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Snacks and treats

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India

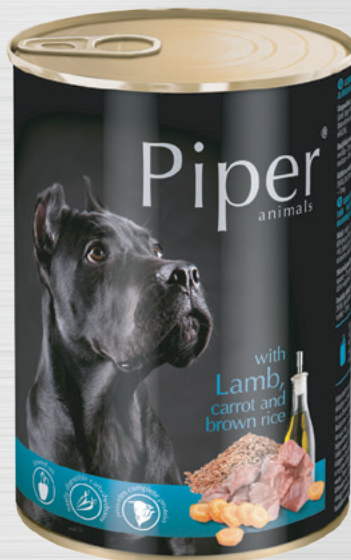
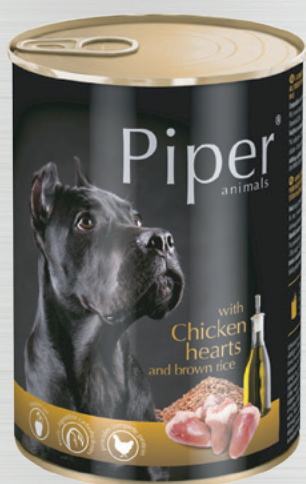
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What's gone before and what's to come

Time flies when you are having fun! And as 2018 edges towards 2019, our 30th anniversary year comes to an end. This issue has the final section on 30 years in the pet industry and focuses on technological developments. Some years ago, hardly anyone was talking about the internet of things (IoT). Today's IoT applications are a very interesting product segment. And forecasts show serious growth in this area ... in the not too distant future!

2018 has been another year of mergers and acquisitions in the industry. We have reported on online platforms – big and small. Online is gaining an increasingly firm foothold. Its market share is set to become substantial in the years to come and we expect it to be a real changemaker for the pet industry. It is no longer a question of whether Amazon or Alibaba will enter the market, as we know their ambitions. The question now is: how fast will market penetration be?

How will traditional companies react to the growing influence of online sales? What is needed is innovation. We have all noticed the effect start-ups are having on the pet industry. So in this issue we look at the top ten European start-ups of 2018 and at the latest trends in petcare.

What are 'correct' prices for your products? With competition becoming fiercer all the time, pricing is a crucial part of your strategy. In our marketing section, you can read a very interesting article on how to approach pricing.

India was always known for its market in leather leads and metal feeding bowls. But the country's pet market is expanding fast. So it was definitely time to put the spotlight on India: the trends and the emerging companies.


Corine van Winden, CEO



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** Study conducted by the Royal Veterinary College. Data on file



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Upcoming issue | Advertising deadline: 7 December 2018 | Publication date: 18 January 2019
Contact head office (see page 80) or local representatives (see page 79).



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Correspondence may be edited for clarity or length.

Fressnapf Group opens 1500th store

Fressnapf Group recently opened the 1500th Fressnapf Maxi Zoo store – in Paris. France is an important market for the Fressnapf Group. “With more than 150 stores and annual sales of around €180 million (\$206 million), it will be the second-largest country in the group this year. In addition, the French organisation has doubled its workforce over the past five years. Around 1,000 people work full-time or part-time for Maxi Zoo,” says Jan Wejbrandt, Managing Director of Maxi Zoo France. A total of 34 new branches have been opened in France so far this year – at least 15 more will follow by the end of the year.

In total, well over 100 new Fressnapf and Maxi Zoo branches will be opened in Europe this year. Annual turnover will break the €2 billion (\$2.3 billion) mark for the first time. Growth will be driven, in particular, by the rest of Europe. In Germany, both bricks-and-mortar and online sales are growing disproportionately fast. The online shop, which is already up and running in Germany, Switzerland, Luxembourg and Denmark, is to be rolled out throughout Europe in the coming years.



Peter Pritchard, CEO

Pets at Home expands its board with new COO and CDO

Pets at Home has appointed two new board members:

1. David Robinson as Chief Operating Officer
2. Robert Kent as Chief Data Officer

David Robinson has a wealth of experience in the retail industry, including the past two years as Managing Director of Bestway Retail. David also spent 15 years at Home Retail Group, most recently as Chief Operating Officer for Argos, where he ran day-to-day operations and played a key role in the digital transformation of the business. He has also held senior roles at Homebase and Dixons Retail.

Robert Kent has worked at Royal Mail as Chief Data Officer for nearly eight years, and prior to this he was head of program delivery. His experience also includes senior roles at Carphone Warehouse, including head of IT, as well as strategic roles at Epiphany UK and Capgemini.

“These two important senior level appointments will be critical to achieving our goal of becoming the world’s best pet care business,” Pets at Home Group CEO Peter Pritchard said.

PETKorm opens new pet food plant in Russia

The new factory will produce various kinds of wet pet food for dogs and cats. Packaging will vary from cans, pouches and sausages to other current packaging methods. Over ₺2 billion (€26.6 million / \$30.4 million) has been invested in the plant, which is 10,400 sqm in size.

Plant capacity is said to be 10,000 tonnes a year, which is approximately 200 units per minute. This volume should cover at least 3% of the Russian wet pet food market. Both its own brands and private labels will be manufactured at the new plant, which is located in a Moscow suburb and will create 80 new jobs in the area.



PIDA introduces new president

The Pet Industry Distributors Association (PIDA) announced it has selected Celeste Powers, CAE, as its new president. She will begin her tenure as the association's chief staff executive on 5 November 2018.

Powers will succeed Steve King, who leaves PIDA early January to assume the role of CEO of the American Pet Products Association (APPA).

Powers has been in non-profit association management for 27 years, with nearly 20 years in executive director roles. "I am thrilled to be joining this fabulous organisation and to work in an industry that I am passionate about," she said.



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Darling Ingredients makes pet food acquisition

Darling Ingredients is continuing to invest in the pet food industry as it recently announced the acquisition of most of the assets of Triple – T Foods Arkansas. The deal includes a cold storage operation in Arkansas and a wet pet food ingredient production facility in Springdale, both in the US. Darling's Dar Pro Ingredients subsidiary produces ingredients for many of the pet food industry's largest brands. Terms of the deal were not disclosed.

"Triple – T Foods is an excellent strategic fit with Darling's growing specialty pet food ingredient portfolio," said Randall Stuewe, Darling Ingredients chairman and CEO. He said the acquisition is expected to increase its customer base by supplementing the company's other wet pet food facilities in Kentucky and Nebraska.

"Triple – T has established a long history of providing quality proteins for the high-end pet food markets, and we look forward to building upon that reputation," said Stuewe.



Natures Menu wins two Pets at Home Supplier Awards

Raw pet food manufacturer Natures Menu has scooped two awards at the Pets at Home Supplier Awards.

As the first-ever business to be awarded two accolades, Natures Menu was named Supplier of the Year and winner of the Best New Launch, as well as being shortlisted in the Best Multi Channel Supplier and Best Account Team categories.

As the Supplier of the Year, Natures Menu was highly commended for its overall performance and innovation contribution to the pet food market. Whilst in the Best New Launch category, the judges praised the business for the launch of its new innovative and premium product range True Instinct.



Rinaldo Franco (Italy): new headquarter

A few years after their 60th anniversary Rinaldo Franco Spa inaugurated its new headquarter close to Milan.

The building occupies a surface of 13,000 sqm, four times bigger than the previous one based in Via Kulisciuff in Milan. The building has been bought and entirely renewed both outside and inside, for a total expense of more than €5 million (\$5.7 million). The site hosts the offices for the trading staff, the graphic department, a wide show-room and three meeting rooms, as well as a vast central warehouse of 5,600 sqm, which permitted to unify the stock of goods that previously were placed in different logistic warehouses.

The shelves used in the warehouse have been studied to optimise routers, spaces and times of picking up. The new structure 'drive in' dedicated to the bigger articles permits a more intensive storage of goods if compared to the previous facility.



Tom & Co duo Lionel Desclée and Thierry le Grelle take on new roles

Two years ago, Lionel Desclée and Thierry le Grelle started the process of making the Delhaize Group pet retail chain Tom & Co an independent company. They positioned Tom & Co as a separate brand, determined its new strategy and installed operational teams for IT, accounting and logistics.

The result of these changes has been immediately noticeable to customers: Tom & Co doubled the number of retail outlets in France, created new services and launched an innovative instore concept that enhances customer experience.

The shops in Braine l'Alleud, Nantes, Marche-en-Famenne, and those soon to be opened in Knokke and Overpelt (Belgium), are perfect examples of this innovation strategy. Sales teams have been expanded and trained to give better advice to pet owners. Turnover has now increased and brand recognition has improved. Tom & Co is ready to work on its European development.

On 1 January 2019, as Tom & Co embarks on the second chapter in its young history as an independent company, Lionel Desclée is leaving the management team to take on a new operational challenge at a leading international retailer in Asia. He will continue as a member of the Tom & Co board, with a strategic and coaching role. Thierry le Grelle, now CFO, will replace Lionel Desclée as CEO of the group. Both men will remain group shareholders.



Snellman bought Fodax in Sweden

Snellman has bought dog food manufacturing company Fodax in Sweden. The family business located in Nässjö, Southern Sweden, manufactures frozen rawfood and freeze-dried snacks for dogs.

Snellman group operates in the food processing industry and has been involved in the pet food industry through their MUSH-brand. Purchasing Fodax will strengthen their position in the industry.

Some reasons for the transaction are:

- Purchasing Fodax will give Snellman the opportunity to expand their business in the pet food industry as they will now obtain a new brand in the frozen rawfood market. It is a vastly growing market sector and through Fodax they will reach consumers who are not the primary target group of MUSH.
- The turnover of Fodax is approximately €1.3 million (\$1.5 million). The company has eight employees.
- Fodax has strong product know-how and excellent channels to local raw materials for the Swedish market.

"Together we will achieve a prominent position in the market," says MUSH CEO Magnus Pettersson.



Mars acquired AniCura

The European Commission has approved, under the EU Merger Regulation, the acquisition of AniCura, a veterinary clinic chain, by Mars, a supplier of pet food, including dietetic pet food. The approval is conditional on the divestment of AniCura's VetFamily business.

AniCura is active in several EU Member States (Austria, Denmark, France, Germany, Italy, the Netherlands, Spain and Sweden). AniCura also owns VetFamily, a purchasing organisation for independent veterinary clinics. VetFamily is responsible for negotiating framework contracts for the benefit of its member clinics, including for the procurement of dietetic pet food.

The EU Commission examined the effects of the proposed transaction on the retail market of dietetic pet food sold by veterinarians.

The Commission was concerned that the transaction, as originally notified, would have enabled Mars to shut out its dietetic pet food competitors from the downstream retail channels, namely the AniCura veterinary clinics and the VetFamily member clinics. This concern related to Denmark

and Sweden where AniCura and VetFamily together account for a very significant share of sales of dietetic pet food.

As a result, the EU Commission was concerned that the transaction could affect the ability of other producers of dietetic pet food to compete with Mars. This could have resulted in higher prices, less choice or lower quality, as well as in a reduction in innovation in dietetic pet food.

The Commission found that no competition concerns would arise in the other countries where AniCura and VetFamily operate because a much smaller share of overall sales of dietetic pet food is sold in their clinics there.

To address the concerns, Mars offered to divest AniCura's VetFamily business in its entirety in the whole of Europe. As a result Mars will not be able to influence the purchasing activities of the clinics belonging to VetFamily. Instead, this business will be subject to competition from competitors to Mars.

The Commission concluded that the proposed transaction, as modified by the commitments, would no longer raise competition concerns.



Premier Nutrition raises the bar of premix manufacture

Premier Nutrition's £13.1 million (€14.9 million/ \$17.5 million) investment in its new production facility in Staffordshire (UK) takes it to the forefront of premix manufacture. In the company's most automated factory to date, they are bringing the integrity and rigour of the consumer food industry to the pet food industry. Premix is a critical component in pet food manufacture and product safety is paramount.

"From the global sourcing of premix ingredients to the despatch of a finished product, Premier Nutrition is committed to being leaders in risk management, giving our customers confidence and peace of mind," says Chris Rackham, General Manager of Premier Nutrition.

The new factory expands the company's production capacity by over 50,000 tonnes/year, adding to existing facilities at the company headquarters in Rugeley.



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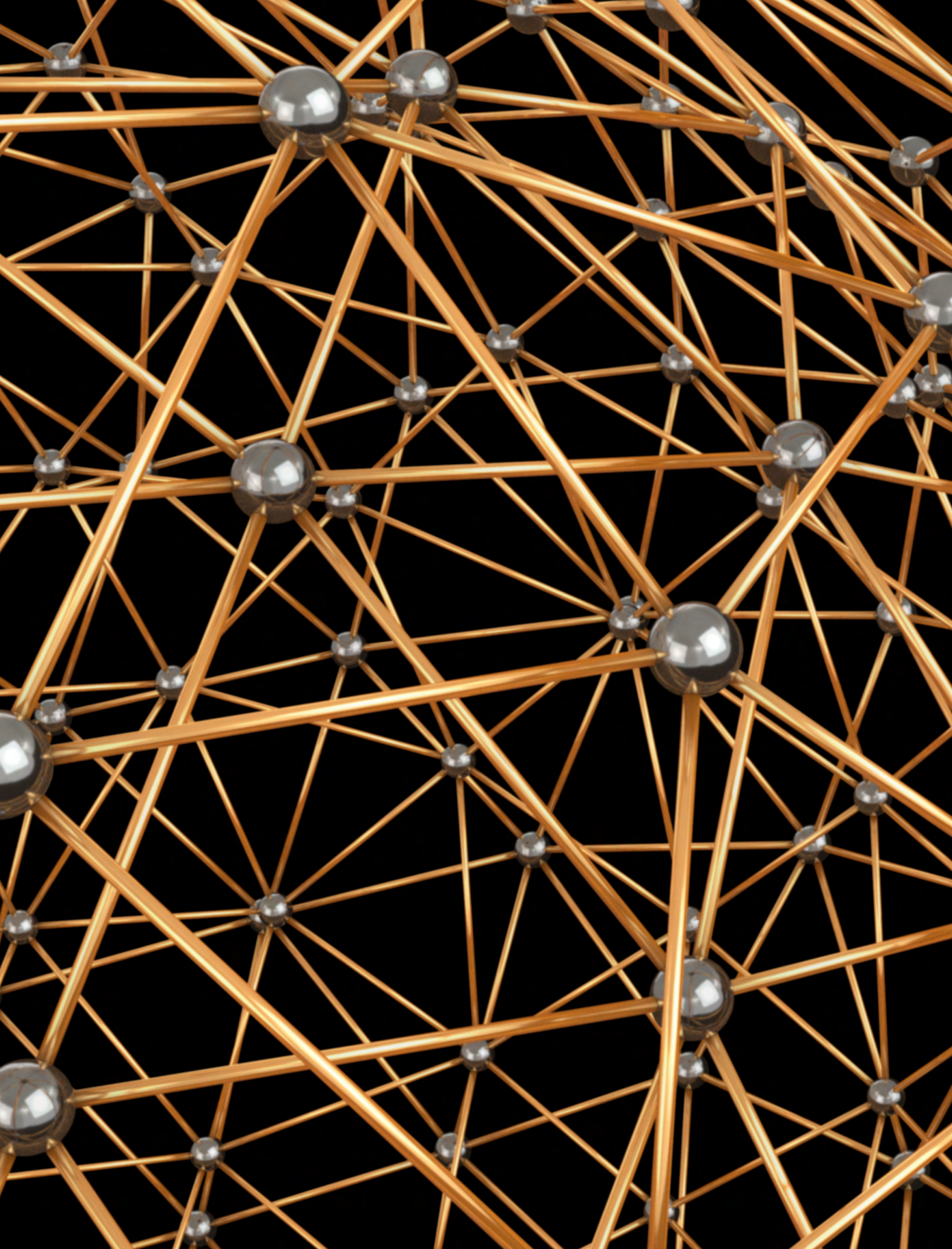
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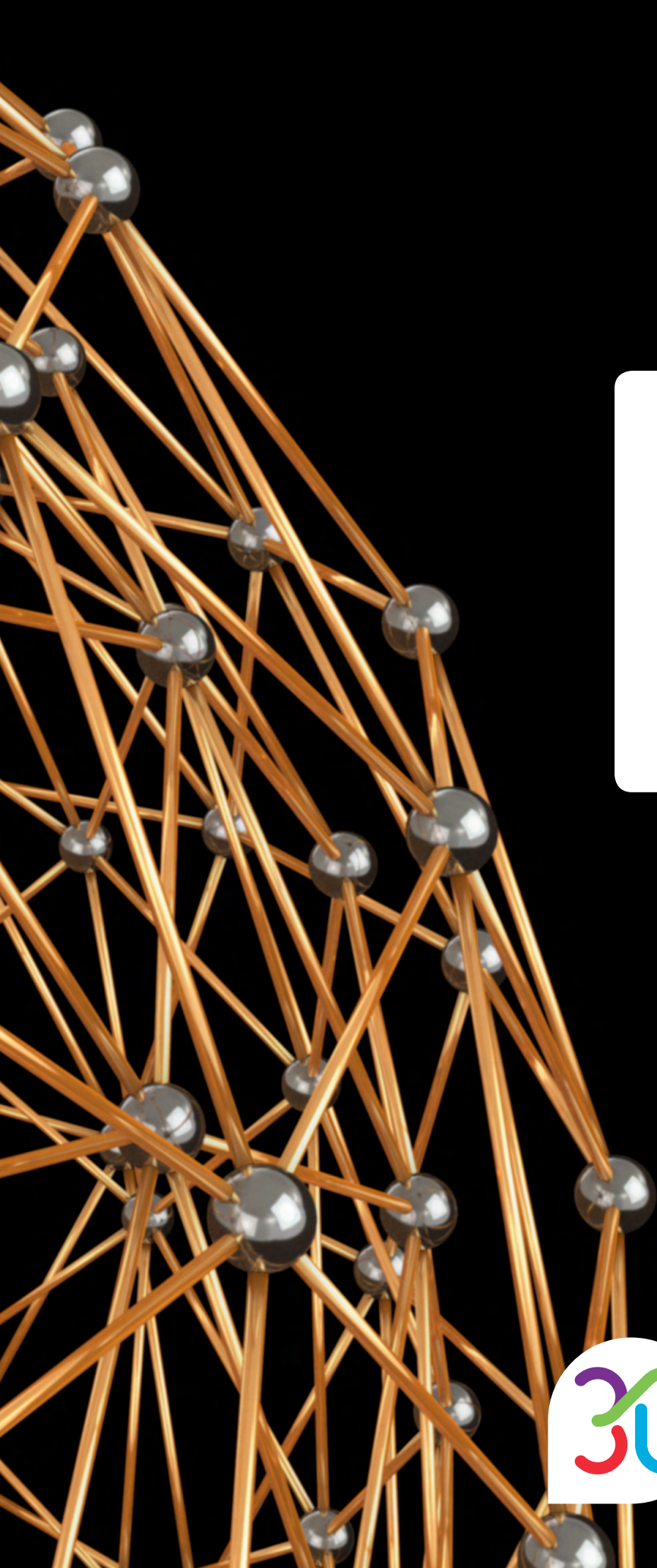
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30th Anniversary

This is the last edition of our 30th anniversary section. We focus on all kinds of technological developments from the past as well as current ones. What are these developments and how can they be a source of innovation? Furthermore, we put the spotlight on promising all European start-ups!

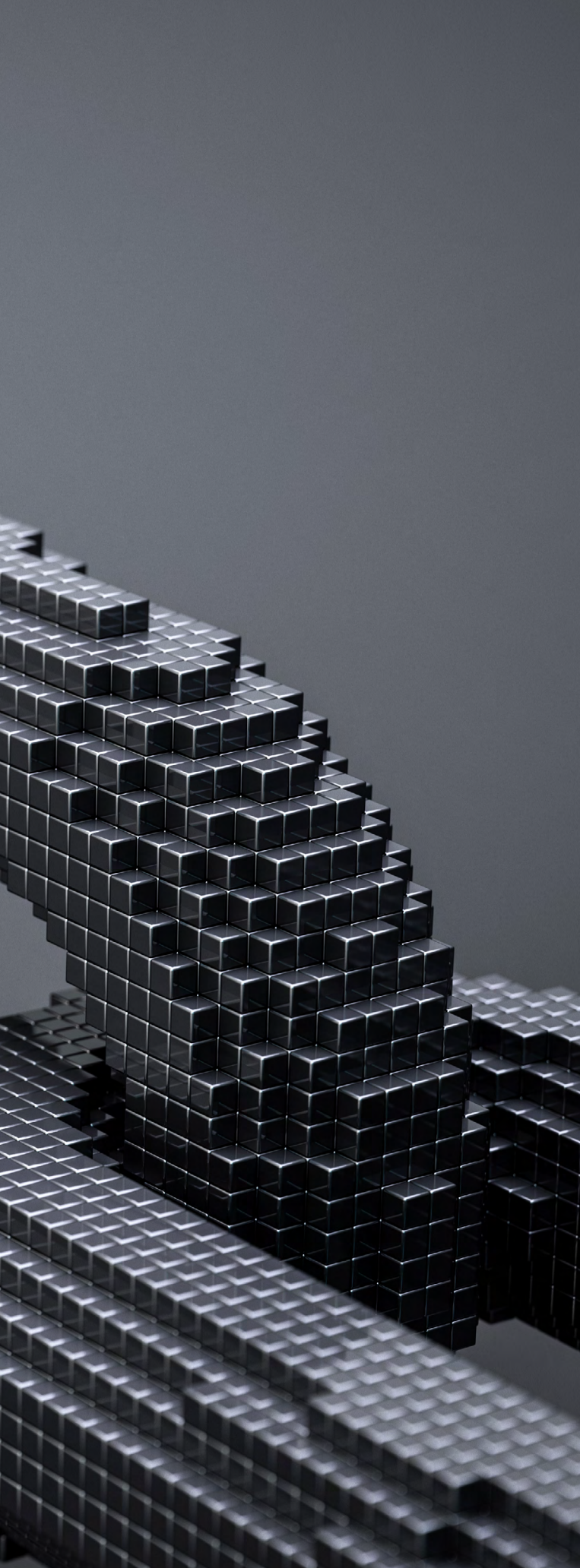


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Technological development as a source of innovation

What have been the major developments in the past few years, and which technology will mature? Are upcoming developments set to become drivers for future innovations?



All good things come to an end

2018 has been the year of our 30th anniversary. We have celebrated that fact with this special 30 years section. In each issue we have looked at important themes that have had an effect on our industry and will continue to do so in the years to come. We have also put the spotlight on companies that have been active in the sector during those 30 years.

This is the final edition of our anniversary year. So in this 30 years section we look at important technological developments. Technology that will mature in the coming years, as well as new developments that present other challenges and opportunities. For we can certainly say that technological developments drive innovation in our industry.

Trackers and tracers

Since the end of the 90s, all kinds of trackers and tracers have come onto the market and become part of everyday life, such as barcodes, QR codes and RFID (Radio Frequency Identification).

EDI and blockchain

EDI (Electronic Data Interchange) came out at the end of the 90s and is mainly used to share big data. Blockchain stores the data that is shared. Data such as bank statements, property deeds, contracts, or personal messages. It is stored in a distributed system rather than a central location and all transactions and updates are reflected in real time, so it is impossible to falsify data.

The system can be used for pet food too. It can give consumers insight into the origin of ingredients. They can then see whether claims about local sourcing and sustainability are true. Supermarkets already do so for products such as orange juice.

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Nano-sized chips in all kinds of products will be linked to sensors that measure movement, temperature, location, et cetera.

Nanotechnology

We first wrote about nanotechnology ten years ago. Nanotechnology allows you to study and manipulate material at the microscopic nanometre scale. It can be used to improve the quality, application and effectiveness of products in many different industries: food, textiles, computers/ICT, medicine and engineering.

An example of its use in the pet accessory sector is to make bedding water and dirt resistant. The application of nanotechnology seems limitless. Although not yet used in pet food, there are many possibilities with regard to product marking, longer-life packaging and healthcare.

Higg DDM

Application of the Higg Design and Development Module is a relatively new development. Higg DDM can be used during the accessory design stage to calculate the environmental impact of a product. The tool then enables the designer to replace chosen materials with more sustainable options.

This module provides the pet accessory industry with an opportunity as never before to meet sustainability requirements as well as the needs of today's consumer (see article in January 2018).

Internet of things

We have all heard of the internet of things (IoT). But until now its only application in our sector has been for track and trace products and some basic pet health monitoring.

In the next few years we are going to see a lot more of IoT. Nano-sized chips in all kinds of products will be linked to sensors that measure movement, temperature, location, et cetera. The sensors will also get smaller and smaller.

Smaller chips and smaller sensors use less energy. And energy can increasingly be generated and transferred from heat, solar cells, et cetera. That will enable a smart IoT application to function for a longer period. Mobile devices are now part of everyday life and will be used as hubs for IoT applications, giving the pet owner – and the pet industry – a huge amount of data.

Many smart bowls and feeders, treat dispensers and cameras have already been piloted, and more and more different kinds are being sold. This will be a learning curve for both the industry and the consumer, as these kinds of advanced applications are tried and tested.

Data is the new gold

These examples have one thing in common: data. For data is not only the key to the future of Google and Amazon, but also to that of the pet industry. So keep an eye on Nestlé, who are using all kinds of apps to collect data from pet owners and their pets on nutrition, exercise, et cetera. Data is set to become an important asset for product innovation and for predicting the behaviour of consumers and their pets. ♦



Corine van Winden
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globalpets.community



10 European pet start-ups to watch in 2018 and beyond

Innovation is crucial for the pet industry. So it is interesting to know something about start-ups that have recently entered the market. Let us have a look at some successful examples of new players on the pet market: ten start-ups that are taking on pet markets across Europe.

Butternut Box (UK)

Butternut, founded in 2016, is a very different kind of upmarket pet food company. Fresh dog food is made and delivered in boxes to homes across the UK. All the food is cooked to order in weekly batches and tailored to suit the needs of each individual dog. The company has made quality and freshness the brand's distinctive features: 'Putting the food back into dog food' is their motto. Over the past two years, they have raised funds worth €7.1 million (\$8.1 million).

Mascoteros (Spain)

Mascoteros was set up in 2016 and operates in Spain and Portugal. Its e-commerce pet products marketplace comprises 520 brands, 35,000 items and 300 pet shops in Spain.

The company's main strengths are its extensive product catalogue, competitive prices and delivery service. In just two years, it has raised funds worth €1.8 million (\$2.07 million).



PawSquad (UK)

Launched in 2015, this company’s mission is to improve the delivery of pet healthcare. Over the past few years, PawSquad has built a successful marketplace that connects pet owners to pet care providers (veterinarians, trainers, breeders, nutritionists) over multiple touch points.

The services provided include ‘Video Visits’, a 24/7 face-to-face video consultation service with certified vets. The company has raised €1.6 million (\$1.8 million).

Tailwise (UK)

Tailwise launched in 2017. Their ambition was to make the process of looking for and purchasing a dog much easier. Today, Tailwise is a platform that matches dog buyers with trusted and responsible dog breeders. The company also provides its users with guidance and assistance when looking for a dog, by vetting breeders, ensuring puppies are healthy and giving future owners a ‘No Puppy Farm’ guarantee. They raised funding worth €225,000 (\$258,000).

▶ SEE NEXT PAGE

Petbnb (The Netherlands)

Petbnb, founded in 2015, connects dog lovers with dog owners looking for a trusted sitter for their beloved pooch. The platform was inspired by Airbnb and allows its users to find dog day care, house sitters, dog walkers and many other services in areas of the Netherlands. The platform provides services in more than 700 towns around the country and has over 1,000 subscribed sitters.

Dog professionals who subscribe to the platform are promised help with growing their businesses: 24/7 support, tools and useful tips.

Oupet (Finland)

Oupet launched in 2015, offering pet sitting services. Oupet helps pet owners find trusted and qualified pet sitters in Finland whenever they need them. Among its services: boarding, house sitting, drop-in visits, day care, dog walking, and grooming for dogs, cats and other pets. They also offer their users the opportunity to become a pet sitter. All pet sitters are required to go through a verification process before they are approved. The company raised funds worth €50,000 (\$57,000).

Wooldog (Poland)

Wooldog started in 2017, mostly producing handcrafted sweaters and unconventional pet accessories such as wool blankets, jackets and scarves. Its e-shop and Instagram feed feature dogs clothed in wool items that are made individually by the Polish brand's artisans.

Dinbeat (Spain)

Dinbeat was set up in 2016. It developed a wearable device called DinbeatPRO which monitors a pet's health at veterinary facilities. It allows veterinarians to monitor vital organs, giving pets the best, real time, medical assistance. The device saves time and money for veterinarians, helping them to grow their business while improving the quality of a pet's life.

Snau (Spain)

Snau, founded in 2016, is the go-to website for a dog owner's everyday needs. The platform is a vetted marketplace for services such as dog sitting, walking, training and grooming. The young company also offers places for your pet to stay while you are on holiday. They raised funds worth €305,000 (\$350,000).

Felcana (UK)

Felcana was founded in 2016 as a company devoted to pet healthcare. They monitor the health and wellbeing of cats and dogs, using connected devices that track exercise, temperature, eating and drinking habits, and sleeping patterns. The data is collected and analysed in their cloud computing platform, which also produces reports and insights made available for veterinarian experts. They raised about €200,000 (\$230,000) from Innovate UK and from angel investments. ♦

Source: *EU-Startups.com*, *Mariaclaudia Carella*
bit.ly/2qc4dnJ

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Effeffe is the strong partner you can rely on for private label pet food.

The Ferrari idea

Back in 1986, Angelo Ferrari had a very good idea: for the company he had founded to focus on private labels and co-manufacturing. Effeffe has developed and produced dog and cat food ever since.

Effeffe has more than 80 employees working at its headquarters, new quality centre and main plant (annual capacity 70,000 tons) in Pieve Porto Morone, south of Milan. Its product portfolio consists of four distinct ranges – over 130 formulas in every pet food segment, from standard

to super premium. Each product has a high nutritional content and can be customised to specific needs: single-protein, functional, organic or grain-free.

With over 60% of the Italian private label market, Effeffe is a leading European player. The company has an international focus and operates in 17 countries: Albania, Croatia, Cyprus, Czech Republic, France, Georgia, Greece, Israel, Macedonia, Malta, Poland, Romania, Russia, Serbia, Slovakia, Slovenia and Turkey.

Quality, research, innovation and safety

Effeffe has constantly invested in quality and research to guarantee the safest and best possible pet food. Its new quality centre carefully selects ingredients and conducts over 200,000 checks on raw materials (95% of domestic origin) and production processes.

Strict supply chain control, traceability, an NIR system for real-time analysis, UNI EN ISO 9001 certification, and an HACCP system are just some of the company's strengths, as well as its long-time cooperation with the University of Bologna's Veterinary Department.

Ethical company

Shared values have always been at the heart of Effeffe – a love of pets and respect for their nutritional, physiological and ethical needs; attention to ingredient selection; focus on GMO-free and organic. ♦

Milestones

- 1986** Company founded
- 1986-1995** Focuses on private labels and co-manufacturing
- 1995** First pet food company in Italy to be awarded ISO 9000 certification for dog and cat food production
- 1996-2000** Establishes joint venture with specialised US group. First collaborations with large groups in specialised and grocery channels in Italy and abroad
- 2001-2009** Gains trust of major companies, consolidating its position as reputable manufacturer of private labels. Continues to expand production capacity and introduce new formulas
- 2009-2018** Becomes leader in private labels in Italy



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40 years of continuous improvement

How two generations of the Sert family have turned their passion into a prizewinning business.

A small start

At just 17, Ibrahim Sert started a small production line for aquarium accessories in the historic area of Istanbul where he was born and grew up. His passion for keeping fish had made this an obvious choice. He found one client and started to make aquarium suction cups for them. In the following twenty years, all kinds of bird and fish accessories were added to the product portfolio as the company invested in production facilities.

Going into distribution

Mr. Sert's wife joined the company at the beginning of the new millennium – the start of an entirely new chapter. Realising the rising demand for aquarium products in Turkey, TISERT became a distributor for the Turkish market for fish food, water treatments, motors, filters and chillers, working with famous global brands like Prodac, Hydor and Teco. The company moved to a new location, where it could continue to provide its services to customers all over Turkey.

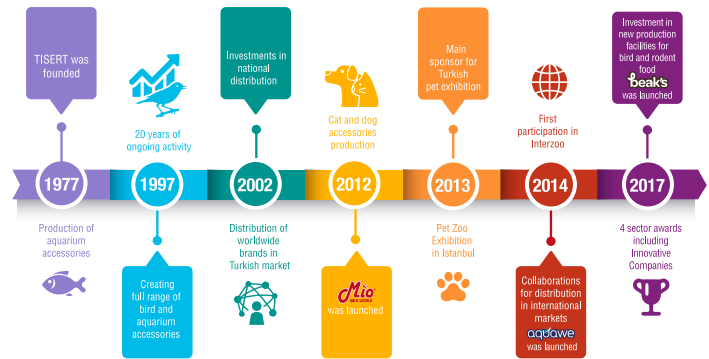
From generation to generation

The next generation of the Sert family joined the business, expanding it into the cat and dog sector. Its first new

brand, Mio, was launched in 2012. Others followed: Beak's for bird and rodent accessories and Aquawe for aquarium supplies and decoration. Investing in new technologies, TISERT improved the quality of its products and services. Its brand identity was further enhanced with a mobile app that made communication with b-to-b clients more efficient.

International positioning and expansion

From a tiny company with just one production line for suction cups, TISERT has continuously diversified and improved. In 2014 it began to expand the customer portfolio into markets abroad, now distributing its products in Europe, North Africa, the Middle East and the Far East.



Looking to a bright future

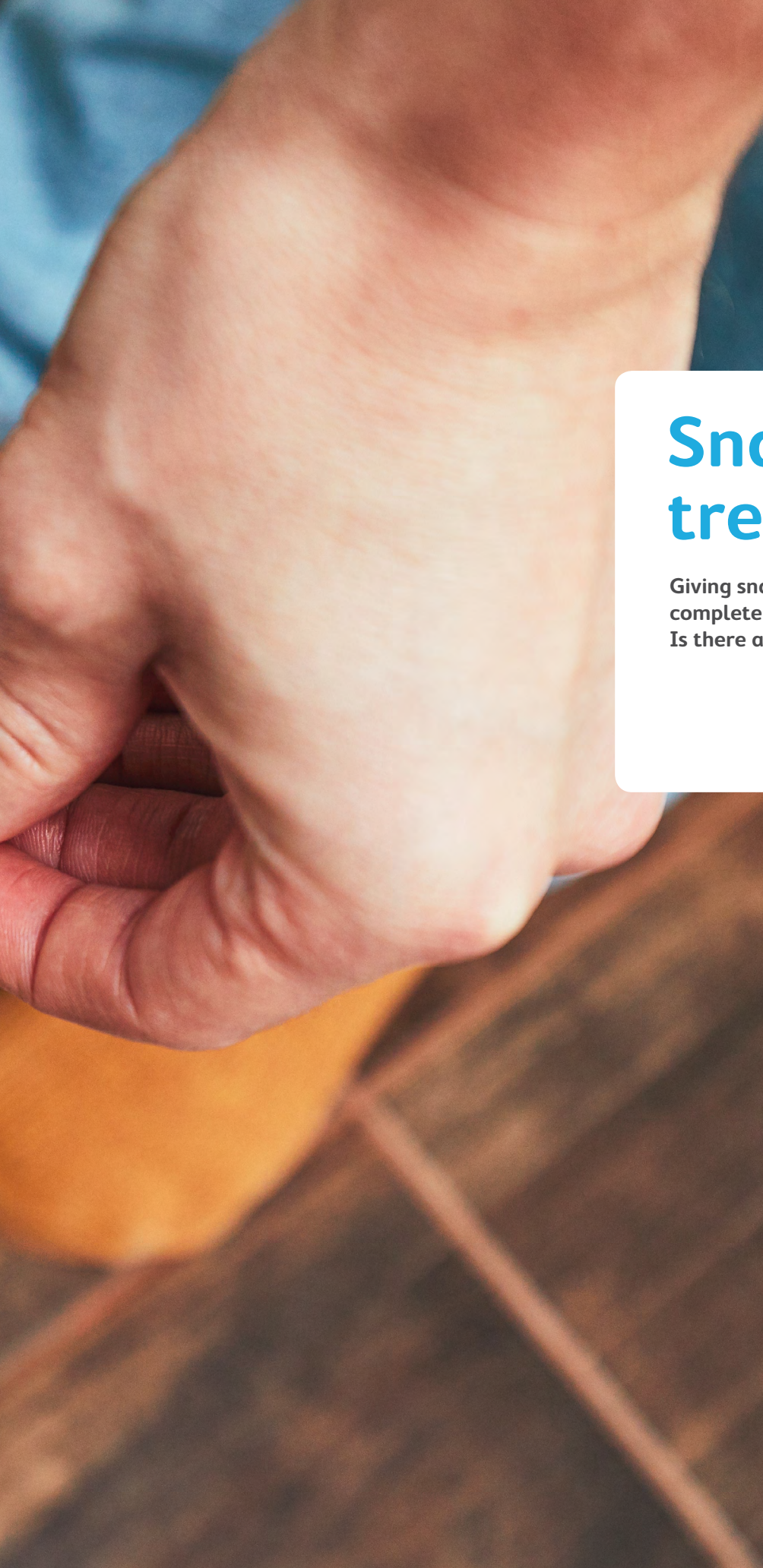
In 2017, TISERT won four awards – two Next Generation Young Executive awards and two company awards from the Turkish Pet Association.

Sales and Marketing Manager Selçuk Sert says: "Our consumer-centric approach to quality enables us to understand our customers' needs and expectations, and to satisfy those in the best possible way. We are ready to face the evolving challenges of the international pet industry." ♦





Wanpy[®]



Snacks and treats

Giving snacks and treats can upset a pet's complete and balanced food regime. Is there a solution?

Yantai China Pet Foods CHINA	26
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Shandong Luscious Pet Food CHINA	35

Ready for the future



Yantai China Pet Foods recently celebrated their 20th anniversary and opened a new head-quarters and plant complex. With that, they are ready for the future.

Cause for huge celebration

On 30 September 2018, Yantai China Pet Foods organised a huge celebration with partners from all over the world. There were three reasons for the party:

- It has been 20 years since Mr. Hao Zhongli founded the company.
- It has been one year since the company was listed on the Chinese stock exchange.
- The new head office complete with a new factory in Yantai was officially opened.

A global company

With eleven pet food manufacturing plants located in China, the US, Canada and New Zealand, Yantai China Pet Foods is a truly global company.

Their own brands include Wanpy, Dr. Hao, King Kitty, Zeal, Jerky Time and Great Jack's. They also produce for private labels, and act as an exclusive distributor in the Chinese market for brands such as 8in1, FURminator, Nature's Miracle Live, Sea Kingdom, Wafcol, Roam and Frisian. The company

works together with distributors and retailers all over the world, such as Amazon, TMALL, JD and Carrefour.

Focused on quality

Committed to bring the best pet food and snacks to pets everywhere, the company has, from the start, invested in their people, processes and product development to meet international standards.

The whole manufacturing process has been carefully designed and is



continuously updated, in compliance with ISO 22000, ISO 9001, HACCP Food Safety System, SGS North America Supplier Qualification Audit (SQA), BRC, BSCI, and MSC. The company is also registered with the FDA and EU to export pet food into Europe and the US and has passed governmental audits by DAFF, CFIA and MAFF.

Their mantra: 'Pets are our friends as well as our family.'

A bright future

The celebration on 30 September proved not only a great party, but also a fitting occasion to shine the spotlight on all the company's business partners, to

Historical milestones*

- 1998 Mr. Hao Zhongli founded the company
- 1998 First export to Japan
- 2003 First factory built
- 2005 Wet food factory
- 2007 Third factory built
- 2008 Fourth factory built
- 2009 Vice Chairman of CIQA (China Entry-Exit Inspection and Quarantine Association)
- 2010 National Quality Faithfulness Enterprises
- 2011 Vice Chairman of China Gift & Leisure Products Association
- 2012 Dry food factory built, joint venture with Vitakraft from Germany
- 2012 China High-Tech Industry Enterprises
- 2013 Wanpy brand was awarded as the 'China Famous Brand'
- 2014 Dental snack factory built
- 2015 No. 7 factory built in US
- 2016 Cat litter factory built
- 2017 Biscuit factory built
- 2017 Initiated an IPO and listed A-shares on Shenzhen Stock Exchange (SZSE)
- 2018 No. 10 factory built in Canada
- 2018 New head office and factory in Yantai
- 2018 Celebration of its 20th anniversary

* If a place is not specified, the factory is located in Yantai.

thank them for their contributions over the past 20 years and to invite them to continue working together in the future.

Yantai China Pet Foods is looking forward to a bright future, one in which they will use their new laboratory as well as their pilot facilities to improve existing

products and create new ones. A future of growth on all continents, of new partners and new products, enabling pets to live a healthy and happy life. ♦

♦ **Yantai China Pet Foods Co., Ltd.**
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Complete and balanced treats



Giving snacks and treats can upset a pet's complete and balanced food regime. What is the solution?

Everything your pet needs?

Complete and balanced. What does that really mean? For us in the pet industry, it says the food has everything your pet needs and the nutrients are balanced. Pet food regulations define the claim of 'complete and balanced' or '100% nutritious' as meeting critical nutrition levels.

What if a pet owner gave 10% more calories to their pet than provided in the complete and balanced food? For instance, my dog requires 1,000 kcal/day. What if I gave him 100 calories more each day? The answer is, it would mean 36,500 extra calories over one year which would either require me to exercise my dog more or let him become overweight.



Over-feeding

Facts show that many pet owners feed an extra 10%, 20%, even 30% or more calories each day by giving treats, food scraps, chews, dental products, pharma and nutritional supplements. Since exercise and activity typically do not increase, we observe that a high percentage of our pet populations are overweight (around 40-50%).

All of these 'extra' food products bring more than just calories. They bring protein, fat, fibres, macro- and micro-minerals. Feeding a treat high in phosphorus can easily reverse the overall ratio of calcium to phosphorus, for example. High sodium levels in treats and meat rewards can totally upset the absolute level of sodium designed into the complete food.

Pet owners commonly do not balance their own food intake as well as they should and, over time, nutritional and health issues begin to show, in

cardiovascular disease, hypertension, colitis, cancer, etc. The same is true for our pets, but the length of life of pets is much shorter and nutritional balance can have a much bigger impact to health and life.

How to ensure balance?

Without knowing how many treats might be fed to a pet, there is no way to fully predict what happens to the completeness and balance of the food when looking at the total food regime. That is in the hands of the pet owner.

If they were simply to feed less of the complete and balanced food when feeding treats and other edibles, that would help to keep the caloric intake in check. However, it is not an easy adjustment to figure out, and the completeness and the balance of the food would still be altered.

Questions to answer

So why not just make all treats complete and balanced? That is a reasonable question. In the past, many brands have formulated treats to be complete and balanced but later moved away from it. Cost is often an important consideration. Or why not include in our feeding instructions a word of caution on how to feed other edible products? Or suggest giving less food when using treats?

I believe it would be easier if all treats were complete and balanced. That does not resolve the possible concern of too many calories or potential unbalancing, but it would be a good start. ♦



Dr. George Collings
 gcollings@cnutritionalsolutions.com
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Luscious CHINA
Luscious pet snacks since 1998

Pet treats manufacturer since 1998 with 250,000 sqm.

Own labels: Luscious and OEM. All 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. Now the products are exported to the US, Europe, Korea, Hong Kong, Southeast Asia, etc.

Shandong Luscious Pet Food Co., Ltd
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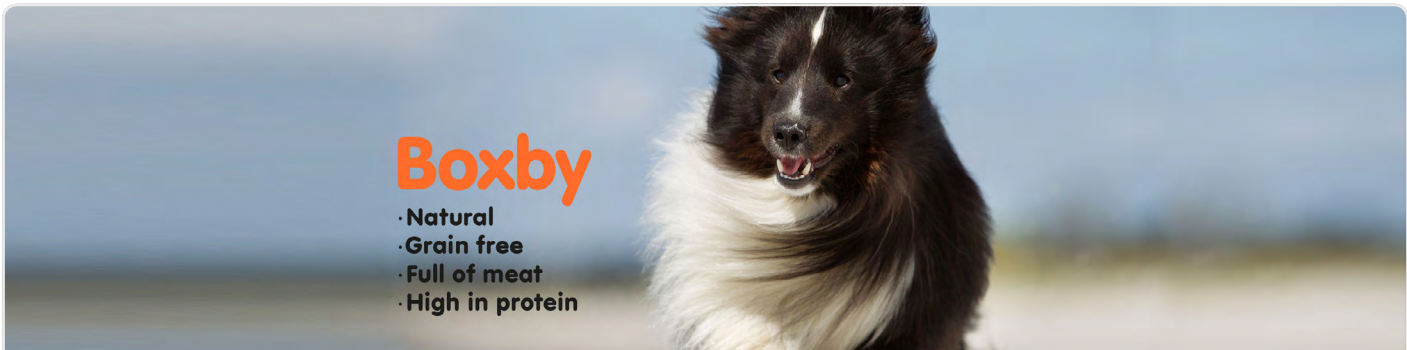
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Boxby THE NETHERLANDS
Boxby - All natural dog treats

When Boxby started with the now famous Boxby Chicken Wings 12 years ago, the company opened doors to new products and new businesses.

After 12 years of growth and success this led to the launch of a new packaging. As an all-natural dog treat brand Boxby stands for honesty, quality and protection.

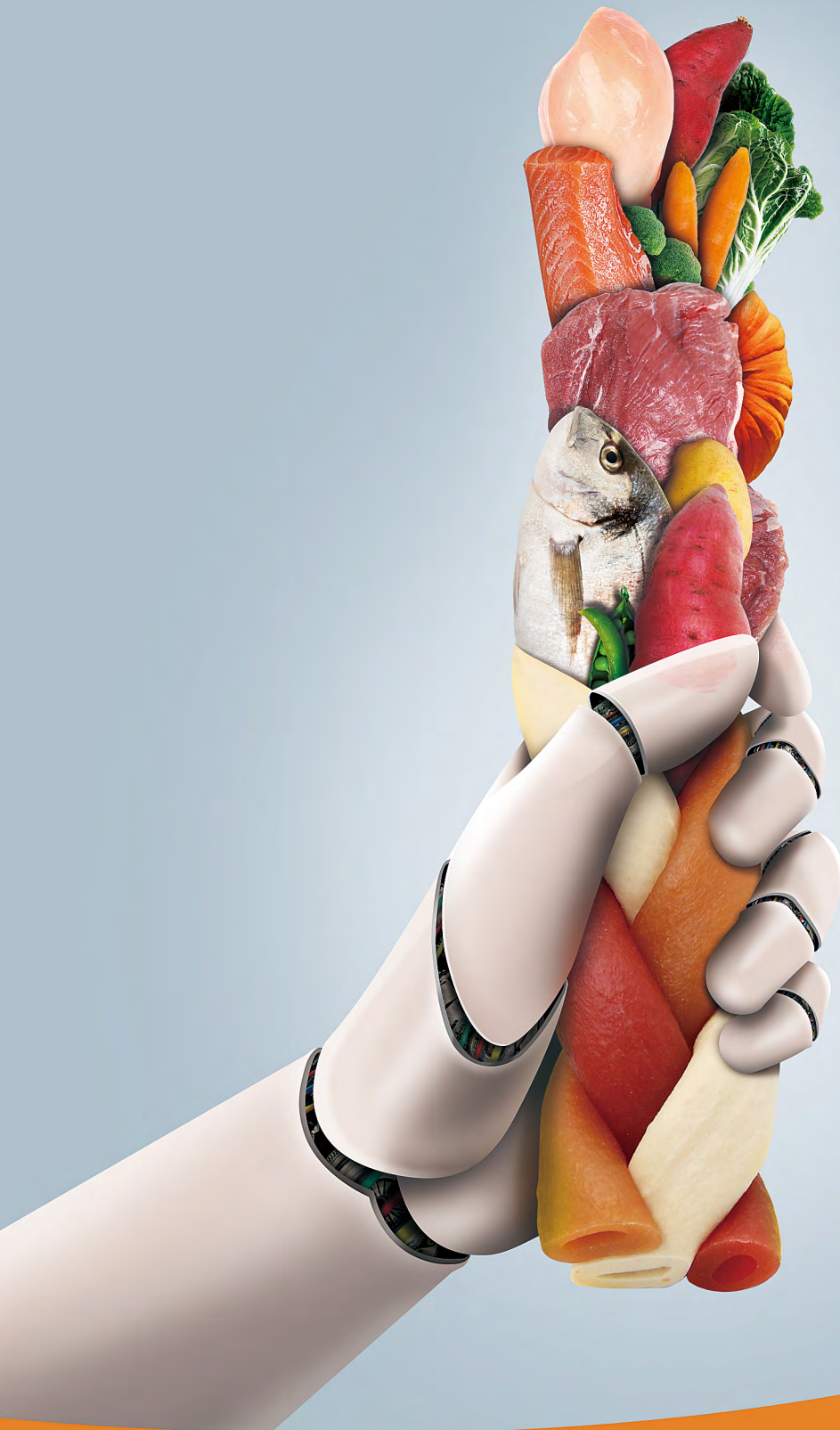
With clear communication on the USP's and a clear shield-shaped window on the packaging, the consumer knows exactly what they buy.

Combined with an expansion of the range by introducing a full range of Superfoods and Cold Pressed products, Boxby is again opening new doorways for a bright and innovative future on the pet specialty market.

Pet specialty is what Boxby focuses on, because they believe in selling premium products via educated and specialty channels.

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Guna ITALY

Natural and effective complementary feed for our pet friends

The Italian company Guna has developed a line of complementary feed in paste for dogs and cats.

35 Years of quality, technology and innovation

Founded in 1983, Guna has rapidly become the leading Italian company in the production and distribution of complementary medicine and health products of natural origin. Today, it has a staff of over 300 employees and distributes in over 30 countries all around the world. All Guna products are made in Italy in cutting-edge facilities.

Every year, considerable resources are invested in research and development. The company supports several medical and professional associations that provide intensive educational and training programmes to medical doctors, veterinarians and pharmacists. Its constant goal has been to propose controlled, safe and effective solutions

to achieve and maintain mental and physical wellness of humans and animals.

Especially for pets, the company has developed a new line of complementary feed in paste for dogs and cats, specifically designed to maintain and improve the wellness of our pet friends: the PETformula Line.

Special formulation

Thanks to this special formulation and the synergistic action of carefully selected ingredients, the PETformula Line helps to improve our pet friends' natural physiological condition. The specific formulation and synergic action of the various ingredients, carefully selected and in precise and balanced quantities, aid in facilitating animal well-being. The 50g tubes of paste makes

its administration easy: it can be mixed into the complete feed, put directly in the mouth or, for cats, spread on the paw so that they will ingest it automatically during the daily cleaning of the fur.

Natural, effective, GMO-free and tasty!

A lot of attention was paid also to the taste of the high-quality ingredients, palatable for both dogs and cats. PETformula flavours are so savory that they were used in gourmet recipes for pets by the Italian celebrity chef Ugo Gastaldi. ♦

♦ **Guna S.p.a.**
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Carry Pet Food POLAND Merry Christmas from Carry

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love, joy and peace.

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you a spark of good fortune
needed to achieve all your
endeavours successfully.

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*Merry Christmas
and
Happy New Year*



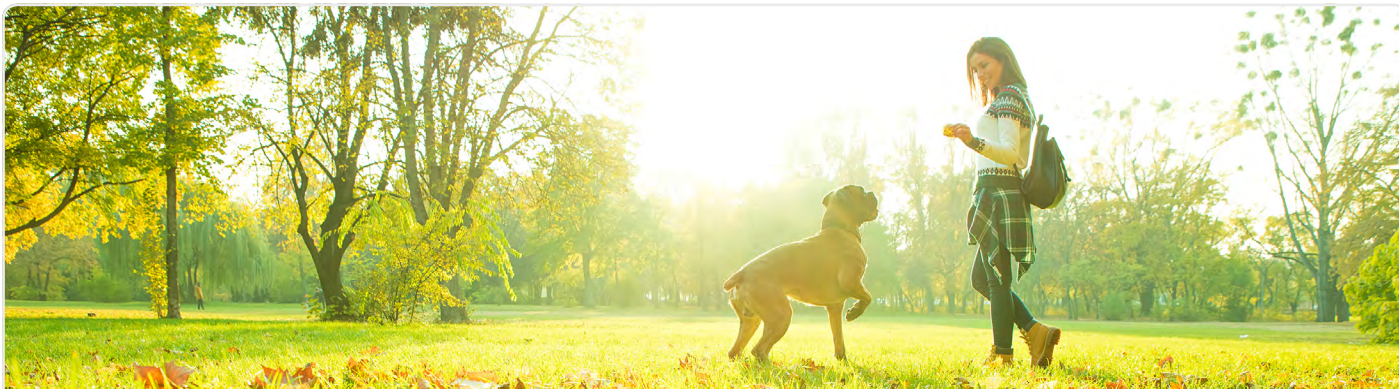
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PET INTEREST
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Scholtus Special Products THE NETHERLANDS Shelf position of dog treats

Studying consumer behaviour in buying treats for dogs and cats, it
strikes the experts at Scholtus that the majority of consumers looks
either for premium quality products or for a fun item to buy for their pet
at a relative low price.

Today the premium buyers want to have an extensive explanation on
the packaging about the product. For the impulse buyers, quality of a
treat is of less importance, as long as it is safe. They are attracted by the
product, the packaging and the price point. Scholtus advice to retailers
today is to build up one meter of shelf from top to bottom with premium

treats and fun treats to attract footfall and offer something
for all types of consumers. Focus on the different life stages of
pets as well and you will notice the sales increase yourself.

Scholtus Special Products B.V.
info@ssp-proline.com
scholtus.com

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 snacks 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 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





Latest trends in pet care

Pet wearables – a booming industry, set to grow even further as safety concerns fuel the adoption of tracking technologies. What other trends define the durables and pet care market? And how healthy is the humanisation trend for our pets?

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Durable pet product trends in the US



Which pet products are hot in the US? Here is a quick update on sales trends!

Dogs and cats as winners

Packaged Facts estimates that US retail sales of durable pet care products for dogs and cats totalled \$5.2 billion (€4.5 billion) in 2017, equating to roughly one-tenth of all pet product sales in the US.

Among the dog and cat durables categories, toys is the largest: accounting for 30% of sales in 2017, or nearly \$1.6 billion (€1.4 billion). In fact, toys are the most widely purchased pet durable: on a 12-month basis, 59% of dog owners and 48% of cat owners purchased toys for their pets. Only dog collars, harnesses and leashes score similarly high purchasing rates, with 45% of dog owners buying one every year.

Not surprisingly, collars, harnesses and leashes rank second in pet durable sales: at 20% of the overall

pet durables market, or just over \$1 billion (€0.86 billion) in sales. Next in the sales ranking are pet beds at 13% and carriers, crates and housing at 12%. The remaining three pet durables categories – bowls, waterers and feeders, apparel and fashion accessories, and litter boxes and accessories – each account for single-digit percentage shares of the overall pet durables market.

As in the overall pet market, dogs account for the bulk of pet durables sales: at 69% in 2017, compared with 31% for cats. Dog products lead across all categories – except for cat-exclusive litter boxes and accessories – with shares in sales ranging from 55% for pet bowls, feeders and waterers, to 95% of sales for pet apparel and fashion accessories.

Kennels, carriers and crates are among the most expensive pet durables, with an average price of \$70 (€60) per item. Product assortment – as well as prices – are being challenged by online sales, which now account for over 20% of retail sales in the pet durables market. This, despite the ready availability of pet products at a wide range of specialty and mass-market retail stores.

In the second tier of pet durable categories by price, are beds, litter boxes and collars, leashes and harnesses. For toys, prices vary widely but average in the single digits.

US Retail sales of durable pet products

Average prices per category, 2017 (USD / Euro)	
Category	Average Price/Item
Kennels/Carriers/Crates	\$70 / €60
Beds	\$30 / €26
Litter Boxes	\$27 / €23
Collars/Leashes/Harnesses	\$23 / €20
Apparel/Fashion Accessories	\$15 / €13
Bowls/Waterers/Feeders	\$12 / €10

Source: *Packaged Facts*

Factors driving sales growth

Factors driving sales growth through higher prices include:

- The trend towards pet humanisation as reflected in the ‘pet parenting’ hype that has reshaped the US pet industry over the last decade.
- Premiumisation caused by heightened concerns for pet health and wellbeing is moving pet owners to upgrade to specialty and premium-priced product offerings.
- Higher overall standards for pet product fashion and design, in keeping with consumers’ own taste for home decor and lifestyle accessories.

- Natural and eco-friendly product options are key to product premiumisation.
- Pet safety as reflected in high-tech pet carriers for travel and pet car travel accessories.
- Digital and online connected innovative products for pet monitoring and ensuring pet health and wellbeing.

Among these trends driving market growth, high-tech electronic or digital and Internet or wireless products may be the most closely watched. The latest Packaged Facts pet owner survey data from August 2018, shows that in the past twelve months 12% of dog owners purchased ‘products that tie in to the Internet or mobile apps, use Bluetooth, or otherwise transmit information’. Of these, 23% had purchased a pet camera system. Other leading product types in this emerging arena, include tech-based pet trackers (16% of high-tech product purchasers), smart microchip or automated pet doors (13%), toys for cognitive and emotional stimulation (also 13%), and smart pet feeders and treat dispensers.

For high-tech pet durables – as well as for pet durables and pet products generally – product premiumisation, the growing role of online sales and increasing awareness regarding pet health and wellbeing are driving market growth and the introduction of exciting product innovations. ♦



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 packagedfacts.com



Pet wearables – a booming industry set to grow even further

Safety concerns are fuelling the adoption of tracking technologies and sensors in the pet wearables market.

Tracking our lives and that of our pets

Technological innovations are transforming the way in which people go about their daily lives. The impact of technological advancements is not limited to humans alone – the way individuals care for their pets is also being influenced by the intervention of technology. Wearables, tracking various activities on a daily basis, are extremely beneficial for humans. But, in the case of pets, these could be transformational. Being able to receive data and information about their pets, helps owners to have a better understanding of their pets' health, wellbeing and whereabouts. They can even help pet owners to better train their furry companions for situations when they have to be home alone.

Innovations driving sales

With a wide range of pet wearables featuring innovative functionalities penetrating the landscape, worldwide sales of pet wearables are likely to record an impressive CAGR of over 7% between 2018 to 2028. This represents a business potential worth nearly \$3 billion (€2.59 billion). In addition, the pet wearables industry is characterised by research and development activities, which could translate into a massive influx of advanced products in the marketplace.

Not surprisingly, Mars Petcare, a leading player in the pet tracker business, announced a project named 'Pet Insight Project'. This is a three-year

"In case humans discover a product that works for them, they will also look for - or create - similar ones for their pets. That definitely seems to be the case with wearable technology devices."

Bob Vetere, President and CEO,
American Pet Products Association

study involving over 200,000 dogs across the US, with an objective of unleashing crucial links between pet activity, behaviour, and health. The project aims at leveraging technologies such as machine learning and data science to pave grounds for a new era of proactive pet care.

Monitoring pet health

The ease of collecting specific pet health metrics data is another key attribute of pet wearables that is fuelling interest in these products among veterinary professionals. The ongoing trend of healthier pet lives - focused on feeding and obesity control - has boosted the demand for activity monitoring wearables. With around 56% of dogs and 60% of cats clinically overweight (according to a recent clinical survey by the Association of Pet Obesity and Prevention) the demand for such wearables will continue to grow.

...and other things

In a bid to facilitate veterinarians in real-time decision making and offer them valuable information, leading pet wearables companies are now focusing on the development of devices integrated with cloud-based analytics. On the pet owner home front, manufacturers are looking to upgrade the quality of video cameras and treat dispensers to enable pet owners to interact with their pets through platforms such as Skype.

► SEE NEXT PAGE

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CAT PARK



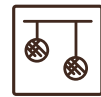
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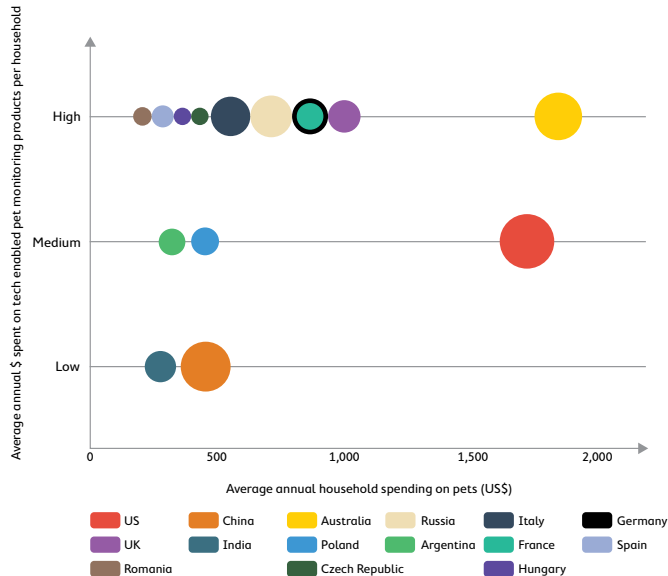
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Pet wearables market spend analysis



For instance, PetChatz® recently introduced PetChatz HD, a device allowing owners to FaceTime their pets, dispense treats and have two-way video chats.

Location tracking is a key feature that is becoming one of the preferred functionalities. Manufacturers are also integrating sensors into their products, thereby enabling pet owners to track activities of their pets via smartphones. Take Loc8tor: the company recently launched TabCat that incorporates a radio frequency receiver and audio and visual cues to find lost pet cats.

Last but not least, insurance and pet care companies are investing in the pet wearables market to offer collaborative services to pet owners. For instance, in 2017 multinational insurance company RSA invested in dog activity monitor company PitPatPet, to stimulate the use of smart devices in boosting the wellbeing of pets.

The impact of online

Simultaneously, buyer preference is undergoing a marked shift from modern trade and specialty stores to online retailers, where the choice of brands and products is unlimited. With favourable auto-replenishment programmes and minimum shipping costs, it is no surprise that customers looking for pet wearable devices are swiftly opting for online.

This shift in retail channel means that e-commerce sales of pet wearables is foreseen to exceed \$1 billion (€0,86 billion) in revenues by end 2028.

What about the future of wearables?

It is clear that the pet wearables industry has undergone a significant growth in the US, as pet owners take to sophisticated technologies. In fact, the region holds a stellar business potential for pet wearables brands. Outside of the US, the pet wearables industry can expect a continued growth in the Asia Pacific area, China and India where the rapid penetration of the IoT is paving the way for new business opportunities.

However, one issue that needs to be tackled is inferior battery technology. The inclusion of ever more features on one device, means that the limits associated with lithium-ion battery technology are quickly being reached. This has led manufacturers to opt for the less-efficient, lead-acid and silicon-carbide batteries. Additionally, the high cost of pet wearables is acting as impediment for mass adoption of these useful devices. It is expected that manufacturers who focus on producing relatively affordable products, that also feature customer requirement-specific functional attributes, are likely to witness promising future prospects in this industry. ♦



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Pet health and care – almost human?

Baby care and human beauty trends are defining purchase patterns of pet owners, especially where it regards dog and cat related goods and services.

Pets personal hygiene

Pet health and care is going above and beyond what has – up till now – been considered ‘normal’: a visit to the vet and regular grooming. As the humanisation of pets increases, suppliers are also adapting to the latest market trends.

Take a pet’s personal hygiene for instance. Skin and coat products have definitely reached a next level. Special oils with which to massage your dog? Not as bizarre as it may sound: the products

suggest that they can alleviate joint pain and arthritis. The bonus is that they are odour free. An interesting crossover is that such products are also marketed for human use. A good reason for retailers to stock and sell such products!

And then there is pet dental care. Fresh breath sprays and products claiming to have a ‘doggy dentist in a bottle’ fighting plaque and tartar, not only eliminate the often-unpleasant smell of dog breath aroma, they also do away with expensive and stressful visits



to the vet. The downside is that pet owners might omit going to a vet altogether, despite the fact that these products can fall short of what they promise.

Deodourising sprays that prevent bad odours, might sound the ideal purchase for pet owners. Especially if a dog or cat is kept indoors (as is the case in densely populated regions and inner cities). There is a snag though: such sprays can mask possible pet health issues. What is more, simply using a spray to mask their smell can be harmful for the pet. Because, in doing so, pet owners fail to take into consideration their pet's natural olfactory needs (their sense of smell is far more advanced than humans). It could cause pets to become extremely unhappy.

Walking the dog, or the dog owner?

Dogs are often taken on as pets to enable owners to exercise along with them. Going out for a walk is the traditional way for both owner and pet to keep those muscles in shape. But, humanisation is leaving its mark here also. For instance, Dog Yoga (or 'Doga') services are becoming increasingly popular. Together, owners and dogs take on various

yoga poses, sometimes matching each other and other times following a fixed routine. The promise offered by Doga is that it is great for human-dog bonding. This may be true, but critical voices warn that a dog has no choice but to follow its owner. In this context, the UK charity Dogs Trust points out that: 'It is important to remember that dogs cannot tell us when they have had enough.'

Kittengarten

We all know that pets require social contact from a very early age if they are to mingle with humans. Now that cats are a popular choice for millennials who are out to work during the day, kitten 'kindergarten' and Cat Café services are fast gaining ground. Basically, such cat playgrounds are full of feathery toys, treats, climbing and activity trees and – of course – humans willing to pet them. The idea is to provide a service that helps cats to socialise. However, as with dogs, it can be difficult to tell when a cat has had enough. It is important that cat wellbeing is always paramount.

Pet care – not always the same as pet wellbeing

Concluding, we can say that whatever the trend in pet care and wellbeing, it is important that we never forget their natural wellbeing. Pets are not humans and we must be careful not to expect that pets enjoy the same things we humans do. Every animal has the right to live according to their own species-specific behaviour. The wants and needs of pet owners or the economic interests of the pet industry should never be placed above those of our pets. ♦



Karen Wild

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The changing face of pet retail

The GlobalPETS Forum is seen as the most important network event in the industry, where top managers meet.

Why attend?

- ◆ Meet and maintain contacts with the leading decision makers in the industry worldwide
- ◆ THE place where deals are closed
- ◆ Facilitated networking opportunities as part of the programme
- ◆ Insights into current and future developments in the industry that help you stay ahead of the competition

Wednesday afternoon

Tour

GET TO KNOW THE DUTCH MARKET

There are two activities you can join:

1. The free pet retail tour, to visit some interesting shops;
2. In the evening an informal get-together, dinner included, to start networking right away.

Avonturia - De Vogelkelder

Avonturia in The Hague is not only the biggest pet store in the Benelux, it is also a complete experience centre! With 6,000 sqm of shopping experience, adventures for kids, education, workshops, food outlets, and more. Open 7 days a week - discover, experience and admire the world of Avonturia.

Garden Centre de Bosrand

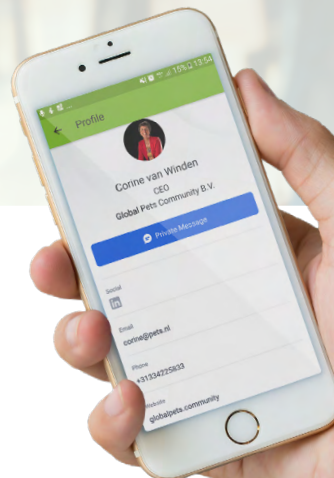
This family-owned chain of four amazing garden centres combines gardening, indoor planting, lifestyle products and pets into one inspiring shopping experience. We will visit de Bosrand in Alphen aan den Rijn, a vast shopping experience of 17,000 sqm!

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This year's theme

The changing shopping behaviour of maturing millennials will create a new retail situation in the pet industry from 2020 onwards. The consumer is in the driver's seat and increasingly experience-focused. What are the implications for retailers, e-tailers, supply chain, marketing, and other parts of the industry?

Thursday 24 & Friday 25 January

Speakers

For this 20th edition, we have put together an impressive line-up of professional and inspiring speakers from inside and outside the industry. To mention just a few:



Torsten Toeller
Founder and proprietor
of Fressnapf Group
Visions of pet retail in a
digital world.



Yi Liu (Louis) Yige
Head of Pet Category
Alibaba/TMall
Digital pet care in China, today's
consumer trends, etc. What is
the impact on pet retail? How to
become a supplier?

Get answers to key questions

- ◆ Where will the online pets market be by 2020?
- ◆ How will online players disrupt the existing pet industry and how can you prepare?
- ◆ Who are millennial consumers and what does it take to adjust your products and services for them?
- ◆ How can you adapt your marketing communications to engage these consumers?
- ◆ How do you cope with both retailers and e-tailers?
- ◆ What do changing distribution patterns in the online world mean for you?



Om Marwah
Walmart's first Head of
Behavioural Science
How behavioural science principles
can be used to change consumer
(shopping) behaviour in order to build
loyalty, product innovation, etc.

Social evening

Thursday evening is the well known Social evening, the place to network and to join in a relaxed atmosphere.

Join us for the 20th GlobalPETS Forum!
globalpets.community/globalpets-forum-europe-2019-welcome



Pets - Becoming more human than ever before

As pet owners are lavishing more money and care on their pets than ever before, the demand for pet food products and services is becoming increasingly 'human'.

It is not just dogs

Over the past 50 years, the number of newly-born infants has declined by some 50%, while, at the same time, pet ownership has increased dramatically. With less children, pet parents have more money to spend on their pets. And although a dog might well be a man's best friend, it is not just dogs that are

receiving added attention from their pet parents. Besides dogs, ownership of both exotic and less exotic pets is on the rise.

What is the case? Millennials (the current 18 to 34-year-old age group) are coming of age and showing a strong attachment to the idea of pet

ownership. In fact, 69% of millennials agree with the statement that ‘having a pet is a good way to get ready to have a family’.

Children replaced by pets

But, it was the baby boomers (born between 1946 and 1964) who were the first generation to take pets in to their homes and create the pet humanisation effect. A decade ago, just 34% of adults in the 70+ age group owned pets. Now, as the oldest cohort of boomers begin to turn 70, this percentage has jumped to around 40%... and rising. Children leaving the home are being replaced by pets. Their owners are lavishing their sizeable disposable income on innovative toys, healthier food and treats, to grooming and activities.

In the US, pet parents continue to increase spend on pets with each passing year, by at least \$2 billion (€1.7 billion). The APPA estimates that Americans spent \$69.5 billion (€60 billion) on their pets in 2017, up from \$66.75 billion (€57.63 billion) in 2016. Back in 2007, they spent just \$41.2 billion (€35.5 billion).

In addition, demographic shifts towards smaller households also make some pet parents want to plug the familial gap with a pet companion. Rising incomes mean more money to indulge their ‘companion animals’.

What do pet products and services stand to gain?

Established pet care categories such as food and treats are pushing relentlessly upmarket as pet owners grow ever more discerning and as previous outlier trends become mainstream.

For example, ‘free from’ items are becoming more sought after. In dog food, Americans are

seeking foods that don’t include GMOs (genetically modified organisms) or ingredients such as: corn, fillers, artificial colours or preservatives.

Similar to the growth for medicinal ingredients in human food and beverages, sales of pet products that boast additional health benefits are also on the rise. As consumer awareness increases, they read labels and become more engaged in functional ingredients. Probiotics are also booming in pet foods, with a 139% sales growth within one year for dog food. Now, with 16% of US households purchasing dog foods with pre/probiotic ingredients, it is no longer a niche market.

Cat counselling and pet weddings

In addition to pet food, owners are spending on a range of products and services, from veterinary services and healthcare products, to grooming, training, accessories and insurance. It is one of the reasons why diseases – common amongst pets 40 years ago – have all but disappeared. Pets now suffer from conditions resulting from old age. Unsurprisingly, 20–25% of British pet owners have animal health insurance.

Because millennials and younger generations know no better than relating to their pets as part of the family, humanisation will continue to increase. For industry, there are significant opportunities to commercialise this trend further into a vast range of goods and services: from dog beer to cat counselling, from pet weddings to social pet work. ♦



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Innovation and production – food formulation

The explosion of new pet food products on the market makes it harder than ever to stand out from the crowd. What is the secret formula for success?

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Formula for success



The explosion of new pet food products on the market makes it harder than ever to stand out from the crowd. What is the secret?

Formulating to stand out

In recent years, we have witnessed an explosion of new pet food products in the market.

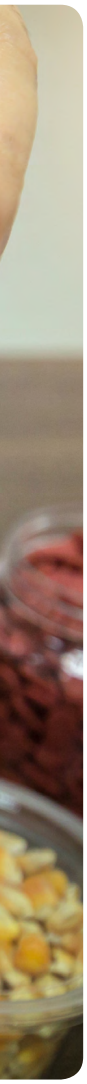
When we look at the label and composition, many of these products look the same, with the same claims and marketing tricks.

Faced with this reality, many producers are using riskier tactics to stand out from the crowd, like using novel ingredients, untested in pet food but claiming effects taken from human research. For differentiation, we are shifting the

borders of nutritional optimums, ignoring the fact that young, adult and senior animals have different nutritional needs and requirements.

What is the solution?

For a start, we need to try to improve the quality of the ingredients in the formulations. Then we should explain why it is important to use certain components that marketing departments often hate to talk about, and clearly explain their benefits both for marketing and the pet food buying consumer.



Know your ingredients and suppliers

Formulations are not a complex topic. Anyone with a nutritional background can compose a formulation that will satisfy the FEDIAF nutritional guidelines. But is this simplistic approach adequate for today's pet food market?

The answer is, of course, no. Beyond theory, ingredients 'know how' is essential. Ingredients each have their own nutrient profile, origin, functionality and diverse sources – including organic, animal, vegetable or, inorganic sources – and therefore will perform differently. Sometimes ingredients with the same name and classification will be processed differently. A strong supplier relationship is critical to understand how manufacturing processes can greatly influence ingredient performance by changing their nutrient profile, format and functionality.

Responsible producers best know their ingredients and are willing to share many years of developmental and manufacturing experience to help petfood producers understand functionality. To identify responsible suppliers/producers, it is important to question both their products and processes. The most genuine ones will be able to answer questions or work in partnership to find a solution.

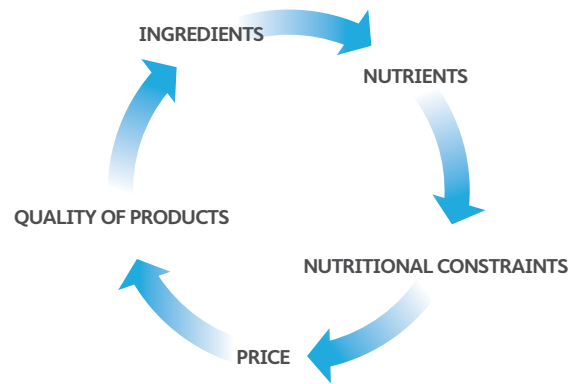
Optimise nutrients

It is also essential to optimise nutrients and nutritional constraints. Ingredients comprise nutrients used in formulations to ensure optimum balance and nutritional adequacy for dogs and cats throughout their life stages, from kitten/puppy, to adult and senior. Ingredient digestibility and nutrient bioavailability are also important parameters.

Resist price pressure

Weighing on all these decisions is cost and that inevitably means quality. The highest cost in

Optimising formulations



the production of pet food is the cost of the formulations, especially ingredient cost. There is therefore often great pressure on raw material costs as a means of reducing cost of goods sold and optimising profitability. There is a temptation for producers to go for the easiest solution, and – instead of entering price negotiations with reputable suppliers – turning to a lower cost supplier without considering the consequences.

Ingredient price will unfortunately often have a significant negative effect on finished product quality: physical quality, microbiological and toxicological quality, and/or biological quality. Poor quality kibbles often impact palatability and food intake. Microbiological and toxicological quality can greatly impact health of our pets. Biological quality affects digestibility and nutritional content and will reflect on pet's health and wellbeing.

Remember the customer

In conclusion, to succeed in a crowded market place and differentiate your product to stand out from the crowd, remember that your final customers are pets not the pet parents. Make sure that you provide them with a well-balanced complete formula, using high quality, safe ingredients. ♦



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Antioxidants: turning to natural solutions

Synthetic antioxidants are widely used to protect pet food ingredients. However, the demand for natural antioxidants has increased tremendously over the past decade.

The quest for clean labels

Today, pet owners are becoming more and more engaged when shopping for pet products. Increasingly concerned by the quality of the food they buy for their four-legged family members, they are now taking a closer look at the labels of pet food products. They expect pet food brands to use ‘clean’ ingredients that will preserve the food and health of their beloved animal.

Pet food manufacturers thus try to eliminate all additives and ingredients that have a chemical sounding name, and will be seen as being artificial to the consumer. Antioxidants are no exception.

What is oxidation?

Fats and oils are essential constituents of dry pet foods. They contribute to the flavour, nutritional value, texture and palatability of the pet food product. However, fats and oils are highly sensitive to oxidation processes. Lipid oxidation is a complex process that cannot be stopped or reversed. It can only be slowed down with the help of antioxidants.

When oxidation occurs, fatty acids react with free radicals, and ‘off’ flavours and odours are created. Oxidation also alters the structure of essential fatty acids and vitamins in a way that makes them less nutritional to the pet.

Moreover, the source of unpleasant odours caused by rancidity will be perceived by pet owners as a sign of poor quality, or harmful for their animals’ health.

Therefore, controlling oxidation from raw materials to the final pet food is crucial to ensure the quality of pet food.

Why use antioxidants?

Oxidation can be caused by many external and internal factors. Heat, light, oxygen, humidity or pro-oxidants can cause oxidation. Oxidation happens at almost every step of the pet food production. Once this oxidation mechanism has started, there is no way to stop it. It can only be slowed down.

To delay oxidative reactions, antioxidants should be added as early as possible to raw materials, and then regularly all along the kibble manufacturing process.

Antioxidants are vital to ensure the preservation of the organoleptic and nutritional properties of the product during its shelf life.

Freshness, naturally

Today, the most common antioxidants used in pet food are BHA, BHT and propylgallate, all of them being synthetic.

Yet natural solutions are available in the market. Indeed, various molecules from plants are currently under investigation for their potential antioxidant properties.

Researchers at Videka have confirmed the efficacy of several natural extracts in various pet food applications. Moreover, they have found that their ability to delay oxidation is even higher when they are combined.

Besides their efficiency to protect pet food from oxidation, new natural solutions must combine all the properties of the synthetic solutions to successfully replace them. Pets do not compromise when it comes to the taste and smell of their food. It is thus legitimate to wonder if going from synthetic antioxidants, which are generally odourless, to natural antioxidants, which may have more marked smells, affects pet food palatability.

Here too, Videka has demonstrated with cats and dogs that the palatability of diets containing its natural solutions is equal to that of diets containing classical synthetic antioxidants.

Plant based antioxidants are an excellent solution to naturally preserve both a pet food’s quality and the pet’s tasting experience. Using the synergy of natural extracts to improve oxidative stability of pet food is the future of shelf life solutions. ♦



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Managing moisture for better margins



Petfood manufacturers can improve their recipe design and at the same time reduce their costs by integrating fluctuating moisture content during formulation.

Trial equals error

It is a common question among petfood manufacturers: how do I produce nourishing petfood that ensures a healthy life for pets, while keeping my production process as efficient and cost-effective as possible?

The answer lies in analysing every step of the production process and checking whether improvements can be made to increase profit without reducing quality. Many manufacturers, however, fail to improve in one crucial step: the drying process.

When it comes to cutting costs, petfood producers look at their direct expenses such as maintenance and energy. More technical procedures, like drying, are often overlooked. The trial and error method rules this step, causing manufacturers to lose time and waste resources.

Being able to foresee these effects could help manufacturers not only in dosing individual ingredients more accurately but also enable them to work with fresh ingredients like fresh meat. While petfood is being more humanised, adding these fresh products will lead to a competitive advantage on the petfood market.

How formulation software helps

The great news is that there are ways to calculate accurately the effects caused by drying. Besides focusing on new production methods or machinery innovation, manufacturers should also be able to rely on their formulation software.

Formulation software, such as Adifo's BESTMIX software, should offer a multi-level product design. This means that the product developer can design the final product as well as several, separately produced, sub-products, all at once.

Managing your complete recipe design from the earliest stages onwards allows you to optimise the composition of every sub-product in such a way that the nutritional requirements of the final product are fulfilled at the lowest cost. Look for software that allows you to process sub-recipes on their own, while also taking specific parameters into account such as evaporation on the level of sub-recipes or individual ingredients. This method guarantees manufacturers that their raw materials are accurately dosed and form a finished product that is compliant and manufactured in the most cost-effective way.

Full control

While the drying process used to be a stumbling block, modern petfood formulation software should provide a solution. By calculating the effects that are caused by drying on each of the individual sub-recipes, manufacturers can eradicate several uncertainties from the start and optimise an entire recipe. Erasing the unpredictability from your production process allows you not only to be in full control of your expenses but also to accurately produce the nutritional quality that is mentioned on the label.

Adifo's BESTMIX formulation software is an all-encompassing solution, giving you full control and an overview of the entire petfood production process. The software assists in testing raw materials, breaking down the master recipe into sub-recipes for full recipe management and even creating compliant labels. BESTMIX offers a complete tool that helps you in creating competitive and compliant petfood. ♦



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KSE Process Technology THE NETHERLANDS

Is your factory up to the task?

How demand for greater flexibility in pet food formulation requires us to improve our production process.

Growing complexity

How do you cope with the countless changes in formulation driven by market demands, FDA regulations and marketing gurus? This ever-changing landscape of powders, meat inclusions and spices to feed our beloved four-footed friends? When talking about pet food formulation, we often focus on nutrition and optimisation. But what about the factories that manufacture these foods? Are they even up to the task?

Sadly, the answer is often no. While the possibilities and demands have

increased dramatically over the last decade, our factories are lagging behind. Recipes are complicated, and many ingredients must be added by hand, resulting in hard labour in dusty areas. To guarantee quality is always up to the highest standard, everything must be track and traceable, so we can know exactly where the food is produced, what went into it and when.

In short, our factories have changed from making a simple set of diets in long runs to a high complexity of formulations and processes in shorter

runs, resulting in a battle between our needs and production capabilities.

How to cope?

However, there is light at the end of the tunnel. As a specialist in dosing and weighing technology for pet food, KSE has a unique perspective on this dynamic and changing landscape and first-hand experience with developing solutions to cope with the challenges.

The company offers a robust portfolio of dosing and weighing technology, including its unique dosing slide,

weigher-in-weigher systems, containerised systems and automation, together with a specialty blend of knowledge for the pet food, premix and feed industry, built on over 80 years of experience.

The company is one of a handful of pioneering premium suppliers that have invested in new technology, building production facilities all over the world with a higher level of sanitation, track and traceability, accuracy and transparency, which it refers to as the ‘Factory of the Future’.

Make it future-proof

Future-proof designs are here to enable the greater flexibility that is expected of a modern-day factory. For example, a dosing slide has major advantages over its well-known competitor: the dosing screw. With a much higher accuracy, higher dosing speed and larger dosing range it can easily outperform traditional systems. Furthermore, the movement of the dosing slide activates the product and reduces bridging and rat-holing.

The use of gravity, in turn, reduces power consumption, making it a greener solution and, combined with driving weighers, it achieves higher flexibility. Unique weigher-in-weigher solutions provide single gram accuracies, making it possible to dose grams up to hundreds of kilograms using the same systems.

Another major trend is containerised systems to use as a silo or to move product around the entire factory.



This eliminates contamination during transport or when exchanging ingredients and provides the ability to have multi-type products for multiple species in the same lines. All this, combined with high-end technology for data analysis and optimisation, enables you to process pet food like never before.

Up to the task

Look at your own process and ask yourself this: ‘Am I able to produce

everything nutritionists think up in their lab, accurately and traceably without contamination?’ If the answer is no, you know you will have to act.

Getting your factory up to this task is not just a need, but mandatory to help your brand survive. The future truly is now. ♦

♦ **KSE Process Technology B.V.**
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Complementary feed for veterinarians and premixes



Research and development as basis for innovative complementary feed for pets.

R&D – key to success

With over 30 years of experience in contract manufacturing of complementary feed for pets, horses and poultry exclusively for private label, the Italian company Andreotti Farmaceutica provides fully customised solutions. In a highly competitive market, innovative research and development make the cutting-edge difference. The ongoing search for new, differentiating raw materials and the development of dedicated formulas that ensure animal well-being have been key to the company's success.

Going above and beyond

The company focuses on developing new ideas ahead of market trends. With a flexible approach to the market, in which customers can choose between optimised products or their own specific product requirements, a dedicated team of experts creates made-to-measure formulas exclusively for each customer. Extensive know-how in using

plant extracts as active ingredients have enabled the development of veterinary phytotherapy-based formulas. All formulas are not only customer specific, but also in compliance with European legislation.

Certified quality

At Andreotti Farmaceutica, the production processes are carried out according to the company's stringent procedures. In order to ensure the traceability of all raw materials, production is done in compliance with a strict internal control system. Additionally, all of the production processes are certified ISO 9001:2015 since 2002.

The company's production site can be found in Guarda Veneta, close to Rovigo in Italy. Besides having a large warehouse for raw material and finished product storage, the site is equipped with production and packaging lines for liquid, semi-liquid and solid products.

Full service partnership

Andreotti Farmaceutica designs, develops, manufactures and packages a wide range of complementary feed in accordance with customer requirements in several forms:

- Liquid forms - solutions, emulsions and oral suspensions
- Semi-solid forms - hydrophile and lipophile pastes in syringes and aluminium or plastic tubes
- Solid forms - powders and tablets

The company primarily serves the European market, where it offers a full range of after sales services. Customer experiences are shared to further improve formulas where possible. Other customers are to be found in North Africa and the Middle East. ♦

♦ **Andreotti Farmaceutica S.r.l.**
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Marketing

Profits in the pet health industry are suffering due to patent expiry, buying groups and increased competitive pressure. Pet companies can drive profits by tackling pricing – in five steps.

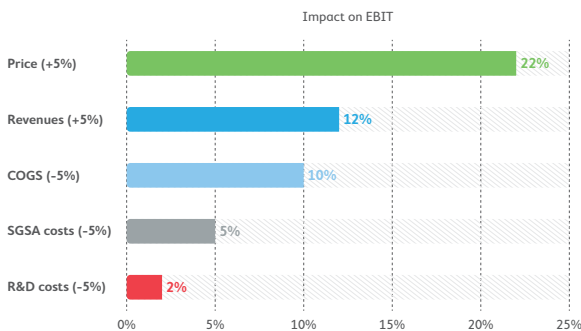
Driving profits in the pet health industry with value-based pricing

Profits in the pet health industry are suffering due to patent expiry, buying groups and increased competitive pressure. Creating, communicating and capturing value through pricing improves profits and customer satisfaction.

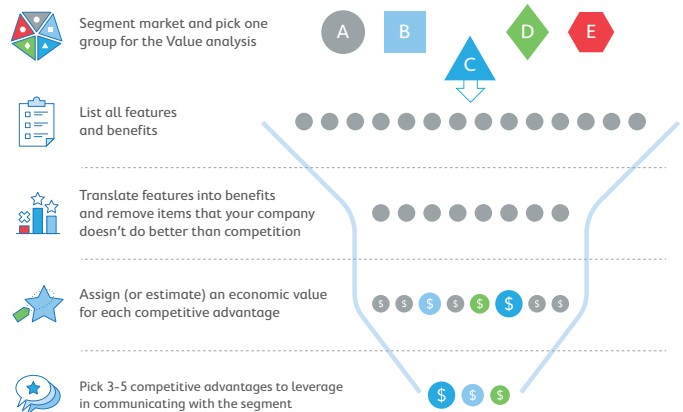
Pricing is the key profit driver

Pricing is the lever with the highest impact on profitability. Research done on a sample of Fortune 500 companies shows that a 5% increase in price improves EBIT by 22%, while increasing sales or decreasing cost of goods sold by 5% only improves profitability by 12% and 10% respectively (Hinterhuber, 2004).

Pet health companies can drive profits by tackling pricing. More specifically, pricing based on customer value ensures that company and customer interests are aligned.



The impact of pricing on profitability (EBIT)



Five steps to jump-start a company's value-based pricing

The value-based pricing approach

Step 1: Segment markets intelligently
Segmentation is tricky, but understanding customers lies at the heart of value-based pricing. Segmentation should go beyond technical or demographic criteria: the best segmentation approach is a needs-based segmentation.

Business case – dog food company (Germany)

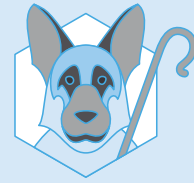
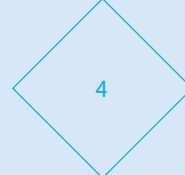
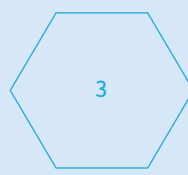
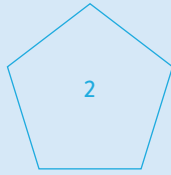
The following two segments were identified for the German market:



**Metropolitan
in-house pet lovers**

'Metropolitan in-house pet lovers' and 'Practical shepherds' – the former is made up of true dog lovers who spend significant amounts of money on their pets; the latter are professionals who like their dogs but also see them as business resources.

In the light of this segmentation, the company changed the way it presented, packaged and priced the product. 'Metropolitan in-house pet lovers' were very interested in food quality controls, while 'Practical shepherds' were keen



**Practical
shepherds**

on nutritional facts to ensure that their dogs have enough energy for the tough job of herding sheep, while minimising visits to veterinary clinics. Using this segmented approach to understand the needs of different kinds of pet owners allowed the company to introduce new products and to increase the prices of currently underpriced products. It also helped them to avoid getting into price wars, as price becomes less of an issue if customers feel that products really meet their ultimate goals and needs.

The segmentation process may require dozens of one-on-one customer interviews, focus group interviews and a conjoint analysis, but it pays big dividends: it allows a company to offer a series of differentiated products to different segments of customers at different price points.



Step 2: List features and benefits in main market segments

This task requires a brainstorming session among marketing, sales and product managers. For a pharmaceutical company relevant features are waiting times, efficacy, safety, compatibility, ease of use, relationships with veterinarians and opinion leaders, and so on.



Step 3: Identify competitive advantages in main market segments

A company needs to identify features and benefits that outperform the competing offer, while removing the rest. Being as good as a competitor is not an incentive for customers to choose your product.

Features must also be translated into benefits. It is the company's duty to do so: customers cannot be expected to undertake the exercise themselves.

Competitive advantages are the building blocks, the foundation, of value-based pricing. This pricing approach is essentially all about quantifying the key differences between competitors in economic, customer-specific value.

Benefits vs Features

Think of a car manufacturer: a feature of a new car may be a cutting-edge engine. But this means very little for many consumers and that is why car manufacturers translate the feature into relevant metrics for them. Even better: they communicate the same feature to different segments using different benefits!

The great engine becomes a time performance expressed in 0-60mph (or 0-100kmh) to appeal to thrill-seeking drivers, or a yearly fuel-saving measure to appeal to families. Even if both segments are interested in the same car – with the same engine – they value different benefits.

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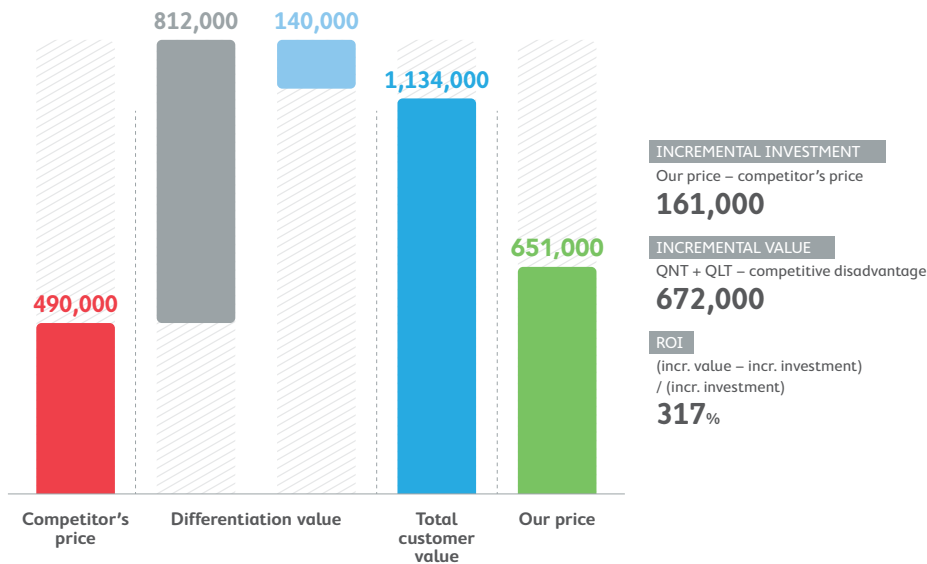
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Step 4: Calculate the economic value of competitive advantages to consumers

Many companies struggle with this step. Identifying features is easy, but identifying benefits requires understanding segments and segment-specific needs, and quantifying value is the high art, the craft, that allows the best companies to put a price on value (Hinterhuber, 2017).

There are a variety of approaches for translating features into benefits, and benefits into customer-specific economic value. Hinterhuber & Partners has developed the VQT (the Value Quantification Tool) that helps quantify customer-specific value across virtually all industries.

Step 5: Communicate the three to five differentiating factors that provide the biggest bottom line impact on the consumer

About 80% of the economic value that differentiates an offering from the competition can be summarised in three to five benefits. They may be segment-specific, but usually one or two competitive advantages are common to all segments. These are the ones to leverage in company communication, sales pitches and on the front of the product label.

Art, craft and science

Value-based pricing is about putting the customer at the centre of the pricing process in order to drive both customer satisfaction and profits. This pricing approach is a science, a craft and an art.

A science, as it is based on robust, scientific research into customers; a craft that can be learnt as companies implementing value-based pricing get better at it by doing, learning and experimenting; an art, because each company needs to find its own, unique way to create, communicate, deliver and price for value. ♦

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Hinterhuber, A. (2017). Value quantification capabilities in industrial markets. *Journal of Business Research*, 76, 163-178.



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India

India was an extremely small sector in 2007; now it is the fastest growing pet industry in the world. If you live in India you can almost feel it happening, as pet shops pop up all over the place. An exciting market with new players and its own dynamic, challenges and changes!

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Indian pet industry growing by leaps and bounds

What was an extremely small sector in 2007 is now the fastest growing pet industry in the world. If you live in India you can almost feel it happening, as pet shops pop up all over the place.

Dogs rule!

The Indian market is unique in many ways. For example, contrary to global trends, the dog is the most popular pet in India. Cats make up just 10% of the total pet population.

Humanisation

Average family size in India is shrinking. Smaller families and a change in mindset are fuelling a growing trend towards pet ownership. Children go to more progressive schools and feel the family is not complete without a pet. Pet owners are also evolving into pet parents, who treat their pets like family members.

Premiumisation

Pet owners in India are from upper class or upper middle class families. Purchasing power has grown dramatically as disposable income increases. So the nature of consumption is also likely to change immensely over the next twenty years. Pet parents want premium products for their beloved pets.

From equine doctors to small animal vets

A key change in the Indian pet industry is the way veterinary clinics have evolved. Historically, veterinary services in India were there to help large animals. The first veterinary college was started by the British in 1862 to train people to treat army

horses. As the pet industry grows, veterinary science has also entered a new era.

In the late 90s, pet owners gained access to the internet and veterinarians had to adapt to new trends in medicine and diagnostics. In the past decade, veterinary clinics have begun to approach petcare very differently, offering many more treatment facilities. New clinics have opened and existing ones are being upgraded.

New digital world

Pet owners in India are now digitally savvy and well educated. This means there is an untapped market that is expected to follow the path of more developed nations. Start-ups appear regularly, each with their own innovations, and some offering solutions using the internet of things (IoT).

The internet has lowered many barriers to building brands, as sales channels become more democratic. In this new environment, there is a rise in so-called digitally native vertical brands: those 'born' online. Just one of the many exciting things happening in the Indian pet industry. ♦



Rana Atheya
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Indian pet shops come of age

Until a few years ago, India had only a handful of pet shops run by people who knew very little about pets. It was just another business for them. That market scenario is changing fast.

Online and down the road

Stand-alone and chain stores now have impressive interiors and qualified staff to cater to the growing number of pet lovers. The expansion of brick and mortar has also been fuelled by an increasing number of veterinarians opting to specialise in small rather than large animals.

But it is the internet and mobile revolution that has led to a completely new retail scenario. The availability of pet products online spiked quickly in India. Besides giants like Amazon, there are also home-grown players like DogSpot and Flipkart, now the largest Indian e-commerce company.

Their high online sales are not only competing with the smaller pet e-retailers but have also expanded the total customer base.

The young generation is particularly attuned to shopping online. Rana Atheya set up DogSpot: “Being the first mover had some advantages but it is challenging to make it financially viable unless you educate the customers. We have come a long way now and things have improved. Suppliers work more efficiently and transparently and many brands have dedicated resources for e-commerce sales.”

Veterinary retail

Veterinary clinics are now one of the most important retail channels. Initially they stocked just a few products. According to an industry expert, “They had perhaps two shelves for pet products ten years back – today half their clinic displays pet merchandise. They have taken veterinary practice and services as far as they can, and are now offering much more general petcare. It is a win-win situation for pet owners.”



Going upmarket

On the other side of the retail spectrum, upmarket pet shops have expanded their product range and retail space. Glenand India is an example, and probably the oldest. It has four good-sized shops in Bengaluru, Karnataka. Prithivi Jayakaran explains: “We plan to expand to other South Indian cities. The main source of revenue for any pet store is pet food, and the number of international brands coming to India has contributed to the growth in pet retailing.”

Local chains are flourishing

About ten years ago, Rhys De Costa could not find suitable products for his Rottweiler dog so he set up his first store - 79 The Pet Stop. Now he has eleven stores across Goa and is expanding fast. By the time you read this, he may have opened his thirteenth store.

Just Dogs is the brainchild of Ashish Antony, a certified K-9 Specialist from the Police Dogs Centre in Holland, and operates out of Ahmedabad. The company has 22 stores in Ahmedabad, Gandhinagar,



Vadodara, Rajkot, Surat, Patna, Indore, Mumbai, Pune and Thane – eighteen of them franchises.

Heads Up For Tails stores belong to Rashi Narang Design and sell products under the Huft brand. They have fourteen stores in Delhi, Noida, Gurgaon, Mumbai, Pune and Bangalore and four more in the pipeline. Rashi: “We are keen to grow this slowly, taking the time to get it right. We hope to have about 25 stores by the end of 2019.” She is the first to open a pet shop in popular Indian shopping malls, one in Delhi and one in Noida.

Passion for pets works

All in all, today's Indian pet industry is on solid ground. The demands of the increased number of pet owners are being met by pet shops, veterinarians and groomers. New manufacturers and importers are offering more product options. But the gap between supply and demand is still huge. There are a lot of stores in different cities, but there is still potential for expansion in the coming years.

The new players in the retail sector, whether online or brick and mortar, are making a big difference to petcare. As pet lovers, they bring that special passion to the business. They are realistic and hands-on in all they do, from choosing products to training store staff. ♦



Binoy Sahee

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New wave of Indian petcare products

India has always exported leather collars and leads, steel feeding bowls and treats. But the Indian market itself has gone through significant changes in the past few years. Let's focus on some Indian players.

Drools

Drools pet food was launched a few years back by the Indian Broiler Group, a conglomerate based in Rajnandgaon, Chhattisgarh. It is the first company in India to produce extruder pet food for dogs and cats. Drools have a pan-India presence and the products are sold at various dog shows. When they entered the market, everyone thought they were going to be a strong competitor to Pedigree, as Mars had been the only company in India producing products like these. But it seems that there is room for more than one such food manufacturer as demands soar.

Taiyo

Taiyo Feed Mill was founded by Mr. RS Prabakar, based in Chennai. Taiyo pet food brands are Taiyo, Aini, Okena, Ultima and Petslife. The company also produces private labels. Having successfully created a niche in the market, Taiyo is managing to co-exist with foreign brands.

Pet En Care

Pet En Care is sold by the export-oriented company AOV International, who are now promoting their products on the domestic market too. Pet En Care products are affordable, quality treats for dogs, such as Chicken Munchy Bone, Bleached Bone and Smoked Bone.

Dogsee

A yak milk dog treat is marketed by Khanal foods under the brand name Dogsee Chew. This product is sourced from the Himalayas and 100% vegetarian. Their latest all-natural treat is fruit and vegetable cookies called Dogsee Bites. Both products are available in other countries too.

Canes Venatici

Fashion designer duo Akash Sinha and Arpan Joshi started dog apparel company Canes Venatici, redefining the fashion quotient for dogs. Today, in just about every dog fashion show you see their clothing.

Terrai

Terrai Natural Products have a range of high quality natural shampoos for dogs. Established in 2010 by Dhruv Kumar, a Delhi-based entrepreneur, the company's skin and hair care products are based on Ayurvedic formulas, designed to effectively cater to specific needs. ♦



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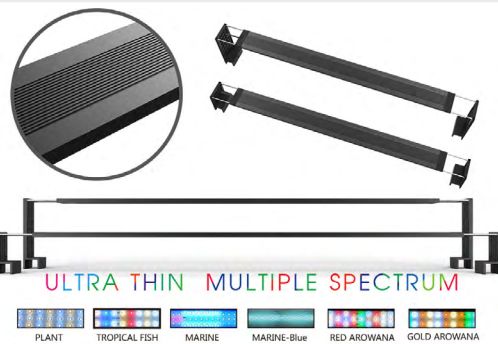
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