



# PETS International

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OCT 2024

**TRENDS REPORT**

## PET TREATS FACING A CRUNCH?

Tracking the ups and downs  
of the snacks & treats market

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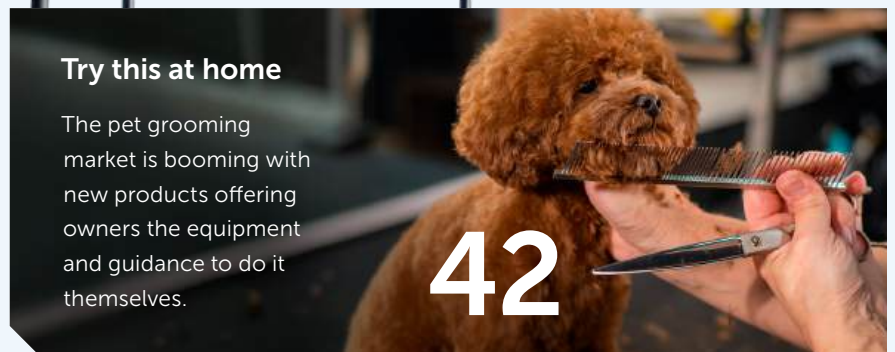
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# Consumer confidence

As we enter the last, and perhaps most challenging, quarter of the year for the pet business, I believe it is a good time to reflect on consumer perceptions of the current financial environment.

The latest data from the US indicates a downbeat outlook. In September, consumer confidence dropped by 6.9 points, marking the largest monthly decline since August 2021, during the most critical period of the COVID pandemic.

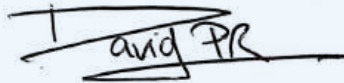
Some pet industry players – especially retailers – are feeling the impact of this consumer sentiment. While many pet parents are maintaining their spending levels, it is already a persistent trend that others are deciding to trade down.

A case in point is Pets at Home in the UK, which reported a 4.3% decline in accessories sales in one of its latest earnings releases. Snacks and treats are also experiencing some challenges. In this issue, we offer

a comprehensive overview of how shifting consumer behavior is affecting this category across both Europe and the US.

However, as always and despite the headwinds, the pet industry continues to innovate. The boom of the insect ingredient industry and, more recently, the legislative path for the use of cultivated meat in pet food are developments to be watched. How will the interest of pet parents in these innovative ingredients develop in the foreseeable future?

Wishing you a thoughtful and inspiring reading experience.



David Palacios Rubio  
Editor-in-Chief



“The secret of business is to know something that nobody else knows.”

ARISTOTLE ONASSIS, SHIPPING MAGNATE

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### Data reveals pet food price fluctuations across US states

According to American market intelligence firm Datasembly's Grocery Price Index, pet food prices have risen by an average of 18.1% over the past 5 years across the US.

Vermont saw the steepest hike at 44.3%, followed by other states including Louisiana (42.9%), Wyoming (42.7%), Mississippi (42.5%) and Arkansas (42.4%).

While overall pet food costs have decreased by 0.4% since August 2023, according to the CPI, state-specific data shows a wide range of fluctuations. South Carolina recorded the highest inflation over the past 12 months at 3.4%, followed by Vermont (2.9%), New Mexico (2.6%), North Carolina (2.5%) and Hawaii (1.6%).

### Chewy keeps pace with growth targets for coming year

Investment firm Morgan Stanley forecasts that US online pet supplies business Chewy will hit EBITDA (earnings before interest, taxes, depreciation and amortization) of \$750 million (€673.6M) to \$800 million (€763.5M) in fiscal year (FY) 2025. Its analysis anticipates a 6.1% earnings growth for FY2025, compared with 5.5% in FY2024.

This is supported by the company's efforts to expand its growth through initiatives such as sponsored ads and automation upgrades in its distribution centers, which are running at 75% capacity.

Although revenue growth is expected to be modest at around 4.7% in FY2025, Morgan Stanley notes that Chewy is still seen as a leader in the US pet market. The pet retailer's income per active customer is also forecast to rise from \$554 (€496.78) to \$586.50 (€525.92), aided by the company's expanding product offerings in areas such as pharmacy, private label products and pet health services.





### Maxi Zoo launches teleconsulting service in France

The French pet chain's new veterinary clinic resource offers a wide range of dog, cat, small animal and bird health services, as well as specialized advice for puppies, kittens and senior pets.

This launch aims to meet the increasing demand from pet owners seeking flexible, accessible care outside of emergencies.

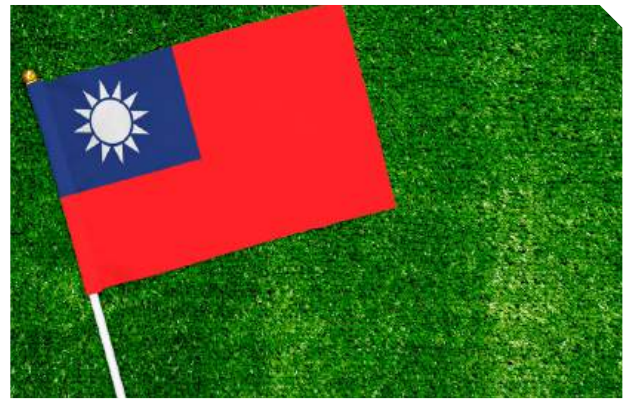
The company states that its launch in France builds on the success of Maxi Zoo's nutritional and behavioral video consultations platform, which has already proven successful in Germany. The retailer is promoting the new service at its physical stores and staff will be trained to assist customers with digital consultations.

### Taiwan's pet food industry nears \$1 billion mark

The latest data from the Taiwan Institute of Economic Research (TIER) reveals that the country's pet food industry is currently worth NT\$30.8 billion (\$965.2M/€869M).

Pet food supplements are believed to contribute NT\$5.1 billion (\$159.8M/€144M), making it a category that is growing faster than general pet food.

Data shows that pet parents allocate half of their pet-related spending to food. This figure was estimated to be around 41% earlier in the year.



### Pet parents increasingly influenced by social media

An upward trend shows more and more US pet parents are turning to social media for information about their pets.

According to the American Pet Products Association (APPA) 2024 Dog & Cat Report, cat owners primarily rely on the internet and social media for advice, followed by veterinarians.

Approximately 49% of cat owners now seek information online, up from 42% in 2018, while more than 4 out of 10 (43%) consult veterinarians.

Dog owners, however, prefer veterinarians first, with 51% seeking their guidance, followed by 43% turning to social media. This marks a significant rise from 2018 when only 35% of dog owners used social media for pet care insights.

Protexin, a US-based supplement manufacturer, uncovered that most conversations between dog owners happen on X (formerly Twitter) and Reddit. According to its recent research, discussions about "dog walks" and "diet" accounted for 55% and 37% of mentions, respectively, from May 2023 to May 2024.

Dog walking discussions often focus on the best places to go and how frequently dogs should be walked. Diet and nutrition also emerged as key topics, with nearly 2 million mentions.

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## Hong Kong government hosts e-commerce shopping festival

The Hong Kong Shopping Festival, which took place in August, aimed to boost online sales for small and medium enterprises (SMEs) and strengthen local brands' presence in Mainland China, the world's largest e-commerce market.

Organized by the Hong Kong Trade Development Council (HKTDC), the event showcased over 230 brands in categories including clothing, cosmetics, household goods, food, digital products, health and pet care.

"Establishing a presence in China, the world's largest e-commerce market, is crucial for sustaining business growth and development," a HKTDC spokesperson tells PETS International.

Official figures show that online sales in Hong Kong grew by nearly 60% between 2020 and 2023, reaching \$4.2 billion (€3.8B).



## Survey suggests pets inspire financial responsibility

Financial services provider Empower asked 1,000 pet owners in the US about their spending patterns. Most of them spent an average of \$1,355 (€1,264) on their pets in 2023, with nearly 1 in 5 (19%) planning to spend more this year.

A third of respondents said they buy more items for their companion animals than themselves. Over 4 out of 10 (42%) respondents admitted that the more money they make, the more they spend on their pets.

Around two-fifths of respondents, or 39%, said their furry friends inspired them to be more financially responsible.

## Pet Valu opens second-largest pet distribution center in Canada

The 350,000 sq ft center in Surrey – a city in the province of British Columbia – is the company's second-largest supply hub for pet products in Canada. It will support 130 stores across the western provinces, offering Pet Valu 3 times the capacity of its existing warehouse in Vancouver.

"This is a key element that will enable us to continue to grow our store network in western Canada and better serve our existing stores without relying on more expensive, third-party storage alternatives," Chief Supply Chain Officer Nico Weidel tells PETS International.

Pet Valu plans to automate its piece-pick operations – the process of selecting individual items from the warehouse to fulfill customer orders – starting in 2026.



### Zooplus refreshes logo

The Munich-based pet e-commerce player has updated its brand identity with a new logo. The new design aims to maintain the “compelling, playful shapes and distinctive eyes” of the original 25-year-old logo, while offering a modern and engaging look.

The development has been termed a “strategic evolution” and is part of a broader strategy to strengthen Zooplus’s position as the pet supply sector’s digital market leader.

The move also aims to reinforce and enhance the firm’s value proposition to its growing European customer base.

“We have retained what makes us unique while introducing improvements that reflect our growth and future vision,” says Jonas Schultheiss, Chief Marketing Officer at Zooplus.

The rebranding also includes a comprehensive update to the user interface (UI) and user experience (UX) across the website, app and other digital touchpoints.

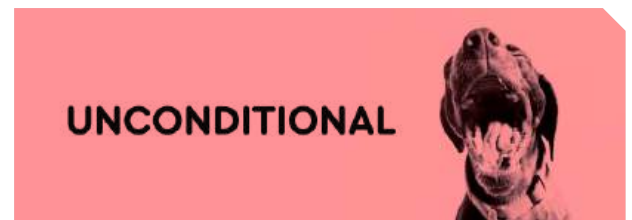


### Eastern European pet player marks golden jubilee

Croatian pet company Unconditional (formerly known as Zoo Hobby) celebrated 50 years in the business in the summer.

Since its launch by Vatroslav Varda in 1974 as one of the first specialized pet stores in the country, the company has grown into a market leader, with 50 Zoocity stores in Croatia and a business supplying veterinary clinics and pet shops across Croatia, Serbia and Slovenia. The company, which employs nearly 450 people, has now been led by the founder’s son Edvard Varda for 25 years.

In the past 8 years, Unconditional has quadrupled in revenue and employee numbers. Its goal is to end 2024 with a revenue of €50 million (\$55M), with the aim of hitting €100 million (\$110M) by 2028. In 2022 the company concluded a joint-venture agreement with the German Fressnapf Group, providing it with resources for further growth.



### Green-lipped mussel production initiative tipped to benefit New Zealand pet food industry

A \$64.3 million (€58.2M) venture backed by the New Zealand government is expected to boost the supply of greenshell (green-lipped) mussel, a key ingredient that supports canine joint health.

While the project’s primary goal is not to focus on commercial applications in pet health supplements or food products, the Marine Farming Association – the organization leading the project – acknowledges potential benefits for the pet industry.

“The project aims to address the industry-wide problem of low retention of greenshell mussel spat (juveniles) on mussel farms, rather than exploring specific commercial applications for the mussels, such as pet health supplements and food products,” Steve Penno, Director Investment Programmes at Ministry for Primary Industries (MPI), tells PETS International.

Greenshell mussels are the country’s most valuable aquaculture species, generating approximately NZ\$336 million (\$207.8M/€187.3M) annually in export revenue.

Green-lipped mussel extract is recognized for its effectiveness in supporting joint health in dogs, alongside other benefits. Recently, global player Mars Petcare exported this ingredient to Australia for a new line of functional pet food.



DATA INSIGHT

**52.1%**  
of pet owners in the US have increased their expenditure on pet food and treats in the past 3 months

This marks a significant increase from 36% during the same period in 2023, according to a new survey by investment bank RBC Capital Markets.



NEW APPOINTMENTS

**Central Garden & Pet**

Current Chief Financial Officer (CFO) Niko Lahanas has been promoted to Chief Executive Officer (CEO) at the Californian company. Brad Smith will replace him as CFO.

**PetSmart**

The US pet store chain has appointed Alan Schnaid, Executive Vice President and CFO since 2017, as interim President and CEO after the departure of J.K. Symancyk.

**Mars Petcare**

The pet food multinational has appointed Gabriel Millan as its CFO, effective December. He will oversee Mars Petcare's \$30 billion+ (€27.2B+) pet health, services and nutrition business.

**1**

**General Mills** paid \$436 million (€389.5M) to acquire Belgian player **Edgar & Cooper** according to media reports. The transaction was announced in May.

TOP 3 INVESTMENTS

**2**

**Nestlé** announced a £150 million (\$200.5M/€180M) investment in its Purina pet care facility located in Wisbech, in the east of England. The plant has an annual production capacity of 1.2 billion pet meals.

**3**

Florida-headquartered firm **Better Choice** acquired Canadian specialty pharmacy SRx Health Solutions for \$125 million (€113M). The company operates 35 specialty pharmacy locations and 40 health clinics across Canada.



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**Customer losses in pet retailers fuel Amazon's growth in online pet retail**

New data shows that almost 90% of pet owners shop online, with a quarter of offline shoppers planning to switch. US online pet business Chewy lost 7.2% of customers as of July 2024, mainly due to price and delivery issues. Amazon, Walmart and Petco gained the most from Chewy's customer losses.

LATEST NEWS 

# Tracking the ups and downs of the snacks and treats market

While sales in European countries show generally positive growth figures, there is a slight downward trend in the US.



**Andrea Deitert**  
Global Insight Lead Pet Care & Food  
NielsenIQ

Since 2020, the global snacks and treats market for dogs and cats has seen robust growth, often achieving year-over-year increases in double digits. But recent developments indicate a significant slowdown, with growth in 2023 dipping to just 1.7%.

## Challenges for global growth

The downturn in the global market can largely be attributed to the US, where sales in the category have contracted by 0.7%. North America is still the largest player in the snacks and treats market globally, with 65% of total market value. That significant share means even small shifts in market dynamics have an outsized impact on global trends.

US influence has therefore diminished over the past 2 years, as it has lost 2 percentage points of its market share to Europe. Europe now holds 22% of the global market, underscoring its strengthening position. The region has captured 45% of total units sold in the pet treats category, while the US represents 36% of worldwide sales.

Europe continues to exhibit positive growth trends, with the region expanding by 6.7% in 2023. Germany has emerged as a key driver of this, contributing

significantly to overall European performance.

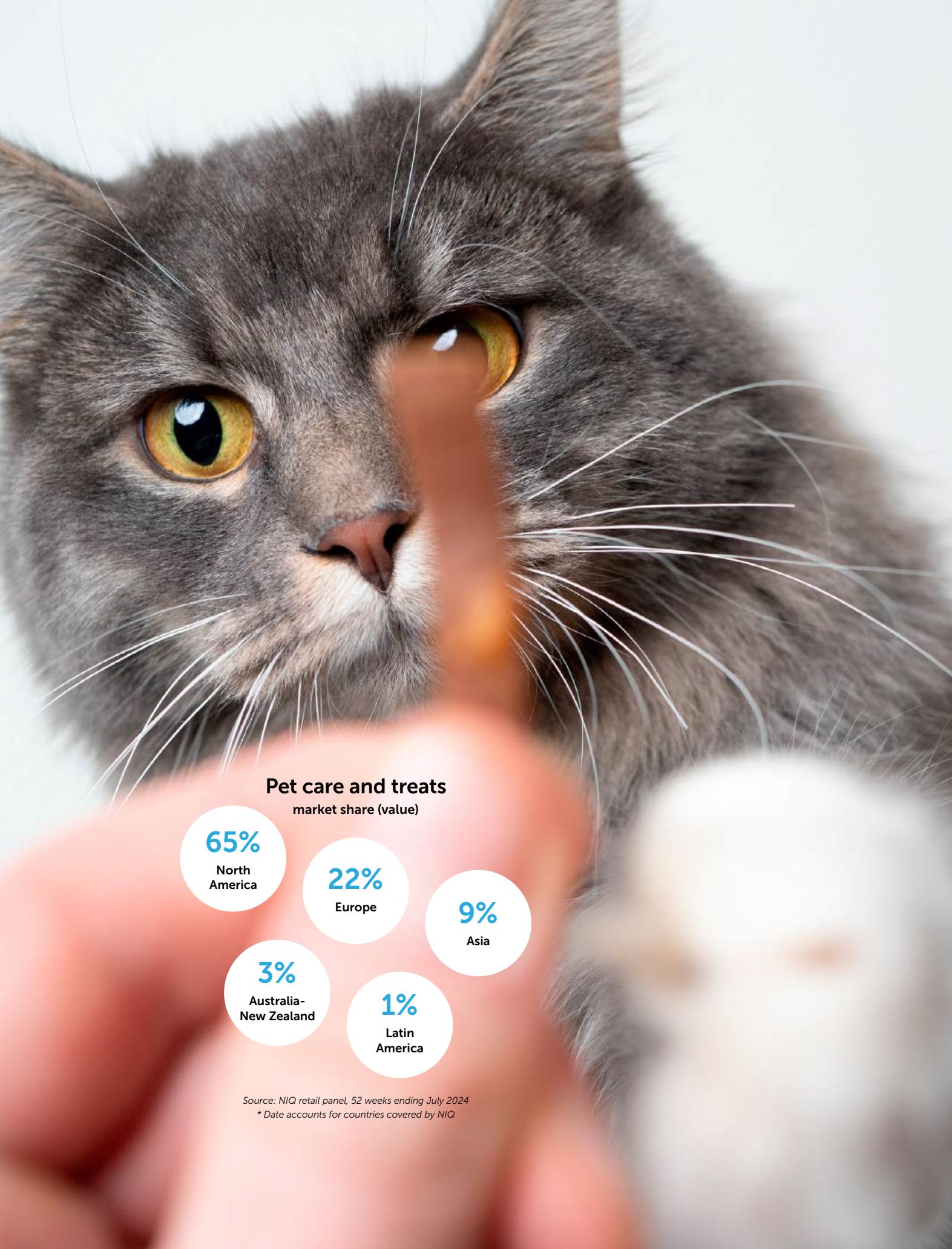
But while Europe remains a bright spot in the global market, its growth has begun to decelerate – from 12% a year ago. This slowdown reflects broader economic challenges, including inflation, which have reshaped purchasing behavior as consumers become more selective in their spending.

## Shifts in purchasing patterns

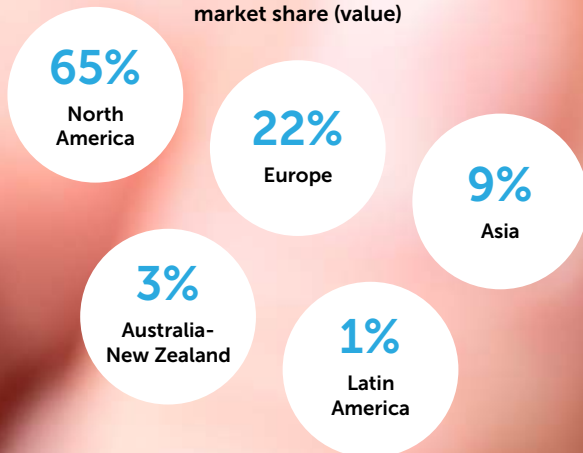
Differing trends in the US and Europe reflect the evolving dynamics of the snacks and treats market. Europe has emerged as the key contributor to global growth, benefiting from both price increases and steady sales volumes. The US, while encountering some challenges with a slight decline in volume, continues to play a significant role in the market. This suggests that the region is adapting to the consumer behavior shifts influencing its current performance.

In Europe, treat products account for 18% of the total pet food portfolio. Despite the larger size of the cat main meal segment, dog treats hold 61% of the market compared to the 39% for cats. However, cat owners are beginning to close the gap, with category sales growing at a rate of 13.3% (compared to 4% for dogs).

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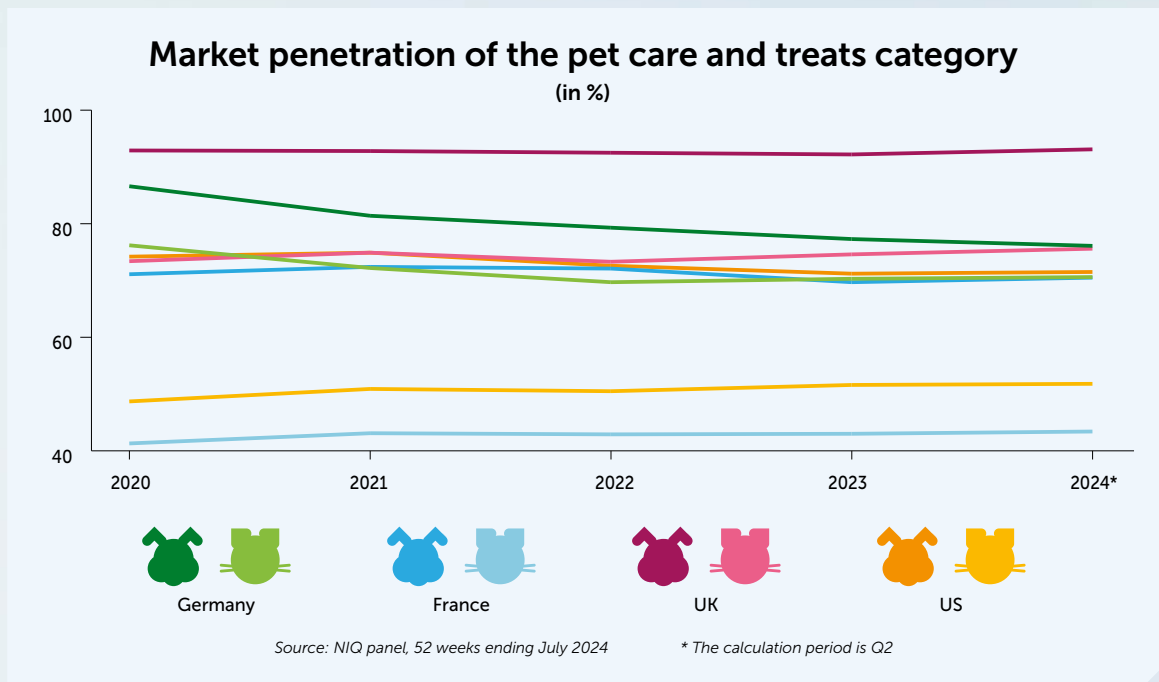


**Pet care and treats**  
market share (value)



Source: NIQ retail panel, 52 weeks ending July 2024

\* Data accounts for countries covered by NIQ



### Consumer behavior in Europe

Countries within Europe exhibit varying trends in snacks and treats consumption. France and the UK have both seen increases in their long-term consumer bases, indicating steady demand. On the contrary, Germany has experienced a decline in consumer interest, partly due to a shift in purchasing behavior during the COVID-19 pandemic, with many German pet owners now preferring online purchases to traditional retail buying.

Looking at specific spending habits, cat owners in the UK, France and Germany typically spend 30% less on treats per trip when compared with dog owners. UK cat owners spend the most (€3.66/\$4.07), followed by France (€3.50/\$3.89) and Germany (€3.24/\$3.60). UK consumers also tend to be more interested in snacks and treats in general, purchasing these products more frequently than their counterparts in other countries.

Dog owners not only spend more per trip than cat owners, but they also purchase the products more frequently. French owners spend an average of €5.02 (\$5.58) on treats per trip, more than consumers in Germany (€4.48/\$4.98) and the UK (€4.38/\$4.87). Looking at frequency, pet owners in the UK buy dog

snacks and treats more often (15.3 times per year on average), followed by consumers in Germany (14.4) and France (9.1).

### A market with opportunities

What indications do current trends give us for the future of the market? Europe is increasingly the driving force behind global market growth in snacks and treats for dogs and cats, supported by smaller contributions from Asia Pacific. Over the past 2 years, European spending has increased, largely as a result of inflation, although growth has stabilized recently as consumers adjust to higher prices and become more cautious in their spending.

While the US faces challenges with declining sales, inflation has impacted the market across the board, leading to changes in purchasing habits and slowing growth. However, with Europe continuing to post positive trends, and cat owners increasingly embracing pet treat products, the market still shows promise for future expansion. ♦

***Cat owners in the UK, France and Germany typically spend 30% less on treats per trip when compared with dog owners.***

# Snack attack: the impacts of calories in treats

Snacking products represent the fastest-growing segment in the pet food market – but do they come at a cost to pet health?



**Julia Klischies**  
Contributor  
PETS International

As a reward for training, something to provide distraction, a token of affection or a between-meal treat, snacks have become indispensable additions to product ranges for dogs and cats, and come in various forms, sizes and compositions.

## A booming market

Currently, the European pet snacks and treats market size is valued at \$7.6 billion (€6.8B) and is expected to grow annually by 11.3% until 2030.

Unlike with their pets' main diet, where pet owners tend to be brand-loyal, there is a strong consumer readiness to explore the entire range of snacks. For chewing articles for dogs, owners frequently switch between pig ears, bully sticks, chew bones and similar long-lasting snacks.

Since training should always be exciting and rewards appealing, countless types of handy treats are available. A token of affection should be something special

– and varied. Clever marketing strategies are used to help products stand out from their competitors and make pet owners feel good.

Superficially, many snacks suggest that they are healthy and even that they provide extra benefits for the beloved pet: good for skin and coat, providing extra vitamins and being high in protein are just a few examples of the colorful claims found on snack packaging. Not only do they seem like guilt-free treats, but it also feels like they could be contributing to a pet's health.

However, a closer look at the packaging often reveals that the ingredients touted for their benefits are only present in minimal amounts, such as would require a pet to consume exorbitant quantities of the snacks to achieve the marketed effect. And from a nutritionist's point of view, snacks are one thing above all: an extra portion of calories.

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***More details should be provided to the consumer and nutrient levels of snacks should be carefully included in feeding guidelines.***



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## Caloric calculations

Conscientious pet owners will weigh snacks and reduce their pets' daily food portion accordingly. However, it is often forgotten that different feeds have varying nutrient densities – 100 g of wet food cannot simply be swapped for 100 g of dried pig ear. A typical pig ear weighs 40-50 g and contains 466 kcal per 100 g. A 10 kg dog with a normal activity level needs about 550 kcal per day, so feeding just one pig ear provides 41% of the dog's daily caloric intake.

An example premium wet food contains about 100 kcal per 100 g, meaning the same 10 kg dog would need about 550 g of this food per day. To balance out the calories from one pig ear, the wet food portion would need to be reduced by 200-230 g, not just 40-50 g (the weight of the pig ear).

And what are the consequences of more or less uncontrolled snack feeding? When snacks are given in addition to the daily food amount without reducing it, calorie intake increases. Just like in humans, there are active pets for whom a bit more energy intake doesn't matter. For others, every treat shows up on the scale.

## Health beyond calories

Snacks are considered supplementary feed (which do not constitute a complete diet on their own) or single compound feed (consisting of just one ingredient). They are not balanced or fully vitaminized complete feeds. It's often unclear what exactly is being added to the diet with a snack because few treat items have a complete analysis, as these are complex, costly and rarely invested in.

Feeding snacks while reducing the food portion is sensible regarding calorie intake but not with regard to a balanced diet: generally, snacks are not designed to be balanced. This means that reducing the amount of complete food also reduces the intake of vitamins and trace and macro elements, which are not compensated by giving a snack.

Rather, snacks upset the balance: for example, feeding a bone can significantly increase calcium intake and snack items with a high meat content increase phosphorus intake.



Other important factors should be considered.

One is the use of feed additives, which can impose intake limitations due to mandated maximum limits. For example, potassium sorbate – a common additive in semi-moist treats – now has a regulated maximum quantity and must be declared on packaging.

## Achieving balance

What can snack manufacturers do to stand out from the flood of marketing claims with honest, authentic and truly pet-appropriate statements? The answer is to develop snacks with the same care as well-thought-out complete feeds.

Of course, this means greater effort in recipe development, raw material procurement and the complexity of the necessary ingredients, but it doesn't have to be the use of a completely balanced premix with a life-stage approach. If the 'Big 5' analytical values fit the general nutritional profile of the pet and attention is paid to a balanced calcium-phosphorus ratio, a big step towards the needed extra mile is already taken.

We can also conclude that common feeding recommendations such as "feed snacks up to a maximum of 20% of the daily food ration" are not optimal. More details should be provided to the consumer and nutrient levels of snacks should be carefully included in well-calculated feeding guidelines. This approach will help pets stay healthy and avoid obesity, a significant challenge for pets today.

If manufacturers then ensure that only species-appropriate ingredients are used, the path to a healthy snack is set. Let's hope we will be able to find more balanced, healthy treats with sensible feeding recommendations in the future. Pet owners will surely appreciate them and be ready to trust these products. ♦



## Does private label pet food meet consumer expectations?

A global survey conducted by PETS International, in partnership with Yummypets, reveals useful insights into perceptions of retailers' own brands.



**Paula Flores**  
Contributor  
PETS International

Despite inflationary pressures easing in most markets recently, pet owners still feel the impact of steep price hikes in the past 2 years. Has this prompted a shift in purchasing behaviors? And how have private labels fared? A survey of consumers in the UK, US, Canada and France provides some answers.

### Retailer brand awareness

When asked about the impact of inflation on their finances, half of the respondents say it has had an effect. US consumers, in particular, have felt the pinch (62%), whereas France has the highest proportion of consumers who've felt no effect at all (12% versus the global 5%). Nevertheless, 65% of all pet owners in the survey say they haven't swapped pet food brands over the past year.

Private label products offer a more affordable alternative to established brands, but are consumers aware of that? More than half of the survey respondents say they know what private label is (54%), with French consumers the most familiar with it (86%). Yet some 2 out of 10 Canadian pet parents don't know anything about retailer brands. Nor do a quarter of the UK pet owners surveyed.

Globally, 62% of the respondents say they bought private label products for food either often or very often. This was followed by household products (59%) and personal care (41%). Interestingly, the proportion of those buying retailer brands drops to 22% when it comes to pet products.

### Frequent purchases

More than 4 out of 10 (44%) survey respondents say they are buying private label pet products more often now than last year, with US consumers the most

likely to do so (52%). The most frequently purchased products are treats (41%) and toys (34%).

When it comes to food, dry beats wet (29% vs 24%). Out of the 4 markets, UK pet owners are the most likely to buy a retailer brand of dry food (39%), with a similar proportion purchasing wet (37%). Private label cat litter is the most popular among French consumers (35% vs the global 26%), while UK pet owners are significantly more likely to buy own brand medication (14% vs 8%).

### Criteria for choosing a product

Health benefits (52%), ingredients (51%) and price (48%) are the top 3 criteria for consumers when making a purchasing decision regarding a private label product for their pet. However, there are some interesting differences when we look at owners in different countries.

French pet parents are more likely to choose private labels based on nutritional goodness (47%) and segmentation by age or breed (45%), whereas consumers in the US pay more attention to the brand. Canadian owners are more likely to favor a reduced list of ingredients (28%), as well as recommendations from peers (26%), than any of the other markets.

**65% of all pet owners in the survey say they haven't swapped pet food brands over the past year.**

### The appeal of affordability

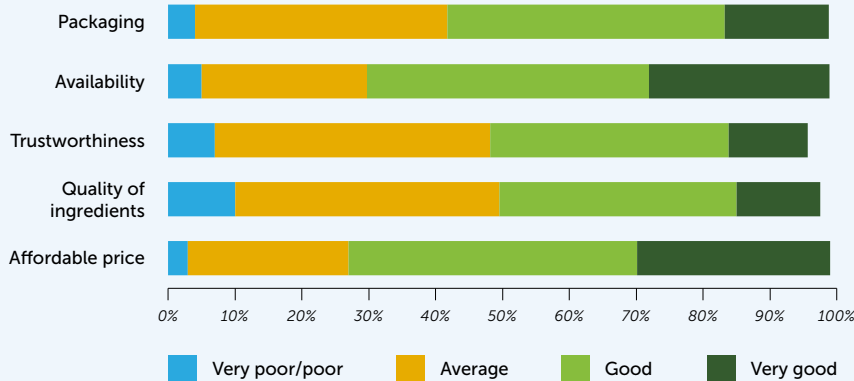
Affordability is, not surprisingly, one of the biggest advantages of buying private label pet food – 74% of the survey respondents agree with this. The fact that retailer brands are cheaper than established brands is the main driver for purchasing private label products (44%). A quarter of the respondents say that regular sales promotions for these products motivate them to buy.

A combined 72% of the respondents rate private label pet foods as either “good” (43%) or “very good” (29%) in terms of affordability, reflecting a clear consensus that these products offer value for money. While price is a significant purchase driver, it’s not the only one: 23% of pet parents surveyed highlight their trust in a chosen retailer, suggesting that retail brand equity plays a role in their decision-making process.

Besides these cost savings, some pet owners (11%) appreciate the ease of finding the products they need on store shelves, as well as the quality of the ingredients (9%). Just 4% of respondents indicate the trustworthiness of claims as a benefit.

▶ SEE NEXT PAGE

### Pet food private label rating



Source: Yummypets-PETS International, August 2024 (n= 1431) in US, Canada, UK and France



### Big vs small store shoppers

From another perspective, pet owners who shop at hypermarkets and supermarkets are more likely to mention price as key for choosing pet food (58%) compared to those who shop in different channels. Other criteria for bigger store shoppers are that food is palatable for their pet (45%) and food packaging (22%).

By contrast, the consumers who favor pet shops are more likely to choose food products based on criteria such as non-meat protein sources (71%), country of origin or organically produced (67%) and fresh meat or other natural claims (65%).

### Quality and transparency

The survey results show a growing acceptance of private label products as comparable alternatives, with 44% of pet parents agreeing that retailer brand pet foods are of the same quality as established brands. More than half of the UK respondents (55%) support this claim.

When it comes to disadvantages, the most common concern mentioned is lower quality. Almost half of the respondents (48%) state this as their primary concern, although just under a quarter (23%) actually believe that retailer brands are of lesser quality than branded pet food.

Another challenge is the limited variety of options available, noted by 22% of the respondents. Some pet owners (16%) also highlight a lack of trust as a

disadvantage. This may reflect some lingering concern about the transparency and reliability of the claims made by private labels.

### Good but can do better

The overall sentiment toward private label pet foods is relatively neutral to quite positive. The largest proportion of survey respondents rate these brands as "average" (39%) or "good" (28%). A smaller proportion (10%) consider them to be even "very good".

Yet nearly a quarter (23%) of respondents rate their opinion of private label pet food as "poor" (5%) or "very poor" (23%). This is particularly significant among French consumers, who rate these kind of products as the lowest of all 4 markets, with 3 out of 10 pet owners in the country rating private label pet food as poor.

Retailer pet food brands offer substantial appeal in terms of price, but there are still some obstacles when it comes to quality perception, variety and trust. So retailers looking to grow their share of the pet food market will need to address these concerns by increasing the transparency in their marketing claims and improving ingredient quality.

By building on their affordability appeal, as well as on today's growing trust in retailers, private label pet foods are certainly well placed to increase their market share if they can manage to bridge the gap between value and perceived quality. ♦

## Pet parents who swapped brands over the past year due to prices



Source: Yummypets-PETS International, August 2024 (n= 1431) in US, UK, Canada and France

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Right from the start, Nutriliq's mission was to assist businesses with the launch of their own brands of supplements and cosmetics. Over the years, the company has evolved into a trusted partner for both standard and custom formulas designed for pets and agricultural animals.

By always working in close collaboration with its clients, Nutriliq ensures that every product is a highly personalized solution tailored to meet specific needs and requirements.

## Core values and certifications

Nutriliq is dedicated to maintaining high levels of customer satisfaction, fostering open communication and focusing intensively on research and development.

The company now holds FCA certification for its liquids, powders and pastes, and its functional snack production is GMP+ certified. Additionally, its cosmetics are certified under the Cosmos-standard, which ensures they adhere to stringent safety and quality regulations.

## Standard or tailored private labels

Nutriliq offers 2 main options for private label product development. Companies can choose a custom-made formula tailored to their specific needs, or opt for standard formulas that can be brought to market more quickly.

Its extensive product range includes liquids, powders, pastes and functional soft chews for supplements, as well as shampoos, conditioners and other animal care products.

## The launch process

The launch process at Nutriliq begins with a consultation to identify the client's requirements. After developing the product formulation, the next steps include selecting packaging and addressing legal labeling requirements.

Once the product is finalized and approved, production starts and the finished goods are either delivered or made available for client pick-up.

## Toward a more sustainable future

Looking to the future, Nutriliq aims to enhance its position as a leading global player in the private label sector for supplements and cosmetics for both pets and production animals.

The company is committed to helping its clients achieve both their commercial and environmental goals. So sustainability remains a key focus, such as ongoing initiatives regarding the use of 100% renewable energy and reducing the environmental impact of packaging. ♦

**Nutriliq**  
*nutriliq.eu*



# Beyond the bowl: table scraps and canine nutrition

Supplementing a complete pet diet with various 'extras' – whether homemade or shop-bought – is common, but the practice can be nutritionally detrimental.



**Alexandra Wesker**  
Contributor  
PETS International

Most of Europe's 106 million pet dogs subsist on commercial dry dog foods, with the addition of significant amounts of snacks, wet food and homemade food. In emerging markets outside of Europe food scraps play a larger role, especially for dog owners of a lower socio-economic status.

## Commercially produced pet diets

Commercial pet food was developed a century ago and started with canned food. Before then, dogs and cats were fed largely on table scraps and what they might find or catch for themselves. Commercial diets have been successful in part due to their convenience for the end-consumer and their cost efficiency.

Owners feed their dogs mostly on dry food, followed by a mixture of dry and wet, and then wet food. There are various factors that make dry food so popular. Feeding extruded dry food is convenient, and if a kibble falls aside, it is easily put back. Wet food is messier.

Wet food also has a stronger smell that is not to every pet owner's liking. An unfinished tin of dog food expires quickly and is stored in the refrigerator next to human food products – also not what all owners want to see.

The volume of wet food is larger due to the high inclusion of water, resulting in larger portions plus a higher price per meal.

A major benefit of modern pet foods is the opportunity to have nutritionists formulate diets with ingredients considered safe for dogs alongside meeting their nutritional requirements – although pet owners don't always appreciate the true value of this perk.

Pet diets marketed as 'complete' need to prove certain nutritional standards to prevent deficiencies and excesses. Processing of commercial diets also allows for added value for by-products of the human food chain, which makes for a more sustainable use of raw materials and allows for industry development.

## Shifting dietary trends

However, pet nutrition is not that simple. Recent research from the University of Guelph, Ontario, has found that although the vast majority of pets (79% dogs, 90% cats) are fed conventional food, this diet is rarely exclusive with only 13% dogs and 32% cats fed solely on this kind of pet food.

Many pets are also offered homemade (64% dogs, 46% cats) and/or raw (66% dogs, 53% cats) foods. Feeding practices also varied with geographical location across Australia, Canada, New Zealand, the UK and the US.



Numbers of pets being fed 'alternate' foods alongside commercial diets are rising. The humanization of pets has seen owners feeding dogs on diets similar to their own, such as grain-free or vegetarian. There is also a reversing trend towards home-cooked diets.

Industrial manufacturing of pet food and processes such as extrusion impact on the product, and home-cooked diets are promoted as being healthier for the dog. Although some claims made are true, most are not. In fact, research from the University of California found the vast majority of home-cooked formulations online or in veterinary and pet care books were deficient in multiple nutrients.

### Table scraps: cause for concern?

The main health consideration around the increasing trend of home cooking is nutritional variability, and therefore the risk of the pet's overall diet not meeting all their nutritional requirements. Furthermore, the types of ingredients used are likely meant for the human food chain, as opposed to the by-products used in most commercial diets.

*The humanization of pets has seen owners feeding dogs on diets similar to their own, such as grain-free or vegetarian.*

Table scraps may contain ingredients that are safe for humans but not for dogs, such as onions or garlic. Cooking one individual meal at home uses more energy and resources to achieve the same caloric value as conventional diets, making home cooking less sustainable.

Other types of feeding such as snacks are a positive interaction and table scraps help to reduce food waste. A common recommendation for snacks is to feed no more than 10% of the daily energy intake from snacks – which would require a calculation on the part of the owner and may be overlooked.

Feeding leftovers can also result in adding excess calories on top of the dog's diet, leading to unintended weight gain. Altogether, it is safer and more sustainable for pet owners to cook the appropriate amount for their human household consumption and store leftovers for themselves more than for their dog. ♦

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# Unlocking faba's power: functional benefits for pet food

In pet food, functionality is crucial for meeting nutritional needs while ensuring the right taste, texture and consistency. Faba protein, derived from faba beans, excels in delivering these essential qualities.



**Katarzyna Świrkowicz**  
*Pet Business Development Manager*  
 Livalta  
 livalta.com

Nutritionally, faba protein is a high-quality option, offering over 60% protein content and a well-balanced profile of essential amino acids that are readily available. Faba protein excels functionally too. It is highly soluble, and it binds, emulsifies and gels.

## High-performance plant-based protein

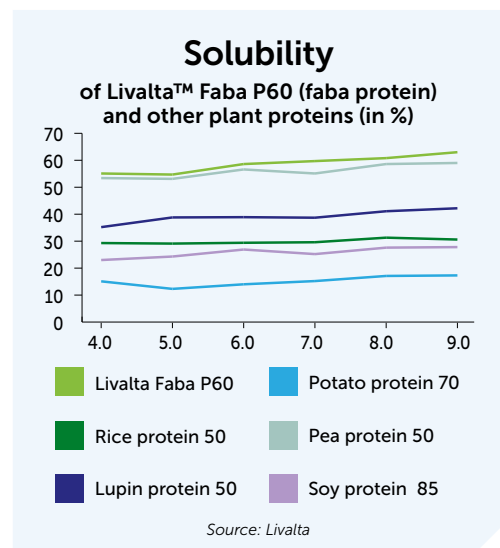
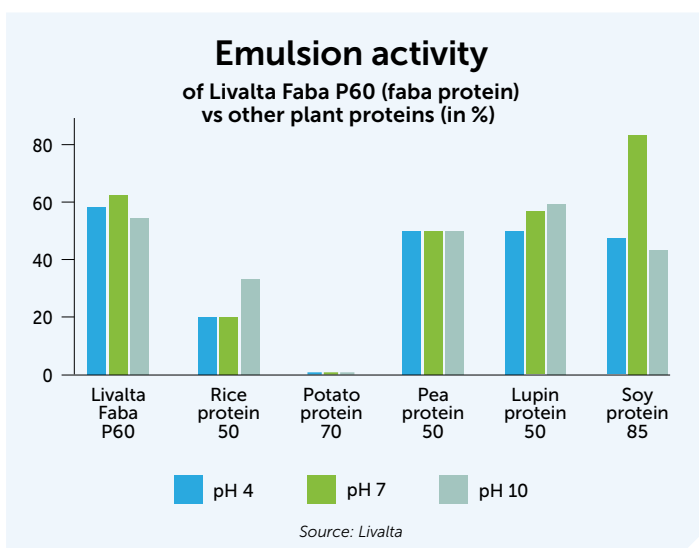
These attributes are most relevant in wet pet food, where they contribute to creating a homogeneous

product with consistent texture, taste and feel, preventing the product from falling apart and improving its shelf life.

Livalta's tests demonstrate how effectively faba protein performs in comparison with other plant-based proteins (see *Solubility graph below*).

## The power of faba: proven functionality

Livalta understands the challenges and opportunities associated with plant-based proteins. Livalta Faba P60 not only delivers proven functionality, but also aligns with the company's standards for nutrition and sustainability. ♦





# The era of cultivated meat pet food gets a step closer

**Recent advances worldwide have put lab-grown meat on an accelerated pathway to market for use in pet food – but there are still challenges to be addressed.**



**Anay Mridul**  
Contributor  
*PETS International*

A single week in mid-July encapsulated the startling pace of regulatory progress made by the cultivated pet food sector, with several companies around the world making exciting announcements. However, industry insiders still exercise caution about how cultivated meat and other ingredients will affect the sector.

## **A first for the UK**

In a few months' time, people in the UK will be able to buy meat for their dogs made from cultivated chicken cells. This is thanks to Meatly, a London-based start-up

that became the first company to receive approval for cultivated meat in Europe, after the UK's Food Standards Agency (FSA) gave the go-ahead in early July.

## **A fast-developing story**

Meatly's announcement came during an extraordinary week for cultivated pet food. One day later, California's Friends & Family Pet Food Company partnered with Singaporean cultivated seafood company Umami Bioworks to make cat treats. And the next day, Further Foods – a subsidiary of Canadian cellular agriculture investor CULT Food Science – said it planned to begin dog feeding trials in its hunt for regulatory approval for cultivated chicken under the Noochies! brand.

The approval for Meatly was the result of an 18-month-long process, featuring assessments and site visits from the FSA, the Department for Environment, Food and Rural Affairs (DEFRA) and the Animal and Plant Health Agency (APHA).

To get to this point, the start-up registered as a feed business operator, while conducting extensive testing to prepare a comprehensive dossier proving that cultivated chicken is safe and healthy for pets, and contains no antibiotics, harmful pathogens, heavy metals or GMOs.

### Cutting costs to market

Now, Meatly – whose chicken is suitable for both dogs and cats – is ramping up production to supply pet food manufacturers, who will combine its cultivated meat with plant-based ingredients. The company has lowered the cost of its culture media – a nutrient mix that promotes the growth of animal cells – from hundreds of pounds to just £1 (€1.19/\$1.32) per liter.

This is a major breakthrough, since this accounts for the main cost of cultivated meat. Even so, just as most meat-based pet food also contains other ingredients, the cost of producing it is still too prohibitive for the end product to be made of 100% cultivated meat.

Austrian-American start-up BioCraft Pet Nutrition, which is making cultivated mouse meat, similarly cut the price of its growth media, with the end product now priced at between \$2 (€1.80) and \$2.50 (€2.25). The Noochies! products will be priced on a par with conventional premium dog treats (freeze-dried or raw).

### Accelerated path

These advances will likely accelerate cultivated pet food's route to market, which is already quicker than the path for human-focused start-ups, according to international non-profit and think tank the Good Food Institute (GFI) Europe. They will also breed new players, like Friends & Family.

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*Creating Petfood*

Its CEO Joshua Errett says he started the company after identifying two trends: “One, cultivated meat companies need to get to market. And two, there were no [consumer-facing] cultivated meat pet brands.”

“I’m building an innovation studio for cultivated meats, creating product lines to showcase a variety of cultivated ingredients. Right now, that’s a very unique model. But I think very soon it will be the standard and you’ll see lots of other cultivated brands following this idea,” he adds.

### Is it safe and healthy?

Errett is also a former VP at CULT Food Science, which had acquired his brand Noochies!. In August, the company submitted its trial design to the US Food and Drug Administration (FDA). This is part of an approval process that also regulates feed ingredients and is overseen by the FDA’s Center for Veterinary Medicine (CVM).

“Since these are new ingredients or ingredients being produced using new methods, the FDA wants to know that they perform the same as conventionally produced meat. In other words, is it safe and healthy to feed animals products containing cultivated meat?” explains Mitchell Scott, CEO of CULT Food Science.

### Preparing for launch

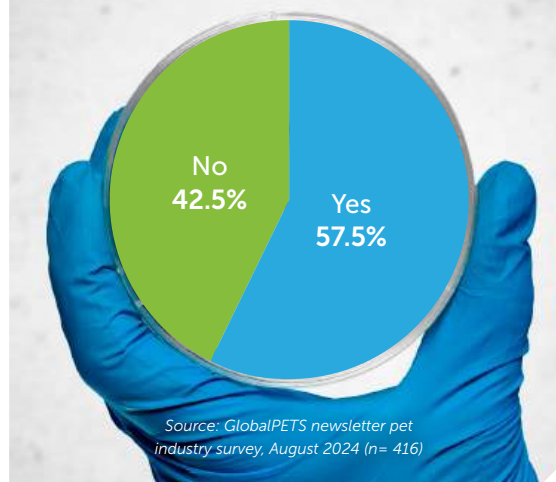
The CVM works with the Association of American Feed Control Officials (AAFCO), an independent non-profit that sets standards for novel pet ingredients. Once the FDA approves the trial protocol (within 45 days), Further Foods will begin tests on 30 healthy, adult dogs for 26 weeks.

“My understanding is that we submit the results of the feeding trials, and then there may be some further back and forth before we are approved to sell,” reveals Scott. The aim is to launch cultivated treats under the Noochies! brand in early 2025. Meanwhile, Friends & Family is also gunning for regulatory approval in the US and targeting 2025 for an initial limited launch.

### Beware of boom and bust

Errett calls Meatly’s approval a “huge step”, but when it comes to how it will affect the sector at large, he exercises caution. “There’s lots of ebb and flow in the

## Do you believe in the future of cultivated meat for pet food and treats?



industry,” he says. Having also co-founded BioCraft Pet Nutrition, he has been in the cultivated pet food space since 2016.

“My company at the time was the first and only company in the world doing cultivated meat pet food. I’ve seen boom-and-bust cycles in that short time, lots of players vying to be first-movers, lots of investment, and then lots of companies and investors pulling out of the space too,” he explains.

### Regulatory approval is just the first step

“The same is true now as it was then: the sector will only succeed if you have people who genuinely care about companion animals, who are committed to the pet food category and who are willing to do the steps to make it viable in the long term. So regulatory approval is a great step, but it’s the first of many to come,” he cautions.

Scott thinks Meatly’s greenlight is positive either way. “It means that people are paying attention to the industry and that some players out there feel threatened by it. The more awareness we can bring – even if it’s polarizing – to this new method of food production, the better,” he says.

### Political obstacles

Two challenges loom large: politics and money. Italy has banned cultivated meat, as have the US states of Florida and Alabama. A spate of other states and EU countries, including Hungary, are mulling similar measures.

A recent GFI Europe survey of over 16,000 Europeans found that over half of respondents in 13 nations supported the approval of cultivated meat, if regulators find it safe and nutritious.

"A majority of respondents agreed with this approach in Italy and Hungary, despite their governments moving to ban cultivated meat," says Seth Roberts, Senior Policy Manager at the think tank. "This suggests many people are more interested in consumer choice than in ideological debates."

### Investment tide turning

Meanwhile, investors have seemed to be deserting the entire food tech sector in the last couple of years and cultivated meat is no exception. According to GFI Europe research, investment in cultivated meat dipped by 75% in 2023. But the declining tide may be stemmed this year; the first half of 2024 attracted 57% of the \$226 million (€203M) this sector raised in all of 2023.

"Investors will look at a range of factors including regulatory pathways," says Roberts. "So, we're hopeful that news about Gourmey's application to regulators [French start-up Gourmey has become the first company to apply for EU market access for cultivated meat] – as well as Meatly's approval in the UK – will lead to a renewed interest in Europe's cultivated meat companies."

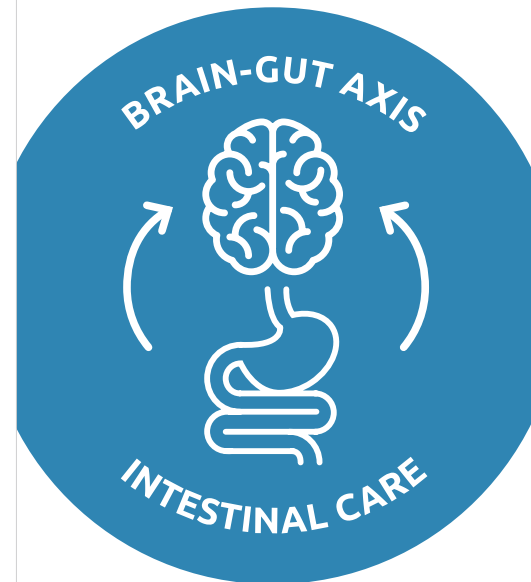
### Demonstrating demand

For cultivated pet food companies, driving investment is all about "demand, demand, demand", according to Errett. "That's why we need to get a physical product in front of customers, to show demand. It's like any other business – you need to make sure it's a viable product in the market before you make huge investments like building factories or even scaling up the inventory," he states. "I think it's difficult to justify huge investments into a product when you don't have a single customer." ♦



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# Is rice protein a suitable ingredient for cat food?



**While the use of vegetal proteins is quite well-accepted in dog food, their use in cat recipes is not as popular. Let's explore if rice protein can offer attractive opportunities for cat food producers, based on the research.**



**Dr. Maygane Ronsmans**  
Product Manager Animal Nutrition  
BENE0 GmbH  
beneo.com

Cats have higher protein and amino acid dietary requirements in comparison to dogs, for example, and are obligate carnivores. Nonetheless, several studies suggest that vegetal proteins are quite digestible for cats and can therefore play a role in cat food production.

## Benefits of vegetal proteins for cats

A study with 296 healthy short-hair domestic cats showed that the more plant protein that was included in dry cat food, the higher the protein digestibility among the cats in that sample group. The research also demonstrated that plant proteins are a satisfactory source for meeting the amino acid needs of pets, without compromising protein digestibility.

## The potential of rice protein

Research shows that 7 in 10 cat owners find protein quality and content in their cat's food important or very important. Including rice protein in a cat's food allows for an increase of protein content in the final product, while using a natural, clean-label and hypoallergenic ingredient that also offers good digestibility and has an excellent essential amino acid profile.

In a recent study, 24 healthy adult cats were given test diets with increasing amounts of rice protein

concentrate (0%, 7%, 14% and 28%) in exchange for hydrolyzed chicken liver and heart. All the diets had a similar level of total protein. The results showed that when the rice protein concentrate was increased, protein digestibility was enhanced too. In addition, there was excellent taste acceptance of the food and an improvement of feces characteristics.

## BENE0's rice protein

Rice protein is a clean-label quality ingredient, included in the EU Catalogue of Feed Materials. BENE0's ingredient offers a guaranteed protein content of a minimum 79% on a product basis and almost 90% on a dry matter basis. According to a recent internal digestibility trial in cecectomized roosters, the company's rice protein reaches (ileal) digestibility scores close to 90%, confirming its good digestibility and overall high quality.

In addition, this hypoallergenic, clean-label ingredient is free from the most frequent food allergens, making it suitable for the most sensitive cats, like seniors or kittens, as well as cats with allergies. Produced in a state-of-the-art and food-certified rice ingredient plant in Wijgmaal, Belgium, from non-GMO raw material sources, BENE0's rice protein can fulfill the most demanding and specific requirements of (super) premium or veterinary dry and wet cat food products. ♦

*BENE0 source references for this article are available on request.*



# Expanding opportunities for insect use in pet food

As findings show that consumers are increasingly open to insect ingredients, the International Platform of Insects for Food and Feed (IPIFF) is working towards making production more viable.



**Christophe Derrien**  
*Secretary General*  
IPIFF

The pet food industry is seeing a shift towards more sustainable and nutritious solutions. One promising option is the use of insects as a primary ingredient in alternative pet food products. But are consumers and legislators ready for this development?

## European consumers are open-minded

The idea of consuming insects as a regular part of the diet may seem unusual to some, but it is gaining traction across the globe. Entomophagy – the practice of eating insects – has been a part of the diets of many cultures for centuries, particularly in regions of Africa, Asia and Latin America. As global food sustainability becomes a more pressing issue, the West is beginning to embrace insects as a viable food source.

A recent IPIFF survey into consumer acceptance of edible insects gave some encouraging results. The data was collected in September to October 2023 from 3,000 respondents aged 18+, with an equal split between male and female participants, in the largest EU markets: Belgium, France, Germany, Italy, Poland and Sweden.

A third of respondents had already eaten insect-enriched products. And 6 out of 10 of these Europeans rated the taste as "very good". The key factors that drive the respondents' changes in food habits are taste, market availability, health benefits, product pricing, environmental sustainability and food origin.

Perhaps unsurprisingly, it is the younger age groups who are the most likely to try insect-based food. Sports supplements, for example, are among the most appealing insect-enriched food products, with 71% of respondents saying they would consider eating them.

▶ [SEE NEXT PAGE](#)

The survey respondents were asked their opinions of the different types of insect-based food and insect ingredients they'd tried, and this gave encouraging though differing responses. Although these findings are about insect-enriched food for human consumption, the general acceptance of insect ingredients as a sustainable and nutritious alternative is a positive sign for future purchasing intent with regard to insect-based options for pets.

### Current EU organic food regulations

Today, insect proteins are allowed for use as feed for farmed fish, poultry and pig species, as well as in food for pets, fur animals and other non-food producing animals (e.g. reptiles, birds of prey, and zoo and circus animals).

There is no positive list of insect species that are authorized for pet food. Consequently, any species that is not pathogenic to humans or animals may be used in nutrition, provided there is compliance with EU feed legislation (e.g. approval of the production facility), as well as the hygiene and processing requirements laid down in EU animal by-products legislation<sup>1</sup>.

On 28 November 2022, the European Commission (EC) adopted a legislative proposal aimed at providing legal certainty for pet food producers, while giving guidance on how to use the EU organic production logo. On 18 October 2023, the European Parliament and the Council of the European Union adopted a regulation<sup>2</sup> establishing a new regulatory framework defining the conditions under which organically produced pet food may be labeled.

The newly adopted rules clarify that pet food can be labeled as organic if at least 95% of the weight of its agricultural ingredients is organic. This clarification is critical, since there is currently no organic insect legislation at the European level, and pet food manufacturers who want to complement their mix with nutritious insect-derived protein can make use of the 5% leeway.

### Proposed rules for insect use

Discussions are ongoing between the EC and EU member states with the aim of establishing organic production rules for farmed insects. Last year, the Expert

Group for Technical Advice on Organic Production was asked to make recommendations. Its opinion is expected to be published before the end of 2024.

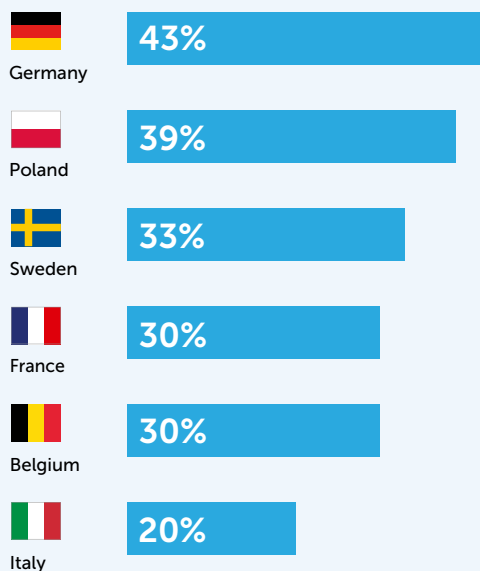
EU discussions should resume once this report has been published, paving the way for possible adoption of new rules during 2025. In the context of these discussions, IPIFF advocates for tailor-made rules that could apply to the insect farming reality. Current EU legislation does not take into account invertebrate animals such as insects, which may lead to unrealistic standards.

Insect ingredients complying with these future EU standards for organic insect production would also be eligible for use in organic pet food, above the 5% leeway to be authorized under the new horizontal EU rules on organic pet food. ♦

<sup>1</sup> IPIFF Guide on Good Hygiene Practices for EU producers of insects as food and feed, p.23, February 2024

<sup>2</sup> Regulation (EU) 2023/2419 published in the EU Official Journal on 27 October 2023, came into effect on 17 November 2023

### Percentage of EU citizens who have tried insect-based food



Source: IPIFF EU Consumer Acceptance of Edible Insects, October 2023 (n=3,000)





## PUREA AUSTRIA

# The future of sustainable pet nutrition: premium insect protein

PUREA is taking nutrition to a new sustainable level with a hypoallergenic protein sourced from black soldier fly (BSF) larvae.

PUREA has a long history of producing high-quality animal proteins and fats, now leveraging over 80 years of experience. Making use of cutting-edge technology, it develops products that not only meet current pet food market demands but are also anticipating future trends.

### Guaranteed quality

The company currently has 2 high-tech production facilities in Austria. With an extensive product range on offer, it can guarantee consistent high quality as well as reliable supplies for pet food producers across Europe and much further afield.

PUREA proteins and fats stand for quality and sustainability, a company philosophy also clearly reflected in its new line of products made from the larvae of the black soldier fly. This is a protein-rich and environmentally friendly food source, produced under strict ethical and ecological standards.

### Innovative and scalable

Ecofly is a PUREA subsidiary. It manages BSF breeding and fattening at an innovative professional insect breeding center in Andorf, Upper Austria. The larvae are then processed at PUREA's new insect-dedicated facility in Regau, just 60 km from Andorf and not far from Salzburg.

The Regau facility is currently processing 2,500 metric tons of larvae annually into 600 metric tons of BSF protein and 200 metric tons of BSF fat. Plans for the near future are to scale up capacity considerably, to enable the processing of as much as 10,000 metric tons of larvae per year.

### Protein-rich, digestible and hypoallergenic

Producing insect protein uses significantly fewer resources than traditional protein sources. "Our insect farming method is an example of

sustainable agriculture. We help to minimize the environmental impact while producing high-quality proteins," says Benedikt Kohlbacher, Key Account Manager for Proteins and Fats at PUREA.

The company's new products are nutritious as well as being suitable for pets with food allergies – a new solution to a long-standing health issue.

PUREA's insect protein offers a highly digestible, hypoallergenic and protein-rich option with low fat content to effectively meet a pet's nutritional needs. Packed with essential amino acids, vitamins and minerals, it can enhance a pet's health and vitality. The brand's insect fat is rich in lauric acid and provides antimicrobial benefits too. It is already being used in a variety of pet foods. ♦

**PUREA Austria GmbH**  
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# WetPro<sup>15</sup>: a high-quality mealworm pulp for the wet pet food market

**WetPro<sup>15</sup> is a mealworm paste that combines premium nutrition with eco-friendly benefits. Find out why you should replace animal-based proteins in your pet food formulations.**



**Bénédicte Lorrette**  
*Research & Development Director*  
Ynsect SAS  
[ynsect.com](http://ynsect.com)

Sprýng, powered by Ynsect, is proud to launch WetPro<sup>15</sup>, an innovative wet protein ingredient designed for the pet food market. Combining nutritional excellence with a low environmental 'pawprint', WetPro<sup>15</sup> serves as an ideal substitute for traditional animal-based proteins in pet food formulations.

## Competing with traditional protein sources

The pet food industry faces the challenge of achieving 'nutritional sustainability': producing high-quality products while minimizing environmental impact. In this context, Sprýng highlights its new ingredient, WetPro<sup>15</sup>, a palatable wet pet food ingredient. WetPro<sup>15</sup> is made from whole mealworms bred in biosecure insect farms in France and then blanched and ground. The pulp offers high protein content (15% in its current form, 60% when dry) and low fat (8% in its current form, 32% when dry).

Mealworm protein stands out for its excellent digestibility and is competitive with high-quality traditional protein sources like lamb and beef. The in vitro and in vivo digestibilities of WetPro<sup>15</sup> have been measured to be greater than 90%.

WetPro<sup>15</sup> also features a beneficial fat profile. It not only contains less fat compared to meat ingredients, resulting in a higher protein-to-fat ratio, but also provides healthier fats. Mealworms are a natural source of linoleic acid, an essential fatty acid, and oleic acid, a type of w-9 unsaturated fatty acid.

## Achieving nutritional sustainability

Regarding environmental responsibility, mealworm larvae have a significantly reduced footprint compared to traditional protein sources. They require only 5-10% of the land and 10-20% of the water needed for lamb and beef production. Life cycle analysis has shown the climate change impact of WetPro<sup>15</sup> to be 0.8 kg CO<sub>2</sub>-eq/kg, comparable to chicken mechanically deboned meat (MDM), and substantially lower than that of lamb MDM and pure meats.

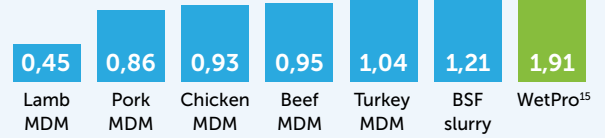
### Smooth transition for manufacturers

Using WetPro<sup>15</sup> as an ingredient in pet food offers great nutritional sustainability. However, it is important to consider the modifications pet food manufacturers might need to make to their current recipes. Luckily, the binding properties and consistency of WetPro<sup>15</sup> closely match those of existing ingredients, ensuring a smooth transition for manufacturers.

Tests compared a standard pet food pâté made with 50% chicken MDM to pâtés where some of the chicken MDM was replaced with WetPro<sup>15</sup> at concentrations of 10%, 20%, 30% and 40%. In each case, the pâtés containing WetPro<sup>15</sup> demonstrated excellent binding properties, with a slightly more homogeneous, compact and softer texture compared to the reference pâté. These characteristics help optimize production and reduce waste.

All test pâtés maintained the same crude protein content as those made with chicken MDM, while the fat content decreased significantly with higher proportions of WetPro<sup>15</sup>. This makes WetPro<sup>15</sup> a strong candidate for weight management formulations.

### Protein/fat ratio



Source: Ynsect

### Minimal adjustments

Its high-protein, low-fat profile makes it an ideal ingredient for wet pet food formulas. The low-fat content enables pet food manufacturers to add essential fatty acids, for example for kittens and puppies. Additionally, as a novel protein source, WetPro<sup>15</sup> could serve as the basis for a hypoallergenic diet.

In conclusion, WetPro<sup>15</sup> offers pet food manufacturers a versatile, premium ingredient with a low environmental impact. By incorporating WetPro<sup>15</sup> into their formulations, manufacturers can enhance their product offerings with minimal adjustments to their existing processes. ♦

# Cutey

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# The soaring demand for insect protein

As the many benefits of this source of protein are increasingly recognized, the insect production sector is stepping up.



**Joy Nelloolichalil**  
*Editorial Manager*  
*GlobalPETS*



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

2024 marks a significant turning point for the alternative protein sector. The surge of interest in insect-based pet food has fueled innovation and expansion on different fronts, from upgraded facilities to targeted artificial intelligence (AI) implementation and total digitization projects.

## Companies scaling up

Nasekomo, a Bulgarian manufacturer in the insect protein market, is actively expanding its production capabilities after receiving a capital injection of €8 million (\$8.9M) at the beginning of the year. It plans to open a new factory in its home country by 2026. This will enable the company to achieve its goal of converting 100,000 metric tons of organic by-products into 25,000 metric tons of high-value insect protein each year.

Meanwhile, the South African company Maltento is making strides in the use of agro-processing waste for different industries, including pet food and aquaculture feed. It currently diverts over 500,000 kg of this waste from local landfills each month, aiming to increase that amount to 600,000 kg. Ongoing facility upgrades will give the firm the opportunity to boost its production capacity from approximately 120 to 300 metric tons by June 2025.

Spanish insect protein producer Bioflytech, which currently produces 12,000 metric tons of fresh black soldier fly (BSF) larvae per year, aims to reach 90,000 metric tons after the expansion of its facilities in the north-west region of Galicia. The company allocates 95% of its production to pet food and 5% to aquaculture feed.

## Key growth drivers

Some reports forecast that the demand for insect protein will surge from 120,000 to 500,000 metric tons by 2030, with over half of the current production in Europe already being used in pet food. Nasekomo co-founder Marc Bolard tells PETS International: "We're seeing a significant rise in the global demand

[▶ SEE NEXT PAGE](#)

for sustainable protein sources, and insect protein – especially from BSF larvae – is at the forefront of this trend.”

Demand is also informing Bioflytech’s future business plans. “There’s great demand for our products due to a shortage of protein and fat in the international market, which is very likely to continue or even increase.

This has made us realize that it’s a good business to be in, so we’ve scaled up our production to a higher industrial level,” says CEO Jesús Rodríguez.

For French insect producer Ÿnsect, the sustainability aspect is significant too. “More and more consumers are concerned about the impact of their purchases and are turning to alternatives that are both healthy and more sustainable. Insects are part of the solution,” the company states.

### AI and robotics up efficiency

Rapid advances in the industry, plus the influx of new competitors, are pushing biotech companies to strive for ‘firsts’ in various areas, seeking market differentiation through patents and innovative technologies. Some players are harnessing the power of AI to revolutionize production processes.

Ÿnsect, for instance, utilizes AI alongside robotics and computer vision to enhance efficiency in its vertical farms. This includes monitoring, feeding, sorting and managing the insects to streamline production and improve overall output. Technology is also helping the company to breed mealworms in stacked trays organized by life stages, significantly minimizing land use.

Similarly, Nasekomo has implemented an AI-assisted insect bioconversion expansion and partnered with Siemens for the digitization of its business. According to Bolard, AI and data are streamlining the entire farming process. “These innovations are improving efficiency, reducing costs and making insect protein more competitive with traditional sources – a game changer for the market,” the co-founder of Nasekomo explains.

***Some biotech players are harnessing the power of AI to revolutionize production processes.***

### Milestones in market expansion

A positive sign for the development of the insect-based pet food industry is the growing recognition of alternative proteins by governing and authoritative bodies. Real Pet Food, for example, has made the headlines as the first Australian pet food manufacturer to secure an exclusive import permit for pure BSF meal.

Australia’s Department of Agriculture, Fisheries and Forestry (DAFF) has seen a rise in interest from pet food manufacturers in importing insect meal. PETS International has had confirmation from the government body that it is currently undertaking biosecurity assessments of “several” import permit applications for BSF products for various end uses, including pet food, signaling a promising future for this sector in Australia.


Earlier in the year, Ÿnsect obtained the first US authorization from the Association of American Feed Control Officials (AAFCO) for the use of defatted mealworm proteins in dog nutrition. This safeguards its position, with the company holding over 440 patents across 70 countries.

In late 2023, Veolia Bioconversion Malaysia, one of the largest insect protein producers in Asia, received approval for its insect meal and oil exports to the European Union. This summer, the Singapore Food Agency approved 16 insect species for both human and animal feed applications.

### Investing in the future

Players in the insect pet food space agree that future category growth is poised to be driven by increasing recognition of the benefits of insect-derived components and broader global sustainability trends. Maltento says that there needs to be significantly more investment and focus on the BSF larvae’s nutraceutical benefits – exoskeleton chitin, antimicrobial peptides and medium-chain fatty acids – to really unlock the potential of insects for the world today.

For Nasekomo’s Bolard, this influx of new companies in the insect space is a positive sign of the industry’s vitality, but it also raises the question of potential market saturation in certain regions, particularly where the category is growing rapidly. ♦



# How do squid and shrimp rate as novel protein sources for dog food?

Facing mounting challenges both economically and environmentally, the pet food industry is increasingly looking at utilizing aquatic organisms in its formulations.



**Ana Rita Cabrita**

*School of Medicine and Biomedical Sciences (ICBAS), University of Porto*



**Joana Guilherme-Fernandes**

*School of Medicine and Biomedical Sciences (ICBAS), University of Porto*

The growth of the global pet population, mainly in developed countries, brings concerns about the economic, environmental and social sustainability of the pet food industry. Challenges include competition for ingredients with livestock and human food systems, the increased demands for quality and the environmental impact of rising pet food production.

## The protein problem

Among macronutrients, protein stands out as the most expensive in both economic and ecological terms, making it arguably the nutrient that requires the most attention in terms of sustainability. Therefore, increasing interest has emerged in alternative protein sources to replace conventional ones.

From a circular economy perspective, the utilization of by-products from aquatic sources holds the promise of alleviating negative environmental effects through waste reduction and enhancing economic and environmental efficiency.

This approach is particularly important due to the high volume of waste from aquatic production, particularly in regard to crustaceans and molluscs.

The utilization of by-products from these resources, with high protein content and bioactive compounds, may offer antioxidant, anticoagulant, anti-cancer, anti-inflammatory and antimicrobial effects that could be appealing to dog owners who are looking for functional pet foods.

## Research into squid and shrimp

Although squid meal and shrimp hydrolysate have been studied as alternative feeds for livestock and are commonly used in the aquaculture sector, the information on dogs was non-existent.

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***Among macronutrients, protein stands out as the most expensive in both economic and ecological terms.***

However, researchers at the School of Medicine and Biomedical Sciences, University of Porto recently evaluated the chemical composition and antioxidant activity of these marine by-products from the human food chain and the effects of increasing levels of their dietary inclusion (5%, 10% and 15%) on palatability, digestibility, fecal characteristics, metabolites and microbiota of healthy adult dogs.

**Chemical composition and antioxidant activity**

Both by-products have proved to be great sources of protein (66% and 81% of crude protein, dry matter basis, respectively for shrimp hydrolysate and squid meal) and amino acids, particularly of arginine, lysine, leucine, glutamic acid plus glutamine and tyrosine, being the methionine content higher than that of ingredients traditionally used in dog food formulation.

While both marine by-products were shown to have antioxidant activity, this was heightened in shrimp hydrolysate, likely due to the presence of peptides released from protein breakdown during the process of enzymatic hydrolysis.

**Palatability**

Palatability is of crucial importance as it can affect food consumption. The addition of palatability enhancers is a common practice in the pet food industry and protein hydrolysates are extensively employed for this purpose. A dietary inclusion of 15% of shrimp hydrolysate and squid meal did not affect first approach and first taste, both being protein sources well accepted by dogs.

**Diet digestibility**

The number of defecations, fecal dry matter content and consistency score – all highly valuable parameters for dog owners – were not affected by increasing levels of squid meal and shrimp hydrolysate inclusion. Digestibility is also of importance to pet owners. The experimental diets increased the digestibility of dry matter, nutrients and energy, with the major difference observed for protein, demonstrating the

high potential of these ingredients to be included in highly digestible diets for dogs.

**Fecal metabolites and microbiota**

Gut health is influenced by a large variety of complex factors, and diet plays an important role in modulating microbiota profile and fecal metabolites. Generally, the inclusion of squid meal had no effect on fecal pH, ammonia-N and total short-chain fatty acids production and profile.

Similarly, fermentation parameters were not affected by the level of inclusion of shrimp hydrolysate, but when compared with the control diet, this protein source increased total short-chain fatty acids production and individual concentrations, except for butyrate, which was unaffected.

It must be emphasized that the increase of acetate and propionate concentrations with shrimp hydrolysate inclusion might benefit canine health, namely through regulating host metabolic, immune and neuro-immuno-endocrine responses, and by lowering cholesterol.

No differences in the diversity of microbiota of feces of dogs fed the control diet and either squid meal or shrimp hydrolysate were observed, comprising mainly genera pertaining to Firmicutes, namely *Turicibacter* and *Blautia*, which are indicators of a healthy gut. Conversely to squid meal, feeding dogs with different levels of shrimp hydrolysate diets affected microbiota composition, suggesting the potential of shrimp hydrolysate as a prebiotic.

**Unlocking the potential**

The potential of human food chain by-products, especially seafood, to be included in pet food is enormous and, at present, underexplored. A global effort should be made to maximize the usage of such products – both from a circular economy perspective and in order to take full advantage of their bioactive compounds. ♦

*\* Guilherme-Fernandes et al., 2024; Frontiers in Veterinary Science 11:1360939*





## Get ready for Zoomark 2025!

The global pet industry will meet again in Italy from 5 to 7 May 2025. The 21st edition of the international pet food and pet care trade show will present new areas, add a new hall and be a magnet for top exhibitors and visitors from every continent.

Zoomark 2025 aims to exceed the record numbers of the 2023 show: more than 68,000 sq m of exhibition space, 1,060 exhibitors from 57 different countries and 27,950 attendees. The event promises an even more dynamic and diverse showcase of companies in the pet industry, attracting global visitors with its enhanced International Buyers Program. This initiative will connect suppliers and buyers through pre-scheduled B2B meetings, fostering greater business opportunities.

### 3 reasons to exhibit at Zoomark 2025

Zoomark serves as an international hub for global pet distributors, brand owners and manufacturers, making it the ideal place to:

1. Grow your business, engage with existing or potential customers, forge new international partnerships and network with peers and competitors. Not only during the show, but also in the beautiful, inspiring atmosphere of Bologna, located in the heart of Italy's Food Valley.
2. Showcase innovations, new products and market trends, especially within the Pet Vision area, which is the core of Zoomark.
3. Get inspired and gain valuable insights into future market trends through Zoomark's extensive program of educational sessions, including round tables, conferences, talks and live presentations.

### New areas: introducing Factory and Atelier

Zoomark 2025 will introduce two exciting new projects to attract a broader range of exhibitors and visitors.

#### Factory

The ideal stage for companies across the supply chain, Factory will include those specializing in raw materials, innovative pre-mixes, semi-finished products, equipment, packaging, logistics and services for manufacturers and distributors of pet food, accessories and pet care products. It will offer these companies a perfect platform to engage with the thriving, resilient pet industry at Zoomark. The market, valued at €7 billion (\$7.78B) in Italy alone, is not only stable but also recording double-digit growth every year, promising long-term benefits for businesses.

#### Atelier

Representing a premium space for top buyers, brands and businesses, Atelier will be a special area launched at Zoomark 2025 to highlight excellence in the worlds of pet food and pet fashion, design and beauty for the first time. ♦

**Register to exhibit or attend now at [zoomark.it](https://zoomark.it)**

# TikTok Shop: the latest retail frontier for pet brands?



The in-app shopping platform is a new target for companies looking to generate brand awareness and increase sales.



**Joy Nelloolichalil**  
Editorial Manager  
GlobalPETS

Video hosting giant TikTok's shopping function is quickly becoming crucial to pet players who want to tap into a younger audience. With around 80% of US online users aged between 16 and 34 years engaging with the app, interest is rapidly ramping up.

## A brush with success

TikTok Shop is currently available in Indonesia, Malaysia, Philippines, Saudi Arabia, Singapore, Thailand, UK, US and Vietnam.

Since the shopping platform was launched in the UK in 2022, TikTok says that pet brands with a presence on the channel are enjoying success.

TikTok shares with PETS International the example of pet brand Groomi Pet Care, which became the first pet business in the UK to hit £1 million (\$1.3M/€1.18M) in sales on its platform. "[Groomi's] pet brush became the top-selling item in the pets category in 2023,

accounting for 95% of its total revenue," says a spokesperson.

Herbal Dog, another UK-based pet business, is also exhibiting strong growth within this segment on the platform with its herbal supplements, natural grooming products and pet treats. It is believed that it is generating monthly sales of around £100,000 (\$132,800/€118,850).

## Content partnership

One of the latest pet businesses to join TikTok Shop in the US – launched in September last year – is cultured meat producer CULT Pet Food.

The firm is currently partnering with over 1,000 TikTok creators and affiliates to create content that showcases the benefits of its sustainable pet food products.

"By getting them samples for their pets to try and incentivizing them with a percentage of sales, we feel we can reach a much larger demographic than by just putting out content ourselves," says company CEO Mitchell Scott.

The initial signs of growth in the platform are promising and it is going to be one of its most important online sales channels moving forward. "On TikTok, it is much easier to build the brand by educating and entertaining potential consumers with video content," he notes.

According to data-gathering company Statista, TikTok is projected to reach close to \$18.5 billion (€16.6B) in ad revenue on a global scale this year.

### European consolidation

TikTok plans to launch its in-app shopping platform in Spain and Ireland this year and expand to more European countries in 2025. However, the expansion across the continent also comes with regulatory scrutiny.

Recently, the platform made commitments under the European Union's new social media law, the Digital Services Act (DSA), which aims to protect users from online risks. As part of these promises, TikTok will permanently withdraw its reward-to-watch feature, a gift voucher program tied to screen time in its TikTok Lite app for EU users. ♦

TikTok offers different ways for brands to promote their products so that customers can shop directly from ads on the platform:

- **LIVE Shopping:** allows brands to showcase products in real-time during livestream videos, where viewers can tap on pinned products and purchase without leaving the app
- **Shoppable Videos:** short, in-feed clips that feature product links, making it easy for users to shop while scrolling, with videos typically lasting 9 to 15 seconds
- **Product Showcase tab:** acts as a catalog, allowing brands to display a wide range of products for users to browse and purchase directly

# The networking event of the year

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- Torsten Toeller, Fressnapf



AllerPetfood

*"The networking is more intense and effective than when we have tight schedules during trade shows and the like."*

- Henriette Bylling, Aller Petfood

More info? [globalpetindustry.com/GPF](https://globalpetindustry.com/GPF)

# How can pet grooming continue to boom?

According to some estimates, the value of the grooming market could double by 2032. We look at where this growth is coming from and the trends that are influencing it.



**Edgar Maciel**  
Contributor  
PETS International

The global pet grooming industry is on a strong growth trajectory, not least due to the rise in DIY grooming. What does this mean for professional grooming services? And how is technology playing a role?

## The humanization factor

As a result of the humanization trend, consumers are increasingly demanding products and services that enhance their pets' well-being and appearance as well as physical health. This has been a major driver of growth in the global grooming industry, which has responded by introducing multiple new concepts: from gentler shampoos and conditioners to more compact, user-friendly grooming tools and luxurious personalized services.

In fact, according to some predictions, the pet grooming market – which was valued at \$9.1 billion (€81.8B) in 2023 – could double by 2032. However, despite these growth expectations, there is one significant concern: inflation. Rising costs are pushing more pet owners towards home grooming solutions for essential daily pet treatments such as baths, trims and other accessory-based services.

## Feeling the impact of inflation

In the United States, which accounts for almost 40% of the global grooming market, a survey by Packaged

Facts revealed that nearly 3 in 10 pet owners reported that their ability to purchase non-essential items has been affected by the current economic climate, impacting the affordability of services for their pets.

Similarly, a recent study from the American Pet Products Association (APPA) reveals that 47% of pet owners in the US have performed grooming tasks at home in 2024, marking a 5% increase compared to 2018.

As a result, pet owners are increasingly investing in do-it-yourself (DIY) grooming tools. 81% of dog owners and 76% of cat owners report owning some kind of grooming equipment, with nail clippers and grinders seeing significant growth in popularity. But owning the right equipment is not always enough. Owners also need to know how to effectively apply grooming techniques in practice.

## Online support for DIY grooming

Dremel, a brand specializing in rotary tools specifically designed for pet trimming, recently launched pet nail trimming kits focused on easy control and low noise impact for pets. However, the company noticed a market problem: pet owners' difficulty when operating the equipment and fear of potentially hurting their animals.

To address this, earlier this year Dremel developed an online course to teach pet owners how to handle the tools, techniques for pet nail trimming, and which instrument is best suited for each pet. In just 5 months

since being made available online, the classes have been accessed by more than 50,000 customers.

Another company providing tips and guidance to improve the at-home grooming experience is US dog daycare and spa company Dogtopia, which has recently partnered with Obsess to create an artificial intelligence (AI)-powered tool that allows customers to have an immersive online experience with the brand's products.

Meanwhile, launched in July, Wiggly is an app with an AI-assisted chat that offers 6 conversation modules to answer questions about pet care. Using data from pets and their owners, the AI anticipates the needs of pets, offering alerts, care suggestions and health guides. Pet parents can also seek expert advice about the best solutions for their pet's coat, skin, bathing and grooming needs.

### Cost-effective and comfortable

"We've seen an increase in DIYing across the board. From homemade dog beds and cat scratchers to grooming, pet parents are taking matters into their own hands when it comes to caring for their furry friends," notes Ed Pchola, Dremel's Director of Operations.

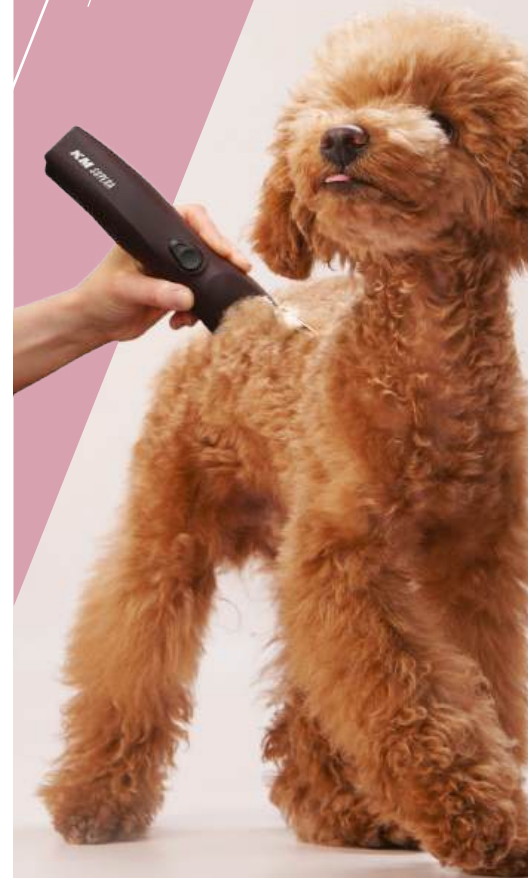
Pchola acknowledges that economic conditions are driving the growth of home grooming. "Consumers are paying close attention to where they spend and invest their money. If they can save time and money by not having to travel to a groomer, more are choosing that option," he says.

But other factors are also at play, according to Pchola. "Users have found that not only is this a cost-effective option, but that their pets find it to be a much more comfortable, stress-free experience. Based on the growing demand for at-home grooming tools, we envision that this trend will only continue to increase."

### E-commerce and mobile services

This does not mean that demand for professional services has decreased. On the contrary, the number of pet owners seeking services from retailers has doubled in the past 6 years, rising from 6% in 2018 to 12% in 2024. Among cat owners, 19% now seek professional grooming services.

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With the emergence of mobile platforms, technology offers a solution for pet parents who are seeking convenience, speed and enhanced well-being for their pets, along with more customized treatments. For example, pet care marketplace Groomit, founded in 2016, offers grooming and vet services directly in clients' homes across 18 US states.

Groomit's primary growth occurred during the pandemic, when the business grew by more than 30% while pet shops and salons were closed. So far, the platform has provided around 140,000 individual services this year.

The next step is to incorporate AI into the platform. "We will match specific groomers that know how to groom specific breeds best. Also, we will allow clients to see what different haircuts will look like on their dog using a photo of their pet," Groomit founder Anna Zege tells PETS International.

### Minimizing animal anxiety

To address the issue of anxiety and fear that dogs and cats experience in unfamiliar environments, the market has seen the appearance of new players offering low-stress alternatives in recent years. For example, economist Laura Rodrigues founded the Bable Pet franchise, which operates in São Paulo, Brazil, in 2020.

"We understand the humanization process our pets have undergone over the past few years, but I believe

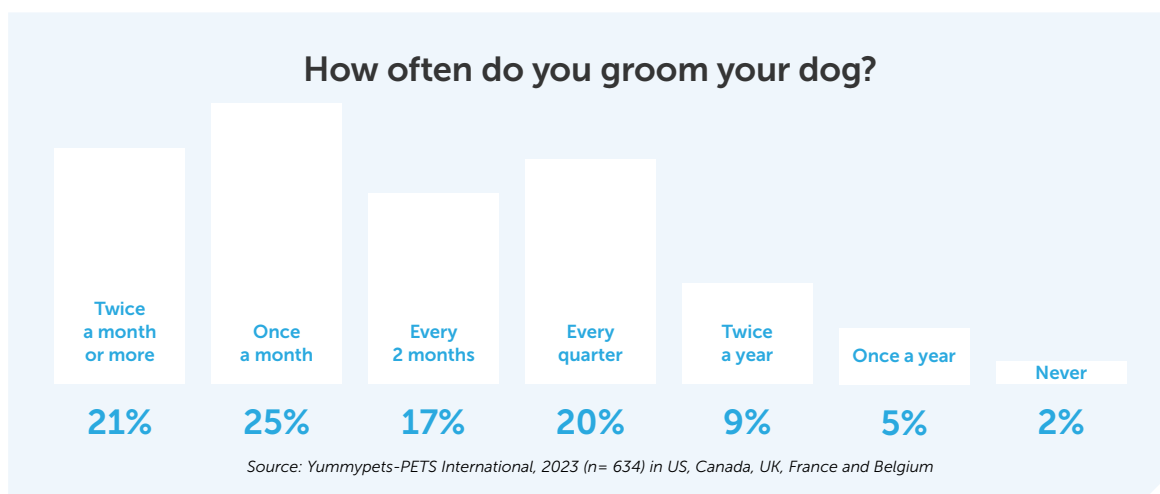
***With the emergence of mobile platforms, technology offers a solution for pet parents who are seeking convenience and speed.***

that in grooming there were excesses that caused fear and anxiety in animals in grooming environments," says Rodrigues.

The main differentiator of the business was abandoning the luxury boutique approach and focusing on dogs' needs for a fear-free and safe grooming experience. All units have a spa-like atmosphere, with classical music, breed-specific shampoo and conditioner lines, calming pheromones, bathtubs adapted to the animal's size and noise-free drying. The network chooses not to use perfumes, dyes or accessories in grooming.

The first Bable Pet unit was opened in October 2020 in Piracicaba, a city in southeast Brazil. The grooming area is 150 sq m, featuring an 'island bathtub' made entirely of glass, allowing the owner to watch their dog during the procedure. The idea was to invest in space to ensure that clients wouldn't need to make an appointment.

Initially, clients may be surprised by the approach, says Rodrigues, but later they see it as a unique feature. And it clearly works; after less than 3 years of operation, there are 9 franchises, and more than 2,000 dogs serviced per month.





### Young owners value well-being

Being located in one of the world's largest cities means that the client profile is more open to this prioritization of animal well-being above all. "Our client is young, millennial, and the majority recently chose to adopt a pet to be part of their family circle. They don't want an animal that helped them through one of humanity's most difficult times – like the pandemic – to suffer," Rodrigues notes.

The company also utilizes technology to offer pet owners extra choice and convenience, according to Rodrigues: "The client can choose the shampoo they want to use for their dog's bath through our app, for example, and the information goes directly to the groomer. Similarly, if a flea or tick is found, the owner is notified through the app, which presents treatment solutions."

About 70% of Bable Pet's revenue comes from its grooming subscription system, which offers baths up to 20% cheaper. The average ticket is R\$100 (\$18/€17) with a frequency of one bath per month.

"Initially, my idea was that the owner could do the grooming process in our stores, supported by the assistance and expertise of our staff. But here in Brazil, it didn't work because we are still a service-oriented country, where the service itself drives clients to seek a subscription," explains the CEO.

### Specialists as facilitators

Rodrigues does not see home grooming as a competitor to big chains, but instead believes that specialists should be facilitators, helping the owner to better manage their pet at home. This creates a complementary situation.

Providing that high-quality services are offered in-store, loyalty happens naturally, ensuring that clients keep coming back to professional service providers for their pet grooming routine, she concludes. ♦

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## Regional report: Belgium and the Netherlands

# Innovative trends challenge the status quo

The pet retail landscape across the Northwestern European countries of Belgium and the Netherlands has remained relatively stable over recent years. Could the rise of premium products and the drive towards sustainability be the start of a shake-up?



**Tom Cassauwers**

*Contributor*

*PETS International*

Belgium and the Netherlands make up a diverse and strong pet market and, while the level of demand has not seen significant fluctuation in the past few years, growth has been driven by the premium and alternative segments.

### Unchanged pet populations

According to Benita Beekhof, Association Manager of NVG, the Dutch National Association of Pet Food Manufacturers, the regional pet market is divided

between larger multinationals and small to medium-sized enterprises. "There's a healthy balance between those 2 types of players," she says. "The total size of the market is relatively stable. In the Netherlands, the number of pets has remained largely unchanged over the past few years."

This year, NVG released a survey showing that there were 22.6 million pets in Dutch households in 2023. That represented a slight increase of 500,000 pets compared to 2022. According to the same study, pet owners in the Netherlands spend a monthly average of €56.90 (\$61) on pet food and €15 (\$16) on pet supplies.

In Belgium, there was a slight decrease in pet ownership during that period. A study conducted by the Belgian Association of Pet Food Manufacturers showed that 58% of Belgian households had at least 1 pet in 2024, compared to 59% in 2023 and 57% in 2022.

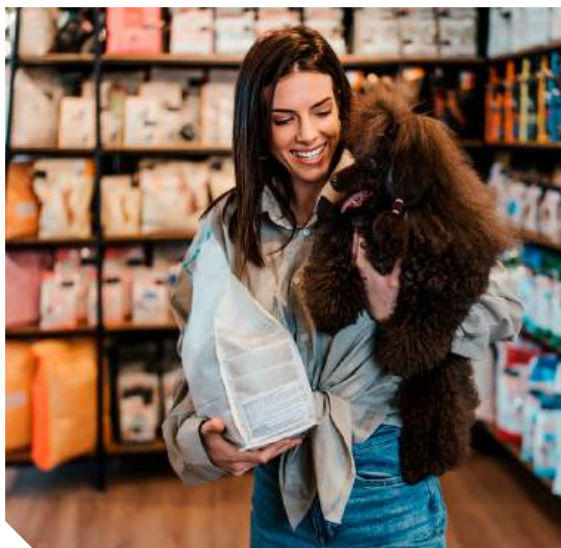
### Recent acquisitions

Consolidation between players is likely in such a stable market. This year, 2 large acquisitions have taken place in Belgium so far. Belgian pet retailer Tom&Co has acquired the Belgian online pet pharmacy owner Barq Europe, which is also active in the Netherlands and France, while US multinational General Mills has bought Belgian premium pet food company Edgard & Cooper.

"The acquisition will help us to scale up even further," says Maaïke Pieters, Marketing Manager at Edgard & Cooper. "General Mills has R&D and product development capacities that are hard to build up in the first few years of a smaller company like ours. So General Mills can help us overcome those growing pains."

### Innovative smaller players

Edgard & Cooper was founded in 2016. Today, its annual revenue is approximately €100 million (\$112M), and it employs 200 people. This growth shows how smaller players can do well in these markets, particularly if they focus on new segments such as premium dog food.



***While a start-up like PAWR is selling its products in pet stores, it also relies on online retailing to get its products out to consumers.***

Another young company in the region is Dutch start-up PAWR, a pet food supplier that makes vegan dog food. It currently sells its products in Belgium and the Netherlands, and is starting to expand to Asia. The company won the Fressnapf Sustainability Innovation Award last year.

"It's not easy being a small company in this industry, yet there are more opportunities today," says Fia Luijterink, CEO and co-founder of PAWR. "Of course, we have to compete with the large pet food companies, who obviously have a strong presence in retail chains. But consumers are increasingly asking for smaller players like us and unique concepts, which is why a chain like Pets Place is also stocking our products."

### From traditional to forward-thinking

New consumer trends are driving the rise of players like PAWR and Edgard & Cooper. "What you see is further humanization of the pet market," says Beekhof. "Pets are increasingly viewed as part of the family, and owners want to translate their consumer choices to their pets. Trends in human food, such as organic, vegetarian, vegan or alternative proteins, are all being reproduced in the pet food market."

Beekhof does note that these trends still represent a minority of the market. According to the NVG's 2024 study, a quarter of Dutch pet owners purchase alternative foods, which includes insect ingredients or vegetarian options, just once a year. But humanization does enable growth in markets where pet populations remain largely stable.

"There's more potential [here] than in the French market," says Pieters. "Pet numbers may be stagnant here, but there's a trend towards more premium products. That being said, there are differences between Belgium and the Netherlands. Belgium is the more traditional pet market with fewer smaller players. The Netherlands has a higher number of new players. There we are facing more competition in the premium segment."

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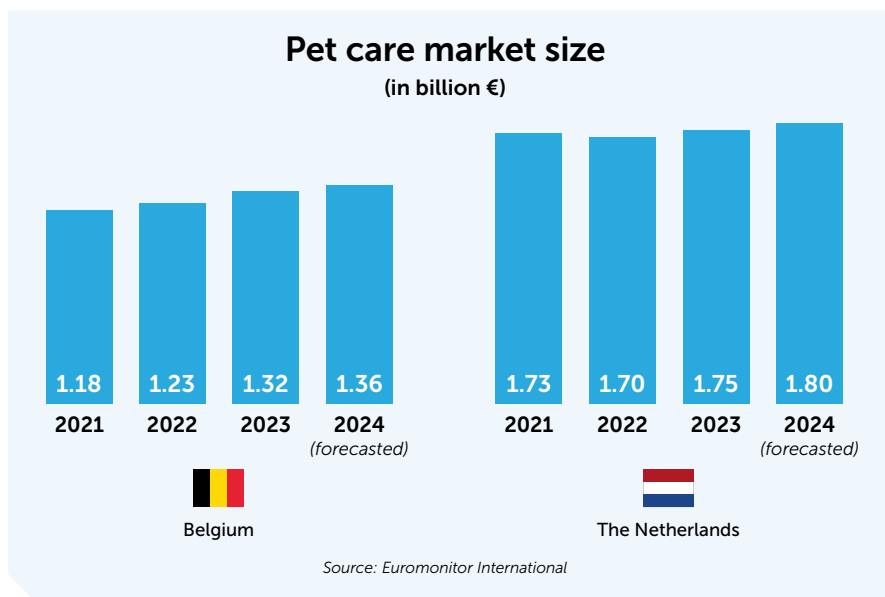
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### Legislation driving sustainability

The push for sustainability is at the same time being driven by new legislation, which is looming large over not just the pet industry, but the entire European economy. The European Commission's Corporate Sustainability Reporting Directive (CSRD), for example, came into force this year. It obliges large companies, and sometimes their suppliers, to state their social and environmental impact.

"Larger companies, in particular, are trying to come to terms with the CSRD and the added reporting burden," says Beekhof. "They need to estimate their carbon footprint, but also deal with things like ecological packaging and developing more sustainable supply chains."

### Getting the message across

E-commerce in the Belgian and Dutch pet industry has become relatively ubiquitous during the last few years. "From internal data we know that online shopping for pets has become a significant part of the market," says Beekhof. "Particularly for bigger animals, such as large dogs – but also for horses – buying food online is now the norm."

And while a smaller start-up like PAWR is selling its products in pet stores, it also relies heavily on online retailing to get its products out to consumers. "And we don't just want to sell food to dog owners, we want to educate them too," says Luijckink.

"The amount of text you can put on a piece of packaging is really not enough," she adds. "We can give owners more information online. And besides e-commerce, we also recognize the importance of investing in educational content on platforms like Instagram and TikTok."

Belgium and the Netherlands seem set to remain a dynamic pet market. "The attention being paid to sustainability can only grow," concludes Beekhof. "Companies are already fully focusing on that. Now consumers are following. So it will be the fundamental force in this market for the coming years." ♦

***According to the NVG study, a quarter of Dutch pet owners purchase alternative foods, which includes insect ingredients or vegetarian options, just once a year.***



Sven De Waele, Chief Digital Officer, Tom&Co

**“We will soon offer 5 to 10 times more products online compared to in-store”**



**Many players in the Belgian market are moving towards omnichannel models, so how can this market leader make sure it continues to evolve and stand out from the competition?**



**David Palacios Rubio**  
*Editor-in-Chief*  
*GlobalPETS*

Focusing on raising standards and accelerating development in both online and offline channels, leading Belgian pet retailer Tom&Co has adopted a strategy that involves pushing forward aggressively to enhance its offerings and services, ensuring that it not only meets but also exceeds market expectations.

Sven De Waele has worked in specialized retail for 20 years and co-founded webshop PharmaPets with his wife Valerie, who is a vet. De Waele is currently wearing 2 hats – since Tom&Co acquired PharmaPets in June,

he has remained CEO while also taking on the job of Chief Digital Officer for the pet store chain. In his new position, De Waele oversees everything related to the company’s e-commerce, digital initiatives and IT. His responsibilities include omnichannel strategy management, which involves integrating all products, stores and future omnichannel features into the organization.

***You are currently undergoing an omnichannel transformation at Tom&Co. What is your main priority?***

The primary focus is on enhancing our e-commerce platform. Currently, Tom&Co’s online presence is minimal. We plan to migrate Tom&Co’s e-commerce operations to the PharmaPets platform.

Specifically, we will move Tom&Co's warehousing to PharmaPets' 7,500 sq m warehouse, which has been expanded by an additional 3,000 sq m this year. We will also integrate the Tom&Co website into PharmaPets' more advanced platform, which excels in areas like subscriptions and customer journey optimization.

**What is the timeframe for that?**

Our goal is to complete these projects by this November, allowing us to integrate online and offline experiences, so that online activities contribute to store visits and overall sales.

**What's your strategy when it comes to online sales?**

With the integration of PharmaPets' knowledge and expertise, we want to improve this balance. We aim to grow the online share of sales significantly. For the broader group, we expect online sales to represent about 15% of total sales this year.

Our long-term target is to increase online to 25-30%. But while online growth is important, it's crucial that we continue to leverage the strengths of our physical



stores, as they offer a competitive advantage over pure online players like Zooplus.

**Is the online assortment going to be impacted in any way?**

Currently, the Tom&Co online assortment is limited to what is available in stores. Our new strategy will vastly expand this assortment, potentially offering 5 to 10 times more products compared to the in-store selection. We aim to include a wide variety of pet food brands to capture loyal customers who may not shop offline.

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**Will the new e-commerce platform be available across all markets where Tom&Co operates?**

Yes, the new platform will be active in Belgium and France. The focus for Tom&Co will remain on these markets. Unlike competitors like Maxi Zoo and Zooplus, who are shifting towards a marketplace model, our strategy will not follow that path.

Instead, we aim to build strong relationships with brands like Flamingo and Trixie, leveraging their full catalogs without needing to stock every product ourselves. This approach will help us maintain a broad assortment while ensuring efficient supply chain flows.

**You've had some positive experience when it comes to subscription models...**

At PharmaPets we started offering subscriptions last year and the response has been very positive. In the Netherlands, over 60% of our sales now come from subscription customers, up from over 50% at the end of last year. Belgium also shows strong results, with over 50% of sales from subscriptions. France, where we launched in October last year, has also exceeded expectations, again with more than 50% of sales coming from subscriptions.

**"We're no longer deterred by the presence of competitors if we still see opportunities to do business at that location."**

**Will you be building on this successful customer loyalty strategy?**

The success of these subscription models has been remarkable, and they have a significant impact on customer retention, as subscription customers are retained 4 times longer than non-subscribers. So, yes, we are exploring the potential of subscription options at Tom&Co.

**What about category performance: which ones are the best and which are the most challenging?**

Dog and cat food, which makes up over 50% of our sales, is growing at nearly double-digit rates. Non-food categories, accessories for example, are facing more challenges. Sales of these items are showing slower growth than previous years, as some customers are buying smaller items or delaying purchases. This shift could be caused by new competitors, such as Chinese players, who might be capturing a portion of the market.

**How do you see the integration of services into your store network?**

Until now, services have been designed primarily for points of sale (e.g. grooming salons, dog washing, insurance). It's time now to take them to the next level and to build a comprehensive ecosystem which will include, for instance, a mix of offline and online services, e-health and, potentially, in-store behavior consultations.

**Which retailers are you taking as a model for this?**

Pets at Home in the UK and Petlove in Brazil are great examples of how to integrate various services into a cohesive ecosystem. Pets at Home combines retail with in-store services, while Petlove started online before expanding into physical stores, vet software and insurance. Chewy in the US also provides useful examples, with vet clinics and subscription models. Combining these elements – retail, vet services, e-health – could help us create a unique and competitive offering.





**When it comes to expansion, are you mainly targeting the Flemish region?**

Tom&Co has a stronger presence in Brussels and the French-speaking part of Belgium. We still have some gaps in the Flemish region, especially East and West Flanders. We plan to open 15-20 new stores over the next few years in those areas.

**What's your approach for new store openings?**

While we initially focused on big cities, our strategy has evolved. We are now looking to even open stores in cities where retailers like Maxi Zoo are located, provided the city is large enough. We're no longer deterred by the presence of competitors if we still see opportunities to do business at that location.

**Where do you want to be in the European pet retailing ecosystem?**

Our goal is not necessarily to become the largest retailer in Europe – but to be the best. That means we are open to exploring new opportunities on a step-by-step basis. Our investment partner, Verlinvest, has significant experience in the pet sector and can provide

valuable insights when we are considering potential expansions. However, our current focus remains on optimizing and expanding within our existing markets.

**Are you planning to expand to new markets in the future?**

Our primary focus right now is to solidify our leadership position in Belgium and accelerate growth in France, a market that presents a significant opportunity for us due to its larger market size. Today, we have 130 shops in Belgium as market leader. As France is six times bigger than Belgium, the market leader there could potentially have around 800-1,000 stores.

Maxi Zoo is the current leader with 300 stores, while we have 70. We would not expect to become the market leader in France, but be a strong challenger – growing to 200-300 stores in coming years. ♦

***"The success of subscription models has been remarkable, and they have a significant impact on customer retention."***



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# Gaining insight into Belgian pet parents' purchasing behavior

Where do pet owners in Belgium prefer to get supplies? And what do they value most when buying pet food?



**David Palacios Rubio**  
*Editor-in-Chief*  
GlobalPETS

Fresh data from the Belgian Association of Pet Food Manufacturers and Distributors (BEPEFA) shared with PETS International shows the current picture of consumer behavior in the country when it comes to pet products.

## Retail preferences

Pet stores and supermarkets continue to be the preferred channels for Belgian pet parents to purchase pet food and supplies. Dog owners prefer pet stores the most (72%), while cat parents mostly buy these items from supermarkets (80%).

Supermarkets are the preferred retail channel for daily purchases, with 11% of Belgian pet parents using them every week. The number of pet parents who visit pet stores weekly is just 3%.

However, as many as 37% of Belgian pet parents visit a pet store monthly, which is followed by supermarkets (30%). The number of pet owners who buy pet food from their vets on a monthly basis, meanwhile, has declined from 12% in 2023 to just 7% this year.

Nearly 70% of Belgian pet owners buy pet supplies via offline channels, while more than half say they use online channels at least once a year.

## Purchasing habits

Almost half of the respondents said they go to a store having already decided on which pet food to buy, while over a quarter (28%) compare the brands in-store or on the store's website, and 20% do not pay attention to the brands they buy.

In 2023, price was one of the top 3 most important factors involved in pet food purchasing decisions for almost half of the respondents (49%), followed by food tailored to their pet's particular life stage (45%) and food with high palatability (41%). Origin (6%), sustainability (9%) and where specific ingredients came from (9%) ranked least important.

## Expenditure and inflation

The data reveals that Belgian pet parents are willing to spend a maximum of €107.60 (\$115.60) per month on their pets, with pet food representing up to €70.10 (\$75.30) of this. Nearly 4 out of 10 pet parents look to spend between €26 (\$27.90) and €50 (\$53.70) each month on pet food. This is followed by those with a budget of up to €25 (\$26.80).

According to the BEPEFA, 64% of pet parents in Belgium say they are ready to pay more for pet care costs in the current inflationary environment. This figure has improved by 3% compared with 2023.

The number of consumers looking for cheaper options decreased from 19% in 2023 to 17% this year. ♦

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Ard Malenstein, Managing Director, Pets Place

## “We want to launch our full online product assortment in Germany”



The ambitious Dutch pet giant is optimizing its strategy by focusing on hyper-personalization and fine-tuning its understanding of target markets.



**David Palacios Rubio**  
Editor-in-Chief  
GlobalPETS

Pets Place currently has 175 stores in the Netherlands and opens approximately 12 new shops each year – its gameplan being to close smaller locations and open larger ones. By continuing to refine this approach – with an ultimate goal of 230 stores – it hopes to keep expanding its coverage across the region.

Managing Director Ard Malenstein comes from a family with a background in wholesale and retail, and has now been in the pet industry for well over 25 years. He tells PETS international about the company’s plans to personalize its services for each individual consumer

and explains how he is setting his sights on one of the largest pet markets in Europe.

### *Where does Pets Place fit into the regional pet retailing ecosystem?*

We are an omnichannel retailer, very focused on digital and consumer engagement. We position ourselves at the upper end of the market, targeting pet lovers who value advice on keeping their pets healthy.

### *How are data and technology supporting your strategy?*

Our omnichannel strategy begins with understanding our customers: who they are, where they are, their age, and what type of pet they have. The challenge was to consolidate this information into a data warehouse for quick and efficient use by pet professionals.

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Traditionally, promotions were uniform, but we aim to shift to hyper-personalization, delivering the right information at the right time. We now have a comprehensive customer view and are training our marketing team to use artificial intelligence (AI) for hyper-personalization.

#### **Exactly how will the new system work?**

Hyper-personalization will involve tailoring content based on these detailed customer profiles. For example, we categorize dogs into small, medium and large breeds, and even further by specific breeds. Automating this process is crucial if we want to ensure timely and relevant information. Additionally, we will focus on quality content, including videos, and collaborate with brands to provide that relevant content directly to consumers.

#### **When do you expect this hyper-personalization to be a reality?**

We plan to begin implementing it in the last quarter of this year. Our goal is to achieve over 1 million opt-ins within 3 years.

#### **What can you tell us about the business online versus offline?**

Currently, our sales split is about 75% offline and 25% online – where we have over 60,000 SKUs available for next-day delivery. What we're seeing is that many consumers shop in both online and offline channels. The key point is that we adapt to what the customer wants, which is – increasingly – convenience.

#### **Which expenditure patterns do you see among your customers?**

Overall, we are experiencing growth in both the number of customers and the average ticket size. Larger stores tend to have higher spend levels due to a wider selection. Online spending is also higher because customers often purchase larger items.

#### **Is there a difference in category performance?**

Non-food categories are growing because we are allocating more space to them on the shelves. The dog and cat product categories are expanding rapidly, especially in larger stores. Rodents and birds have been the hardest-hit categories in the past 2 years. Frozen food sales are growing by 20-30% year-on-year.

***"We now have a comprehensive customer view and are training our marketing team to use AI for hyper-personalization."***

#### **Are alternative ingredients such as insects or cultured meat performing well?**

While we have a limited product range, insect pet food is growing and it currently accounts for 2% of our total sales. There is a broader potential audience if we can communicate the benefits well. In larger stores, this category is given roughly 1 meter of shelf space.

#### **Fressnapf and Maxi Zoo recently entered the Dutch market after acquiring Jumper. Is this posing any challenges to your operations?**

Jumper was already a competitor, but it focused more on discount and mainstream consumers. Currently, Jumper's turnover is around €70 million (\$78M), while we expect to reach €350 million (\$391M) this year. The gap makes it challenging for competitors to match our scale and growth.

#### **How do you see in-store services developing?**

We currently offer dog washing and we have 6 stores with veterinary services. This month we're adding a new vet clinic, and we plan to expand this offering. Our aim is to introduce health points in all stores within 2 years, integrating digital tools to provide health checks and consultations.





### *And the next steps in your expansion plans?*

We plan to introduce our full assortment in Germany online and evaluate customer preferences before opening physical stores there. Our initial focus is on understanding the market and finding the right locations for expansion.

### *You will enter a market with quite strong players...*

Germany indeed presents challenges with its strong online players, but we have confidence because we're doing well in the Netherlands, even against solid competitors. Our focus is on building a successful brand as a retailer offering a broad assortment, which includes many well-known branded products rather than private labels. This strategy resonates with online consumers.

### *Do you have your eye on the big German cities?*

We will look at both large cities and strategic locations nationwide. Our goal is to achieve national coverage with a strong focus on quality and a broad assortment. We will definitely target major cities such as Berlin and Hamburg, focusing on high-quality locations. ♦

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# Small, competitive and catching up with global trends



**What's going on in Estonia, Latvia and Lithuania? We look at the growth drivers, as well as the challenges, for pet retailers and manufacturers operating across the Baltics and how they can extend their reach.**



**Alexander Welscher**

*Contributor*

*PETS International*

The increased focus of Baltic pet owners on quality and health is driving market growth. However, consumer behavior, spending patterns and even product choices are affected by the overall economic situation. PETS International asked industry insiders to share their insights into product trends, e-commerce, manufacturing challenges and future growth opportunities.

## A valued part of the family

Wild animals such as bears, lynxes and wolves thrive in the forests, bogs and coastal ecosystems of Estonia, Latvia and Lithuania, which are among Europe's least densely populated nations. But pets can also enjoy a good life in these Baltic countries, where they have become cherished members of the household.

The pet products market in the Baltics has experienced significant growth in recent years and pet owners are sparing no expense when it comes to providing for their beloved companions, even though the overall economic situation and pet food market have been negatively affected by the war in Ukraine.

## Rising interest in pet well-being

Trends in Estonia, Latvia and Lithuania are generally similar to most other European nations, with owners showing increasing interest in their pets' general health and well-being, and becoming more conscious of the need for good nutrition. Additionally, demand is growing for veterinary care and other pet services.

"People's care habits for pets have changed, which is also evidenced by the growing demand for toys and various food products for their four-legged friends. Pet menus are planned as complete meals, combining dry food with wet food. Also, when the owners feast on a treat, the pet gets a treat too," says Linda Teležnikova from PetCity, a full-service pet center operator with 46 retail stores and 16 veterinary clinics in the Baltic countries, whose acquisition by the Musti Group is expected to be completed by the end of 2024.

## Supermarkets vs specialized channels

As a result, more and more accessories, care products, snacks and treats for pets have found their way onto retail shelves. Pet food items that cater to certain dietary requirements or are aimed at addressing specific health issues, such as allergies and digestive problems, are also in greater demand. Major pet food retail and distribution channels in the Baltics include



supermarkets that offer a wide range of dog and cat food from both multinational pet food manufacturers and cheaper private label brands.

Meanwhile, premium products and expensive accessories are more the domain of specialized pet shops and veterinary clinics. Factors influencing the purchasing method include price, quality, shopping convenience and the availability of professional advice about products, according to industry insiders. The final choice ultimately depends on the personal preferences, beliefs and priorities of pet owners.

### Money-saving strategies

Differences in income levels and the availability of veterinary services across Estonia, Lithuania and Latvia influence how much pet owners spend on their pets. High inflation and rising prices, which have affected people's everyday lives in recent years, have made consumers more price sensitive. To cut costs and save money, many of them opt to buy larger quantities of essential pet supplies when there are significant discounts. Nevertheless, they still show a strong commitment to pet welfare and a preference for high-quality products. [▶ SEE NEXT PAGE](#)

### Pet ownership in the Baltics: facts and figures

- The European pet food association FEDIAF estimates the number of pets in the 2 main categories in the Baltics (as of 2022) at 2.4 million: 1.3 million cats and 1.1 million dogs
- While dog ownership is more common in Estonia and Lithuania, in Latvia cat ownership is more prevalent among households having a pet
- In all 3 countries (which have a total of around 6 million inhabitants), pets are most often found in families of 3 or more people
- Data shows that regardless of whether they care for a cat, dog or other pet, owners are increasingly viewing their pets as family members and pampering them



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“Estonia is struggling with high inflation and unprecedented high prices, so dog owners are feeling it in their wallets. But the livelihoods of dog people no longer differ by orders of magnitude from those in Western Europe or the US. Estonian dog owners are spending more and more resources on ensuring their dog’s well-being,” explains Aivar Roop, CEO and founder of the Estonian dog accessories brand Nufnuf.

His company produces and sells its premium pet products to more than 30 countries around the world. In addition, it offers dog daycare and hotel services in Tallinn and operates Estonia’s first indoor pool for dogs.

### Online shopping on the rise

Following the COVID-19 pandemic boost to e-commerce, consumers are purchasing a growing percentage of pet-related goods online. Local players believe that this will continue to increase in the coming years, as it is making high-quality and specialized pet products more accessible to Baltic pet owners.

In Latvia, home delivery means that people are now more often buying canned food and dry food for cats and dogs. Meanwhile, in Estonia and Lithuania, frozen food is also gaining popularity in addition to classic pet meals, according to the technology company Wolt, which is active in all 3 Baltic countries. This home-delivery company joined forces some years ago with PetCity to offer an online platform for consumers, merchants and couriers. This allows pet owners to order food, toys and care products online and get them delivered to their door.

### Sky-high raw materials costs

The growing consumer interest in buying pet products online has also prompted other food retailers and pet industry players to intensify their digital activities. The pandemic already highlighted the importance of digitalized processes and diversification, not least because of the disruption in the global supply chains that created major production and logistics challenges.

***Due to the conflict in Ukraine, Baltic pet companies are no longer able to export to the neighboring markets of Russia and Belarus.***



These have since been exacerbated by Russia’s war in Ukraine and have primarily driven up the costs of raw materials.

“Prices for cereals, meat and other raw materials jumped sky high and the surge had a huge impact on product cost and pricing structures,” says Paulius Ausmanas, Head of Export Development at KIKA Group, the largest manufacturer and retailer of pet care products in the Baltics. “We couldn’t pass everything on to our customers and had to absorb a lot of the cost increases by decreasing our margins.”

### Focus on differentiation

Due to the conflict in Ukraine, Baltic pet companies are no longer able to export to the neighboring markets of Russia and Belarus. Given the small size of their domestic markets, pet care product producers from Estonia, Latvia and Lithuania have turned their attention abroad to mitigate the loss of that sizable portion of their business. Many of them are now increasingly looking to international markets for growth, with significant potential seen in Asia, the US and Scandinavia.

“Competition is tough; the pet industry has become one of the ‘most wanted’ industries nowadays. So, if you want to be in the game you have to be the best – you can’t be average,” Ausmanas states. He adds that the competitive nature of the pet industry necessitates a focus on quality and differentiation.

For Baltic pet care product producers to succeed globally, unique selling propositions (USPs) and high-end products are essential. “We have to be unique and go the extra mile in everything we do,” he adds.

### In search of new markets

KIKA Group, which is based in Lithuania's second biggest city, Kaunas, exports to 65 countries worldwide. It increased its export sales by more than a third in the 12 months up to February 2024. The company is currently preparing for the construction of a new factory to produce wet food in small pouch packages, and also invests in research and development activities.

Over the next 3 years, the branded and private label supplier will invest up to €5 million (\$5.58M) in collaboration projects with Lithuanian and European scientists to develop and validate new formulas and products.

Finding new export markets has also been a huge challenge for the Ukrainian producer of wet and dry food for cats and dogs, Kormotech. It adapted to the war in its home country by relocating some of its activities to Lithuania, where it had been operating an annual 20,000-tonne-capacity plant specializing in wet pet food production in the city of Kėdainiai since 2020. Amid the ongoing war, the company has managed to strengthen its presence in the Baltics, as many supermarket chains have been eager to replace Russian-made goods with Ukrainian ones.

At the end of last year, Kormotech announced plans to expand its manufacturing facility by investing more than €60 million (\$67M). "We consider Lithuania our second home market. While we plan to build new production facilities in Ukraine once the war is over, Lithuania currently serves as our gateway to the world," states Kormotech CEO and co-owner Rostyslav Vovk. The company expects the first new production line in Kėdainiai to become operational in 2025, with another 3 added over the course of the project by 2028.

### A note of optimism

Looking to the future, industry representatives are cautiously optimistic. Despite the pressure of various economic and geopolitical factors, dog and cat owners in the Baltics still seem to be willing to spend on their pets, and they show a rising awareness of proper pet care. This will create new business opportunities in the relatively small markets for both local and global players. However, in view of narrowed profit margins, there is a need for differentiation and ongoing innovation to stay ahead of the competition. ♦

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# Catching up with kit for active dogs

From harnesses to life jackets, explore the latest trends in performance gear specially designed for sporty dogs and their adventurous owners.



**Jen Sotolongo**  
Contributor  
*PETS International*

As dogs become more integrated into their owners' lifestyles, active dog parents are looking for quality pet wear that performs as well as the gear they purchase for themselves. With a growing emphasis on both functionality and style, manufacturers are innovating to meet the needs of active dogs and their humans, from daily walks to intense outdoor adventures.

## Practicalities of pet activewear

The top features owners consider when purchasing active gear for their dogs include functionality, fit and durability so the kit can withstand the elements and demands of the outdoors in the long term.

"Overall, the trend in active dog gear reflects a blend of practicality, safety and style, catering to both the functional needs of outdoor adventures and the aesthetic preferences of dog owners," notes Mason Gwin, Associate Brand Manager for Massachusetts-based dog outdoorwear brand Kurgo.

## Leading brands and their top gear

Best-selling products from the Kurgo brand include the Journey Air harness, pet carriers like the G-Train Carrier Backpack and vests such as the quilted Loft Jacket, all

of which have received high praise among customers for their comfort, durability and quality.

As the popularity of outdoor pursuits like canicross (cross-country running with your dog), and bikejoring and skijoring (sports where dogs pull bikes or skis) grows, activity-specific harnesses have become bestsellers for the Norwegian active pet gear brand Non-stop Dogwear.

In addition to improving its joring harnesses, Non-stop Dogwear has also designed high-performing fall and winter jackets for dogs, like the Fjord Raincoat, Glacier Jacket 2.0 and Glacier Wool Jacket 2.0. A big summer hit for the brand has been its Protector Life Jacket, as paddle boarding with dogs has increased among owners.

## Innovations in design and functionality

Kurgo's new Cascade Harness acts like a daypack for dogs but performs like a harness. It's made from high-quality ripstop fabric with a perforated foam backer plate for ventilation and includes 3 pockets to carry essentials, alongside front and back leash attachments.

Non-stop Dogwear is launching an innovative new product this fall called the Rush Harness, which is shorter so pet parents can have better control of their

dogs. It is focused on the beginner segment, where there is a need for a high-performing technical product that is easy to put on and take off for moderate-pulling dogs.

"We are extremely excited about it, and it will help many dog owners with a busy schedule to be active together with their dogs," says Ole Bondevik, Head of E-Commerce for Non-stop Dogwear.

### Addressing sizing and feel

Fit and comfort can be a challenge for brands that design activewear for dogs simply because canines come in all shapes and sizes.

"Ensuring a harness fits well across different dog breeds and sizes without causing rubbing or chafing is a primary challenge," says Gwin.

Because fit varies widely among dog breed shapes and sizes, both Kurgo and Non-stop Dogwear help retailers and consumers find the best fit for their dogs through videos that demonstrate how to measure their pets so they can choose the most appropriate sizes.

Brands also design harnesses in different ways so understanding the performance intention of the gear will ensure the best fit. For example, Non-stop Dogwear harnesses are designed to provide the dog with unrestricted movement while in use.

To educate buyers, the brand has created an academy with short videos to ensure retailers and employees can quickly and easily learn about the different aspects of its gear.

The Kurgo website also features detailed information about the brand, and size and fit guidelines. Retailers can also contact the in-house sales team directly for more product information.

### Enhancing durability and breathability

Other issues designers face when creating activewear for dogs include the durability and breathability of the gear they manufacture.

"Many customers express concerns about the durability of harnesses, especially for dogs who are

### *Brands design harnesses in different ways so understanding the performance intention of the gear will ensure the best fit.*

active or strong pullers," states Gwin. "Harnesses need to withstand wear and tear over time, including exposure to various weather conditions and rigorous activities."

Kurgo considers this when designing its products and stresses the importance of creating performance gear with optimal breathability and heat management for dogs that wear harnesses for extended periods or in warm weather.

Furthermore, the brand also understands the need to create durable gear with safety, functionality and style in mind.

"Addressing these challenges involves ongoing innovation in materials, design and construction techniques to create harnesses that meet the diverse needs and preferences of dog owners, while ensuring the comfort, safety and well-being of their pets," notes Gwin.

### Using feedback to improve

Non-stop Dogwear looks to customer feedback to continuously improve the fit and comfort of their products.

"We always look for feedback from our community," says Bondevik. "You might notice that many of our products have a 2.0 or 5.0, and that is because we listen to our customers and community and always seek to improve our products – they are never finished."

Active dog wear brands wanting to stay ahead of consumers' ever-changing lifestyles must continually incorporate customer feedback on fit, comfort and performance, and update products to meet those demands.

"Our product process is never done, so we continue innovating and making new products that make it easier for people to be active together with their dogs," Bondevik concludes. ♦



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**IPV PACK: new headquarters and an increasingly international future**

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# Revolutionizing pet food production with texturization technology



**How manufacturers can turn underutilized low-value by-products into high-quality meat-like delights that are great for business and desirable for pets.**



**Pedro Fossat**  
Sales Manager  
DANA-Technology ApS  
[dana-technology.dk](http://dana-technology.dk)

An advanced texturization process could prevent waste and improve profit. This technology uses mechanical rotation and heating to turn emulsified meats into fibrous chunks that mimic the appearance, feel and taste of real meat – maximizing the value of by-products or lower-value cuts and ingredients.

## From by-products to premium products

A major opportunity for pet food manufacturers lies in repurposing materials that would typically be considered waste or used in low-end products – such as machine-separated meat from bones, poultry and fish trimmings, and prime cut-offs, to name a few.

Instead of being used for low-value purposes like flour, oil or biogas production, these materials can now be transformed into high-quality textured protein, unlike traditional chunks.

This is made possible by the Rotary Disc Texturizer (RDT) developed by DANA Technology, a Denmark-based company specializing in pet food machinery.

## Creating meat-like texture

The RDT leverages mechanical rotation and thermal energy to coagulate proteins and carbohydrates, creating a meat-like texture that delivers real meat's bite, chew and elasticity. The result is a product that

maintains the natural appearance pets and their owners find appealing, making it an ideal solution for premium pet food.

Texturization relies on the rapid denaturation and coagulation of proteins within the emulsion. As the RDT applies heat and constant movement, proteins undergo structural changes that, depending on the protein type, occur between 50 and 70°C. This precise process creates a fibrous, meat-like texture, allowing denatured proteins to aggregate and form solid chunks.

## Resource efficiency to enhance sustainability

The RDT provides a practical way to repurpose by-products while promoting sustainability, by reducing the need for prime cuts usually reserved for human consumption. This change helps create a more resource-efficient food production system and gives pet food manufacturers a stronger competitive edge in a challenging market.

Vagn Hansen, CEO of DANA Technology, explains: "Our RDT allows manufacturers to transform by-products into high-quality products that meet the growing demand for sustainability and profitability in the pet food industry – it is a way to increase profit from day one."

As the pet food industry evolves, the RDT is leading its transformation, providing manufacturers with a powerful tool to meet market demands for sustainability, quality and profitability. ♦



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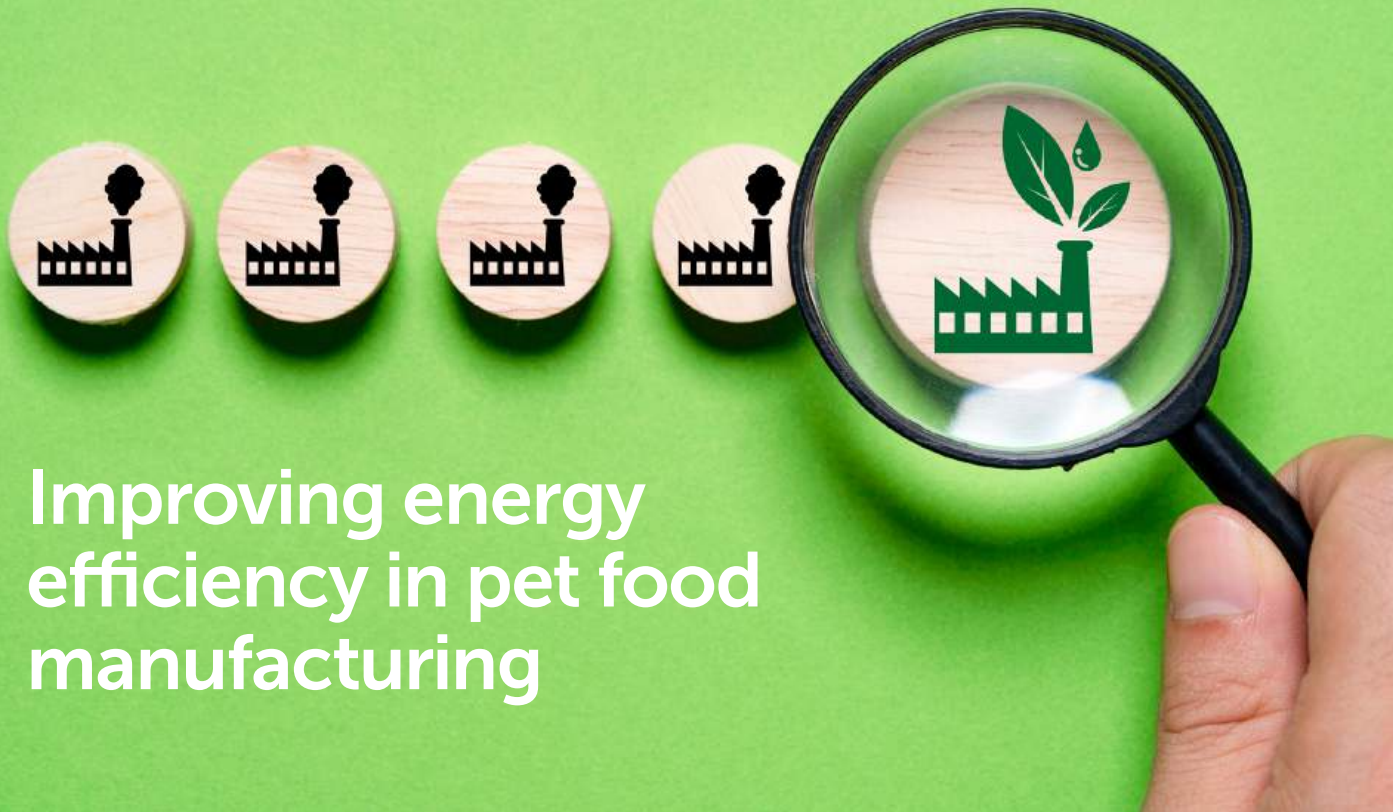
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# Improving energy efficiency in pet food manufacturing

**Production plants have a wide range of solutions at their disposal – old and new – to help them reduce their energy consumption. Which measures are most effective and what areas should they prioritize?**



**Emma Penrod**  
*Contributor*  
*PETS International*

Whether driven by sustainability and corporate social responsibility (CSR) goals or by cost considerations, today's pet food manufacturers are increasingly looking for ways to advance their energy efficiency. We asked a number of processing experts to share insights into the steps that can be taken and the associated gains.

## The attraction of solar panels

When animal health and nutrition company Alltech Serdán installed solar panels at its production plant in Mexico in 2022, the move was not intended to reduce costs or improve energy efficiency. Instead, it was motivated by sustainability and CSR. These themes are baked into the plant's workplace culture because, among other ingredients used in pet food, the company makes a plant-based extract that reduces emissions from livestock waste.

Therefore, installing solar panels to reduce the plant's carbon footprint seemed like a natural fit, according to Marco Sanchez, Maintenance and Projects Manager at Alltech Serdán. But of all the measures the plant has taken to reduce its energy costs in recent years, the solar panels have to date generated more cost savings than all but one other project, says Sanchez, who describes it as "a happy side effect".

However, this does not mean that a pet food company must invest in flashy projects like solar panels or expensive equipment retrofits to make major strides in energy efficiency. Companies can realize significant gains by tweaking key aspects of their existing processes – especially drying and preconditioning, according to Sajid Alavi, a professor specializing in extrusion processing at Kansas State University.

Anders Haubjerg, Process Engineer at equipment manufacturer Wenger, agrees. "Reducing the carbon footprint and decreasing energy consumption in

[▶ SEE NEXT PAGE](#)

extrusion and drying processes is a real goal that we often discuss with customers, as this can have a tangible payback in sustainability that can also lead to improved profitability of operations,” he comments.

### Focus on the dryer

For pet food companies looking to cut back on energy costs, Alavi recommends starting with the dryer. “Drying is a big energy-consuming process, and if we can make drying more efficient, that saves on energy and improves overall sustainability,” he states.

Within the dryer, the first issue to consider is variability in the product’s final moisture content. According to Alavi, manufacturers sometimes set their dryers to compensate for variability in the finished product. For example, if a particular dryer tends to have a 2% margin of error and the goal is a finished product with a 5% moisture content, they may aim to dry to 3% or less to compensate. Alavi explains how reducing dryer variability by even a single percentage point could allow manufacturers to increase their target moisture content from 3% to 4%, which could significantly reduce energy use.

### Smaller adjustments

Updating old heating components, adding heat exchangers and even introducing new alternative fuels can reduce dryer energy consumption by 20-60%, according to Haubjerg, but retrofitting or replacing a dryer can come with significant costs.

But he emphasizes that it’s possible for manufacturers to save energy with smaller tweaks as well and that modifications which recapture energy from the dryer exhaust air, for example, can cut energy use by 10% or more, at a more moderate cost. Subsequently, additional modifications can be made over time in a phased approach to achieve greater gains.

While Haubjerg agrees that the dryer should be the primary area of focus given its relatively high

***Updating heating components, adding heat exchangers and even introducing alternative fuels can reduce dryer energy consumption by 20-60%.***



energy use, he recommends that manufacturers also consider the extruder technology they have in place as extruders can have different requirements when it comes to the kind of energy they use. He suggests that manufacturers may want to consider options that not only maximize energy efficiency, but also offer a greater range of flexibility with respect to fuel choices in the future.

Installing solar panels and an economizer on the boiler at the Alltech Serdán plant have cut costs by some 30% in recent years. However, Sanchez points out that the biggest cost savings have come from the decision to switch from using liquefied petroleum gas to compressed natural gas as the primary source of fuel.

### How to avoid losing steam

Companies that have already begun work to optimize dryer efficiency should consider the use of steam in their preconditioner as a logical next step, according to Alavi. Like drying, he says, creating steam is an energy-intensive process, and so manufacturers want to be sure that the steam they produce is applied evenly to the target ingredients with minimal loss of steam to the environment.

Current solutions to steam loss in the preconditioning process focus on designing systems to give the steam more opportunity to condense and ensure that ingredients are evenly exposed to the vapor. But there is also emerging research – including studies in the works by Alavi’s team – exploring cutting-edge

technologies to capture and recirculate steam that would otherwise be lost.

### Ingredient selection

Another frontier for companies looking to take energy efficiency to the next level is ingredient selection, says Alavi. Some materials – corn or rice, for example – may better absorb steam in preconditioning than others. This of course would have to be balanced with cost and ingredient availability and so the impact of ingredient selection may vary from one plant to the next. Alavi confirms this is another current area of research at Kansas State University.

And then there are options like solar panels and other forms of renewable energy. While Alltech Serdán's installation currently generates about 46% of the electricity it uses, the plant has set a goal to expand its solar farm and eventually supply 100% of its own electricity, according to Sanchez.

*Companies can realize significant gains by tweaking key aspects of their existing processes – especially drying and preconditioning.*

### Financial incentives

Alavi notes that these kinds of projects may be particularly attractive to plants that may be eligible for government tax rebates or other incentives for solar panels or renewable energy projects, but they may not be the only way to qualify. Companies may also qualify for certain energy use incentives if they have data on hand to show how their operations have or could be improved, he says.

"If you can show that one process is more energy efficient than the other, I think it's worthwhile [collecting data] for anything that might give you some support. If you're buying new equipment, a little help would go a long way," he concludes. ♦



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SYMACH THE NETHERLANDS

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The company's global presence, as a part of BW Packaging, is strengthened by a dedicated sales and support team. SYMACH's international network of agents and partners ensures that customers receive the highest quality of service, regardless of location. This global reach, combined with a local approach, allows SYMACH to respond swiftly to customer needs and market demands.

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# Batch-driven optimization streamlines costs in pet food manufacturing

How pet food producers can reduce variation and lower costs with real-time inventory data.



**Filip Snauwaert**  
*Solution Architect*  
*BESTMIX Software Nutrition*  
*bestmix.com*

Managing the complexities of raw material batches presents a constant challenge for pet food companies. You need to balance content, shelf life, and quality while upholding product standards and complying with production regulations.

## Addressing the challenge

This issue is especially acute in meat-rich wet foods, where raw material availability and prices shift rapidly. Each batch comes with its own unique characteristics and complexities to meet standard formulation requirements.

Traditionally, manufacturers have relied on standard formulations and averages with large safety margins. However, this approach requires constant manual adjustments and monitoring, leading to inflated costs and squeezed profit margins.

## Optimizing by the batch: reducing waste and costs

Software solutions help wet food manufacturers optimize production at the batch level. Rather than relying on averages, it's based on what's actually on their shelves and in their machines.

By continually factoring in the quality, price and batch parameters (like shelf life) of current stock in individual lots and production orders, you can deliver products that precisely meet specifications.

## Consistent quality

What if nutrient values in your raw-material lots show high variability? Optimization software adjusts each production order and proposes a better composition based on the exact inventory on hand. This ensures that the end product maintains consistent quality, meeting both customer expectations and regulatory requirements.

## Adapting to production constraints

Optimization tools also take into account production rules and logistical constraints. By considering factors such as shelf life, production line capacities and stock management priorities like 'first in, first out', manufacturers can eliminate the need for manual interventions that often disrupt production schedules and impact costs.

## Enhanced traceability

With compositions varying by batch, traceability is key. Advanced systems track each optimized order, ensuring producers have a clear record of material lots used, as well as quality and pricing data. This transparency supports both quality control and regulatory compliance efforts.

## Agility and competitiveness

Pet food manufacturers adopting real-time optimization tools are finding that a data-driven approach to batch management can significantly reduce costs, increase efficiency and enhance product quality in an ever-changing market. And with constantly fluctuating raw material prices and quality, batch optimization allows manufacturers to stay agile and maintain a competitive edge while keeping costs in check. ♦



# A retail perspective on orthopedic pet beds

## How are major chains in the UK and North America helping to ensure that pets get a comfortable and healthy night's sleep?



**Muskaan Gupta**  
Associate News Editor  
GlobalPETS

The growing focus on pet health and comfort is driving increased demand for orthopedic beds that are specially designed to provide the necessary support for pets. As a result, the market is evolving rapidly, with options ranging from memory foam and egg-crate foam to gel-infused beds. PETS International asked retailers about the category's performance.

### Premium products perform well

UK pet giant Pets at Home carries over 130 lines in its core bedding range, of which over 40% have a supportive foam filling to provide the necessary support and durability. According to the company, like-for-like sales of memory foam beds are up 40% and the pet bedding category "remains resilient".

In addition to the retailer's existing ranges that already include orthopedic beds as part of their assortment, earlier this year Pets at Home launched a new luxury range of bedding called 'Noble'. This features beds with premium fabrics and fillings to cater to the increasing demand for high-end pet products.

As a result of the good performance of these premium products – representing 8% of the company's total sales mix – the retailer launched a new range of cat bedding under the same brand in September.

### Beds for every season

"Seasonal ranges have also performed well, in particular our fun printed mattresses in our summer collection.

We will be launching a Christmas collection under our Wainwright's brand later this year," comments a Pets at Home spokesperson.

Across the pond, US-headquartered Pet Supplies Plus has also witnessed strong performance in the category over the past year. The retailer, with over 720 locations throughout the country, says that orthopedic beds are among the top sellers and sees this as an indication of sustained demand from customers.

"This can be attributed to several factors, including increased awareness of the importance of joint health and comfort for pets, as well as the expansion of orthopedic bed offerings to cater to a wider range of pet sizes and preferences," comments the retailer.

### Deciding factors for consumers

Canada's leading pet retailer Pet Valu agrees that orthopedic beds play a role in joint health: "They are great for senior pets but can also aid in promoting healthy joints and improve mobility, making them good for puppies and kittens to help reduce issues as they age."

The Ontario-based firm has its own Bailey & Bella brand of orthopedic beds that evenly distribute the pet's weight to relieve pressure on hips and joints.

However, besides the health and comfort of their pets, practicality is also on consumers' minds, according to Pets at Home. The retailer believes that the machine washability of its beds is an additional consideration in purchasing decisions. ♦

Schulze GERMANY

## Schulze Heimtierbedarf celebrates its 40th anniversary

Founded with a passion for pets, the family business Schulze has grown into a global leader in innovative, eco-friendly pet products with a focus on quality.



While on a sailing trip in the early 1980s, Reinhard and Marlies Schulze struggled to find quality food for their dog – a boxer. This gave them the idea to create their own pet food brand.

### Global presence

What began 40 years ago at a kitchen table, with a garage workspace and the family car for deliveries, has grown into a globally recognized company. Today, Schulze's products are distributed across Europe and have even entered the Chinese market. The company is now led by the second generation, Dirk Schulze, supported by CEO Jesper Bach Sørensen since 2021.

### In-house products plus European distribution

Schulze offers a diverse range of innovative products, all developed in-house. The company aims to stay ahead of trends by offering the best equipment and cutting-edge formulas with unique ingredients – while always ensuring a balanced and complete diet for dogs and

cats. Its motto: "Feed healthily instead of just feeding until full" reflects this commitment.

A standout product is the super-premium brand, PORTA21, which has gained widespread popularity among pet owners and retailers throughout Europe, earning consistent 5-star reviews on online platforms. The brand is known for its strong tradition, quality and focus on pet health.

In addition to creating its own products, Schulze is the exclusive European distributor for a number of top US brands. These include STARMARK, which specializes in training, activation and durable dog toys, and PIONEER PET, known for its innovative drinking fountains.

### Sustainability throughout

Schulze Heimtierbedarf is known for its pioneering approach to eco-friendly products, such as the patented SOFT CAT line of environmentally friendly cat litter. Made from grass and corn fibers, and produced using green energy, the range

has been extended this year with SoftCat Yucca, which offers the same ecological benefits.

The company prioritizes the issue of waste reduction, with a long-term plan to make packaging sustainable and recyclable as well as low waste. This strategy should take it further along the path to reducing its carbon footprint.

### Enhanced retail services

Since August 2023, Schulze has focused on enhancing services for distributors and retail partners by creating an exclusive B2B portal. This portal provides convenience, fast access to products and special deals. To celebrate its anniversary this year, Schulze has introduced attractive offers and products to bring in new customers. Schulze products are available in pet specialty stores throughout Europe – whether you're a local resident or visiting from elsewhere. ♦

**Schulze Heimtierbedarf GmbH**  
[schulzeheimtierbedarf.de](https://schulzeheimtierbedarf.de)

# US pet parents remain loyal to their brands

Despite concern about the money in their wallets, the majority of American consumers aren't willing to make concessions when it comes to buying products and services for their pets.







**Zack Pych**  
PwC Strategy&



**Erin Brooks**  
PwC Strategy&

While the broader consumer market in the US faces trade-down pressure as consumers react to the rising cost of living, the pet industry stands out for its resilience. Surveys indicate that the bond between pets and their owners is key to this.

### Loyalty drives pet consumer commitment

The strong customer loyalty seen in pet categories is providing insulation from the significant trading down found in other consumer categories.

PricewaterhouseCoopers (PwC) proprietary credit card data indicates that pet services – including grooming, walking, boarding and training – have continued to grow, with a 3% year-over-year (YoY) increase in spending. But pet product purchases, on food or toys for example, have declined by 3% YoY, pointing to some price sensitivity.

The resilience of the sector overall is also noticeable in pet parents' continuing brand loyalty, with 57% of them

considering themselves "loyal" or "very loyal" to their pet service provider. More than half (56%) of the 1,000 pet owners in a PwC survey undertaken in March this year of 4,000 consumers feel a connection to their pet product brands, and this reduces the risk of significant trading down.

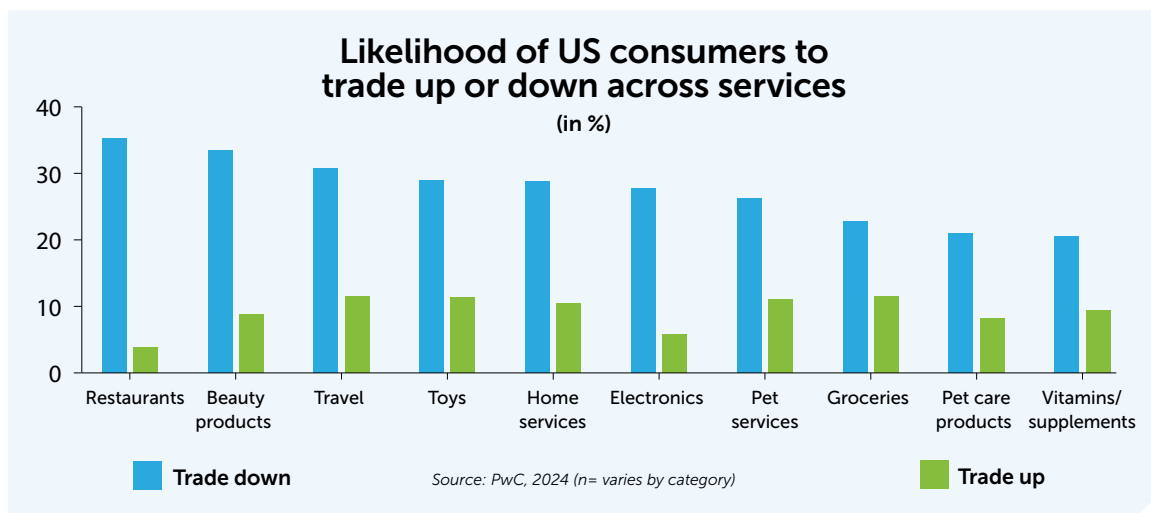
### Less likely to trade down

US consumers indicate a lower likelihood to trade down in both pet products and services when compared with other categories. This is the lowest for consumers using pet services compared with all other service categories, and the third lowest for pet products among all product categories, trailing only groceries and vitamins.

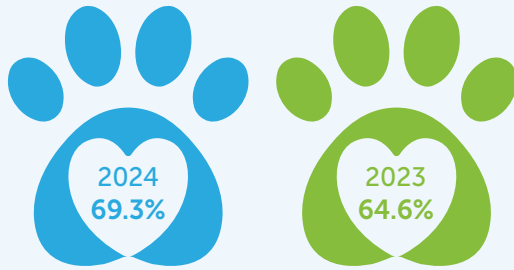
*The strong customer loyalty seen in pet categories is providing insulation from the trading down found in other consumer categories.*

Nevertheless, price remains a critical factor for those considering switching brands, particularly among pet products. Although the majority of consumers (68%) expect not to switch brands, of those that do plan to switch, price is an overwhelming factor, with around 5 out of 10 respondents noting it as a primary reason.

▶ SEE NEXT PAGE



## Likelihood of US consumers to not adopt a pet



Source: PwC, 2024 (n= 4,004)

### Vet prices don't deter pet parents

Price pressure is not just evident in pet products but has also been experienced by the consumer with regard to vet services. According to the PwC survey, 70% of pet parents visited a vet in the past year. More than 9 out of 10 of them believe there had been price increases compared to the previous year.

PwC analysis confirms that vets have raised their prices by an average of around 10% over the past year alone. However, high pricing is unlikely to deter pet parents from getting the care they need for their pets, as 62% of pet owners state that they would be willing to go through financial hardship for their pet's care.

Pet insurance appears to be well positioned to benefit from the rising costs of vet services, the overall pressure on the consumer wallet and the importance of pets to their owners. Currently, only 12% of US consumers surveyed have pet insurance, but 19% plan to purchase it in the near future.

Millennials and Gen Z are the most likely to buy pet insurance (35% of Gen Z and 30% of millennials). This creates significant tailwinds for the industry, as younger generations are also much more likely with adopt a pet in the next 6 months (31%) compared to older generations (12%). ♦

**62% of pet owners surveyed state that they would be willing to go through financial hardship for their pet's care.**

### Pet ownership returning to pre-pandemic levels

According to the 2024 Dog and Cat Report published by the American Pet Products Association (APPA), pet ownership in the US has stabilized after the pandemic surge. It is believed that 82 million US households (63%) own a pet. In 2010, 62% of US households had at least 1 pet, some 73 million homes. Between 2014 and 2018, pet ownership had risen to the higher levels of 65-68%, and this peaked during the pandemic year of 2020, with 7 out of 10 US households owning a pet.

PwC forecasts another 2-3 years for pet adoption growth to return to pre-pandemic rates, as consumer hesitancy to adopt new pets persists. The recent survey suggests that 70% of consumers are unlikely to adopt a new pet in the next 6 months, while 11% are considering giving up a pet.

Interestingly, while Gen Z and millennials appear to be the most likely to adopt a new pet, they are also the most likely to give up a pet in the near future. Those who live in an urban area are significantly more likely to give up a pet in the next 6 months, with 18% of urban respondents considering doing so.

Consumer-reported unwillingness to adopt new pets remains at a high level, even as more time has passed since the pandemic, further indicating that the category will require additional time for full recovery.



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## SIGNATURE INGREDIENT **The Green Tripe**

### 1<sup>st</sup> Chamber - Rumen

Comprising 80% of the whole stomach, the least expensive and least desirable.

### 2<sup>nd</sup> Chamber - Reticulum

Barely chewed food is slightly broken down in the rumen and reticulum and then sent back to the mouth.

### 3<sup>rd</sup> Chamber - Omasum

Food then passes through the reticulum and omasum and into the abomasum.

### 4<sup>th</sup> Chamber - **Abomasum**

Food is further broken down by gastric juices, amino acids and digestive enzymes.

**NUTRIPE** uses only Abomasum.



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