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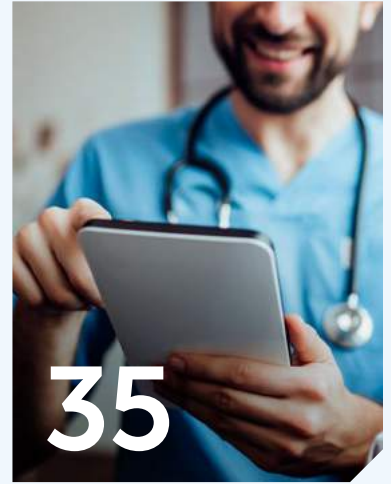


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Regional report: Southeast Asia

It's an exciting moment of potential for the industry across this area as pet ownership increases and the market grows and evolves.

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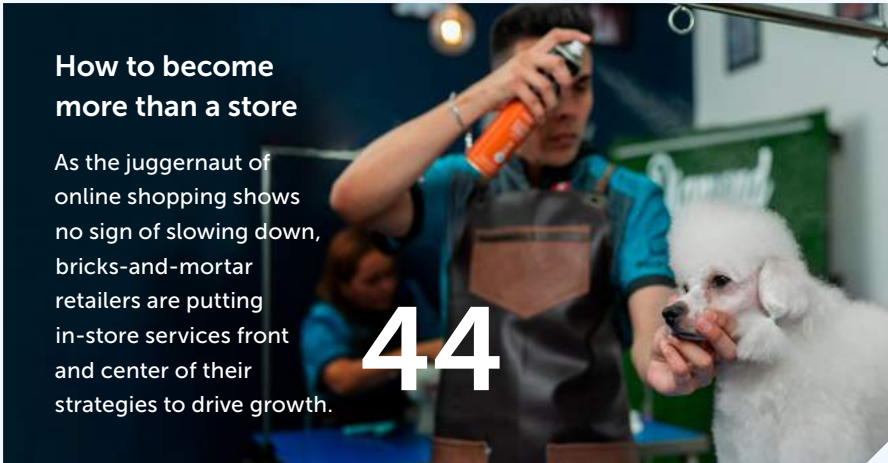
Moves to modernize veterinary care

Providers are making use of technology to make veterinary services quicker and more accessible, and respond to pet owners' demands for greater convenience.

How to become more than a store

As the juggernaut of online shopping shows no sign of slowing down, bricks-and-mortar retailers are putting in-store services front and center of their strategies to drive growth.

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Brain power: clever uses of bionics in pet food

There's increasing interest in the versatile role bionics can play in pet health and well-being, from gut condition to brain function.

GlobalPETS Forum 2024

Pet industry leaders gathered in Venice to tackle head on issues including AI, sustainability and shifts in the pet-owning population's behaviors and priorities.

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L'union fait la force

Although originally used in an armed conflict, this message, which some countries even have inscribed in their code of arms, can be applied to our industry. Because unity makes strength.

This is the feeling I had when attending the recent GlobalPETS Forum in Venice: different nationalities, different businesses, different strategies – but all with the same objective of working together to ensure a bright future for the pet industry.

I took quite some notes during the keynotes, but if I had to make a quick summary, I would say that the industry (still) has a lot of potential to develop. A key aspect of this is adapting to the ever-changing worlds of trends and technology, and never forgetting what the consumer wants from us.

On the other hand, the industry needs to address daily global challenges. The supply chain is one of them and was a hot topic of discussion for some attendees during coffee breaks.

We recently asked our newsletter readers if they had experienced any supply chain challenges in the past 6 months and almost 69% responded positively.

Delays were the most common, followed by rising transport costs and raw material shortages.

The motto I mentioned earlier also applies to these headwinds, which are not specific to our industry but are affecting many in some way. Sharing our experiences and best practices to make our businesses run as smoothly as possible in these times is essential to unite and move forward together as an industry.

By the way, we have already started working on the program for the next GlobalPETS Forum in Prague in 2025 and I will make sure to keep you updated.

Last but not least, if you are attending Interzoo in Nuremberg in May, don't hesitate to drop by and say hello. We will be in Hall 1, stand 139.



David Palacios Rubio
Head of Editorial

“The only way you are going to have success is to have lots of failures first.”
SERGEY BRIN, CO-FOUNDER, GOOGLE

 **PETS International**
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Intermedium Publishers BV
Newtonstraat 3
1098GX Amsterdam (NL)

+31-33-4225833
content@pets.nl

Editorial team

Managing Director: Philippe Vanderhoydonck
Head of Editorial: David Palacios Rubio
Head of Operations: Lisa van Roon
Senior Editor: Janetta Willis
Editors: Jessica Martindale, Lynn Radford,
Mandy Wolters-Savage, Elizabeth Youens
Design: Hester de Gier

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Fresh consumer insights for Australia, UK and Hungary

Australia's largest not-for-profit health fund, HCF, has recently concluded that 4 out of 5 pet owners are concerned about how much it costs to take care of their pets. The same amount of owners said they are planning to use strategies to cut expenses, including buying pet food in bulk (46%) and grooming their pets at home (43%).

New research by financial service company Cofidis concluded that Hungarian dog owners spend HUF12,000 (\$33.78/€31.09) on food per month and HUF47,000 (\$132.32/€121.75) on care and veterinary services per year.

Compared to its 2018 survey, this marks an almost 33% increase in pet expenses. Euromonitor reveals that the country has witnessed the most significant rise in pet care product prices (22%) in Eastern Europe.

In the UK, Cats Protection says that 34% of UK cat owners are negatively impacted by the rise in living costs. A recent survey of this welfare charity found that 7% have reduced their spending on necessities like food and litter in the past year.

Furthermore, 28% of cat owners have reduced the frequency by vet visits due to high costs. Healthcare (15%) and food and litter costs (13%) were also cited by respondents as reasons for not becoming cat owners.

Interzoo 2024: bigger and better

The leading international trade fair for the global pet industry, which will take place from 7 to 10 May in Nuremberg (Germany), expects to break records with the participation of over 2,000 exhibitors from more than 70 countries.

This year registrations have witnessed increased interest from the US (+60%), India (+34%), Italy (+31%), Poland (+27%) and Turkey (+26%).

More than 8 out of 10 exhibitors will be companies dedicated to cat and dog products, followed by small animals and rodents (14.1%), aquariums and terrariums (13.3%), ornamental birds (11.6%) and pet food technology (8.4%).



Premium pet food brand partners with Indian hotels

Bengaluru-based Harley's Corner has extended its premium wet pet food to 24 hotels after recognizing a category demand from traveling pet parents.

Pet owners can now order the brand's food for their furry friends through the in-room dining service of the SeleQtions hotel chain.

The company expects to roll out the service to luxury properties soon, as well as co-working spaces, managed homestays, serviced apartments and dog boarding facilities.





VAFO adds Dagsmark Petfood to its Nordic portfolio

Czech group VAFO has secured a leading position in the Nordic pet food market with its latest acquisition of Finnish pet food producer Dagsmark Petfood.

After adding the new company to the portfolio, VAFO is banking on its strong “growth potential” into expand to other Nordic countries. “Our goal is to achieve over 20% market share in all Nordic countries,” says the company.

The group plans to invest around €10 million (\$10.8M) over the next 3 years to develop the company’s production capacity.

Maxi Zoo becomes Fressnapf in French-speaking Switzerland

The German pet retailer wants to unify the 18 shops that the retailer has in the Swiss region of Romandy with the same branding as the rest of the country.

“This strategic decision reflects our ambition to create a clear and consistent brand identity throughout Switzerland,” says Hermann Aigner, CEO of Fressnapf Switzerland.

Fressnapf has 67 stores in Switzerland and plans to reach 85 by 2026.

The company recently announced it hit €4 billion (\$4.36B) in turnover in 2023, with its international business growing by 19%.



Poland’s pet food exports rake €1.9B

The Polish Economic Institute reports that the country’s pet food exports totaled €1.9 billion (\$2B) in 2023. Dog and cat food alone totaled €1.6 billion (\$1.48B), representing 76% of the volume of all pet food exports.

Poland exported cat and dog food to 76 countries, primarily Germany (34%). The UK (6.9%), Italy (5.4%), France and Czech Republic (both 5.3%) and Romania (4.6%) followed.

The International Trade Centre says that Poland was the 5th largest exporter of pet food globally in 2022, with a market share of 7.6%.

According to GfK’s Consumer Panel Services, the Polish pet food market was worth PLN 4.3 billion (\$1.06B/€980M) in the 12 months ending August 2023.



The Petshop gears up for Qatar and Saudi Arabia debut

UAE’s largest pet retailer is striving to open 3 to 5 more locations in Dubai, Ras Al Khaimah and Sharjah and make its first international expansion to Saudi Arabia and Qatar between Q4 2024 and Q1 2025.

CEO Amr Hazem tells PETS International he expects 15% to 20% in revenue growth in 2024.

In February, the pet retailer launched a new daycare and boarding facility under sister company Petsville at its Dubai Investment Park location after witnessing a trend led by Dubai expats in increased spending ability and demand for pet daycare and boarding services.



Westfleisch scoops up The Petfood Company

Germany's 2nd largest meat marketer, Westfleisch, has bought The Petfood Company's entire business as of 1 February.

The Petfood Company had to file for insolvency at the end of last year, which ultimately led to its acquisition.

"In view of the strong demand from our retail partners, we see high growth potential for The Petfood Company's premium products. We want to exploit this together," says Wilhelm Uffelmann, CEO at Westfleisch.



New Zealand's Pet Direct lands undisclosed funding

The online pet retailer secured a significant investment to enhance its online platform and improve customer experience.

With this fresh funding led by private equity firm Pencarrow, the Auckland-based company also plans to venture into the "physical realm of retail" by opening bricks-and-mortar stores in the country.

Pet Direct CEO Dave Anderson says that the company's range of products, pricing and service propelled it toward "quickly" gaining market share, aided by the shift to online seen during the pandemic.

Pet brands among best large employers in the US

American business magazine Forbes asked 170,000 employees working for large American firms to rate their companies. Of the 600 companies ranked in this year's list, 8 belong to or do business in the pet industry.

Pet food manufacturer General Mills was the highest pet player on the list, at position 168. The maker of Blue Buffalo was closely followed by online pet food retailer Chewy at 190.

Private label manufacturer Simmons Foods stands in 3rd place at 195, followed by Merck & Co, the parent firm of Merck Animal Health at 208. Tractor Supply, the owner of Petsense, came in at 321.

Big multinationals with a pet business also made it onto the Forbes list, including Mars (264), Nestlé (379) and J.M. Smucker (489).



DATA INSIGHT



1 in 6
pet parents
switched to
cheaper brands

BENEO's Consumer Research On Pet Care 2023 found that 90% of pet parents in the US, UK, Brazil, Germany and China felt the price hike in the last year. Most of them maintained brand loyalty by opting for promotional offers and buying bigger packs.

NEW APPOINTMENTS

 **Petco**

The American pet retailer appointed Mike Mohan Interim CEO after Ron Coughlin stepped down. Mohan has been the company's Lead Independent Director since July 2021.

 **Pets at Home**

The British pet retailer appointed Anja Madsen as the company's new retail COO.

 **Symrise**

Jean-Yves Parisot assumed the position of CEO of the German company after Heinz-Jürgen Bertram's 15-year tenure. Parisot is the current President of Taste, Nutrition & Health, which includes the company's pet portfolio.

TOP 3 INVESTMENTS



PE firm Blackstone now owns online US pet marketplace **Rover** following a \$2.3 billion (€2.1B) all-cash deal.

Jollyes, the UK's second-largest pet retailer, has been sold to London-based TDR Capital for a reported £130 million (\$164.6M/€151.8M).



Israeli agritech firm **FreezeM** landed \$14.2 million (€13.1M) in its Series A funding round.



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Fressnapf
hit record
€4 billion
turnover
in 2023

The German pet retailer increased its business by 15% in comparison with 2022. The national market accounted for €2.1 billion (\$2.27B), while international operations grew by 19%.

How pet food fared in Black Friday week

This annual sales event is also on the pet industry calendar, with many retailers opting for strong promotional activity. PETS International compares the week's sales in 2023 with the same period in 2022.



Paula Flores
Contributor
PETS International

Originating in the US, Black Friday has become an increasingly important sales opportunity around the world. Data for food and treats in the US, France, the UK and Germany shows which sales channels and product categories were the late November winners and which lagged behind.

US grocery stores beat pet specialists

During the week of Black Friday 2023, Nielsen value sales data for the whole cat and dog food category in US pet specialists and e-commerce showed cat food posting a modest 2% growth, while dog food grew by 1%.

Retail sales at grocery stores gave a more positive performance. Cat food increased by 8% that week, and dog food by 4%. In this channel, total pet food reached \$460.4 million (€425M), representing 5% growth. This is still below 2022 performance, when total value sales grew by 17%.

Effects of higher prices

In 2023, the pet industry wasn't immune to the inflation spikes experienced globally and prices soared in the US market. This put many pet-owning households under increasing pressure. On average, prices at pet specialists increased by 20% for cat food and 31% for dog food. This had an impact on sales, making consumers more price-conscious and causing volumes to suffer.

 **BLACK
FRIDAY**





From an overall category perspective, volume sales for cat food posted an 8% decline and dog volumes shrank by 10%, a trend that continues from previous years. Nevertheless, analyzing per household value expenditure, the scenario is quite different for dog and cat owners. Cat owners increased their spending across all categories, whereas dog owners remained more cautious.

From an overall category perspective, volume sales for cat food posted an 8% decline and dog volumes shrank by 10% in the US.

Wet cat food wins at specialty stores

Posting 7% value growth, wet cat food was the best-performing category among pet specialists in the US. That was followed by cat treats, which grew by 3%. Although volume per household declined in both categories, -13% for wet food and -22% for cat treats, wet food sales reached \$101.6 million (€93.8M) and cat treats amounted to \$15.7 million (€14.5M). This shows that pet parents will go to great lengths to pamper their pets, as well as how important food quality and variety are for cat owners.

Other types of cat food

A category where price seemed to have had a clear impact on consumer choices is newer types of cat food, such as fresh, frozen, freeze-dried and dehydrated. Value sales for this declined by 7% at pet specialists and, with prices having risen by 37% in a year, cat owners seemed to have shifted to more affordable categories as volume sales dropped by 32%. This is in contrast with category performance at grocery stores, where sales grew by 15%. Dry cat food value sales in this channel also rose by 11%, outperforming wet cat food, which grew by just 5%. [▶ SEE NEXT PAGE](#)

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Differences in dog food

The picture differs greatly when it comes to dog owners. Value sales increased across the whole dog category, except for dry food. But, similarly to cat food, volume sales declined across all but one category. Dog treats suffered the steepest decline, with volume sales dipping 33% and unit prices rising 55%.

In value terms, it was the newer types of dog food that were clear winners. Experiencing a 63% value rise, it was the only dog food category where value sales were also coupled with a staggering 43% volume sales rise – although departing from a lower base. Sales of this product category at pet specialists amounted to \$28 million (€25.8M). Sales per household increased by 20%, as new consumers were drawn to this format. Mass-market value sales experienced a similar performance, with the category outperforming all others. Value sales reached \$18 million (€16.6M) from \$13.7 million (€12.6M) in the previous period, a 31% increase.

Wet dog food was the second best-performing category, as value sales increased by 6%. There seems to be a renewed demand for wet food, despite prices increasing by 24%. Looking at dollars spent per household, nothing could beat the appeal of dry food, with households spending \$30 (€28).

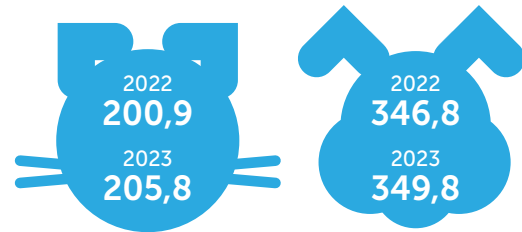
Cat food outperforms dog food in France

Cat food value sales at pet specialists reached €39.5 million (\$42.8M), with 6% growth. The category was even more dynamic at grocery stores, where sales amounted to €37.6 million (\$40.7M) and posted

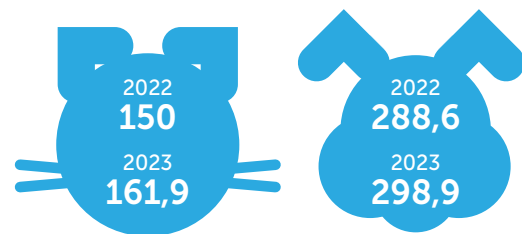
Wet multi-serve was the UK's best-performing category, with 15% value sales growth it was the only one to also increase volume sales.

Value sales of pet food (including treats) during Black Friday week 2023

(in \$ million)



Cat and dog food in the US



Cat and dog food in France, Germany and the UK

Source: NielsenIQ

a 10% increase. With cat value sales in mass-market representing double those of dog food, this increase is no small feat for the industry. Owners seem to have spared no expense to pamper their cats, and this was seen in both channels.

Wet multi-serve for cats does well

At specialists, wet multi-serve cat food posted an impressive 29% value sales increase and treats rose by 15%. Rising prices didn't keep consumers away – some of the biggest price hikes occurred in these 2 categories. Wet multi-serve prices rose by 25% and cat treats by 17%. Wet multi-serve cat food also performed better than other categories in mass-market, as sales grew by 21% despite a 16% price increase.

▶ SEE NEXT PAGE

Dog sector sales disappoint

At pet specialists, dog food sales reached €23.6 million (\$25.6M), a disappointing 14% decline. Dry dog food was one of the main category losers, as value sales went down by 22%. The category performed better in mass-market, where sales flatlined and total dog food sales stood at €17.1 million (\$18.5M), representing a mere 1% increase.

UK cat owners prefer grocery stores

The pet industry in the UK has been faced with several challenges recently. From the inflationary pressures across most of 2023 to the supply chain challenges related to Brexit, pet manufacturers have had a lot to contend with.

Cat food value sales experienced a 1% decrease at pet specialists but grew by 7% in mass-market, where sales were £3.2 million (€3.7M/\$4.1M) – driven by the good performance of both dry and wet cat food. Wet food sales at pet specialists, at £23.3 million (€27.3M/\$29.6M), did help to stave off a general decline there, with total cat food reaching £33.9 million (€39.7M/\$43M), despite a 13% drop in dry food and treats.

Dog treats and multi-serve keep up

At the total category level, value growth was flat for dog food at grocery retailers, but up 2% at pet specialists. Good performance by dog treats at specialists meant that dog value sales reached £39.6 million (€46.4M/\$50.3M). Treats were one of the largest categories at £14.5 million (€17M/\$18.4M), posting 7% growth. Wet multi-serve was the best-performing category, with 15% value sales growth it was the only one to also increase volume sales, by 7%.

German pet owners unfazed by price hikes

The trends in the German pet food market were very different to the other countries. Value sales for cat food grew by 11% during Black Friday week,

Dog food value sales reached €33 million (\$35.8M) at German specialists, an impressive 21% growth.

reaching €36.9 million (\$40M) in mass-market. At pet specialists – including e-commerce – value sales for cat food amounted to €39.6 million (\$42.9M), representing 3% value growth. While this was already good news for the industry, dog food sales were even more successful. Their value sales reached €33 million (\$35.8M) at German specialists, an impressive 21% growth, and €18.7 million (\$20.3M) at grocery and pet stores – 6% growth.

Impressive dry dog food sales

At pet specialists, dry dog food was particularly appealing to German consumers, posting a staggering 64% value growth, even in the face of prices rising by 15% since the previous year. Wet multi-serve was also popular among dog owners, with sales increasing by 33% as prices rose by 31%.

Satisfactory cat food sales

Cat food value sales at grocery and pet stores posted good growth, with dry food rising by 17% and wet food by 9%. Wet food sales account for 80% of total cat food. Cat care and treats also performed well, with sales reaching €6.7 million (\$7.3M) – 13% growth. At specialists, cat dry food sales for that week amounted to €8 million (\$8.7M) – 21% growth – and wet food €25.3 million (\$27.4M) – a 3% decline. ♦

All sales data given in this article refer to the week of 24 November 2023.

All percentages compare the data with sales during the same week in 2022.

Rapid market expansion and room for growth



It's the perfect moment for pet care businesses to make the most of dynamic trends and evolving consumer choices as Southeast Asia's growth rate remains relatively high.



Ekaterina Tretyakova
Consultant
Euromonitor International



Sahiba Puri
Consultant
Euromonitor International

In 2023, the market size for pet care in Southeast Asia – including Indonesia, Malaysia, Philippines, Singapore, Thailand and Vietnam, while modeling markets in Brunei, Cambodia, Laos and Myanmar – was estimated at \$3.3 billion (€3.1B). At \$3 billion (€2.8B), the pet food sector dominates the Southeast Asian pet care market, accounting for 90% of sales. We look at the key factors driving pet food sales growth in the region, and the outlook for the future.

Growth and expansion rates

Over the past five years, the market has experienced rapid development with a Compound Annual Growth

Rate (CAGR) of 13% in value terms. The global cost of living crisis in 2022 had an impact on its development, leading to a slowdown in growth. Plus, as markets approach higher saturation, growth rates are anticipated to decelerate, with the CAGR decreasing to 9% in the 2023-2028 period. Nevertheless, this rate remains higher than in Asia-Pacific as a whole or other global regions. With prepared food consumption and pet ownership remaining relatively low, there is room for growth and the markets are expanding rapidly.

Markets by country

The remarkable growth of the Southeast Asian pet food market can be primarily attributed to the rapid development of the pet food markets in Thailand, Indonesia and the Philippines. The largest market both in volume and value terms is Thailand at \$1.5 billion (€1.4B), which accounts for nearly half of the entire Southeast Asian market. As a result, its dynamics significantly influence the development of the regional market.

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While Thailand made a solid contribution due to its size, the other two countries experienced the highest growth rates. Indonesia witnessed more than threefold growth between 2018 and 2023, and the Philippines doubled in size over the same period.

Fastest-growing sections

Mid-priced pet food is the bulk category within pet food in Southeast Asia, accounting for 44% of total sales in 2023. Meanwhile, the fastest-growing categories over 2018-2023 were premium pet food, and treats and mixers, both experiencing a 16% CAGR. This growth is driven by humanization and premiumization trends coming from more mature Western markets. In 2022-2023, impacted by declining purchasing power, the growth rates of premium pet food slowed down but remained at the 14% year-on-year level, the fastest within pet care categories.

Dogs versus cats

Cat food exhibited faster development than dog food from 2018 to 2023, achieving a 16% CAGR, whereas dog food recorded 11%. Cat food already accounts for 42% of all pet food sales in the region, and that share is set to expand further.

The rapid growth of the cat food market is attributed to the increasing ownership of cats. Since 2018, the cat population in the region has surged by 43% and is expected to further propel the development of cat food over the forecast period. This is linked to the urbanization process, as it's more convenient to keep a cat in a small urban apartment.

In the years ahead, the fast-growing pet care markets in Southeast Asia will become more visible on a global scale.

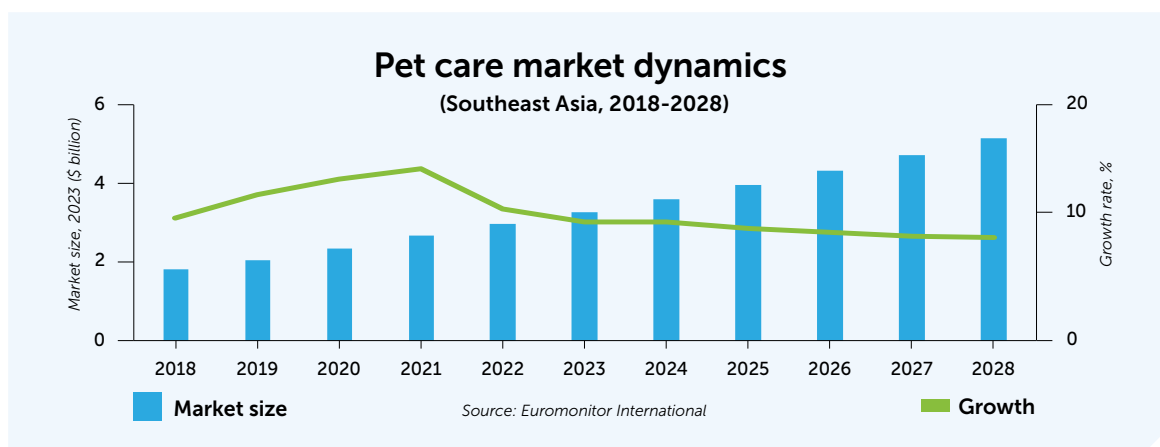
In line with the rising popularity of cat ownership, cat treats and mixers, and premium cat food – both wet and dry – have grown the most since 2018. Treats and mixers are becoming increasingly premium, with many brands developing products containing vitamins and functional ingredients.

Meanwhile, the cost of living crisis of 2022-2023 also intensified market polarization. Besides the continued growth of the premium products, the economy segment also strengthened as consumers sought the best deals and more affordable options.

Looking for healthy products

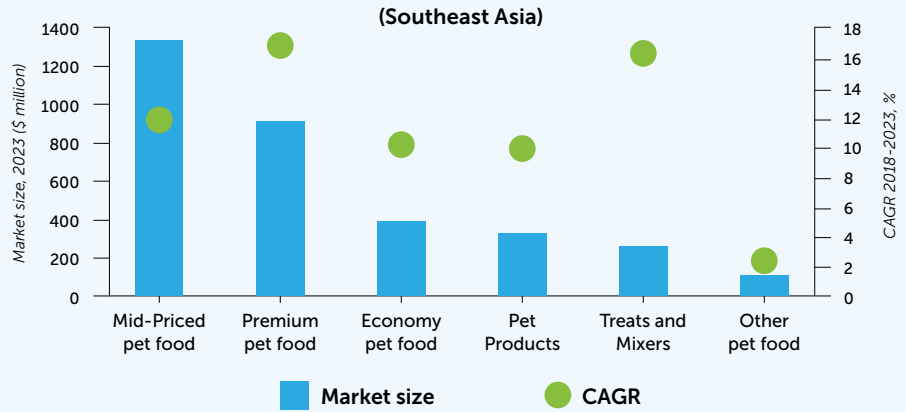
In line with the ongoing tendency to humanize pets, pet parents have become more conscious of their pets' health and wellness. Echoing the global trend, Southeast Asian countries share the same top functional claims: high protein, natural, a good source of vitamins, and immune system health.

The market penetration of pet food products with such claims in Indonesia and Singapore increased rapidly over the period 2019-2022. It's now significantly higher than the global average, and distinctly higher than in the Asia-Pacific market, where the percentage of such claims is less than 10%. In fact, in this respect Southeast Asia is more comparable to the mature markets of North America and Western Europe. [▶ SEE NEXT PAGE](#)





Dynamics of the pet care categories



Pet care forecast market dynamics



Source: Euromonitor International

The market in Thailand recorded much more modest growth rates for these claims, being overshadowed by health-specific claims such as 'bone health', which are developing rapidly in the market.

Future growth rates

Over the period 2023-2028, the pet care market in Southeast Asia is poised to record 9% growth, with premium cat food driving the market. The evolution of channels will significantly contribute to market growth, as the e-commerce channel in pet care is expected to double in size in the region. Within online sales, subscription pet meal plans – as one form of direct-to-consumer (D2C) activity – will gain more visibility.

The Indonesian and Vietnamese pet care markets are expected to record the fastest growth rates from 2023-2028 due to the rise in pet ownership. Meanwhile, Thailand will contribute the most to the overall dynamics of the pet care market in the region thanks to maintaining relatively fast growth rates.

Global visibility

The pet care market in Southeast Asia is undergoing a significant transformation, marked by rises in pet ownership, humanization and awareness of pet health. In the years ahead, the fast-growing pet care markets in Southeast Asia will become more visible, not only within the Asia-Pacific region but also on a global scale.

In particular, Thailand and Indonesia are expected to be among the world's top 10 countries with the highest absolute growth in pet care from 2023-2028. In view of these dynamic trends and evolving consumer preferences, businesses should not miss the chance to capitalize on the emerging opportunities in this region. ♦

The data quoted in this article is based on Euromonitor's Pet Care edition 2024.

David Ng Whye Tye, CEO of Pet Lovers Centre

“Our website and marketplaces will be our main means of growth”



The largest pet retailer in Southeast Asia wants to continue growing its footprint with new stores, but also to expand its customer reach by partnering with e-commerce giants and supermarkets.



David Palacios
Head of Editorial
GlobalPETS

The solid operations in its homeland Singapore as well as Malaysia, Thailand, Vietnam, Brunei and the Philippines are testimony to the ability of Pet Lovers Centre to align with customers' needs. Whereas a few years ago, before COVID, e-commerce represented just 5% of its total sales, nowadays it accounts for nearly 18%.

Furthermore, orders representing more than 22% of sales are delivered directly to pet owners' homes. At a time when consumers in the Asian region are changing the way they shop, David Ng Whye Tye shares how the retailer is adapting to the new trends. He also outlines the challenges of operating across several countries.

How has the retail market changed since your company started 5 decades ago?

My father started the company in 1973 and I came into the business in 2003. When we started, there were very few pet stores in Asia, and those that did exist were

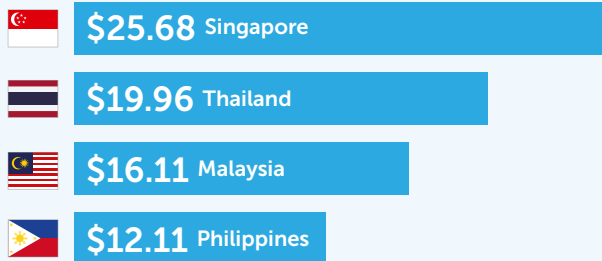
terrible. Pets were not something that people looked at. But this has changed over the years and we've grown from just 7 stores to 170 across Asia. There are now 200 pet stores in Singapore alone, of which close to 70 are owned by us. We are a major player in Malaysia as well, and we will probably soon be the largest pet retailer in Thailand.

[▶ SEE NEXT PAGE](#)

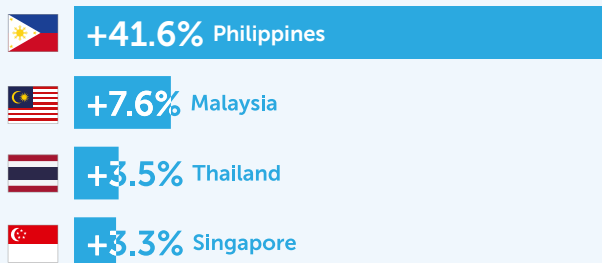


Average customer expenditure in store

(as \$ equivalents)



Year-on-year retail growth



Source: Pet Lovers Centre

Which markets still offer opportunities?

We have tremendous room for improvement in Malaysia, Thailand, Vietnam and the Philippines. The multi-billion-dollar pet industry in Thailand allows us to tap into the huge market, with growing stores to support it.

And what about challenges?

We find it extremely challenging to enter many malls, especially in Thailand. We tend to first start with the malls in cities like Bangkok, as opposed to stores in small towns – simply because our target audience is not there. We need slightly higher-income customers and they usually go shopping in malls.

Thailand also continues to be a very difficult market to grow in, especially for bringing international brands into the country. Unlike in Singapore or Malaysia, where we

“When we started, there were very few pet stores in Asia, and those that did exist were terrible.”

import goods from all over the world, we only manage to get a small percentage of the brands into Thailand. One of the main reasons for this is that Thailand is a huge producer of pet food, making it much easier to build brands within the country itself.

How are you managing all this from a logistics point of view?

When it comes to food, we need to get the products into the warehouses of the specific country. Non-consumable products are significantly easier because they do not require veterinary certificates and additional paperwork. However, we only ship non-consumables from our central warehouse in Singapore if the country is small. When we hit a certain volume, everything is shipped to and from the country of origin.

How do you match prices in the different markets where you operate?

The cost of importing dog food into Singapore and Malaysia is the same. Maybe it gets a little bit more expensive in Malaysia, simply because it is a larger country and the cost of distribution is higher. However, the buying power of Malaysians is significantly lower than that of Singaporeans. This means that the price of goods you sell cannot be matched to the selling price in Singapore. Generally speaking, in Malaysia you can buy goods and services at 30% below the selling price in Singapore.

What’s your store target?

Our overall 5-year plan is to hit well over 400 stores. In Thailand, we will probably hit about 130 new store openings, followed by Malaysia (126), Indonesia (108) and the Philippines (71). We are certain that we will continue to grow our store network, but our website and marketplaces will be our main means of growth.

Why the strong focus on your website and marketplaces?

In Singapore, more than 80% of our clients are offline customers. But before the pandemic, online customers represented between 4% and 5%, whereas now the figure is as high as 18%. For companies to be successful, you have to join the bandwagon. We can no longer say no to online players. We should be on all marketplaces, on our website and also in as many bricks-and-mortar stores as possible to align with the spending behavior of

the majority of Asians. And ideally, all these channels need to be holistically integrated.

Our shop is already integrated into online platforms including Amazon, Lazada, Shopee, GrabMart and Pandamart. We are one of the few companies that is poised to grow in whatever way the customer wants to shop.

You are also present in supermarkets...

We are currently working with the government-run cooperative supermarket NTUC FairPrice in Singapore. We have a small area within the supermarket where we sell some of our products. We started this concept in 2019 and we now have 6 stores.

Do you have plans to further expand this concept?

Expansions depend on the right opportunity and timing, and negotiations between the supermarkets and us. If you would ask me if we plan to expand in this way, my answer would be 'why not?'. But it's also a question of whether supermarkets are willing to give us this visibility. We have to sell ourselves well to make sure that we are 'sexy' to them.

Any plans to expand the business to new countries?

We will continue focusing on Southeast Asia for now because of the region's potential and because our footprint here is still small. ♦



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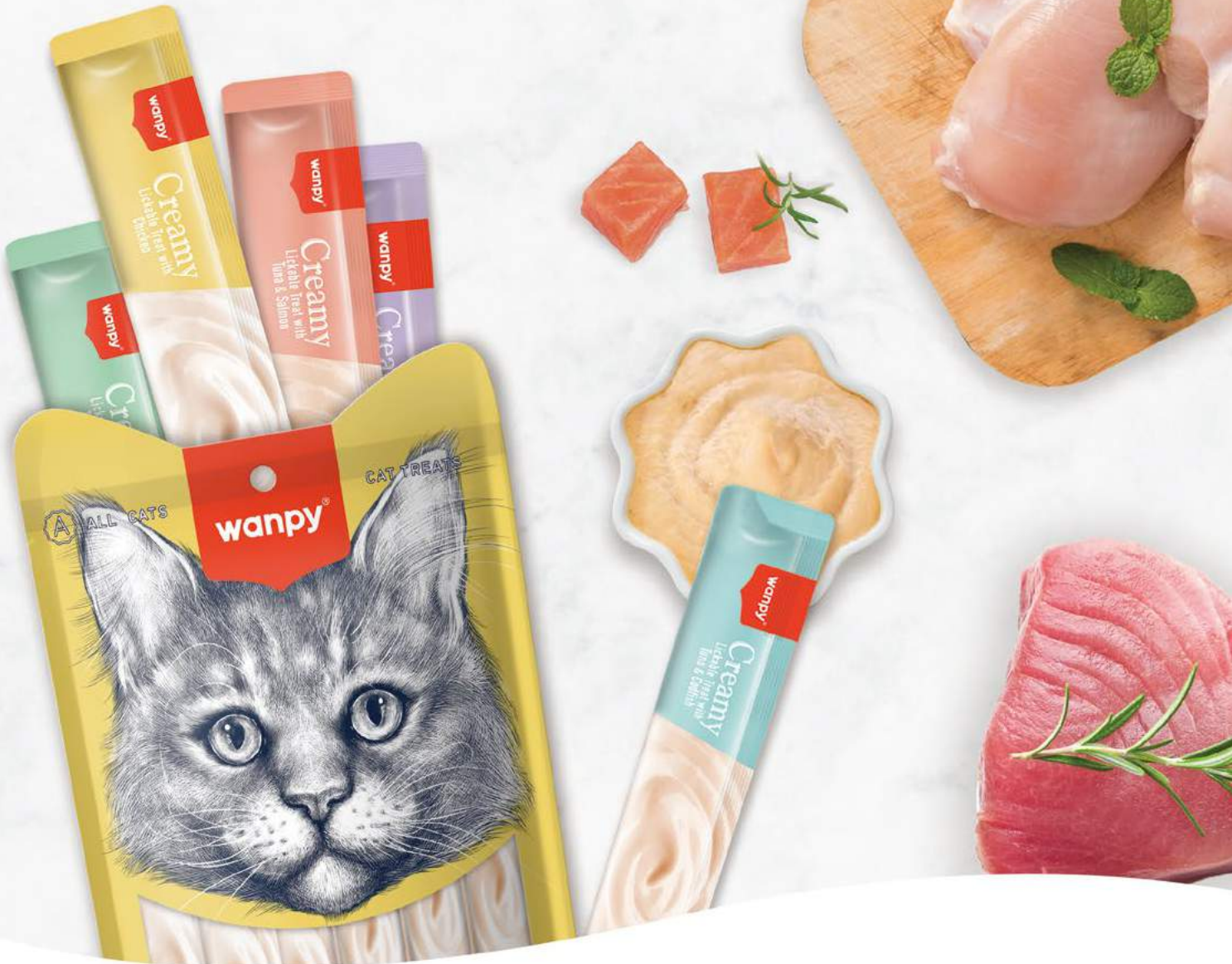


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Opportunities to shape the developing Filipino pet care market

There are plenty of openings for brands to be a part of the development of the sector in the Philippines. But to be successful, it's important to understand the different types of potential consumers and the barriers to overcome.



Mieke Bartholomeus
Director, Worldpanel Division
Kantar Philippines

It probably comes as no surprise that Filipinos are a pet-loving nation, with many households owning multiple pets. This presents early-moving brands with an opportunity to shape the market. However, companies intending to operate in the Philippines should bear in mind that how a pet is perceived and treated in terms of food and care often depends on the socio-economic class of its owner. Understanding the key factors affecting consumer preferences and buying behavior will increase a brand's chance of success in this market.

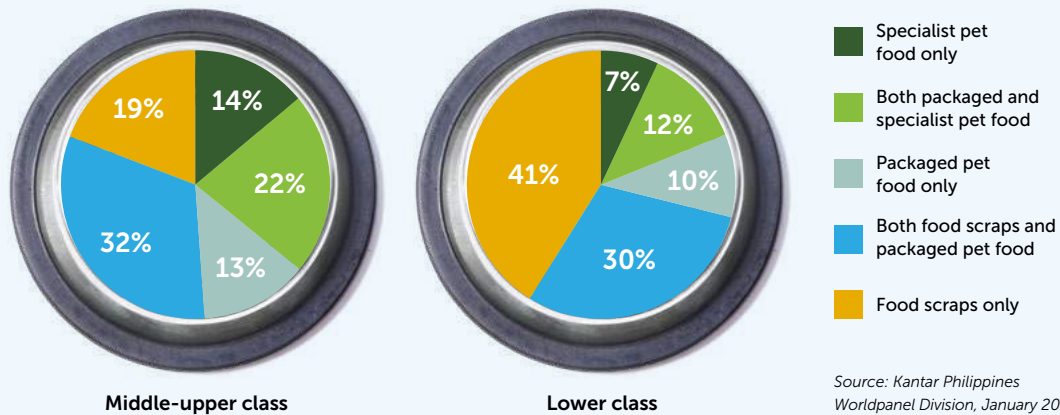
Different roles among different classes

A survey conducted by the Worldpanel Division of Kantar Philippines in January found that 94% of Filipino households own a pet. Dogs are most common, owned by 68% of households, followed by cats (42% of households). In fact, the average number of pet types per Filipino household is 1.4, and these are often multiple types of animals – ranging from dogs and cats to birds, fish, chickens, goats, pigs and rabbits.

But the roles that pets play in people's lives are not the same for everyone. The survey results show that higher socio-economic classes, who typically own a dog or cat, are most likely to view their pet

[▶ SEE NEXT PAGE](#)

What do you feed your pet?



as a family member or companion. As such, the pets tend to stay inside the house, and owners like to spend time cuddling, grooming and playing with them.

While dogs and cats are also the top 2 pet types owned by lower socio-economic classes, this group is more likely to own other types of pets such as chickens, goats and pigs. Only half of them keep their pet inside the house. Although 4 in 10 of these pet owners also view their pet as a family member, they are more likely to keep pets as a guard animal or as a hobby or sport.

Gaining a slice of the pet food pie

The abundance of pets in Filipino families, and the engagement of their owners, creates many opportunities for brands to play a role in the lives of pets and their owners. All pets need to eat, so the most obvious way is in the food space. Kantar's survey found that 1 in 2 pet owners from higher socio-economic classes exclusively feed their pets packaged and/or specialist pet food. Furthermore, 1 in 3 feed their pets a combination of packaged pet food and food scraps, and 1 in 5 feed their pets with food scraps only. This means that even among this group, there is still plenty of room for brands to gain a share of what goes into pets' stomachs.

Outside of pet food, there is a wide range of pet-related products and services for brands to consider entering.

That headroom becomes bigger (but perhaps more challenging to seize) among pet owners from lower socio-economic classes, 41% of whom exclusively feed their pets food scraps. Regardless, getting into those stomachs is lucrative. According to Kantar's Household Panel, the most affluent pet owners spend PHP 791 (\$14.14) on pet food in an average month.

Couple this with the expectation that, in this rapidly developing country, more Filipinos will climb up the socio-economic ladder and gain purchasing power in the coming years, and it becomes easy to picture a booming pet food market in the coming years.

Possibilities in pet care

The market potential does not stop there. Outside of pet food, there is a wide range of pet-related products and services for brands to consider entering. According to Kantar's survey, more than 60% of pet owners from higher socio-economic classes, and almost half of pet owners from lower socio-economic classes, typically use pet care products such as brushes, shampoo and paw balm.

In addition, almost 1 in 5 pet owners in higher socio-economic classes use hygiene or toilet products such as diapers or cat litter. Another 1 in 5 uses toys, and 1 in 10 typically uses a carrier or stroller to transport their pets. Add to that the many services that have opened in and around Metro Manila (the capital region and largest metropolitan area of the Philippines)

Understanding the key factors affecting consumer preferences and buying behavior will increase a brand's chance of success.

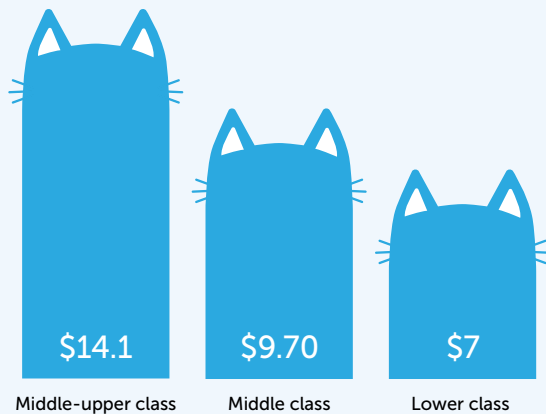
– such as pet grooming salons and spas, dog daycares, pet hotels and pet taxis – and the future of a pet care brand becomes even brighter.

Focus on attracting buyers

Brands that jump in early have an opportunity to shape the market. Kantar's advice for those who do so is to craft a strategy that focuses on attracting buyers. This requires a deep understanding of who its potential consumers are, including their pains and gains, their spending capacity, where and how they shop, and the potential barriers to overcome. Driving strong mental and physical availability, in the right channels, will be critical to reach them. Remembering that in-store shelf space is not unlimited, so carefully selecting a targeted assortment that is visible and stands out among other brands, is key.

Those who can demonstrate that their brand will drive incremental growth for not just their own business, but also the wider pet care category, will have the best chance of getting listed by retail partners. Now is the time to start shaping the future! ♦

Average 4-weekly spend per buyer on pet food



Source: Kantar Philippines Worldpanel Division, Consumer Household Panel, from data up until 3 December 2023

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Pet Fair Asia set to grow even larger in 2024

The leading international pet industry platform in Asia-Pacific, Pet Fair Asia, is expected to hit its historically largest scale to date.

The year of the Dragon in China is about to mark another milestone for Pet Fair Asia: welcoming over 2,500 exhibitors to occupy around 300,000 sq m at the Shanghai New International Exhibition Centre (SNIEC) during its 26th edition.

Since its birth in 1997, Pet Fair Asia has made a significant contribution to the rise of the Chinese pet industry. Today it's the largest exhibition for the pet industry in Asia-Pacific and a world-leading innovation hub.

In 2023, a record number of 101,372 professionals from China and more than 80 other countries visited the event to meet with 2,200 exhibitors and witness the innovations of more than 24,000 brands. Opened to the public in the last 2 days, the show was also visited by 352,169 pet owners and pet lovers.

The event gives significant importance to the Asian markets and proposes a wide coverage of the supply chain and sourcing needs. It is also proof of the consumer power of China's expanding class of well-educated and tech-savvy young generations, which represent the largest and fastest-growing groups of pet owners in the country.

Global trade relations

As China continues to facilitate trade relations with the world, the show expects to welcome a growing number of international visitors in 2024. Citizens from countries such as Germany, France, Italy, Spain, the Netherlands,

Switzerland, Ireland, Belgium, Austria, Luxembourg, Hungary, Thailand, Malaysia and Singapore can now visit China visa-free and the list keeps growing.

The event organizers are also emphasizing the buyer programs, to ensure the platform is helping trade relations in the pet industry between China, Asia, and the world.

Various buyer delegations will be hosted for the event, enabling participants to engage in diverse activities such as guided booth tours, visits to local pet shops and pet hospitals, as well as various networking events.

Particular support will also be provided regarding accommodation, visa processing, getting around the city and more, to ensure an easy and enjoyable trip to Shanghai and a memorable experience at Pet Fair Asia 2024.

To help communication and exchange within the industry, Pet Fair Asia 2024 will also organize various co-located events and conferences, such as the 13th International Pet Industry Summit (IPIS), Pet Fair Asia Veterinary, Asia Pet Food Summit, Asia Pet E-commerce Conference, Pet Shop Asia and Pet Asia Supply Conference. ♦

Register to exhibit or attend now at petfairasia.com

E-commerce trends in the Southeast Asian pet supplies market



Rising pet ownership is creating potential. Although in-store shopping remains dominant, online sales growth is robust throughout the region.



Ismira Lutfia Tisnadibrata
Contributor
PETS International

More and more people in Southeast Asia are choosing to keep pets, especially cats and dogs. And, as pets become beloved family members, pet parents throughout the region are increasingly willing to spend more on pet health and well-being – with e-commerce platforms looking for ways to take advantage of the resulting opportunities.

Buying and selling secondhand

Carousell is a Singapore-based online marketplace launched in 2012 to focus on buying and selling secondhand lifestyle items. The platform is available in 6 Asian markets, including Southeast Asian Malaysia, Indonesia and the Philippines. In recent years, Carousell has observed a rising trend among users who list their unwanted or preloved pet items, ranging from cages and pet beds to like-new dog treats and cat condos. This indicates a strong demand within the pet community for buying and selling secondhand items.

According to Jing Zhi Peh, Head of Goods for Singapore and Malaysia at Carousell, this shift prompted the platform to adopt the pet supplies category, which now ranks within the top 20 categories out of over 30 categories. The company has since introduced sub-categories for pet food, accessories, and health and grooming for dogs, cats, birds, fish, rabbits and hamsters.

Making inroads in Singapore

“Pet accessories emerges as the top sub-category in which our pet owners actively participate in buying and reselling. It seems wasteful to confine sometimes expensive pet accessories to the storeroom. Instead, opting to pass them on to fellow pet owners who can make good use of them becomes a more meaningful and sustainable choice,” Jing tells PETS International.

▶ SEE NEXT PAGE

Pet parents still go to specialty pet shops for offline services like grooming, and they purchase pet care supplies while there.



The most significant traction in the pet supplies category on Carousell's secondhand buy/sell/swap platform is in Singapore and Hong Kong.

Online search trends

According to Jing, cat and dog food are popular, with cat food slightly edging out dog food in rankings, while kibble is the most searched-for type of pet food. Royal Canin, Nurture Pro and Taste of the Wild are among the most popular brands on the platform.

Cat items are among the top search terms in the pet supplies category. "We see an increase in year-on-year searches [2022 vs 2023] with the keyword 'cat' in English and local languages, in Hong Kong, Malaysia, Indonesia, the Philippines and Taiwan. The highest being Indonesia with over 30% increase and Malaysia with over 20% increase," adds Jing. The dominant popularity of cat items such as food, cages or condos in Singapore and the Philippines is particularly striking because there are more pet dogs than cats in those two countries. The dog ownership rate in the Philippines reaches 67%, the highest in Southeast Asia, according to Rakuten Insight.

Potential in Indonesia

Indonesia is one example of a high-potential market in the region. According to the TGM Global Pet Care Survey 2023, 71% of people in Indonesia own pets and 61% of them own at least two pets. Cats are the most popular choice of pet among this Muslim-majority population.

This is echoed by Singaporean Clarice Zhang, founder and owner of PT WAW Indo Utama, a Jakarta-based premium cat and dog food distributor. The company witnessed significant growth soon after its establishment in 2019. The COVID-19 pandemic, during which more people adopted pets or paid closer attention to caring for their existing pets, served as a boon for the business. Initially supplying to only a few pet stores, it now distributes to 70 online and offline pet retailers in 19 cities across Indonesia. This includes 17 outlets of the Chinese multi-brand retailer chain KKV, all of them with a pet section.

"The pet industry in Indonesia has tremendous potential. It is not as sophisticated as Singapore yet. There is a growing market among well-to-do pet owners, mostly located in 7 major cities – including Jakarta and Bali," she tells PETS International. According to Zhang, low-cost pet food and pet products are also doing well, depending on the demographics in Indonesia.

Online and offline strategies

The firm plans to expand by acquiring more international brands in its distribution list, following the success of its marketing strategy, which involves engaging influencers and organizing offline events. The company is even considering creating its own brand. "We act like we are [marketing] our own brand. So, it's either I take on more brands, or I do hear that there are distributors starting to create their own brands as well," Zhang adds.

In recent years, Carousell has observed a rising trend among users who list their unwanted or preloved pet items.

Despite the robust sales growth of pet items on online marketplaces, in-store shopping is still where most pet owners spend their money. Zhang notes that maintaining both an offline and online presence is crucial in Indonesia, where "almost everybody" has Tokopedia or Shopee accounts. Despite this, pet parents still go to specialty pet shops for offline services like grooming, and they purchase pet care supplies while there.

The dog ownership rate in the Philippines reaches 67%, the highest in Southeast Asia.

Home-prepared pet food

Both Jing and Zhang identify home-cooked or home-prepared pet food as a trend. "I am starting to see more and more pet owners becoming conscious of their pets' health," points out Zhang. She adds that providing pets with healthy, freshly prepared, home-cooked or raw food rather than just feeding them regular canned or dried pet food is a trend that is picking up in Indonesia.

This trend is also visible among Carousell's customers. "This could suggest that modern pet owners are even more particular about their pets' nutrition, and we could see more variety of pet food soon to cater to our nutrition-savvy pet owners," concludes Jing.



The total gross merchandise volume (GMV) on 9 leading e-commerce platforms in Southeast Asia – Shopee, Lazada, Tokopedia, Bukalapak, TikTok Shop, BliBli, Tiki, Amazon and Sendo – reached \$99.5 billion (€92.1B) in 2022. According to an e-commerce report by insights research firm Momentum Works, Indonesia contributed 52% to Southeast Asia's GMV. ♦



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Seafood ingredients and the impact of fish shortages

Algal oil could make its way into more pet food formulations as manufacturers look for ways to protect themselves against volatile fish oil prices.



Emma Penrod
Contributor
PETS International

Concerns about both the supply and sustainability of traditional fish oils are leading manufacturers to explore other avenues. As demand for fish oil continues to grow in the pet food market, algal oil may become a viable alternative – despite also commanding a high price.

Global shortage

Fish oil prices spiked in 2023 as a result of the cancellation of the April-July fishing season off the coast of Peru, which has triggered a shortage of fishmeal, fish oil and related marine ingredients.

The cancellation was not necessarily unexpected, as the catch in the country is typically limited during El Niño, a natural climate phenomenon that involves warmer surface temperatures in the waters of the Pacific Ocean. Enrico Bachis, Director of Market

Research at the Marine Ingredients Organization (IFFO), says that the warmer temperatures cause anchovies to move into deeper waters in search of food, which in turn limits the size of the catch in Peru and along other parts of the South American coastline.

As of mid-January, IFFO reported that fishmeal production during the first 11 months of 2023 was down by 16% compared with the same period in 2022, with decreased fishing in Peru accounting for 41% of the total decline. Fish oil production fell almost 20% in the same period.

The pet food industry is somewhat insulated from these global dynamics because most pet formulators prefer salmon meal and salmon oil, which is typically made from filet processing byproducts, to meals and oils of marine origin. But, according to Bachis, demand from the pet food market for fish oil continues to grow, while the supply of salmon meal and oil remains relatively finite.

In addition to the reduced catch, fishers around the world have found that fish contain less oil than in the past.

"We expect inclusion levels to be adjusted to have enough fishmeal and fish oil to accommodate growing pet food production," he says. "The overall consumption of marine ingredients by the pet food sector however could still grow depending on the willingness of pet owners to pay for the best quality feed for their animals."

Sustainability and quality

The sustainability of these marine ingredients is also in question – and not just in terms of the environmental impact. Research published last June in the journal Nature Sustainability estimated that environmental challenges, including climate change, threaten 90% of the world's marine food production.

There's also the matter of the quality of these ingredients. In addition to the reduced catch, fishers around the world have found that fish contain less oil than in the past, according to George Josef, Global Head of Marketing and Nutritional Lipids at DSM-Firmenich, the global distributor for Veramaris algal oil. Wild-caught marine ingredients may also contain contaminants such as heavy metals.

Widening the ingredient net

Pet food manufacturers have turned to ingredient diversification as a strategy to cope with growing demand for fish oil and concern about supply stability. Algal oil, which comes from specific species of algae that are grown commercially in industrial vats, offers one such strategy.

Aquaculture still represents the majority of Veramaris algal oil sales, but the company began marketing to the pet food sector in 2021 in the belief that the oil's nutritional profile could make it a desired ingredient in the pet market. Cats and dogs need adequate levels of certain omega-3 fatty acids in their diet, including eicosapentaenoic acid (EPA) and docosahexaenoic acid (DHA), and Josef says that there is simply not enough marine oil available to supply global demand.

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Production of fishmeal and fish oil (in million metric tons)

5.19 2020

5.32 2021

5.35 2022

5 2023 (forecast)

Fishmeal

1.26 2020

1.28 2021

1.24 2022

1.2 2023 (forecast)

Fish oil

Source: IFFO

Josef says that is going to be a “big market”. “Today, we already have global companies on the super-premium market using our oil, so this is not something we are looking to in the future, this is something we are looking to in the present,” he says.

Alternative to fish oil

Glenn Gorham, owner of Californian pet food manufacturer The Real Meat Company, says that the business has added algal oil to all its dog and cat food formulations since the oil was approved in the US to boost its products' omega-3 content.

However, The Real Meat Company hasn't increased its use of algal oil in response to rising fish oil prices, Gorham says, although it has ruled out making an all-fish diet on account of cost. Given the steep increase in the cost of raw materials – and the fact that algal oil is by no means a cost-saving ingredient – Gorham says that the company has opted to raise its own prices rather than change its formulations.

According to DSM-Firmenich's Josef, this is to be expected as strict labeling requirements mean pet food manufacturers are typically slow to change their formulations. The majority of pet food manufacturers are still in the process of incorporating algal oil into their pet diets, and most pet products containing algal oil have yet to hit the shelves.

Future formulas

Josef is a believer in the strategic advantages of algal oil. Concerns about fish oil availability and price volatility, he says, mean pet food companies will likely use algal oil in combination with fish oil as a hedge against price shocks.

The IFFO's Bachis points out that supplies of algal oil remain somewhat limited and global production of algal oil still totals less than 100,000 metric tons. In 2022, the global pet food industry consumed between 100,000 and 150,000 metric tons of fish oil. “Market forces ration the available and finite supply of fishmeal and fish oil, meaning that the market segment that can afford to pay the highest price will get the needed marine ingredients,” he explains.

The pet food sector so far has shown it has this ability, increasing year after year the amount of fishmeal and fish oil used. In the short to medium term, “we expect this not to change”, concludes Bachis. ♦





Green-lipped mussel: harnessing the power of marine ingredients

This popular nutritional component has been gaining traction in the pet supplement arena due to a belief in its anti-inflammatory properties.



Sarah-Jane Molier
Veterinary Surgeon

As the focus shifts to a more holistic approach to pet care, the demand for high-value bioactive nutritional products is increasing. Is green-lipped mussel a contender for such multimodal therapy?

A short history

The green-lipped mussel (*Perna canaliculus*) is named after the green edges, or 'lips', to its shell and is indigenous to coastal New Zealand.

The health benefits of green-lipped mussels (GLM) have been studied since the 1970s, around the time commercial farming of GLM began. This interest was seemingly peaked by the observation that the indigenous Māori people of New Zealand (who have been eating green-lipped mussels for centuries) had a lower incidence of arthritis when compared with the people inhabiting inland communities.

Health benefits

GLM is currently used in some joint health supplements, due to its proposed effects on inflammation and cartilage repair.

Anti-inflammatory

Green-lipped mussel is high in certain omega-3 fatty acids that have anti-inflammatory properties, including eicosapentaenoic acid (EPA) and docosahexaenoic acid (DHA). Multiple studies have proven that these fatty acids offer a degree of protection against inflammation, osteoarthritis and cardiovascular disease in humans by modulating cellular signaling pathways. EPA and DHA are structurally similar to arachidonic acid and so can effectively compete as a substrate for enzymes in the pain pathway.

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Some studies have shown that incorporating GLM into a complete diet can relieve some symptoms of arthritis in dogs.



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While oily fish also provides an excellent source of EPA and DHA, the omega-3 fatty acid eicosatetraenoic acid (ETA) is unique to GLMs, as is the nutrient profile. ETA is reported to possess stronger anti-inflammatory effects than other omega-3 fatty acids, although more research is needed here. Other important nutrients found in GLM include vitamins and minerals with antioxidant properties, such as vitamin C, zinc, magnesium, copper and selenium.

A review led by researchers at the Cawthron Institute in New Zealand showed that the vast majority of studies on dogs provide evidence that the addition of GLM extract to the diet can alleviate some of the symptoms of osteoarthritis. Some studies showed improvement in mobility after only 4 to 6 weeks of GLM supplementation. While this is certainly promising, it's important to bear in mind that there is much variation in study design as well as the type of GLM extract used, and the results often rely on subjective assessment.

Heat processing can destroy the bioactivity of GLM, so careful processing techniques are required. A study published in 2013 in the Canadian Journal of Veterinary Research showed that low-temperature processed GLM powder was effective in reducing arthritic signs in dogs when incorporated into main diet or processed treats.

Chondroprotective

Green-lipped mussel also contains glycosaminoglycans, which form part of the building blocks of cartilage. It has been hypothesized that glycosaminoglycans may help to stimulate the production of cartilage matrix and inhibit the activity of enzymes that degrade cartilage. Some studies exploring this theory have shown that incorporating GLM into a complete diet can relieve some symptoms of arthritis in dogs.

Any side effects?

GLM is generally considered safe and there are no known side effects. However, as with all nutritional products, it's important to consider the source and the quality. Mussels can be contaminated with heavy metals, pesticides and organic pollutants, for example.

Sustainability profile

Shellfish farming is considered one of the most sustainable forms of aquaculture. One study in a report

GLM may reduce the need for conventional medication and may even offer a gastro-protective effect.

from Aquaculture New Zealand showed that shellfish farming has a lower carbon footprint (per 100g of protein) than all other animal protein sources in New Zealand. Naturally, processing comes at an additional environmental burden, with drying of marine products and extraction of lipid fractions adding environmental and carbon costs.

Practicalities: addition to pet food

There's a strong body of evidence for the benefits of adding GLM to the diet of dogs with osteoarthritis. The nutrients present in GLM may work synergistically to reduce inflammation and further cartilage damage, while supporting regeneration of cartilage and synovial fluid.

Furthermore, the evidence is promising, and continually mounting, for the more widespread benefits of omega-3 fatty acids – and GLMs offer an excellent source of these. While the evidence is currently limited for the benefits of the other nutrients, the wide safety margin makes GLM an excellent choice of nutraceutical.

Reducing reliance on medication

While studies on GLM products have mostly been promising, they don't show the same efficacy as non-steroidal anti-inflammatory drugs. However, they may reduce the need for conventional medication and may even offer a gastro-protective effect, making them ideal for use alongside conventional medication. In fact, a great number of dog owners are already feeding their dogs joint supplements containing GLM, indicating that diets already enriched with GLM could prove very popular and convenient.

Given the source, harvest method, manufacturing process and dose of GLM could all affect the concentration of key bioactive compounds, more randomized, controlled and non-subjective clinical trials are needed in pets. This could serve to further prove the benefits of GLM and determine optimum formulation and dosing. ◆

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Making veterinary care more accessible

There's a lot going on in the veterinary sector and key concepts are more convenience, less stress, time-saving strategies, cost-effectiveness and new technology.



Muskaan Gupta
Associate News Editor
GlobalPETS

In different parts of the world, both the private and public sectors are working to make veterinary care more easily available for all pet parents. A combination of new laws and new technology, including artificial intelligence (AI), is at the heart of many new veterinary services: mobile vets bringing pet healthcare to people's homes; online consultations that save time for provider and consumer; and opportunities for other veterinary clinic staff to provide pet care to help counter vet shortages.

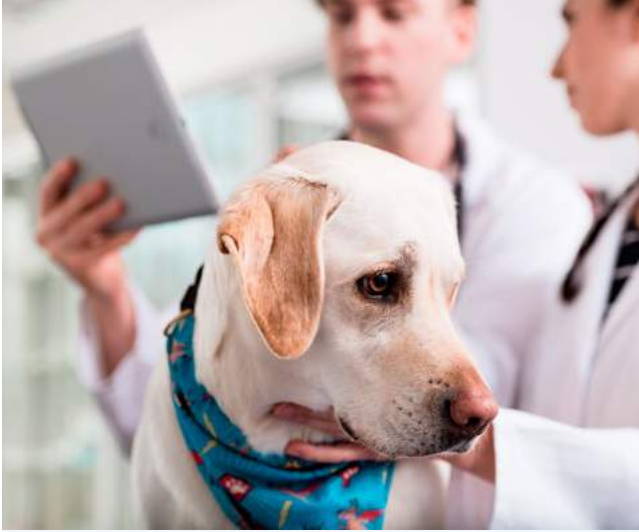
The mobile vet model

UK-based WW Mobile Veterinary Services has strategically adopted a mobile model to offer cost-competitive consultations, tests, medicines and surgery, gaining a competitive edge by eliminating corporate and high staff overheads. The company operates within a 40-mile radius of the port city of Southampton.

Boston-based start-up BetterVet has entered into a partnership with pet healthcare membership provider United Pet Care to provide mobile veterinary care services for employees through company packages in the US.

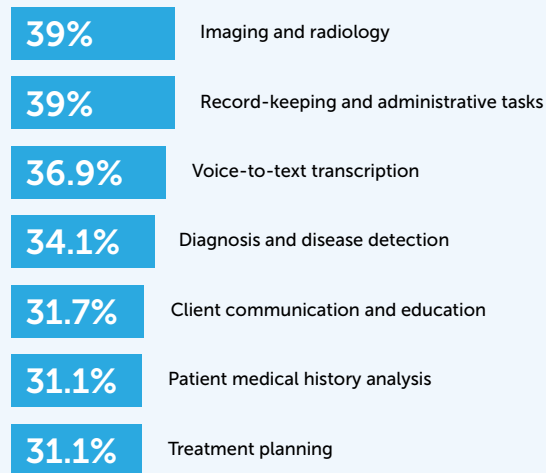
Mobile services are also becoming popular in the Middle East. Modern Vet, a veterinary hospital in the United Arab Emirates, is collaborating with Lebanon-based Vetlivery to launch its first mobile clinic, recognizing the escalating demand for convenient pet healthcare solutions. "Pet owners seek hassle-free options that cater to their busy lifestyles and prioritize their pet's well-being. This rising demand is fueled by a growing awareness of pet health and wellness," says Maria Al Mouallem, founder of Vetlivery. [▶ SEE NEXT PAGE](#)

The difficulty for investors currently is that different regions have different telemedicine regulations.



AI tools used in vet clinics

(US)



Source: Digital/American Animal Hospital Association, 2024 survey of 3,968 vets

Non-profit care

Non-profit organization the Banfield Foundation last year unveiled plans to donate 6 mobile veterinary units across the US. Concurrently, Sacramento County launched a pioneering mobile service called PAWS Clinic at the end of 2023. This is specifically designed for pets of unhoused residents. "Our mobile veterinary clinic removes the barriers of cost and transportation. We can meet people where they are and provide free spay/neuter and wellness services," says Luna Anona, Public Information Officer for Sacramento County Animal Care Services.

Addressing vet shortages

The shortage of veterinarians makes recruitment of licensed professionals complicated and this hinders the widespread practice of mobile delivery.

Traditional bricks-and-mortar practices often don't actively promote mobile services due to constraints on client volume, according to Mark Cushing, co-founder of the Veterinary Virtual Care Association (VVCA). Talking about his expectations for this year, he says: "Mobile care is expected to grow due to its convenience factor for pet owners, especially if the mobile veterinary provider offers – or is linked to – a telemedicine service."

States legislate for telemedicine

A new law to redefine the veterinarian-client-patient relationship (VCPR) entered into force in California in January. This regulation allows pet parents to access diagnoses and prescriptions for their pets through video consultations. Arizona also approved a veterinary telemedicine law last year, allowing pet owners to access telemedicine services after licensed veterinarians have established a VCPR.

The regulatory shift has sparked expansions and increased investment in the sector. Shortly after the law came into force, pet telehealth service provider Airvet became the first company to offer VCPR-compliant telemedicine in California. And Canadian-based telemedicine marketplace Vetster, with a presence across the US, Canada and the UK, recently announced that it too is expanding its services in California, providing online diagnostics and prescriptions.

Next up... Florida and Colorado

The Colorado General Assembly is in the process of approving a new bill that aims to increase access to veterinary care for people in rural and underserved communities. The proposal would allow veterinary technicians and specialists to perform tasks of care (including dental procedures and surgical tasks) under the supervision of licensed veterinarians, after the VCPR has been established with the patient.

Meanwhile, the Providing Equity in Telehealth Services (PETS) Act will soon enable veterinarians in Florida to supplement their practice using virtual technology to treat pets after establishing VCPR. From July 2024, vets will be allowed to virtually assess and diagnose pets during consultations, as well as prescribe certain medicines online.

What do investors want?

As innovations become more sophisticated, the industry is witnessing increased investment, with venture capital and private equity flowing into the sector. "We're looking at companies that have real staying power in existing markets so that they can enter new markets productively," says Scott Maloney, Senior Partner at US consulting firm Crain & Company.

He explains that investors are seeking start-ups that are developing AI for pain recognition or home diagnostics, rather than bigger players, which have been very slow to adopt new tactics. But the difficulty for investors currently is that different regions have different telemedicine regulations. "We are seeing big companies who enter the telemedicine space having a really hard time bringing all those environments together, and subsequently collapsing under their own weight," he adds.

Innovative future for digital care

Industry experts are overwhelmingly keen on the rise

of telemedicine this year. While some call it the 'second surge', and others chart out the benefits of cost and convenience, it is largely understood that the sector will rise to prominence in 2024.

Mark Cushing from VVCA believes that this new reality will be "coupled" in the US with alternative service delivery models to improve access to care for low to middle income households.

Maloney anticipates that there will be a "significant uptick" in technological surveys linked to virtual care, including record databases and patient portals that allow pet parents to interact. "There's a whole new generation of technology companies emerging that aim to own that patient journey through a digital and physical environment," he explains.

Experts agree that telemedicine in vet care will continue to develop in the medium and long term, with new players presenting fresh solutions to cater to the increasing demands of pet parents. ♦



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Consolidation meets regulation in the veterinary clinics market

As animal health becomes big business in Europe and the US, regulators are taking a closer interest in the consolidation activity taking place, with the ramifications beginning to be felt across investment and M&A in the sector.



Matthew Lee
Managing Director
Lincoln International

While the global veterinary market is an attractive one, regulatory developments and challenging financial markets mean investors and operators have to adapt to ensure they prosper.

UK regulators move in

As the animal health business grows, the corporatization of the veterinary market through mergers and acquisitions (M&A) has become a discussion point over the past decade and is something that is increasingly catching the attention of regulators as markets consolidate in the hands of a few.

Regulation is now playing a growing role in the global veterinary market and influencing M&A, especially in Europe – most prominently in the UK and France. The US market is not immune either, with the Federal Trade Commission (FTC) imposing restrictions on the activities of Mars and JAB especially.

In the UK, the Competitions and Markets Authority (CMA) announced a 'market review' in early September 2023, which in March this year developed into a full-blown Market Investigation. As a forerunner to this, the CMA unpicked a number of historic transactions by consolidators, including veterinary services providers Medivet and IVC Evidensia, which ultimately led to the disposal of practices by them.

Every cloud has a silver lining, however, as some of these deals resulted in new entrants into the market; most notably PE firm Perwyn acquiring 10 practices and launching the brand Kin Vet Community. The Market Investigation may lead to further sector disposals or other remedies and concern over the outcome of the review led public markets investors to react negatively, with CVS Group Plc declining around 30% on the day of the CMA's announcement. [▶ SEE NEXT PAGE](#)

Regulation is now playing a growing role in the global veterinary market and influencing M&A, especially in Europe.

The French perspective

In France, the Ordre National des Vétérinaires (ONV) is resisting the entry of large foreign companies into the domestic veterinary services market. The ONV has argued that these companies do not comply with the rules of the profession and threaten the independence of veterinarians.

The Conseil d'État, the highest administrative court in France, ruled in favor of the ONV in July 2023 and decided that the ONV can refuse to register a veterinary company if its statutes or agreements are not in line with the law or the profession's ethical standards. Some veterinary corporates are having to reconsider both their legal holding structures and appetite for M&A in France while the new guidance becomes clear.

Furthermore, 2 major private equity deals have been pulled in France as a direct result of this development. While some pause, others who conform to the structuring rules are pressing on – the veterinary clinic network Mon Vêto is acquiring at a rapid pace with the financial support of Paris-based investor firm Ardian.

Other markets where consolidation is less progressed haven't attracted regulatory scrutiny and have remained active, such as Belgium with recent deals for veterinary networks Nesto and BeVet. In Italy, veterinary care player BluVet attempted to find a new owner in late 2023 but put its process on pause after lack of interest because of deal dynamics and elevated price expectations.

The entrance of new PE backers is positive for the sector as it broadens the owner base and future buyers for other smaller platforms.

As of March, veterinary clinic provider Animalia was moving into the final phases of securing a minority investor, albeit the process narrowed quickly to include only the most committed who are willing to 'look the other way' on a highly adjusted selling EBITDA and a complex deal structure.

Unavets, which claims to be one of the largest veterinary health groups in the Iberian Peninsula, kicked off its process to find a new financial sponsors backer in February and has received strong initial interest with several PE firms stepping up their pursuit ahead of March's bid deadline.

Appetite is positive given a strong management team, integrated platform and broad ecosystem of operations expanding the addressable market. A key question for investors in the European markets will be whether domestic competition regulators will take note of the UK's CMA work as their more fragmented markets start to rapidly consolidate too.

Private equity comeback

One thing that has come out of the recent developments in Europe is the return to form of private equity over trade – perhaps a reflection of a moderation of valuation in the current high-interest environment and lesser competition from trade as balance sheets are repaired after years of aggressive deal making.

The entrance of new PE backers is positive for the sector as it broadens the owner base and future buyers for other smaller platforms, while ultimately reaffirming the strong animal health investment thesis.

Developments in the US

In the US market, M&A activity has slowed notably as interest rates bite on highly levered businesses, and investors seek proof that these businesses are more than just Pac-Man acquirers of assets.

The high valuations of the past are leading to investors waiting until valuations rebound. In recent months,



data from the American Veterinary Medical Association (AVMA) has highlighted declining visit numbers across its members as the COVID bubble sees the puppy/kitten cohort move into adulthood, with less veterinary input required. Investors are now focusing on operational excellence and organic like-for-like growth programs to counter declining volumes.

Coping with challenges

In recent years, with a more challenging M&A environment, a notable trend has seen investors increasingly looking to enter the sector by investing in or acquiring brand-new hospitals in prime locations. Vet services start-up Bond Vet is an example of such a model that Lincoln International supported. This allows for fresh branding of a single name in an environment that feels sufficiently high caliber for the pet owner's furry friend, which is beneficial for marketing as well as attracting and retaining customers and staffing.

Marketing a single-branded hospital chain is seen as easier as the message is consistent across locations and allows for increased awareness, attracting a larger customer base and supporting growth objectives. Additionally, it is more efficient to move customers as well as staff to different locations since all the medical information is saved in one system and removes a potential delay in transferring records that could impact care, allowing support for different staffing models based on objectives and talent needs. ♦

The European veterinary clinics market is estimated to be worth over €20.2 billion (\$22.1B) and growing at 7 to 8% according to L.E.K. Consulting, with the drivers well understood: the humanization of pet care; a growing post-COVID population of cats and dogs; an aging pet cohort; and technological advances in care and treatment.

In comparison, the US market is valued at \$21 billion (€19.2B) and growing at 6.3% yearly, according to Market Research 365.

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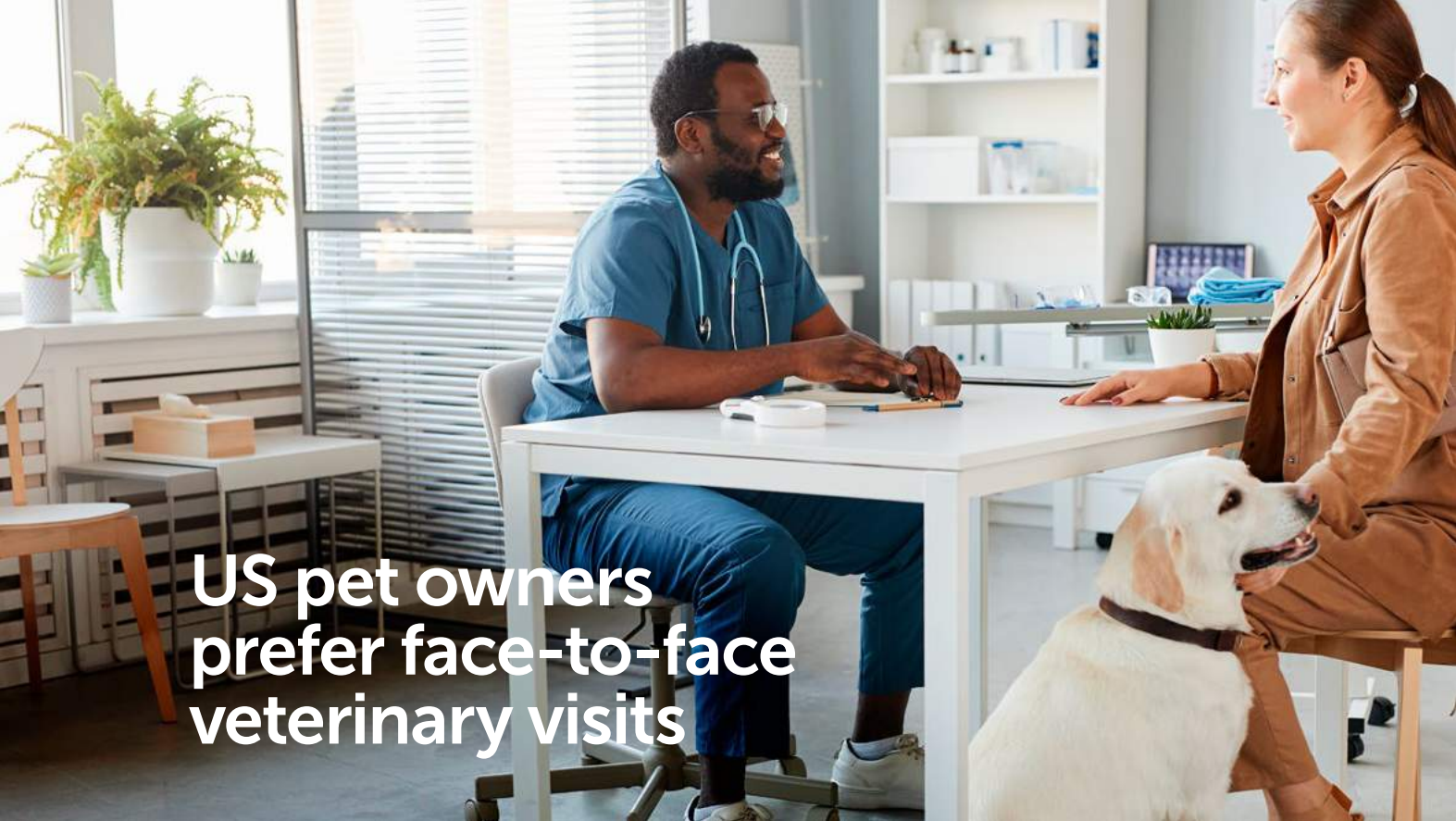
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US pet owners prefer face-to-face veterinary visits

Despite the increased accessibility of new technologies, recent research shows in-person veterinarian interactions are still the first choice for most pet owners.



Dr. Rena Carlson
President - American Veterinary Medical Association (AVMA)

The disruptions and behaviors caused by the COVID-19 pandemic don't seem to have changed most pet owners' preferences when it comes to seeking the services of a veterinarian. Higher quality service and honest feedback are among the reasons owners cite for preferring to take their pets to a veterinary clinic rather than using online resources.

Hands-on care

A survey by the American Veterinary Medical Association (AVMA) of 1,000 pet owners concluded that 88% of respondents believe that having a veterinarian physically examine their pet and talk to them in person about their pet's health needs leads to the best care.

Additionally, more than 72% of pet owners said they prefer to meet a veterinarian in person to establish

a relationship before allowing them to care for their pet virtually.

Health and safety first

Pet owners prioritize health and safety for their pets when choosing veterinary care, and they also believe that in-person visits and physical examinations are key to providing quality care for pets.

According to the AVMA's research, 76% of owners in the US put their pet's health and safety above all else. Nearly 8 out of 10 pet owners indicated that they prefer a veterinarian to oversee their pet's care, and believed it would be dangerous for anyone other than a licensed veterinarian to make recommendations about life-or-death decisions for their animals.

Urban pet owners are more open to using telemedicine than those in suburban or rural areas.

Waiting times

While the pandemic resulted in longer appointment wait times, pet owners now overwhelmingly said they had not had an issue getting a timely appointment for their pet.

The survey concluded that 76% of respondents had to wait less than a week for a non-emergency appointment and 60% had to wait between 1 and 3 days.

Of those whose pets needed emergency care, 78% received help in 2 hours or less. This puts the profession closer to pre-pandemic wait time levels and is consistent with data gathered from other recent AVMA consumer surveys.

Demographic differences

Breaking the data down by demographics, urban pet owners have more experience with – and are more open to – using telemedicine than those in suburban or rural areas. Residents in rural areas and cat owners, specifically, are less enthusiastic about telemedicine. One reason is that those in rural areas often have more difficulty accessing reliable internet. While some argue that telemedicine is the answer to rural access to care, it seems residents in these areas are less receptive to telemedicine than urban pet owners. In addition, pets in rural locations often already receive less care,

More than 72% of owners said they prefer to meet a veterinarian in person to establish a relationship before allowing them to care for their pet virtually.

increasing the likelihood of health issues that have not been addressed and making a physical examination even more important.

Providing peace of mind

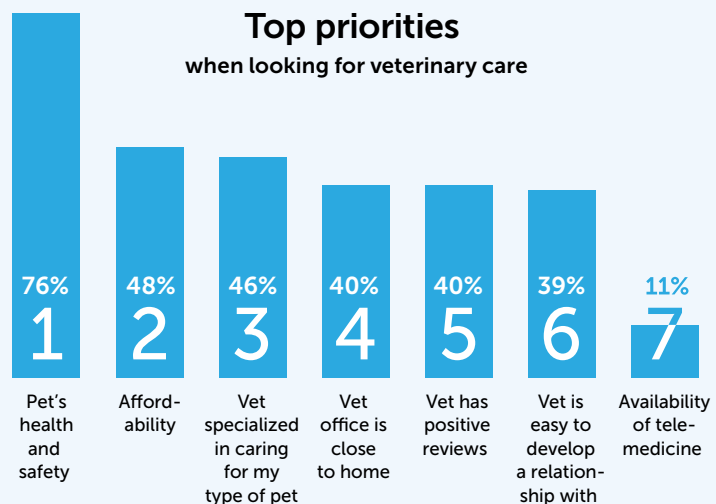
The survey's results reveal that pet owners want to be confident that their animal companions receive the best care. This is a significant factor in their choice of a veterinarian-led care team.

In addition, animal owners prefer using telemedicine services with a veterinarian who already knows their animal and has established a relationship with them in person. These results mirror the AVMA's ongoing efforts to champion the use of telemedicine after an in-person visit has been established.

The AVMA, the leading advocate for veterinary medicine in the US, representing more than 105,000 members, shares the desire and need for pet owners' peace of mind when seeking quality care for pets and animals. ♦



Top priorities when looking for veterinary care



Source: AVMA, 2023 pet owner attitude survey



Driving growth with in-store services

The shape of the pet retailing ecosystem is changing. As online channels take an ever-bigger share of the market, traditional retailers are increasing their interaction with customers as a strategy for propelling growth.



David Palacios
Head of Editorial
PETS International

Services have become an essential element of today's offering for nearly all bricks-and-mortar retailers. Buoyed by trends such as the increasing pet population and shifts in consumer behavior, pet retailers are updating their strategy to offer added-value propositions for their customers. While retaining popular existing services such as veterinary care or grooming services, they are also venturing into new ones.

A large chunk of revenue

In 2023, 32.5% of consumer revenue for British pet retailer Pets at Home came from services. The group describes the ability to offer consumers pet care

services in addition to pet products as a "key competitive differentiator". "Generating sales from services is an essential part of being a pet care business and not solely a retailer," says a company representative.

In the 6 months to October 2023, the pet giant's vet business accounted for £311.7 million (€364.1M/\$393.4M) of the total sales. This was 17% more than in the same period of 2022, whereas retail sales increased by 5.2%.

American pet retailer Petco has a similarly strong focus on services. The category hit sales of \$981.5 million (€905.9M) in the 12 months to February 2024, an increase of 21.9% in comparison with the previous year. Services represented an important driver of the company's performance in 2023 and they forecast this trend to continue this year.

Offering in-store services is a golden opportunity to incentivize some additional spending.

For Spanish pet retailer IskayPet, in-store services currently account for 3% of the total revenue. However, the company plans to invest more in consolidating this part of the business over the coming years. Around half of the retailer's store network offers grooming services right now, but this is set to change. "In 3 or 4 years' time, we should have 80% of our stores with a grooming area," CEO Marcos Ruão tells PETS International.

More services equal more spending

Offering in-store services is a golden opportunity to incentivize some additional spending. "Sometimes convenience is a winner. And getting your customers to stay in the store is the best thing," points out Retail Analyst Bruce Winder.

"When people need to leave their pet with a groomer or with the vet for a while and there's a lot in the store that's attractive, then logically they will spend something during that visit," adds Bart Scheffer, Chief Operating Officer at Dutch pet retailer Pets Place.

"Roughly 14% of customers use services and also buy products, but they account for 25% of the total revenue," states IskayPet's Ruão. Meanwhile, at Pets at Home, clients who engage across all its channels spend up to 9 times more each year compared with pet parents who shop solely in-store.

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According to Lauren DeVestern, Managing Director and Partner at L.E.K. Consulting, bringing in the younger generation with in-store service concepts is good for “future longevity”. It also helps to encourage in-store spending among those who are more used to buying online, she says.

Expanding the range

While grooming and vet care remain the most popular services, retailers have increasingly started to expand their range of services. For example, Pets Place recently added insurance to its in-store service portfolio. Scheffer believes it’s good to offer this option in-store as well as through the website, as it fits with some customers’ preferences “to come in and communicate with a real person and ask questions rather than doing it online”.

IskayPet also recently rolled out its pet insurance product in-store, although it was a “complex process”, according to Ruão. “We negotiated with insurance companies for more than a year to have this product,” he admits. It is estimated that just 1% of pets are insured in Spain, but the retailer aims to triple the market penetration. Similarly, German pet retailer Fressnapf rolled out its pet health insurance across 800 locations last year.

Pet Lovers Centre is another retailer that has recently ventured into the pet insurance sector, making a product available across its locations in Southeast Asia. The Singapore-based company has also established a joint venture with a pet crematorium in a bid to offer services “from the cradle to the grave”. “We take care of your pet from insurance, food and toys, to providing vets for your pet in case of sickness. And when your dog dies, we cremate it for you,” says CEO David Ng Whye Tye to PETS International.

Ambitious thinking

Some retailers are seeing a big opportunity in converting some of their shops – especially those that have a bigger footprint – into seamless ‘service destinations’ for owners and their furry friends.

Service concepts help to encourage in-store spending among those who are more used to buying online.



One of the most recent examples can be found in the Middle East, where in February UAE-based The Pet Shop launched a new 20,000 sq ft pet daycare and boarding facility in Dubai. The location is part of a 50,000 sq ft pet store, the largest one in the Middle East, which has been developed as an “ultra-luxury” Greek-themed center. It features the country’s first pet spa, chlorine-free outdoor pools, a ‘pet hotel’ with 100 boarding rooms, indoor and outdoor play areas, and dry fountains.

Similarly, Irish pet retailer Petmania recently opened a one-stop health-and-wellness destination in the central Irish town of Athlone for pets and their owners, including a state-of-the-art grooming studio and a custom-built dog training school.

“Our dog training courses are now operating a waiting list, which signals the quality of the classes we provide and the growing demand for dog training services,” says Shane O’Keeffe, Managing Director at Petmania operator O’Keeffe Group, in a conversation with PETS International.

Big retail corporations have also realized that pet services present a good business opportunity. In 2023, Walmart opened its first pet services center in Georgia. This was aimed at increasing its market presence in the space, and is also seen as a first step to a possible future expansion to other territories. In a similar move, American pet retailer Chewy launched its first veterinary practice in South Florida in January this year, and plans to open between 4 and 8 more over the next 12 months. Without a doubt, the ever-evolving field of pet services warrants close monitoring. ♦



Industry leaders tackle AI, healthy eating and sustainability at GlobalPETS Forum in Venice

More than 300 pet industry experts assembled at this year's event to share knowledge, experience and insights on how businesses can respond to issues including technological advances and shifts in pet owners' priorities.



Michela Fantozzi
Contributor
PETS International

These are challenging times, with consumers changing their purchasing patterns and behavior. But the pet sector is showing its resilience by making sure it is adapting to customer needs without losing sight of key areas such as sustainability, technology and innovation.

Adopting new technology

The technological part of the event mostly focused on artificial intelligence (AI) and how pet businesses can take advantage of this revolutionary technology.

Technology and innovation expert Deborah Nas told GlobalPETS Forum (GPF) attendees that pet firms must adopt AI to stay competitive. "We are on the verge of a new era. In all the time that I've been working in innovation, I have not seen anything with this disruptive potential," she said during her presentation.

According to Nas, who is also a professor at the Delft University of Technology, it is essential to overcome fear, passivity and skepticism. And this means that businesses need to leverage technology to improve and enrich the consumer's experience.

AI can enhance the pet industry by improving chatbots, marketing content, data collection and product personalization. "If we look at the tools out there, all based on ChatGPT, we see nutrition advisors and breed 'explorers' giving you all the information you need – just based on a picture of an animal – training tips, mood analyzers, the emotional state of your pet, answering a series of questions. Virtual veterinarians too," she said.



A need for more data

It's not just about AI. Businesses must embrace digital transformation. Eli Hasson, founder of PHIL Ventures in Tel Aviv, stated: "We are facing a problem of insufficient data. We need to determine who our actual customers are."

Hasson invited pet entrepreneurs to create a digital ecosystem providing pet parents with information, assistance and high-performing products. "What we are witnessing out there is connection. Connected devices have evolved, not just the GPS trackers but also lots of different insights, such as pet health and activities. Services are growing, such as pet insurance, which has only 5% market penetration. Food is too generalized – there is a vast space for companies to provide more specialized foods, items and services."

The retailer perspective

The forum also provided an opportunity to analyze another important topic – the challenges of pet retailing in a post-pandemic world with global headwinds.

Nicolò Galante, CEO of Italian pet retailer Arcaplanet, admitted that the customer's rising sensitivity to prices needs to be heard by the industry. Galante shared with the audience that his company's strategy to maintain customer loyalty was keeping some items at a lower price for a year and guaranteeing a 15% continuous discount applied to vet products.

Upselling and cross-selling are also important tactics for facing challenging times. Timo Tervo, CEO of Pet Network International (PNI), described how training a sales team in these techniques could also help to manage price sensitivity.

PNI focuses on changing customer pricing with data analysis, using an AI-based CRM that leads to a much better understanding of customer behavior. "We have categorized our customers into different spending brackets. This is the key, targeting the groups of people we want to bring up to a higher bracket later," he shared. In addition to the power of data, the company has implemented a substantial expansion plan and launched a new store concept to secure its market position in Eastern Europe.



Modeling smarter shopping

The event hosted a panel discussion to analyze different business models and the future of pet retail.

Frédéric Le Guen, CEO of French pet retailer Animalis, argued for better information as an essential tool to guide customers toward smarter shopping behavior, and as a strategy to maintain loyalty.

Alexander Thelen, co-founder of German pet supplement start-up mammaly, said that consumers paying more attention to prices before purchasing a product can be an opportunity for the industry. "People in the pet supplement category are less price-sensitive, because these are health solutions for a pet. On the other hand, it's an opportunity for us to grow – and to think about new target markets for entry-level price products."

According to Marco Hierling, CEO at e-commerce player AlphaPet Ventures, inflation hasn't changed loyal customers' purchasing habits, but has made finding new customers challenging: "Customers focusing on good quality and affordable prices is a trend that will continue," he said. The recipe for success is a strong brand and a strong product.

Omnichannel was also a topic of discussion for the panelists. According to Hierling, pet brands must be available where the customer wants to buy their product – online and offline. "That's why multichannel approaches are the way forward," he concluded. Le Guen advocates an omnichannel approach to beat the competition. While there is space for everyone, he warned: "Not everyone will survive in the next few years. That's why it is important that more traditional retailers completely embrace the omnichannel strategy."

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Healthy eating and vet advice

A current trend that was much talked about at the event was pet parents' interest in healthy food for their furry friends.

Liseth Galvis from Euromonitor pointed out that the rising demand for health products and pet supplements will be one of the most important trends to watch this year when it comes to pet food. Supporting that, Mintel's Kate Vlietstra reported that nearly 6 out of 10 pet parents aged 16 to 34 are interested in a personalized diet plan for their pets. "For many pet owners, healthy food means fresh food. Frozen, raw, biological food is becoming increasingly relevant."

Marta Sutkiewicz from Similarweb showed how sales of vitamins and pet supplements increased in the US in 2023. A good example of this rising trend is the fact that a growing number of e-commerce websites selling pet products now offer high-quality, fresh and customized pet food options that are convenient and easy to access for pet parents.

VetFamily's Chief Operating Officer Michael Thunell highlighted the importance of veterinarians in providing a healthy diet for pets. "Given that 87% of pet parents want nutritional recommendations from their vet, this is a big market opportunity," he concluded. ♦

The next GlobalPETS Forum will take place in Prague from 22 to 24 January 2025.

The consumer's role in sustainability

Once again, sustainability was mentioned in a lot of keynotes.

For Arcaplanet's Galante, pet businesses need to go as fast as the customer is ready to go. "We are trying to achieve a positive environmental outcome by involving our customers in our social impacts. Rather than doing social good on their behalf, we could have a real social and environmental impact if we guarantee customer participation in sustainability through sustainable consumption," he proposed.

Arcaplanet's motto is to "improve social impact for sustainable consumption", which is why the company has implemented emission measurement and target setting, a lower footprint store concept, commitment to circularity and waste reduction, and the promotion of low-footprint consumption.

The advice Erin Haas from the Pet Sustainability Coalition gave to GPF attendees was that, despite the time-consuming process, it is essential to stay compliant and take a step further to gain competitive advantage. "A strong ESG strategy will set you apart and ensure you're more able to seek the additional investment you're looking for," she said.

Haas also pointed out that corporate sustainability will improve business supply chain resiliency, increase loyalty and trust, strengthen brand image, and decrease reputational risks.



Tractive wins GlobalPETS Forum Award

The Austrian pet tech company follows in the footsteps of 2023 award winner Snellman to take home this annual prize.



Michela Fantozzi
Contributor
PETS International

GPS tracking and wellness monitoring platform Tractive has won this year's GlobalPETS Forum Award, a prize given yearly to a company that has demonstrated exceptional performance, for its GPS-tracking and health and activity-monitoring platform for cats and dogs.

Digitalizing the pet industry

The judges selected the Austrian company from other nominees, including Kormotech, Laroy Group, Earth Rated and Vet Planet.

"Receiving this recognition is fantastic," says Tractive CEO Michael Hurnaus after being given the prize during the GlobalPETS Forum 2024 in Venice. "We're very excited that the pet industry is becoming increasingly digital."

Tractive's GPS device is aimed at showing pet parents their pet's movements and health patterns through an app. "When cats and dogs get lost, they could return in a few hours. But it's a very long time for pet owners, and that's what we set out to solve," notes Hurnaus. US animal welfare organization American Humane estimates that 1 in 3 pets become lost at some point in their lifetimes. Additionally, more than 80% of missing pets are never found.

US animal welfare organization American Humane estimates that 1 in 3 pets become lost at some point in their lifetimes.

Business model

In 2023, Tractive brought in €87 million (\$93.92M) in revenue – 45% more than the year before – and 1 million subscribers.

The company's services are split into 2 purchases: the tracker device (costing from \$/€49.99) and the app subscription – \$96 (€84) per year – which gives customers access to their pet's movements, wellness score, predictive health alerts and the activity/sleep monitoring feature. While Hurnaus points out that it loses money on the device, the business generates revenue through the monthly subscriptions that pet parents pay.

Customer centricity is key to Tractive's success in a very competitive market. The company has a team dedicated to customer care and collecting feedback to develop its products and services.

"For us, the prioritization is to make the product first, even if the product is more expensive, even if we don't sell as many as we would like, we want to ensure the product quality is the best," says Hurnaus.

A winning idea

Founded in 2012, Tractive released its first GPS tracker in 2013. At this point, the device could only monitor a dog's movements.

The idea for a pet GPS came from Hurnaus' experience. "A friend of mine lost his dog. He called me to help find him," he explains, adding that while searching, he couldn't believe there wasn't a product and app that allowed dog owners to track their pet on their phone. "So, I had the idea to create the device and found two co-founders. And that's kind of the root of how it started," Hurnaus states.

Between 2016 and 2022, the company focused on collecting data, growing sales and opening new offices in Austria, Germany, the UK and, more recently, the US. Tractive has 230 employees from 40 countries across the globe.

A fundamental shift

2023 was a year of change for Tractive when it added a new feature to detect when a cat or dog is not feeling very well, thanks to artificial intelligence (AI).

"We brought this feature out a few months ago silently," the CEO says. "The only thing we did was, using our data, send an email to the customer whose pet was having a problem – just a plain, straightforward email telling them about it – and the feedback that we have received was tremendous."

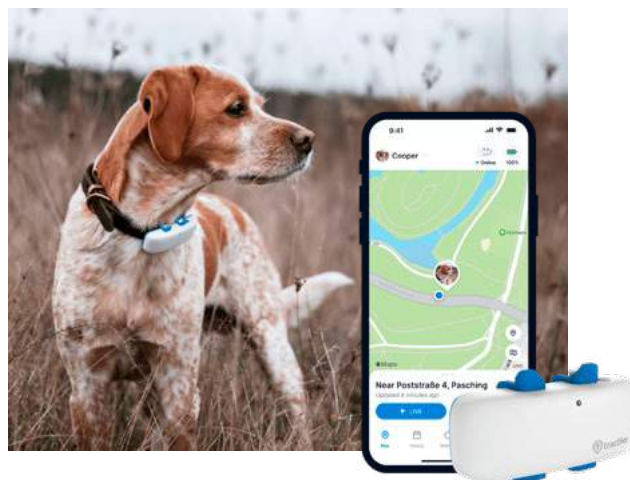
The company has been using AI for multiple years, but since the launch of ChatGPT, its usage has expanded to identify health issues, hardware failures and network coverage problems.

New opportunities

Lastly, Hurnaus explains that, with only 0.4% of dog and 0.1% of cat owners as customers, Tractive still has massive market penetration opportunities to cover. This would include using activity and health data to upsell food and supplements.

This is not something the company currently does, but Hurnaus says it's open to the possibilities. "This shows a few opportunities we and anyone could do with data, such as upselling certain supplements when your dog doesn't sleep well."

He concludes: "It is also possible to verify how well a supplement works; why not? We have companies that use our products exactly for purposes like this." ♦



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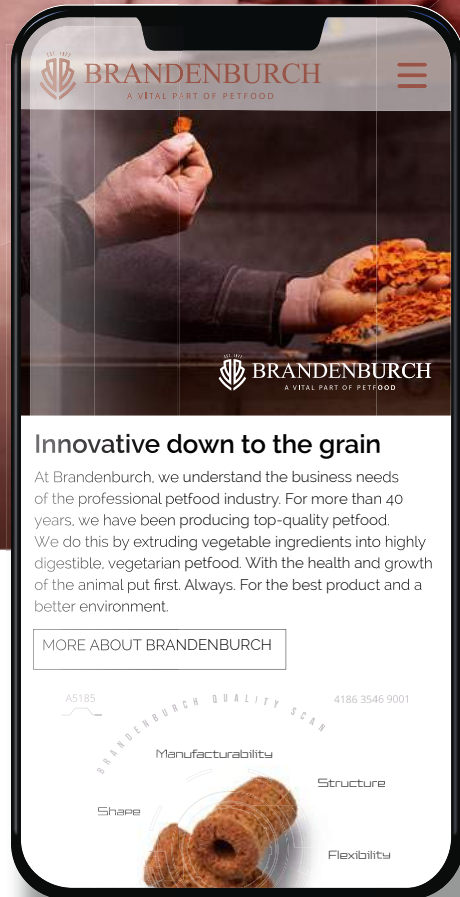


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We invite you to our new website. There you can read all about what Brandenburch can contribute to the development of your new recipes.



Formulation requirements on moisture and starch for extrusion



Maximizing nutrition while optimizing the processing of extruded products can be a challenging operation.



Laura Ward
Pet Nutritionist
rewardingpetnutrition.com

Among the huge variety of pet food formats now available, there are differing requirements for formulation, and the parameters and measurements necessary to create good product are different for each. For the process of extrusion there are numerous points requiring careful control to ensure the desired effects on the finished product. Moisture and starch are two such parameters.

Starch gelatinization

Starch is the primary carbohydrate form found in pet foods. It is an important energy source; however raw starch is undigestible by dogs and cats. Extrusion is a process which, in its simplest form, is starch cooking.

Starch granules within carbohydrate ingredients swell and break during extrusion in a process known as starch gelatinization. The granules lose their crystalline structure and fragment due to heating and shear force respectively. This resulting gelatinized starch is soluble and can absorb large quantities of water.

The degree of gelatinization affects the viscosity of the extrudate, in turn affecting the physical and chemical characteristics of the kibble. The effect of starch gelatinization on different ingredients varies. For tapioca starch, as well as barley and corn starches, gelatinization improves digestibility. For wheat and oat bran starches, digestibility is unaffected.

Settings during extrusion also affect the degree of gelatinization. Examples of this include high screw speeds (400rpm) decreasing starch gelatinization, as well as extrusion under high-moisture and high-pressure conditions leading to incomplete gelatinization and an increased availability of in-vivo and in-vitro starch.

Starch gelatinization plays a key role in kibble expansion. It gives the stretchy, gas-holding capacity of the extrudate, as for instance gluten in a bread dough does. Studies report that for good kibble expansion, starch content should exceed 60-70%. Starch content of 30% in cat foods, puppy foods and high-meat foods is typically seen, with 40% starch content more applicable to other adult dog foods.

Use in binding

Starch also contributes to binding ingredients in the final product, with amylose contributing greater binding properties than amylopectin. This indicates that formulators requiring greater cohesion of the final product should choose amylose-rich starches, such as potato and tapioca, to achieve this.

Starch retrogradation

Retrogradation of starch occurs when gelatinized starch realigns to its crystalline structure. This is associated with cooling of starches in the post cooking step. Retrograded starch is a resistant starch: it is less digestible than gelatinized starch and behaves similarly to a fiber. Varieties of retrograded starches carry similar properties to fiber, such as benefits to gut health and fermentation to produce short-chain fatty acids.

As the extrusion and cooking processes used for particular ingredient combinations can manipulate the presence of retrograded starches, ongoing research considers how this may be implicated for benefits to health. Formulators should consider the implications of resistant starch in the gut alongside other nutrients being supplied to ensure the balance supports a favourable gut environment, rather than digestive disturbance.

Amylose-lipid complexes

Another interaction of starch found to occur during extrusion is the formation of amylose-lipid complexes (ALC). ALC are a type of resistant starch hypothesized to slow down digestion of the product. They also impact glycaemic index and insulin response to the product, among other health implications.

ALC formation is dependent on the quantity and varieties of lipids and starch present in a formula, as well as the degree of starch gelatinization. As the quantity of fresh meat ingredients within a product increases, the formation of ALC reduces.

Impact of moisture

Moisture also contributes to kibble expansion: with increased moisture comes a reduction in expansion. This is explained by the 'shrinkage and collapse of the extrudate' after maximum expansion is achieved. This lack of adequate expansion seen with increasing

The degree of gelatinization affects the viscosity of the extrudate, affecting the physical and chemical characteristics of the kibble.

moisture levels in extrusion is also connected with kibble hardness. Research from the West Bengal University of Animal and Fishery Sciences found that as water increases, kibble hardness also increased for every extrusion temperature tested.

Expansion limits

As extruded pet foods vary so massively in their composition, there are additional challenges to formulation. Each set of ingredients, and the analysis of each, means that performance through extrusion varies. Ingredients included in pet food are continuously changing, yet pet owners expect kibble quality and appearance to be maintained, no matter the ingredients included.

The trend of increasing meats, proteins and fat components of the pet diet at the expense of starch-containing ingredients means that extrusion is challenging and often very little expansion of the kibble is possible. When a particular bulk density is requested, this dictates the starch varieties and levels required in the formulation, as increasing starch decreases the bulk density of the final extruded product.

Searching for more solutions

As trends in pet food make extrusion more difficult, we look to other solutions to include the desired ingredients and maintain good kibble quality. Often, expansion is the compromise.

A thermal twin extrusion process can provide greater flexibility when producing kibble with high meat inclusion or low carbohydrate inclusion. By increasing the thermal cook, and reducing the mechanical cook, the extrusion process can be adapted to give greater options.

Research regarding the functions of starches is ongoing and will be important to best understand how to maximize the nutrition of extruded products while optimizing the processing of the final product. ♦



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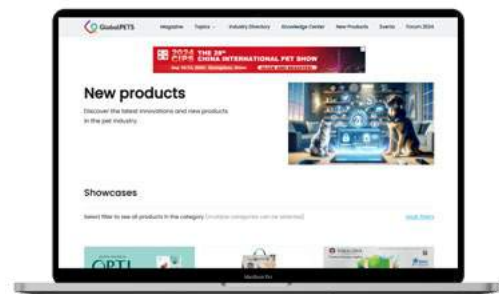


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It's not just about quantity: weight control and pet food

When it comes to controlling obesity in pets, there's a need to focus more on the energy density and nutrients of specific diets rather than just seeking to reduce feeding volume.



Julia Klischies
Pet Nutritionist
petfood-expert.com

Obesity is a disease of prosperity that has also affected pets. A survey by the Association for Pet Obesity Prevention (APOP) found 59% of dogs and 61% of cats in the US to be overweight or obese. As in humans, obesity in pets can lead to serious health issues. Time to shed some weight. But how should this be approached?

Ways to make progress

Simply reducing the amount of food is not a solution. Progress in this field should incorporate specific weight-loss diets, but also a focus on careful monitoring of body condition score, as well as providing support for pet owners.

Using an existing product, such as an already available adult formula, and just adjusting the feeding recommendation to create a weight-loss diet doesn't work. If you reduce the amount of a product by, for example, 20%, you not only reduce the calorie intake

but also the intake of essential nutrients such as amino acids, fatty acids, minerals and vitamins by 20%. Therefore, simply reducing the ration of regular food over an extended period poses a serious risk of nutrient deficiency.

Nutrients versus calorie intake

Looking at the nutritional guidelines from the European Pet Food Industry Federation (FEDIAF), it becomes apparent that it considers animals with different energy needs in its recommendations. For adult dogs, there are nutrient recommendations based on 95 and 110 kcal ME/kg^{0.75}, respectively, and 130 kcal ME/kg^{0.75} for growing dogs. These figures are guidelines and must be aligned with an animal's individual metabolism, activity level and living conditions.

For a product designed for weight loss, a formulation with low calories but an increased nutrient-to-calorie ratio is ideal. The goal is to ensure weight loss through the breakdown of body fat, while preserving muscle mass and providing vital nutrients for health and well-being.

[▶ SEE NEXT PAGE](#)

For a weight-loss product, a formulation with low calories but an increased nutrient-to-calorie ratio is ideal.

There seems to be a significant challenge in the market, as commercial weight-loss pet foods often have a wide calorie range. According to a study in 2010, out of 44 examined weight-loss foods for dogs, the calorie content ranged from 217 to 440 kcal per cup.

Feeding recommendations

Weight-loss diets typically fall under "feed intended for particular nutritional purposes", accompanied by indications for veterinary examination and diagnosis. Unlike regular pet foods, where feeding recommendations are often broad, the recommendations for weight-loss diets should be detailed to provide pet owners with meaningful guidance. It's important to also consider treats and snacks in the daily ration.

Instructions on how to handle mixed feeding should also not be overlooked. Simply replacing half of the amount of wet food with the exact grams of dry food (which has a much higher nutrient density) inevitably leads to drastic overfeeding.

Body Condition Scores

Regular veterinary check-ups during weight loss are highly recommended to adjust the ration continuously and monitor the pet's health. This is sensible since both weight gain and obesity, as well as unexplained weight loss, can be consequences of various diseases that need to be clarified beforehand.

A body condition score (BCS) system helps in this regard. Although there are breed-specific average values for the optimal weight of an animal, these serve as a general guideline. Whether an individual's weight is within the ideal range must be considered in combination with the body structure.

There are numerous BCS that help categorize an animal's weight status into various levels (overweight and underweight). Most often used is the 9-point BCS system designed in 1995, with updates in subsequent years. It includes an estimation of body fat, physiological body features and a percentage deviation from the ideal weight. The BCS system

Ingredients suitable for weight loss food

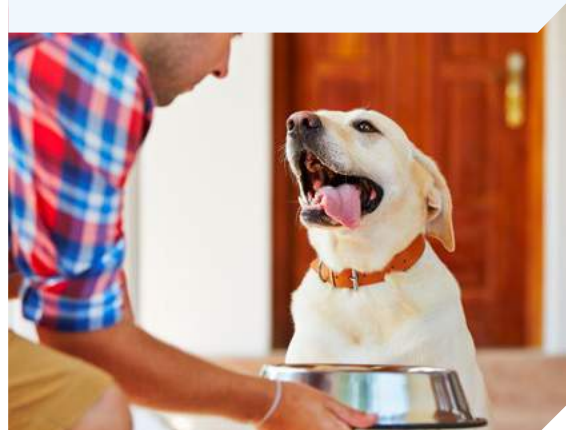
Lean muscle meat: Lean meat, such as chicken, provides an excellent nutrient base.

Protein isolates/hydrolysates: Proteins are essential for muscle maintenance. Protein isolates of plant and animal origin are a good way to increase the protein content of pet food without adding extra fats.

Omega 3/-6 oils: Although animal and plant ingredients already contain natural fats, adding an appropriate amount of omega 3/-6 oil blend ensures the complete coverage of essential fatty acids.

Fiber, e.g. cellulose: Fiber helps increase the volume of food without significantly contributing to the energy content. A higher volume of food supports the pet's satiety and gives pet owners a positive feeding experience. Pet owners who feel their pet is hungry or receiving a noticeably smaller food portion are more likely to feed them snacks or treats.

L-carnitine: This additive is essential for fat metabolism, acting as a transporter of fat components to the mitochondria, where fat is burned. L-carnitine is also produced by the body itself.



is an ideal reference and should be made available to buyers of weight-loss pet foods in an understandable format for monitoring their pet's weight development.

Focus on fat and starch

A study in 2023 from the College of Animal Science and Technology, Beijing, evaluated that reducing energy density combined with the use of pea starch represented valuable concepts for supporting weight management and positively affecting the gut health of cats. The fat content and starch source directly impact the gut microbiome.

The presence of beneficial gut bacteria was significantly higher in the fat-reduced diet with pea starch as the carbohydrate base compared with control groups with higher fat content or corn starch as the carbohydrate source.

Additional support

What else can developers of weight-loss pet foods do to support customers' pets effectively?

In addition to focusing on ingredients, correct nutrient calculation and specific feeding recommendations, there are tools that pet owners can use to support their pets on the weight-loss journey.

Pre-portioned meals tailored to daily activity levels (e.g. special breakfast, lunch and dinner portions) would be a helpful measure to avoid overfeeding. Such measures are best implemented by pet food companies offering pet food as individual rations, but a reduced version of this idea is also feasible for the general pet food industry.

Properly scaled measuring aids are also a great support for pet owners. In particular, measuring cups for dry food are often roughly scaled and show significant deviations during control weighing. Therefore, using a measuring cup with the smallest diameter or offering a ladle with an integrated scale would be beneficial.

Realistic training programs, a motivation app with rewards for pets and their owners, or food diaries immensely help customers and simultaneously strengthen trust and brand loyalty. ♦

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The many roles biotics could play in pet products

With the ability to address issues across pet well-being, from gut health to brain function, biotics are ripe for development into novel products targeting specific needs.



Greg Sunvold
PhD Nutritional Sciences
microbiomenexus.com

The need for innovative pet product presents exciting opportunities to savvy marketers and entrepreneurs. Unmet product needs are evident, based on the top claim areas of digestion and immune health, continued demand for more effective dental products and the emerging interest in nootropics. Biotics may have the potential to fill many of these gaps in the market.

Delving into biotics

There are varying types of microbiome-enhancing ingredients. These improve not only gut health but also several areas outside of the gut such as the brain, joints and oral cavity.

Fermentable dietary fiber (e.g. beet pulp, pea fiber) nourishes the gut through its breakdown by gut microorganisms. Prebiotics (e.g. fructooligosaccharides, inulin) feed the beneficial bacteria. Probiotics (e.g. Bacilli, Lactobacilli) add beneficial, active organisms to the microbiome and postbiotics (e.g. brewer's yeast, yeast fermentates) are bioactive compounds produced by beneficial bacteria.

The use of these tools is becoming more prevalent in diets, treats and supplements, although many products lack these ingredients or use inferior sources of them. New technologies continue to emerge: a recent study

from Cargill/Diamond V indicated that dogs fed a yeast fermentate postbiotic were assessed by their owners to not only have improved mood and immunity, but also better breath!

Influencing the gut

Gut actives such as the 'biotics' improve the composition of the microorganisms that live in the gut. An improved microorganism population will help nourish the lining of the gut by producing energy sources that are preferred by cellular lining. Probiotics have been shown to change the composition of the mucus secreted by the gut lining to be more effective in protecting the gut, and dietary fiber sources help produce the right types of energy sources for the gut.

Of course, gut actives are helpful to the gut. But communicating the specific effects can be a marketer's dream. One way to improve products would be to assure the presence of a moderately fermentable fiber blend along with prebiotic, probiotic and postbiotic sources at efficacious levels. Providing a gut defensive shield will pay dividends in food products committed to improving animal health and satisfying consumer expectations.

Effect on the brain

The market for human nootropic supplements now exceeds \$4 billion (€3.7B) with significant future growth expected. Prebiotics have shown benefits in improving cognition in humans. In pets, prebiotics such as

A recent study using a postbiotic developed for humans improved the immune health of dogs.

fructooligosaccharides and certain strains of Bacilli, Lactobacilli and Bifidobacteria probiotics have both cognitive and mood benefits.

Pet owners realize the benefit of having smarter, more trainable pets. Savvy messaging can help consumers understand that increasing specific prebiotics and probiotics in pet diets can improve cognition as well as mood.

An aid to oral health

Many different pet products exist to improve oral health. Most of these rely on mechanical action. While this approach is valid, this area remains a concern.

The mouth is like the gut in that it is home to many bacterial species. The opportunity exists for innovative pet brands to address this problem differently by favorably altering the microbiota of the oral cavity. Probiotics for human oral health exist but their application to the pet mouth remains underdeveloped.

Tackling skin disease

Atopic dermatitis (skin inflammation) is not uncommon in pets. A recent study found that when dogs suffering from this disease were fed a probiotic (Lactobacillus paracasei) and prebiotic (kestose) combination, their dermatitis severity and the use of steroid drugs decreased. Thus, microbiome tools can be leveraged in innovative pet products addressing skin health.

Boosting the immune system

Consumer interest in healthy immunity remains high. A recent study indicated that consumers believe biotics are effective at improving immune health (81% for probiotics, 65% prebiotics, 49% postbiotics). The ability to translate biotics immune science from humans to pets is strong. A recent study using a postbiotic developed for humans improved the immune health of dogs.

Discovering consumers' 'pain points' in their quest to improve their pets' health can unlock new product ideas. Many microbiome-enhancing tools exist to address these key areas and improve the health of pets. ♦

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Taking care of senior dogs: how can businesses address physical and mental well-being?

Maintaining an active lifestyle is crucial for older dogs' joint health and vitality, while keeping them mentally stimulated is essential for guarding against cognitive decline.



Jen Sotolongo
Contributor
PETS International

As dogs age, maintaining their agility and overall health becomes a key concern for pet parents. For businesses that are invested in the well-being of senior dogs, understanding the intricacies of joint health, mobility and mental stimulation is crucial for creating effective products and services. Products like joint supplements, exercise equipment and brain-teasing toys can all help keep older dogs active in body and mind.

Tailored solutions

Senior dogs may experience reduced mobility and stamina, but that doesn't mean they should forego exercise altogether. On the contrary, maintaining an active lifestyle is crucial for joint health, muscle tone and overall vitality.

Like humans, senior dogs lose their flexibility, mobility, balance and confidence as they age. "They need to learn new things, strengthen their muscles beyond cardio, maintain their balance and stay flexible and mobile," says Kathryn Groenewold, Director of Marketing for Paw Prosper, which makes a range of pet mobility products.

For Groenewold, fitness is one of the primary drivers of overall dog health. "Challenging their bodies and minds

as they age slows the biological aging process for our seniors, both mentally and physically," she notes.

Swimming for health

Hydrotherapy – using water to help rehabilitate pets suffering from various conditions or injuries – is another transformative tool to enhance the well-being of active senior dogs.

Benefits of this treatment include weightless rehabilitation for dogs with mobility issues and injuries, keeping elderly dogs active, increasing range of motion and muscle tone, and developing strength and flexibility.

Water Dog Spa in Seattle uses a swim spa that allows dogs to swim with or without current. With this setup, the dogs "are not actually walking or putting weight on their joints", says owner Katie Benjamin. "Swimming is non-impact but offers weight resistance."

Equipment such as swim spas and underwater treadmills have revolutionized the physiotherapy and rehab landscape, offering versatile options to cater to the diverse needs of senior dogs.

Mental stimulation

In addition to physical exercise, senior dogs benefit greatly from mental stimulation to prevent cognitive decline and maintain their brain function.

West Paw, a leading provider of sustainable and durable dog products, highlights the importance of mental enrichment for senior dogs. The brand's interactive puzzles and new slow feeders offer these dogs a fun and rewarding way to exercise their minds.

"Many of our best-selling products for all life stages are enrichment toys like puzzle and treat toys designed to be filled with a dog's favorite kibble or treats," notes CEO Spencer Williams. According to him, such toys offer the mental stimulation dogs need to keep their brains active and their days interesting.

Aging and joint function

Joint health is crucial for aging dogs as the cartilage that cushions bones and prevents inflammation and pain becomes dryer, thinner and less effective. Aging can deplete cartilage, leading to reduced mobility and osteoarthritis.

"When a dog's mobility decreases with age, arthritis or injury, the joints receive less of the nourishing building blocks of joint tissue," says Jane Bernard, founder of supplement brand WagWorthy Naturals. "Older dogs

often have some degree of osteoarthritis, making it even more important to provide them with a joint-nourishing supplement."

WagWorthy Naturals contain glucosamine, chondroitin, methylsulfonylmethane and hyaluronic acid, which promote and support healthy cartilage and joint fluid, and inhibit cartilage-degrading enzymes.

Prevention is key. "That's why good nourishment and supplementation for cartilage tissue is important at all ages, not just once your dog shows symptoms of joint pain and inflammation," urges Bernard.

The role of rehab

Rehabilitation centers and veterinary clinics also play a pivotal role in ensuring the health and well-being of senior dogs.

"Professionals such as animal physical therapists, vets and trainers should always develop a training program with the dog's full history in mind including, but not limited to, age, size, breed, health history and previous injuries," points out Groenewold. ♦

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Health and wellness: a new angle for the cat litter sector

It's a trend that shouldn't be ignored – cat parents are increasingly concerned about their pet's well-being. So, there's room for growth in any area that can tap into this sentiment – including pet hygiene products.



Shannon Brown
Pet Brand Manager
Packaged Facts



Products that address health and wellness are becoming more popular, and one of these is health-monitoring litter.

Nearly half of all cat owners in the US have been paying more attention to their pet's health since the start of the COVID pandemic 4 years ago. Cat litter may not immediately come to mind when considering health and wellness, but products positioned around health concerns are an up-and-coming segment of the US litter market.

Shifting buying behavior

The Packaged Facts January 2024 Survey of Pet Owners shows that a clear majority of US cat owners believe that a pet benefits a human's physical and emotional health. In the findings, 87% of cat owners agreed that their pets are important to their mental health and 80% said their cats are important to their physical well-being.

Cat owners' increased regard for their own health has also spilled over into a lasting awareness of their cat's health. This has led to changes in some pet owner behavior, such as purchasing products that offer immune health benefits (15% of cat owners) and buying stress or anxiety related products (14% of cat owners).

For cat litter marketers, promoting their products along both human and cat health lines is advantageous. Litter that doesn't track mess through the home protects both humans and pets from exposure to pet waste. And low-dust litter prevents them all from inhaling excess litter dust in the air.

Addressing the cost of pet healthcare

The Packaged Facts data also confirms that some cat owners are struggling with health-related financial challenges in regard to their pets, with 37% pointing to both the high cost of pet healthcare and – more specifically – veterinary care expenses as significant issues. Additionally, 24% of cat owners cite the cost of pet medications and 16% note pet health problems in general.

Although this may not seem to be directly relevant to the litter category, the overarching trend is that

cat owners are likely to be receptive to products that offer to address health and wellness concerns, in part because they see this as a potential way to minimize future medical expenses.

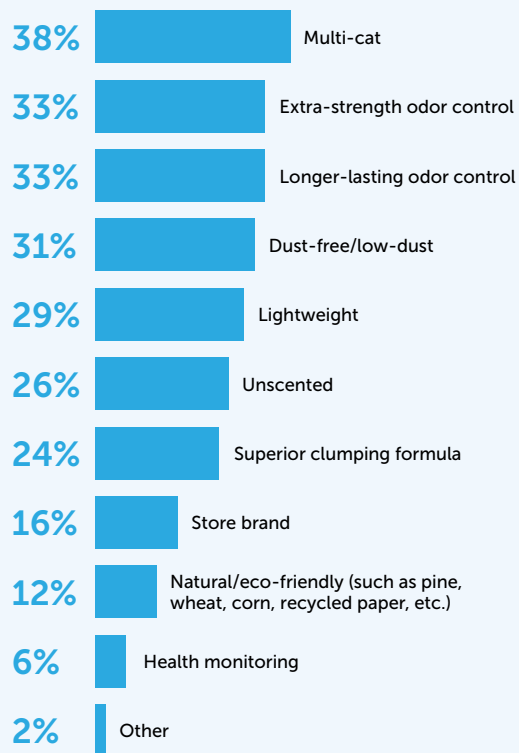
Health-monitoring products

Cats are good at concealing the fact that they are in pain. So even when there is an underlying problem, they can look – and act – perfectly healthy. As a result, a cat's hidden health issues can worsen without their owner being aware of it.

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Litter usage by type
(% of US households using litter)



Source: MRI-Simmons Summer 2023 National Consumer Studies
Percentages don't add up to 100% due to multiple responses



Products that address health and wellness are becoming more popular, and one of these is health-monitoring litter. This type of litter allows owners to keep tabs on their cat's health by examining changes in the litter box. In 2023, there were several new releases from major marketers, including Purina with its Tidy Cats Tidy Care Alert litter and Clorox with its Fresh Step Crystals Health Monitor litter.

According to MRI-Simmons Summer 2023 survey data, only 6% of litter users reported having used health-monitoring litter in the past 6 months. Other litter types that can be related to health concerns, such as dust-free, low-dust and unscented litter, are bought by a larger share of users.

Future opportunities

Cat owners are clearly becoming more aware that their pet's health is related to their own and that making a few changes in the products they purchase can have a positive impact. This awareness is an opportunity for litter marketers to make the case for how their products can help cat owners keep pets healthy and happy. ♦

Cutey

LOOKING FOR
DISTRIBUTORS AND PRIVATE LABEL
MANUFACTURERS



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Head Office Jeddah, Tel: +(966) 12 699 0999, Fax: +(966) 12 660 9201, Email: optc@optcl.net



The Angelcare Group CANADA

Unlocking convenience in pet care: the Litter Genie® and Pet Genie™ revolution

**In the world of pet care, innovation isn't just about launching new products
– it's about improving the lives of pet parents.**

At the forefront of these improvements stand Litter Genie and Pet Genie, offering solutions that transform the daily chores of pet ownership into effortless tasks. These brands are not merely about products; they're about providing solutions that ease the everyday routines of pet owners.

With a heritage spanning over 25 years and a presence in over 35 countries, The Angelcare Group, creators of the iconic Diaper Genie®, has consistently been at the crossroads of care and convenience, and its foray into pet care through Litter Genie and Pet Genie is no exception.

Litter Genie: elevating the cat care experience

Emerging from the expertise that brought you the Diaper Genie, Litter Genie tackles a problem all too familiar to cat owners: the challenge of litter box odors. Since its introduction in 2012, Litter Genie has rapidly ascended as a leader in the cat litter disposal market in the United States.

Litter Genie revolutionizes cat litter disposal with a user-friendly, three-step process – Scoop it, Drop it, Lock it – enhanced by an innovative odor-locking system and a multi-layer refill film with odor barrier technology. This combination effectively seals away odors, providing cat owners with an unmatched odor control solution.

Pet Genie: expanding excellence in small pet and dog waste management

While Litter Genie caters to the needs of cat owners, Pet Genie, the latest innovation from the Genie® family, offers a solution for the day-to-day challenges of disposing of dog waste. Whether for indoor or outdoor use, Pet Genie maintains the brand's commitment to odor control and convenience.

Constructed from durable plastic with UV protection, the Pet Genie bin is designed to withstand the elements. Its easy-to-carry handle and wide opening, suitable for a variety of waste

types, including pee pads and dog diapers, makes it an indispensable tool for keeping homes and gardens clean and healthy.

Leading with innovation and care

Litter Genie and Pet Genie redefine pet care with their innovative solutions, simplifying daily routines and allowing pet owners to focus on what truly matters – quality time with their beloved pets.

Behind these brands lies The Angelcare Group's unwavering commitment to merging care with peace of mind, a philosophy that has propelled it to international success.

As both brands continue to evolve, their focus on convenience, odor control, and effective waste management sets a new standard, ensuring pet care is made easier and more enjoyable for families everywhere. ♦

The Angelcare Group
angelcaregroup.com

TARGET and NEUTRALISE parasites !

FAST AND RADICAL ACTION

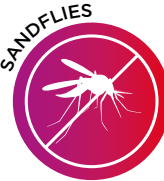
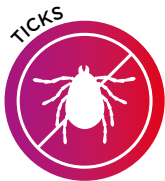


ECTO CHOC PARASITES

The new **ECTO CHOC** range of pest control products acts on parasites present on the **ANIMAL + ENVIRONMENT**.

Without rinsing, the new ECTO CHOC PARASITES range **QUICKLY THWARTS** infestation by external parasites on the animal and in its environment. It surrounds the parasite with a liquid film, blocking it and making it inactive or stopping it moving through the environment.

Its purely **MECHANICAL ACTION** and **PLANT-BASED INGREDIENTS** mean it can be used early on, on the animal and in its environment, leaving a fresh scent after use.



Efficacy tested against fleas and ticks on a panel of 30 dogs.

QUICKLY NEUTRALISES PARASITES



*3 references: for dogs/cats, environment and poultry.



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ECTO CHOC





How to meet the challenges of pet food distribution

Surging demand for pet food worldwide obliges companies to plan ahead. Here, an expert in the supply chain field describes the best approaches to adopt to ensure product is distributed efficiently.



Jim Chamberlain
Senior Managing Director
Alpine Supply Chain Solutions

The high demand for pet food is putting more pressure on the supply chain, as pet food distribution presents a unique set of challenges that requires careful consideration and strategic planning. Among these challenges, 3 main areas stand out: order consolidation, distribution network design and regulatory compliance.

Order consolidation = clever combinations

Consolidation is the process of shipping a number of individual orders at the same time. Shipments going to the same destination are grouped and shipped together to save costs and time. This is tricky in the world of pet food distribution, as these are products that can vary significantly in terms of size, packaging and type.

For instance, supply chain consultants Alpine recently worked with a pet food retailer that had a range of bulk dry goods, smaller non-food items and a growing number of products that required refrigeration. When it came to order consolidation, there was a lot to consider to ensure that each store received its orders efficiently, accurately and without any damage.

On the inbound side, the retailer often received palletized products from its manufacturers. It then had to break those down and rebuild outbound shipments that packed everything into new mixed orders, all without damaging any goods. [▶ SEE NEXT PAGE](#)

Network design plays a crucial role in the efficiency and effectiveness of pet food distribution.

Fine-tuned solutions

To get this exactly right, many pet food retailers are benefiting from consultants that employ sophisticated slotting tools. These yield-specific solutions maximize picking productivity, minimize forward pick replenishments, create like-item separation, minimize in-transit damage and focus on employee ergonomics.

Distribution network design analysis

Network design plays a crucial role in the efficiency and effectiveness of pet food distribution. Deciding on the location and number of distribution centers is critical to minimizing transportation costs and ensuring timely delivery to customers.

A growing number of Alpine customers have benefited from a Distribution Network Analysis (DNA). This is an exercise that analyzes extensive customer data to determine the ideal size, location and number of distribution centers required to meet customer service levels and order delivery cycles.

Examples of data examined during the DNA exercise are real estate costs for each proposed location, average wages for warehouse employees at each location and shipping cost reductions. Return-on-investment projections are included as part of the process, and it's not abnormal for millions of dollars in savings to be identified.

A recent project yielded a range of recommendations capable of generating annual savings of at least \$6 million (€5.6M) with modest changes, to as much as \$24 million (€22.2M) with a complete network overhaul.

Keeping up with regulation

As demand for pet food continues to increase, different types of pet food products – particularly premium – are proliferating. So regulatory compliance requirements, pet food recalls and reputational risk for both manufacturers and retailers are factors that are unlikely to go away. Different pet food products may be subject to various regulations and quality control standards imposed by regulatory agencies.

Ensuring compliance with these standards and handling any necessary documentation is crucial for avoiding legal issues and maintaining customer trust.

Pet food products may be subject to various regulations and quality control standards imposed by regulatory agencies.

Distributors must stay informed about evolving regulatory requirements and implement processes to ensure that all products meet the necessary standards before being distributed to customers.

Prompt action required

In the event of a product recall or quality issue, a Warehouse Management System (WMS) can provide accurate and timely traceability information. It allows businesses to identify affected products and take appropriate action promptly. If you handle pet food and you're evaluating WMS software, it's vital that you ask vendors to demonstrate how the solution handles recalls. They don't all work in the same way when it comes to this task.

Additional factors

In addition to the 3 most common challenges, the pet food distribution industry faces external pressures that can further complicate matters.

Price increases in the supply chain – driven by factors such as rising transportation costs, raw material shortages and inflation – can impact all aspects of distribution. Higher prices for ingredients and packaging materials can also affect production costs, ultimately leading to higher prices for consumers. Distributors must carefully manage these cost increases to maintain profitability while remaining competitive in the market.

Geopolitical pressures can also have a significant impact on pet food distribution. Trade disputes, tariffs and political instability in key regions can disrupt supply chains and affect the availability of certain products. Distributors may need to adapt their distribution networks and sourcing strategies to navigate geopolitical challenges and ensure a steady supply of pet food products to meet customer demand.

Pet food distributors must address all these internal and external challenges to ensure efficient and reliable distribution while meeting customer demands and industry standards. ♦

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