

How to do lean right • Increasing profits with better moisture control

April 2006

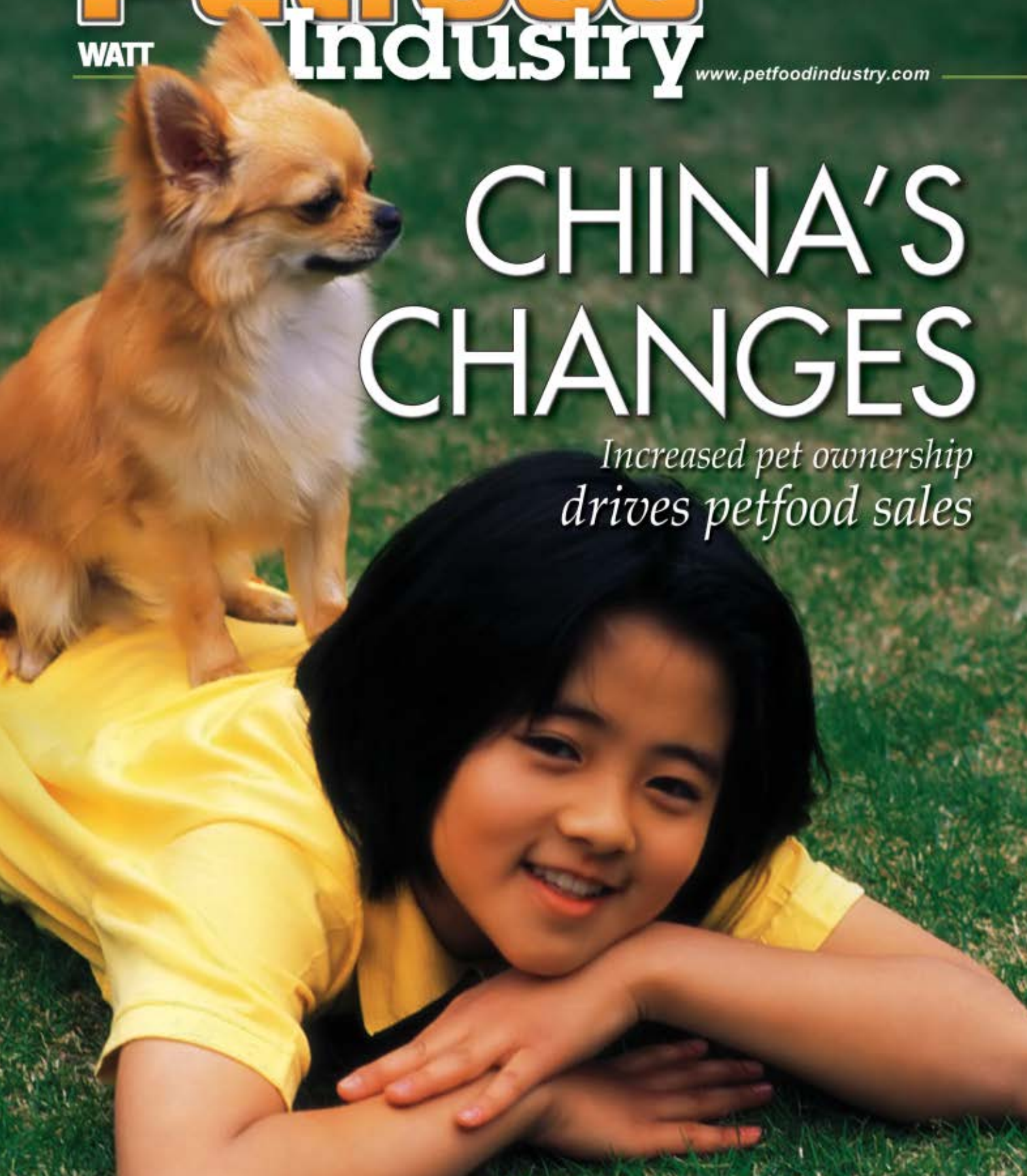
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Feeding hungry pets

New MOWAA initiative helps senior citizens

Recently, I was looking through a copy of *Ladies Home Journal* and came across an article describing the plight of senior citizens in the USA who go hungry because they are sharing what little food they do have with their pets. The article explained that when Meals On Wheels Association of America (MOWAA; an organization that delivers daily meals to hungry senior citizens) workers noticed that the empty plates being returned from seniors were being licked clean, they decided to create a program for the hungry pets too.

MOWAA initially began collecting damaged or outdated bags of petfood from area animal shelters, but the more than 1,000 pounds they distributed monthly didn't even begin to cover the needs of so many hungry pets.

Feeding pets

According to the article I read, the Sacramento, California, USA area MOW program manager received a call from Royal Canin, which offered to donate 65,000 pounds of food—enough to meet MOW's needs for a year, not only in Sacramento, but in several neighboring counties as well. After reading this heart-breaking story, it occurred to me that there must be other petfood manufacturers who would be interested in donating food, money, supplies, etc. to such a worthwhile program.

Across the US, it is estimated

There must be other petfood manufacturers interested in donating to such a worthwhile program. — J. Kvamme



that 20% of MOW's 4,500 branches now run similar petfood programs. The article quoted Enid Borden, the organizations' CEO, as saying: "Someday we'd like all of our programs to be able to do this. It's our job to provide nourishment to the household, and pets are often part of that."

Donations needed

A new initiative from MOW called "We All Love Our Pets" (WALOP) unites and educates the Meals On Wheels programs across the country that are planning petfood programs for senior clients. While many MOW programs have their own petfood services, this is the first initiative of its kind on a national level.

The goal of the WALOP program is to provide support and materials to those Meals On Wheels programs nationwide that support the needs of their clients and their pets by providing supplemental petfood.

Part of this support is a scholarship program, which will distribute funds to Meals On Wheels programs that wish to start or improve a petfood delivery program.

If your company would like to donate to this fund, WALOP should be designated on your donation form. If you are sending a donation via check, please indicate WALOP on your check. For more information on donating to the MOW program, go to www.mowaa.org and click on the "How to Donate" area at the top of the website, or contact the Meals On Wheels Association of America, 203 S. Union Street, Alexandria, Virginia 22314 USA, Tel: +1.703.548.5558, Fax: +1.703.548.8024. ➔

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Getting lean right

BY JAMIE FLINCHBAUGH

10 factors to understand before going lean

Today, we are bombarded with information about lean—what it is and about what lean tools can do. Still, there is very little practical information on how to implement lean transformation and lead the change. Every company's lean journey starts under different circumstances, so there can be no one recipe, no "right way." But, to ensure success, there are many factors to consider before embarking on your lean journey.

Why is it that such a low percentage of companies that know about lean turn it into a success? It's not because they haven't heard about continuous flow, or they don't know how to do the 5Ss or they've never seen a kaizen workshop. It is because the leadership, cultural, organizational and implementation challenges are much greater than they anticipate.

Someone, to whom I would give credit if I could, said wisely, "experience is not what you've been through; it's what you take from it." The fundamental message is that every success and failure should yield as much learning as you can wring from it. Focusing at all times on what makes lean transformations successful, we've compiled the following top ten lessons.

1 Rome wasn't built in a day.

And neither will be your lean transformation. Lean is not a one- or two-quarter commitment. It takes one to two years to build the necessary momentum, and from there your journey will last forever. Yes, tools such

as kaizens can provide very quick and significant improvement. But, without taking the time to implement a program that yields sustainable benefits, process improvements gained by lean tools will slowly deteriorate back to where you started. Significant and sustainable results will occur throughout the entire process, but the most profitable returns are realized through a 2-5 year plan.

2 Lean transformation is not a part-time job.

Don't expect someone to lead the lean charge in his/her spare time. You need to assign a dedicated leader or team to take on this challenge. It requires daily attention from leaders who fully understand the scope of the project and who won't get caught up in today's distractions. Most cultures are centered around solving today's problem, reacting faster and better and getting results today or tomorrow. Stuck in that culture, it is hard for leaders to consider a multi-year journey—people need to be extracted to focus on a different timeline. In addition, these leaders require continued support from management throughout the implementation. You don't have to start big, but make the commitment—it will pay dividends

3 Lean is more than just tools

Lean is not born from what you see, it is born from how you think. Lean is a set of rules and principles, not just tools. Tools focus on physical system changes, but that is not where the heart of lean beats. The entire way of thinking must become embedded in every person of your organization.

Roadmap to lean SUCCESS

An essential element of a lean roadmap understands the phases a company may transition through from the time they start their lean journey to the time they have a sustainable momentum built. Through our experience, we have developed the following simple, effective and realistic roadmap based on 5 key phases.

› Exploration

The first phase, or Phase 0, is Exploration. Many companies go through this, but you wouldn't purposely plan it in. This is the phase where the company is exploring what lean is and what it means for them. A company may even try a few kaizens or even start some kanban cards or 5S tools. This is the phase before a company makes a true commitment to lean. While you wouldn't purposely flounder in this phase for months or years as many companies do, it is part of the roadmap to help companies identify when this is where they are.

› Building the Foundation

The next phase, or Phase 1, is Building the Foundation. This phase is essentially about learning and can last for months or even a couple years. It is important to build a strong foundation of understanding, knowledge, know-how and wisdom about the lean journey. If you start your lean journey by trying to tackle your most critical, life-or-death issue, you will likely revert to your old skills and knowledge. This learning is not all in the classroom—far from it. Much of it must be learned by going out to your processes and trying this. The major distinction here, however, is that your primary purpose of these improvement efforts is to learn, with improved results just secondary.

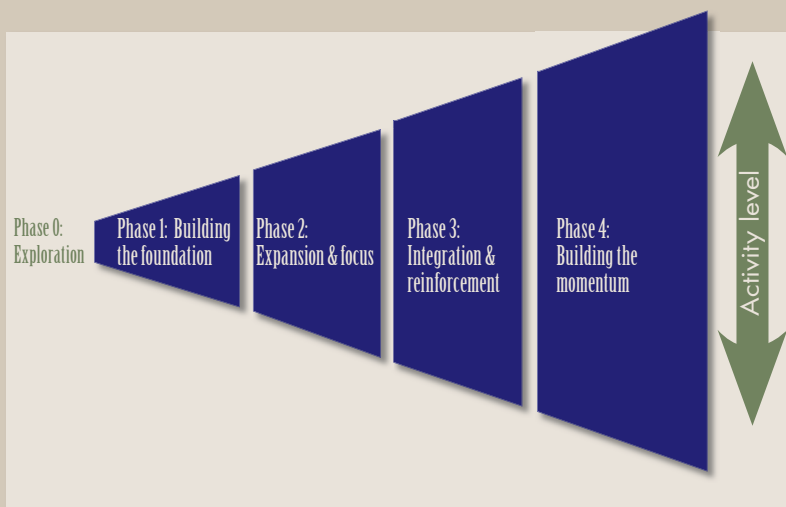
› Expansion and Focus

Phase 2 is Expansion and Focus. In this phase you expand beyond your initial learning efforts into a broader base of the company. You also begin to focus your efforts and your purpose towards gaining results. You will not cover every base or solve every problem, but you will begin to see significant gains. During this phase, just as the last, significant leadership

and guidance will still be needed. Those prepared to lead will still be in the minority and the culture will be changing but not yet shifted.

› Integration and Reinforcement

Phase 3 is Integration and Reinforcement. In the initial phases, lean is still considered its own initiative. During this phase, lean becomes part of the way you do business; it becomes integrated into everything you do. It begins with employee orientation and affects every corner from annual planning, performance review, sales strategies



and even board meetings. Rules, principles, tools and methods are reinforced so that each individual is now exposed and at some level of skill. Lean is now part of how you do things.

› Reinforcement and Momentum

Phase 4 is the phase that never ends. At this point, lean isn't even a word. It just "is." At this point, lean is integrated into your language, your customers, your suppliers and your investors. It would be harder to stop your lean efforts than just let them continue to roll.

There is no recipe, no one right perfect way that fits all scenarios. But there is a roadmap. Use this roadmap to help understand where you are, where you want to go and a few options to get there.

You may fix one problem or process with a lean tool today, but if the old thinking continues, it will recreate the old problems. Only new principles or beliefs change behaviors, not systems or tools. Sustainable lean change—the kind that builds momentum—comes from the mind and heart of all employees.

4 Lean is a journey that never ends.

There is a tendency for companies to declare “we’ve done it. We’ve achieved lean.” The truth is, lean is a constant, never-ending process. You will always strive to be lean, but you will never get there, because there is always a gap between where you are and your ideal state. If you believe that your journey has ended, you’ve failed. Even when you can consider yourself a success, do not stop. Success is an organization that continues to move forward at such a pace that it would be difficult to even try to slow it down.

5 Be prepared for resistance.

When change is proposed, people often feel threatened. Some will think it’s because there has been something wrong with what they were doing, but most will just be uncomfortable with the unknown. So, as your company embarks on this journey, you must work to help people understand why, what and how. Remove the fears—or make NOT moving forward the more fearful choice. Also, many people think lean means cutting staff, when in reality it’s about working smarter to preserve heads and even grow the workforce through market growth.

6 You need leaders to take on this challenge—not managers.

Managing is maintaining current reality. Leadership is moving people towards the ideal state. And you can’t lead people to where they already

are. Lean transformation is about leadership. And leadership is not a position or rank. Look for people at every level of the enterprise capable of this. If lean is about transforming thinking, then in order to lead lean, you must be able to teach.

7 Be prepared for the investment.

People will need to learn new skills and they will need the time to gain them. This means experimenting with every process everyday to get it right. There is also a financial investment—mostly in training, but also in process changes. However, the evidence is clear that the payback for this period is in months and not years. You can use focused improvement tools such as kaizens to get immediate gains and pay for your investment. The potential of difference between lean and non-lean companies is not 5-10%, it is 100-1000% differences in quality, cost, delivery and, of course, profit.

8 Lean is not just about the shop floor.

Taiichi Ohno, one of the fathers of the Toyota Production System, said decades ago that “the Toyota Production System is not just a production system.” If you reduced your lead time in manufacturing by 90% and can get product out in hours, but order entry takes four weeks, then you aren’t really moving forward in the market. You must attack every corner of the business from accounting to human resources to manufacturing.

9 There is no recipe, but there is a roadmap.

A recipe tells you exactly how to do something—the amounts, sequence and timing. There is no such recipe for lean success since every company starts with a different

set of ingredients (or factors and constraints). However, there is a roadmap. There are guide posts along the way that help you determine where you are and offer potential solutions to help you get to where you want to go. Learn from as many other journeys as possible to help understand the roadmap.

10 Don’t just copy the answers.

Many people have tried to succeed at lean in the past by copying the solutions that Toyota or others have found, either through benchmarking or out of a book. The problem is, this is like a kid copying off someone else’s test only to find out they were taking a different exam. Your company is unique and will likely have some unique problems and constraints—you must engrain lean thinking in your organization so you can find your own answers.

Never stop collecting the lessons you learn along your path to lean. Lean transformation is a long journey that will require you to collect experiences and reflect upon each and every lesson you learn along the way.

Mr. Flinchbaugh is a founder and partner of the Lean Learning Center. He is a graduate fellow of the highly-regarded Leaders for Manufacturing Program at the MIT, where he received an MBA from the Sloan School of Management and a Master’s of Engineering degree. Flinchbaugh is co-author of The Hitchhiker’s Guide to Lean: Lessons from the Road. Andy Carlino is the co-author. This book reveals the most critical lessons learned over the authors’ combined 30-plus years of exploring lean highways. It shares concepts and stories based on real-world applications. For more information, visit www.hitchhikersguidetolean.com. Mr. Flinchbaugh can be reached at Jamie@LeanLearningCenter.com.

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Better DRYING

Improved moisture control increases profitability.

BY JOHN ROBINSON AND ROGER DOUGLAS

When it comes to petfood production, manufacturers know that time is money. The time spent removing moisture from the finished product is time wasted waiting to produce the next run. To minimize dryer time and prevent wasted energy that could be used more efficiently, moisture control becomes an important consideration.

This article will explain the differences seen in a petfood dryer operating under its “current control” versus an “improved” moisture control situation. As seen in Figure 1, the “before” and “after” moisture content (MC) variation curves for petfood exiting a dryer operating under current and improved MC control are demonstrated. The difference in moisture variation between the two curves is primarily a function of the dead time (time for a disturbance entering the dryer to be detected) for the respective control systems.

The dead time for current control, where the moisture sensor is located at the exit or beyond the dryer, is at its maximum. In comparison, the dead time for improved control, where the moisture

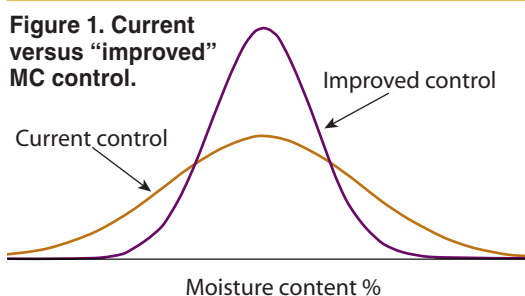


Figure 1. Current versus “improved” MC control.

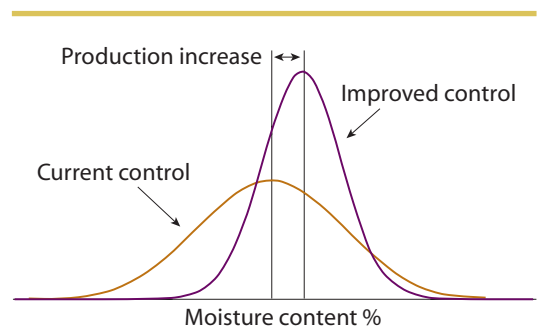


Figure 2. Current versus “improved” MC control under new selection criteria.

sensor is inside the dryer and closer to the dryer inlet, may range from 35-45% less than that for current control. Since the moisture variation is directly proportional to the dead time, the moisture variation reduction is also approximately 35-45%. Because of its wider variation, the current control dryer must be operated with a significantly lower mean MC to prevent the production of wet product. The consequence of such operation is lower production, higher unit energy costs and poorer quality.

Since moisture variation of petfood exiting the dryer is directly proportional to the dead time, the most effective method for reducing the dead time is to place the moisture sensor inside the dryer.

“Improved” control

Looking at Figure 2, we see the same distributions as in Figure 1; however, the position of the improved curve is shifted to demonstrate the advantages of using a MC control system

Choose the correct answer:

- A. Spot is contemplating the nutritional value of this treat.
- B. Spot knows this treat has protective antioxidants that keep it tasting fresh and flavorful.
- C. Spot wants 10 more treats just like it.



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chosen under a new set of selection criteria. Because of its reduced MC variation (narrowed curve), the curve for improved control in Figure 2 may be shifted to the right until its + 3 standard deviation point coincides with the + 3 standard deviation point on the current control curve.

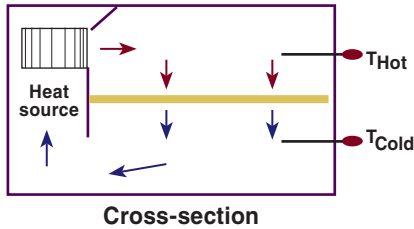


Figure 3. Cross-section of a conveyor dryer showing the Delta T measurement.

The difference between the means of the two curves is proportional to the benefits derived from improved control: Increased production; a reduction in unit energy consumption; and the elimination of over- and under-dried product. Additionally, the difference in the two means may be used to estimate the increase in MC that may be left in the product without exceeding the upper limit for MC. Improved control usually reduces the standard deviation from 35% to 45%, which allows the mean of the exiting moisture values to be increased about 0.5-1%.

Current MC control system

The main purpose of a MC control system is to keep the exiting product sample values within the specification limits with the lowest variation possible, so that the mean value will be maximized without exceeding the upper specification limit. Limitations inherent in conventional MC sensors require that they be installed at the dryer exit or beyond, thus dictating open- or closed-loop feedback moisture control systems.

Such “after-the-fact” control systems produce wide MC distribution curves as shown in Figures 1 and 2. Factors that negatively affect current MC control systems are addressed later in this article.

MC control selection criteria

As previously stated, the MC variation (standard deviation) of a product exiting a dryer is directly proportional to the time it takes for a change in water load to be detected (dead time); therefore, the location of the MC sensor with respect to the dryer is probably the most important factor influencing MC control. Since lower dead time equates to improvement in the bottom line, the ideal location for the MC sensor is inside the dryer.

Present practice is to continuously sense “after-the-fact” MC at the dryer exit, or to periodically take samples for laboratory analysis. This type of sampling necessitates use of a feedback control system. Since such systems make only one correct control decision out of three attempts, they are extremely ineffective in tightly controlling moisture variation.

Conventional MC sensors require frequent, costly calibrations for just about every product dried. If installed, they are usually relegated to measuring trends in MC rather than

frequently sampled for statistical significance and include the entire bed depth. Thus, another criterion for selecting an effective MC control system is to include a sensor that uses a statistically-significant sample.

Some manufacturers use exhaust temperature as a surrogate for product MC. This correlation holds as long as there are no water load changes entering the dryer. However, such changes are inevitable, and the operator must continually search in an “after-the-fact” manner for a new set point that will produce the target MC. Needless to say, selecting an effective MC control system should include the selection of a sensor that correlates strongly with MC under varying operating conditions.

MC sensor calibration is a major factor to be considered when selecting a MC control system. Frequent calibration and the need for custom calibration for all products require the selection of a MC sensor that is universally applicable to each dryer type and most products. To reduce costs and MC variation, select a sensor

The most effective method for reducing the dead time is to place the moisture sensor inside the dryer.

as closed-loop MC control systems. Some serve as open-loop MC control systems that require step changes in the manipulated variable to be made by the operator in response to “after-the-fact” MC data. Therefore, a criterion for selecting an effective MC system is to select a sensor requiring no calibration.

Conventional MC sensors sense a relatively small spot on the surface of the product, thus neglecting the effect of vertical MC gradients. It is important that the sample be sufficiently large,

that will effectively operate in any environment on any product or dryer type. For a MC control system to be effective and accepted by the operators, it must be based on a MC sensor that is simple, rugged, reliable and one which requires minimum maintenance.

The control solution

The “Delta T” MC control system presently meets the recommended selection criteria for an effective control system for petfood. It has been proven to control various products from most

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dryer types. It is based on the patented predictive model seen below:

$$MC = K_1 (\Delta T)^p - K_2/S^q$$

This equation relates the moisture content (MC) of the petfood leaving the dryer to the temperature drop (Delta T = ΔT) of hot air after contact with the wet product and the dryer production rate or speed (S).

Figure 3 illustrates the manner in which the improved control system

that increases the heat input. If the temperature drop is lower than the set point value, the heat input is reduced. Any change in water load entering with the feed will be detected and corrected before it leaves the dryer. This predictive model-based MC control system is automatically engaged by a “cruise control” method that requires no learning time or tedious and costly calibration.

increased, without exceeding the upper specification limit.

As control is improved, the improved control system continually calculates the MC standard deviation and moves the mean (see dashed line shifting upward) MC value upward, always keeping it three standard deviations below the upper specification limit to ensure that the maximum amount of water is left in the product.

Criteria overview

As demonstrated in this article, the recommended selection criteria for a MC control system:

- Includes a MC sensor that operates inside a dryer to reduce dead time;
- Has a large sample size, including the effect of bed depth MC gradient;
- Includes a MC sensor that is simple to operate, rugged and reliable;
- Has model-predictive control needing no calibration or learning time;
- Is universally applicable;
- Utilizes “cruise control” operation to make it more user friendly; and
- Uses statistical methods to maximize water content of exiting product from 0.5-1.0% without exceeding the upper MC specification limits.

It is our view that due to the reduction in moisture content variation, the improved MC system will pay back the investment in less than one year. ➔

Mr. Robinson is president of Drying Technology, Inc. Mr. Douglas is director of Engineering at Drying Technology, Inc. They can be reached at +1.409.385.6422, E-mail: john@moisturecontrols.com, Website: www.moisturecontrols.com.

Improved control allows moisture increase

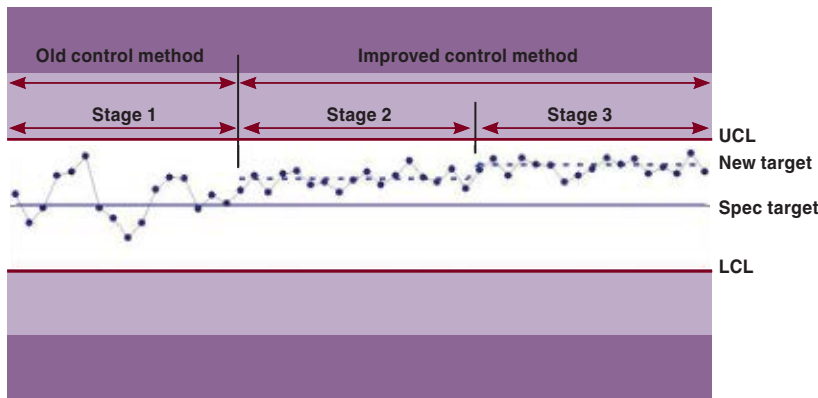


Figure 4. Mean MC continually increased by better control leaves more water in product.

senses the MC inside a single- or multiple-pass conveyor dryer, or a vertical dryer using temperature sensors. After the hot air supply to the dryer contacts the wet product, the temperature drop of the air is used by the above model to predict the exiting product MC.

As the petfood passes the temperature sensors, if the temperature drop is higher than the set point value, the controller uses the Delta T value to calculate an output signal

Figure 4 shows the advantage of the “improved” moisture control system in continually forcing the mean value of the exiting petfood MC upward toward an operating value that is always +3 standard deviations below the upper MC specification limit (UCL). The installation of the improved control method reduces the wider variation (higher standard deviation) produced by the current control (left side of curve) and allows the mean value of the MC to be



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**PETFOOD
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Pet ownership in China is on the increase and attitudes towards pets are changing, with Chinese people demonstrating greater love and care towards their pets, according to the latest report from Euromonitor International. China's fast-paced economy and increasing levels of disposable incomes are having a positive impact on the pet industry. New research shows that pet ownership in China substantially increased between 1999 and 2005.

Driven by the growing population of pets, demand for petfood products has also been stimulated to a large extent. Although small in scale when compared with Western developed countries, the Chinese petfood market offers high growth potential as it becomes increasingly regulated.

Growth of petfood

Owing to the Government's relaxed control in the breeding of cats and dogs, dog and cat ownership grew rapidly between 1999

BY JACQUELINE ZHUANG

Changing attitudes

Pet ownership **drives petfood sales** in China

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and 2005. Euromonitor's latest research shows that the percentage of the Chinese population owning dogs and cats increased from 5% and 14%, respectively, in 1999 to an estimated 7% and 15% in 2004—which indicates the increasing popularity of dogs and cats in China.

Hence, estimated sales of dog and cat food reached nearly US\$216.9 million in 2005, representing current value growth of 12% over the previous year. Sales of other petfood such as bird food and fish food were valued at US\$0.4 million in 2005, up by 8% in current terms from 2004.

Market insight

China's pet population has grown by a remarkable 21.6% in five years, from 240,799,000 in 1999 to 307,116,000 in 2005. The dog population has risen 5% from 24,884,000 in 2004 to 26,153,000 in 2005; while the cat population in China has gone from 56,761,000 to 58,180,100 in the same time period. The first contributing factor is associated with one-child households and a growing aging population. Smaller family sizes have helped to create a greater demand for pets—which are seen not just as animals, but as true extensions of the family. In this context, the family pet is seen as a companion to the child and then, when the child grows up and leaves home, a source of comfort to the parents.

Secondly, a change in perception is taking place, with pets increasingly being seen as companions—particularly for many urban dwellers, who, with their higher levels of disposable incomes, are willing to spend more on their pets. Third, as Chinese society is going through an unprecedented transformation, interpersonal relationships have become more complicated than ever. As a result, many people now depend on their pets to relieve stress and loneliness. Lastly, research shows that for many young adults, keeping a pet also stands as a fashion and identity statement.

With the further development of the above factors, Euromonitor forecasts that the pet population will continue to grow strongly between now and 2009—thus creating lucrative sales opportunities for the petfood industry. Sales of petfood are mostly generated in big cities such as Beijing, Shanghai and Guangzhou.

Major players in the market

The US-based food giant Mars dominates the petfood market in China with its two brands, Pedigree and Whiskas, owned by Effem Foods (Beijing) Co Ltd. The company's wide choice of products and high brand awareness among consumers helped it to take the lion's share of 58% of retail value sales of dog and cat food in 2004.

Other petfood products are mainly produced by domestic manufacturers and typically sold in outdoor markets. The absence of dominant national or multi-national players makes petfood products highly fragmented in various regions across China. Owing to the heavy presence of local players, other foreign petfood producers are at a

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disadvantage in terms of price competition. They also have to face restrictions on import and distribution rights, as well as local protectionism. Euromonitor International does not expect this situation to change in the short to medium term, as foreign players are still adopting a wait-and-see strategy and are wary about the local erratic customs regulations.

Through mergers and acquisitions, global players have strengthened their product offerings and beefed up investment in production facilities, thus further reinforcing their competitiveness in the local market. Domestic players are making efforts to improve product quality and vie for sales opportunities in the medium price segment. However, due to low brand awareness, local brands still mainly cater to low-end and mass consumer needs.

Prospects for the market

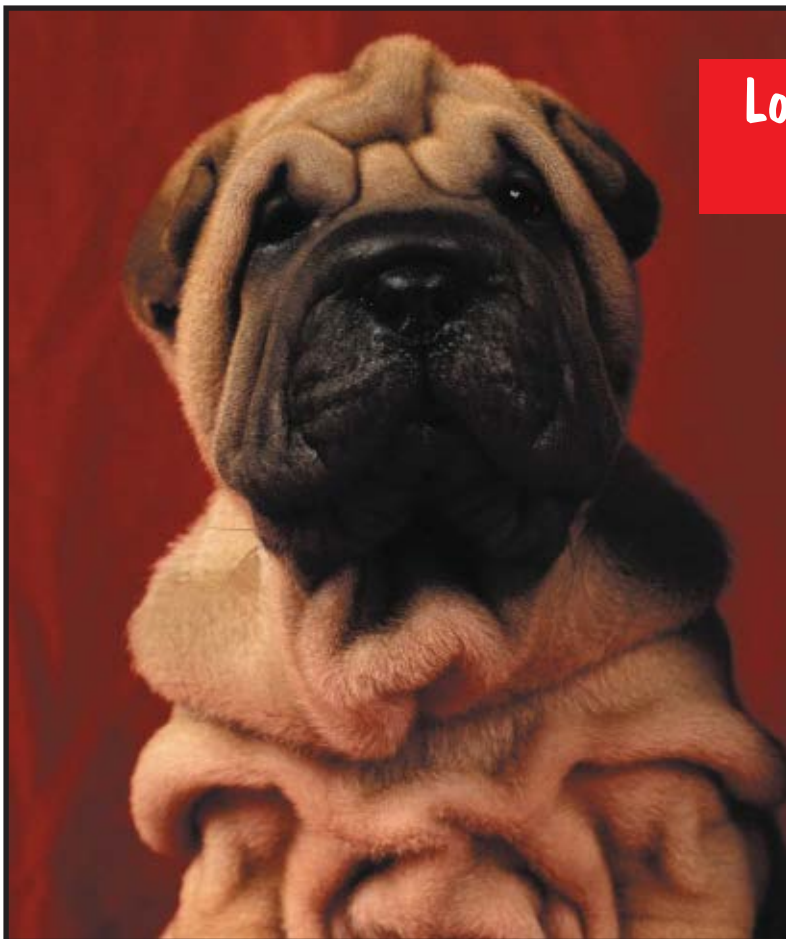
The outlook for the petfood market in China is set to be promising. Sustained economic growth and increasing pet ownership hold the key to continued growth over the next five-year period. Petfood, especially dog and

Sustained economic growth and increasing pet ownership hold the key to continued growth.

cat food, is expected to develop as outside major players increasingly see China as a lucrative petfood market. As a result, Euromonitor expects that a wider variety of new products will enter the market to cater to the progressively sophisticated tastes of Chinese pet owners. ➔

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Ingredient declarations

Use (and misuse) of parentheses

In last issue's column, I promised to continue my comments this month concerning the Association of American Feed Control Officials' (AAFCO) Pet Food Committee meeting. There simply was not enough column space last month to discuss the issue of parenthetical statements in ingredient declarations along with the rest of the Committee agenda items. However, as I discovered while writing on the subject, even a whole column devoted to this one topic does not do it justice. Those readers who were not able to attend the 2006 Petfood Forum will be able to find a more thorough treatise on ingredient list parentheses in the Forum Proceedings. Below is a synopsis of the issues at hand.

Committee concerns

The first of AAFCO Pet Food Committee's two major concerns is when an ingredient, which itself is comprised of two or more ingredients, is declared in the ingredient list. A common means of declaring such an ingredient is to list the ingredient by name, followed parenthetically by each ingredient (except for exempted incidental additives) within that ingredient. The placement of the multi-component ingredient in the list depends on its descending order of predominance for the product as a whole—while the ingredients listed in the parenthetical are declared in their order of predominance in the multi-component ingredient.

While not uncommon, this practice is not recognized as a viable labeling option in the AAFCO Model Pet Food Regulations. Rather, according to the rules, all ingredients must be

individually declared in descending order, irrespective of inclusion in the final product by itself or as a component of a multi-component ingredient. This strict AAFCO requirement may be superseded by US Food and Drug Administration (FDA) regulations that do allow use of parentheses. Still, FDA permits this to be done only under specific conditions, namely, when the multi-component ingredient has an "established" common or usual name or a "standard of identity" promulgated under the authority of FDA or the United States Department of Agriculture.

Unfortunately, formally codified names or identities do not exist for many multi-component ingredients used in petfoods today. As a result, FDA and AAFCO object to the use of parentheses in many circumstances. For example, describing a separate, discernible component of the food as "pellets" with a parenthetical listing of ingredients within the pellet would not be permitted. The same goes for "pasta" added to a petfood product, although in that case it could be declared by a codified standard of identity that may apply—e.g., "macaroni products."

The Committee's second concern is in regard to "(source of...)" statements in ingredient declarations to identify the origin of a nutrient or substance present in the product. As I understand the concern, such parentheses would be misleading unless every other potential source of that nutrient or substance was similarly identified.

My concerns

In many, many cases, it simply is infeasible for the manufacturer to meet the AAFCO Model Regulations,

i.e., to declare each of the ingredients within a multi-component ingredient in their individual respective orders of predominance by weight for the product as a whole. This is because when these ingredients are obtained from an outside supplier, in the vast majority of cases the petfood manufacturer does not know the quantitative proportions of ingredients within that ingredient. Any attempt to declare all ingredients separately is virtually predestined to result in unintentional misrepresentations of relative amounts of ingredients in the final product. Even when the manufacturer does have explicit quantitative information, the mathematics to ensure proper listing in the product as a whole may be extremely and unnecessarily cumbersome at best.

Further, the available standards and established names for multi-component ingredients are very limited in number. For those few that can apply to petfood ingredients, the regulations often use antiquated (or at least, less popular and commonly understood) terms. Hence, a manufacturer may be forced with using the out-of-date terms, affecting not only the ingredient declaration but potentially the identity of the ingredient in the product name and in claims as well. The only option in these cases, and in the multitude of cases where a suitably codified name doesn't exist, is to attempt to adhere to the inflexible listing of each ingredient in the product as a whole, which as explained above is most likely doomed to be inaccurate.

Regarding the "source of..." parentheses, I personally think they are overused today, which serve more to clutter the ingredient

list and confuse rather than inform the consumer. However, it's often prudent, if not necessary, to use these on occasion to help support claims elsewhere on the label. True, depending on the situation, they can be misleading, such as when a trivial source is identified by a parenthetical while a much more prominent source of that same nutrient or substance is not identified as a source. However, since a given petfood may contain a large number of ingredients that may contain trace amounts of the named nutrient or substance, requiring all potential sources to be identified only encourages more elaborate, and hence more confusing, ingredient lists.

My suggestions

There appears to be little, if any, concern with use of parentheticals to describe multi-component ingredients on human food labeling, even in cases where an established common or usual

name or standard of identity is not used. In fact, although not allowed by strict interpretation of the human food labeling regulations either, the practice has been informally sanctioned in other FDA documents. As a result, the market is replete with examples of this practice, and as far as I can see, they don't deceive or confuse the consumer.

If I wasn't clear in the Petfood Forum 2006 Proceedings, I don't challenge or disagree with the interpretation of the regulations by FDA or AAFCO, nor do I question their motives in making their determination. In fact, I wholeheartedly agree with the goal of the regulators to ensure truthful, non-misleading ingredient label declarations. However, in consideration of practical applications, I respectfully ask for some laxity on this point. My recommendation is to allow parentheticals to describe multi-component ingredients when the ingredient is added as a single ingredient and/or it retains a discernible

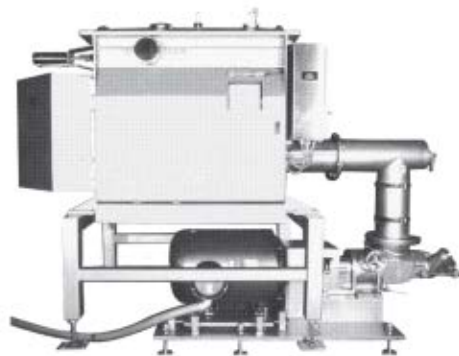
form in the final product, and the name of the ingredient accurately and in a non-misleading manner describes its basic nature, characterizing property, or discernible form.

My suggestion regarding "source of..." parentheticals is to require the identified source of the named nutrient or substance to be the primary source, unless the primary source is also identified. In general, extensive use of these parentheticals should be discouraged, but at the same time judicious use should be recognized as helpful in cases where the ingredient's purpose as a source is not evident from the ingredient name itself. ➔

Dr. Dzanis is a writer and independent consultant for the petfood and animal feed industries on matters related to veterinary nutrition, labeling and regulation. He can be reached at Tel: +1.661.251.3543, Fax: +1.661.251.3203, E-mail: dzanis@aol.com.

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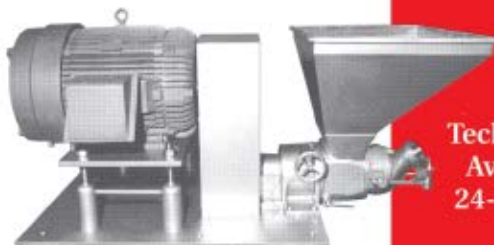
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Liver

Is it delectable or disgusting?

Finding information on liver as an ingredient is not easy; which is interesting considering that liver is an almost universal ingredient in petfoods. It is used as an unprocessed chilled or frozen ingredient in wet foods, as a hydrolyzed spray-dried powder and as a component of flavor systems. For some, it's a vital part of a well-balanced diet—but it's not without its detractors. Whatever your predilection, liver as a dietary ingredient has a vibrant history and an equally rich nutritional composition. So what are the upside and the downside of liver in diets for dogs and cats?

The upside

Liver as part of the diet has a vital connection to medicine, health and nutrition discovery. The discovery of vitamin B₁₂, an early treatment for pernicious anemia in humans, and the 1934 Nobel Prize for Physiology/Medicine, grew out of observations made from anemic dogs fed raw liver.

As an ingredient, beef, pork and chicken livers are the more common sources used in petfoods. Only in specialized circumstances is veal, lamb, turkey, duck or goose identified specifically on the label, and even more rarely are livers from fish or exotic species identified. Liver is high in protein (65-70% on a dry basis) that is very good quality. The protein efficiency ratio of liver is 75-85% of dried egg, which is considered “the ideal protein” (Dust, *et al.*, 2005). Liver is known for being a rich dietary source of minerals like iron, zinc, selenium and copper. The exception being pork liver, in which copper is found in lower concentrations and is nutritionally unavailable (Aoyagi, *et al.*, 1995).

Liver is also known to be a rich source of vitamin A. The addition of liver to a food can supply the required vitamin A for dogs and/or cats. Excessive levels of liver, however, can push the upper limit permitted by the AAFCO dog food nutrient profile—especially in canned food. Marine liver oils are also a very concentrated source of vitamin A (the

Both dogs and cats are noted to show a preference for liver.

— G. Aldrich



renowned Cod liver oil). Liver is also an excellent source of the B vitamins riboflavin, niacin, pantothenic acid, vitamin B₆ (pyridoxine) and choline; and an exceptionally rich source of vitamin B₁₂ and folic acid.

Both dogs and cats are noted to show a preference for liver (Thombre, 2004). For this reason some foods, especially canned foods, have a fair amount of liver in them and may be named accordingly—e.g., chicken and liver formula. Many other foods use a flavor digest or palatant that is often based on liver (primarily chicken), which is hydrolyzed with enzymes and then reacted with other compounds to create “savory” flavors. These can be added to the diet or applied topically as dry or liquid. The goal in this case is to enhance the attractiveness of the food rather than to fortify the food’s nutritional profile.

The downside

The liver is involved with filtering and packaging spent, and sometimes harmful, substances from the body. For this reason, liver as a food often gets accused of somehow being dirty. It must be noted that unlike a static filter on a water purification system, the liver actively conjugates foreign molecules (xenobiotics) for their removal. In this way, foreign materials are continuously removed, and the liver to a certain degree regenerates itself. There are exceptions, however, such as when diets are contaminated with heavy metals or toxins. These can accumulate in the liver.

Compositionally, liver can be too much of a good thing. For example, liver from some species, such as arctic bears and seals, has been reported as toxic to humans due to

the super-high levels of vitamin A. Liver also contains an appreciable amount of purines and pyrimidines (nucleic acids). While these genetic building blocks may have

Liver is known for being a rich dietary source of minerals like iron, zinc, selenium and copper.

some benefits in terms of palatability and gut health, they can be problematic for breeds like the Dalmatian. Due to an impaired ability to convert uric acid (an end product of purine catabolism) to allantoin, the Dalmatian is susceptible to urate urolithiasis (Brown, *et al.*, 2003). For this reason, these dogs should not be fed diets high in purines like those containing a substantial amount of liver or other organ meats.

Rich nutrient content

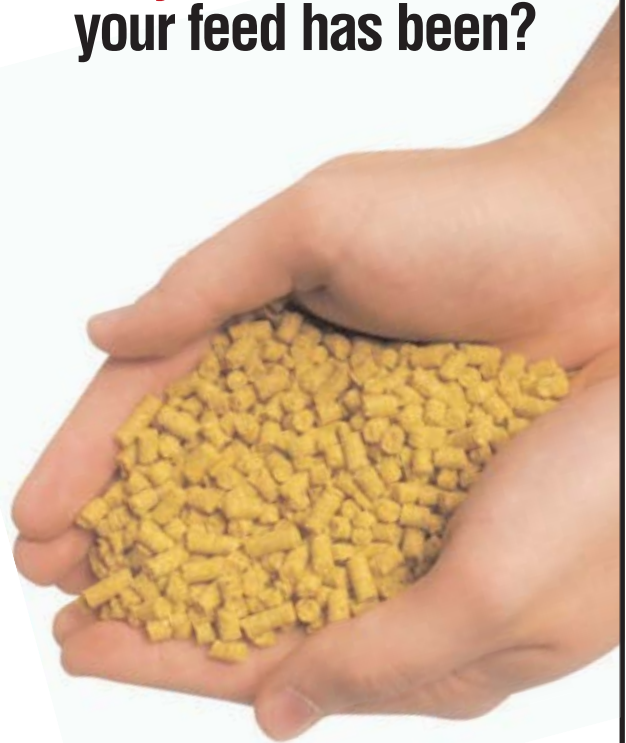
While some people may be squeamish about the notion of feeding organ meats like liver to their dog or cat, it is highly improbable that their pets share this same view. Few dogs or cats would refuse a liver-flavored food or liver treat. This appetite for liver is likely driven by an intrinsic link between the animal's tastes and the rich nutrient content of the liver. To ignore this may overlook some very important nutritional and hedonic needs of the animal. ➔

Dr. Greg Aldrich is president of Pet Food & Ingredient Technology, Inc., whose focus is to facilitate innovations in foods and ingredients for companion animals. He can be reached at Tel: +1.785.271.0238, Fax: +1.785.271.6238, E-mail: aldrich4@cox.net.

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On the road to Nuremberg

May this year in Europe is Interzoo time. Many of the top names in the European petfood business are expected to attend the international pet supplies trade fair being held May 11-14, 2006 in Nürnberg (Nuremberg), southern Germany.

Promotion for the show has placed a heavy emphasis on its continued growth. This will be edition number 29 and it promises to be the biggest yet for display size. Two years ago there were 1,100 exhibitors, say the organizers, but the total number of stand holders in 2006 approaches 1,200. Almost three-quarters of these companies originate from outside Germany. Last time,

The 29th Interzoo is likely to go into the record books as the place for launches of dog treats and chews.

— P. Best



exhibitors came from 47 countries. Their stands occupied 40,000 square meters of net floor space. In May, that will rise to 43,000 square meters.

Expansion has brought the need to use another exhibit hall on the Nuremberg showground. That will mean Interzoo 2006 will be occupying eight halls with a combined gross area of almost 79,000 square meters. Those visiting the

trade-only event are therefore strongly advised to wear good walking shoes. Ideally, they should set aside more than a day for their visit. Experience suggests they should also prepare for an onslaught of marketing messages from petfood companies based in Asia and the Americas, as well as in Europe.

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underline the natural origins of the ingredients used in complete foods for dogs and cats, or that an abundance of products will address allergies and food intolerances. But the 29th Interzoo is likely to go into the record books as the place for launches of dog treats and chews. In Western Europe, this section of the total market has been growing in value at rates of up to 10% per year, compared with 7% or less

for complete dry dog foods. Look out for numerous additional dental chews, for example, among the multitude of products launched at the show.

Reassurance as more cats catch flu

Last month's column referred to the spread of the bird disease avian influenza from Asia into Europe, in terms of the impact this could have on


petfood ingredient demands. However, it rather underplayed the extent to which pet owners have needed to be reassured about the low risk that the pathogenic flu virus might kill their cat or dog.

Owners in Western Europe have become even more alarmed following confirmation of the infection in three cats at an animal sanctuary in Austria, only weeks after the German authorities confirmed that a cat had died of the virus on Germany's Baltic coast. The incident in Germany had been explained as almost certainly due to the cat contracting the virus by eating an infected wild bird. Several European countries have found sick and dying birds among the populations of swans making the annual migration from east to west. It was already known, too, that the virus could pass to cats. Remember the widely-reported episode where the feeding of dead birds had killed tigers at a zoo in Thailand?

Austria's positive tests on the three cats were attributed to a similar cause, since they occurred little more than a month after the country found its first cases of the highly-pathogenic H5N1 influenza infection in wild birds. That hardly helped to dispel the sense of unrest felt by pet owners across Europe, however, especially when the health authorities in Germany advised that all cats in areas where the disease was detected should be kept indoors.

European federation Fediaf has decided to step into the breach with a calming message, describing the indoor restriction on cats in affected areas as a precautionary measure and urging people not to panic. Are dogs also at risk? The federation's note advised that dogs were not known to have contracted the virus. To judge from that advice, perhaps officials in Germany were just playing safe when they said dogs in a flu-stricken zone should be kept on a leash. ➔

Peter Best is the European editor for Petfood Industry magazine. He invites comments and suggestions from all readers about future topics for his column. He can be contacted at: best@watt-4.demon.co.uk.



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de Rosier Inc., John de Rosier, 400 S. 4th Street, Minneapolis, MN 55415 USA, Tel: +1.612.339.3566, Fax: +1.612.339.3568, E-mail: jderosier@derosierinc.com.

A new identity for fish oil

Omega Protein has created a trademark for their refined menhaden fish oil supplied to premium pet, aquaculture and livestock feed manufacturers. The oils, ranging from fractionated oil to ultra-refined vet grade oil, now bear the logos: Virginia Prime Silver, Gold and Platinum. For greater customer convenience, Omega Protein has chosen reliable distributors throughout the country: ADM Animal Health and Nutrition; Animal Science Products; North American Nutrition Companies; Nutra-Blend Corporation; The Old Mill Troy; TPi, LLC and Trouw Nutrition USA.

Omega Protein, Inc., Shawne Halm, 2101 CityWest Blvd., Bldg. 3, Suite 500, Houston, TX 77042 USA, Tel: +1.713.623.0060, Fax: +1.713.940.6166, E-mail: halms@omegaproteininc.com, Website: www.omegaproteininc.com.

Square pails

IPL Packaging introduces its new IML Square Pails, a uniquely user-friendly solution for packaging, protecting and displaying a wide variety of pet products. IPL's innovative new IML pails feature a square shape that allows retailers to maximize cubic space (a 16% space savings over conventional containers). They



are an ideal packaging solution for a wide range of products, including cat litter, bird feed, dog snacks and other pet products.

These IML square pails feature IPL's unique In-Mold Labeling (IML) technology, which allows images to be designed into a label, creating a striking, high-quality graphic that commands attention and distinguishes brands. IML offers top to bottom label coverage including the pail's corners, with quality graphics up to 325 dpi. To ensure maximum protection of contents, these pails feature the IPL's Tamper Evident system, which provides maximum protection throughout all the challenges of distribution and retail environments.

IPL Packaging, 20 Boyd Street, Edmunston, NB E3V 3K8, CANADA, E-mail: packaging@ipl-plastics.com, Website: www.ipl-packaging.com.

Co-extruded barrier films

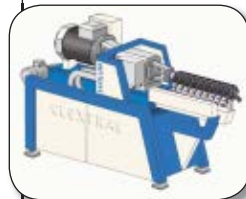
The **Ampac Flexibles**—Performance Films division of Ampac Packaging, LLC, produces the next generation of co-extruded barrier films featuring The Dow Chemical Company's Saran™ polyvinylidene chloride (PVDC) resin. Ampac's effort with Dow has resulted in the installation of the largest multi-layer blown film line in North America, capable of extruding PVDC. Ampac is the first US film manufacturer to offer the capability. Up until now, Saran-based flexible co-extrusions have been blown via smaller dies, resulting in narrow-width films.

Ampac Flexibles—Performance Films, 12025 Tricon Road, Cincinnati, OH 45246 USA, Tel: +1.513.671.1777, Fax: +1.513.671.2920, E-mail: ampacflexibles@ampaconline.com, Website: www.ampaconline.com.

Twin screw extruder designed for the laboratory

Clextral has introduced the Evolum 25, an R&D twin screw extruder

designed for reliable extrapolation of process parameters from this unit to larger production extruders.



The Evolum 25 features screw and barrel designs that follow the same mathematical laws that govern

Clextral's production twin screw extruders, eliminating the guesswork that is sometimes associated with scaleup to production-model extruders.

This benchtop powerhouse offers all the high performance features of Clextral's other Evolum extruders, including variable frequency drive, independent temperature control, and easy access to all component parts. The extruder is equipped with push-button barrel opening which allows immediate screw access for inspection of the product behavior during processing and facilitates cleaning.

Clextral Inc., 14450 Carlson Circle, Tampa, FL 33626 USA, Tel: +1.813.854.4434, Fax: +1.813.855.2269, Website: www.clextral.com.

Improve feed flow in bins

Easy Automation Inc. announces the release of the E-Z Binwacker™, an innovative new product designed to improve feed flow in bins. The patented E-Z Binwacker runs off the direct drive of an auger's anchor bearing automatically tapping with a rubber mallet two times per second on the bin boot bottom to reduce bridging and rat-holing. The E-Z Binwacker fits 30- and 90-degree boots and most industry bins. It has an epoxy coating to slow corrosion and a protective shield. Three models are available to meet the needs of your set-up.

Easy Automation Inc., PO Box 412, 102 Mill Street, Welcome, MN 56181 USA, Tel: +1.507.728.8214, Fax: +1.507.728.8215, Website: www.easy-automation.com.

Cleaning system

The **Supply Corporation** is pleased to offer the Doodlebug Cleaning System from 3M™. This system features two styles of pad holders and four types of cleaning pads designed to handle most cleaning tasks. The Doodlebug holders feature special grippers that hold cleaning pads firmly in place and provide for easy attachment and changing of pads. These holders are available in a hand-held style with a "D-shaped" handle for comfortable hand cleaning, or a swivel style which features a handle socket for use with any standard, threaded handle for additional reach.

Doodlebug cleaning pads are available in white for delicate surfaces, blue for medium-duty cleaning, brown for heavy-duty cleaning and black for very aggressive cleaning tasks.

The Supply Corporation, PO Box 100, Lake Geneva, WI 53147-0100 USA, Tel: +1.800.558.2455, Fax: +1.800.325.9404, Website: www.supplycorp.com.

Cage mills

The **Stedman "H" Series™** Multi-Cage Mill is available in 2-4 or 6-row designs. Four sizes up to 250 tph. The new "H" Series design features include air cannons, heaters and hydraulic ram. The air cannons are mounted at the intake and discharge to help prevent build-up of wet, sticky



material, while the heaters are also installed on the grinder housing to retard build-up of wet material. The hydraulic ram eliminated the gear head motor and rack and pinion that were used on other Stedman cage mills, now costing less to maintain.

The cage mill is a selective crushing, controlled-impact, multi-cage mill designed for sizing minerals and agglomerates, whole grains, chemicals, ores and many other materials. Process wet and sticky materials, as well as dry materials, into a carefully-controlled uniform particle size. Also, available in stainless steel construction. Testing facilities available for proof before purchase.

Stedman, PO Box 299, 129 Franklin Street, Aurora, IN 47001 USA, Tel: +1.812.926.0038, Fax: +1.812.926.3482, E-mail: petfood1pr@stedman-machine.com, Website: www.stedman-machine.com.

LCW checkweigher line

A new checkweigher line, built specifically to accommodate the rigors of the US manufacturing environment, has been launched by **Loma Systems, Inc.** The LCW series operates in demanding, multi-shift production environments

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ECS

- On-line control of product density
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www.sprout-matador.com FEED TECHNOLOGY

typically found in North and South American food and contract packaging facilities. The heavier-duty construction provides greater reliability and run time in more arduous, 24/7 plant conditions where line speeds of 300 to 400 packs per minute are typical.

Another key feature of the LCW checkweigher series is that the PC-based user interface is capable of monitoring up to six separate production lines simultaneously. This is done by providing multiple-lane transport systems and employing up to six separate loadcells to weigh the different products simultaneously. For plants running multiple lines, this capability can significantly reduce capital expenditure, labor and space requirements.

Loma Systems, Inc., Gary Wilson, 283 E. Lies Road, Carol Stream, IL 60188 USA, Tel: +1.630.681.2050, Fax: +1.630.588.1394, E-mail: Gary.Wilson@loma.com.

New shop-welded tanks

Boss Industries, a steel fabrication company, has announced a new “shop-welded” storage tank line. The Boss Tank™ facility produces coated carbon steel storage tanks for the plastic, food, chemical and mineral markets. Boss Industries produces storage for dry bulk and liquid applications, but specializes in hopper bottom tanks. High-quality storage tanks utilize superior design parameters and 3/16-in. plate ASTM A1011 (A36) steel minimums.

Boss Industries, 12057 W 59 Hwy, Oswego, KS 67356 USA, Tel: +1.620.795.2143, Website: www.bosstank.com.

Temperature profiling system

Datapaq's Food Tracker Temperature Profiling System helps you reduce energy costs by optimizing your continuous or batch cook, bake, chill, freeze or fry process. Adjust your process to the most efficient temperature and cycle times and see your energy costs diminish. This easy-to-use system automatically calculates

bacteria kill rates and provides necessary HACCP documentation. This is the long-term solution you have been waiting for. Reducing costs has never been easier.

Datapaq provides key information on the effectiveness of heat processing. With the use of the most advanced and tested techniques for accurately gathering and storing information, Datapaq has created industry-specific standards to analyze, synthesize and report information in a precise and succinct manner.

Datapaq, Connie Wood, 187 Ballardvale Street, Wilmington, MA 01887 USA, Tel: +1.978.988.9000, Fax: +1.978.988.0666, E-mail: cwood@datapaq.com.

Sweep system for grain bins

Brock Grain Systems has unveiled a new commercial-quality bin sweep for clean-out of flat-bottom grain bins. The Brock Sweep-Master bin unloading system is capable of capacities up to 10,000 bushels (330 metric tons) per hour. Offering a simple design and an economical price, the Brock Sweep-Master system includes a number of must-have features requested by users, including many from the company's well-known Model ABC commercial bin sweep. The Sweep-Master system operates as a double-pass sweep and adapts to nearly all grain bin sumps. The system is available in 10-, 12- and 16-inch auger diameters.

Brock Grain Systems, 611 N. Higbee Street, PO Box 2000, Milford, Indiana 46542-2000 USA, Tel: +1.574.658.4191, Fax: +1.574.658.3471, E-mail: brock@brockmfg.com, Website: www.brockmfg.com.

NIR analyzer

The **InfraXact™** is a monochromator-based NIR reflectance and transmittance analyzer with a scanning range of 570-1850 nm. Samples are analyzed in cups that are placed on top of the sample presentation area. Different types of cups are available to ensure optimal sample

presentation and results. **InfraXact** is operated with **ISIScan™** software. **ISIScan** is a user-friendly routine operations program that supports the latest calibration technologies with advanced reporting and data exchange capabilities.

InfraXact provides high analytical reliability. The design is robust and user-friendly. The instrument requires minimal maintenance and operator training. **InfraXact** can be placed virtually anywhere and operated by anyone, while maintaining very high accuracy.

FOSS Analytical, 69, Slangergade, DK-3400 Hilleroed, DENMARK, Tel: +45.7010.3370, Fax: +45.7010.3371, E-mail: info@foss.dk, Website: www.foss.dk.

Corner-sealed and block bottom bags with slider zipper

Zip-Pak announces that **UVA Packaging**, a leading Dutch manufacturer of packaging machinery, is the first to launch vertical form, fill and seal technology that applies consumer-preferred slider zippers to corner-sealed and block bottom bags. Available worldwide, the **Newton 400** is capable of producing over six different types of flexible packages. The new technology is ideal for petfood, powdered products and frozen food packages ranging from two to seven kilograms.

The **Newton 400** utilizes **Zip-Pak® TD Slider™** technology with zippers applied across the top, “short” side of a package in the transverse, or cross-web, direction. This **Zip-Pak** technology makes it possible to incorporate slider zippers on stand-up packaging. The **Newton 400** features high-quality, modular construction for maximum production flexibility. Operators can easily switch between corner-sealed, block bottom, bottom seal, pillow, air deflation and bag-in-bag packaging formats without the use of tools.

Zip-Pak, Melanie Gravelle, 1800 Sycamore Road, Manteno, IL 60950 USA, Tel: +1.815.468.6500, E-mail: melg@zippak.com.



Industry News

Del Monte will buy Meow Mix

Del Monte Foods Co. recently announced that it would buy cat food maker Meow Mix Holdings Inc. for US\$705 million and sell its private-label soup and baby food businesses to focus on its higher-margin branded businesses. Del Monte will acquire Meow Mix from New York-based private equity firm Cypress Group.

The acquisition adds heft to Del Monte's petfood business (accounting for 26% of the company's revenue in 2005), which could help it compete with larger companies. The company said the acquisition of Meow Mix, which had revenue of about US\$250 million in 2005, would add one percentage point to its gross margins. Del Monte also said it expected to get about US\$23 million in tax benefits from the deal.

The transaction is expected to improve Del Monte's overall company performance and significantly enhance the competitive position of the Pet Business specifically. This should increase Del Monte's branded sales to approximately 85% of total net sales. Following the close of these transactions, Del Monte will have a billion dollar petfood business with an improved platform for innovation, as well as greater revenue growth potential and higher overall margins. The Meow Mix deal is expected to close in the first quarter of 2007, Del Monte said.

Richard G. Wolford, Del Monte's chairman and CEO, said: "The acquisition of Meow Mix will immediately strengthen dry petfood, one of Del Monte's largest growth businesses and improve the competitive position of our pet products portfolio. Meow Mix is one of the most powerful brands in the petfood industry. This strong brand equity, which has been

outperforming the fast-growing dry cat food category, provides an excellent platform from which we can leverage Del Monte's strong US retail go-to-market platform and proven innovation skills to transform the competitive position of our pet products portfolio. We see great opportunities to continue to expand the Meow Mix brand equity to the premium wet cat and cat snack segments. Also, with its leading dry cat products, Meow Mix is complementary to our existing 9Lives business which has a stronger wet cat food presence."

The company also announced quarterly profit that beat analysts' estimates. Del Monte posted profit of US\$51.9 million in the third quarter ended January 29, 2006, compared with US\$48.5 million a year earlier. Sales rose 2% to US\$878.5 million. Petfood sales rose 1.9% to US\$227.3 million, with profit in the unit up 22.5% from a year earlier. For more information on Del Monte, see the Top 10 article in the January 2006 issue of *Petfood Industry* magazine.

Petfood Forum Asia postponed

Watt Publishing has postponed its Petfood Forum Asia event originally scheduled for September 11-13, 2006 in Bangkok, Thailand. The event will now take place in 2007. The new dates will be announced in the near future.

Kemin announces alliance with GePro

Kemin Nutrisurance, Inc. announces that it has entered into a strategic alliance with GePro Poultry Protein GmbH & Co. KG for the manufacture and marketing of petfood palatants. Under this alliance, effective January 1, 2006, the Trigarol® and Palasurance™ lines will be brought together to provide customers with

a complete portfolio of liquid and dry digest products. GePro will be responsible for the production, quality and delivery for the lines, while Kemin Nutrisurance will provide marketing, sales and customer support.

Nestlé Group in 2005: Record sales and profits

Peter Brabeck-Letmathe, chairman and CEO of Nestlé SA, said that the company's 2005 results demonstrate the strength of the Nestlé Model. For 2006, he expects organic growth of between 5 and 6%. Nestlé Purina PetCare enjoyed 5.2% organic growth, achieving market share gains in most categories and key markets in 2005. In the US, 2005 was marked by incremental roll-outs of Beneful such as Healthy Coat or Healthy Heart. Dog Chow, Purina's largest brand, continued its success. Cat Chow Indoor Formula, a newly-launched product, achieved sales of CHF125 million in its first year. Golden Products, the cat litter business, also performed well. In Europe, the strategic brands such as Bakers, Pro-Plan and ONE saw a good development. The strong performance of these brands, as well as the growth of the single-serve products, will in the longer term have a positive effect on profitability, according to company reports.

Acquisition of Breeder's Choice Pet Foods announced

Central Garden & Pet Co. (CENT) will reportedly buy Breeder's Choice Pet Foods Inc. for US\$25 million. Breeder's Choice has been family-owned since 1947, and makes all-natural dog and cat foods under the brands AvoDerm, Pinnacle, Active Care and Advanced Pet Diets.

"The acquisition of Breeder's Choice complements our animal health and nutrition strategy," said

Glenn Novotny, Central Garden & Pet's president and chief executive. Breeder's Choice, in 2005, generated net sales of approximately US\$30 million. The acquisition is expected to contribute approximately two cents per fully-diluted share to earnings for fiscal 2006.

Orafti's 5th Research Conference

Orafti Active Food Ingredients will be sharing the latest scientific findings at their 5th Research Conference in Boston, Massachusetts, USA on September 28-29, 2006. The 2006 conference is to be chaired by Professor Glenn Gibson, from the University of Reading (UK) and chairman of the Beneo Scientific Committee, and Professor Allan W. Walker, director of the Division of Nutrition at the Harvard Medical School (USA).

At the two-day event, Orafti Active Food Ingredients will "provide the scientific community with a unique forum to review and discuss the latest scientific data on the health benefits of inulin and oligofructose." The conference, to be held at the Harvard Medical School, will be aimed at the scientific community and will give attendees the chance to be educated and updated at numerous sessions presented by internationally-recognized and well-respected scientists. For further information and/or to register for the 5th Orafti Research Conference, visit www.Orafti.com.

Balchem acquires CMC

Balchem Corporation recently acquired Chelated Mineral Corporation (CMC), a privately-held manufacturer and global marketer of mineral nutrition supplements for multi-specie animal feeds. "We are very pleased with the acquisition of Chelated Mineral Corporation," said Dr. Dana Putnam, director of animal nutrition and health at Balchem Encapsulates. "With this acquisition, Balchem now has a leadership position in two key nutrient delivery technologies—chelation and encapsulation. With

these technologies, we have the ability to develop synergies and create solutions for customers across many animal markets."

Lallemand appoints head of registration

Lallemand has strengthened its Regulatory Affairs department with the appointment of Dr. Bernadette Okeke, a multi-lingual, feed additive registration specialist, to head up its animal nutrition regulatory affairs department. With more than 10 years experience working with the Food Standards Agency and the previous Ministry of Agriculture, Fisheries and Food in London, Okeke brings a combination of experience in food research management, administration and negotiating and implementing food safety and animal nutrition legislation. She will be responsible for the registration of Lallemand's products globally.

Nestlé and Masterfoods receive NAD ruling

A ruling in a dispute between Nestlé Purina PetCare Co. and Masterfoods USA over cat food advertising was recently handed down according to *Pet Product News*. The Council of Better Business Bureaus' National Advertising Division (NAD), which meditates advertising disputes, ruled that Nestlé Purina can claim in ads that its Fancy Feast Gourmet Gold is "the best-tasting dry cat food."

The NAD ruled that Nestlé Purina's in-house, proprietary testing using 200 feline "taste testers" provided a reasonable basis for the company's claim. The NAD further said that independent tests using a panel of 20 cats conducted for Masterfoods by Summit Ridge Farms showing that cats preferred Masterfoods' Whiskas Meaty Selections over Fancy Feast weren't enough to convince it that Nestlé Purina's claims were unreasonable.

Masterfoods had reportedly protested Nestlé Purina's advertising claim that its cat food was the best tasting "versus leading brands."

Nestlé Purina contended its testing of eight competitors' cat foods against its own represented 80% of top-selling or leading brands, allowing it to make the claim.

The NAD ruled that Nestlé Purina should stop advertising that its Fancy Feast dry cat food is the best-tasting food "versus leading brands." NAD said that if Nestlé Purina wants to make the claim, it should name the other specific brands and specific products rather than rely on the vague "leading brands."

In a statement accompanying the NAD ruling, Nestlé Purina said that it was "pleased" with the ruling and "will consider the NAD's recommendation with respect to current and future comparative taste preference claims." While compliance with NAD decisions is voluntary, most companies have recognized the importance of the service and 90% of them comply.

NAD's ruling gives some credibility to Nestlé Purina's proprietary animal food taste-testing methods, which the company conducts in-house by employees. It provided the test methodology to NAD under seal for evaluation. A major part of Masterfoods' argument was that Nestlé Purina's testing was done by employees at its facilities. Masterfoods said those two facts "increased the potential for bias in the results obtained."

What's more, Masterfoods said that independent tests comparing its dry cat food to Nestlé Purina's conducted by Summit Ridge Farms were more reliable and showed that cats liked its food better than Nestlé Purina's. Still, after reviewing the testing methods used by Nestlé Purina, NAD investigators said that the company's testing methods were sound and "rendered any issue of potential bias...moot."

Top US veterinarians validate Greenies® safety

In a series of testimonials, leading US veterinarians said that Greenies® remain the best, most effective dental

dog treat on the market and that they are safe for canine consumption when used as directed. Support from the veterinarians and pet dental specialists from across the nation came in light of recent questions from some pet owners about the digestibility of Greenies.

Veterinarians also commented on the digestibility and edibility of the popular green treat in reaction to a lawsuit claiming that Greenies played a role in the death of a miniature dachshund. Dr. Barron P. Hall, fellow of the Academy of Veterinary Dentistry from Cincinnati, commented on the responsibility of pet owners to monitor their pet's chewing and eating behavior: "Just as a parent must be careful what kind of food a child puts into its mouth, it is a pet owner's responsibility to ensure they buy the right size treat for their dog and that their pet consumes every treat in an appropriate manner."

Petfood company expands

Eagle Pack Pet Foods is expanding its complex, adding a warehouse and possibly 10 new jobs. The walls are up and the ceiling is in the works for a 26,300-square-foot warehouse the company is building at its Indiana, USA location. Eagle Pack makes what it calls holistic-natural petfood, using all-natural ingredients. According to Eagle Pack chief executive officer, John Hart, the market is expanding for the company. About 35% of its sales are outside the United States, up from 15% five years ago.

Dog food makes up 90% of its business, and cat food makes up the other 10%. The company is starting to get into ferret food too. The US\$1.6 million warehouse, which Hart said could create up to 10 jobs on a new third shift, will be used to store food prior to shipping. The new warehouse has six loading docks and uses special foam insulation, required for food storage facilities to keep rodents out. Every week, Eagle Pack ships about 1,100 tons of dog food from its Mishawaka, Indiana, USA location.

German cat contracts H5N1

A domestic cat in Germany has become the first European Union mammal to die of the H5N1 strain of bird flu. The cat was found dead on the Baltic island of Ruegen, where dozens of birds infected with H5N1 have been reportedly found. Further north, Sweden had detected "aggressive" bird flu in two wild ducks and is testing to confirm H5N1.

Meanwhile, vets from 50 countries have been meeting in Paris to discuss ways to combat the virus.

The H5N1 infection in the German cat was confirmed by officials at the national laboratory, the Friedrich Loeffler Institute, but tests are continuing to determine if it is the exact strain that has been found in birds. Cats have been known to contract the virus from eating infected birds. Three rare civet cats in Vietnam died of bird flu last August. In October 2004, dozens of tigers died

at a private zoo in Thailand after a bird flu outbreak.

There are no recorded cases of cat-to-human infection, but the German finding may raise concerns of further cross-species transmission. H5N1 does not pose a large-scale threat to humans. However, experts fear the virus could mutate and trigger a flu pandemic.

Trade show rules may protect property rights

The US Commerce Department has asked for comment on its plans to regulate trade events to protect intellectual property rights. Secretary of Commerce, Carlos M. Gutierrez, recently unveiled several new programs to fight intellectual property theft. The department wants to strengthen protection of intellectual property rights at commerce-supported trade events, in the United States and in foreign countries, it said.

The department is considering requiring trade events that get federal

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support to adopt intellectual property protection policies. Commerce-supported programs include the Trade Fair Certification and the International Buyer programs. The department is seeking comments in the following areas:

- The frequency and nature of intellectual property right infringements at trade events.

- Any measures or written policies that trade events organizers currently implement pertaining to IPR protection.

- The benefits and burdens of the department initiating these policies at trade events.

Comments may be E-mailed to dhuber@mail.doc.gov.

Hong Kong buffet caters to dogs

DogOneLife, a Tokyo-based pet supplies retailer, hosts weekly dog buffets at its Hong Kong location. As reported in *Pet Product News*, the dinners, for pets and their owners, have reportedly been so popular that diners may need to make reservations. The shop rolls out about 30 separate dog dishes, both commercial brands and the store's own baked treats, from which dog owners can select food for their dogs. Commercial dry and canned food and treats are labeled so that dog owners can find out which brands their dogs prefer. For people, the store's café offers rice, noodles, cakes and drinks.

The café and dog treat bakery are open daily, but the buffets are a weekly and holiday event for now. DogOneLife plans the buffet for 15 dogs and 25 people, and as many as five waiters serve the diners. Prices range from about US\$5 for small dogs to US\$10 for large dogs. The café takes up one floor of the multi-level store. The first two floors offer pet supplies, including food, bedding, clothing and other boutique items. A loft between those two floors offers grooming, and above the café sits a floor devoted to services, including a photo studio, a training room and a puppy sales area. The roof boasts a

swimming pool for dogs, an outdoor photo studio and a picnic area. The roof also hosts special functions for up to 50 people and 25 dogs.

The company plans to expand to new markets, including Taiwan, mainland China and the United States. Its strategy will be one store per city, rather than multiple stores in a city.

New DNA bank at Cornell to study genomics

Cornell University's College of Veterinary Medicine has announced the opening of a DNA bank, administered through its Department of Clinical Sciences, to better understand the genetic basis for diseases in many species. Clinicians will now take blood samples (with permission) from the thousands of animals they diagnose with known genetic diseases each year. A DNA bank technician will then isolate the DNA, catalog it and freeze it for storage for use by Cornell researchers.

The archive of DNA will help scientists not only develop improved diagnosis and treatment of diseases and new genetic tests for many inherited diseases, but also could possibly lead to new drugs and treatments. The DNA bank will be especially useful to study complex traits, as in types of cancer, where many genes contribute to susceptibility to disease.

The DNA will be used for research purposes to further science, thus the Cornell animal hospital is not setting up a genetic testing service yet. The DNA bank samples will be used for genetic mapping or linkage analysis. While the DNA bank's focus is diseases of the dog, the archive will represent all animals the hospital treats, including cats, horses, cows, sheep, exotics, wild animals and zoo animals.

The DNA bank is funded by the Department of Clinical Sciences, the Center for Vertebrate Genomics and the Baker Institute for Animal Health, all at Cornell. To contact the DNA Bank, call +1.607.253.3060, or E-mail: dnabank@cornell.edu.

Researchers laud Merrick products

Grammy's Pot Pie, Thanksgiving Day Dinner and Turducken products were named 2006 Best Pet Food by the Glycemic Research Institute, a Washington, DC-based independent research group. For the second year, Merrick Pet Care of Amarillo, Texas, USA snagged the coveted award for three of its 15 canned dog food entrees.

The Glycemic Research Institute certifies products that meet strict criteria—petfood products that carry its seal are the equivalent of health food. According to the Institute: "The Federal GRI Seals of Approval are based on on-going clinical studies that determine the glycemic index, glycemic load, diabetic and fat-storing properties of foods. Determining how humans and animals metabolize foods allows scientists to gain insights as to the varying effects different foods have on metabolism and longevity."

EnviroLogix welcomes two new scientists

EnviroLogix Inc. announced recently that G. David Grothaus, PhD, has joined them as the company's vice president of research and development and chief scientific officer. Also joining the R&D team is Dr. German P. Hoyos, who strengthens the expanding plant pathology group.

Dr. Grothaus brings over 20 years of expertise in developing and managing research processes and product commercialization. He is recognized internationally as an expert in agricultural biotechnology and in the validation and application of test methods for detection of biotech proteins and nucleic acids in grains, plant tissues and food. Dr. Hoyos will be joining EnviroLogix as senior scientist-plant diagnostics, in the R&D department. His many years of experience as a seed production pathologist at Syngenta Seeds, along with his broad knowledge of diagnostic techniques and significant experience in interpretation and correlation of field data and laboratory results. ➔

E-News

Internet advertising revenues soar in 2005

Internet advertising revenues for 2005 are estimated to exceed US\$12.5 billion, according to just-released data by the Interactive Advertising Bureau (IAB) and PricewaterhouseCoopers (PwC). This amounts to a 30% annual increase over the previous revenue record of \$9.6 billion in 2004, according to emarketer.com. IAB and PwC also pointed to another impressive statistic: the US\$3.6 billion in revenues for the fourth quarter of 2005 makes this the second consecutive quarter to surpass the US\$3 billion mark. The IAB and PwC also noted that the fourth quarter revenues represent a 35% increase over the same period in 2004 and a 17% increase over the third quarter of 2005.


After college, most using the web to find work

College graduates are ready to work and using the Internet as a way to find a job, according to a recent survey released by Y2M: Youth Media + Marketing Networks. Y2M, a strategic marketing services company focused on the college and recent graduate market, surveyed 1,500 young people who had just finished college. Asked what they would include on a website for college graduates, over 80% of respondents said that a career center was "somewhat" or "very" important. This compares to 70% who said a financial center was important, 53% who cited a network to stay in touch and 50% who wanted free E-mail forwarding. Almost 70% of respondents said they had posted their resume on the Internet in the past year, with 62% of that group using Monster.com, 49% using CareerBuilder.com and 31% using HotJobs as reported by emarketer.com.

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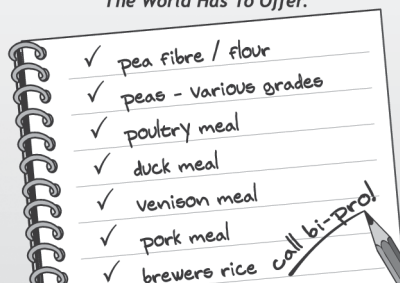
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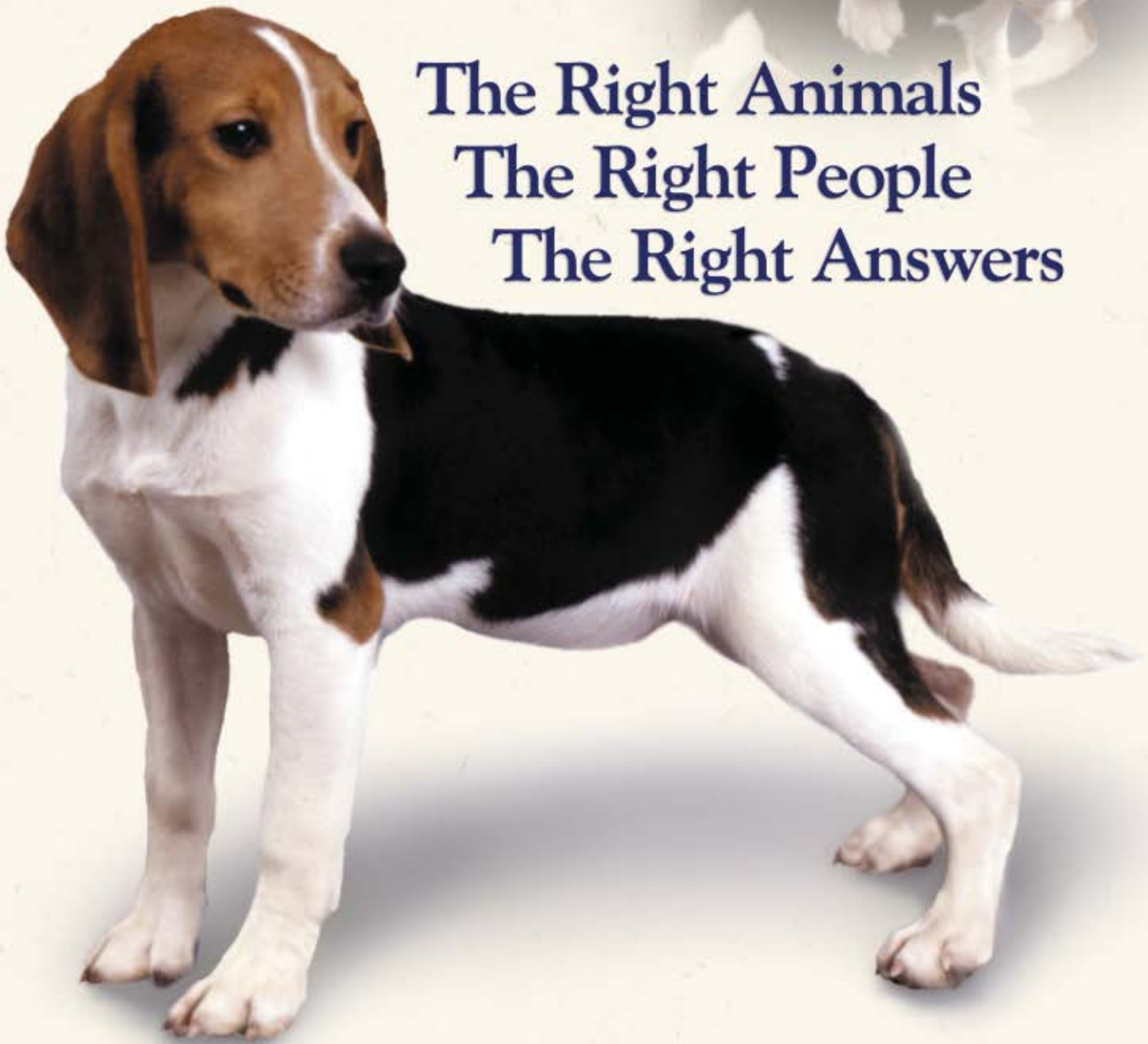
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