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MAY 2024

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Alibaba, Amazon &  
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Hall 1 / 338



Interzoo 2024



## Out of the ordinary: the exotic pet market

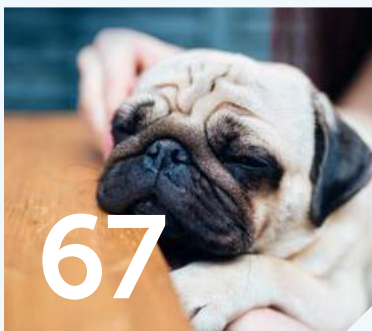
Whether it's a chinchilla or a bearded dragon, less run-of-the-mill pets are gaining in popularity, with owners looking to find products and services to suit.



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## Country reports: Turkey, Spain, Portugal and Greece

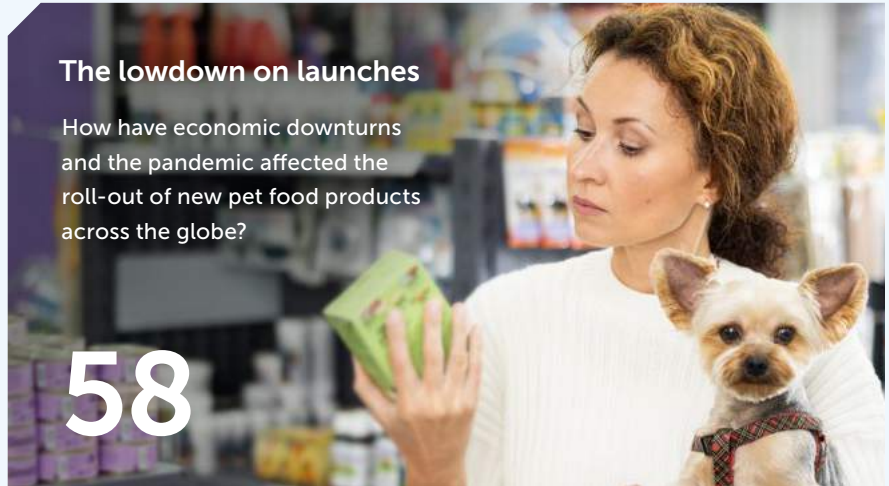
As pet owners across Europe increasingly consider their pets to be members of the family, there's an eager audience for new products and services.



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## The lowdown on launches

How have economic downturns and the pandemic affected the roll-out of new pet food products across the globe?



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## Re-evaluating feed additives

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Dedicated online selling platforms for pet products are gaining ground, so who are the major players, and what services and niches are best served by this development?

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# Meeting point

It is already a tradition that May is a month highlighted on all our calendars. It is a key moment for the pet industry as it's a chance to show the world and our peers the latest innovations and products that are driving the sector forward.

This year, the meeting point is Interzoo in Nuremberg. When I attended for the first time 2 years ago, I was impressed by the variety of companies taking part: from well-established players to relatively new start-ups created during the pandemic boom. More than 1,300 firms exhibited then. This year, the organization is predicting a record number of around 2,150 exhibitors.

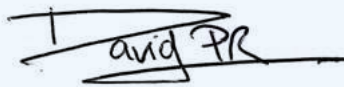
New players are entering the market, including an increasing number of companies that until recently operated exclusively in the so-called human space. This also means that interest in exhibiting at trade shows is growing exponentially.

Finding new customers and partners will be one of the main objectives for those attending Interzoo.

We asked our newsletter recipients and LinkedIn followers a few weeks ago and more than half (50.9%) said this was their main objective for going to the event. This was followed by discovering innovations or trends (30.7%) and meeting existing customers and partners (18.4%).

Although the cat and dog business still dominates – representing 8 out of 10 Interzoo exhibitors – products and services for rodents and exotic pets are growing in some regions. I invite you to take a look at our opening story, which analyses the state of play in this small but promising category.

If you are in Nuremberg, don't forget to visit us in Hall 1, Booth 1-139. We will be giving away a golden ticket for the GlobalPETS Forum 2025 in Prague!



David Palacios Rubio  
Head of Editorial



“Success is most often achieved by those who don't know that failure is inevitable.”  
COCO CHANEL, FASHION DESIGNER



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### 2023 market updates: US and Italy

The US pet industry posted sales worth \$147 billion (€135.6B) last year, according to the American Pet Products Association (APPA). This is 7.4% more than in 2022. Pet food and treats accounted for nearly 45% of sales with \$64.4 billion (€59.4B).

Packaged Facts reported that the American pet retail market saw an 8.1% increase in sales in 2023 to \$145.1 billion (€133.9B).

In Italy, data from consumer behavior consultancy Circana showed that sales of pet food across all channels grew by 14.9% between January and October 2023. The segment's turnover was over €3 billion (\$3.2B), with volumes remaining largely stable (+0.9%).

Cat food was the main segment driver with wet cat food constituting almost a third of the regional pet food industry's recorded turnover.

Consulting firm Casaleggio Associati found that e-commerce player Zooplus is the top choice for Italian pet parents buying online. Italian pet retailers Arcaplanet and Isola dei Tesori follow in second and third place.

### Pet food plant to boost New Zealand's export capabilities

A new plant for wet food manufacturer Riverland Food is expected to contribute to the objective of doubling the value of pet food exports in 10 years.

The state-of-the-art factory, which received an investment of \$21 million (€19.3M), is expected to be Kiwi nation's largest export cannery for pet food.

The site will have an annual production capacity of 30 million pet food cans and the company plans to export 98% of all the production, including to Australia, Hong Kong, South Korea, North America and Singapore.

New Zealand's pet food exports grew from \$45 million (€42M) in 2014 to \$195 million (€178.5M) in 2023.



### IKEA launches pet accessories collection

The Swedish furniture giant's new line UTSÄDD features 29 products for cats and dogs, including ceramic food bowls, soft blankets, beds and toys to "simplify and brighten up life at home".

The new items have been available since April in some markets and IKEA expects to expand to the rest of its locations between July and October.







### UK veterinary market under scrutiny

The UK's Competition and Markets Authority (CMA) is considering launching an investigation into Britain's veterinary market due to concerns about high pricing and weakening competition led by potential market monopolization.

The competition watchdog warns that British pet owners might be overpaying for medicines and prescriptions as over 80% of veterinary practices currently do not have any pricing online.

According to the body, 60% of the 5,000 existing vet practices in the country are owned by larger groups.

The British Veterinary Association (BVA) has expressed its support for the CMA's investigation but highlighted that rising prices "are a concern for everyone" and drew attention to the fact that there is no public health service for pets.

### Belgian supermarket chain wants pet product pitches

Delhaize is looking to broaden its product offerings and add premium pet products to its shelves after noticing an increase in sales in the category.

The second biggest supermarket chain in Belgium has partnered with product discovery platform RangeMe, where applicants can showcase their products to Delhaize's purchasing team. Those pet companies interested in presenting their products will be able to do so in pitch sessions taking place in May.

"We want to improve and broaden our assortment to ensure that our clients find their preferred products in our stores," a Delhaize spokesperson tells PETS International.



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### Talks to sell Partner in Pet Food on hold

A bid submitted by private equity (PE) firms CVC Capital Partners and Advent International to acquire the European pet food business Partner in Pet Food (PPF) is now on hold.

According to Bloomberg, PE firm Cinven and owner of the company since 2018 considers the bid as "undervalued". Cinven was reportedly seeking a valuation of €2 billion (\$2.16B) for the sale of the assets.

Hungarian-based PPF produces more than 450,000 tons of pet food annually and operates in 38 European countries.

### Officials call for pet-friendly policies in Shanghai

Legislative and political advisory bodies in China's largest city have suggested making public places and public transport more pet-friendly to attract a younger working-class pet-owning generation.

Proposals include the demarcation of a certain ratio of public spaces for animals through the use of unified logos across shopping malls, parks, restaurants and hotels.

Officials also have urged the creation of pet management regulations to improve registration, licensing, epidemic prevention, medical treatment and pet adoption. In addition, there is an ongoing discussion to create a set of regulations and supervision system for the industry.



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## DATA INSIGHT



# 42%

**of Gen Z pet parents in the US have their pets insured**

They are followed by millennials (31%), Gen X (17%) and baby boomers (13%), according to new research by personal finance firm NerdWallet into 1,300 dog and cat owners. Most pet parents have insurance for peace of mind (57%), while others get cover to keep costs down (42%).

# 1

American pet care business software provider **MoeGo** raised \$24 million (€21.9M) in a Series A funding round.

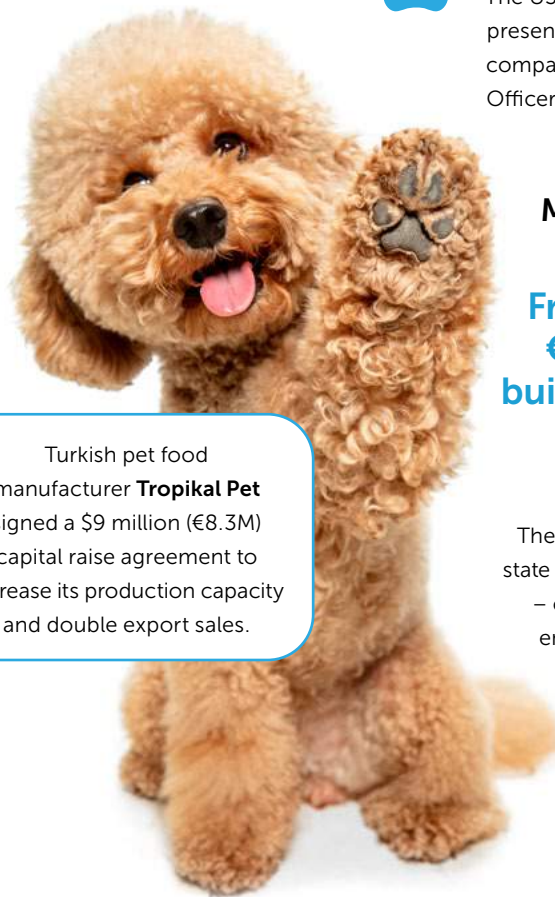
## TOP 3 INVESTMENTS

# 3

New Zealand pet cannabis start-up **Hale Animal Health** secured an investment of \$1.1 million (€1M) to complete clinical trials and fund the process of registering cannabis-based medicines for dogs.

# 2

Turkish pet food manufacturer **Tropikal Pet** signed a \$9 million (€8.3M) capital raise agreement to increase its production capacity and double export sales.



## NEW APPOINTMENTS



### BARK

The dog product, services and content business appointed Michael Black as Chief Revenue Officer and General Manager for consumables, and Michael Parness as the Chief Marketing Officer and General Manager for play.



### Carnivore Meat Company

The American freeze-dried and raw pet food manufacturer made Heather Govea its new CEO.



### Alpha

The US pet food manufacturer presented Fred Jasser as the company's new Chief Financial Officer in a bid to drive growth.

## MOST READ NEWS ON THE WEBSITE

### Fressnapf pumps €80 million into building its largest e-commerce warehouse

The new facility in the German state of North Rhine-Westphalia – close to Cologne – aims to enhance the retailer's supply chain capabilities and market expansion plans.

**LATEST NEWS**





# The business of exotic pets: an update

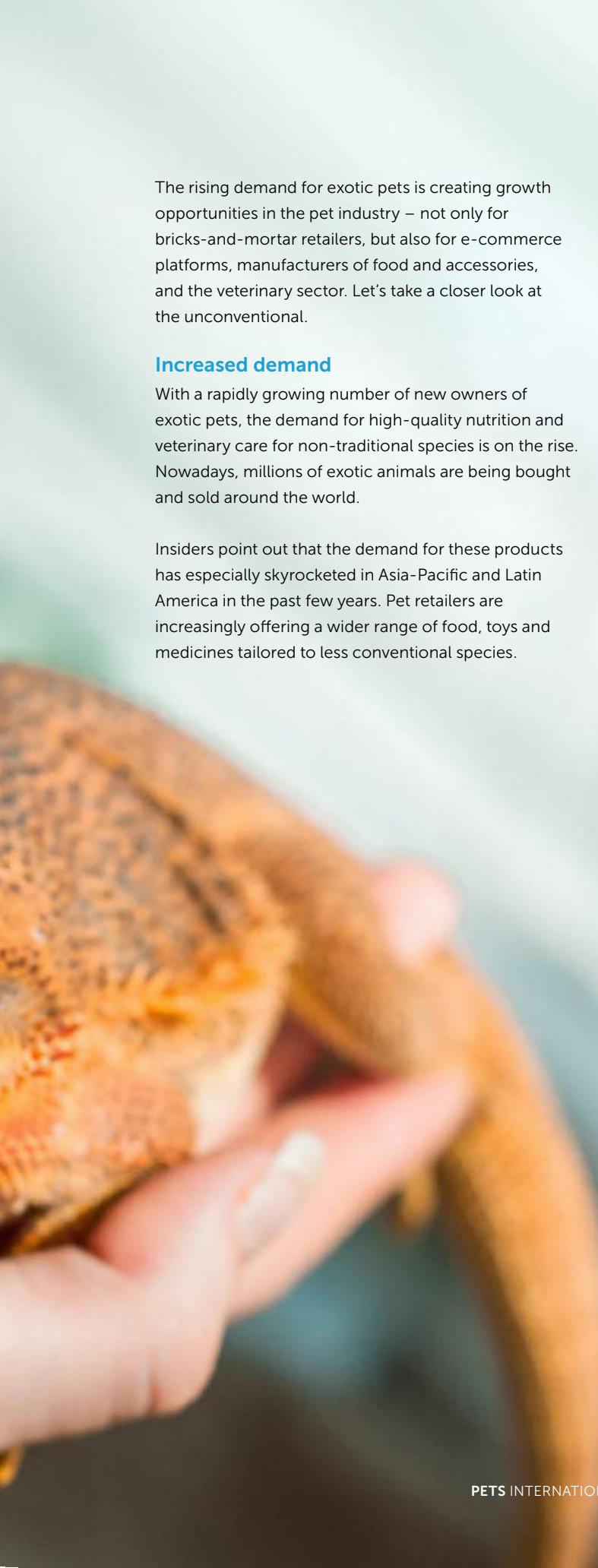
Less conventional species are increasingly capturing the hearts of consumers. Could such animals ultimately be even more profitable than cats and dogs?



**Edgar Maciel**  
*Contributor*  
*PETS International*







The rising demand for exotic pets is creating growth opportunities in the pet industry – not only for bricks-and-mortar retailers, but also for e-commerce platforms, manufacturers of food and accessories, and the veterinary sector. Let's take a closer look at the unconventional.

### Increased demand

With a rapidly growing number of new owners of exotic pets, the demand for high-quality nutrition and veterinary care for non-traditional species is on the rise. Nowadays, millions of exotic animals are being bought and sold around the world.

Insiders point out that the demand for these products has especially skyrocketed in Asia-Pacific and Latin America in the past few years. Pet retailers are increasingly offering a wider range of food, toys and medicines tailored to less conventional species.

The recent expansion of product availability among some e-commerce players is also a sign of popularization. Minnesota-based exotic animal nutrition producer Mazuri – which claims to have more than 500 brand references in its portfolio – started targeting consumers who acquire exotic animals as pets a few years ago. It has leveraged online to tap into this new market.

### Growth strategy

In 2023 alone, the company's net sales increased by 5% through pet specialty retailers and 19% through e-commerce channels. "Part of our growth plan and strategy has been to expand internationally and then venture into retail. You have to be visible and available in e-commerce," says John Zeloski, Director of Mazuri, in an interview with PETS International.

The firm already expanded its e-commerce operation to Chewy in 2019, offering over 50 food options for alpacas, mini pigs, chinchillas, hedgehogs, reptiles and birds. Mazuri plans to seal a new retail partnership in Canada this year and to continue its expansion in Latin America – including Brazil – as well as Asia-Pacific, the Middle East and Europe.

### Profit potential

In Zeloski's view, the exotic pet market has the same profit potential as dogs and cats. He further notes that receptiveness to products for exotic animals is growing rapidly, fueled by owners' curiosity to learn more about these species. "Our customers like the fact that they are feeding a unique animal. It's not just a dog or a cat. They take pride in themselves, and enjoy telling friends they've got bearded dragons or a chinchilla," he explains.

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According to him, more retailers are taking notice of category growth. “They want their piece of the pie,” adds Zeloski. “You’re selling bedding, you’re selling water and feeders. You’re selling other things that you may not have previously sold. And so allied lines are a huge area and opportunity for growth for a lot of retailers.”

### Tapping into opportunities

Brazil is one of the world’s most biodiverse countries, and this is reflected in the new consumer trend of adopting unconventional pets. Veterinary Nurse Leticia Andrade had always focused on caring for dogs and cats, running a pet hotel in São Paulo. But after the adoption of exotic and small animals skyrocketed in Brazil, she changed the course of her career.

“People often have pets for the status on social media, but lack the skills to understand the species and what they really need,” she states. In September 2022, she opened Letty Sitter, a 150 sq m space offering specialized consultations on basic care for unusual pets such as blue macaws, cockatoos, monkeys, snakes, chinchillas and even ravens.

### Steep learning curve

This proved so popular that Andrade says she had to open a waiting list and turn down over 50 animals due to a lack of space. “In the past 2 years, we’ve already tripled the size of the business,” she comments. Letty Sitter recently moved to a 400 sq m location, where it now offers veterinary services and open space for exotic species to interact and play.

“It’s a business where you need to be constantly learning. Dogs and cats have patterns. But with exotics and wild animals, handling is very important. Each species has its peculiarities, diets and routines,” explains Andrade. “For example, reptiles eat rodents, so I need to keep a freezer stocked with mice to feed them while they stay here. This adds complexity to the operation of the business.”

### Taking account of risks

A recent study by the UN’s Intergovernmental Science-Policy Platform on Biodiversity and Ecosystem Services (IPBES) pointed out that over 37,000 species of animals and plants reside in habitats where they don’t belong due to human intervention. Unfortunately, some of these cases are the result of malpractices such as animal trafficking.

According to experts, removing wild species from their natural habitat is not without risks. For example, Hector Barros, a Conservation Biologist at the University of São Paulo, warns that exporting exotic species poses a significant risk to the population of these species, potentially leading to extinction.

“When we observe high demand for certain species, many often die along the way because they don’t have the proper conditions,” warns Barros. “And when they reach their final destination – the owner’s home – the space is small or the food is incorrect. Many end up dying within a year in the new habitat,” he says.

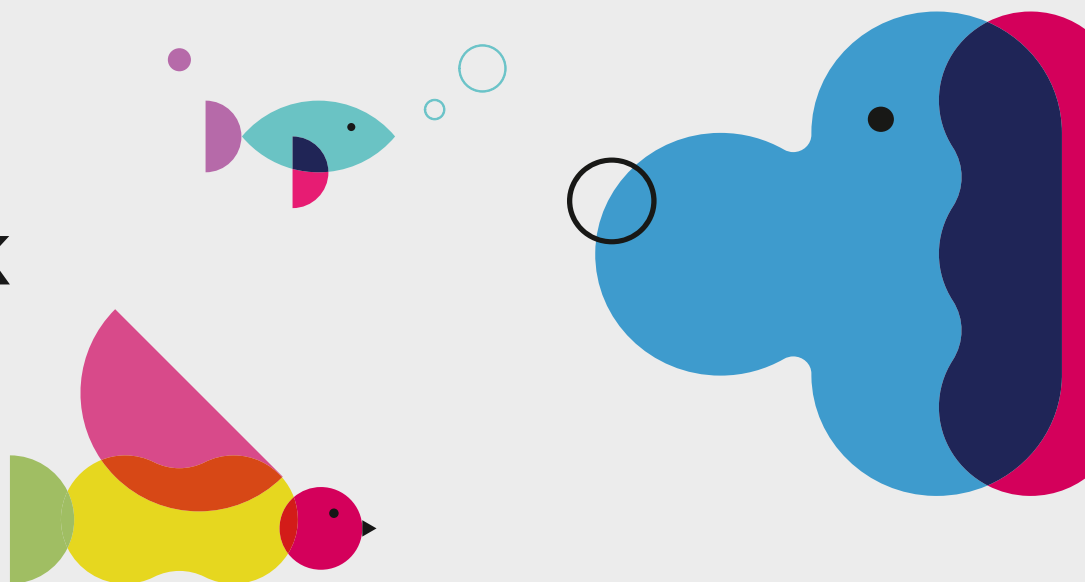
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***Receptiveness to products  
for exotic animals is growing rapidly,  
fueled by owners’ curiosity to  
learn more about these species.***





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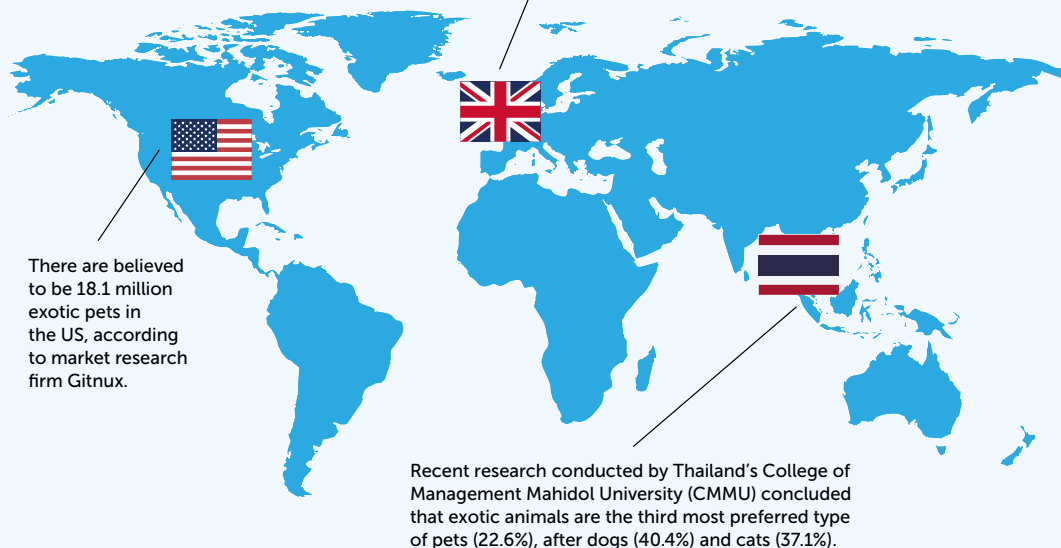


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## Exotic pets around the world



Another risk can be the emergence of new viruses and diseases among humans. Scientists estimate that over 6 out of every 10 infectious diseases in humans originate from animals.

Experts are therefore calling on governments and consumers to work together to ensure that exotic pets have living conditions closest to their original habitat. "When buying an animal, the consumer needs to know its origin, have documentation, learn about the species and what it needs to have the best quality of life," explains Barros. "And most importantly, don't just buy an animal because it's pretty. You need to question whether you have the time and the space that the species requires."

### Restricting sale and ownership

To tackle the complex challenge of balancing commercial interests with global wildlife protection, some countries are taking measures to restrict the ownership and sale of exotic animals.

For example, under a new set of rules recently presented by India's Ministry of Environment, Forest

and Climate Change, citizens owning exotic pets such as macaws, cockatoos and turtles will have to register them with the state wildlife department.

Meanwhile, in 2023, Pakistan decided to ban the capture of wild animals, reversing a provision that had been in effect since 1979. Individuals in possession of exotic species are now required to declare and return the animals to the Islamabad Wildlife Management Board. This is expected to particularly have an impact on big cats, which have gained popularity as pets in recent times. The private sector is now also prohibited from operating breeding facilities for wild animals.

In the United States, each state has autonomy to determine how the trade of each species will operate. According to a survey by the University of Michigan, 19 states have a comprehensive ban, while 13 others have a partial ban. The state of New York plans to completely ban the exotic animal market. Legislators there are currently discussing a bill aimed at refining and broadening the definition of wild and exotic animals to ensure proper regulation and to prohibit their importation, sale or ownership. ♦



# Latest figures reveal global growth trends in the pet care industry



**A new forecast confirms that the sector is expected to continue growing in 2024 – but at a slower rate.**



**David Palacios**  
*Head of Editorial*  
*GlobalPETS*

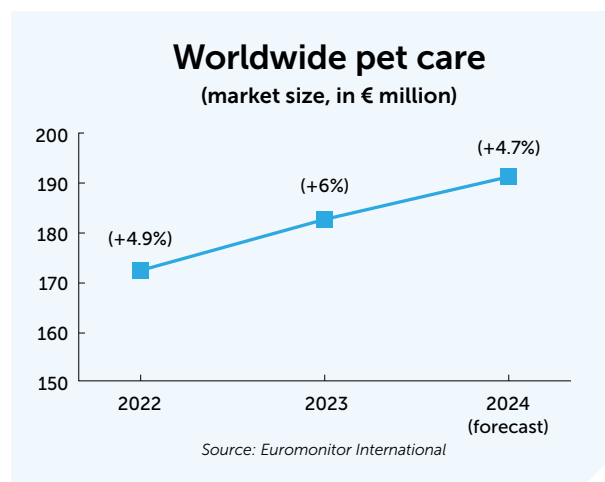
Some pet owners have begun or are considering trading down the amount they spent on pet supplies, while others are switching to more affordable brands. This change of attitude is anticipated to impact the global market share of the pet industry this year.

## A worldwide perspective

The global pet care industry is forecasted to represent €191.2 billion (\$207.6B) by the end of 2024, 4.7% more than last year.

Fresh data from market researcher Euromonitor International projects that the pet food segment will increase at a higher pace than the overall industry, with the market representing €140.2 billion (\$152.2B) by the end of 2024. This is 5.3% more than in 2023, when the pet food market hit €133.2 billion (\$144.6B).

The pet products category is also forecasted to increase its market share by 3% this year. According to Euromonitor, it is expected to represent €50.9 billion (\$55.3B) worldwide in 2024. Last year it represented €49.4 billion (\$53.6B).





*The global pet care industry is forecasted to represent €191.2 billion (\$207.6B) by the end of 2024, 4.7% more than last year.*

### A slower pace of growth

The market research company confirms that the pet industry is performing well, but it forecasts a slight slowdown in comparison to previous years.

While in 2023 the performance of the global pet industry registered an increase of 6% against the previous year, in 2024 this growth rate is expected to represent 4.7% (-1.3%). This is in line with the growth registered in 2022.

Despite the expected increase in the pet food category, Euromonitor forecasts that the segment will be the most affected by this downtrend. This year the pet food segment could grow 1.6% less than it did in 2023, according to the data. The growth in the category would also be lower than it was in 2022.

On the other side, pet products would register a flat trend this year and grow at the same rate as in 2023 (3%). The category is expected to perform better than in 2022 though, when it grew by 2.2%.

### Insights into the US market

Recent data released by Packaged Facts forecasts that the US pet industry will hit sales of \$152.2 billion (€140.9B) this year, 4.9% more than in 2023.

Despite the upward trend, the market research company predicts that the sales growth will decrease from 8.1% in 2023 to 4.9% in 2024.

A Packaged Facts survey of pet owners carried out in January 2024 showed that 15% of dog owners and 13% of cat owners in the US spent less on pet care.

Sales are expected to hit \$192.35 billion (€177.2B) by 2028 at a compound annual growth rate (CAGR) of 6%. ♦

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## Discovering how sustainable packaging influences purchasing decisions

In a new study, almost half of the consumers asked said they buy sustainable pet product packaging to reduce their environmental footprint.



**Paula Flores**  
*Contributor*  
*PETS International*

The latest research conducted by PETS International and Yummypets reveals the importance of sustainability claims on packaging for buyers in the UK, France, US and Canada. It confirms that most pet owners are aware of sustainability issues, and that ecological credentials are often important purchase drivers. However, levels of awareness differ considerably depending on the country where they live.

### General attitudes to sustainability

When 945 pet parents in the 4 countries were asked about sustainability in general, over a quarter (27%) considered it extremely important, nearly 1 in 4 deemed it very important (38%) and only 5% found it not important.

Yet there are different attitudes and perceptions in each country. Sustainability is the most relevant for consumers in the US, with 35% rating it as extremely important – this is 30% in the UK. Nearly half of the Canadians (47%) consider it to be very important. For the French, by contrast, just 18% see sustainability as a relevant issue.

### What sustainability represents

For more than half of pet owners (57%), sustainability is about protecting the planet – its resources and the climate. When PETS International and Yummypets asked pet owners the same question in a survey in February 2022, this figure was 46%. Ending poverty and hunger (22%), prosperity (10%) and peace (8%) follow.

51% of pet parents state that pet food being produced by an environmentally friendly company is important or extremely important to them.

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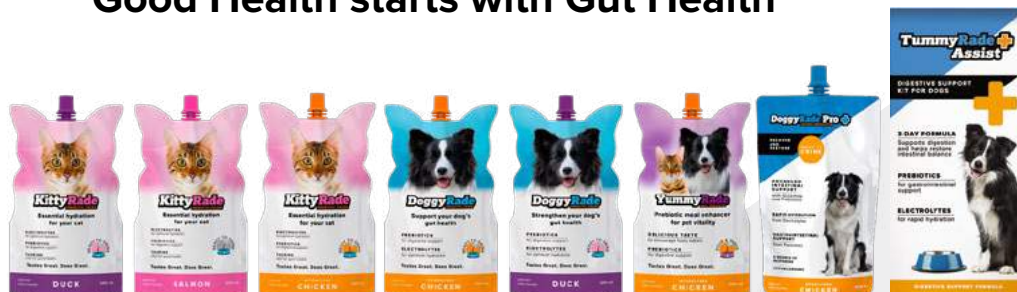


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But when asked about their feelings towards pet food companies' sustainable claims, nearly two-thirds (65%) are a bit skeptical – a dramatic increase from 41.7% back in the 2022 survey.

A huge proportion of the consumers (64%) aren't even aware of the existence of organizations like How2Recycle – a label that provides consistent and transparent on-pack disposal information to consumers in the US and Canada – or global waste management company TerraCycle.

### Does awareness lead to purchasing?

A quarter (24%) of consumers are very familiar with sustainable packaging, with nearly half (46%) buying sustainable or recyclable pet food packaging.

UK consumers, in particular, claim to be very familiar (34%) with this type of packaging. They also take the lead with more than half (57%) stating they buy sustainable or recyclable packaging. This is significantly lower in the US, with just 35% using recyclable pet food packaging. French pet owners are the least familiar with the concept, with 26% declaring themselves not familiar with it at all.

UK consumers (57%) are also the most aware of the different sustainability labels on packaging, whereas Canadian and French consumers are the least likely to be aware of this.

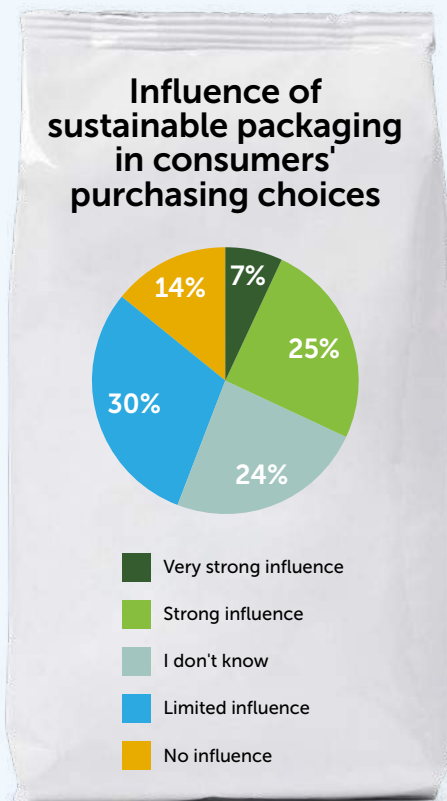
### The main drivers

According to the survey, the main driver for pet parents to buy sustainable packaging in general relates to a reduction in their environmental footprint (46%). For 21% of them, it's more about saving money, and for a similar proportion it is to do with reducing packaging volume (20%).

UK consumers are the most likely to value a reduction in their environmental footprint (54%), whereas French people are more motivated by reducing packaging volume (30%) and Americans want to cut down on food waste (16%).

As much as 44% of consumers find recyclable materials the most appealing option, followed by biodegradable materials (22%) and compostable materials (16%).

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*The survey concludes that the main motivation of a third of pet parents regarding sustainability is to reduce their environmental footprint.*

Most consumers (88%) would favor a clear label on the packaging that indicates its environmental impact score.

### Truly sustainable consumers

Despite the country differences, there is a clearly defined segment of the market which believes that sustainability is extremely important and will go to great lengths to find it. This is indicated by the consistency of their choices across the life cycle (27% of consumers).

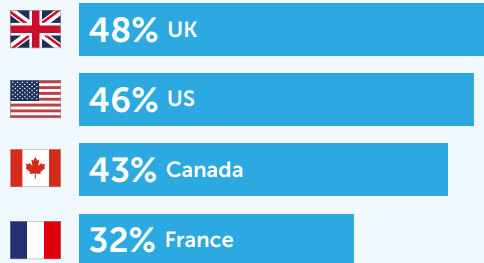
These are people who always buy organic food for themselves (65%) and as pet owners they value that pet food is manufactured by an environmentally friendly company (77%). They are also very familiar with sustainable packaging (53%) and are the ones most likely to believe packaging companies' claims (37%). More than half (55%) already buy recyclable pet food packaging.

### Educate to convince all pet parents

The PETS International and Yummypets survey concludes that the main motivation of a third of pet parents regarding sustainability is to reduce their environmental footprint. For them, sustainable packaging is a key purchasing driver when choosing pet food (86%). In fact, 21% are willing to pay more for pet food with sustainable packaging.

In light of these results, it seems that both pet food and packaging manufacturers still have a lot of work to do when it comes to consumer education, communicating the benefits of sustainable packaging and its relevance for a more sustainable future. ♦

### Proportion of pet owners willing to pay more for sustainable packaging



### Actively seeking the right packaging

When it comes to consumers' attitudes to packaging, 55% actively seek products with sustainable packaging, although only 11% always do that.

17% of UK consumers always actively seek sustainable packaging – the highest proportion at a country level. Once more, France is where the largest proportion of consumers never look for these types of products (29%).

Interestingly, for 9% of consumers in the UK and the US, sustainable packaging is a very important aspect of their purchasing decisions. However, only 11% in the UK and 13% in the US would be willing to pay more for it.

Special thanks to *Yummypets*



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# Packaging optimization for pet food manufacturers

What tactics have companies been exploring to minimize the environmental impact of their packaging while maximizing customer experience?



**Lorraine Mackiewicz**  
*Manager*  
*Clarkston Consulting*



**Reed McKenzie**  
*Senior Consultant*  
*Clarkston Consulting*

Almost 70% of pet owners worldwide express concern about climate change, and preferences for brands with ethical practices, supply chain transparency and sustainable packaging are at an all-time high. But despite global commitments and consumer demands, 99% of all pet food and treat packaging in North America goes to landfill each year, according to the Pet Sustainability Coalition.

## Redesign packaging

Manufacturers must weigh the benefits of meeting consumer expectations with the cost of switching packaging materials, as well as the impact on their supply chain, including transportation, storage and safety standards.

A common place to start when looking to optimize packaging is design. Can recyclable, upcycled or biodegradable materials replace existing materials? A design consideration is selecting materials that are both sustainable and can guarantee safety, freshness and protection of food contents.

Manufacturers who are exploring recyclable packaging materials are turning toward single-layer polyethylene – moisture resistant, lightweight and durable enough to hold larger pack sizes of food.

Sustainable dog nutrition brand Petaluma has taken its packaging a step further, by replacing the polyethylene outer layer with kraft paper. It also bakes its treats and food in a solar-powered facility and sources most of its ingredients from biodiverse and organic farms. The company is a certified B Corp, Climate Neutral Certified, and a member of 1% for the Planet.

A challenge with enforcing recyclable packaging processes is rooted in consumer behavior. Most customers don't regularly take the extra [▶ SEE NEXT PAGE](#)



## Package optimization for pet food manufacturers



step to return their empty pet food packaging to a recycling center. To combat this, brands tell consumers how they're making an impact in reducing waste and improving recycling practices.

Most importantly, they talk about the importance and value of proper recycling. Pet food giant Purina, for example, includes How2Recycle instructions on its packaging, supported by a web page with information about recycling processes.

### Promote reuse

The next level toward greater sustainability is to search for a reduction in waste, for instance reusable containers. Open Farm Pet Food sells 5 product lines through its e-commerce channel using TerraCycle's Loop platform. Loop facilitates empty container pick-up, sanitation and refill with new product at participating locations. This pilot is offered primarily for the freeze-dried raw formula, which may be easier to manage logistically than a wet food option.

A challenge for other manufacturers to consider, as it could pose barriers for consumers, is the limitation of product volume and frequency of purchases as opposed to a bulk 20 lb bag of food.

### Add refill stations

Another alternative that solves a portion of the logistical investment is to leverage existing retailer infrastructure for refills. Premium pet food company Canidae has an exclusive partnership with Petco, where kibble refilling

stations are available for consumers to fill their reusable zipper bags with food. This process has shown pet parent savings of up to 45% per pound compared with the premium pricing of single-use bags.

French manufacturer Royal Canin has partnered with RePack to deliver an on-demand, individualized nutritional program for pets in France. Packaging can be returned to local post offices for free, where it's sent back for cleaning and refilling up to 20 times. Analysis shows that the process using RePack packaging represents a CO2 reduction of 80% compared with disposable packaging.

### Reduce carbon footprint

E-commerce stores are often easier to operate than partnerships with retail locations, but they do present additional challenges for meeting sustainability goals. This is because of the added materials and risk of damages when shipping items. Packages that maximize space and minimize returns are the lynchpins of a sustainable e-commerce operation.

Utilizing 'right-fit' packaging is the easiest way to limit wasted space, decrease shipping impact and reduce the likelihood of damage. Many companies are re-evaluating the size of their packaging relative to

***E-commerce stores are often easier to operate than partnerships with retail locations.***



the content. They aim to move forward with smaller packaging models designed to reduce CO2 emissions by cutting overall transportation weight by 20-30%.

The introduction of recyclable plastic pouches will also limit unnecessary materials by right-sizing to portion size, and re-sealable zippers can help prevent food waste by enabling consumables to stay fresh for longer.

There are other packaging innovations that are designed to improve the e-commerce shipping experience. These include strong corrugated cardboard boxes or sustainable thick-paper packaging for durability, and also biodegradable or recyclable inflatable-cushion packs to fill space and limit damages. Another innovation is molded fiber packaging that uses recycled paper pulp to mold around the product, serving as a 'sustainable armor' that protects the contents.

#### A necessary strategy

Customers and governing bodies are continuing to ask manufacturers to do more to reduce their carbon

*Utilizing 'right-fit' packaging is the easiest way to limit wasted space, decrease shipping impact and reduce the likelihood of damage.*

footprint. In response, manufacturers are exploring new and sustainable options for their packaging and distribution processes, focusing on limiting waste and utilizing recyclable material.

Although it is daunting, developing a sustainable packaging and distribution plan is a necessary step to win over pet customers going forward. Companies looking to reduce their packaging impact with sustainable processes should understand the investment required and carefully develop a plan before jumping in.

Utilizing a phased approach to implementation, and fully understanding the ecosystem of impacted stakeholders – customers, suppliers and retailers – will ensure the changes being made are actually adopted and truly sustainable. ♦

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# Working towards eliminating PFAS in pet food packaging

**For some time now, manufacturers have been looking for ways to sell their products in more sustainable packaging, including reducing the use of toxic chemical compounds. What's the current state of play?**



**Muskaan Gupta**  
Associate News Editor  
GlobalPETS

One of the ways to make packaging more sustainable is to remove potentially harmful substances. Per- and polyfluoroalkyl substances (PFAS) are a large group of synthetic chemicals that have been used in consumer products around the world since the 1950s. They are sometimes referred to as 'forever chemicals' because of their persistence in the environment.

## New regulatory approaches

PFAS are used as coating or film inside food packaging to create a grease and oil-resistant barrier. But they are highly toxic to humans and animals when ingested. Global recognition of these compounds' toxicity has led to many regulatory guidelines and legislative requirements for the use of PFAS in all food packaging, including pet food.

The US Food and Drug Administration (FDA) announced in February that substances containing PFAS are no longer being sold by manufacturers into the US market

for food contact use. "This means the major source of dietary exposure to PFAS from packaging like fast-food wrappers, microwave popcorn bags, take-out paperboard containers and pet food bags is being eliminated," says the federal agency.

In Europe, there is a proposal to restrict PFAS under EU chemicals regulation. The EU's European Chemicals Agency is currently assessing the next steps to be taken.

## The wider picture

Industry insiders consulted by PETS International agree that PFAS have largely been eliminated from pet food packaging materials that are directly in contact with the food. However, they do admit that the chemicals continue to be part of packaging in traces, as ink, stickers or sealants often contain these compounds.

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***Pet food manufacturers have slowly been adopting preventive measures to cushion themselves from the impact of future bans.***





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In the US, the FDA authorizes limited use of PFAS in food packaging, but only has clear regulations for reducing the risk of any cross-contamination of PFAS with food and not for the complete packaging. Legal loopholes allow manufacturers to work with PFAS-free film or coating providers to upgrade their packaging to avoid direct food contact with the chemicals, while still having the option to not make the packaging completely PFAS-free.

A study commissioned in 2022 by the activist Environmental Working Group found that 11 bags of pet food from 7 brands in the US contained traces of PFAS, but in none of the food items had the toxic compounds migrated.

An FDA spokesperson told PETS International that current research demonstrates that the potential exposure to PFAS through the remaining limited authorized uses is “exceedingly” low. “Given that the migration potential of the substance to food is considered negligible, there are no immediate plans for the FDA to take action related to the remaining uses at this time.”

### How is the pet food industry adapting?

Despite the existing loopholes, pet food manufacturers have slowly been adopting preventive measures to cushion themselves from the impact of future bans or regulations on packaging materials. They are voluntarily removing PFAS content from their pet food packaging. A number of companies are aiming to go completely PFAS-free, some are exploring alternatives with the same benefits, while others are innovating sustainable options within PFAS-free food contact materials.

The market innovations are undoubtedly being led by two-fold demand – for both PFAS-free materials as well as sustainable and low-carbon alternatives.

### Creating alternatives

At PACK EXPO Las Vegas last September, Mitsubishi Gas Chemical debuted a PFAS-free oxygen absorber solution. The company says that the chemical compound, which is available as sachets, can remove 99.9% of oxygen from packages in 24 hours. This provides PFAS-like benefits – but without the toxicity.

It is suitable for pet treat packaging and allows manufacturers to minimize preservatives, reduce waste and improve the quality of their products.

### PFAS-free barrier papers

Earlier in 2023, flexible packaging company ProAmpac unveiled its ProActive Recyclable, a product series which includes a multi-walled paper bag for dry pet food packaging. This is formulated specifically for grease resistance without PFAS additions.

In Europe, packaging and paper group Mondi has partnered with German retailer Fressnapf to sustainably upgrade their packaging. This is done by introducing a new recyclable mono-polyethylene film coating for protection against moisture, fat and odor.

“Most of our US pet food packaging structures are already PFAS-free, while the rest are currently in transition. The roll-out and implementation of PFAS-free structures in the EU is ongoing,” says Patrick Pundsack, Technical Account Manager for Consumer Flexibles at Mondi. The British-Austrian company is closely monitoring ongoing developments and intends to be proactive in introducing PFAS-free packaging for its pet food packaging portfolio.

Similarly, Finland-based UPM Specialty Papers, in partnership with the Italian company Fiorini Packaging, started offering the European market traditional packaging solutions without PFAS chemicals in late 2023. Both companies anticipate a regulatory change in the EU that will “steer the value chain to move toward PFAS-free solutions”. UPM believes there will be demand for recyclable, fiber-based products led by “both regulation-related and brand owner sustainability-related targets”.

### Rewarding innovation

There are no set deadlines for when PFAS elimination will take place, and in what form. In the meantime, innovation will continue to be encouraged and rewarded. Helsinki-based flexible packaging player Ahlstrom was recently honored with an Innovation in Sustainability Award by The American Forest & Paper Association for its sustainable fiber-based flexible packaging PawPrint. ♦





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# Technology that improves pet food safety and quality

Vacuum coating plays a crucial role in preventing recontamination by pathogens such as Salmonella.



**Peter Raeven**

*Vacuum Coating Specialist, Pet Food  
Dinnissen Process Technology  
dinnissen.com*

In pet food production, achieving the highest standards of product safety and quality is paramount. The focus on eradicating contamination risks, especially from pathogens like Salmonella, has led to innovative approaches in production processes.

## Hygiene at every stage

A significant evolution in these processes is the shift to vacuum coating technologies in the final stages of production. Prior stages, such as extrusion and drying, use high pressure, temperature and time to eliminate Salmonella.

However, given the risk of recontamination, it is crucial to maintain hygiene in subsequent process steps, which often involve the addition of nutrients and liquids through vacuum coating technology.

## 80% more nutrient enrichment

Vacuum coating has revolutionized the way pet food is enriched. This technology allows healthy oils and fatty acids, such as omega 3 and 6, to penetrate each piece of kibble.

The kibble is mixed under a vacuum, and fats and other nutrients are sprayed on. When the vacuum is released, these additives go deep into the core of the kibble.

After this nutritious infusion, a slurry layer can be used to enhance aroma and taste, making the kibble irresistible to pets. To prevent potential stickiness from the slurry, a powder coating may be applied, yielding a final product that is both dry and strong.

Previously, enriching kibbles with oils and fatty acids was impractical due to absorption limits. With vacuum coating, up to 80% more of these vital nutrients can be integrated into every kibble.

## Innovations in vacuum coating

Preventing recontamination demands strict hygiene measures. Fortunately, recent years have brought about significant innovations in hygienic mixing and vacuum coating. The latest systems incorporate features specifically designed to prevent Salmonella growth, including body heating, hot and clean air injection systems, and clean-in-place (CIP) systems. These allow the equipment to be thoroughly sanitized without the need for disassembly. That maintains the highest standards of hygiene and safety in pet food production while minimizing downtime and operational disruptions.

## Best of both worlds

Everyone wants the best for their pet. So each kibble must be perfectly safe and full of healthy nutrients, vitamins and minerals. Vacuum coating technology offers producers the best of both worlds: pet food full of essential fats and flavors without a greasy residue and – even more important – pet food that is safe from pathogens such as Salmonella. ♦





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# Pet product online sales from a Chinese perspective

China's e-commerce giant Alibaba is witnessing continuing expansion in pet supplies marketing via different online channels – including its own, Tmall.



**Elise Xin Guo**

*Head of Business Development, Pet Tmall Global-Alibaba Group*

Launched in 2008, Alibaba's Tmall serves as a platform for consumers in China and overseas where they can buy both home-grown and international branded products, as well as products not available in traditional retail outlets. A large number of international and Chinese brands and retailers have opened storefronts on Tmall.

## Robust demand for food

Wet, freeze-dried and functional food, plus pet supplements, are fast-growing categories on Tmall Global, with many successful international brands represented. During the 2022 edition of the Double 11 online shopping festival, the largest e-commerce

event in China, imported pet food grew much faster than non-imported products – despite often being 50% more expensive than national brands.

At present, China has more than 70 million pet owners and the total number of pet dogs and cats exceeds 100 million. At the same time, the average annual consumption basket for pets continues to increase. It hit ¥2,216.3 (\$306.62/€283.49) in 2021 and is expected to reach ¥3,500 (\$484.21/€447.69) by 2025.

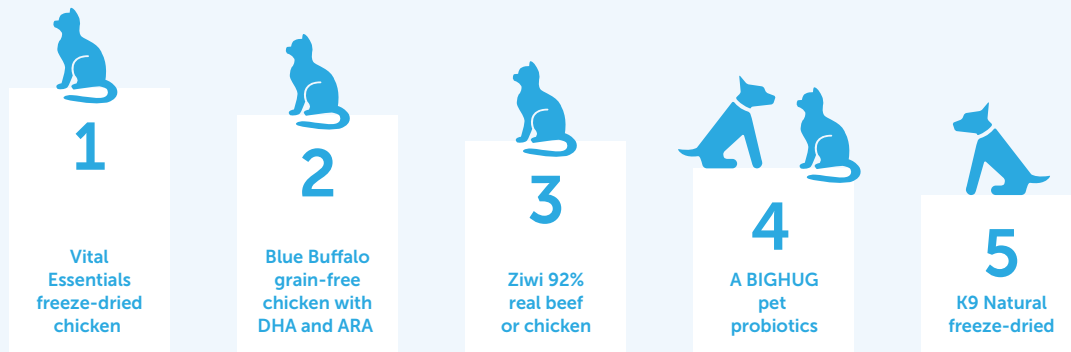
## Special diets and health products

The global pet food industry is increasingly focused on meeting the special dietary needs of pets. As a result, there are many different types of pet food on the Chinese market too. This includes grain-free products and hypoallergenic formulations, as well as high protein and low-fat foods.

[▶ SEE NEXT PAGE](#)



## Top 5 performing pet food brands on Alibaba



Source: Alibaba-Tmall, April-September 2023

Tmall Global is also expanding its range of pet health products, including nutritional creams, calcium tablets, hair cream and even sheep milk powder. All the most popular items come from official online brand stores, which helps to build the trust needed for pet owners to use the flagship stores on e-commerce platforms such as Tmall.

### Rising sales of smart fountains

The pet supply industry in China is forecast to reach ¥50 billion (\$6.92B/€6.39B) by next year. Increasing numbers of pet owners, and the pet-related behavior and lifestyles of the younger generation, are catalysts for the development of intelligent supplies. Drinking fountains, safety cameras and automatic feeders are some of the many new products on the market.

Pet parent preferences for smart supplies are seen mainly with regard to their pet's food, housing and entertainment. Between April and September 2023, 63% of Tmall customers buying pet supplies also purchased a smart drinking fountain.

Other popular products on the platform are quilts, dryers and electric blankets for kennels, plus other products designed to enhance a pet's comfort. At the same time, training and monitoring products are now attracting a lot of pet consumer interest on Tmall. The demand for smart supplies has noticeably shifted from simple diet concerns to more extensive health monitoring.

The trend toward digitalization and intelligent upgrading is certainly the future of product development in China's pet sector, and players such as tech giant Xiaomi, electrical appliance producer Midea and consumer electronics brand Haier have recently ventured into the industry.

### Rapid growth of e-commerce

E-commerce platforms are the preferred purchasing channel for pet owners in China, followed by veterinary clinics and specialist pet stores. As of July 2022, pet food sales on Alibaba's Taobao and Tmall platforms reached ¥24.76 billion (\$3.42B/€3.17B).

Financial services multinational Deloitte predicts that e-commerce channel sales within China's pet food industry will reach 72% by 2026, a 21% increase.

### Self-operated stores

In addition to opening official flagship stores on e-commerce platforms, brands can also sell their products through self-operated stores – the so-called supplier model – and leverage other distribution channels.

***Pet parent preferences for smart supplies are seen mainly with regard to their pet's food, housing and entertainment.***



*At present, China has more than 70 million pet owners, and the total number of pet dogs and cats exceeds 100 million*

One example is Tao Fen Xiao, an Alibaba distribution platform that helps brands or suppliers to build, manage and operate their online sales by introducing other merchants who can sell their products.

### The role of social media

In China, e-commerce platforms and short video platforms are the main channels where consumers can obtain information about pet food. With the rise of platforms like TikTok and Instagram Reels during and after the pandemic, internet users have been bombarded with video content more than ever before.

Advertising on social media can be very effective in terms of reaching, informing and influencing the consumer. With the introduction in recent years of short video platforms such as Douyin – the TikTok application for China – and XiaoHongshu, which has been described as ‘China’s answer to Instagram’, as well as other lifestyle social media, pet food players have gained a new brand-building channel.

### More marketing methods

The ways to advertise your brand are now endless – in China too – and include brand endorsement, variety sponsorship, joint games and other pan-entertainment options, to name just a few of the most important marketing opportunities now available. ♦



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# How pet suppliers can improve their profit margins with Amazon

Successful e-commerce using the tech giant requires a carefully planned long-term strategy. That means looking at the benefits for each product you sell on the platform.



**Martin Heubel**  
*E-commerce Strategy Consultant*  
*Consulterce*

Amazon has introduced a rigorous margin focus for companies operating as their wholesale suppliers (the so-called first-party or '1P' suppliers). The result is tense retail negotiations and an increasing number of cost price reductions and cost support requests that are squeezing the bottom line of manufacturers, large and small.

Unsurprisingly, 57% of 1P suppliers say they are having more difficult trade negotiations with Amazon compared with last year, according to recent research.

## Locating the cause of low margins

It's no secret that tech companies are focused on profit margins right now. And Amazon is no different.

The e-commerce giant increased its operating income by a staggering 202% in 2023. For its retail division, earnings before interest and taxes increased by an estimated 102%.

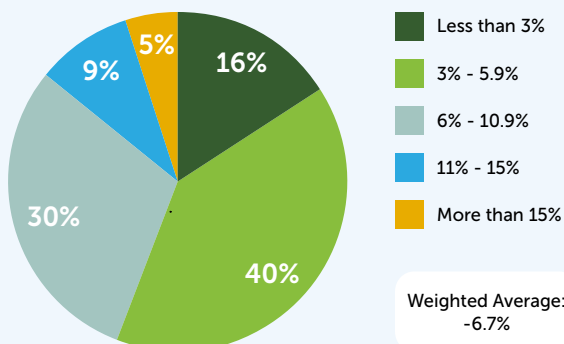
You could point fingers and say that Amazon is the bad guy among online retailers. But when Amazon Vendor Managers ask for margin improvements from suppliers, it's often due more to structural defects than appears at first glance.

[▶ SEE NEXT PAGE](#)





## Cost decrease request by Amazon to consumer brands



Source: Stratably x Conslterce Annual Vendor Negotiations (AVN) benchmark (January 2024, n=100)

Manufacturers might not want to hear this, but low selling prices, suppressed offers or the delisting of products are all symptoms of a failed Amazon strategy. They originate from the fact that most brands – in the pet sector, too – treat Amazon like any other retailer, often because of organizational legacy and fractional profit and loss (P&L) ownership structures. This means that different functions in an organization own only part of the customer P&L, but none of them has a 360-degree overview of the total cost-to-serve for Amazon.

### Look beyond the short term

Some businesses plan their investments with a relatively short-term 12-month horizon, listing products initially designed for the physical shelf and leaving the commercial account ownership to their local teams.

This lack of distribution control leads Amazon to source products from EU markets with the lowest cost, price-matching competing retailers, and undermining the brand's distribution set-up and price positioning.

Margin challenges tend to be considered one-off issues that can be addressed by investing in cost price reduction or trade terms support. This lets you approach the investment ceiling with no real strategy to address the underlying lack of distribution and assortment control that caused the weak margin position in the first place.

To escape this vicious cycle, leadership teams must realize that most of the Amazon margin challenges are structural. So brands must start focusing on the long-term development of their Amazon business.

### Focus on key areas

Improving vendor margins requires a focus on 2 key areas: distribution control and channel-specific assortment. This requires careful planning that goes beyond the short term. And it must be coordinated at a regional level to ensure that it doesn't undermine trade across markets.

### Distribution control

Amazon is a price follower, selling products at high discounts to wholesalers and distributors, who may be selling on Amazon. This creates a downward spiral in price that increases the pressure on a brand's price positioning. That's because Amazon reflects the brand's distribution strategy.

You can address this issue by reviewing existing incentive structures with trade customers who may purchase larger volumes than Amazon. But more

***Low selling prices, suppressed offers or the delisting of products are all symptoms of a failed Amazon strategy.***



realistically, vendors need to create a clear framework for deciding which products they list on Amazon in the first place. While having every product listed on Amazon can be tempting, it's a surefire way to lose the battle for healthier vendor margins.

Instead, you need to think of the role of each item you list with Amazon. Will it drive new customers to your brand? Is it intended as a loss leader? Or is its role to improve the margin mix of your Amazon portfolio? If you're unclear about the role of the products you list with Amazon, they probably shouldn't be listed in the first place. This approach is a good indicator to evaluate whether your commercial ambitions and growth activation strategies align with each other.

### Channel-specific selection

It's no secret that most brands automatically list their offline retailer selection with Amazon. The problem is that these products were designed to appeal to shoppers on the physical shelf in an in-store environment. That is achieved with oversized product packaging or premium packaging material that is more expensive to ship when sold online.

As customers make their purchasing decisions based on the content of the product detail page on Amazon, pet suppliers can realize cost savings by developing compressed, channel-optimized packaging that reduces packaging waste, storage and shipping costs for them and Amazon.

### Action vs inaction

In February, the e-commerce giant launched an initiative to offer discounts to third-party sellers (known as '3P') for products that can be shipped in their own packaging. This offers 1P vendors the opportunity to request a similar discount for qualifying items as part of their annual vendor negotiations.

But what about the steep upfront costs to develop this channel-exclusive packaging? Pet firms are advised to factor in the opportunity cost of inaction: not launching efficient online packaging increases the pressure on vendor margins for Amazon. And it will lead Vendor Managers to request investments in cost support, higher trade terms or cost price decreases with no real value exchange for the brand. ♦

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# Balancing sustainability and pet trends

Sanicat is a leading brand in cat products and dedicated to sustainability. Discover how its proactive approach to eco-friendly solutions harmonizes with changes in the human-cat relationship.



**Anna Toniutti**  
*Pet Care Marketing Director*  
*Sanicat*  
*sanicat.com*

## Evolving family dynamics

Global findings from Euromonitor International's Voice of the Consumer lifestyles survey show that as many as 75% of pet owners now see pets as members of their family.

There is also a notable shift in family dynamics, with an increasing number of households opting for cat ownership over raising children. In Spain, for example, currently more households have pets than children under the age of 15, according to data from ANFAAC, the national association of pet food manufacturers.

Maintaining a clean living environment in pet-owning households is crucial. Sanicat provides mineral and plant-based solutions that not only ensure cleanliness, but also foster a healthy environment for all family members.

## Repurposed waste materials

Sanicat's mission is to cater to the needs of this growing group of dedicated pet parents, but always in a responsible way. Opting for solutions that use renewable raw materials, with environmentally friendly manufacturing processes and sustainable packaging, contributes significantly to the reduction of an environmental footprint and conservation of shared natural resources.

The brand has reaffirmed its commitment to sustainability through a range of litters designed to recreate the natural environment of the cat. Natura Activa, for example, is a plant-based product range. Last year, Sanicat 100% Green and Sanicat Recycled were added to this line – natural, recycled, biodegradable and compostable litters.

Sanicat uses independently certified materials repurposed from waste from other sectors, such as construction, packaging and agriculture, without compromising on quality and safety. The eco-friendly packaging is made from FSC-certified cardboard and paper and entirely free of plastic. Opting for products within this range integrates sustainability into the pet-owner lifestyle.

## Building on its experience

With over 65 years of expertise, Sanicat strives to meet today's consumer demands and each pet's specific needs. This year's Interzoo launches reflect that once again.

The line-up features Strong Clumps and Easy + GO, ultra-clumping litters for excellent hygiene and odor control. Then there's Kitten litter, with a gentle valerian scent for easy training, and Multicat, with superior odor control – ideal for homes with more than one pet. ♦

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**Interzoo 2024**





# A snapshot of the German e-commerce market

**Despite a tough year in 2023, the 5-year online growth forecast is positive for Germany's pet supplies category. We take a look at the changing market dynamics.**



**Martin Gross-Albenhausen**  
*Managing Director - German E-Commerce  
and Distance Selling Trade Association (bevh)*

Last year was a tough one for German e-commerce. Despite showing good performance in the first half of the year, the pet food and pet supplies industry was not able to buck the downward trend. As a result, the gross merchandise volume of pet supplies fell by 4.2% to €1.78 billion (\$1.95B) overall.

## Online sales expected to grow

Nevertheless, this downturn was significantly lower than the drop in total online order sales made by German consumers, which declined by 11.8% to €79.7 billion (\$87.2B). In fact, pet supplies are considered to be one of the e-commerce categories that will continue to grow over the next 5 years. This is despite the sector's rapid growth during the pandemic, equating to a 45.4% increase in total volume since 2019.

A closer look at the past year on a quarter-by-quarter basis reveals that sales in the third quarter rose to their highest level ever at €498 million (\$545M). Unlike for most other product groups, the third quarter has always been much more important for online pet supplies than the holiday season in the fourth quarter.

## Concentration of players

Despite the rapid growth in recent years, there have been winners and losers. When it comes to German consumers' online buying preferences for pet supplies, purchases through online marketplaces have increased the most and now account for more than every second order in this online segment. This growth has been at the expense of internet pure players in particular.

There are signs of considerable concentration in the e-commerce sector. In February, the multichannel retailer Fressnapf announced it had achieved online growth of around 20% to

[► SEE NEXT PAGE](#)



almost €400 million (\$437M) in 2023. However, these sales relate to all countries in which the company is active online. Therefore, it equates to only around 20% of what the pure online retailer Zooplus achieved globally in the year of its delisting from the stock exchange (2021/22).

These 2 retailers are likely to account for more than a third – if not almost half – of the entire online pet supplies trade in Germany. Their success is buoyed by the fact that Das Futterhaus, Fressnapf's main bricks-and-mortar competitor, has so far not engaged in online trading.

The German e-commerce market is characterized by a very large number of smaller players, and the pet sector is no exception. For example, there are long-established mail order companies such as Schecker, Clevercat, Alsa Hundewelt and M&S Reptilien.

Above all, however, more and more suppliers of pet food and supplements are entering the online market. Reliable and fast deliveries also allow frozen raw food to be purchased from online butchers, such as Frostfutter Perleberg or Frostfutter Plauen. The German market is even large enough for suppliers of frozen food for fish or reptiles.

### Reliability and speed

While reliable delivery is one of the levers for success, speed seems to be even more important to customers looking to buy pet supplies online. While only 4.9% of

***While reliable delivery is one lever for success, speed seems to be even more important to customers looking to buy pet supplies online.***

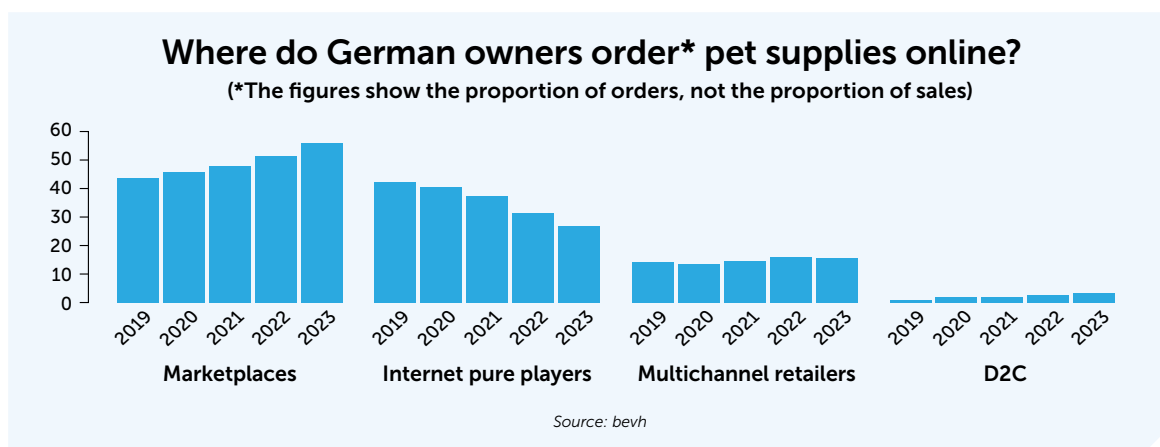
the German population as a whole say they regularly order from fast delivery services such as Flink or Getir, the proportion of buyers of pet supplies and pet food is almost twice as high at 8.6%.

This is according to survey by the German industry body of online and mail order retailers bevh among 2,500 online shoppers carried out between April and June 2023.

### Rise of direct-to-consumer

Although they still only account for a small percentage of the market, the dynamic growth of direct-to-consumer (D2C) providers is striking. These are companies that manufacture products themselves (or have them produced as private label) and sell them directly to end customers. If orders placed with manufacturers and producers who sell exclusively via marketplaces were included in the table, the percentage of D2C orders would probably be even higher.

One example of a hybrid approach is AlphaPet Ventures. The company, which was originally formed by the merger of 2 online providers, acquires manufacturer brands. If a product launch proves successful in direct online sales, the product is often subsequently sold via bricks-and-mortar retailers too.





### Subscription models

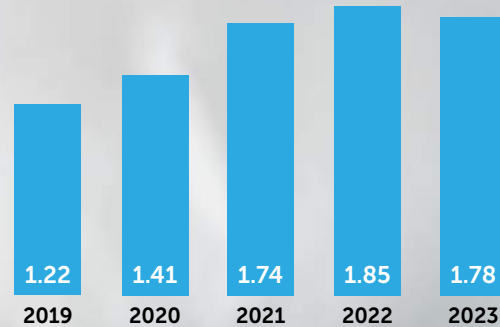
Pet food subscriptions are seen by many as another key lever for growth. In Germany, they are currently offered by Amazon in addition to the 'top dogs' Zooplus and Fressnapf.

However, successful long-term e-commerce businesses have only been built exclusively on subscription models in a few cases. This is because customers primarily opt for subscription models because of the financial benefits and to avoid the inconvenience of going shopping.

One of the disadvantages for e-commerce players is that heavy bags of pet food incur high transport and logistics costs. Additionally, subscription models remove the chance for consumers to make impulse purchases when browsing the online range. Fressnapf has therefore recently entered the market with a 'surprise box' for dogs and cats. It is easier to handle, plus includes product samples that create the opportunity to generate new sales. ♦

### Online pet supplies sales

(in Germany, in billion €)



Source: bevh



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# Online pet food shopping trends around the world

**Why do consumers buy pet food online? Which types of delivery services most appeal to them? And how do preferences vary between Europe, North America and South America?**



**Shruti Khairnar**  
*Associate Business News Editor*  
*GlobalPETS*

How is the digital transformation affecting pet food buying habits across the globe? A survey by Explorer, the Yummypets market research platform, gathered data from pet parents in the UK, France, Brazil and North America in late 2023, which helps us to form a picture.

## Reasons to go online

Among the respondents, there was a more or less an even split between dog owners and cat owners, except for in Brazil (63% cat parents vs 37% dog parents). We've analyzed the survey's findings to identify the similarities and differences in consumer behavior in the various regions.

On average, US pet owners said they shopped online for pet food as it saved them a trip to the store (65%), ultimately saving them time (55%) and helping them find better prices (56%). Similar to US pet parents, 61% of Canadian respondents said they mainly chose to buy pet food online as it saved them a trip to the store, while for 54% it was a time-saver and almost half (49%) believed they found better prices online.

The outlook of British pet parents was not so different, with 58% saying it saved them a trip to the store. Interestingly, better prices online (58%) ranked considerably higher for them than saving time (44%). Likewise, better prices were a much stronger reason for buying pet food via the internet for Brazilian consumers (73%) and French consumers (60%) than time savings (57% and 47%, respectively).

[▶ SEE NEXT PAGE](#)



***The survey effectively demonstrates that, across the Western world, pet parents are pressed for time.***

Opinions differed on whether websites offered a greater choice of products. In the US, UK, France and Brazil, roughly 4 in 10 pet parents stated this as a reason for buying pet food online. In Canada, however, only 29% thought there were more products available online.

It is a commonly held belief in e-commerce that speed of delivery matters. This seems to hold true to some extent in Brazil (49%), US (45%), UK (44%) and Canada, where around 4 out of 10 pet parents bought online because of fast delivery. In France, however, quick delivery was less of a reason for pet parents to buy online (36%).

### Specialized vs general retail platforms

Specialized purchasing platforms or websites, such as pet shops or vet clinics, were by far most popular among pet parents in Brazil (89%) and France (more than 80%). Fewer respondents opted for general platforms like Amazon (36% in Brazil, 22% in France), and supermarket websites hardly featured (22% in Brazil and just 13% in France).

In the UK, the figures were a little less extreme, although more respondents still chose specialized platforms as their main go-to websites for buying pet food (70%), with 54% choosing general platforms like Amazon and 39% opting for supermarket websites.

Specialized platforms were out in front in the US too, with 63% of the respondents mainly relying on them, while 54% used a general platform such as Amazon, and 41% went to supermarket websites such as Walmart and Target.

In a departure from the clear trend seen in other countries, Canadian pet parents were more evenly split with 50% opting for specialized pet platforms and 50% shopping for pet food on general websites like Amazon. However, grocery retailers in Canada are lagging behind their US peers, with only 23% of respondents saying they used supermarket websites to buy pet food.

### Home deliveries reign supreme

Home delivery and pick-up services stood out strongly as the most popular service, with more than 9 out of 10 pet parents in all 5 countries choosing these as their preferred pet food delivery methods. Drive-thru or click & collect services achieved the highest second-place rankings in the US and Canada.

### Where did dog and cat owners buy the most pet food online in 2023?



**chewy**



**Pets at Home**



**zooplus**



**PETSMART**



**petlove**

Source: Explorer/Yummypets, December 2023





Interestingly, in those 2 countries, more dog owners than cat owners chose this option (23% dog owners vs 16% cat owners in the US, and 18% dog owners vs 13% cat owners in Canada). In France, Brazil and the UK, drive-thru or click & collect services were more popular among cat owners, although they were not chosen by more than 15% of cat parents in each case.

### Local players dominate

Zooplus was the only specialized retail platform that ranked highly in more than 1 surveyed country (UK and France). Zooplus was followed by Maxi Zoo and Zoomalia in France, whereas the favorite specialized platform in the UK was Pets at Home.

Out of all the retailers mentioned, Chewy, PetSmart and Petco were the top 3 choices for both dog and cat parents in the US. In Canada, the most popular specialized websites were PetSmart and Pet Valu. Meanwhile, Petlove and Petz were the most preferred specialized platforms chosen by Brazilian pet parents.

### Offer convenience at an attractive price

The survey effectively demonstrates that, across the Western world, pet parents are pressed for time and are opting to shop for pet food through e-commerce channels for 3 main reasons: to avoid a trip to the store, to save time and to save money by finding better deals on products online.

While quick deliveries and a wider product range seem in the 'nice to have' column, pet parents are generally more likely to be driven by the desire for convenience and cost-effectiveness.

To appeal to consumers, websites should ideally meet basic need at an attractive price – and preferably deliver the product to the pet parent's doorstep. ♦

*Similar to US pet parents, 61% of Canadian respondents said they mainly chose to buy pet food online as it saved them a trip to the store.*



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# Accelerators: driving the industry forwards

Venture capitalists and other strategic players are pivotal catalysts for progress in the pet industry, helping budding companies to get a headstart in today's very competitive market.



**David Palacios Rubio**

*Head of Editorial  
GlobalPETS*



**Muskaan Gupta**

*Associate News Editor  
GlobalPETS*

Start-ups play a key role in driving innovation in all industries, and the pet care sector is no exception. So, what do pet industry accelerators offer in terms of funding, tools and opportunities? And which trends or areas offer the most interesting growth prospects?

## Tailored content

The main role of accelerators is to provide the necessary support to companies aiming to scale their ventures. Depending on the specific needs, most accelerator programs provide mentorship from industry entrepreneurs as well as executives working at consumer packaged goods (CPG) companies, retailers and investment firms.

SKU is a CPG accelerator that made a foray into the pet industry with a 12-week program in 2023. The SKU program provides participants with key insights about exports, direct-to-consumer (DTC), logistics, financial planning and branding, among other things. The accelerator also helps companies in

their preparation for pitching to investors by aiding with crafting storylines, refining decks and enhancing their delivery skills.

"The teams are supported by a group of 6 to 8 mentors, each bringing a distinct background and experience, collaborating with the founder throughout a 12-week program," says Buff Greebe, Executive Director at SKU.

Rachel Sheppard, Director at Leap Venture Studio program, highlights the opportunity of offering 'tailored content' to address the unique needs of participating companies. "Through our accelerator, companies receive personalized support to scale their ventures. Tailoring our approach to the unique needs of each founder, we provide hands-on guidance to overcome challenges," she tells PETS International.

## Increasing popularity

The popularity of accelerator programs has increased in recent times, especially from pet care start-ups that want to receive financial help to boost their business.

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***The popularity of accelerator programs has increased, especially from pet care start-ups that want to receive financial help to boost their business.***





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Interzoo: Hall 4, Booth 4-210

**Rinaldo Franco Spa**  
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## IPV Pack S.r.l. Unipersonale ITALY IPV PACK: new headquarters and an increasingly international future

Since 2004, IPV PACK has continued its expansion to be an increasing point of reference in Italy and abroad for the production and processing of high-quality packaging materials in the pet food, as well as the food and industrial, sectors.

To meet its mission, in 2024 it inaugurated its new headquarters which, together with the pre-existing production facilities in Italy and Serbia, means it now has a total surface area of 29,000 sq m and a workforce of 125.

The sites represent 2 centers of excellence for the development of constantly updated solutions to guarantee its customers a wide range of packaging customized in every detail.

IPV PACK constantly invests in new technologies to offer solutions that can make a difference in the pet food market. Today more than ever its motto is: 'Full speed ahead'!

Interzoo: Hall 4A, Booth 4A-230

**IPV Pack S.r.l. Unipersonale**  
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"We have observed significant interest from pet care start-ups eager to join an accelerator program, whether it's independently operated, or sponsored and managed by venture arms of established industry players," states Greebe.

Similarly, Mars Petcare's Leap Venture Studio, launched in 2018, has experienced a consistent upward trend in applications over the past years. The program offers participants capital worth \$200,000 (€184,833).

### The average profile

Companies joining the accelerator programs are not just operating in the pet food segment, but also in areas such as toys, luxury accessories, apparel and tech. According to SKU, the revenue of applicants typically ranges between \$50,000 (€46,000) and \$5 million (€4.6M). While SKU is mainly focused on the US market, Greebe says that it regularly receives applications from European and Latin American pet companies that either want to enter the US or already have an established footprint in the market. To date, Mars Petcare's accelerator program has supported 45 companies from 15 different countries.

### Setting benchmarks for success

Greebe says that many pet companies that participated in the program are already on the road to success and are attracting substantial interest from both venture capitalists and strategic players.

For example, Innovative Pet Lab (IPL), an American company offering advanced health screening tests for pets, has grown its revenue by 44% after it participated in the SKU cohort in 2023.

"We've seen tremendous growth in new partnerships, email campaign conversions and improved user experiences, as well as paid social media conversions. The accelerator helped us set benchmarks for success in these areas as well as strategies for future success," says company CEO Jamie Smith.

As from this year, IPL's products are also available via Amazon and Chewy. "Without our accelerator program, this would have taken much longer to accomplish. They opened doors with warm introductions that were invaluable," adds Smith.

***Many pet companies that participated in the program are on the road to success and attracting substantial interest from venture capitalists and strategic players.***

### Fostering innovation

Egyptian pet care company Vetwork has also benefitted from its participation in multiple accelerator programs between 2019 and 2023, including by Google, Microsoft and Unleashed from Purina Accelerator Lab. "The educational component was invaluable for my team and me, and the networking opportunities were the most impactful," says founder and CEO Fady Azzouny. In his view, pet industry accelerators play a "crucial role" in fostering innovation.

### Bright prospects

Greebe forecasts a bright and booming future for pet industry accelerator programs. "In the current competitive landscape, marked by more stringent access to venture capital, accelerators like SKU are actively seeking start-ups that introduce transformative products to the pet care sector or pioneer new categories."

Smith draws attention to the chance for accelerators to innovate by focusing on specific niches within the pet care market, rather than just having tracks for the general pet industry: "I look forward to more organizations providing these types of opportunities to pet care companies."

### Accelerator programs in 2024

Most of the annual pet accelerator programs started in March. The 8th annual pet care accelerator by Leap Ventures attracted more than 200 applications from 42 countries. Just 6 start-ups from around the world – all operating in the pet health sector – were accepted for this year's 12-week program.

Unleashed by Purina is currently underway with a total of 8 participating companies. It has a similarly international flavor, with participants coming from the UK, France, Greece, Austria, Singapore, Canada, Brazil and Mexico.

SKU's 2024 accelerator program also has 8 participants, including Wellnergy Pets offering wellness products. A second program will run from August to November. ♦



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## Beyond the bowl: Tribal Pet Foods' quest for superior pet health

Founded by an Oxford-educated chemist, Tribal Pet Foods pioneers the integration of high-quality, minimally processed ingredients into pet diets, setting new industry standards.

The health and nutrition of pets are more important to owners than ever before.

Tribal Pet Foods is founded on the belief that pets should enjoy the same quality of nutrition as humans. This belief is underpinned by the understanding that the way food is processed can significantly impact its nutritional value.

Consequently, the company's dedication to natural pet foods is evident in its product range, which emphasizes high-quality, fresh ingredients and minimal processing. This ensures that pets receive the essential nutrients needed for optimal health.

The product line-up is tailored to meet the varied needs of pets and includes:

- **Cold Pressed Dry Dog Food:** Tribal introduced the world's first cold pressed dog food made with fresh meat and free from meat meal. This method preserves more natural nutrients than traditional extruded products

- **80% Meat Wet Food Sausage:** These gourmet sausages for dogs are made from the finest ingredients and steamed to perfection, preserving both flavor and nutritional value

- **Air Dried Training Treats:** Soft, meaty and deliciously tasty, these air-dried soft treats are made with 70% fresh meat or fish, and superfoods such as quinoa, blackberries, blueberries and cranberries

- **Dental Sticks with Added PhytoDent™:** Dental sticks with a unique seaweed complex to support oral health, reduce plaque and promote gum health

### Sustainability and future plans

Sustainability is central to Tribal Pet Foods' mission. The company demonstrates its environmental commitment through 100% recyclable packaging and responsible ingredient sourcing. Its dedication to sustainability extends beyond products to its operations, aiming for a positive planetary and community impact.

Looking ahead, Tribal Pet Foods is focused on expanding its product range and global reach. The company remains committed to innovation, exploring new formulations and technologies to improve pet health and well-being. Its growth is guided by a steadfast commitment to sustainability, ensuring a positive contribution to the global community.

Tribal Pet Foods represents a movement towards improved, sustainable pet nutrition, inviting trade buyers and industry partners to participate in this transformative journey. This mission ensures pets worldwide achieve the highest standards of health and happiness. ♦

**Interzoo: Hall 9, Booth 9-603c**

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# US will not impose tariffs on imported tin mill steel

**A recent decision safeguards canned pet food from a price increase – and the industry breathes a sigh of relief.**



**David Palacios**  
*Head of Editorial*  
*GlobalPETS*

The United States International Trade Commission (USITC) has ruled against imposing tariffs on imported tin mill steel, the metal widely used in cans for various industries, including pet food. This means that no anti-dumping duties will be applied to any country.

## Anti-dumping tariffs

The decision in February came after steel producer Cleveland-Cliffs and the United Steelworkers union had filed a petition with the US Department of Commerce (DOC), the International Trade Administration and the USITC to impose anti-dumping tariffs as high as 294% to safeguard local tin mill producers.

That would have affected imports from Canada, China, Germany, the Netherlands, South Korea, Taiwan, Turkey and the UK.

For the Pet Food Institute (PFI), this decision is a “victory” for consumers and the pet food industry. “The USITC’s 0-4 unanimous vote against the tariffs, in conjunction with the DOC’s final duty determination in January, protects 40,000 US manufacturing jobs and prevents up to 30% consumer price increases on canned goods,” says PFI president Dana Brooks.

According to PFI, the trade association representing the country’s pet food and treat manufacturers, in 2022 around 62% of the tinplate steel used by US pet food manufacturers was imported.

## What was overturned?

The DOC had determined at the beginning of the year that Canada, China, Germany and the Republic of Korea would have to pay anti-dumping duties on tin mill steel imports. German, Canadian and South Korean tin mill steel suppliers would have to pay tariffs of 6.88%, 5.27% and 2.69% respectively, while Chinese tin mill imports were subjected to a 122.52% tariff. The Netherlands, Taiwan, Turkey and the UK were released from investigations after their trade dumping calculations were found to be non-invasive.

## Avoiding a pet food price hike

The initial 300% tariff requested by Cleveland-Cliffs would have obliged companies in various sectors – including pet players – to put their prices up.

The Consumer Brands Association estimated that the cost of canned food and products could have increased by 19-30% if the new tariff had received the green light from Washington. Experts agree that the additional cost would have been mainly transferred to the end consumer – adding \$0.36-0.58 cents (€0.33-0.53 cents) more per can across all food categories. ♦



# What data tells us about the trajectory of pet food launches



**Recent analysis of global and regional trends provides valuable insight into manufacturer activity before, during and since the pandemic.**



**Kate Vlietstra**  
*Director*  
*Mintel Food & Drink*

Over the past decade, global pet food launches marked as 'new' have steadily declined, data sourced from Mintel GNPD (Global New Products Database) and Mintel Leap, Mintel's generative AI tool highlights.

## Range extensions and packaging

The definition of a new launch is an entirely novel product as opposed to a new flavor, new packaging and so on. These accounted for more than half of all pet food launches in 2014, but dropped to around a third of the launches in 2023.

Shoppers are now being offered a greater array of new varieties, with those increasing from a quarter of total global launches in 2014 to some 40% of launches in 2023. Launches with redesigned packaging have seen a slight increase over the past few years, from 13% of

the pet food launches globally in 2014 to 18% in 2023. In Europe, the increase was more considerable – from 9% to 20% in the same period.

## General category trends

There is very little difference between cat and dog product launches in terms of the type of launch. And the general trends are seen across the whole pet food category – wet food, dry food and treats.

## Pandemic-related drop-offs

New product launches were already declining before the pandemic, but Mintel has identified a sharp drop-off of pure innovation between 2020 and 2021. This was particularly evident in Europe with a sudden decrease in that period from 41% to 34%.

## Innovation across APAC

While the global pet market has witnessed a slump in entirely new innovation, things are looking a lot more exciting for pets in the Asia-Pacific (APAC)



region, where there's been a surge of new product development in recent years, including during the pandemic. According to Mintel's research, about half of launches during 2020-2021 were of completely new products.

Gut health, in particular, has been put in the spotlight, as prebiotic and probiotic claims are seen more in the APAC region. There is also a focus on the composition of pet products, as consumers look for cleaner formulations. This has sparked a growth in 'no additives or preservatives' claims.

South Korea is proving to be the star innovator, accounting for 1 in 5 (17%) new products launched in the region over the past 5 years. Alternative proteins feature in some of the more interesting recent product launches, such as brands that contain soldier fly, for example, which is high in protein, minerals, vitamins, essential amino acids and fiber.

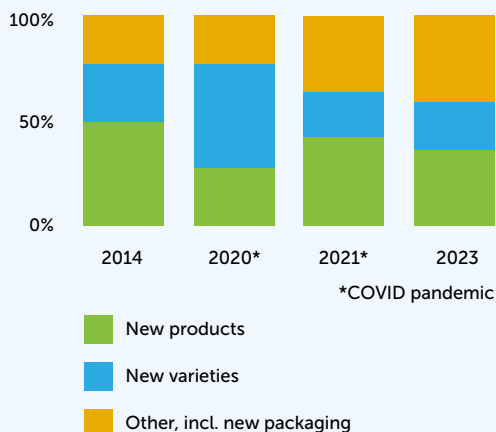
China and Japan were similarly active in new product launches, with 14% and 12% respectively.

### Cost-of-living crisis impacts Europe

Pet food shoppers in Europe have witnessed the biggest slump in true innovation. Launches marked as new products have dramatically declined, from two-thirds (66%) of launches in 2014 to just a third (32%) of launches in 2023.

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### Global pet food launches



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The greatest amount of new product activity was in the UK, which accounts for 1 in 10 European launches over the past 5 years. Here, the cost-of-living crisis has impacted consumer budgets, leading to a definite increase in trading down. Across Europe, many consumers – in attempts to save money – have switched to own-label pet food, cheaper brands of pet food or a cheaper retailer.

Other countries leading in new European product launches are Germany (9.5%) and France (7%). Much of the innovation in Europe features ‘no added sugar’ claims, and this vastly outweighs that of other regions. Some brands are also highlighting the role of veterinarians in the manufacturing stage to reassure pet owners.

### Convenient packaging in the Americas

The Americas have seen a substantial increase in new packaging launches over the past decade, from 14% of all new product launches in 2014 to 26% in 2023. Some of this is to offer more convenience – for example the emergence of flexible stand-up pouches.

In North America and Latin America, wellness is taking center stage. Mintel consumer research has found that a significant 61% of US pet owners say that their pet's happiness and well-being is more important than their own. And 72% of US pet treat purchasers say they like to give their pets different kinds of treat products.

Despite signs of more pet allergies in the region, claims of low, no or reduced allergens have been seen less in the past year. But there are brands that recognize the importance of allergies claiming they can support immunity and the digestive function, as well as providing food and seasonal allergies relief.

### Product development outside the box

While innovation has taken a backseat in recent years, there are 3 areas of opportunity for the pet food category.

***New product launches were already declining before the pandemic, but Mintel has identified a sharp drop-off between 2020 and 2021.***



### New product launches as % of global pet food launches

43% dry food

53% wet food

65% treats

2014

34% dry food

35% wet food

37% treats

2023

### Inspiration from baby food

Brands designing products for puppies and kittens should take inspiration from the baby food category. This could involve aspects of packaging design, format and materials, or creating food bonding moments.

### Justifying sustainable options

Younger pet owners are deprioritizing sustainable pet food due to money concerns. Private labels should venture further into insect-based and plant-based options, while brands can hit the taste and health mark through blends.

### The next step in digestive health

Pet owners continue to prioritize gut health when evaluating pet food features. Consumers link the gut with many different strands of health, and pet food brands will similarly make associations between postbiotics and health benefits. ♦



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#### BACKGROUND

The company is headquartered in the San Francisco Bay Area in the US. Their factory is in Shantou, in the Guangdong province, on the eastern coast of China. It's a vertically integrated company that covers the complete production process: from product ideation to manufacturing, through to sales.

New Age Pet has distribution channels worldwide, with customers in Japan, Australia, New Zealand, the UK, Europe, Canada, Mexico, Costa Rica and the US.

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The company started with a simple goal: to create durable, functional and ecofriendly pet products that complement consumers' home décor. To be able to live up to this aspiration, they developed a proprietary composite blend of new and recycled polymers, and reclaimed wood fiber byproducts. This composite blend combines the benefits of wood and plastic into one material: ECOFLEX®. Different than any other material available on the market, ECOFLEX is durable, longlasting and non-toxic. It is also resistant to rot, mold and insects. It doesn't expand and contract due to fluctuations



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KIKA GROUP LITHUANIA

## 100% pet care: a commitment to wellness

### The story of how a Silver Poodle and a passion for the well-being of pets led to a growing pet group.

Founded by Janita Januškauskaitė-Plungė, KIKA GROUP's journey began over 3 decades ago with a simple yet profound love for animals and a desire to make a difference in their lives.

The inspiration behind this proudly family-owned business stemmed from a beloved companion, Kika: a Silver Poodle whose presence sparked a lifelong devotion to the world of pets.

Today, the company's holistic approach starts with recognizing the issues that pet owners face, before actively working on providing solutions to make everyday life easier for all pet owners, breeders and groomers.

#### The group

The KIKA GROUP consists of a pet retail business, a pet food factory, a treats factory and globally known brands Nature's Protection and Tauro Pro Line.

The group is also home to the Tauro Grooming Academy and Tauro Kennel, the birthplace of many world-champion dogs whose everyday needs, issues and wellness inspire many of the group's products.

From its humble beginnings, the company has grown into a global presence in pet care, with an American subsidiary as well as partners in more than 60 countries worldwide and

partnerships with over 700 businesses. KIKA GROUP's success is a testament to its unwavering commitment to excellence and a steadfast belief in the power of holistic pet care.

#### The 80-20 rule

At the heart of the approach lies the 80-20 rule or 'Pareto Principle'. When applied to pet care supported by the group's decades of experience and industry knowledge, this guiding philosophy emphasizes the critical balance between the fundamental elements of a pet's well-being – nutrition (80%) and daily care and veterinary attention (20%) – to ensure optimal health and happiness for pets. ► [SEE NEXT PAGE](#)



This elegantly simple yet profoundly impactful concept serves as the cornerstone of the KIKA mission, informing every decision the company makes, from product development to educational initiatives. It is also the foundation for building the range of products dedicated not only to solving current problems but also preventing future ones. For example, the company is working hard on solving pet allergies.

### Balanced nutrition (80%)

Just as a balanced diet is essential for human well-being, nutrition is the foundation of a pet's health and vitality. According to various research papers, the pet industry will start facing a high-quality materials crisis by 2028. Based on the information provided on the label, consumers may not be able to discern the quality of the ingredients. Nevertheless, the pets themselves will notice the difference. The difference could even become visible in the shape of a noticeable increase in allergy symptoms.

KIKA's flagship brand, Nature's Protection, is dedicated to providing pets with the highest-quality nutrition possible, which is why the company has started looking for – and using – only raw materials that are trusted to be the best. Crafted with premium ingredients, and sourced sustainably and ethically, Nature's Protection products offer a diverse range of premium dog and cat food, treats and supplements.

With an emphasis on natural, nutrient-rich proteins like salmon, white fish, krill and even insect larvae, Nature's Protection delivers nutrition that nourishes pets from the inside out, promoting optimal health and vitality for years to come.



The products go one step further. KIKA aims to solve problems and offer health benefits for cats and dogs with functional products that provide more than just nutrition. After years of hard work and research, the company has created the 'crown jewel': White Dogs dry food that tackles brown tear stains.

### Daily care and veterinary attention (20%)

While nutrition lays the foundation for a pet's well-being, it is daily care that rounds out the equation. Daily care encompasses a range of activities, including grooming, exercise and mental stimulation, all of which are essential for maintaining a pet's physical and emotional health.

Meanwhile, regular veterinary check-ups are crucial for early detection and prevention of health issues. KIKA believes in natural pet care, which is why its Tauro Pro Line brand offers a diverse range of natural pet cosmetics and innovative grooming equipment. The products are meticulously crafted to be gentle yet effective by utilizing the power of nature, based on natural ingredients that are safe for pets and the environment.

From revitalizing shampoos infused with essential oils to expertly engineered brushes and clippers, Tauro Pro Line

products epitomize luxury, efficacy and innovation, ensuring that every grooming session is a moment of joy for pets, groomers and owners alike.

### Beyond just products

The KIKA GROUP's commitment to pet wellness extends beyond just products; the company is dedicated to educating and empowering pet owners to make informed choices for their pets.

One of the proudest achievements to date is the ever-growing worldwide community of pet lovers sharing their success stories and before/after examples every day. In addition, the group receives numerous personal messages from business partners sharing in the joy of spreading health and wellness.

Through innovative product formulations, eco-friendly manufacturing practices and educational initiatives, the KIKA GROUP is looking forward to shaping the future of pet care for generations to come. ♦

**Interzoo: Hall 4, Booth 4-115, 4-118**

### KIKA GROUP

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Country report: Turkey

# Future looks promising for Turkish pet food manufacturers

**Pet ownership is on the up, consumers are increasingly opting for higher quality and the export business is booming. Let's take a closer look at the dynamics of the Turkish pet care market.**



**Arzu Efeoğlu**

*Contributor*

*PETS International*

In 2023, Turkey had a population of more than 85 million people, according to the Turkish Statistical Institute, and around 20.9 million pets. This number is expected to rise as owning a pet continues to become increasingly popular in the country, meaning there is plenty to analyze in the pet industry sector.

## **Pets gaining prominence**

The profile of pets and their owners has significantly grown in Turkey over the past few years. "The pandemic period accelerated this process. The cat and dog food industry is growing rapidly both in the domestic market

and in exports thanks to this favorable ground," says the Aegean Cereals, Pulses, Oil Seeds and Products Exporters' Association.

Petlebi.com, an online pet shop and pet rehoming platform, has rehomed approximately 150,000 cats and dogs so far. Co-founder and CEO Atay Algeç agrees that the interest in pet adoption among Turkish people has increased more strongly since the COVID-19 outbreak.

There are no official figures on the value of the domestic pet care market in Turkey, but Algeç believes that it has approximately doubled since the pandemic. "It is not possible to share a clear rate, but I can use petlebi.com's growth figures as a basic indication. We grew threefold during the pandemic period," he says.

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## ***Turkey has a strong pet food manufacturing industry serving both the domestic and international market.***

### **More discerning customers**

Other industry insiders believe that pet parents are more critical and investigative than in previous years. “They want food brands that meet cat and dog needs. Products that are rich in ingredients and produced with high quality are increasingly preferred,” states Oktay Diker, Corporate Communications Manager at pet food manufacturer Lider Group.

This Izmir-based company also says that dog ownership is becoming more popular in Turkey, especially of small and mini-breed types.

### **In-store versus online**

The country’s Ministry of Agriculture and Forestry recently reported that 2,365 stores received licenses to sell pets in 2023. The majority of these stores are located in developed metropolitan areas – such as the capital Ankara and Istanbul – where the cat and dog adoption rate is high. Algeç estimates that Istanbul alone, which is the largest city in Turkey with more than 15 million inhabitants, accounts for approximately 35% of the nation’s pet market.

Although the exact online penetration rate in the pet industry is unclear, e-commerce seems to be gaining popularity among Turkish pet parents. “People used online channels more during the pandemic and got used to its convenience,” says Algeç from petlebi.com, which claims to have 1.5 million visitors per month.

Algeç also points out that the small size of most pet shops in Turkey limits the product assortment, which is why consumers prefer online shopping for pet products. For example, it is believed that most pet shops in Istanbul are around 35 sq m. Therefore, pet stores tend to only carry the best-known brands or the brands with the highest profit margins, leading to a lack of brand diversity.

Stores are also lacking a wide range of accessories and toys. Even though pet shop owners are financially solid, they cannot purchase large amounts of goods

at once. This means they often cannot offer attractive promotions and discounts to their customers.

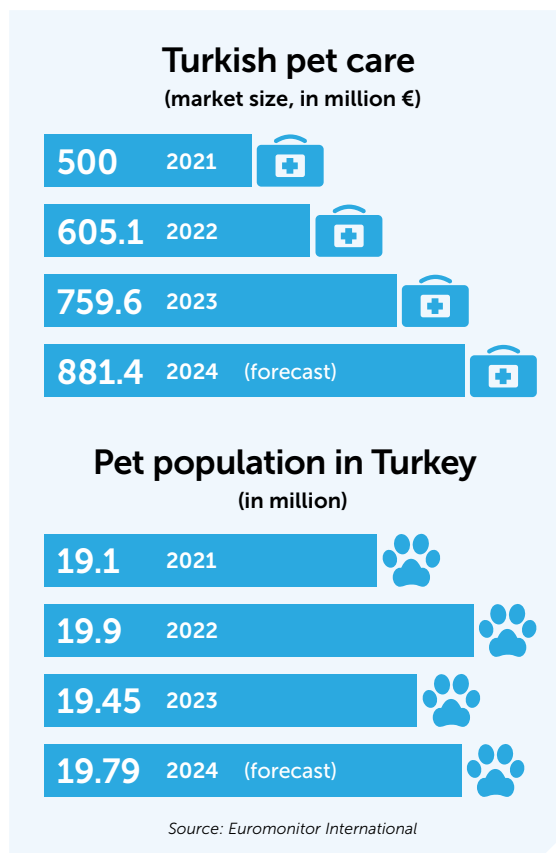
### **Impact of inflation**

With the inflation rate exceeding 60% in the last 2 years, Turkish citizens are experiencing a decrease in purchasing power. According to price comparison websites, cat and dog food prices increased by between 35% and 55% compared to 2023.

“Despite the high cost of living, we think that the pet sector is the industry that is least affected by the high inflation because pet owners are seeing their pets as their children,” comments Algeç.

Nevertheless, Lider Group observed that some customers are looking for cheaper alternatives in the pet food space, signaling a transition from the premium to the mainstream segment. Algeç adds that this trend occurred mostly in food for large-breed dogs due to the high monthly consumption amounts.

[▶ SEE NEXT PAGE](#)







### Thriving export market

Turkey has a strong pet food manufacturing industry serving both the domestic and international market. It is believed that 60% of the cat and dog food is produced in the Aegean region of the country.

The country exported pet food to 96 countries last year. The top 10 markets were Malaysia, Israel, Iraq, US, UK, Greece, Morocco, Saudi Arabia, Georgia and the Turkish Republic of Northern Cyprus (TRNC).

The value of these exports totaled \$122 million (\$133M) in 2023. "In 2014, Turkey exported only \$4.5 million (€4.1M) worth of pet food. The sector's exports gradually increased and reached \$8 million (€7.35M) in 2018. In 2019, the sector started to grow exponentially," says Muhammet Öztürk, Chairman of the Aegean Cereals, Pulses, Oil Seeds and Products Exporters' Association.

In other words, pet food exports have increased 27 times over the last decade. The sector aims to hit \$150 million (€138M) in pet food exports by the end of 2024. ♦



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Martin Group FRANCE

## The evolution of MARTIN

Since it entered the pet accessories market in the late 1960s, MARTIN has become an internationally distributed brand known for its commitment to quality and animal welfare.

Founded in 1927 by Charles Martin, a native of Auvergne, the original company distributed accessories to hardware stores. In the 1960s, the business moved to the north of France and Charles's son, René, opened and developed the first French manufacturing site for dog and cat accessories in Maubeuge in 1969.

Very quickly, the quality of the products made for a success, generating incredible results for the company then named René Martin. Flagship brand Cleps then changed to Martin Sellier and the famous 'papillon' symbol was adopted with the aim of reaching the international market. In 2000, saddlery production was moved to Tunisia.

After joining in 1994, Ludovic Deswarte took over the company in 2006. Deswarte brought significant expansion to the company, in particular thanks to the integration of many specialized players in the sector (including Les

Laboratoires Héry, Vivog, Arka Hoak, Alter Ego, Dynavet and Sellerie Canine Vendéenne), the construction of a new 12,000 sq m logistics center and the implementation of high-performance management systems.

55 years after its creation, the company, now called MARTIN, boasts a complete offer with 13,000 product references to satisfy the needs of our four-legged friends, and makes quality and respect its priorities.

### The butterfly brand

The MARTIN brand has forged a strong link with its logo, the butterfly, a figurative emblem of the 3 pillars of the company:

**1 - The difference:** If MARTIN doesn't have a moustache, paw or dog logo, it's to show its difference. This difference is reflected in its product offer, which is entirely designed in-house by stylists and designers. But it's also reflected in

the human relations with the company's 144 employees and partners, customers and suppliers, with whom the search for a strong and lasting bond is always the order of the day.

**2 - Respect for nature:** If the butterfly evolves in the wild, MARTIN takes every precaution to preserve its ecosystem, which is also essential for dogs, cats and their owners. Thus, in each product development, the packaging, the materials and the product's lifespan, get special attention from MARTIN's product managers.

**3 - Beauty:** Colorful, majestic – the butterfly does not leave you indifferent. The design of MARTIN products is geared towards creating modern and trendy products. A look and style guaranteed for the animal, accessories with an incomparable finish, and furniture that can be easily integrated into the heart of our interiors.

► SEE NEXT PAGE



These 3 pillars represented by the butterfly have allowed MARTIN to maintain the same trajectory through the years. This is an essential course of action to maintain the trust placed in them by the pet lovers.

### Flying to the international market

MARTIN's pet lovers can be found from the United States to Japan. Present in more than 53 countries, with a direct sales force in Italy, Spain and Belgium, it is through partner distributors and pet specialists in their country that MARTIN has chosen to distribute its entire assortment and to disseminate its advice. With a French brand and products where every detail, every finish, counts for the animal and its owner, the butterfly has been quickly adopted outside the borders of France.

### A protective butterfly

However, France remains the biggest market for MARTIN. With 15.1 million cats and 7.5 million dogs, the butterfly easily finds its place on the harness, leash, cushion... of any household with an animal.

Unfortunately, the figures for this market are just as impressive when we look at the number of dropouts and acts of abuse. Today in France there a pet is abandoned every 2 minutes. A sad observation to which MARTIN is not insensitive. This is why for several years MARTIN has been involved with L'Arche des Associations,

the first French federation that brings together organizations for the protection, mediation and defense of animals. Thanks to the Arche and all the French associations, in 2023 MARTIN was able to donate 52 tons of kibble, nearly 150,000 meals, accompanied by 11,000 accessories.

It is also through partners such as Asso Media, Lekkarod or Nosaïs, that MARTIN is committed to promoting the importance of dogs and cats for humans. Whether they act as mediators in specialist centers or as true friends of medicine in the context of disease detection, these animals are real treasures that MARTIN guarantees to support.

Even before the associative axis, MARTIN put the protection of dogs and cats at the heart of its product selection with the company taking action in the following areas:

- 2010: an end to thermoplastic-based rubber toys
- 2008: an end to pressed bones in Asia
- 2023: an end to choke collars and electric collars

All these are strategic decisions that testify to the place of animal welfare at MARTIN.

### Investing for them

With animal welfare holding such a place at MARTIN, its investments also bear witness to this.

In 2010, MARTIN set up a factory in Spain making toys exclusively of 100% natural rubber. The founder, Ramon Solà, who has travelled around the world and managed several rubber factories, settled in Catalonia and created the company with his wife in 1999. It was in discussions with his veterinary friends that Ramon created a formula for non-toxic toys. While many manufacturers

add thermoplastic to rubber toys to save manufacturing time and therefore costs, MARTIN has decided to opt for a process that requires time but does not put dogs' health at risk with a unique formula on the market to prevent all risks of intestinal obstruction.

In 2018, MARTIN launched into pet food. Nutrition has an undeniable impact on the health and well-being of the animal, which is why MARTIN has decided to select the best food manufacturers in the world. With quality raw materials and state-of-the-art manufacturing methods, the selected brands make it possible to offer a premium nutritional choice for our animals. To date, MARTIN offers the following brands: Orijen, Acana, Gosbi, Schésir, Terra Canis, Inaba and Earth Animal.

Since 2023, MARTIN has been investing in the Bach Flowers sector with the brand Velbecia. If gentle and natural treatments are effective for humans, adults, and children, they may be just as effective for our companions. The brand thus promotes education in treating pets with gentleness and sustainability, without the use of chemical products and without punitive behaviors, with the aim of ensuring the animal is respected.

MARTIN, the butterfly brand, surrounded by its employees, partners and experts (veterinarians, ethologists, educators, behaviorists, Bach flowers experts, groomers, breeders and more) has been soaring higher and higher since 1969. New projects and new investments are studied every year with one ultimate goal: to bring the best to dogs, cats and their owners. ♦

### MARTIN SELLIER

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# From crisis to expansion: Kormotech's road to growth

**Which solutions will create a secure supply chain that is guaranteed to work, even in extreme and uncertain environments? Discover how Kormotech thrived during turbulent times.**



**Ulyana Fitsa**  
*Supply Chain Officer*  
Kormotech  
[kormotech.com](https://kormotech.com)

When the invasion of Ukraine began in February 2022, it impacted not only local businesses but also Europe and the rest of the world. Blocked transport routes – plus a maze of new regulations – threw the global economy into disarray. Faced with the dual challenge of meeting growing demand while navigating an increasingly vulnerable supply network, the pet food industry found itself at a crossroads.

## Crisis management strategy

In the eye of the storm, Kormotech was confronted with a potential disruption of its supply chains as the invasion continued. It was its response to this crisis that would set the company apart. By embracing flexibility and fostering robust partnerships, Kormotech not only weathered the storm but emerged even stronger.

## Adaptation and collaboration

At the heart of its strategy was a move away from rigid hierarchies towards a more fluid, responsive organizational structure. Direct lines to the CEO, and a culture of teamwork within and beyond the company's walls, enabled Kormotech to adapt quickly to changing circumstances.

Strategic alliances with local suppliers underscored the importance of solidarity and shared purpose, proving crucial in maintaining operations under the most severe conditions.

## Warehouse relocation

The company's agility was also demonstrated in its response to import bans. Kormotech clearly needed a contingency plan. To make sure bans like these would not affect business, it needed to relocate its warehouses to a safer region. Opening a warehouse in Poland, Kormotech not only safeguarded its operations but also seized the opportunity to expand into Eastern Europe, setting the stage for future growth.

## The road ahead

Kormotech's journey through the turmoil of war is a testament to the power of foresight and adaptability. Next up is a 5-year journey to establish itself as a global industry leader.

Kormotech's strategic ambition is to join the ranks of the world's top 30 pet food companies. Its story proves that, even in the darkest times, resilience and innovation can pave the way to growth. ♦

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# Feed additives: the complex re-evaluation process in the EU

**The approval process for feed additives has undergone major change, resulting both in significant costs and increased workload.**



**Julia Klischies**  
*Pet nutritionist*  
[petfood-expert.com](http://petfood-expert.com)

The overarching objective of re-evaluating all feed additives is to ensure a standardized and contemporary approach within Europe. This involves adhering to consistent guidelines and taking into account the latest scientific advancements in the field.

## Why initiate an EU-wide re-evaluation?

Since 2003, when the decision was made to subject all existing feed additives on the market to re-evaluation by the Panel on Additives and Products or Substances used in Animal Feed (FEEDAP) from the European Food Safety Authority (EFSA), there has been a pervasive sense of uncertainty regarding the prevailing regulations.

Currently, Regulation (EC) 1831/2003 is the governing framework since its implementation in October 2004. It establishes the legal parameters for feed additives, including a significantly overhauled approval process for these substances.

The EFSA's FEEDAP panel plays a crucial role, assessing not only the safety of feed additives for animals, but

also considering their potential impact on human health and the environment. A noteworthy aspect of this evaluation is that all feed additives containing microorganisms are also tested for their possible resistance to antibiotics used in human and veterinary medicine.

## Where to find current data

Formerly, Annex I of the PDF register showed additives undergoing re-evaluation, those provisionally approved for 5 years pending re-evaluation, and newly assessed additives approved for a decade. It also included authorizations for previously unapproved additives.

Meanwhile, Annex II catalogued additives without submitted applications, those with withdrawn applications, additives with new approvals under transitional arrangements, and those with expired approvals.

The recent shift to an exclusive online EU register, effective as of April 2023, has provided a more accessible and detailed overview of the current status of feed additives. These status categories can now easily be displayed in the online register by setting filters.

► [SEE NEXT PAGE](#)



***Feed business operators bear the responsibility of regularly verifying the status of the feed additives they use in their products.***

### Re-evaluation process

To subject previously registered additives (known as 'e-substances') to the re-evaluation process, applications to the EFSA were submitted in November 2010. Anyone could submit an application, including individuals, additive manufacturers, pet food producers or any other interested party.

The application process demands a substantial workload, necessitating the submission of a comprehensive dossier containing detailed information and studies on the additive in question. Applicants are subject to fees, leading to submissions primarily from industry participants with a vested interest in the continued use of the respective feed additive.

In some cases, alliances were formed to collectively submit an application to share effort and costs. Authorizations cannot be granted for the sole use of the applicant – authorized feed additives can be used by everyone. For some substances with minimal industry interest, no re-evaluation applications were filed.

### Approval process

Approval is granted individually for each substance, which makes it hard to maintain the overview. Upon successful re-evaluation, a feed additive is granted approval for a period of 10 years, after which re-evaluation is needed again.

While the EU Commission provides the community register as an informational source, it is crucial to note that this resource itself is not legally binding. The legally binding documents are the corresponding regulations, but they are accessible for each listed additive in the register. Nevertheless, it is advisable to double-check whether the current consolidated version of a regulation is listed, as the database is not always guaranteed to be fully updated.

### Verifying the status

Feed business operators bear the responsibility of regularly verifying the status of the feed additives they use in their products. Re-evaluated additives are distinguishable by their new identification numbers.

The first digit of the new identification number provides a simple and direct indication of the category to which the additive has been assigned (e.g. 1f – thickening agent). It is not only necessary to check whether an additive has been newly approved, but also whether specifications on maximum quantities, approved animal species or general instructions for use have changed.

It goes without saying that these changes must be integrated into the company's own process. Different transition periods must be taken into account depending on the industry sector.

### Withdrawals of feed additives

Feed additives for which no application has been submitted, the application has been fully or partially withdrawn, or there is no positive opinion from EFSA, are withdrawn from the market by regulation. Here, there are also corresponding transitional periods.

But beware: a market withdrawal of a feed additive does not affect its classification as a feed additive – it remains unchanged even if removed from the market. A clever feed manufacturer could ponder using the feed additive that has been withdrawn from the market as single feed material in their recipes – after all, it is no longer an approved feed additive.

Sadly, this is not possible. Although the additive has lost its authorization, it has not lost its classification in the 'additives' category. A decision on a different categorization must be actively taken – as long as these substances remain 'feed additives not approved in the EU'. It's also important to note that an entry in the EU register of feed materials does not constitute a legally binding classification of substances as feed materials.

The classification of a substance as a feed additive can be decided in the so-called comitology procedure. This must be done on a case-by-case basis for each substance. So far, no decisions have been made on this basis. ♦







**pet-earth GERMANY**

## Celebrating sustainability: introducing eco-friendly cat litter and a rebrand

**With a new CEO at the helm, pet-earth aims to enhance its market presence with environmentally sustainable products and a fresh brand image.**

Pet-earth was founded in 2003. In the early days, the company sold prepackaged litter, but it soon began manufacturing operations in Germany. It uses only naturally sourced raw materials for all its Golden products.

The company has since made a name for itself – both at home and internationally – for focusing on the production of high-quality cat litter. After more than 20 years, the Golden brand has become one of the most popular premium cat litters on the European market, trusted and preferred by many pet owners, cat breeders and veterinarians.

### Product innovation plus brand building

Although already present in many countries, pet-earth continues to expand its horizons as it ventures into new markets and engages with the next generation of pet parents. Over the years, the original bentonite-based Golden Grey brand has been joined by the products Golden Grey Master, Golden Odour and

Golden White. The line has also been extended with Golden Pine, made from renewable resources consisting of 100% pure plant fibers.

This year, pet-earth is planning to launch another line of eco-friendly cat litter. This new range will feature innovative, environmentally friendly ingredients that are biodegradable and designed to minimize ecological impact.

In addition to the product introductions, the company is currently working on a branding update. That will include a completely new corporate identity, website and logo.

### Service-based technology

Apart from the premium quality of its products, pet-earth also strives to be the right business partner for its customers, providing extensive services. Throughout the manufacturing chain, the latest technology and staff expertise combine to guarantee a smooth workflow – from raw material processing to product delivery.

Meeting all individual requirements and customer wishes, with private labels or packaging sizes for example, is all part of the pet-earth service.

### Under new management

In October 2023, Jesper Bach Sørensen took on the role of CEO at pet-earth. Bringing a wealth of experience from both the pet industry and international trade, Sørensen is poised to enhance the visibility of the Golden brand and extend its market reach through new distribution channels.

His expertise in retail and strategic vision are anticipated to drive the successful implementation of the company's ambitious projects. Under Sørensen's leadership, Pet-earth aims to strengthen its position in the market, attracting more buyers without compromising the loyalty of its established customer base.

**Interzoo: Hall 9, Booth 9-564**

**pet-earth GmbH**

[info@pet-earth.de](mailto:info@pet-earth.de) | [pet-earth.de](https://pet-earth.de)





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Interzoo: Hall 1, Booth 1-338

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The constant vision to the future and a passion for this sector lead the company to introduce new products every year, investing resources in quality and control before putting them on the market, and thanks also to collaboration with professional laboratories dedicated to the creation of formulas, product registration and new developments.

Interzoo: Hall 1, Booth 1-247

#### **Aquarialand sas**

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## Country report: Spain

# Pet prioritization drives innovation

A shift in perception has expanded the Spanish pet care market and heightened the demand for high-quality products and services focused on well-being.



**Ignasi Solana Vinyoles**  
Secretary General  
AEDPAC

The pet care industry Spain has witnessed significant growth in recent years. This is partly due to an evolving landscape where consumers increasingly feel a profound connection and commitment to their pets – something which companies are striving to respond to.

### Members of the family

According to the Barometer of the New Habits of Pet Parents in Spain, 8 out of 10 individuals responsible for a pet consider their furry companions to be additional family members.

When asked about the need to reduce the cost of their family's shopping basket, 61% of respondents expressed a willingness to sacrifice their own brand preferences over those of their pets.

According to the results, the average monthly expenditure on pet food in Spain is €62.7 (\$67.8) for dog owners and €55.1 (\$59.5) for cat owners.

The survey, carried out in February 2024 in collaboration with consultancy firm Hamilton Global, found that 78% of respondents had always had a pet at home. A further 22% had recently welcomed their first ever pet.

### Fresh wave of young start-ups

A new generation of innovative and adaptable pet-care start-ups are emerging to capitalize on this evolving consumer landscape.

[▶ SEE NEXT PAGE](#)

### Pet population in Spain (in million)

20.63 2021



20.92 2022



20.3 2023



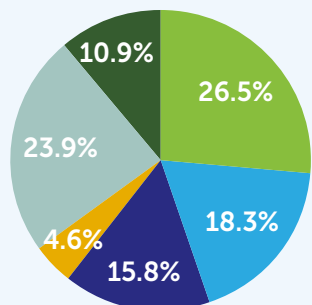
20.45 2024 (forecast)



Source: Euromonitor International



## To what extent would you like to take your pet to work?



- I would like it very much
- I would like it quite a bit
- Not too much nor too little
- I would like it a bit
- I wouldn't like it
- I work from home

Source: AEDPAC's Barometer of the New Habits of Pet Parents in Spain, 700 online interviews, February 2024



The leaders of these enterprises represent a wave of young, accomplished and highly skilled entrepreneurs.

One notable example is Talía Bonmatí of Dindog Tech, who successfully engineered an innovative pet harness embedded with sensors to improve animal healthcare. Another standout new venture is Kibus Petcare, spearheaded by Albert Icart.

This innovative company markets a kitchen robot specifically designed to prepare food for dogs, all controlled through a user-friendly app.

### Platforms for pet care

A number of interesting tech platforms have been launched in Spain. For instance, Álvaro Gutiérrez of Barkibu has pioneered a veterinary telemedicine services platform offering consultations through video conferencing, live chat or by phone. Another

noteworthy project is Snau, a platform facilitating connections between pet owners and trainers, daycare centers and groomers.

Meanwhile, Gudog offers a convenient platform for engaging dog sitters, and Doggies in Town presents an app that serves as a guide to 'dog-friendly' spaces and activities.

### Customization and personalization

Various services cater to the rising trend among owners of pampering their pets. Patasbox offers subscription boxes tailored for cats and dogs, while Gonzalo Noy from Dogfy Diet specializes in crafting personalized diets and ensuring convenient home deliveries.

In another take on the personalization trend, PetGuest, based in Barcelona, crafts customized welcome kits and amenities for pets staying at pet-friendly hotels and establishments.

### Spanning the human and pet realms

Meanwhile, a growing number of companies previously only serving human consumers have recognized opportunities within the pet sector.

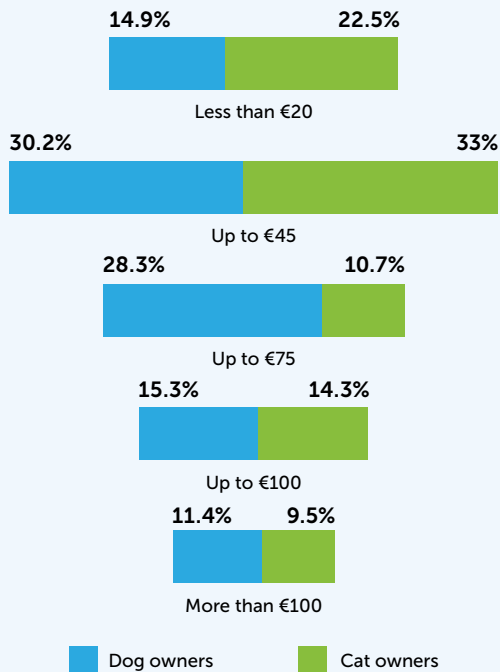
***Innovative and adaptable pet-care start-ups are emerging to capitalize on this evolving consumer landscape.***



Leveraging their knowledge and expertise, optimizing their infrastructure and resources, and capitalizing on existing equipment and talent, companies from various sectors – including licensing, insurance, childcare, interior design, landscaping and more – have launched spin-offs to explore the vast potential in the pet industry.

The exchange of knowledge and experience between the realms of humans and pets creates synergies, enriching each step of the process and fostering innovation. From a broad perspective, the cross-fertilization of ideas from different markets and industries can contribute undeniable value to the pet care sector. ♦

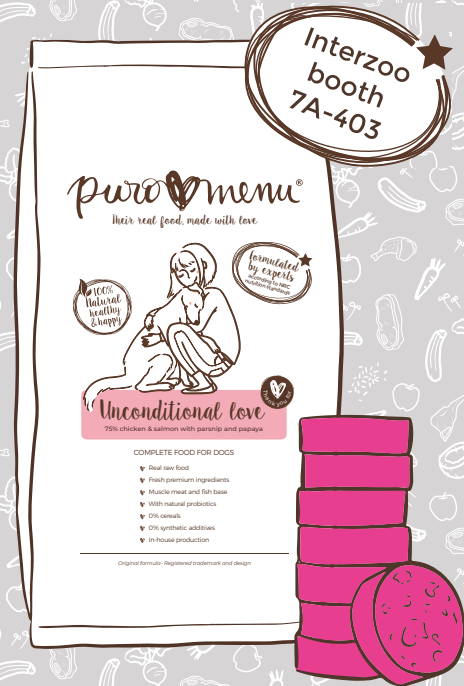
### Average monthly expenditure in pet food in Spain



Source: AEDPAC's Barometer of the New Habits of Pet Parents in Spain, 700 online interviews, February 2024

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## Pet marketplaces: the place to be?

The number of new marketplaces offering exclusive pet services and products is on the rise. We look at the factors that are driving this trend, who the key players are, and what sort of opportunities are opening up.



**Muskaan Gupta**  
*Associate News Editor*  
*GlobalPETS*

Online marketplaces act as the ultimate pet store aisles. They simplify complex buying decisions, erase purchase hesitations and instill confidence by leveling the playing field.

“The convergence of fragmentation, consumer skepticism and our relentless ‘on-demand’ culture forms a potent mix, creating the perfect breeding ground for the pet industry’s transformative marketplace era,” says Chloe Smith, CEO at UK-based marketplace Tuft.

### Attractive investment proposition

The new pet marketplaces are leading to the ‘Uberization’ of pet care. “They are streamlined, trustworthy, and tailored to the modern pet parent’s needs,” explains Smith.

The pet industry is widely regarded as being resilient enough to survive inflationary periods, having demonstrated a strong ability to retain customers and generate consistent product demand. According to Tom Gladstone, Partner at OC&C Strategy Consultants, the pet industry’s ability to squeeze out more customer income more successfully than other categories has encouraged the market and investors to support this space.



*The pet industry has demonstrated a strong ability to retain customers and generate consistent product demand.*

"Many pet-related areas are categories where the consumer has a repeat need for that product – which means there is a long-term repeat behavior you can play into as a marketplace or a supplier," says Gladstone.

In February this year, for example, Seattle-based pet care marketplace Rover was acquired by private equity (PE) firm Blackstone in a \$2.3 billion (€2.1B) deal. The company anticipates to close 2023 with a revenue of around \$231 million (€211M), representing a year-on-year (YoY) increase of approximately 33%.

Similarly, pet-sitting marketplace TrustedHousesitters received a capital injection of \$100 million (€91.4M) from PE firm Mayfair Equity Partners last December. A British company, TrustedHousesitters operates in 140 countries and recorded 158% YoY growth in 2022.

### Fragmented suppliers

Humanization and premiumization trends have also resulted in new category areas that marketplaces can move into. Gladstone adds that new consumer demand for categories like accessories, equipment or services has encouraged fragmented suppliers to come under one retail belt.

### Some major players

#### Supplies

German retailer Fressnapf ventured into the marketplace sector in 2022 as a strategic move to offer a 'one-stop-shop experience' for its consumers. Since the launch of its marketplace and the integration of third-party retailers, the firm claims to have doubled its number of online stock keeping units (SKUs).

"We guarantee our customers a broad, innovative and available product range for every pet and every pet owner. We firmly believe that this is key to remaining the number 1 platform for pet owners in Europe," says Karolin Brombach, Head of Marketplace at Fressnapf/Maxi Zoo.

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At the beginning of this year, marketplace operator The Wires launched PawWire, a premium business-to-business-to-consumer (B2B2C) marketplace for all pet supplies: from food and grooming products to accessories, furniture, toys and pharmacy products. The Seattle-based company moved from beauty retail tech platforms to pet supplies after recognizing the pet segment's "huge growth opportunity for the same compelling, interactive marketplace platform".

Kimberly Carney, CEO of PawWire, explains that its strategy is to diversify the number of brands and products that consumers can discover, interact with and shop for on the platform. "So far, we've seen the most interest in pet accessories like collars and leashes, beds, toys and treats," she says.

Presently, PawWire's top innovation lies in its two-fold offerings both for third-party brands and customers. The former gain access to direct feedback from their

***Specialized pet marketplaces  
also present a good opportunity to  
work on customer loyalty.***

customers, while the latter can discover more brands by swiping on products in the interactive user interface (UI). To innovate in the future, PawWire plans to focus on rolling out technologies to build and enhance brand/consumer relationships.

### **Services**

UK-based Tuft app, launched in 2021 as a marketplace for grooming services, offers pet parents the convenience of booking from an array of care services for an 'aisle-like experience'. According to the company, bookings have grown by between 9 and 10% every month, and the number of transactions increased from 10,000 in 2022 to 40,000 in 2023.

"2024 is going to be focusing on solidifying our market share in the grooming space and working strategically with partners to increase the frequency of use of the app by adding additional services and e-commerce," states Smith.

The company aspires to enter pet boarding, walking and veterinary and non-medical care services on its 'pet super app'. The marketplace also expects to integrate e-commerce retailers supplying grooming products from the third quarter of this year onwards.

### **Insurance**

Insurance firm Marble recently partnered with Fletch, a technology provider, to establish an in-app marketplace for pet insurance. The model claims to offer 6 times as many trusted insurance providers via the marketplace. By allowing customers to compare plans and customize their coverage, it enables them to save as much as 57%.

"We were excited to launch into pet insurance because Marble members have added thousands of pet insurance policies to their digital wallets," says Marble's CEO and founder Stuart Winchester. He adds that they pursue a marketplace approach in everything they do.

According to Winchester, the company's success lies in the ability to cater to a market that doesn't have one-size-fits-all offerings – such as insurance: "Due to factors like price and coverage, alongside things like breed, pre-existing conditions and location, you really have to offer pet owners a wide variety of products. That's what we aimed to do." Within 2 months of



launch, between 2 and 5% of Marble's daily users are checking out a pet insurance offering on their app.

### More categories, more loyalty

Growing consumer preferences for the personalization of pet products and services create extra scope for marketplaces to capture innovative and fast-to-market suppliers. Specialized pet marketplaces also present a good opportunity to work on customer loyalty. According to Smith, once customers are acquired it is easy to retain them, as pet parents dislike the hassle of finding new trustworthy pet care service providers.

Gladstone foresees that marketplaces will tap into the continued innovation and development of accessories and equipment, whether in terms of new categories being developed or the premiumization of existing ones. And although there is currently a significantly greater market for pet supplies than live pets, both on marketplaces and more generally, he predicts a rise in pet adoption marketplaces that match breeders with prospective pet parents.



Winchester forecasts the inclusion of proactive health and wellness products, alongside other pet services in pet insurance marketplaces. "It's natural for all these products to live together," he comments. ♦

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\*Source: IRI Grocery Retail,  
December 2023



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**Mackle Petfoods UNITED KINGDOM**

## Exciting rebrand for award-winning pet food brand Naturo

**Mackle Petfoods, the pioneering force behind Naturo, has just unveiled an exciting refresh of its acclaimed brand.**

Established by visionary entrepreneur John Mackle in 2010, Naturo epitomizes Mackle Petfoods' dedication to quality and transparency.

Crafted by Naturo's team of expert pet nutritionists, each recipe includes a meticulous selection of locally sourced ingredients, where possible, and a strict avoidance of artificial colors, flavors and preservatives.

At the heart of Naturo's philosophy lies a holistic approach to pet nutrition, focusing on 6 vital nutrients essential for optimal health: protein, carbohydrates, omega oils, prebiotics, minerals and vitamins.

These carefully balanced formulations cater to pets' diverse needs across all life stages, promoting healthy growth, digestive wellness, coat maintenance and overall vitality.

### Naturo's rebrand

The recent rebranding initiative not only revitalizes Naturo's visual identity,

but also underscores its core values and commitment to pet welfare. By amplifying the brand's natural ingredients and their many benefits, the refresh aims to resonate with discerning pet owners seeking premium yet affordable nutrition for their beloved companions.

Eva Mooney, Mackle Petfoods' Senior Marketing Manager, expressed her enthusiasm for the brand's rejuvenation, emphasizing Naturo's continued dedication to product excellence:

"Through ongoing collaboration with pet owners and in-house nutritionists, Naturo has enhanced its recipes to further elevate the nutritional profile of its offerings, featuring increased meat content and the integration of yucca and prebiotics to support gut health."

### Naturo's success

Naturo has not only been the UK's number 1 natural wet pet food for an impressive 7 consecutive years but has also secured its position among the top 4 wet pet food brands nationwide\*.

With an annual global turnover of £30 million (\$37.7M/€34.9M), Naturo has emerged as a pet industry success story. Naturo's reach extends far beyond the shores of the UK and Ireland, with exports spanning across 14 countries globally.

With a workforce of 265 employees across its 2 sites in Moy and Moygashel, Mackle Petfoods continues to drive innovation and set new standards in the pet food industry.

As Naturo's freshly rebranded products make their way on to the shelves of leading grocery retailers and pet specialist stores, it reaffirms its commitment to providing pets with the nutrition they deserve, setting a benchmark for excellence in natural pet food worldwide. ♦

*\*Source: IRI Grocer Retail 12/23*

### Mackle Petfoods

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# Pet industry sets out demands ahead of the European elections

The newly appointed Secretary General of FEDIAF, the trade body representing the European pet food industry, shares the topics that will be high on the agenda in the coming months.



**Sonia Franck**  
*Secretary General*  
*FEDIAF European Pet Food*

In light of the upcoming European Parliament elections in June, FEDIAF has produced a manifesto that represents the needs of the pet food industry based on its 3 pillars: to provide safe and nutritious pet food; to highlight the important role of pets in society; and to promote sustainability from farm to bowl. The organization is presenting these asks to policymakers for the upcoming policy cycle.

## Creating open dossiers

FEDIAF continues to champion the pet food industry's interests and is currently working on some open dossiers.

A key focus has been the European Commission proposal for the Green Claims Directive, which FEDIAF welcomed, as it has always acknowledged the need for clear legislation regarding business-to-consumer marketing claims of an environmental nature. This would create a level playing field in the pet food industry.

FEDIAF has also been advocating for an EU-harmonized legislative framework and recommends the Product Environmental Footprint method. This Life Cycle Assessment methodology was developed by experts and validated by the Commission. Covering 16 impact categories of a product, it helps to identify the biggest impact areas in a product's life cycle and to adapt recipes to track and improve the environmental performance of products.

Product Environmental Footprint Category Rules should be acknowledged as the standard calculation method for substantiating environmental impact claims related to pet food. This will enable consumers to make proper comparisons between products – simplifying their lives and resulting in a shift towards more sustainable buying patterns.

The European pet food sector was proud to partner with the Commission in a pilot project to support the development of these rules, which were endorsed in 2018. Since then, FEDIAF has been committed to supporting, developing and updating this methodology.



*FEDIAF welcomes the proposed new EU rules on the welfare of dogs and cats and their traceability.*

### Spotlight on packaging

With regard to the Packaging and Packaging Waste Directive (PPWR), FEDIAF was broadly supportive of the Commission's approach with its objective to harmonize rules and minimize packaging and packaging waste, and the organization engaged with MEPs to highlight the importance of ensuring pet food safety as part of the PPWR discussions in committee.

Reflecting its objective to promote the important role of pets in society as well as pet welfare, FEDIAF has welcomed the recent proposal for new rules on the welfare of dogs and cats and their traceability. This long-awaited legislation established uniform EU rules for the welfare of dogs and cats that are bred or kept in breeding establishments, pet shops and shelters. For the first time ever, minimum standards will apply to the breeding, housing, care and treatment of these animals across the EU.

In terms of FEDIAF's contribution to the legislation, it focuses on its area of expertise. For example,

proposing some minor but important points for the feeding and watering section (Article 11). That includes providing clear justification by referencing the Nutritional Guidelines, a reference resource in existing EU regulations.

This harmonized reference document focuses on dog and cat nutrition and is developed in conjunction with experts on the FEDIAF Scientific Advisory Board, which comprises board-certified veterinary nutritionists.

### Ensuring ingredient safety

Another priority is ingredients, which are fundamental to the supply of safe and nutritious pet food. FEDIAF continues to advocate that Category 3 animal fats should not be considered for use as biofuels. This usage contradicts waste hierarchy principles and adversely affects our circular economy.

Another advocacy issue is the approval of feed additives without disproportionate data requirements. Also, the request that FEDIAF is included and engaged with during the regulatory process for additive review and future feed legislation updates. ♦



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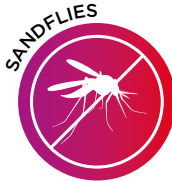
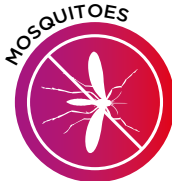
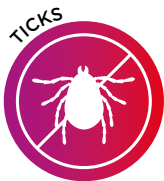


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The new **ECTO CHOC** range of pest control products acts on parasites present on the **ANIMAL + ENVIRONMENT**.

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**QUICKLY NEUTRALISES PARASITES**



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



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## Pampered paws and stylish pooches: winter pet accessories cater to comfort, safety and style



The pet accessories market offers a wide range of winter essentials for furry friends, from designer wear to heated beds and paw protection.



**Karen Cornish**  
Contributor  
*PETS International*

The pet accessories sector remains robust and is estimated to be worth just over \$32 billion (€29.51B) by 2028. Within this, the market offers a wide range of winter-specific accessories, including warm and waterproof clothing and boots, heated beds and bowls.

### Designer products

Pets are still enjoying relatively lavish lifestyles despite the need for many owners to cut down on their non-essential spending. It seems that pet parents are happy to pay for designer products if they meet their needs, which extends to winter clothing.

Fashion brands have recognized the value of the 'hound pound' and have started extending their product ranges to include clothes for pets – even with matching dog and owner outfits. Designer and dog lover Sandy Liang has teamed up with pet lifestyle brand Little Beast to create a winter dog and owner collection.

### Protection from the elements

From waterproof and warm clothing to protect pets in cold, wet conditions to boots and paw wax to safeguard feet from environmental hazards, many pet accessories are now created with health and well-being in mind.

Oregon-based Ruffwear launched its Furness coat, an ultrawarm, high-coverage jacket for the coldest conditions. Its Vert™ jacket has extended waterproof coverage and is insulated.

[▶ SEE NEXT PAGE](#)



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Pet parents are increasingly concerned about the safety of their pets, particularly for cats out at night and dogs on dark winter walks. Collars, leads and harnesses using reflective or high-viz materials have grown in popularity, as have safety lights that can be attached to collars to maximize a pet's visibility.

Musher's Secret is a food-grade wax that provides a 100% natural, breathable barrier to protect animal paws. Originally developed in Canada for sled dogs, it is now used worldwide in many different environments to guard against snow and ice, rough terrain, hot pavements and sand burn.

### Clean and hygienic paws

Boot Buddy, the producer of a portable footwear cleaning gadget, has now released a pet version, which is proving to be very popular.

The Paw Buddy 2.0 is an all-in-one cleaning tool that can be used anywhere to clean a pet's feet. In addition to keeping mud out of the car and off home interiors, there is an important welfare aspect to consider.

Dogs can pick up material on their paws during a walk that can later be ingested if they are allowed to lick them clean. Salt residue on roads, lawn fertilizers and bacteria or fungus lurking in soil all have the potential to make a pet unwell if consumed.

### Making use of tech

Advances in technology for humans are filtering down to benefit pets, and this is reflected across the winter accessories market.

American company K&H Pet Products launched a new line of heated pet beds a few years ago. It uses a patented heating system that is safe for pets and relatively energy efficient. K&H also produces a thermostatically controlled water bowl that dogs can use outside without the danger of their drinking water freezing.

Dutch brand Stoov began keeping humans warm in 2014 with its invention of a portable heat source. When customers began telling the company that their pets were taking over their heated cushions, it decided to launch a pet version last year, the Woov.

***Fashion brands have recognized the value of the 'hound pound' and have started extending their product ranges to pets.***

Cordless and providing up to 6 hours of warmth at a time, the Woov cat and dog bed has proved to be a big hit.

"It's not just about keeping warm when it's cold. It's about making sure your dog's comfort and well-being needs are catered for as well," says Stoov founder Teun van Leijsen.

### An eye on sustainability

Pet players are also adapting to current sustainability demands. Stoov aims to minimize unnecessary harm while maximizing warmth and, by reducing emissions and water usage, it intends to be carbon neutral by 2030.

All Stoov's products are made using rPET – recycled plastic made from repurposed waste – and the company packages and transports its products in the smartest ways possible.

Ruffwear is working with the Climate Action Corps and other brands in the outdoor industry to become the world's first climate-positive industry by 2030.

Since 2022, the brand has been working to eliminate the use of certain unsustainable substances across its product line. From this year, all products with a water-repellent finish will be approved by the bluesign® system, which helps suppliers source safer alternatives to traditional harmful chemicals used at the beginning of the production cycle. ♦







Love Pet Alliance PORTUGAL

## Fast-growing distributor launches award-winning brands

Based in Portugal, Love Pet Alliance is a fast-growing worldwide producer and distributor that has developed its own brands, such as Dashy and Weego.

Since being founded in 2013, Love Pet Alliance has been committed to being a trusted choice with innovative solutions, high quality, and natural and sustainable products that guarantee pets' well-being.

Last year, the company created its own R&D team and started to produce innovative products of its own, such as dog chew toys and pet food based on single-protein grain-free recipes.

### Holistic approach

The company distinguishes itself through its holistic approach, putting pets at the center of everything it does. Its high-quality products are simultaneously natural, innovative and environmentally responsible.

### Eco-fashion accessories

Dashi was the first brand developed by the company. Launched in 2019, it introduced to the market very colorful and unique designs for pet accessories. Dashy progressively adopted a sustainability-

aware approach, such as by incorporating the use of fully recycled materials. This led to the evolution of what could be called an 'eco-fashion' concept.

### Cat litter

Determined to go further in the cat litter market, the company subsequently launched the Weego brand. Over the past 4 years it has risen to the top, and is now one of the bestselling cat litters – not only in markets such as Portugal and Spain, but also in South American markets such as Chile, and in African countries like Angola.

Weego is one of the whitest and most absorbent cat litters on the market. Its price point makes it one of the best options in terms of quality/price ratio.

### Award-winning pet food

Under the umbrella of the Weego brand, Love Pet Alliance launched a range of natural pet food for dogs and cats. The most advanced recipes of Weego's

hypoallergenic grain-free dog food contain a single protein, which is very helpful for pets with allergies to specific proteins. In Portugal, this grain-free dog food formula was awarded the ConsumerChoice 2024 Quality Award Prize for Grain-free Pet Food.

Most recently, new complements such as salmon oil and snacks have been introduced onto the market under the Weego brand.

### Global expansion

By its 10<sup>th</sup> anniversary, Love Pet Alliance had active distribution in over 20 countries. With its eye on further global expansion, the company is continuing to work closely with distributors and retailers around the world. ♦

**Interzoo: Hall 1, Booth 1-511**

**Love Pet Alliance**  
[lovepetalliance.com](https://lovepetalliance.com)



Country report: Portugal

# Portuguese pet food producers tap into potential



**A shift in pet owners' focus to quality and health is driving growth in the Portuguese pet food manufacturing sector. However, the local industry is not without its challenges.**



**Teresa Mendes**  
*Contributor*  
*PETS International*

As pets have become cherished members of Portuguese households, their numbers are soaring. According to the Portuguese Pet Information System (SIAC), the country has 4.19 million registered pets to date, including over 3 million dogs.

## A nation of pet lovers

These figures are echoed by the TGM Global Pet Care Survey 2023 – a study that involved 40 countries and over 15,000 consumers. It found that a remarkable 72% of households in Portugal own at least 1 pet, which far surpasses the global average of 58%. Dogs hold a prominent place, accounting for 61% of the total. Cats follow, with 54% of Portuguese households owning a feline companion.

## Manufacturing on the rise

Although relatively small, the country's pet food manufacturing sector has shown consistent growth. From 2018 to 2022, the total number of companies involved in this industry nearly doubled, from 8 to 17.

Statistics Portugal concludes that the local pet food industry hit €133.3 million (\$145.3M) in revenue in 2022, up from €40.7 million (\$44.3M) in 2019. Some of the key local producers include Sorgal Pet Food (part of the agro-food group Soja de Portugal), Avenal Petfood and Ovargado.

## Sales market dynamics

The sales market is also showing positive signs after a 1.9% decrease in performance in 2021-2022. According to Euromonitor International, Portuguese pet parents spent an estimated €612.2 million (\$667.2M) on looking after their animals in 2023, [▶ SEE NEXT PAGE](#)



an increase of €1.8 million (\$2M) against 2021. Most of the expenditure goes to food (76%), followed by pet care and other supplies (23.5%).

Euromonitor International concludes that the local pet care market grew by 2.2% between 2022 and 2023, mainly triggered by record growth in pet food (+2.5%) since the pandemic. However, this growth came at the expense of pet products, which grew by only 1.2% compared to the 2.6% recorded in 2020-2021.

Jorge Amorim Moura, CEO of Ornimundo, a chain of specialty animal stores, estimates that the retail market is growing at an average rate of 4% to 6% per year. The market’s focus is mainly on dogs and cats, which account for over 80% of sales.

Supermarkets remain by far the most prominent channel by sales volume (65.6%), followed by specialist pet stores (21%) and online (17.2%). According to the Portuguese Association of Traders of Products for Companion Animals, there are approximately 3,000 establishments selling pet products.

Most of them are small and medium-sized enterprises (SMEs) and family-owned. Together, they generate a yearly turnover of €250 million (\$272.5M) and they employ around 10,000 people.

As for the services available, veterinary services are most popular (79%), followed by grooming services (5%), and pet training and behaviorists (2%).

**Pet food: quality before price**

In an era where financial considerations carry increasing weight, it is natural that expenses related to pet ownership can put significant pressure on consumers’ wallets. Nevertheless, according to the TGM Global Pet Care Survey 2023, pet food buyers continue to prioritize quality as their main concern, followed by price.

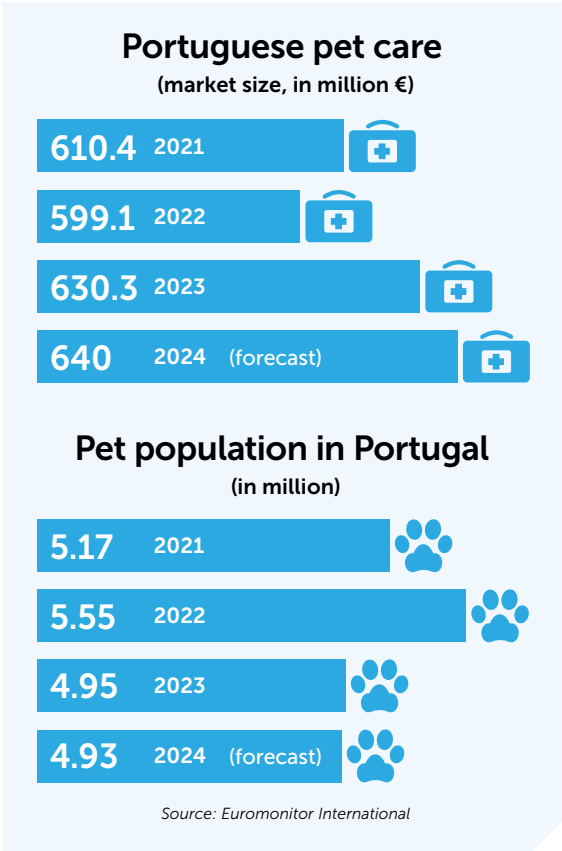
When choosing food for their pets, some consumers prioritize products that meet specific needs or health considerations. This is particularly noticeable among the 55 to 64 age group, with 64% of respondents showing a strong inclination towards such pet food. In line with the humanization trend, pet parents are

increasingly interested in buying natural foods for their furry friends, and various Portuguese companies are tapping into this potential. One example is Purrm, which has created 100% natural cat food without additives or preservatives and delivers within 24 hours.

“In the beginning, we started with Biologically Appropriate Raw Food (BARF) recipes. But since cats are particularly picky with food, we decided to semi-cook the ingredients slowly to not lose essential nutrients and at the same time increase the palatability of our recipes,” explains CEO João Campaniço.

**Sector challenges**

Despite these positive developments, the sector is facing a number of challenges. One is the high level of value-added tax (VAT) that currently applies to pet food products. The Portuguese Association of Manufacturers of Compound Feeds for Animals (IACA) advocates for this rate to be reduced.







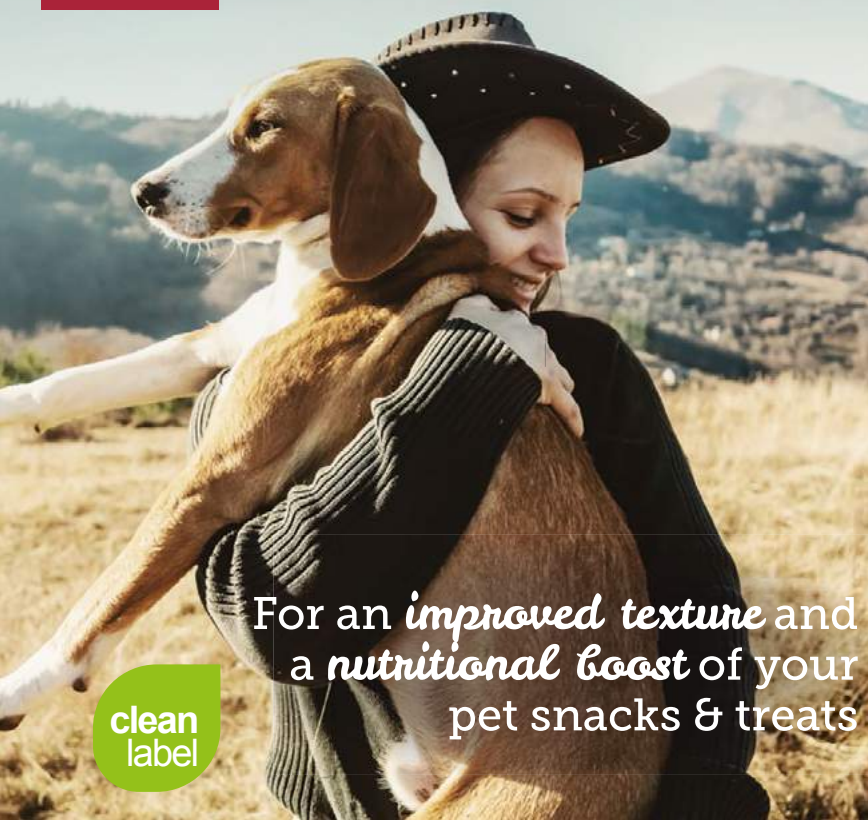
The association's Secretary General Jaime Piçarra considers this measure essential to fight against the abandonment of dogs and cats. "There is a need to reduce the VAT on pet foods, currently at 23%, to 13%. And we are not even asking for 10%, which is the level in Spain," he states.

Another concern for IACA is the ecological footprint of pets. Manufacturers are taking several steps to minimize this, including using local raw materials and those otherwise considered waste. Piçarra also mentions that IACA is studying alternative proteins – including algae and insects – as a strategy "to contribute to making pet foods increasingly sustainable with the least possible environmental impact".

This is precisely one of the objectives of InsectERA, a project funded by the Recovery and Resilience Plan (PRR) with €60 million (\$65.3M) for the next 3 years. It aims for Portugal to have a cluster in insect production and become a market leader in the field. ♦



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# Pet parents and insect-based pet food: recipe for a great love story

**A consumer survey powered by YummyPets reveals how pet parents feel about insect proteins in pet food and shows the high potential of such alternative protein sources in the industry.**



**Chloé Champion**

*Pet Food Business Development*

*Agronutris*

*agronutris.com*

With the pet food market growing fast, more high-quality sustainably produced proteins are needed to respond to pets' nutritional needs. Alternative proteins, including insects, could be key in the development of the pet food sector. A high-quality animal protein with a limited impact on climate change and biodiversity can allow the pet food industry to thrive and grow in a sustainable way.

With over 75% of pet parents reading the ingredient list when they buy pet food and over 60% stating ingredients are their first selection criteria, the acceptance of insects by pet parents is key for the development of this alternative protein.

An online quantitative consumer survey was conducted by YummyPets in the summer of 2022 in the UK, France, Belgium, Canada and the US. Over 2,000 respondents were asked their opinions on insect proteins in pet food. Only 3% of those surveyed were currently feeding an insect-based diet to their pet.

## **Insects for the planet**

Pet parents understand that insect proteins can contribute to lowering the carbon footprint of a pet food product.

The survey highlighted that most pet parents agree that insect-based pet food is a meaningful way to address environmental concerns. A stronger consensus was seen in France and in Belgium (84% to 87%); while the US displayed more mixed opinions (62%).

## **Communicate and educate**

Most pet parents surveyed were not using an insect-based diet. Though they were willing to try, they felt they needed more information before introducing insect protein into their pet's diet. Brands using insect-based ingredients need to continue the work of communication and education to increase acceptance.

The perception of potential health risks of pets consuming insect ingredients varies greatly across countries. French and Belgian pet parents most trust insect-based food with only 32% and 34% of them thinking insects represent a health risk to their pets.

In the UK (74%), and even more so in the US (86%), the majority of pet parents think eating insects could pose a health risk to their pets – further highlighting the need for more information.

## **On the way to acceptance**

The main obstacles to pet parents' acceptance of an insect-based diet for their pets are their doubts about its nutritional value and perceptions that it is 'unnatural' and 'disgusting'. Pet parents of all 5 countries surveyed mentioned the famous 'yuck factor' of eating insects.



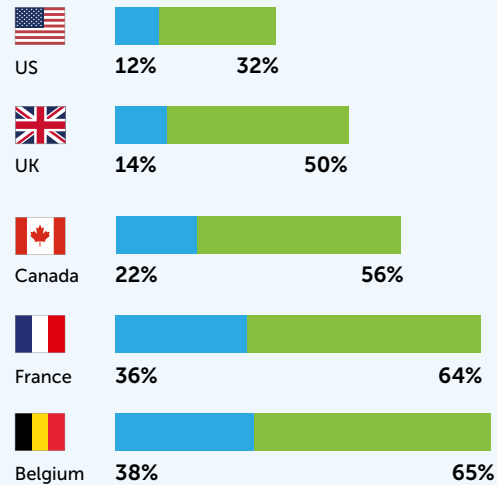
And, while it can be expected that the other 3 reasons preventing pet parents from switching to an insect-based diet (national qualities, 'naturalness', health risks) can be addressed by communication and education, time and habit may be the only remedies to lessen consumer disgust.

### Future of insects in pet food

Insect-based ingredients are part of the pet food industry's strategy to meet a growing demand, as well as meeting sustainability expectations and regulations. This survey provides a better understanding of acceptance drivers for insect-based diets in pet food.

It highlights that the path toward greater adoption of this novel protein source includes educating pet parents as to the safety and nutritional benefits of these ingredients. ♦

### Pet parents' acceptance of insect food



Would you be willing to:

- ☐ eat an insect-based diet yourself? ☐ feed an insect-based diet to your pet?

Source: YummyPets

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# Alternative proteins in pet food: a scientific review

**Veganism and sustainability are hot topics in both human and pet nutrition. But can dogs and cats thrive on diets using unconventional protein sources?**



**Sarah-Jane Molier**  
Veterinary Surgeon

There is growing consumer concern around more traditional pet foods, from the perception that they are 'unnatural', to their ecological footprint and ethical considerations around the welfare of farm animals. This has led to the consumer-driven development of alternative pet foods containing substitute protein sources.

## Emerging alternative protein sources

There are a growing number of pet foods using non-traditional sources of protein. But are these diets suitable for dogs and cats long term?

### Vegan diets

Owners often prefer to feed their pets in alignment with their own dietary preferences and ethical beliefs. This often results in pet food trends following human diet trends, and veganism is no different. Vegan pet diets are a relatively new concept, meaning there are

no large-scale studies on the effect of plant-based diets on health markers dating pre-2020, and none studying long-term effects.

The first large-scale study was in 2021, when 1,325 questionnaires were completed by cat owners. The study, reported in BMC Veterinary Research, was subject to both bias and methodological limitations, so could only conclude that "cat owner perception of the health and wellness of cats does not appear to be adversely affected by being fed a plant-based diet".

In response to this study, and the resultant media storm, the British Veterinary Association (BVA) released a statement stating: "Cats are obligate carnivores and should not be fed a vegetarian or vegan diet as they require animal-sourced ingredients to provide

***Vegan pet diets are a relatively new concept, meaning there are no large-scale studies on the effect of plant-based diets on health markers dating pre-2020.***



***The farming of insects has a lower carbon footprint than that of conventional farm animals, such as chickens.***

essential nutrients, such as taurine and preformed vitamin A, which are minimal or even absent in plant ingredients.” The BVA also expressed concern as to the bioavailability of supplements added to vegan diets, and whether they could adversely affect the action of other nutrients.

A 2022 study from researchers at the University of Winchester in the UK surveyed 2,639 dog owners with the aim of assessing whether health outcomes vary between dogs maintained on vegan or meat-based diets.

A similar, more recent study (by the same authors) surveyed 1,418 cat owners. The studies claimed that both dogs and cats fed nutritionally sound vegan diets are healthier overall than those fed conventional meat-

based diets; with owners reporting reduced veterinary visits, medication use, health disorders and severe illnesses.

However, there were multiple limitations to both these studies, including their subjective nature and the potential for owner unconscious bias. Additionally, the diets were not fed exclusively – in the case of the cats, around a third may have been hunting themselves, or also eating elsewhere. Furthermore, very few of the results were statistically significant. A low percentage of the owners surveyed were feeding vegan diets. Many of the pets in both studies also received dietary supplements.

A 2020 study from Brazil looked at the macronutrient, fatty acid, amino acid and essential mineral content of vegan dog and cat foods on the Brazilian market, and compared the results with European pet food body FEDIAF and Association of American Feed Control Officials (AAFCO) recommendations.

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The exact protein requirements of dogs and cats vary depending on age, activity levels, any underlying medical conditions and the quality of the protein.

#### ◆ **AFFCO guidelines**

Cats preferentially use protein as an energy source, meaning they have a greater dietary protein requirement than dogs. According to AAFCO guidelines, adult dogs require a minimum 18% protein as dry matter (or 45g per 1,000 kcal ME), whereas adult cats require a minimum 26% protein as dry matter (or 65g per 1,000 kcal ME). Interestingly, kittens not only have greater protein requirements for growth, but they are also more affected by the quality of the protein (and amino acid profile) than adult cats.

#### ◆ **Biological values**

The 'biological value' of a protein source is the fraction of amino acids that are absorbed, retained and used by the body (i.e. not excreted). So, the biological value assesses the number and type of essential amino acids and the digestibility of

a protein source. The lower the biological value, the more protein a diet must contain to meet the essential amino acid requirements. Protein from animal sources has a higher biological value than plant-based proteins.

#### ◆ **Cats are obligate carnivores**

Cats cannot gain all their essential nutrients from plant material. Cats and dogs need 10 essential amino acids from their diet: arginine, histidine, isoleucine, leucine, lysine, methionine, phenylalanine, threonine, tryptophan, and valine. Unlike dogs, cats also cannot synthesize taurine, meaning they rely solely on dietary sources for this, too.

#### ◆ **Importance of taurine**

Taurine deficiency in cats can lead to serious health issues, including heart disease and retinal degeneration. Plant-based protein sources lack taurine, meaning cats' diets must contain some animal-based protein. Alternatively, the diet must be supplemented with taurine, but this comes with concerns as to bioavailability.

The study found that all the foods analyzed had at least 1 nutrient below the recommended levels, raising concerns about dietary deficiencies in vegan pet foods. A similar study back in 2004 looked at 2 commercially available vegan cat diets and found that both diets had multiple nutrient deficiencies when independently analyzed and compared with the AAFCO nutrient profile. Of most concern was that both diets contained insufficient levels of taurine – an essential amino acid.

#### **Insect-based diets**

Insects are a good source of highly digestible protein for dogs and have the potential to be useful as a novel protein source for hypoallergenic diets.

However, the nutritional composition of insects varies depending on species, diet and stage of the lifecycle. There are also some concerns over the level of manganese (a trace mineral) in insects, and their potential to harbor microorganisms such as bacteria and parasites. At present, there are limited studies in dogs and very scarce information for cats, so more studies are needed to draw accurate conclusions.

#### **Other protein diversification**

While currently rare, 2024 may well see a rise in other alternative protein sources, such as yeast, fungi and possibly seaweed. Cell-cultured meat is also predicted to consolidate in the pet food market this year.



### Sustainability and ethics

Plant-based diets for humans are considered better for the planet, with lower greenhouse gas emissions, and reduced land and water use. However, it's worth noting the counter-argument: that the meat used in pet food is often the by-product of the human food chain. This can be viewed as a sustainable way to use protein with high nutritional value, which would otherwise be wasted.

Furthermore, plant-based ingredients can come with higher air miles and contribute to deforestation. In the case of cats, there is also the ethical consideration that comes with enforcing a vegan diet on an obligate carnivore.

The farming of insects has a lower carbon footprint than that of conventional farm animals, such as chickens. However, studies are lacking on large-scale insect production, meaning the overall environmental impact of insect farming is unknown.



### More evidence needed

The future looks promising for vegan dog food and insect-based diets, with the vegan pet food market predicted to reach a value of almost \$16 million (€14.6M) by 2028. However, large-scale studies using objective data, such as laboratory results and veterinary clinical assessment, are needed to assess the safety and potential benefits of these diets. The jury is still out on vegan cat food, which has become a highly emotive topic, but the overriding opinion currently is that vegan diets are not suitable for felines. ♦

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# Plant proteins in pet food: making the right choices in terms of nutrition, functionality and sustainability



Meat proteins are still the main ingredient in dog and cat diets. How can plant proteins support traditional diets in terms of nutrition, functionality and sustainability? Consult this checklist to find the best solution.



**Katarzyna Świrkowicz**  
*Pet Business Development Manager*  
Livalta  
[livalta.com](https://livalta.com)

## Plant protein checklist – key requirements:

**Sustainability:** Regional, circular and responsibly sourced ingredients support sustainability. Knowing the CO<sub>2</sub> emissions, water consumption or terrestrial acidification of an ingredient helps in making the right choice.

**Nutrition:** Knowing the amino acid (AA) profile is essential to check if some AAs need to be supplemented. Some plant proteins can provide an almost equivalent AA profile to meat. Also, plant proteins can help reduce ash content while maintaining protein levels.

**Functionality:** The manufacturing process can be more efficient due to techno-functional properties of plant-based ingredients such as emulsifying and water/oil holding capacity. This can improve mixing and create

a stable emulsion that will reduce cooking/extrusion time. Improving kibble/chunk quality also reduces product loss in handling and storing.

**Palatability:** The taste of plant proteins can be a concern – some can be bitter or have a strong aroma. Palatability assessments and preference trials are crucial in building confidence in plant proteins (especially in vegetarian or vegan diets).

**Color:** Pet owners tend to choose a more meat-like color for pet food. Some plant ingredients can turn kibble/chunk green, red or yellow. Choosing a plant protein that won't impact color might be important for customer perception.

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# Is torula yeast the next core protein in pet food formulation?

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**Ricardo Ekmay, PhD**

Senior Vice President - Research & Development - Arbiom  
[rekmay@arbiom.com](mailto:rekmay@arbiom.com)

Necessary reductions to environmental footprints steer manufacturers towards the use of highly palatable but consumer unfriendly byproducts, or sustainable but often unpalatable products.

## More than an additive

As sustainable products such as plant-based meals can often have a positive impact on digestive health and well-being, additives become critical to balancing producer and consumer needs.

We can apply palatants to improve the sensory experience, or postbiotics to improve digestive health. What if we could achieve greater sustainability without the need for such additives? Yeast has often been used for these purposes, but its use as a core protein source should be revisited as a solution.

## Palatability combined with sustainability

Torula yeast, much like its more famous counterpart, brewer's yeast (*Saccharomyces cerevisiae*), is a single-celled organism with an excellent flavor profile that often mimics meat and cheese.

Recent studies in cats favorably positions torula against chicken meal (Holt and Aldrich, 2022). Torula can offer significant environmental advantages through its ability to use a wide breadth of feedstocks to create high-quality protein without the need for genetic modification.

Published LCA studies also favor torula yeast compared to soy protein or methanotrophic bacterial meal in an aquaculture setting (Couture et al., 2019).

## Gut health support

Recent research has shown torula has potent anti-inflammatory properties compared to other protein sources, including *Saccharomyces*-based yeasts, insect meals and microalgae (Marzorati et al., 2023). Its enhanced ability to maintain gut barrier integrity has also been highlighted (Verstrepen et al., 2023).

These results are of particular interest since they are driven by mechanisms beyond conventional yeast modes of action, e.g. prebiotic or pathogen binding properties, and are exhibited after an LPS challenge.

In a recent study of Labrador retrievers, researchers found that sub-clinical chronically loose stools also presented with impaired nutrient digestibility capacity (Timlin et al., 2023). A diet containing 10% torula was able to increase nutrient digestibility to near healthy control levels, whereas a diet containing 10% brewer's yeast remained near negative controls.

"As the pet food industry embraces alternative protein sources, SylPro® torula yeast from Arbiom can be the lever to elevate your protein sources and holistically address the future of pet nutrition," states Ricardo Ekmay, PhD, Research & Development at Arbiom. ♦

Interzoo: Hall 5, Booth 5-322





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# What's new in the stain and odor control pet market?



Discover the latest trends shaping the stain and odor pet product section as it evolves to cater to the growing needs of pet owners.



**Muskaan Gupta**  
*Associate News Editor*  
*GlobalPETS*

With pet ownership on the rise, so is the need for products that eliminate pet stains and odors. However, the market is responding to consumer demand with a wave of new and innovative products, including a shift beyond traditional cleaning methods with solutions like tech-enabled odor control, odor-eliminating air purifiers, pet-safe deodorizers, advanced cat litter and stain-fighting cleaning products.

## Research shows demand

According to the National Pet Owners' Survey 2023–2024 by the American Pet Products Association (APPA), 12% of dog parents and 24% of cat parents mentioned odor and cleanliness as drawbacks of pet ownership.

The data from the pet trade association also reveals that 40% of dog owners and 29% of cat owners had a pet stain remover at home in 2022. Wipes, pee pads and fragrance products were also popular among US pet owners.

[▶ SEE NEXT PAGE](#)



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**12% of dog parents and 24% of cat parents mentioned odor and cleanliness as drawbacks of pet ownership.**

According to the data, the use of odor neutralizers among dog owners rose from 39% in 2020 to 42% in 2022. These products were most popular among Gen Z (55%), millennials (51%), and pet owners with small children (50%).

### Fresh to the market

There has been a relative surge in products merging technology with cleanliness. For example, in January, smart fragrance company Pura launched Open Air Tech™ with 8 fragrances for its air diffuser product. This product neutralizes and reduces unwanted odors “at a molecular level”, particularly targeting fabrics, carpets, furniture and pet areas.

Last year, Japanese care product company Sunstar also unveiled the QAIS-air-04, a wall-mounted ‘plug-and-go’ chemical-free air purifier that eliminates bad odors by disinfecting these compounds at the source. The company developed the product after conducting market research that revealed 63% of dog owners cared about the smell of their pets.

South Korean company PalmBee launched an odorless mineral-based product called WIS4PET for companion animals in response to consumers’ demand for sterilizing pet deodorants. This product can be applied directly to pets to eliminate odor-causing bacteria.

### Litter box innovation

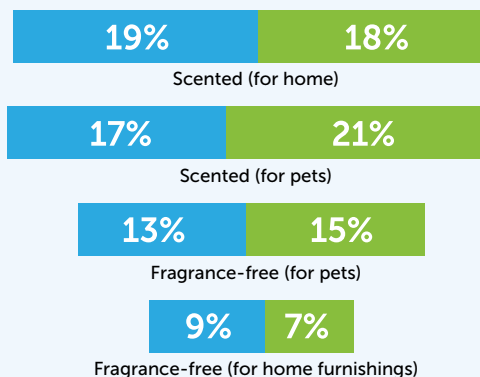
Cat litter companies have continued to innovate in the odor-control product category. BSB Products introduced its OdourLock® maxCare range, which, in addition to locking in foul odors, uses Blücare® technology to allow cat owners to detect biomarkers like blood and glucose, the early signs of urinary disease and diabetes, in their pets’ urine.

Petterm introduced its odor-removing Hidden Cat Litter Boxes last year, which are equipped with artificial plants to blend in with home decor while neutralizing odors.

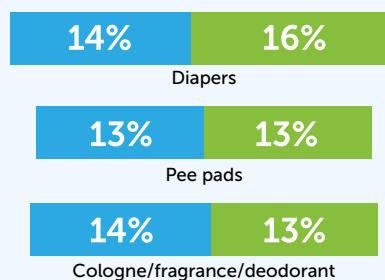
The stain control cleaning product category has seen many launches from pet product manufacturers and the larger cleaning supply industry. Prominent category leaders include Skout’s Honor, Simple Solution under the Compana brand, Rocco & Roxie Supply Co., and Angry Orange. Most recently, pet care brand Oxyfresh unveiled a ‘powerful’ premium pet stain and odor remover to effectively tackle pet messes.

While demand remains high, there is unlikely to be any let-up in the push to create tech-savvy solutions to manage odors and stains. ♦

### Type of odor neutralizer owned by pet parents in 2022 (US)



### Products planned to be purchased in the next 12 months (2022)



Source: 2023–2024 National Pet Owners Survey, APPA

■ Dog owners ■ Cat owners



# Ethical products: a strategic necessity for industry success

How can pet players contribute to prioritizing ethical pro-welfare practices as part of their daily business?



**Esme Wheeler**  
*Science and Policy Officer*  
RSPCA

As the demand for pet-related products and services continues to rise, business-to-business (B2B) pet players must recognize the long-term benefits of following the public's concern for animal welfare and prioritizing ethical practices. As the campaign against the use of shock collars in the UK shows, good welfare is not only the right thing to do, but it could also be good business.

## Promoting ethical training

For 200 years, the UK charity the Royal Society for the Prevention of Cruelty to Animals (RSPCA) has been promoting better and kinder ways of caring for pets and, when necessary, training our furry friends ethically and humanely.

Our campaign against shock collars is a good example of where businesses can make a difference. Depressingly, e-collars are still put on pets to prevent unwanted behavior, in a sad advert for punitive 'training'. These devices deliver electrical stimuli either on demand by remote control or automatically.

These devices can cause pain and distress, actually worsen underlying behavioral problems and can cause anxiety and aggression, creating new problems where none existed.

## Inadequate regulation

But aside from the welfare complications, what statement do these shock collar devices send about how society prioritizes our companion animals? Rather than reward-based, positive training, is it simply okay for owners to knowingly use tools designed to cause pain and fear by electrocuting their pets instead?

In the UK, regulations regarding these devices differ. While e-collars have been illegal in Wales for more than a decade, dog and cat owners are still free to use them in England.

The UK Government has pledged to ban shock collars in England. Last April, the UK's Department for Environment, Food & Rural Affairs (Defra) announced that the Animal Welfare (Electronic Collars) (England) Regulations 2023 would come into force in 2024, consigning the use of electronic shock collars on cats and dogs to history.



Yet, since then, there's been very little news from the British government, and there's a growing fear that officials are rowing back on their pledge amid lobbying from commercial interest groups who want the use and sale of such devices to continue unabated.

### How the industry can help

In the absence of governmental action, could businesses step in and provide the moral initiative?

In the pet world, customers are deeply invested in the well-being of their family pets. Ethical practices contribute to a positive brand image for B2B organizations and foster customer loyalty. When businesses demonstrate a commitment to ethical standards, customers are more likely to remain loyal, make repeat purchases and advocate for the brand within their network.

RSPCA polling already suggests that 89% of UK adults believe electronic collars are a cruel and outdated method of pet training.

### A key differentiator

In a saturated pet industry, ethical behavior can become a key differentiator. Businesses that go above and beyond to act ethically stand out in the market. This differentiation can attract socially conscious clients and partners who actively seek out companies that share their values.

B2B pet businesses should view business ethics and animal welfare not only as a moral obligation but as a strategic investment in their long-term success. In the absence of any government action, we'd like to see all businesses linked to the pet sector no longer stock, promote or sell shock collars. ♦

# 83%

**of British citizens believe  
e-collars should be banned**

*Source: Savanta, interview with 2,274 UK adults, August 2023*

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## BENEFITS OF HYDRO-P PREMIUM

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**For more information about this product, please contact us:**

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# Improving joint health: the role of collagen in pet food

Exploring the benefits of collagen in pet nutrition reveals  
Hydro-P Premium's role in improving canine joint health.



**Esther Prevo, PhD**

*R&D Manager*

*Darling Ingredients International*  
*darlingii.com*

Osteoarthritis is a common joint disease in dogs, characterized by degeneration of the joint cartilage and continuous inflammation. As a consequence, dogs experience pain and lameness in the affected limbs. Dietary components play an important role in managing this disease, by influencing inflammation and wear.

## The role of collagen

Collagen hydrolysates could play a role in the nutritional support of osteoarthritis patients. This dietary supplement provides building blocks for the collagen molecule, an essential part of the joint cartilage.

It is hypothesized that ingestion of collagen hydrolysates supports the renewal of cartilage, and may even reduce inflammation, improving the mobility of dogs with osteoarthritis as well as their welfare by reducing joint pain.

## What is Hydro-P Premium?

Hydro-P Premium is a collagen hydrolysate. Hydrolysis of collagen produces gelatin, and then small peptides. These peptides – collagen hydrolysates – are highly digestible and easily absorbed in the gastro-intestinal tract.

Hydro-P Premium has a variety of uses for pets:

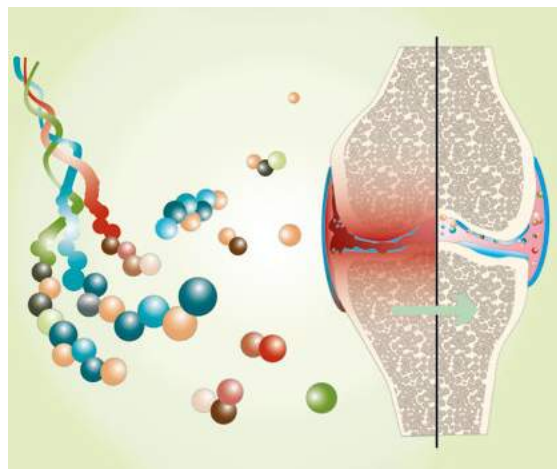
- Supports tissue structure and joint function
- Supports long-term mobility and well-being of cats and dogs
- Maintains healthy skin and coat

## The research

Two pilot studies suggest that supplementing arthritic dogs with Hydro-P Premium can improve the characteristics of mobility, e.g. activity (vitality), stiffness and lameness, and potentially suppress the inflammatory component.

Based on these data, a collaboration was started between Darling Ingredients / Sonac and the University of Utrecht to study the effectiveness of collagen hydrolysates supplied via a Hydro-P Premium enriched pet food to dogs with osteoarthritis (in a randomized clinical trial).

It is envisioned to gain a holistic understanding of the impact of collagen hydrolysates on dog patients with osteoarthritis, both theoretically and clinically. ♦



*After ingestion and absorption of collagen hydrolysates, the released peptides travel to the joint and potentially reduce breakdown of cartilage and mitigate inflammation.*



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# The evolving landscape of extrusion

**Pet food has progressed significantly in recent times, with the process of extrusion required to accommodate new developments.**



**Alexandra Wesker**  
*Pet Food Nutritionist and Formulator*

European pet food body FEDIAF reported 10.5 million tons of pet food products sales in 2023. The majority of this is manufactured through extrusion, mainly dry kibble. In what is a constantly innovating industry, the extrusion process needs to adapt to changes in the content of pet food.

## Benefits of commercial food

Dry kibble has some marked benefits over table scraps. The food is designed to meet specific nutritional requirements and contains only appropriate ingredients. It is also more convenient to serve dry product from a bag that contains multiple servings and can be stored at ambient temperature for long periods.

## Dry versus semi-moist and wet

Dry pet food contains little moisture, commonly between 6-10%. This makes it lighter per meal than semi-moist or wet foods that contain more water: 15-30% and 72-85%, respectively. Transport and storage costs are therefore higher for a wet than for a dry serving.

The higher moisture content also poses a higher risk of microbial growth, requiring mitigation through preservatives in semi-moist products.

Wet food is sterilized after the packaging is fully sealed and deteriorates quickly once opened. Wet food is generally more palatable to pets than dry food. The use of brewer's yeast and other ingredients that aid palatability is common in dry food.

## Raw meat inclusion

There has been an increase in raw or frozen meat materials being added into dry kibble formulations, which then needs twin screw extruders to handle the material.

These higher inclusions are advantageous for labeling, which is based on the 'mixing bowl principle'. These high-moisture materials weigh in at a higher inclusion and are therefore declared earlier on the label – irrespective that they get cooked and dried down to the finished kibble. The ash and calcium content of raw meat materials is also lower than for meat meals, which again allows for higher inclusions.

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**Solano Pet Care** ISRAEL

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***After extrusion the kibbles are dried to the final moisture levels, coated and bagged into consumer packaging.***

However, the high moisture content of such meat materials needs to be transported to the manufacturing plant, which adds costs and in itself gives challenges for contingency planning. The resulting high crude protein content – up to and around 40% – is nutritionally excessive.

### Declaration of meat materials

Inclusions of raw meat materials are usually declared as ‘freshly prepared’ and limited to 36% maximum. Together with meat meal, the total meat or animal-derived inclusions can easily exceed half the declared values. This opportunity has seen some brands in a race to the extreme with 75-90% inclusions of animal-derived ingredients. These cases include animal fat, animal digest and fish within the claim.

Claims referencing ‘meat’ or ‘meat content’ can only be made specifically about skeletal muscle, whereas reference to ‘meat and animal derivatives’ encompasses meat and all products and derivatives of the processing of the carcasses of warm-blooded land animals.

Fish and its parts or derivatives would be referenced as ‘fish and fish derivatives’, or more targeted to the species and format.

### Allowing sufficient cook

After the raw materials have been mixed, they move to the conditioner to be formed into a dough through the addition of water and steam. This spends a few minutes at a specific cooking temperature. Cooking continues into the extruder through sheer or mechanical energy, pressure and further steam addition. The extruder and conditioner settings affect bulk density and palatability.

After extrusion the kibbles are dried to the final moisture levels, coated and bagged into consumer packaging. The entire cooking process is required to gelatinize starch and denature proteins, thereby enhancing digestibility of the food. It is also the killing step for microorganisms including Salmonella.

### Opportunities and limitations

Plant managers become familiar with their specific extruders over time. Manufacturing plants can therefore optimize the unique set-up of their facility. I have heard of extruders struggling with certain levels of gluten or starch sources, whereas other extruders have no problem handling more challenging levels of the same materials.

There are manufacturing opportunities as well in lowering energy costs by choosing materials that improve cooking or reduce drying energy.

The choice of starch source (required for binding) can be decided on with a degree of influence by consumer perception. Traditional sources include wheat and barley, whereas rice is more upmarket. For grain-free recipes, potato, pea and tapioca are often used. Recipes high in meat do not have much space for starch, resulting in dark, dense kibbles due to the lack of expansion.

### When push comes to shape

Extrusion is the process of funneling a substance with force through a hole or die, with the shape of the die determining that of the extrudate. Dry kibbles are formed by cutting the extrudate into very short sections.

A different concept, such as textured vegetable proteins (TVP), are also manufactured using extrusion technology. It can make vegetable proteins look like shredded chicken breast, and offers opportunities for fresh, frozen or wet food recipes that want to create a chicken-like appearance in a non-meat formulation.

### Configuration matters

The shape of the kibble is targeted to the animal. For example, some shapes are better picked up by the tongue of cats, others are better suited to short snouts. Others can be comfortable for some mouths but in others cause discomfort that can lead to rejection.

More practical considerations include wanting to ensure an even distribution of palatant, or preventing breakage of kibbles due to a delicate structure. ♦





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# How is inflation still affecting pet owners' spending habits?



**The simple answer to the question is yes. But how consumers are dealing with higher prices for their pet products and services varies according to country.**



**Paula Flores**  
*Contributor*  
*PETS International*

Inflation was one of the hot topics and a concern for consumers in 2023, with devastating effects for 1,000s of pet owners. As price hikes slowly ease around the world, it was time for a new survey – to assess whether inflation remains a concern for pet parents. Findings show that this definitely is the case, with almost a third of consumers reducing their spending.

## Effect on household finances

A recent PETS International survey, conducted in partnership with Yummypets, of 945 pet parents from France, Canada, the US and the UK, concludes that nearly 8 out of 10 consumers (79%) are fully aware of the economic crisis and its impact on the cost of living.

Unsurprisingly, 85% of them also say that the crisis affects their household's financial situation, with people in the UK the least likely to be impacted in their finances (79%).

This has also influenced consumers' spending habits, with 29% reducing their spending. Pet owners in the US (43%) and Canada (40%) are the most likely to feel the strain, so they're decreasing their spending on items such as food, treats or toys.

French consumers, on the other hand, are the least likely to feel any impact, with 62% stating that they have even increased their spending. Pet parents in France are also the least likely to cut down on the amount of food they give to their pets (7%).

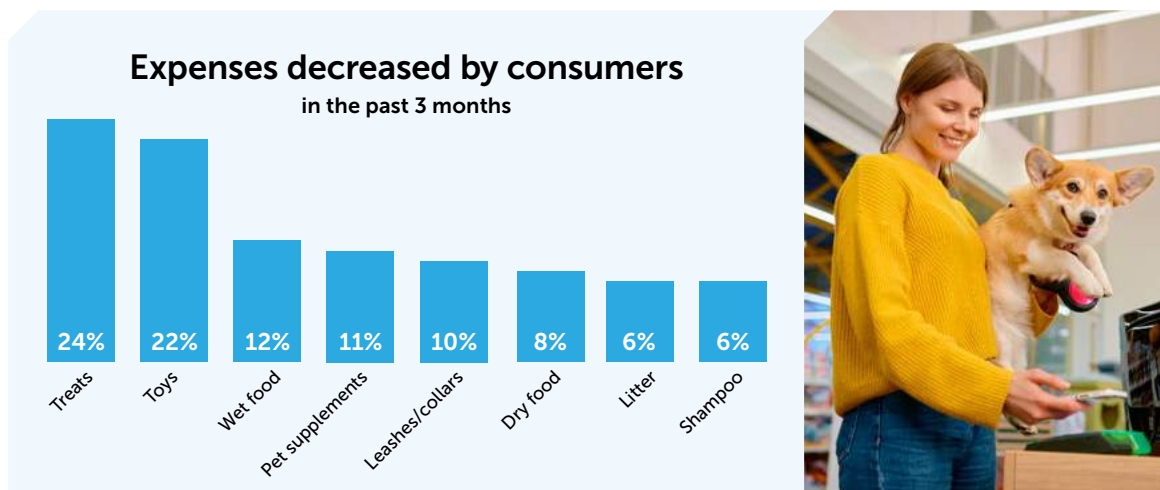
## More affordable options

Overall, 8 in 10 consumers (82%) say they are not reducing the amount of food they give their pets. Despite that, nearly half (48%) admit that the impact of the economic crisis influences their decisions about whether or not to buy more affordable options.

The PETS International and Yummypets research found that the strain is particularly felt in North America, where 54% of US and Canadian

[▶ SEE NEXT PAGE](#)





pet owners have switched brands or are considering doing so. Americans are also more likely to reduce the amount of food they give (25%) due to the economic crisis than people in other countries.

By contrast, only a third of French consumers (34%) consider more affordable options due to the effect of the crisis, and they are the least likely to even consider switching brands (61%).

### Cutting down on treats and toys

Despite not cutting back on essentials such as food, many consumers do look at reducing expenses that are not absolutely necessary.

According to the survey, the categories where pet parents are cutting down their expenditure the most are treats (24%) and toys (22%), followed by wet food (12%) and supplements (11%). Interestingly, this is a trend where there are no differences between the 4 markets.

### Vets not immune

There is no doubt that pet owners will go to great lengths to care for their pets, but vet bills have increased in many countries, putting a further strain on consumers. American pet parents are the most likely to reduce their trips to vet clinics (37%), followed by people in Canada (30%) and the UK (20%).

**Nearly 8 out of 10 consumers (79%) are fully aware of the economic crisis and its impact on the cost of living.**

Here again, French consumers are the ones most likely to maintain their current habits. Still, many pet owners have reported cutting back on vet services, particularly vaccinations. As one of them said: "I no longer vaccinate my oldest cat. He doesn't leave the house anymore."

In the UK, many respondents mention the importance of insurance and how that helps with their vet bills.

### Pet services feel the pinch

With so much pressure on consumers, pet care services such as grooming, pet sitting and dog walking have also been impacted to some extent.

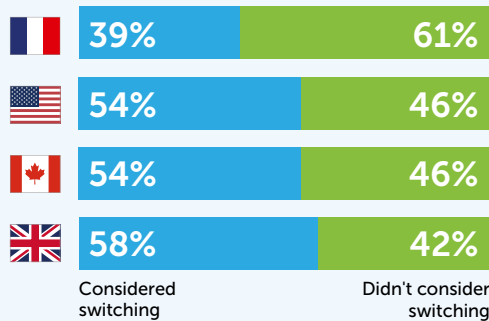
Globally, 37% of respondents have cut back on the use of these services. It is in the US that these services have suffered the most, with 43% of consumers cutting back on this type of expense. Dog owners are also more likely (44%) to reduce their use of these services than cat owners (35%). ♦

Special thanks to *Yummypets*

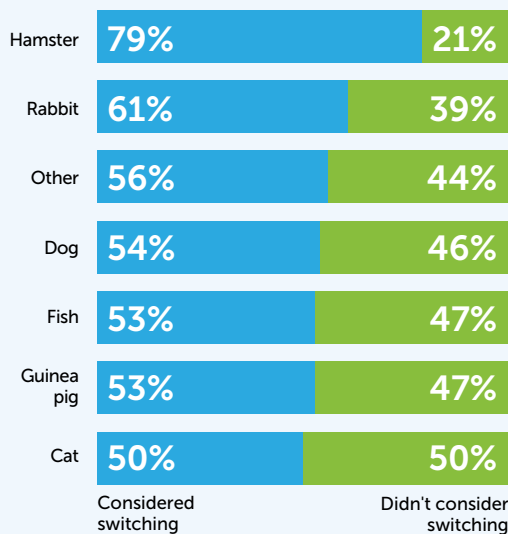


Only the best for  
our loved ones.

### Pet owners who considered switching brand



### Pet owners who considered switching brand (by pet)



### Latest price rise data

In the UK, the consumer price index (CPI) rose by 3.8% in the 12 months to February 2024, down from 9.2% in 2023. As of February, US prices have risen 3.2% (6% last year) and in Canada, they increased 2.8% (5.2% last year). In March 2024, consumer prices in France are expected to increase by 2.3%, down from 6.6% in 2023.



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Almo Nature ITALY

# Going beyond cats and dogs: embracing and protecting biodiversity

At Interzoo, natural pet food company Almo Nature will showcase how the pet industry can help save the planet's endangered biodiversity.

After being absent for several years, Almo Nature is planning on making a splash at Interzoo. The company wants to demonstrate how a pet food company can not only bring the best quality products to market, but also care for the planet and defend biodiversity.

## How it started

In 2000, Pier Giovanni Capellino founded the company to make his dream come true: the world's first wet pet food made from 100% HFC ingredients, i.e. ingredients originally suitable for human consumption. It was a new quality standard that many would follow.

In 2019, one year after the establishment of Fondazione Capellino, Pier Giovanni and Lorenzo Capellino donated 100% ownership and voting rights of Almo Nature Benefit to the Foundation in perpetuity. The Fondazione Capellino is the sole shareholder of Almo Nature and its subsidiaries (the Almo Nature Group). Its motto, 'All profits to the planet', clearly

illustrates the Foundation's core purpose of environmental activism. And anyone who buys Almo Nature products directly contributes to the Foundation's projects.

## Focus areas

The Foundation is active in several different areas: Habitat & Biodiversity Corridors aims to conserve and create new biodiversity corridors with projects in Europe, Africa and South America. The Climate Change activity area studies and implements solutions that help mitigate the effects of climate change.

Biodiverse Agriculture researches models for integrating agricultural production and biodiversity. Impact of Human Activities on Biodiversity is dedicated to defining a universal metric for measuring the impact of humans on biodiversity.

With concerted action to give back to the planet what is taken from it to produce goods and services, Almo Nature sets a virtuous cycle in motion and invites

everyone to follow it – everything must return to nature without damaging it or altering its delicate balance.

## What can you do?

Almo Nature's communication in Nuremberg appeals to the individual animal-loving citizen, but also to companies in the pet food industry, to break the inertia and become aware of their impact on nature and consequently act to help safeguard biodiversity.

We all need to protect biodiversity because we are at a crossroads: many species, including humans, are at risk of disappearing from their habitats and we must prevent this! To do so, everyone must commit to act, without exception. ♦

**Interzoo: Hall 3A, Booth 3A-512**

**Almo Nature**

[almonature.com](http://almonature.com)

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# Catching up with latest developments in the aquaculture sector

**With many new strategic shifts and innovative ventures, the global aquaculture industry is witnessing pivotal movements.**



**Shruti Khairnar**  
*Associate Business News Editor*  
*GlobalPETS*

Driven by rising demand and the need for more sustainable practices, the global aquaculture sector is undergoing many rapid changes. PETS International explores some of the latest happenings in this industry, including acquisitions, initial public offerings (IPOs) and new product launches from North America and India to Africa, the Middle East and Europe.

## The North America scene

One of the latest developments in the field happened last February when pharmaceutical company Elanco Animal Health Incorporated announced its intentions to sell its aqua business to Merck Animal Health for \$1.3 billion (€1.2B) – 7.4 times its estimated revenue in 2023.

The Indiana-based firm wants to refocus on pet health and livestock sustainability while accelerating its debt payments. For Merck, the acquisition means cementing its position as a “leading” aqua health business.

## Interest in Indian business

In the same month, Indian fish processing firm Mukka Proteins made its initial public offering (IPO) debut. The fish oil exporter’s IPO opened to strong demand

and was subscribed 2.47x on the first day of bidding. The company manufactures fish protein products and supplies fishmeal, fish oil and fish soluble paste – an essential ingredient in the manufacturing of aquafeed and pet food.

## South African perspective

South African biotechnology company Maltento announced its plans to focus on the pet food and aquaculture sectors following its \$3.3 million (€3M) fundraiser in July last year.

“We believe that our functional ingredients that are derived from black soldier fly (BSF) add value to the wellness of pets and pet/aquaculture fish species,” the company’s Commercial Director Dominic Malan tells PETS International.

Malan highlights that the company has developed a palatability enhancer that “improves the feed response for companion animals and elicits a more aggressive feed response from fish”.

***A new high-protein product, marketed under the brand name EnPro, will target the UK and European aquafeed and pet food markets.***



"We have seen good growth in the pet food market by improving our palatant formulation, inspired by insects, and our trial results in the aquaculture segment are nothing short of amazing," he adds.

Founded in 2018, the Cape Town-based firm is now looking to breed BSF on agricultural waste to create proteins that can be used in pet food and aquaculture feed.

### Manufacturing in the Middle East

Early in 2023, Oman established the country's first aquafeed manufacturing facility to capitalize on the country's fish wealth and produce fishmeal and fish oil for further use in the pet food market.

The \$20 million (€18.3M) project, Aqua Feed, is funded by 2 of the country's largest fish processing companies. It is part of Oman's 2040 vision to diversify and grow its economy sustainably.

The facility is in the Special Economic Zone at Duqm (SEZAD), which is the biggest in the region, and is expected to be fully operational in late 2025.

### European investment

CropEnergies, a European ethanol producer, invested over €100 million (\$108.9M) last year in the production site of its subsidiary, Ensus UK.

A major part of the investment, to be deployed over the next few years, has been earmarked for the construction of a new unit to produce high-protein animal feed.

This new high-protein product, marketed under the brand name EnPro, will target the UK and European aquafeed and pet food markets. The total investment is approximately €75 million (\$81.6M), and commissioning is scheduled for 2025.

The company qualified this as an "important" development in diversifying its product range. Ensus UK Chairman Grant Pearson pointed out that it will also help address the country's protein shortage. ♦

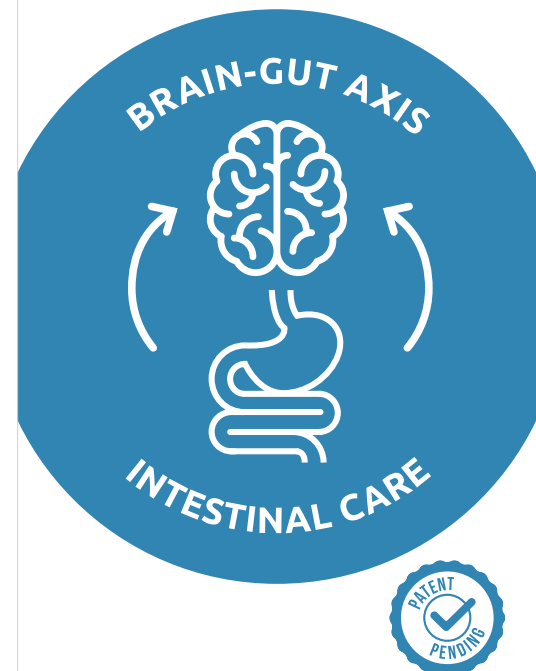
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# Diving into over-the-counter antibiotic use in fish

**In tackling the issue of irresponsible antimicrobial use, collaboration is necessary – including from the aquatic pet industry.**



**Sasha Saugh**

*Contributor*

*PETS International*

The practice of purchasing antibiotics online without a prescription (over-the-counter) for human consumption has been widely documented. However, this issue also extends to animal medicines. In many areas, including the US, the aquatic pet industry provides access to a range of over-the-counter treatments, some of which include antibiotics.

## A sharp warning

In December 2023, the US Food and Drugs Administration (FDA) warned 9 companies in the US for potentially breaching federal law by selling unapproved and misbranded animal antimicrobial drugs without needing a prescription from a licensed veterinarian.

The related drugs were marketed towards minor pet species such as fish, and are important for human medicine. They include major antibiotics such as penicillin and erythromycin.

All approved animal products containing these drugs should, legally, only be obtained via a prescription from a qualified veterinarian – i.e., should never be sold ‘over-the-counter’ in pet stores or online. The stated products had also not gone through the main legal pathways to reach manufacture for marketing, which means that both their safety and efficacy were unknown.

The FDA warned that a failure to act upon these warnings may result in further action such as injunctions to prevent further manufacture and marketing. However, it’s uncertain how other pet fish antibiotics – those not crucial to human medicine – will be regulated.

## Why are unregulated sales a concern?

In the US, unlike for dogs and cats, the acquisition of antibiotics for fish (or other aquatic animals) does not always require a prescription. Customers often buy multiple types, which they use sequentially or in combination under minimal instruction.

Given that, according to statistics from the American Pet Products Association (APPA), some 13.3 million

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## LOOKING FOR DISTRIBUTORS AND PRIVATE LABEL MANUFACTURERS



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households in the US own pet fish, this constitutes a significant market. In contrast, the UK market for ornamental (pet) fish comprises 7 million indoor fish tanks (15% of the population).

Using non-prescribed medicines in pets can have huge effects on both human and animal health for a large variety of reasons. Unregulated use of drugs such as antibiotics can negatively impact the animals' health directly, or indirectly, by affecting the biological filter and ecosystem that sustains the quality of water in which they live.

Without veterinary consultation, ineffective treatment may occur if the correct drug, dosage, or duration of treatment for the correct condition is not followed. Similarly, errors in dosing and application can even lead to significant ill-effect and harm to animal welfare. It's also common for illegally manufactured drugs to lack active ingredients altogether, contain harmful substances, or have mislabeled ingredients or dosages.

Antibiotic resistance is a significant concern whenever antibiotics are used inappropriately, as resistant bacteria are naturally selected, posing risks to both animal and human health. Increased antibiotic use creates more opportunities for the selection of resistant bacteria, emphasizing the importance of using these drugs only under veterinary guidance.

Moreover, a 2020 study showed that people often use unprescribed animal antibiotics for themselves, as seen in online traffic for reviews related to human use, compared to those that are related to pet use. This may have negative repercussions for users.

### Exploring market drivers

One may wonder, what factors are fueling this illegal trade in veterinary medicine? Understanding the causes is often helpful in tackling the effects.

Affordability, convenience of online orders, and limited understanding of antibiotic usage due to level of education or access to reliable information, could all be contributing factors. The anonymity of online transactions and lack of accountability may also make this option more appealing to some. Furthermore, ignorance regarding the illegal nature of the trade cannot be disregarded.

This market stays active because it's easy to make new websites without losing customers if one gets closed. Alternatively, business is maintained by having multiple online platforms supporting a particular merchant or business.

Pet owners accessing such illegal drugs face relatively low legal penalties, and the distribution of small postal packages, compared to larger shipments, largely evades detection.

Regulatory gaps that allow the use of these drugs without a prescription also sustain such behavior. In the US, antibiotic usage is regulated by the FDA and the US Department of Agriculture in larger species such as food-producing animals. However, ornamental fish aren't regulated by these authorities, which creates a loophole.

### A call to action

The growth of e-commerce facilitates the growth of the illegal veterinary medicine market through online pharmacies, online marketplaces, and social media.

However, the difficulty in gaining an accurate picture of the scale of this problem, and the scarcity of up-to-date literature regarding the illegal trade of veterinary medicines, indicates the need for additional research in this area.

The UK has a 5-year national action plan, scheduled to conclude in 2024, aimed at combating antimicrobial resistance. As part of its pledge, the UK intends to conduct additional research into the unlawful sale of antimicrobial products within the country and to shut down websites involved in unlawful online sales.

This applies to both human and veterinary medicine, including pet aquatic animals. However it appears that with respect to animals more resources are directed towards prioritizing this issue with food-producing animals and other companion animals such as cats, dogs and horses that require regular veterinary treatment.

Dealing with these issues requires a multi-faceted approach involving collaboration between the public and private sectors to close regulatory gaps, along with increased awareness of the negative effects of supporting such illegal markets. ♦



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# Taking the temperature of the pet thermometer market

The pet care field is now extending into thermometers as conscientious owners are increasingly keen to monitor the health of their furry companions at home.



**Karen Cornish**  
Contributor  
PETS International

Changes in how owners care for their pets and increased awareness of the importance of keeping an eye on animal health are expanding the availability of medical devices such as thermometers in the pet care market.

## A new approach

The COVID-19 pandemic has significantly impacted how pet healthcare is delivered. In combination with opportunities made possible by the internet, there has been a rise in online veterinary visits. Consultations can now be carried out online using video rather than face-to-face appointments, and the sharing of images and symptoms can often enable a vet to make a diagnosis remotely.

For a virtual vet consultation to be successful, the data provided by the client needs to be as accurate as possible, which is one reason pet owners are beginning to choose high-quality, veterinary-approved thermometers.

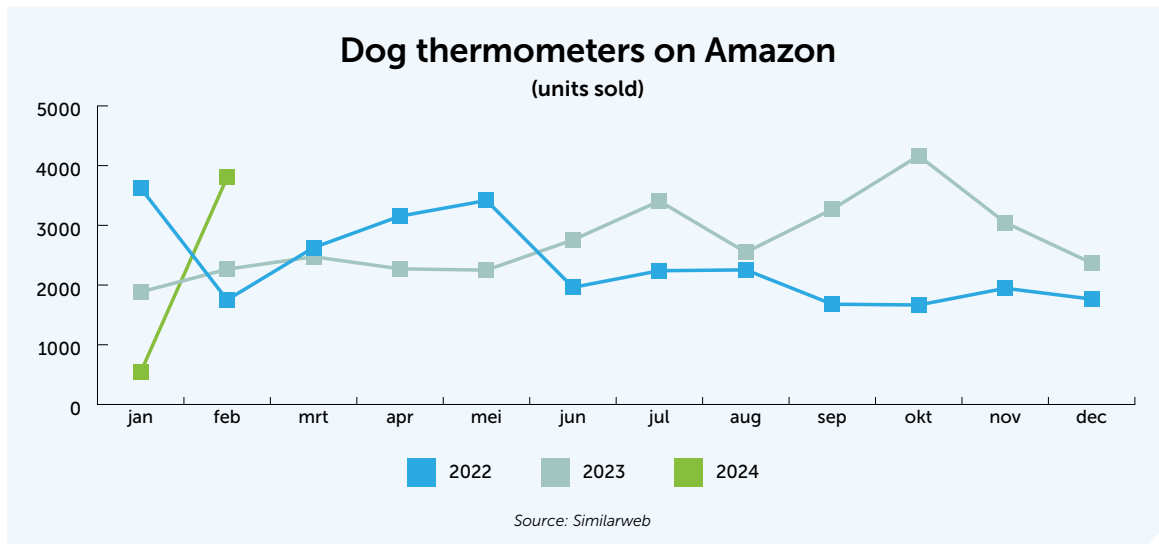
## Digital accuracy

The global pet thermometer market encompasses a range of temperature monitoring tools, including infrared thermometers, wearable devices, digital ear and rectal thermometers and contactless thermometers.

► SEE NEXT PAGE

***Digital thermometers are estimated to make up over half the selection and are considered the most accurate option when used properly.***





***For a virtual vet consultation to be successful, the data provided by the client needs to be as accurate as possible.***

Digital thermometers dominate the market. They're estimated to make up over half the selection and are widely considered the most accurate option when used properly.

iProven is leading the way in digital thermometers for pets due to its ease of use, accuracy and price point. At less than \$20 (€18.44), this rectal thermometer is affordable for most pet owners and has a flexible tip to make using it a more comfortable experience for cats and dogs. This thermometer is also fast, delivering a result in just 20 seconds.

#### Ear thermometers

Ear thermometers, such as the one produced by ICARE-PET, use infrared technology to measure an animal's temperature. They are generally more expensive than digital rectal thermometers, but they are not always as reliable.

To gain an accurate reading, an aural thermometer needs to be inserted close to the eardrum, which can be difficult, especially in the presence of hair, wax and debris in the ear canal.

For owners who don't feel confident taking their pet's temperature with a rectal or ear thermometer, there are non-contact devices, such as the one produced by PetMedics, that can be used by pointing the device onto the stomach area. However, these are generally not as accurate as internal thermometers and may not be reliable enough to inform a vet's examination.

A study published in August 2023 by researchers at the University of Wisconsin-LA Crosse (UWL) compared the use of underarm thermometers with rectal thermometers in cats and dogs. It concluded that axillary (armpit) temperature readings were quicker to obtain and required less restraint from vets – however, the findings did not mention comparable accuracy. ♦







## Perfect Pet GREECE

# Unraveling the success story behind Greece's No.1 company for pet products and services

**As the Greek pet market flourishes, Perfect Pet stands out as a beacon of success. Its journey begs the question: What sparked this remarkable growth?**

Within just 17 years, Perfect Pet has become a market leader in the import and distribution of pet products in Greece. Exclusively representing more than 30 brands, the company paves the way for European and global innovations in the pet industry.

### How it started

Lilian Lykourpoulou and Vasilis Chrysopoulos founded the company in 2006 with a low share capital and a mission to provide high-quality products and services for pets and their owners. The upward trajectory persisted, leading the company to lease and relocate to a 1,000 sq m warehouse in 2009. In 2015, it expanded its portfolio by introducing private label products under the commercial brands Celebrate Freshness, Fury, and Glee.

By 2016, as it celebrated its 10th anniversary, Perfect Pet had firmly established itself as one of the leading companies in Greece's pet industry, renowned for its extensive range of branded pet food products and accessories. Additionally, it had forged

a formidable network comprising 700 specialized partners across the nation.

In 2018, the company took a significant leap forward by further expanding its product portfolio, adding well-known premium pet food brands. This strategic move paved the way for a subsequent relocation in 2019 to a larger facility spanning approximately 4,200 sq m, where automation was introduced to streamline the logistics and sales operations.

### Commitment to excellence

By 2020, Perfect Pet had achieved impressive double-digit growth, boasting a workforce of 47 employees. Its expansive reach encompassed over 1,300 sales outlets across Greece, spanning both mainland and island territories. In 2023, for yet another consecutive year, Perfect Pet achieved a double-digit increase in turnover, surpassing 22% compared to 2022, and exceeding €22 million (\$24M) in revenue.

Moreover, its presence has expanded to over 10 countries through exports and active participation in major European

trade exhibitions. This remarkable growth trajectory, achieved in under 2 decades, has culminated in 2024 with the company's most substantial economic maneuver in the Greek pet market. In January, Perfect Pet made its largest-ever financial investment in the sector, establishing state-of-the-art, privately owned facilities covering a total area of 6,200 sq m. These facilities incorporate industry-leading practices across all production processes, underscoring Perfect Pet's commitment to excellence.

Today, the company employs 60 people, a portfolio that encompasses more than 16,000 product codes and 2,400 private label items across renowned brands such as Egeo, Celebrate Freshness, Perfect Care and Glee.

The company's dedication to Corporate Social Responsibility is notable. Through educational initiatives in collaboration with other official entities and a presence in every particular need that arises, especially after natural disasters, the company effectively showcases its social commitment. ► SEE NEXT PAGE





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### Egeo Pet Food: a gastronomic journey of flavors

Egeo Pet Food is a natural, sustainable diet for pets inspired by the Aegean Sea and a passion for the well-being of furry companions.

To achieve high nutritional value together with exceptional flavor, all recipes combine fish caught in open seas with chicken from controlled breeding farms and other 100%-natural ingredients. This results in products that are rich in animal protein and have a high biological value.

The carefully selected raw materials are suitable for human consumption, while all fishing is carried out without endangering the natural environment and fish populations.

Egeo Pet Food recipes are free from additives, preservatives and artificial colors. Meanwhile, the 'handcrafted' production gives them natural taste superiority and ease of digestion.

What truly sets Egeo Pet Food apart is the steam cooking process, which preserves the nutritional ingredients, enhances flavors and reduces calories, supporting a healthy digestive system. Additionally, hand filleting ensures excellent quality control, guaranteeing optimal quality and a unique gastronomic experience.

With 44 unique product codes, the Egeo Pet Food range combines and presents all the beneficial properties of the open sea. The recipes are available in 4 different textures for cats (Jelly, Broth, Sauce, and Drink) and 1 for dogs.

### Celebrate Freshness: pets' favorite treats

The comprehensive range of treats from Celebrate Freshness is rich in its variety of flavors and textures, capable of meeting

the needs of both dogs and cats, while also rewarding them at any moment of the day.

All Celebrate Freshness treats are low in fat, hypoallergenic, and made with meat as the first ingredient (chicken, turkey, beef, duck, bacon, rabbit, lamb, pork, venison or salmon). They are gluten- and grain-free, and therefore suitable for pets with digestive issues and sensitivities.

This brand umbrella covers a wide variety of salami, produced with a high percentage of meat from excellent raw materials, without additives and preservatives. It also features natural chewable Wild Antlers, and natural handmade cheese bones based on a traditional Himalayan recipe by Happy Yak. The collection is further enriched by fresh Scottish salmon oil. The range is complemented by natural chewable Olive Woods (olive wood sticks infused with olive oil), and Collagen Chews in 3 unique flavors and 3 different textures.

The Celebrate Freshness range was developed following the strictest standards, aiming to provide moments of enjoyment to pet parents' beloved companions while also offering all the necessary nutritional ingredients to enhance their health, well-being and longevity.

### Perfect Care: daily protection and care

Perfect Care is a fully comprehensive range of products for the daily protection, care and hygiene of pet parents' beloved companions. It is accompanied by hypoallergenic shampoos designed to replenish the natural moisture of the skin and coat, as well as wet wipes that are ideal for everyday cleaning. They effectively remove dust, secretions and impurities,

while simultaneously keeping bacteria away thanks to the special chlorhexidine composition they contain.

The Perfect Care range also contains repellent collars and sprays, as well as training pads, all made from 100%-biodegradable materials for maximum care and hygiene. The collection is completed with silicone cat litter (crystalline) and litter made from Greek bentonite, making Perfect Care an everyday ally in the care and maintenance of pets.

### Glee for Pets: a whole world of accessories

Beds, grooming essentials and toys for dogs, cats and birds are available through the Glee for Pets series. The collection consists of a wide variety of designs, colors, textures and patterns, promising to satisfy and enhance the lives of pets by creating a comfortable and carefree coexistence.

The brand's collars, leashes and harnesses promise to transform a walk into a safe and enjoyable experience that combines style and comfort. Additionally, the range features a wide variety of beds, pillows, nests and cooling products capable of satisfying every need for rest and tranquility of beloved pets.

The series is completed with pet carriers, grooming brushes, scratching posts, crates, houses and litter boxes. Meanwhile, the collection of clothing promises to make pet parents' beloved companions happy and content! ♦

**Interzoo: Hall 3, Booth 3-604**

#### Perfect Pet

*[sales@perfectpet.gr](mailto:sales@perfectpet.gr)  
[perfectpet.gr](http://perfectpet.gr)*





# Digging down into pet ownership across Greece

**Some 4 out of 10 people in Greece own at least 1 pet. But what else does research tell us about pet parents in the country?**



**Vasillios Goulielmos**  
Contributor  
*PETS International*

Independent research and policy institute diaNEOsis conducts regular surveys among the Greek population on important issues of our time. Its survey What Greeks Believe also gathers information about the everyday life led by people in Greece today, including some information on pet ownership which could be useful for pet companies.

## Who owns a pet in Greece?

Younger Greeks are the most likely to live with 1 or more pets, and the younger a person is, the more likely that is. Senior citizens are the least likely to be a pet parent. According to Euromonitor, the pet population in the country has been stable at 3.63 million since 2021, with the overall figure forecast to stay much the same in 2024 with only a very slight increase.

## Does income have an effect?

Family income doesn't seem to be a factor in pet adoption. Even people who say they have a very low

income – including those who can't really make ends meet – admit that they have 1, 2 or possibly 3 pets. Multiple pet ownership is slightly more common in this group.

## Most popular pets

Dogs are certainly the most popular in Greece, with two-thirds of all pet households having at least 1. Cats are the second favorite, particularly among the self-employed such as craftspeople. Many Greek pet owners have birds or fish, but there are also homes with small mammals and reptiles.

## Adopting strays

The majority of Greeks who own a pet claim to have taken in a stray from the streets. Adding this to the people who adopt their pets from a shelter, means that more than half of the country's pet owners provide a home for 1 or more stray animals.

***The pet population in the country has been stable at 3.63 million since 2021, with the overall figure forecast to stay much the same in 2024.***



The likelihood of someone buying a pet from a store or a breeder increases in proportion to the family income. Getting a young animal from another family whose pet has given birth doesn't seem to be a popular type of pet adoption. And it's more likely to occur in less urban areas.

About a quarter of all Greek pet owners say that their pet was a gift. As much as a third of the over-55s claim to have acquired their pets that way.

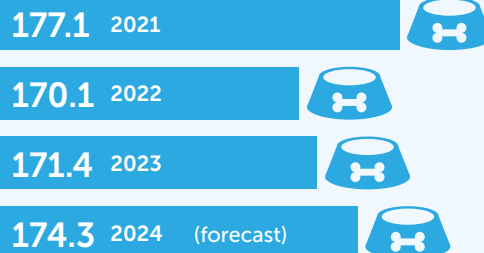
#### Attitudes to pet care

Survey respondents' ideological or political views do not seem to have any effect on their attitudes to pets in general. Regarding care, the vast majority say that they take their pets to the vet. The people who say they don't go – a small percentage – are equally distributed among different incomes and levels of education.

So, this seems to come down to values and lifestyle rather than a lack of information or finances. ♦

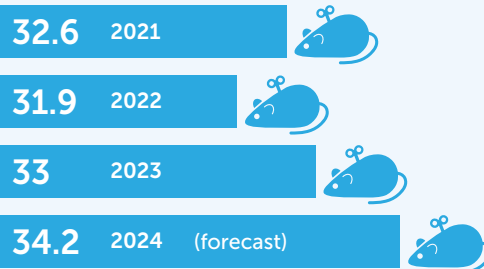
### Pet food

(Greek market size, in million €)



### Pet products

(Greek market size, in million €)



Source: Euromonitor International

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# Pet Supermarket's strategic expansion in Greece's pet sector

A closer look at how this Greek retailer is planning to grow from 12 to 100 stores.



**Philippe Vanderhoydonck**  
Managing Director  
PETS International

In Greece, where 50% of families have a pet, the pet industry presents fertile ground for retailers and brands alike. And Pet Supermarket has captured a significant chunk of this market.

In 1979, Manos Kapiris opened Manos Pet Market, which was rebranded in 2001 when Kostas Kapiris joined. The family-owned business has grown steadily ever since, mirroring broader trends in the Greek pet market while setting its own course for growth and consumer engagement.

## Offline beats online

With 54% of all sales, the dominant channel in Greece is specialty retail, including vets. Around 40% of consumers buy their pet products in supermarkets.

Despite the global uptick in e-commerce, Greek pet owners definitely prefer in-store shopping. This emphasizes the value they place on the expert advice and product buying experience which online platforms cannot yet match.

## Meeting business and customer needs

From its start in the city of Piraeus to its current status as a key player in the pet retail sector, Pet Supermarket has evolved on different fronts. With 30,000 SKUs, including exclusive private labels, the company serves a wide spectrum of pet needs through both consumer-facing and B2B channels.

Its B2B online store makes it easy for pet shop owners to order a large selection of key European brands. And the 3,500 sq m physical store is Greece's first and only cash and carry outlet. For consumers, Pet Supermarket has a webshop and 12 big, welcoming retail stores.



## Expansion and positioning

Under the leadership of CEO Kostas Kapisir, Pet Supermarket has grown significantly. The company saw 24% revenue growth in 2022 and 35% in 2023. By going from 7 stores in 2023 to between 12 and 17 by the end of 2024, the retailer anticipates 50% growth this year.

Retail expansion also reflects a strategic choice to enhance its market footprint. "Greeks love buying in stores. By opening more and more big pet stores, we see an opportunity to grab market share from the supermarket channel. And we'll clearly establish ourselves as a market leader," says the 42-year-old CEO.

While Pet Supermarket's main focus will be on strengthening the store network and in-store experience, online sales are another growth area. Although web purchases are currently a smaller portion of its revenue, this will grow in the future.

## Differentiating factors

Pet Supermarket has several key strategies that set it apart. First, its product range encompasses items for a wide array of pets with diverse needs and across various price points: "In Greece, most stores are either focused on offering very premium products, or they position themselves as discount stores. We offer products in all price categories so we can cater to all consumers, regardless of their budget."

The stores themselves are strategically located in premium areas, accessible by main roads and equipped with ample parking to enhance convenience. Customers are welcomed by a team who are passionate and knowledgeable about pets.

## Seizing opportunities and facing challenges

Pet Supermarket's ambitious goal is to reach 100 stores in the coming years – a commitment not just to growth but also to enhancing and promoting pet care and ownership across Greece.

As the company scales up, maintaining the high level of expertise that customers have come to expect poses a challenge. And it recognizes the importance of a knowledgeable sales team in delivering the value and service that set it apart in the market. So a comprehensive training program is essential to quickly elevate new hires to the company's standards.

Investment in its loyalty program also reflects a strategic effort to deepen customer relationships and encourage repeat business, an important consideration given the limited growth in online sales.

## Product selection

Greek consumers are increasingly choosing specialized food, accessories and products that create a higher level of 'quality time' with their pets. So innovative products – e.g. fresh water drinking fountains, interactive toys and massive cat trees – are seeing a surge in consumer spending. Pet Supermarket offers an extensive range of private label products in all categories.

"We'll continue to invest in expanding our private label offerings," notes Kapisir, adding, "Simultaneously, to ensure our customers have access to the widest and most appealing product selection, we collaborate with established brands and seek new supplier partnerships to maintain top quality."

## Looking forward

As the pet industry continues to evolve, driven by changing consumer preferences and technological advancements, this retailer's journey offers valuable insights into the dynamics of retail adaptation and customer engagement. With its approach to expansion, product diversity and customer service, the company is well-positioned to navigate the challenges and opportunities that lie ahead.

Pet Supermarket's story is one of strategic growth and a deep-seated commitment to serving the needs of pets and their owners in Greece. As the company continues to expand its footprint, its focus on quality, variety and accessibility will be critical in shaping the future of pet retail in the region. ♦





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