franchises part of the DNA

Torsten Toeller believes that the overall number of pet stores will decrease within the next few years, but the number of Fressnapf | Maxi Zoo stores will still grow. It is simply the survival of the fittest. They do have to be in the right locations, close to supermarkets, because the online market share will grow but still be limited. Most Fressnapf | Maxi Zoo shops are already where they should be.



Fressnapf's German franchisees are part of the company's DNA. They invest in, trust and engage with the concept. They are key players in the operation who will benefit from the products and the full service concept.

Sustainability in the community

Today's consumer requires sustainable products and solutions. The Fressnapf Group is therefore building sustainability as a strong USP. This goes hand in hand with investing in local social responsibility options. For instance, stores adopting shelters to donate pet food to. Here again, the shop manager can play an important role.

An eco-system for the future

The Fressnapf Group eco-system will be open to all suppliers, service providers and others in the pet industry. The intention is to share the platform and customer data in order to give the pet lover and their pet the best possible experience – solving their problems and making their lives easier, better and happier. The company's vision 'Happier Pets. Happier People.' and its experience with the journey it is about to embark on, may well later benefit the pet industry as a whole. ♦



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Pet humanisation in German-speaking markets: challenges & opportunities

In a region where dogs seem to be shrinking, there is growth at both ends of the market. Premium food and non-food segments are appealing to the small-dog owner, while retailers introduce more and more private labels.

Dogs for new lifestyles

Dogs in Germany, Austria and Switzerland are getting smaller. In fact, the small-dog population across these markets (< 9 kg) has grown 56% faster than that of larger dogs since 2014. Breeds like the dachshund continue to grow in popularity, as ageing 'empty nest' couples prioritise pets that are easier to handle. At the same time, urbanisation trends are creating more single-person households with smaller living spaces. These consumers want dogs for companionship but only have the space for smaller breeds.

Less can be more

As smaller dogs eat less, this trend has proven to be a drag on volume sales of dog food. After growing 3.2% and 2.9% in 2014 and 2015 respectively, volume growth has slowed to a CAGR of less than 1% since 2016.

At the same time, small dogs have been the biggest beneficiaries of pet humanisation trends. Dog owners are treating their companions more like family members, driving interest in premium food and new types of non-food products. [▶ SEE NEXT PAGE](#)



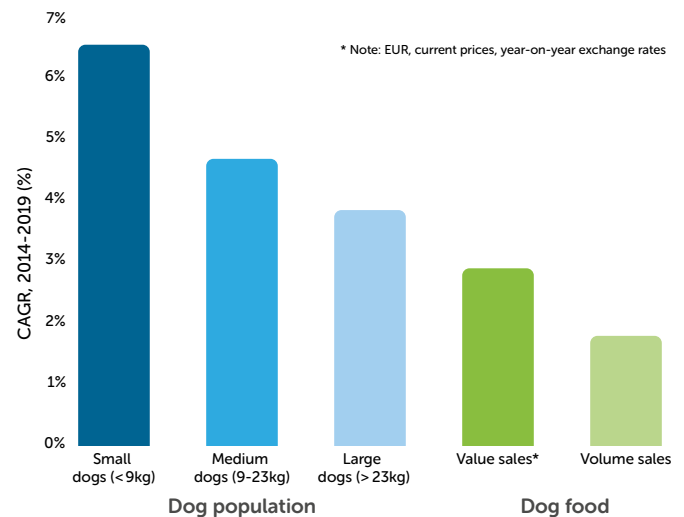
This has helped value sales of dog food outpace volumes and has driven healthy overall growth for the pet care industry. In fact, between 2014 and 2019, total value sales across pet care grew by more than 9% in these markets.

All-natural

Ancestral diet foods have become an increasingly important part of pet humanisation trends in German-speaking markets. As pet owners become better educated about canine health and nutrition, they are showing interest in foods based on the natural diet of the ancestors of domestic dogs and cats. Such products are typically positioned as all-natural, high-protein and often have single-source protein formulas.

In Germany, Finner's launch of Rinti Huhn Total and Miamor Feine Beute provide great examples of this trend in dog and cat food, respectively. Biologically Appropriate Raw Food (BARF) diets are an important part of this trend as well, and manufacturers like Qualipet in Switzerland continue to expand their BARF offerings.

Dog population and food growth in Germany, Austria and Switzerland, 2014-2019



Connected pet products

Technology represents another important frontier for pet humanisation. As consumers become more reliant on technology, demand is growing for connected pet products that allow owners to better monitor and care for their companions.

The Catspad, for instance, has gained traction in Switzerland. This automated food and water dispenser integrates with smartphones and other connected devices. The app can identify different animals via microchips or Catspad collar tags, helping users dispense the correct amount of food according to each animal's specific needs. Another Swiss example is RelaxoPet – a wireless speaker that emits subliminal sound waves to help reduce stress and anxiety in pets.

Private label threatens value growth

While humanisation trends offer potential for continued value growth in pet care, the rise of the private label presents a significant threat. As retailer brands become more innovative, they are offering many of the premium features that consumers want at significantly lower price points.

In natural food, for instance, premium private label lines like Wolf of Wilderness by Zooplus and Real



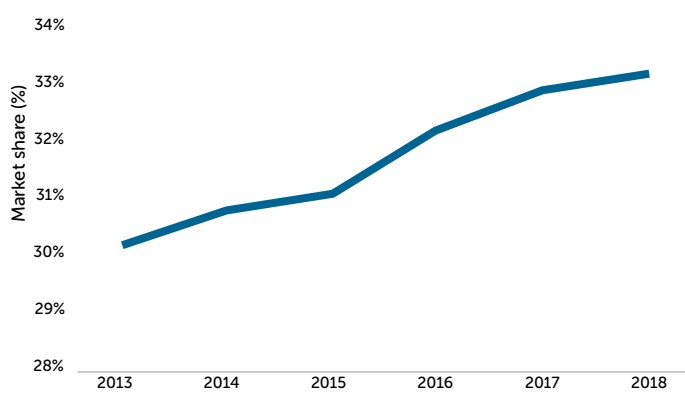
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Private label share in pet care:
Germany, Austria and Switzerland, 2013-2018



Nature Wilderness by Fressnapf have gained traction. Fressnapf is also a major private label player in pet products. In 2018, it expanded its online store to Austria to further expand the availability of its private labels. Online giant Amazon also launched its own Lifelong Complete private label pet food in 2019, furthering its bold expansion plans in Germany.

The penetration of private labels in the German-speaking world is already high by global standards. Across pet care, private labels held 2018 value shares of 46%, 32% and 27% in Austria, Germany and Switzerland respectively. The popularity of hard discounters like Rewe (with pet brands Billa and Clever) and Lidl (with pet brands Orlando and Coshida) in these markets highlights consumer willingness to save money by buying private label products. As these private labels incorporate more premium features that tap into current consumer trends, unit price and value sales growth in pet care may slow. ♦



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Bunny Tierernährung GmbH GERMANY

In harmony with people, animals and nature

When it was set up over 30 years ago, the company's philosophy was 'In harmony with people, animals and nature'. And this is still at the heart of their activities today.

Different perspective

Founded in 1988, the main focus of Bunny Tierernährung GmbH was to support animal well-being by developing and producing the best possible products for small mammals. Looking at the best-selling products at that time from a strictly nutritional-physiological perspective, it was obvious that the foods did not meet the specific needs of the species. Bunny decided to change this, and created plant-based food aligned to nutrition and physiology insights. The pure green plant pellets they developed were revolutionary in their sensory composition.

Sensory perfection to enhance well-being

One of the aims of the Bunny team is to achieve sensory perfection with their products. Continuous product development is vital for maintaining high standards in formulas for rabbits and rodents. The wealth of knowledge available at Bunny of both small mammals and technology gives them the opportunity to implement innovative ideas. In 2004, for example, the team developed and optimised TriMello, a simple pellet for small mammals. One particular feature of all basic formulas still applies today: feeding 'ad libitum', meaning it is freely available rather than restricted.

Bunny is the only company selling this uncomplicated, convenient type of nutrition for all nine small mammals: rabbits, guinea pigs, chinchillas, degus, hamsters, dwarf hamsters, mice, gerbils and rats.

Holistic small mammal concepts

Over the years, the company has continued to come up with new ideas. Bunny now stands for holistic small mammal concepts that are positively received by the trade, consumers and animals alike, and it sets new trends again and again. It has, for example, expanded the segment with successful



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concepts such as BunnyBedding and BunnyInteractive.

Another product is hay from nature conservation meadows. The company is involved in the whole production process in order to guarantee the hay's unique quality: from the mowing via gentle drying of the crop to careful hand-filling.

All-nature

In 2018, Bunny All-nature launched a completely new concept called Botanicals: balanced foods containing only dried plants, herbs and flowers. This is in line with a growing global trend for feeding rabbits, guinea pigs, chinchillas and degus. With the Botanicals concept, Bunny can provide a carefree diet for small mammals.

Successful global development

Over the past few years, the company has seen strong global development. Oliver Petzoldt, managing director since 2014, has been enthralled new customers all over the world with the Bunny concept and products. Products are now selling well in 28 different countries.

The company will continue to promote and support the small mammal segment with species-appropriate concepts. Further globalisation is now the main focus. In all this, being in harmony with people, animals and nature remains the guiding principle for Bunny's work. ♦

♦ Bunny Tierernährung GmbH

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Premium yeast products with health benefits

Leiber has a global presence with its yeast products – rooted in tradition and yet innovative for the future.

High quality yeast

Since 1954, Leiber GmbH has been supplying customers worldwide with premium 'Made in Germany' brewers' yeast products for animal nutrition, the food industry and food supplements. Using a patented process to dry the yeast, Leiber manufactures brewers' yeast products and yeast extracts to the highest level of quality. It has over 230 employees working at two sites in Germany and other production sites in Poland and Russia. An ever-growing number of international sales partners complete the Leiber brewers' yeast network.

Naturally improved health

Only 'real' brewers' yeast contains the valuable ingredients hops, humulone and lupulone. Due to its special composition, it sustainably increases the acceptance and uptake (palatability) of foods in a natural and healthy manner. The high content of nucleotides, amino acids, B vitamins and trace elements improves breeding, growth and the appearance of pets and small animals.

Advantages brewers' yeast

- Better acceptance of foods in a natural way
- Increased resilience, particularly in stressful situations
- Improved immunity and resistance to infection
- Optimisation of digestive processes
- Natural provision of vitamins and active ingredients
- A thick and shiny coat

In different combinations

The company offers a number of product solutions: from pure brewers' yeast and brewers' yeast applied as a carrier substance with additional effects, to yeast extracts and autolysates. Leiber has expanded its range of combined yeast products and adjusted its food to meet current market trends. For more than 60 years, it has been combining pure brewers' yeast with functional fibre products such as brewers' grains, malt sprouts or wheat germ, using a

manufacturing process it has developed to protect the nutritional ingredients in brewers' yeast.

Also grain-free

The demand for so-called grain-free products has been growing for several years now, especially for pet food and horses. Leiber is taking this trend into account by offering innovative combinations with grain-free fibre components as Leiber YeaFi® – The Yeast Fibre Concept. This new product line combines pure brewers' yeast with depectinised apple pomace, unmolassed beet slices, pea fibres and carrot pomace. Apart from pet food, new Leiber YeaFi products are also suitable for feeding livestock. ♦

♦ **Leiber GmbH**
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leibergmbh.de

A close-up photograph of vibrant green grass blades, filling the background of the page. The blades are sharp and detailed, with some showing small white dew drops. The lighting is bright, creating a fresh and natural feel.

Pet health meets pet food technology. A fresh look at fibre innovation.

In past years there has been a steady stream of new product developments in the pet food and treat market. Increased awareness of nutritional and technological benefits of ingredients such as fibre allows manufacturers to develop more holistic solutions.

Gut health

Feeding complete foods rich in natural fibre is undoubtedly good for a pet's health – a fact that is backed up by an array of scientific studies. As components of pet food, and functional ingredients, specific fibre sources are primarily known for their ability to keep a pet's digestive systems healthy and balanced. Clinical studies have shown that supplementing dry and wet cat food with cellulose fibre helps to reduce typical hairball symptoms and to raise faecal hair excretion in cats.

Preventing obesity

As in humans, pet obesity numbers continue to increase year by year. According to the Association for Pet Obesity Prevention (APOP), nearly 60% of cats and 56% of dogs in the US are overweight or obese. Weight management foods enriched with concentrated cellulose fibres can help to better control weight in cats and dogs without affecting food palatability.

Dental care

Oral health is another top concern among pet owners. Approximately 70% of cats and 80% of dogs develop some form of oral health problem by the time they are three years old. Clinical studies have proved that dental foods and snacks enhanced with specific cellulose fibres work more effectively to promote oral health in dogs when compared with fibre-free control products.

Standardising quality

Consistency, texture and uniformity of pet food products are key quality attributes

that are important to consumers but may be difficult to maintain. Given the variable nature of ingredients and the complexity of the manufacturing process, creating the right consistency can be a challenge for the manufacturer. Well-known binders such as spray-dried plasma (SDP), wheat gluten or egg white/albumin are commonly used in so-called restructured meat products like chunks, and in all meat applications, for their high swelling, water retention and emulsion capabilities.

With a series of long-term pilot-scale tests at the JRS Technical Competence Center in Rosenberg (Germany), it has been demonstrated that a favourable cost benefit can be achieved by partially replacing conventional binders with functional cellulose fibres. Regardless of the type of meat ingredient tested, replacing 2% SDP with 1% cellulose helps to optimise the key parameters in a steam tunnel process and to improve the textural parameters of the chunk before and after retorting.

Fibre as a tool

Research is also currently underway into capturing product quality features in dry 'grain-free' products with high meat inclusion, in order to overcome typical extrusion challenges such as stickiness, reduced throughput or poor product integrity. Cellulose fibres can therefore be considered the pet food technologist's toolbox for providing a wide range of functionalities across the whole spectrum of pet food products: dry to wet, frozen to sterilised, and even dietary supplements such as tablets.

Innovation unleashed

With enormous demand across the pet industry for innovative products, manufacturers are looking for unique, marketable and functional ingredients.

Special cellulose products with distinct fibre structure and length are often key to the successful development of holistic foods and treats, and for the newer categories of fresh and frozen pet food.

As a leader in fibre products, JRS offers a comprehensive range of fibre ingredients that are suitable for all manufacturing processes and formulation options. Fibres that can help to create food for better differentiation and improved pet health. ♦



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31 October to 3 November 2019

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GlobalPETS Forum Asia

19 November 2019

National Exhibition and Convention Center
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CIPS 2019

20 to 23 November 2019

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Grand Hyatt Athens, Athens, Greece

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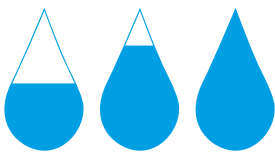
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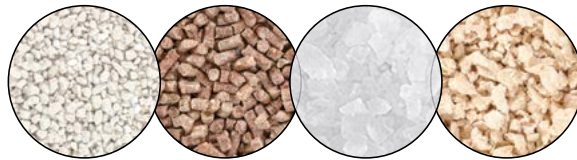
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