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Litter

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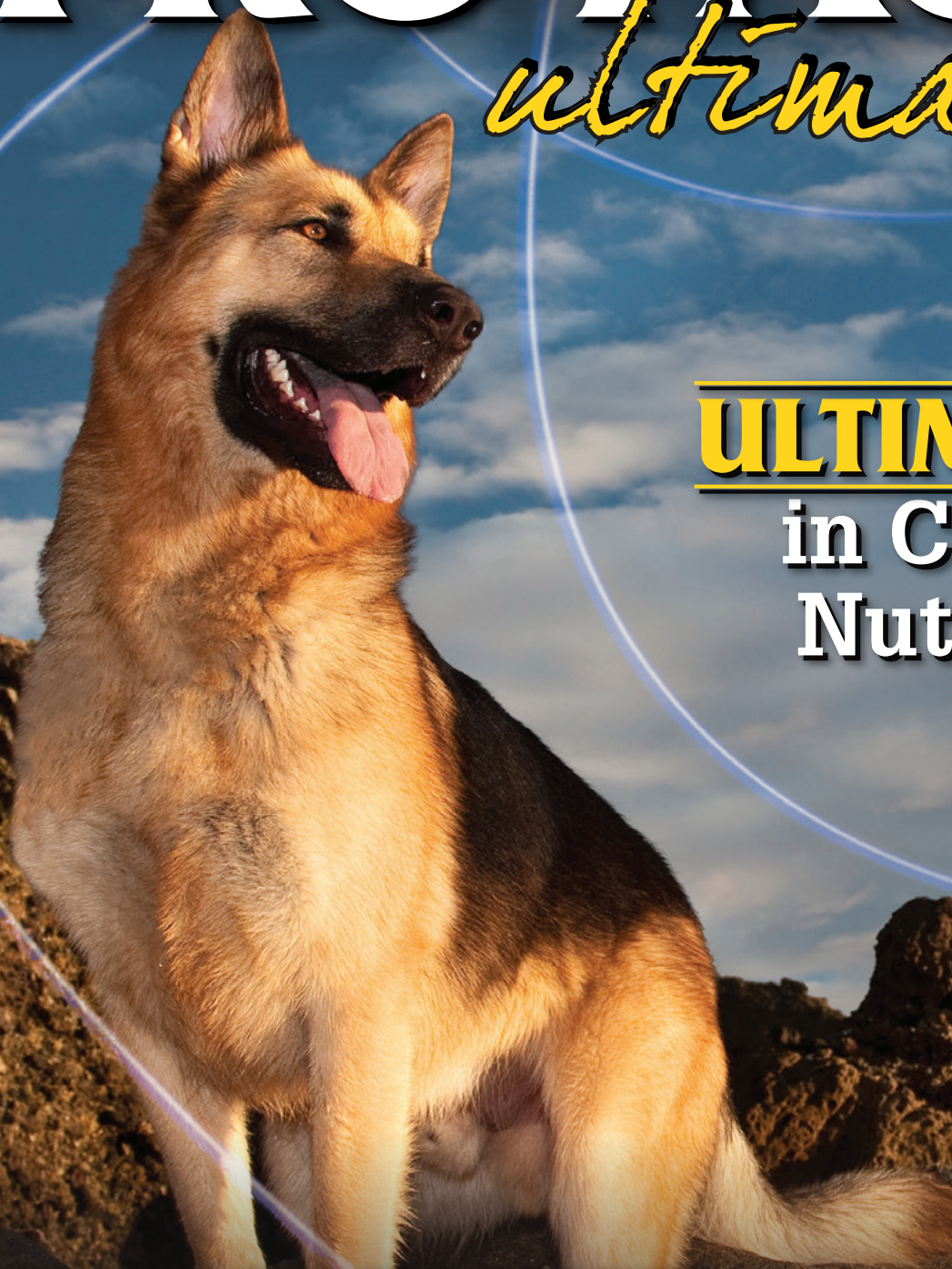
China

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Looking back, Looking forward

In this final issue of 2017, we delve into the world of litter – cat litter in particular. Cat litter is a top seller in pet accessories with a worldwide sales volume of five million metric tonnes and a value of almost \$3.5 billion (€3 billion). In recent years, we have seen new organic products entering the cat litter market. They are positioned as more sustainable and natural. But are they?

In a combined section about food, snacks, and ingredients, we discuss several topics, one of which is supplier management and sustainability. How have supplier-buyer relationships evolved from those based on conflict to those based on partnership, offering greater scope for sustainability?

Our 'China' section highlights the booming Chinese pet market, which is seeing rapid value growth due to pet population growth and the pervasive premiumization trend.

China is quickly changing from an imitator to an innovator. Internet retailing is quickly closing the gap on pet shops, with fast developing delivery services contributing to the boom even more.

The final issue of 2017 also marks the last issue of volume 29 of PETS International: in 2018 PETS International proudly celebrates its 30th anniversary. The February 2018 publication will be dedicated to PETS International's and the pet industry's development over the past thirty years. Additionally, the core theme of this issue is sustainability, because we firmly believe that this will be the way ahead for the pet industry.



A handwritten signature in blue ink that reads "Corine van Winden". The signature is fluid and cursive, written over a few horizontal lines.

Corine van Winden, CEO

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February issue

30 years PETS International

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Sustainability

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Upcoming issue | Advertising deadline: 8 December 2017 | Publication date: 19 January 2018

Contact head office (see page 68 or local representatives (see page 67).

Pet industry highlights



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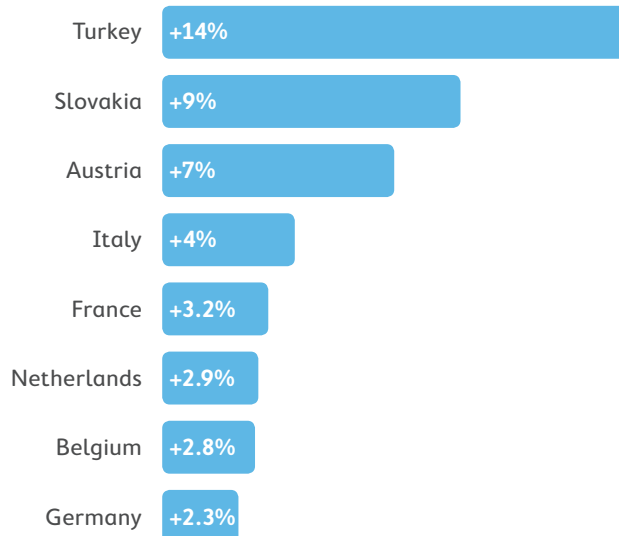
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Correspondence may be edited for clarity or length.

Shoppers are spending again

Consumers across Europe are spending again. Nielsen reports that European consumers spent 3.7% more on grocery shopping in the second quarter than in the first, the largest increase in three years' time. The growth is a combination of a 2% price increase and a 1.7% volume increase, according to Nielsen data on food retailers from 21 European countries.

Major growth markets



Source: PLMA



WPA announces new Association President

World Pet Association (WPA), the business association that supports the needs of the entire pet industry community, and the organisers of SuperZoo, the industry's leading trade expo and conference in North America, is pleased to announce the appointment of Jacinthe Moreau as WPA's new President.



Jacinthe is no stranger to the industry, as she is an accomplished leader and business professional with broad international experience in the Animal Health Industry. Her career trajectory, which includes a variety of roles at prestigious companies such as Vetoquinol, Merial, Merck, VetSource and VCA Animal Hospitals, has successfully prepared her to lead WPA.



In memoriam Enrico Morando, pioneer of pet food in Italy

Founder and director of the family company that bears his name, Morando S.p.A. In the 1950s his curiosity was piqued by an advertisement for pet food.

With obstinacy and determination he introduced dog and cat food production to Italy, challenging public institutions and bureaucratic hurdles. In a very short time, thanks to his entrepreneurial abilities, he set up and developed a number of productive sites, successfully paving the way to an, as yet, unexplored market.

The reins are handed to his sons Giovanni and Walter, the managing directors of the company, and his grandchildren.

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Pet industry highlights



PFMA on how Brexit will impact the UK pet food sector

The Pet Food Manufacturers' Association (PFMA) has been investigating the implications of failing to agree our future trade relations with the EU.

The PFMA undertook a trade mission in Geneva, 9-11 October, to hold meetings with the WTO, as well as several major national missions including Ireland, USA, Canada, Argentina, Brazil, and Australia.

Michael Bellingham, PFMA Chief Executive, led the mission and advised: "In times of uncertainty we have to map out what the various scenarios could mean for our members and the UK pet food industry, crashing out of the EU without a trade agreement is one of them."

"What is clear is that whilst we were warmly welcomed, joining the WTO as an independent member separate from the EU will be very challenging. Having a transitional agreement with the EU is therefore critical to our sector."

Ikea launches new collection of furniture for pets

Swedish-founded furniture giant Ikea has launched its first collection of furniture for pets, including beds, scratching posts, and toys. "Have you ever felt that your cat or other pet isn't just a pet, but a member of the family?" the company wrote on its homepage. "It's exactly that focus that led Ikea to make the comprehensive Lurvig pet product range." As with most of the product names used by the company, there's a meaning behind Lurvig, which is the Swedish word for 'shaggy'.

Ikea says the new collection was created by 'animal-loving designers' with support from trained vets. As well as staples like cat houses, the collection also includes basic items from toys and leashes to pet waste bags and bowls. In keeping with the furniture brand's trademark Swedish efficiency, plenty of the items can be integrated into existing Ikea products, so a pet bed for example could double up as a bedside table or shelf.

For now the animal-friendly items are launching in the US, Canada, France and Japan as a pilot, with plans to bring them to other countries in the future.



Pet industry highlights



PetSmart debuts new store format

The country's largest pet supplies retailer is hoping to get a bigger share of the \$5.4 billion (€4.6 billion) pet care services market – the fastest growing segment in the pet category.

PetSmart unveiled a new store concept, The Groomery, focused exclusively on pet grooming services, with the first locations opening in Manhattan and Oak Park, Ill. Additional locations will open in Scottsdale, Ariz., with two more expected to be announced soon. The new format features a salon-style modern design in a boutique-sized space of about 167-232 sqm, which is much smaller than a traditional PetSmart.

In addition to classic pet grooming services, it also offers pampering 'Spaw' treatments featuring coconut and other scents, pet-specific deep moisture shampoos and conditioners from popular human brands. A self-service dog wash, allows pet owners to bond and bathe with their own pups. The lobby area of The Groomery stores sell high-end health and beauty pet essentials such as shampoos, brushes, collars, leashes and treats, including a large collection of at-home pet grooming supplies.

Maxi Zoo opens its 100th store in France

Maxi Zoo France is continuing to expand with the opening of its 100th store in Clermont-Ferrand (France) in mid-October. The 500 sqm store is an important step in the expansion strategy of Maxi Zoo France (a subsidiary of the Fressnapf Group).

In 2018 the group plans to invest €12 to €15 million in the launch of new stores across France, which has to lead to 175 stores in 2021.



Zooplus grows by a fifth in Q3

In the third quarter of 2017, Zooplus' online revenue increased 22% to €277 million (\$266 million).

This shows a continued growth, as started in the first and second quarter. Based on current figures, Zooplus continues to forecast sales of about €1.1 billion (\$1.3 billion) for the whole of 2017.

This is a sharp increase compared with 2016 when a turnover of €909 million (\$1.1 billion) was achieved. This was a growth of 28% compared to 2015.

By 2020, the web shop for pet supplies has the ambition to break the limit of €2 billion (\$2.4 billion).

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Litter

Cat litter is a top seller in pet accessories. In recent years, new organic products entered the cat litter market. They are positioned as more sustainable and natural. But are they?

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The most sustainable cat litter

Cat litter is a top seller in pet accessories with a worldwide sales volume of five million metric tonnes and a value of almost \$3.5 billion (€3 billion). In recent years, we have seen new organic products entering the cat litter market. They are positioned as more sustainable and natural. But are they?

A brief history

A cat's natural behaviour is to go into the garden. For domestic cats, the litter tray was invented long before the Second World War. At that time, people were using ordinary sand, wood shavings or old newspapers as litter. It was not very hygienic and quite smelly. In 1948, Ed Loewe invented cat litter. Initially, this was a clay-type product called attapulgit, with interesting absorption properties.

In the early eighties, clumping cat litter made of bentonite was invented. The clumps lock in the unpleasant odours and can be scooped out once a day. After scooping, the litter tray is clean again and has to be filled up to the original level. In contrast, with non-clumping litter, the entire litter tray has to be renewed once or twice a week, which makes clumping material more economical to use.

In the nineties, the first non-clay products entered the market. Typically, the non-clay or organic cat litters (made from wood, corn, straw, hay, coconut skins, et cetera) do not form clumps. However, in recent years we have seen further development. Thanks to special processing and additives, clumping organic products have entered the market.

Litter reputations

The disadvantage of mineral-based products is that the raw materials are mined, potentially causing unnecessary harm to the environment. On the other hand, non-mineral-based products are organic in origin and are generally residue from another organic product or production process. Obviously, this is seen as more sustainable and natural. So today, organic litters have a better image with respect to sustainability. But is this well-deserved?

Litter

Overview of the most common types of cat litter

CAT LITTER TYPE	CLUMPING	NON-CLUMPING
mineral-based	bentonite	aerated concrete attapulgit moler clay sepiolite silica gel
organic-based	cereal chips corn chips wood chips	hay pallets paper pellets wood pellets

Source: various sources Sivomatic 2017

Market share of cat litter worldwide

CAT LITTER TYPE	CLUMPING	NON-CLUMPING	TOTAL
mineral-based	61%	32%	93%
organic-based	4%	3%	7%
total	65%	35%	100%

Source: various sources Sivomatic 2017



Product life cycle inventory

In order to compare the different product categories, Sivomatic carried out an extensive product life cycle inventory (see diagram top right). It is interesting to see that the production steps in the different product categories are very similar, if not identical.

Clay

Mineral clay products start their journey in a mine. For cat litter clay, it is always open pit mining. In any country, mining goes with heavy legislation and reclamation obligations. After mining, the land will be brought back in the original state to the extent possible. E.g. hilly areas will return ten meters lower or farmers will return to their land at lower altitudes.

Wood

Ideally, wood products are made of local wood waste. However, in reality most products

unfortunately originate from industrial production forests. Only clean soft woods can be used, e.g. pine and spruce. Hard woods like oak, et cetera, cannot be used due to its low absorption capabilities.

Paper or corn

Collecting cereal or corn waste for cat litter is not easy. In an agricultural country like The Netherlands, all the corn waste goes into animal feed, due to its caloric value. This is a higher grade of recycling than turning it into cat litter. Corn residue needs careful washing and cooking to prevent the organic content to be a growing medium for bacteria of cat urine and faeces.

Paper waste needs to be carefully selected due to inks. Paper waste may be smelly and needs washing/ cooking for cleaning in order to get a suitable end product.

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All product categories need crushing and sieving, packing and shipping. In general, clay products will end their life in incineration plants, whereas wood, paper and corn will be disposed in the green bin and be fermented.

However, we must add that there are quite a lot of exceptions to this rule. Depending on local legislation, in some areas all litters can be put in the green bin, whereas in other cases not any litter is allowed. Toilet flushing of any litter is forbidden in most countries, due to blockage risks.

CO₂ emissions

Following an inventory of the different stages the product passes through, the next step was to translate this into a life cycle analysis in terms of CO₂ emission. Sivomatic carried out a detailed life cycle analysis for The Netherlands, with interesting results.

CO₂ per kilogram

In general, all litters show very low CO₂ emissions of around 170 to 410 grammes of CO₂ per kilogram of cat litter (see table below). Non-clumping organic material shows the lowest value of 170 grammes of CO₂ per kilogram of cat litter.

Silica gel is excluded from the calculations because this product (produced in China) has more than ten times the CO₂ pressure of other types. It takes approximately five tonnes of coal to produce one tonne of silica gel.

CO₂ emission per kg (grammes of CO₂ per kilogram of cat litter)

CAT LITTER TYPE	CLUMPING	NON-CLUMPING
mineral-based	250	320*
organic-based	410	170

* Excluding silica gel

Source: Sivomatic 2017

Litter

CO₂ per cat

The CO₂ emission per kilogram of cat litter is good to know, but the consumer uses cat litter by volume and not by kilogram. No matter the weight, people fill their litter tray by volume, with a layer of five to eight centimetres.

If we adjust the numbers for density and material use, we get the grammes of CO₂ per cat per day (see table below). Clumping litter shows figures from 24 to 19 grammes for mineral and organic-based litters. Non-clumping shows higher figures at 42 and 32 grammes CO₂ per cat per day.

CO₂ emission per cat per day (grammes of CO₂ per cat per day)

CAT LITTER TYPE	CLUMPING	NON-CLUMPING
mineral-based	24	42*
organic-based	19	32

* Excluding silica gel

Source: Sivomatic 2017

It is noteworthy that the figures in both tables are very different. For example, clumping organic goes from the worst score at 410 per kilogram to the best score at 19 per cat.

We have to realize that all these numbers are aggregates. For instance, bentonite is sold as coarse grain and fine grain. The finer product is twice as economical as the coarse product, due to more compact clumps and a better lock-in effect for odours. With organic clumping litter, we can say that clumping wood is better than clumping corn, due to easier production. The use of additives, like perfumes, on any material will improve material efficiency.

If we calculate the weighted average of all litter, the outcome is 33 grammes of CO₂ per cat per day. This is the equivalent of just one 12-watt LED lamp burning only six hours per day – so very low.

The best and the worst

CAT LITTER TYPE	GRAMMES OF CO ₂ PER CAT PER DAY
White Turkish bentonite	12
Clumping wood chips	14
Aerated concrete	47
Silica gel	741
All litters*	33

* Excluding silica gel

Source: Sivomatic 2017

In short

This research obviously has its limitations. We are talking about CO₂ as if this were the only parameter that matters. Therefore we can draw the following conclusions only carefully:

- The life cycle inventory of all litters is surprisingly similar.
- Clumping litters outperform non-clumping litters, because only the clumps have to be disposed of.
- Clumping organic litter shows the lowest CO₂ pressure per cat per day on average.
- Density and efficiency in material use are the most important factors in comparing the different litters.
- Finer grains and additives like perfumes improve material efficiency.
- The average outcome of 33 grammes of CO₂ per cat per day is very low compared to other consumer goods.
- Clumping Turkish white bentonite and clumping wood chips are the winners when it comes to CO₂ only.

Having said all this, if your cat got to choose, the real test winner would probably be the garden. ♦



Peter Verseveldt

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Cat litter trends in the US

Cat litter sales in the US market are projected reach \$2.76 billion (€2.35 billion) by the end of 2017. For the period between 2012 and 2016, Packaged Facts estimates a 3.6% CAGR (compound annual growth rate).

Slowing down

Because cat litter is a mature category drawing a very high percentage of cat owners, its advancement depends largely on growth in the number of cat-owning households, which has slowed of late. Additionally (and unlike pet food, where premiumization has been a major factor boosting dollar sales), the cat litter category lacks a steady influx of new super-premium options, and price points have remained relatively flat.

Channels

Two-thirds of cat litter sales occur through mass-market channels, including roughly a third in mass merchandisers/supercentres (such as Walmart) and a fourth in supermarkets. The pet specialty channel accounts for another fourth of the market. For the foreseeable future, the bulk of retail sales will

continue to occur through mass-market channels – although internet sales, currently incremental, will begin to advance.

Modest but steady

As reported in Packaged Facts' *U.S. Pet Market Outlook 2017-2018*, product sales in the pet industry, and for pet supplies in particular, picked up the pace in both 2015 and 2016. Packaged Facts estimates that retail channel pet supplies sales (excluding pet food) reached \$16 billion (€13.6 billion) in 2016, with cat litter accounting for approximately 17% of that total. Packaged Facts estimates that sales of cat litter will continue along their modest but steady growth trajectory to approach \$3 billion (€2.6 billion) at retail by 2021. Growth will be fuelled by the slowly expanding number of cat-owning households but also moderated by the maturity of the category.

Natural and eco-friendly pet products are a key driver of overall pet market growth.

Scoopable clay formulations, used by 73% of cat litter purchasers in the US, continue to dominate the category. Even so, cat owners have a wide range of litter types to choose from, including natural and eco-friendly litter and the relatively new lightweight options. Regardless of the litter type, at the top of cat owners' litter requirements are acceptance by cats, odour control, and ease of use.

Eco-friendly

Environmental concerns are, nonetheless, slowly becoming more of a factor in the market. Packaged Facts estimates the amount of clay produced in the US for cat litter at over 2.6 million tonnes in 2016. Though these clays do an excellent job of absorbing cat waste and odour, they are also hard on the environment, and there is also the environmental impact of the cat waste itself.

Natural and eco-friendly pet products are a key driver of overall pet market growth and have impacted every facet of the market, with special significance in the cat litter category. Given both the environmental and potential health implications of clay- and silica-based litter, cat owners are beginning to seek out more natural options that are safe for their pets and more eco-friendly. The cat litter market is therefore ripe for further inroads by natural and environmentally friendly products.

Potential

In addition, pet populations that have particular significance for sales growth in the cat litter market are the elderly cat population and rescue animals. These two groups have unique needs in terms of litter, and there is market potential in targeting cat owners with older cats or rescue cats that have lost bladder or bowel control or that have difficulty transitioning into a household environment.

Market players

Over fifty marketers compete in the cat litter category in the US market, but only a handful of the largest pet market competitors claim a significant market share. Many of the smaller marketers compete with niche products, such as natural litter or litter that addresses specific needs.

Competition in cat litter is very strong, and participants focus heavily on bolstering their own product lines through line extensions, reformulations and new product releases, all supported by chain retailer relationships and heavy consumer marketing and advertising. With cat litter being a mature category as well, it is difficult for newcomers to enter – and challenging even for established brands seeking to gain or even maintain.

Part of the competitive logjam is that few cat litter brands are marketed exclusively in the pet specialty channel, unlike the case in the pet food category, where many natural/organic and super-premium products are available only through pet specialty retailers. At the same time, major chain retailers of pet products have robust private label programmes, typically including cat litter.

Some retailers have even upgraded their private cat litter offerings to capitalize on premium trends, adding specialty formulations such as lightweight and multi-cat litter products. This lack of exclusivity helps explain why the pet specialty channel does not play as significant of a role in cat litter as in cat food or dog food, and points to an opportunity for market growth.

► SEE NEXT PAGE



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Consumer trends

Packaged Facts consumer survey data from September 2017 show that multi-cat litter is a top feature sought out by cat litter purchasers, with 35% selecting this type of litter when making their purchase in the past 12 months. Odour control is also a key product characteristic, with 30% buying longer-lasting odour control products and 29% buying extra-strength odour control products.

Since its introduction in 2011, lightweight litter has been a major factor in new product development in the litter category, and no other technological advance has had comparable impact in the intervening years. Consumers like the reduced weight because the product is easier to handle, easier to scoop, and generally easier to manage.

In addition, a growing subset of the litter category is health monitoring litter, a product that allows owners to keep tabs on their cat's health by

examining changes in the litter box. Cats are good at concealing when they are in pain or poor health. As a result, hidden health issues can grow worse with cat owners being completely unaware. A related trend is special needs litter designed for cats with allergies or injuries, and for ageing pets that no longer accept conventional litter.

Such trends tie into a larger development across food and non-food pet product classifications in the US market. While pet food and pet medications remain at the core of the pet wellness market, pet parent concerns – and innovative products and services introduced to address those concerns – are extending well beyond. ♦



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Delving into cat litter

Traditionally, cat litter was only needed for kittens, poorly or elderly cats, to provide them with an area to hygienically relieve themselves whilst kept in the home. However, recent ownership of cats has extended to keeping them indoors, rather than allowing them to roam.

Safety reasons for indoor living

The pedigree breeding industry has resulted in felines of specific types becoming fashionable, and demand for these breeds sees owners spending significant sums of money to obtain kittens with detailed breed specifications, whom they wish to protect from outdoor dangers such as:

- being hit by vehicles
- injury from other cats, dogs or predators
- contracting infectious diseases or exposure to parasites
- ingesting poisons
- theft

Cats roaming around the world

Owners in Europe generally allow cats to roam freely, with only 10% in the UK living permanently indoors. However, in the US, where the pet cat population is estimated at around 74 million, indoor living is actively encouraged, as it is in countries such as China (53 million pet cats) and Russia (17 million pet cats), where inner city apartments mean cats simply cannot roam free.

Even in Australia, a recent small survey reported that 92% of their pet cat population is kept indoors (source: Pet Ownership in Australia 2013).

Litter

The need for litter

Litter needs to be provided to allow these cats to safely, and happily toilet indoors. Behaviour problems arise if a cat dislikes the toilet substrate (the substance used for the litter box). This can lead to feline urinary disease and other stress-related issues, as well as the cats toileting elsewhere in the home, often in the bath.

The responsibility is very much on retailers to make sure cat customers are provided with the right choices for their litter, while also keeping human customers happy. Each brand of litter will feature many of the following attributes, requiring research into a range that meets most demands.

Litter types and customer advice

Dust-free litter types: these include 'natural' litters made from grasses, with a sand-like texture that clumps together.

Quick-absorbing: microporous litter types, such as those made with whole-kernel corn, mean that liquids are quickly absorbed. Dehydrating crystal litter types claim that all urine is absorbed, meaning that only faeces need be scooped.

No tracking/sticking to paws: owners do not want litter dust trodden all over the house, nor do cats enjoy it sticking to their paws, which can occur with sand or earthen types of litter. Wooden (pine) or walnut shells are sold in pelleted form, which helps.

Clumping: popular with humans, the litter clumps and sticks together when wetted, meaning that it is very easy to remove when cleaning the litter tray. Many litter types provide this feature.

Low odour: odours can quickly permeate an apartment.

In addition, within a short time the litter can smell stale due to residue. Low-odour litters may or may not suit the cat's acute senses.

Natural: chemical and additive free. Natural paper litters are often recommended as a natural alternative, free from synthetic scents which can be aversive to the sensitive feline nose.

Scented: whilst synthetic or perfumed litters may suit owners, for a cat this can be unpleasant. Some litters contain herbs, designed to attract the cat.

Lightweight: owners have to transport cat litter with their regular shopping. In addition, the cost of shipping and delivery for litters means that the prices reflect this. But customers may not appreciate lightweight litter being scattered far and wide around the floor as the cat digs to cover their eliminations.

Low volume: an advantage for trade and transport, less to carry usually means lower cost, but some cats prefer a voluminous and substantial substrate, since they would naturally toilet in soil.

Eco friendly: as well as the natural litter types described above, wooden and paper litters made from reclaimed fallen timber appeal to owners.

Ask customers what their cat likes and encourage them to try different litter types until the cat is happy. As every cat owner knows, ultimately, the cat is the customer. ♦



Karen Wild

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EcoGrain THE NETHERLANDS

EcoGrain is the most environmentally friendly cat litter

EcoGrain is a 100% natural cat litter made from the natural co-product of cereal production. The husks are pelletized which makes a unique cat litter.

This environmentally friendly cat litter is already sold at Pets at Home, Ocado, Amazon and the largest veterinary wholesaler NVS in the UK. EcoGrain will soon be on the market in The Netherlands and Germany.

Benefits of EcoGrain cat litter:

- Biodegradable
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EcoGrain

info@ecograincatlitter.com
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NEO by **ZOLUX**
Highly recommended for happy pets



Maximum stability thanks to fastening system (rodents)



Transparent plastic for a sleek design (rodents)



Outside perch (birds)



Separating the wheat from the chaff...



**What better way to create a great company story.
This happened with Catural and Draynecs BVBA, both of which believe firmly
in being far-seeing, sustainable and environmentally conscious.**

Symbiotic cooperation

Designing products to be used easily in the biological cycle right from the start is what Catural and Draynecs BVBA aims at, working together successfully and intensively, developing groundbreaking products and innovative design processes. To further these and safeguard them permanently in one of the most fertile grain-growing areas of south-west Germany, at our company in Mannheim.

Sustainable and reliable

To us, nature and the environment are paramount. Acting responsibly is our standard, and ensuring our innovative products meet environmental standards means we create quality, transparency and confidence in our brands. We make products sustainably which can make the world a better place, benefit our environment, satisfy our customers and keep our pets healthy.

The raw materials used in CatOkay Organic come almost entirely from Germany and are processed here, so they do not have far to travel and leave little CO2 footprint behind. We source nearly 100% of our raw materials from businesses within a radius of 100 km. Through being sustainable and environmentally friendly, our CatOkay Organic cat litter succeeds in combining highly efficient raw materials and a responsible awareness of people, animals and the environment.

CatOkay – quality you can feel

The quality and sustainability of innovative chaff starts by making CatOkay Organic cat litter entirely from vegetable raw materials which are by-products of making flour, providing a 100% biodegradable product. The capillary system of the grain fibres seals liquids in effectively, making CatOkay Organic cat litter up to three times as

productive as conventional lumpy litter, so it is extremely economical to use. Our special hydrothermal production process guarantees a functional paw-friendly surface structure, ensuring the top layer of the litter binds liquids in and seals them in permanently. Its capacity to absorb odours means it needs to be changed less often. And as it weighs less (8 l = 4.5 kg) than e.g. mineral cat litter, CatOkay Organic is easier to carry.

Our cat litter is free from artificial additives, and can be disposed of easily in your recyclable bin or as compost. Biological chaff breaks down completely thanks to bacteria and other micro-organisms. CatOkay Organic has already won the German FutterTester 'good' seal. ♦

♦ **Draynecs BVBA**
info@draynecs-catlitter.com
draynecs-catlitter.com

Odalia FRANCE

A new range of odour management solutions for cat litters



One year after its creation, Odalia has launched C'SCENT, its first range of odour management solutions for cat litters.

Living together

"As the trend of 'pet parenting' continues to gather momentum, a growing number of cat owners share their living space with their cats. Odalia, a part of Diana Pet Food, develops unique, innovative scent and care solutions for pets and their owners to live in perfect harmony," says Marc Henry Lussigny, Director of Odalia.

Cat owners are interested in litters that do not discourage their cats from using their litter box and which stay fresh-smelling for as long as possible.

"Developed to improve the smell and attractiveness of cat litters, our new C'SCENT line helps create a more pleasant environment for cats and their owners."

Unique research in odour management

To design ingredients that are perfectly adapted to today's cat litter market, Odalia's expert scientists have adopted a holistic approach to odour management research that integrates cat behaviour, owner expectations, and product characteristics. C'SCENT

has been formulated using Diana Pet Food's multifaceted expertise in pets and Symrise's extensive knowhow of fragrances and consumer science.

Inspired by pets

Together with Odalia, Diana Pet Food's expert ethologists and statisticians have carefully studied cats' behaviour when using the litter box. They have used video observation and developed new methodologies to identify innovative criteria and behavioural patterns that can be used to assess litter attractiveness and effectiveness.

Litter



Marc Henry Lussigny, Odalia Director

Listening to owners

Odalia and Symrise have also conducted consumer studies to investigate cat parents' expectations of litter. These included an in-home survey of 90 cat-owning families in the US, and an additional online survey of 450 families in Europe conducted via the Yummypets social platform (a social network for pet owners with Diana Pet Food as a shareholder since 2016).

The survey analysed owners' cat litter preferences, their habits and practices, such as type of litter used, purchase criteria and preferred fragrances, as well as the behaviour observed by owners in their cats when they used the litter.

"The results of these studies have confirmed that odour control is a priority in litter choice for owners, and enabled our scientists to identify various consumer types with various needs," said Kathy Lanza, Senior Manager Consumer & Marketing Insights at Symrise.

"The research revealed specifically which type of scents are favoured by cat owners, which has helped us develop new solutions."

Mapping cat litters

Odalia also explored the properties of cat litter by analysing the odour profile and intensity of all US litters (which makes up more than 50% of the world litter market in value) as well as their odour control and clumping performance.

This preliminary step in investigating the options available to consumers was crucial in ensuring that Odalia could develop a diverse range of fragrances that match the selection of litters currently available on the market.

Advanced aromatic technologies

The high performance in controlling litter odour achievable with the C'SCENT line is due to advanced aromatic technologies developed by Symrise, such as

NEOFRESH®, which is traditionally used to overcome specific environmental, basic or body-related malodours.

"NEOFRESH technology simultaneously prevents the formation of malodours, removes malodorous compounds from the air, and suppresses the perception of offensive odours. Using suitable fragrances, it also modulates our perception of a nasty smell," explained Marco Singer, Manager Sensory Performance at Symrise.

Expanding the range

The C'SCENT line, manufactured in Brazil, Germany, Singapore and the US, is available worldwide. "The existing product range already includes a large variety of odours and is adapted to all litter types: crystal, clay, scoopable, non-scoopable, natural and regular," says Marc Henry Lussigny, Odalia Director. "We can also develop customized solutions if requested."

Odalia is also developing a new range for the pet oral care and shampoo markets. It anticipates introducing this in 2019. ♦

♦ **Odalia**
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Schulze GERMANY

Exclusive products leading to success

Schulze supplies innovative, exclusive products for dogs and cats that ensure long-lasting customer loyalty. Its versatile, high-quality products stand out in the market.

Love for animals

What began with a simple love for animals is today an international company. This family-owned company, founded over thirty years ago, now offers a broad portfolio of high-quality, selected pet products ranging from healthy, nutritious pet food for dogs and cats, to unique snacks, and a large variety of robust toys.

Formula for success

In order to stay on the route to success, Schulze relies on a specially selected product range offering the highest quality. Great value is placed on environmentally friendly and resource-saving processing. The company pays special attention to the production of cat litter.

They supply everything from super-clumping bentonite litter to novel, patented mineral litter, and increasingly popular, environmentally friendly cat litter made from plant fibres, which

clumps can easily be disposed of in the toilet. In fact, the company is constantly coming out with new ideas.

Feed healthily

In manufacturing its pet food, Schulze sets great store by high-class ingredients. Porta21, its own brand of dry and wet food, contains only the best meat and selected ingredients. In line with its slogan 'Feed healthily, instead of just feeding until full' Porta21 stands for healthy, well-balanced nutrition for dogs and cats.

Another focus is on snacks that are highly digestible and different from what are currently offered on the market. Kitty's Cream, a cat snack that can be used as a reward or a food topping, is one of the company's most recent breakthroughs.

Yet all products are produced to the highest quality standards, without

animal testing. The focus is entirely on the wellbeing of the pets.

Ready for the future

Due to its close contact with animal lovers everywhere, and its worldwide presence, Schulze is quick to recognize trends and implement them in its business and production. A new company online profile has recently been established to provide retailers and consumers with more transparency. Schulze has built a global network with business partners and customers all over Europe, Asia, the US and the Middle East. The company is growing parallel to its portfolio.

The company offers many possibilities for cooperation, and exclusive partners are always welcome. ♦

♦ **Schulze Heimtierbedarf GmbH**
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THE NATURAL CHOICE

Imerys Absorbents

Unique and natural litters for pet owners around the world

A new business unit is born within Imerys, the world's leading company for mineral solutions, after acquiring the Danish company, Damolin.

A fruitful partnership

Damolin is known for its unique raw material, Moler, a highly absorbent material, only found on a few islands in Denmark. Damolin is also well known for its wide range of cat litter products. Imerys on the other hand, is a world leader in mineral-based specialties with focus on innovation.

Now that Damolin has become part of the group, as the Imerys Absorbents business unit, the combination is stronger than ever, especially when it comes to offering a widespread portfolio of quality products for the pet litter business.



Focus on innovative solutions

Imerys has 270 industrial sites in more than 50 countries and employs 18,500 people worldwide. The company generated a revenue of €4.2 million (\$5 million) in 2016 and launched 90 new products, including 18 with an environmental benefit.

The group supplies high value-added functional solutions to a great number of sectors, from process industries to consumer goods. In its ten Technology Centres around the world, Imerys focuses on innovation and develops new solutions to arising customer needs, based on

its scientific expertise, technological knowhow and mineral resources all over the world.

Moler – a raw material with benefits

Moler is a natural product deposited more than 54 million years ago. It is a unique combination of diatoms and clay, and the basic qualities are its ability to absorb, to retain and to insulate. The raw clay is calcined, meaning it is burned at approximately 750 °C; through this process, the product becomes sterile and the grains become hard and super absorbent, making them ideal for use in a cat litter tray.

Bentonite – a bestseller in the pet litter market

Both Imerys and Damolin have until now included the mineral bentonite as part of their portfolio for cat litter, but the strong new unit they now represent gives them a good starting point for presenting an even broader range of this popular clumping cat litter product.

Access to extraction sites all over the world, combined with many innovation centres, results in high-quality bentonite cat litter products, whatever colour, grain size and clumping ability is needed.

A strong private label partner

Damolin has always been a very strong partner when it comes to offering private label solutions to customers, and this will continue under the umbrella of Imerys Absorbents. The company has lengthy experience with all aspects of packaging development.

Imerys Absorbents is aware of the importance of a professional customer service, and is very keen to comply with the specific demands of the customer. ♦

♦ **Imerys Absorbents**
Sales-DK@imerys.com
imerys-additivesformetallurgy.com





Food, snacks, and ingredients

In this combined section, supplier management in relation to sustainability is one of the topics covered. How have supplier-buyer relationships evolved from those based on conflict to those based on partnership? Does this offer a greater scope for sustainability?

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Active treats: a welcome addition in weight management

In my previous articles on pet health, weight management and calories, I described the ongoing issues in our market. Where do we stand now?

Calorie control

Clearly, pet owners still do not understand how to control caloric intake in foods, treats, chews and supplements and how quickly their beloved pets can become overweight.

The food calories must be adjusted when edible treats and chews are offered to pets. A pet owner must maintain the proper level of daily calories for that pet's age, sex, health conditions and activity over different climatic conditions. If calories are not adjusted and nutritional balance is ensured, the

impact can lead to a higher risk of diabetes, heat intolerance, pancreatitis, cancer, hip dysplasia, skin and coat problems along with lethargy.

Today, the number of foods that are labeled for weight management are approximately 13% to 15% of the dog market and 8% to 10% of the cat market. These are labeled 'healthy weight', 'weight control', 'light/lite', and 'weight management'. They make claims of low fat and low calories. With 40% to 50% of pets classified as overweight in developed pet markets, the need for solutions intuitively seems much higher.

Most dog treats have been built specifically to connect the human to the pet – bonding them with resulting action of a reward.

Rewarding activity

Dogs are driven by their noses. It would seem to make sense to use the dog's nose to increase activity. Most dog treats have been built specifically to connect the human to the pet – bonding them with resulting action of a reward.

Since a dog will chase something it is interested in (by the call of its nose), the treat does not have to be handed to the dog (keeping it sedentary). Encouraging the dog to chase the treat or get involved with the treat increases the burning of calories.

Recent products have added the ability to have small treats come out of toys as the dog chases or plays with it. This increases the desire of the dog be active. Other edible, injection-molded treats (with high palatability) are flat and have become 'flyers' that can be tossed over short distances with the dog giving chase. If you can get your dog to love the taste and then chase it down, it still gives the impact of rewarding to the pet owner but encourages activity in the dog.

Stimulating curiosity

Cats are different. They are driven by shape, texture, mouthfeel and acidic flavours. Cats generally do not like soft-moist products that contain sugars so most cat treats have been made in a dry format. There are toys that can get cats moving and active; chasing or slapping after the movement.

Cats are notoriously curious yet they are less likely to get more active by treating. However, if the pet cat has grown up involved with their owner around food, the potential increase of activity chasing a tasty round treat increases. Similar to dogs, some toys that allow small treats to fall out occasionally can be an effective stimulant to increase play. Some have tried dangling string-type treats and making toys that shoot out treats to keep the focus of the cat.

Positive effects of L-Carnitine

If 'active' treats can be formulated with higher fiber to reduce calories and increase satiety, that is a major step to reducing calories intake while increasing activity. Beyond that, some consideration must be given to reducing the weight of the treat as even a low-calorie product is no good if it is too large for that particular pet.

Lastly, most are aware that L-Carnitine helps to burn fat calories and lay down muscle. It is used in the human market for that same reason. Including an efficacious level of L-Carnitine is another step to ensuring active treats help support weight management.

Finding the right balance

We fully understand that balancing foods with treats and chews is difficult for most if not all pet owners. There is no easy manual to follow and most products were built as singular products and not part of a larger food regime. Developing the attention of the pet with a rewarding and nutritionally focused treat is another option in our ability to reduce the health impact of overweight pets. ♦




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Paired vs. monadic: what is the difference?

The two main types of palatability assessment for pets are paired comparison (two-bowl) and monadic (single-bowl). Which one is better?

Tools

Palatability describes how pleasant a food or drink is to its consumer. Tools for evaluating human food palatability usually include verbal and written feedback from the tester. When evaluating the palatability of dog and cat foods, researchers must use different tools.

Pets provide feedback on their preferences through food consumption and behaviour. Factors that are often measured include which food is sniffed first, how much food is eaten, how quickly it is eaten, how the pet behaves before, during and after eating the food, and how pets eat the food over a period of many days. Researchers use this data to understand pet preferences and, in combination with other factors, make important decisions about pet food diets.

Two types of assessment

The two main types of palatability assessment for pets are paired comparison (two-bowl) and monadic (single-bowl). Paired comparison testing uses two bowls, where two different foods are presented. In monadic testing, only one bowl of food is presented. Which one is better? It depends on what question is being asked. The protocols for each assessment provide different insights and data outputs.

Protocols

Protocols can be tailored to a customer's specific need. The following information discusses the general protocols most widely used.

Paired comparison protocol

- test diets are the sole source of food and represent the daily caloric need of each animal
- most commonly 20 animals x 2 days
- bowls are switched to avoid side preference
- fed for a specific amount of time depending on the test
- first-choice data collected
- cats
 - RFID (radio frequency identification) system is used to automatically measure amount and frequency of consumption
- dogs
 - food scales linked to a customized programme for consumption data analysis
 - both bowls are removed when one is emptied

Monadic protocol

- test diet is the sole source of food and represents the daily caloric need of each animal
- sequential, controlling for order effect
 - day 1: diet A, day 2: diet B, day 3: washout (non-testing diet), day 4: diet B, day 5: diet A
 - provides within-subject, repeated measured data
 - inter-trial washout period (other) may be varied

- consistency of consumption, often used for in-home testing
 - 'X' days diet A, then 'X' days diet B, where 'X' typically varies from 7-30 days
 - only one diet may be fed during this period of time
 - longer testing period typically reflects better in-home setting
- respondents should be evenly distributed across all products as a starting point so there is an equal opportunity of seeing each of the products first

Insight	Paired comp.	Monadic
Evaluate discrimination abilities of animals	yes	no
Typical of an in-home setting	no	yes
Data vs benchmark*	CR, IR, FC	GC, TTE
Animal enthusiasm	no	yes
Acceptance	no	yes
Test equivalence of rations	no	yes

*Data definitions:
 (CR) Consumption Ratio: consumed A ÷ consumed B
 (IR) Intake Ratio: Consumed A ÷ (consumed B + consumed A)
 (FC) First Choice: % animals eating out of bowl A first
 (GC) Grammes Consumed
 (TTE) Time To Eat

Relevance

When evaluating which assessment is relevant to the data being generated, use the depicted chart as an initial guideline.

Defining what question you are trying to answer and what data you need to collect will typically point you to the correct assessment. Contact AFB International to assist you in the decision. ♦



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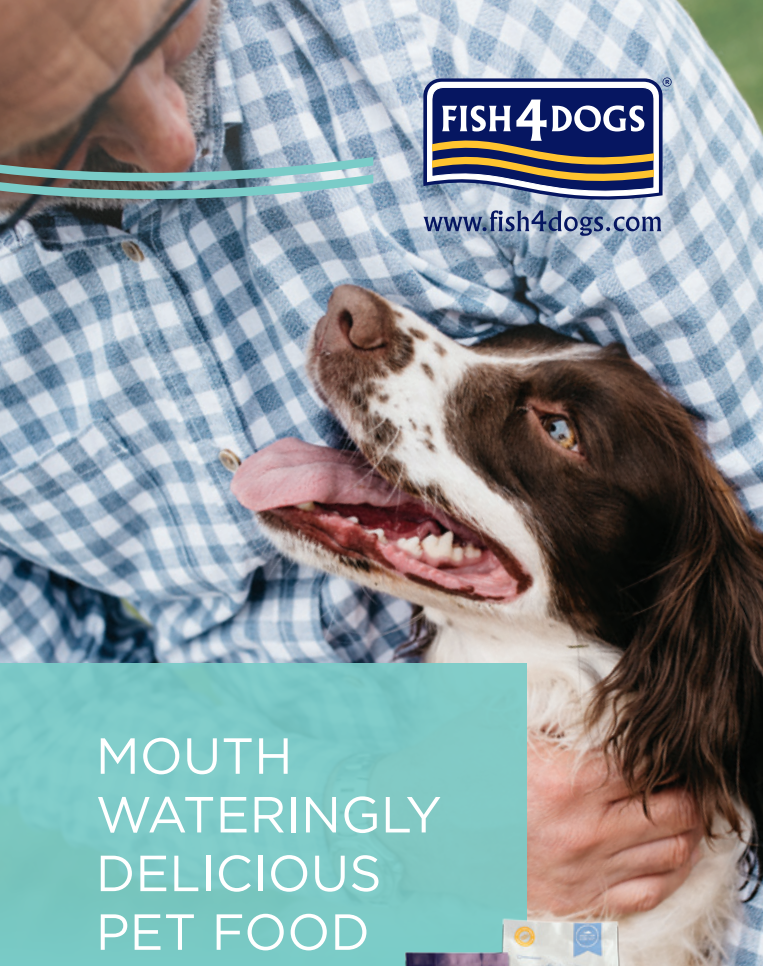
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Farm Company ITALY Naturally delicious

Delicious, natural and crunchy: these are the key points for Nature Deli, the special range of chewing toys from Farm Company, made only from vegetable sourced ingredients. 100% made in Italy, in line with the growing attention for a natural and 'green' selection of products. The use of OGM free and gluten free vegetable flours guarantees a highly digestible, premium quality range of chew toys, suitable for puppies and dogs with nutritional intolerances.

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The oils used in the YuMEGA® range include fish oil sourced from Norwegian farms with stringent ethical values, and seed oils (Borage, Sunflower and Flaxseed) grown, harvested, pressed and packaged in Staffordshire, just a couple of hours down the road from their HQ in the Hertfordshire countryside.

The all-natural supplements are helping to improve pets' lives around the world, and Lintbells is committed to look after the environment in return.

Lintbells Ltd.
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Dolina Noteci POLAND

Get to know us! Product quality care of Dolina Noteci

Dolina Noteci knows how to care about animals' palate. The team of experienced and qualified technologists watches over pet food recipes, their tastiness and positive influence on the organisms of dogs and cats.

As a trustworthy company, Dolina Noteci informs its customers about the composition of their pet food. Besides that, as one of few manufacturers, the company makes pet food research results available to the customer, conveying as much information regarding nutritional values as possible.

The quality guarantee of Dolina Noteci's pet food is embedded in the Quality Control sign placed on each product, which ensures that the pet food from Dolina Noteci has been carefully and strictly controlled at each stage. Therefore, raw materials undergo a multi-stage selection process and the production itself is monitored at all times.

Dolina Noteci
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The Palatability Performance People



Agras Pet Foods ITALY

Nature, quality, innovation

Agras Pet Foods was established in 1986 with the objective of giving pet food the same quality, care and attention paid to food for human consumption.

Global exclusiveness

It was the first company to launch single-portion, wet pet food with 100% natural ingredients, and continues to pioneer development of new flavours and formats. In the Schesir and Stuzzy brands, it exclusively services the pet shop channel, selling its products in more than 60 countries.

Two premium brands

Schesir wet pet food is made with 100% natural ingredients, without any added preservatives or colourings. It consists of a careful selection of the very best parts of the fish, caught in the open sea, and meat, that are steam cooked and hand processed.

Thanks to the latest restyling, Schesir has also become truly strong on the dry pet food front. It is formulated with natural ingredients, besides minerals and vitamins, without any added

preservatives or colourings, with a unique source of animal proteins, making it particularly suitable for all pet ranges. It has been nutritionally approved by the Department of Veterinary Medical Sciences - Alma Mater Studiorum Università di Bologna and is highly digestible.

Schesir was the first brand to integrate real pieces of fruit into its wet food line, instead of using mere extracts, thereby acknowledging the particular added benefits.

The Stuzzy branded range includes various types of products, featuring an excellent ratio of convenience in terms of price versus the quality of the ingredients. First of all, the percentages of meat are always the highest the market has to offer, it is very appetizing and never contain added synthetic colourings or preservatives.

Honest and ethical products

All the Schesir and Stuzzy products are cruelty free, that means no cruelty tests are carried out on any animal during any production phase.

Affinity with sustainability

Schesir wet uses seawater fish and it is also a dolphin safe brand. Tuna is sourced from sustainable initiatives; packaging is mostly made from recyclable materials and paper is largely recycled. Agras participates in offsetting projects in order to compensate the CO₂ emissions generated by the sleeves production. The company uses a Sustainability Balance Sheet, allowing it to report its performances from a social and environmental point of view. ♦

♦ **Agras Delic S.p.A. di unico socio**
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Since 1998

路斯 Luscious®



Listed Company Stock No.: 832419



Shandong Luscious Pet Food Co., Ltd

Tel: +86-536-5855263

Fax: +86-536-5855260

E-mail: xincheng@chinaluscious.com

Website: www.chinaluscious.com

Add: Advanced Industrial Park, Yangkou Town, Shouguang City (South of Zhongxin Road, East of Chuanbo Road), Shandong, China

Happy and healthy pets

Since its establishment in 1998, Shandong Luscious has been committed to continuously improving the lives of pets.

Improving pets' lives worldwide

Shandong Luscious Pet Food is one of the largest producers of dog treats and cat treats in China.

The company has products in more than ten ranges, with over 300 varieties on offer, which primarily concern dry meat ranges, dental hygiene ranges, biscuits ranges, canned food ranges, cat food ranges and extrusion products.

It has a staff of 2,300, and consists of six high standard processing workshops with capital assets of \$83 million (€71 million) and export sales of \$67 million (€58 million) in 2016.

As a professional pet food supplier, they mainly wholesale food and snack for dogs and cats, such as meat snacks, dental chews, and canned food. The company's aim is to produce more high quality products to make pets' lives more healthily and happily.

A state-of-the-art laboratory

All raw materials used come from CIQ certified farms. The ingredients are absolutely free from medical residue and additives, and all chicken and duck breast meat is guaranteed to be 100% natural. Also the company has its own 20 chicken farms, ten duck farms, two chicken slaughter factories, and three duck slaughter factories.

Shandong Luscious has a state-of-the-art laboratory which is equipped with gas chromatography and liquid chromatography as well as a equipment for medical residue and microorganism tests, thereby achieving comprehensive quality assurance throughout the entire production process, starting with farming and slaughtering up unto processing.

Intensive research

Shandong Luscious' Product Scientific Research Institute employs a total

number of fifteen researchers, who have several years of work experience in international pet food research.

The company independently designed and registered twelve types of dog food, such as chicken wrapped cow skin, rawhide sticks wrapped with chicken and chicken plait.

Market position

The majority of the company's products are exported to Japan, the US, the EU, Canada, South Korea, Russia, Hong Kong, Malaysia, Thailand, Singapore and other countries and regions, with an annual export turnover of \$650 million (€559 million). ♦

- ♦ **Shandong Luscious Pet Food Co., Ltd.**
xincheng@chinaluscious.com
chinaluscious.com



Supplier management and sustainability

The evolved supplier-buyer relationship, based on partnership, offers greater scope for sustainability. Mutual benefit is the keystone.

Supplier-buyer relationships

Although 'grain free' products are popular, wheat remains an important raw material for the global pet food industry. How a manufacturer buys wheat illustrates how supplier-buyer relationships have evolved from those based on conflict to those based on partnership and that offering greater scope for sustainability. This fictitious but realistic case study, demonstrates what needs to be done to ensure sustainability through supplier management.

Take it or leave it

Trading relationships vary depending on external, mitigating factors over which neither the supplier or buyer has any direct control. In times of high crop yields, the relationship might have been one of the buyer saying: "I will give you \$150 / tonne. Take it or leave it." In times of shortage, the reverse is also true: "The price is \$160 / tonne. Take it or leave it."

This illustrates the adversarial nature of the relationship, with each trying to benefit financially depending on the situation and one where there is a lack of trust.

The Chartered Institute of Procurement & Supply (CIPS) characterises this type of relationship as: "Buyer and supplier are 'opponents', each striving to obtain advantages at the other's expense. There is little trust, communication and cooperation, and there may even be conflict." Such relationships are not sustainable, as both parties are not looking for a win-win outcome.

Long-term relationships

However, consider the scenario where the grower has to mechanically dry the cereal due to wet weather. This increases the grower's production costs. If the buyer offers a bid price that is uneconomical, the grower will make a loss.



Some experts compare supplier-buyer partnerships, built on mutual trust, with the development of interpersonal relationships that might result in marriage.

in general terms these are characterised based on the agreement to collaborate closely for the long term, and sharing ideas and information. “There is a very high level of trust and the aim is to find solutions that benefit both parties without detriment to either.” (CIPS)

Underlying these changes is the evolution away from often adversarial buyer-seller relationships into those built on the principles of ‘relationship management’ or ‘supply and value chain management’ built on mutual benefit.

Mutual trust

Some experts, like the American Society for Quality (ASQ) compare supplier-buyer partnerships, built on mutual trust, with the development of interpersonal relationships that might result in marriage. Their ‘Supplier management handbook’ shows these developing in stages:

1. Supplier selection (blind dating) – after exploratory communication and meetings with potential suppliers, an initial contract is signed
2. Preferred supplier (going steady) – confirmation of initial feeling for both parties, leading to limited commitment with the preferred supplier
3. Longer term commitment (engagement) – based on performance, longer term commitment with the preferred supplier is considered
4. Long term contract (marriage) – exchange of long term contracts; relationship deepens with partnership in projects e.g. new product development
5. Lifelong partnership – supplier and buyer work together for mutual benefit; no apportioning of blame with both parties working together to resolve the issues when things go wrong.

Whilst the grower might accept losses in the short term, the position will be unsustainable long-term. Given changing weather patterns, this situation could exist over many years and may result in the farmer no longer growing wheat or going out of business.

In this scenario, the buyer-seller relationship ends due to a failure to ensure sustainability and the buyer is left with a supply problem.

Evolution of supply chain management

Whilst these adversarial relationships might still exist, there has been an evolution towards more sustainable foundations. This change has been driven by

- Fewer resources at the pet food manufacturer to look for and negotiate with sellers
- Consolidation and rationalization in the market with fewer suppliers

Consequently, there has been a move towards relationships that are more sustainable and are built on partnerships. Whilst many types of partnership exist,

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Returning to the example of buying wheat, development of a partnership can bring mutual benefits. Longer term contracts allow the wheat supplier to invest in more efficient ways of growing wheat. The outcome might be increased yields of better quality wheat, a situation that has mutual, more sustainable benefits for both buyer and supplier.

Embrace working together

The concept of working together for mutual benefit is widespread around the pet food manufacturing industry and supply chain at regulatory and operational level.

This concept underpins the ways of working of many pet food manufacturing industry associations global, for example PFI in the US, PFMA in the UK and at global level Global Alliance of Pet Food Associations (GAPFA). At corporate and operational

level, examples of this way of working are seen in the concept of 'Mutuality' one of the '5 Principles of Mars' used globally around Mars Group. The concept also extends into the raw materials and packaging supply chains where companies like the global agri-feed corporation Cargill and the international packaging group Mondi have implemented this business ethic and way of working.

We live in a fast-paced world of constant change. Those that adapt and evolve to change are more likely to survive. Those that do not adapt and embrace critical concepts like mutual benefit and sustainability are less likely to survive. ♦



David Primrose

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China

This section highlights the booming Chinese pet market, which is seeing rapid value growth due to pet population growth and the premiumization trend. China is quickly changing from an imitator to an innovator. How does this impact the pet industry?

Pet care in China	54
Facts and figures	56
Collar UKRAINE	58
China. From imitator to innovator	60

Gosbits

Delicious natural snacks made with only fresh meat and fish, they are the best daily reward for a dog, as well as the ideal diet complement due to their variety and dental care

70% Fresh ingredients

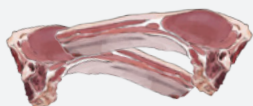
Fish



Chicken



Lamb



Wild



Dental Care



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70% of Fresh Meat and Fish



Grain and Gluten Free



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Natural preservatives



Amazing natural Palatability



Dental triple action formulas



300g



Pet care in China

Pet care booms due to pet population growth and premiumization

A fast expansion

Pet care is set to witness rapid current value growth in 2017 due to pet population growth and the pervasive premiumization trend. On the one hand, alongside increasingly busy lifestyles and growing work and home pressures, more consumers are adopting pets as companions and to help relieve stress. On the other hand, consistently rising income levels and growing sophistication in terms of pet care encourage owners to choose premium products. This premiumization trend is fuelling the fast expansion of pet care in China.



Product innovation and development

The increasingly strong emotional connection to pets encourages manufacturers to innovate and develop products by empathizing with pet owners. Higher awareness of food safety and health sees owners move towards pet food made with fresh ingredients and healthy additives. In addition, manufacturers introduce treats, similar to snacks for humans, to satisfy the various dietary needs of pets.

Domestic players versus foreign competitors

Domestic players, in line with a booming market and aided by internet retailing, developed fast to compete with multinational players in 2016, which used to overwhelmingly dominate pet care in China.

Although foreign players Royal Canin Au Yu (Shanghai) Pet Food and Mars Foods (China) continued to occupy the first two places in terms of retail value sales, local players, led by Shanghai Bridge Petcare, gained shares through rapid product innovation and competitive pricing.

Internet retailing develops fast

Internet retailing, which benefits from the convenience trend and wider accessibility, is set to continue to close the gap on pet shops in 2017. Listing a comprehensive selection of pet care brands and products, internet retailing allows consumers to compare and contrast prices, formulas, ingredients and packaging at the same time. Besides, fast developing delivery services contribute to the boom in internet retailing in pet care.

Robust growth is expected

Pet care is expected to sustain dynamic retail value growth at constant 2017 prices over the forecast period. Growth is fuelled by the steadily rising pet population and developing premiumization trend. Thus, it is anticipated that premium dog and cat food will register the strongest value growth rates. ♦

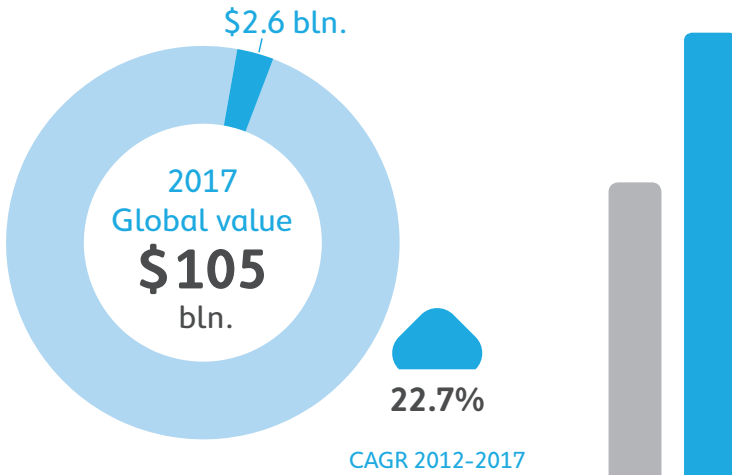


Paula Flores

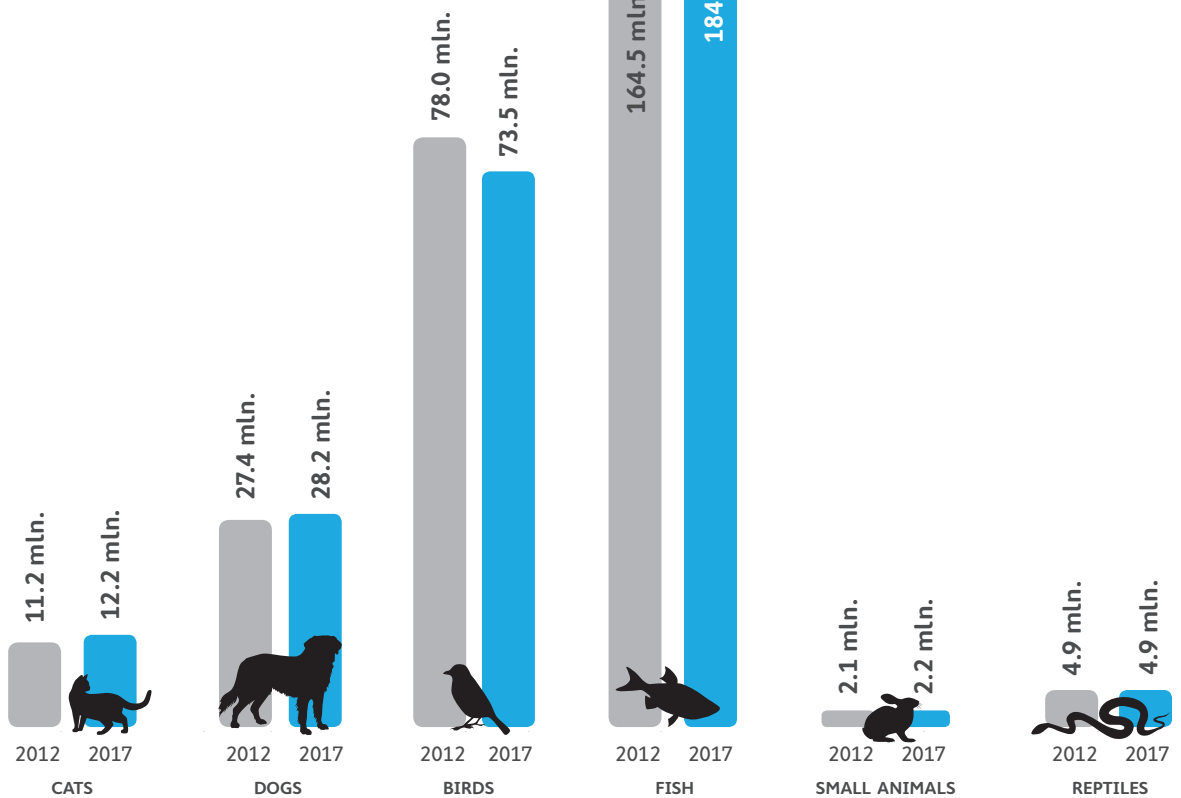
Head of Pet Care, Euromonitor International
paula.flores@euromonitor.com
euromonitor.com

China

Industry value and growth rate

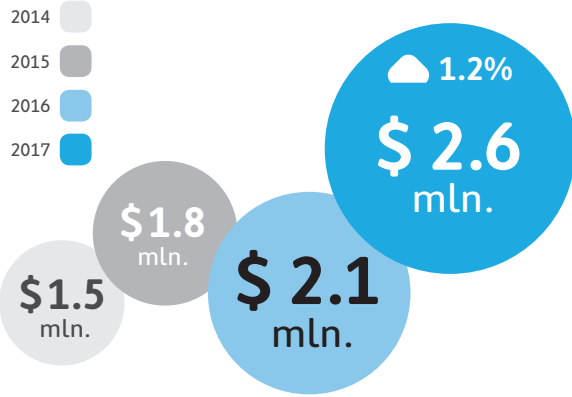


Pet population



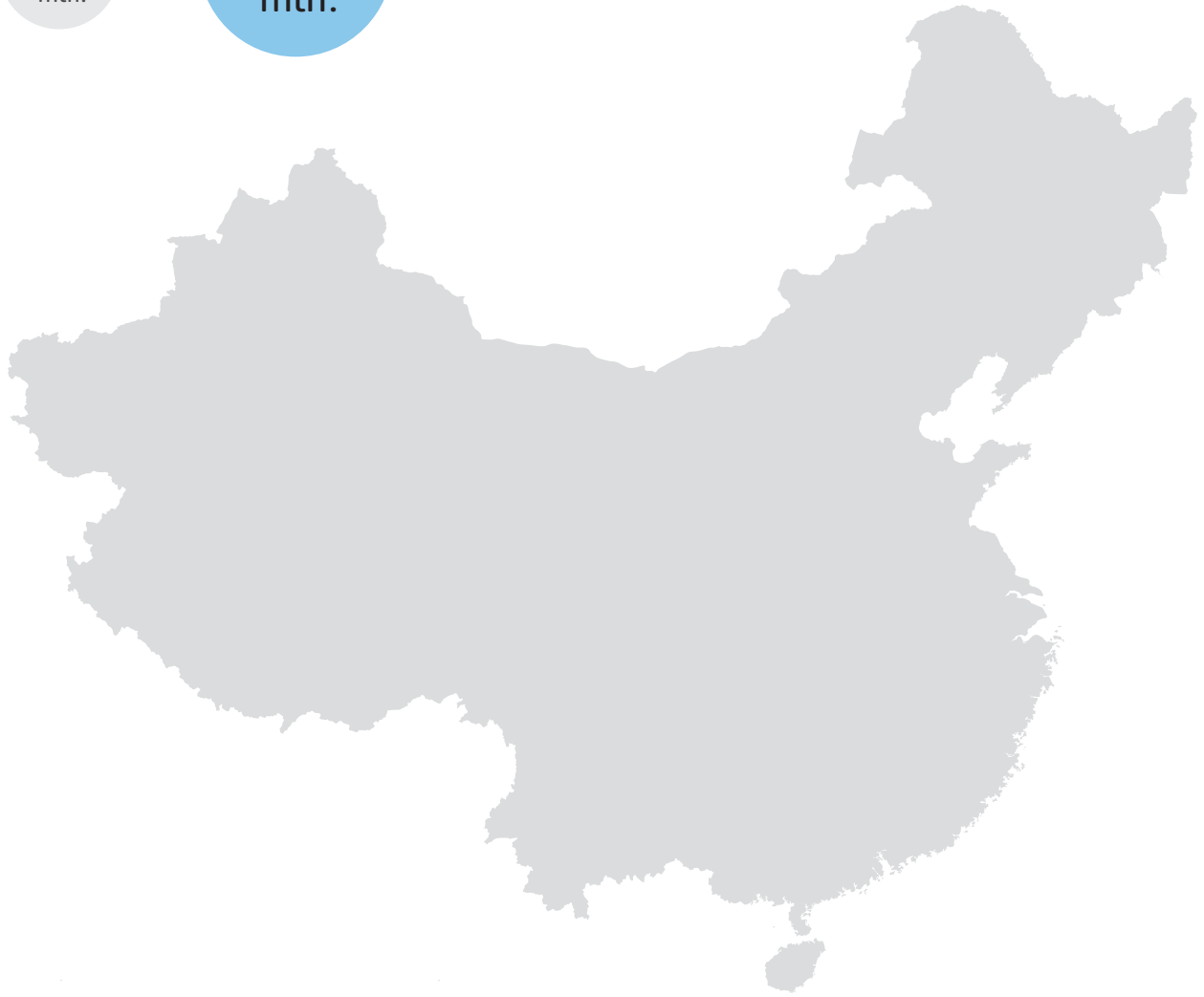
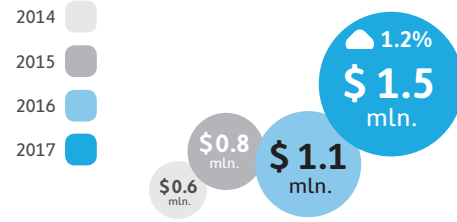
Market size pet care

Retail value RSP | Fixed 2017 exchange rates



Market size pet food

Retail value RSP | Fixed 2017 exchange rates



Source:  EUROMONITOR INTERNATIONAL

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COLLAR UKRAINE

Dao Puller: Five steps to success



Each significant player in the pet market, whether a brand or company, has its own positioning and success. This article takes you through the five steps to success as they have been taken by the Ukrainian COLLAR company.

1. Innovative product

The Puller brand, which represents COLLAR, is quite simply unique, and has already won the recognition of consumers all over the world, even in such an extraordinary country as Japan. The functional uniqueness of Puller is being the dog training tool, and its mission is to solve canine behavioural problems and improve the understanding and

relationship between owners and their dogs in a new way.

2. Successful branding team

The brand positions were strengthened by the international team of partners and ambassadors among amateur canine trainers (Europe, Canada, US, Russia, Ukraine). They created and developed an international movement: the Dog Puller



International Federation with Dog Puller championships. As a result, this lively sport gained worldwide popularity within a couple of years.

3. International recognition

The lead of Puller to the international market became possible following its successful presentation at the world's largest exhibitions – Interzoo (EU) and Global Pet Expo (US).

Later, the Collar company represented Puller at the InterPet Expo 2013 in Japan. Since then, the Dear Children company became official Puller distributor.

4. Community and marketing

Contrary to standard marketing techniques, Puller was not introduced through simple advertising and PR in mass media. Instead, the main emphasis has been on education around the product and training in Dog Puller Sports for professional trainers.

The latter is particularly important because ultimately, consumers trust the opinion of dog trainers, so that their understanding of the product and its mission helps to promote Puller values and significance. Support of opinion leaders has been won – it is the first significant achievement of the distributor.

The second is the development and implementation of Puller event marketing, training and certification of trainers, and the implementation of Dog Puller competitions and festivals throughout Japan.

This has proven the most productive method of winning the attention and loyalty of end consumers. In 2017, a new record was set when approximately 200 Dog Puller competitions were staged in Japan alone.

The creation of a Puller community provides a strong foundation for the product's popularity among dog owners. This long-term marketing strategy, where the distributor pays attention to informing the audience about the product's mission and sporting qualities, is already producing results.

5. The 2020 Olympic Games

In 2017, the 'Committee of the Olympic Games for animals', which included key people from the international Interpets Exhibition, as well as influential players from the Japanese pet industry, took the initiative to organize the Canine Olympic Games 2020 that will be held immediately after the main Olympics.

The Committee of the Olympic Games for animals decided to include Dog Puller in the sports competition programme along with such subjects as dog frisbee, agility, freestyle (dancing with dogs), canicross, et cetera – a phenomenal achievement.

Next step

Next, the COLLAR company and its partners plan to inform the market of the Puller mission: solving canine behavioural problems and improving the understanding and relationship between owners and their dogs. Thus, the pet business can become socially responsible, can develop the welfare of domestic pets, and can trigger societal understanding of their basic needs. ♦

♦ **COLLAR Sp.z.o.o.**
export@collar.ua
puller.com



China. From imitator to innovator.

China has the reputation to imitate but times are changing.

A global driver

A few years ago, the Chinese government determined in the well known five-year plan that China has to become a global driver of innovation. Based on this government policy, the leading Asian exhibition CIPS has taken the initiative to create an Innovation Platform for the pet industry.

Why the Innovation Platform?

Innovation is becoming vital for the pet industry. Pet retailers need innovative products to compete with hyper-/super markets, but also especially to create a competitive edge in order to make the difference in the omnichannel world. Nowadays, consumers have high demands and orientate themselves on the internet (and via social media), a channel that builds and erodes reputations.

In addition, society driven factors stimulate innovation. The Paris climate agreement forces all of us to put sustainability high on the agenda. Implementation requires a new way of looking and thinking, which is again a demand for innovation. Also, technical developments such as 3D-printing, nanotechnology, alternative protein sources, big data, et cetera are sources for innovation with a lot of opportunities for the pet industry.

Innovation is a necessity

To make this a success, companies will have to organize themselves differently. How to stimulate creative thinking? How to implement innovations in a new way? This was the main topic during the last GlobalPETS Forum Asia.

This Innovation Platform was started on 15 November, the evening before this year's CIPS. On this evening, all main CIPS clients were invited to a VIP meeting where the Innovation Platform was launched.

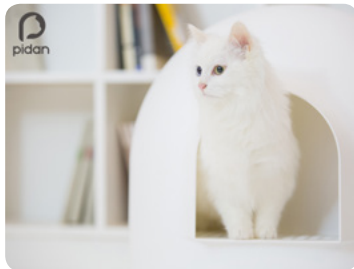
How to establish the Innovation Platform?

In order to establish the Innovation Platform, several initiatives have already been taken. This includes:

- In 2017, four young companies who started profound innovations in the pet industry won the Pet Company Innovation Award. In the next years, this Award will be continued.
- During every CIPS event, the Pet Product Innovation Award will also be handed out. The jury is formed by industry experts as well as the public in order to guarantee that true innovations are rewarded.

In our next publications, we will follow up about more news and further steps.

Pet Company Innovation Award 2017



pidan

pidan was founded in Paris in 2014 and specializes in product design for cats. They uphold the purpose of

'full of goodwill, creative, brave and stable'. Not only does pidan want to provide cat lovers with useful, special and irreplaceable products, but also believes their products make raising cats more convenient and scientific, offering a much more pleasant living experience for both cats and cat lovers. pidan is committed to serving animals all over the world to create a better future for the coexistence of human and animals.



Himalayan

Himalayan Pet Supply began in 2003 based around the company's first product; the Himalayan

cheese chew named 'Himalayan Dog Chew'. It was discovered to be a pet favourite when the two friends Nishes and Suman Shrestha realized that Nishes' dog Kaos loved the hard cheese traditionally made for people in the Himalayas. By 2016, Himalayan Dog Chew was a leader the industry. They expanded the business in other pet categories as well, transforming the company from a single product-oriented business to 'Himalayan Pet Supply'. Now they also offer retailers treats, toys and gear.



PETKIT

PETKIT is a high-tech company dedicated to design and produce smart products for pets. Founded in

2013, the company has rapidly developed into one of the leading technology firms in the pet industry. The PETKIT app was created to support the PETKIT products system, to link all different scenes in a pet's life. The focus is on helping pet owners to take care of their pets more easily to enhance the petkeeping experience and lower the feed complexity. To make every pet lover own their favourite adorable fur baby is PETKIT's striving direction.



Yumax

Yumax is a very young brand. 'The easier, the happier!' is the core concept of this company.

Unlike traditional manufacturing

companies, Yumax pays more attention on organism breeding and technological innovation, hoping to guide the hardware development through optimizing the breeding technology, and create simpler and more user-friendly products through the combination of hardware and software, so that more people can easily enjoy the fun of aquarium breeding. ♦

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Beeztees
THE NETHERLANDS
New cushions from Beeztees!

Beeztees has added a whole new range of cushions to her assortment. An example is the ZigZag cushion range, which looks great in any interior. The denim fabric makes the cushions timeless! You can create different looks because the cushion is reversible so you can use it with the zigzag print or the neutral denim colour facing up. The ZigZag cushion range is available in different sizes.

Beeztees
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Collar UKRAINE
PULLER is an interactive dog fitness tool

Available in five sizes for all dog breeds. Even puppies can have the best training. PULLER is made of a unique material that is harmless for dog teeth, lightweight, durable and it floats. The product accompanied with one-of-a-kind set of exercises that helps the owner to build a bond and workout a pet in a most effective way. Twenty minute training with PULLER is equal to five kilometers of running.

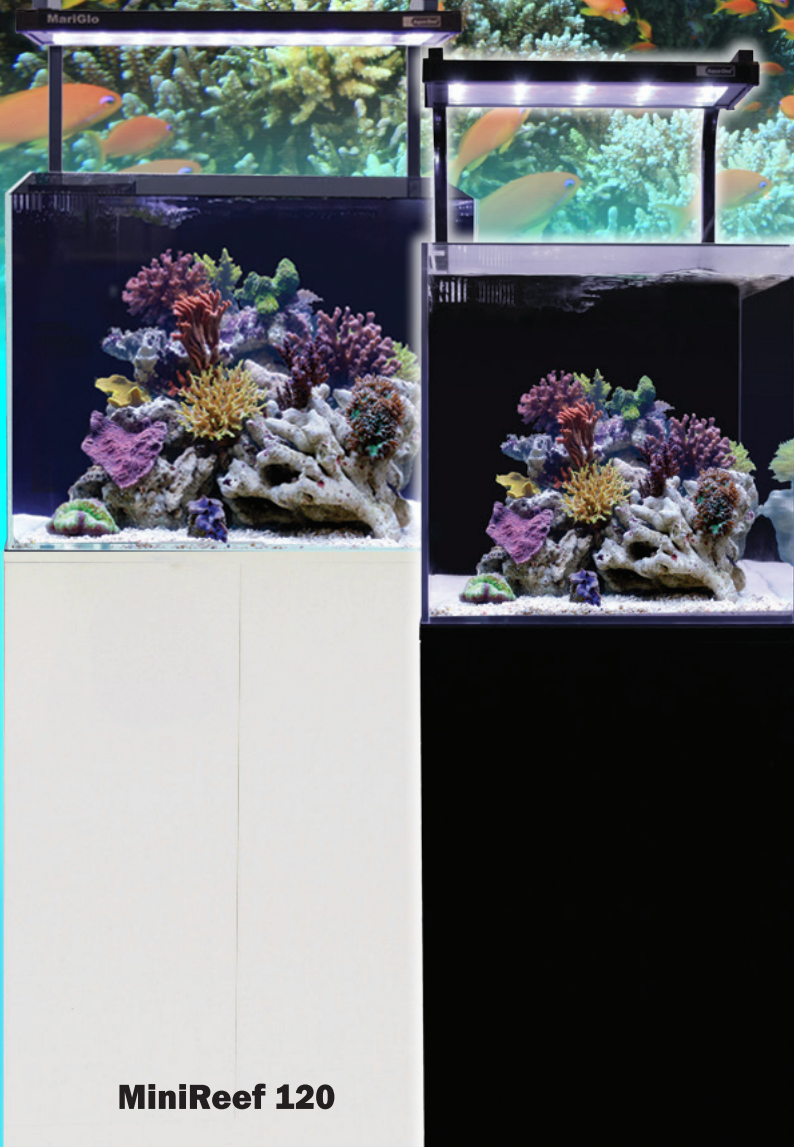
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Calendar of events



GlobalPETS Forum Europe 2018

24 to 26 January 2018
Hilton Molino Stucky Venice,
Venice, Italy
globalpetsforum.com



Iberzoo 2018

15 to 17 March 2018
Feira de Madrid, Madrid, Spain
ifema.es/propet_06



PATS Sandown 2018

20 to 21 March 2018
Sandown Park Exhibition Centre Esher,
Sandown, Surrey, United Kingdom
patshow.co.uk



Global Pet Expo 2018

21 to 22 March 2018
Orange County Convention Centre,
Orlando, FL, United States
globalpetexpo.org



Interpets Asia Pacific 2018

29 March to 1 April 2018
Tokyo Big Sight, Tokyo, Japan
interpets.jp



ZooVetExpo 2018

17 to 19 April 2018
International Exhibition Centre, Kiev, Ukraine
zoovetexpo.com



World of Pet Supplies 2018

20 to 23 April 2018
Hong Kong Convention and
Exhibition Centre,
Hong Kong
hktdc.com



Interzoo 2018

8 to 11 May 2018
Exhibition Centre Nuremberg,
Nuremberg, Germany
interzoo.com

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