

# Petfood Industry

October 2006

WATT

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Bottom-line drying

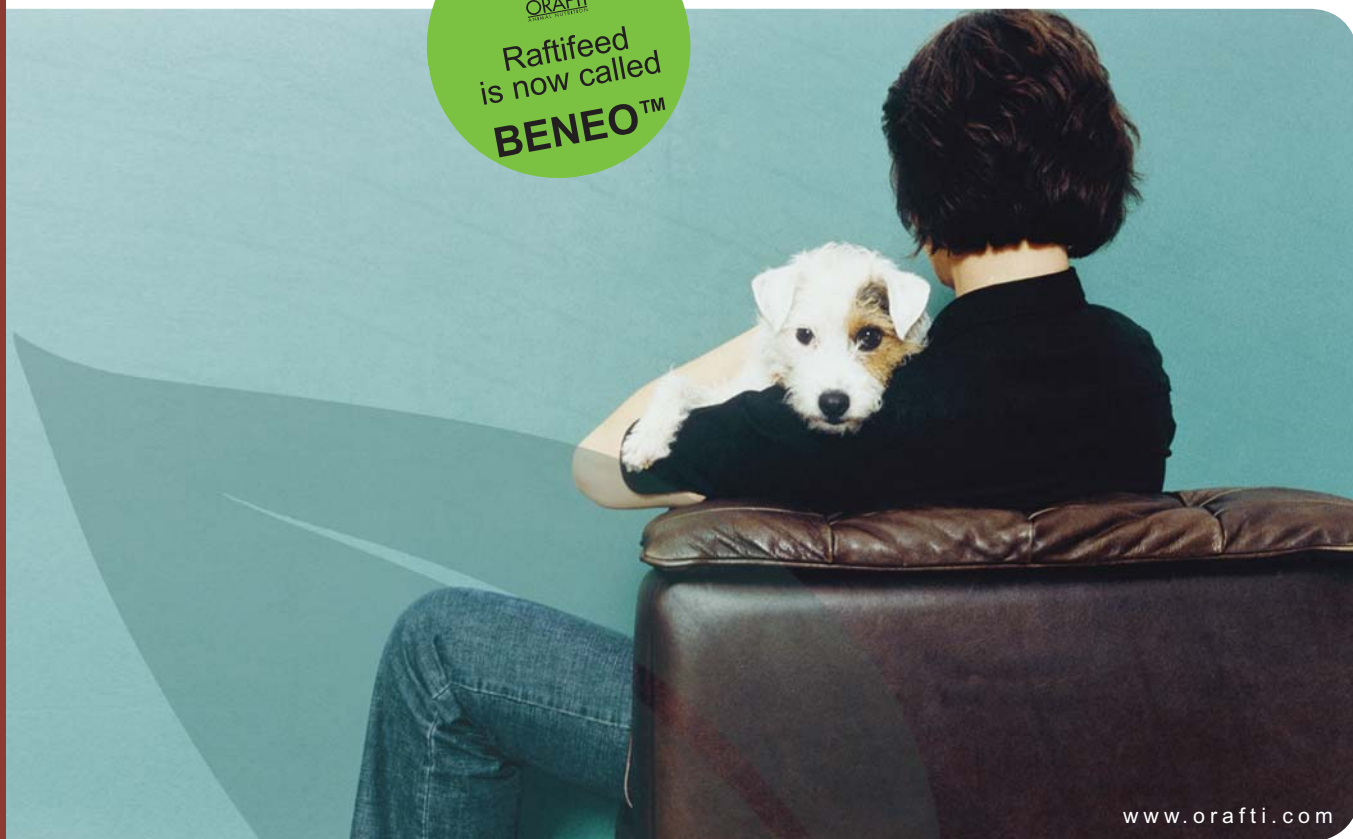
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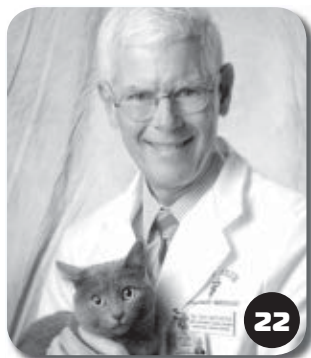
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**On the cover:** Garth and Tyler Merrick like being part of a family business. Learn about their new products starting on page 14.

Photo by: Mark Umstot

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# Growth is optional

“The tipping point is that magic moment when a trend crosses a threshold and spreads like wildfire,” explains Malcolm Gladwell, author of *The Tipping Point*.

Frain, a supplier of pre-owned equipment, thinks several trends in petfood manufacturing are at their tipping points. They include escalating pressure to:

- Reduce operating costs;
- Reduce capital budgets; and
- Reduce time to commercialization.

Petfood producers will begin sourcing their processing and packaging equipment needs in different ways to accomplish their production goals, believes Frain. Contract packagers and used equipment companies stand to gain substantially as companies seek to lower costs, get to market faster and use capital budgets to back proven market winners.

## Human food tipping points

It is no secret that petfood trends, especially in the past decade, have closely paralleled human food trends. *Food Processing* magazine recently published six essential trends in human foods.

**1. Organic.** The magazine scored organic as the biggest and most significant trend for processors to watch. The organic boom is now entering its second gen-

**Organic petfood sales are growing rapidly. They claim to be free of preservatives, pesticides, hormones and antibiotics.**



The organic boom is now entering its second generation of double-digit growth.

— Tim Phillips



eration of double-digit growth, says *Food Processing*, and is on another big upswing.

**2. Health and wellness.** The health and wellness category has a larger footprint than organic, contends *Food Processing*. Any food product can be formulated as organic, but not all products can be called healthy.

**3. Age awareness.** This trend overlaps with the health and wellness trend, especially for the aging US population. However, there are numerous nonhealth aspects for processors to consider as they help 77 million baby boomers move into old age.

**4. Portion control.** In some ways, portion control is a health tool. However, notes *Food Processing*, this year it deserves its own category because it is a merging of health with the recurrent trend for more convenience.

**5. Globalization.** Asian, Hispanic, African American and other ethnic minorities will make up more than 35% of the US population in five years. More traffic between cultures and instant global information mean rapid dispersal of once regional preferences.

**6. Kosher and halal certification.** Both areas are experiencing prolific growth rates. Kosher is still progressing at dou-

ble-digit rates, and halal (Islamic permissible) is in a sudden, major growth spurt.

## Positive developments

*The World Market for Pet Food and Pet Care Products*, a recent report by Euromonitor International, cites several developments that bode well for the global petfood market. These include the “humanization” of pets, product and packaging innovations, improvements in distribution, rising pet levels in emerging markets, rising consumption levels of industrially prepared petfood in developing markets and consumers trading up to premium and superpremium products.

The worldwide petfood market is set to continue to grow strongly in emerging and mature markets.

## Embrace change

Change is inevitable, growth is optional. Change energizes some organizations and paralyzes others. Successful organizations are marked by the ability to embrace change rather than ignore it or react to it, says business consultant Ira Blumenthal. In the words of Ben Franklin, “When you’re finished changing, you’re finished.” ●

*Dr. Phillips is the editor of Petfood Industry magazine. He can be reached at Tel: +1.815.734.5644, E-mail: tphillips@wattnet.net.*

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# Industry News

## 9Lives container wins Best of Show



A package for Del Monte 9Lives cat food has been named winner of the Bernard M. Seid Best of Show Award in the 43<sup>rd</sup> annual Package of the Year Award sponsored by the National Association of Container Distributors ([www.nacd.net](http://www.nacd.net)). Distributor All-Pak ([www.all-pak.com](http://www.all-pak.com))

worked with Del Monte to design the award-winning container.

A unique element to the package is a feeding bowl/measuring cup that snaps over the container's threaded closure. This component also let Del Monte add a free can of its moist cat food.

To see other NACD winners, visit [www.packworld.com/go/w173](http://www.packworld.com/go/w173).

## GMO rice may impede petfood trade

Bayer CropScience has notified the US Department of Agriculture and the US Food and Drug Administration that the company detected trace amounts of GMO rice in samples taken from commercial long grain rice. The product line, called Liberty Link (LL), includes three rice products.

As a result, the European Union has tightened document requirements on US long grain rice imports. The European Commission adopted the decision requiring imports of long grain rice from the US to be certified as free of the unauthorized GMO LLRice 601. Japan, for which the US is the largest rice exporter, has already suspended imports of US long grain rice. As of press time, the effect on petfood trade remains uncertain.

Bayer indicated it had no plans to market LLRICE 601 and therefore had not requested deregulation. Based on reports that LLRICE 601 is in the marketplace and a petition from Bayer, the US Animal and Plant Health Inspection Service (APHIS) will conduct a deregulation process, including an opportunity for public comment. Because the line of GMO rice in question was regulated, APHIS is conducting an investigation.

## Colgate-Palmolive profit dips 17%

Colgate-Palmolive Co.'s second-quarter profit slid 17%, as restructuring charges outweighed sales growth. The company said net income declined to US\$283.6 million from US\$342.9 million in the prior-year quarter. Restructuring charges totaled US\$115.9 million in the latest period, a sharp increase from the US\$28.7 million in charges logged last year.

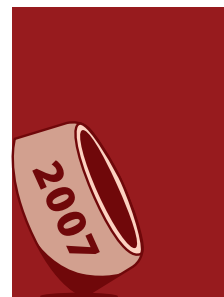
Sales were US\$3.01 billion, up 6% from US\$2.84 billion a year ago and ahead of analysts' consensus target of US\$2.96 billion. Unit volume rose 4%. Prices rose about 2% worldwide, while favorable foreign exchange boosted results slightly. Colgate attributed the sales growth to new products and increased advertising spending.

## Petfood Forum 2007 topics announced

*Petfood Industry* and Watt Publishing Co. have announced topics for Petfood Forum 2007.

Sessions in the marketing/production track include new product trends, popular functional ingredients, product/packaging case study, superpremiums, global sales trends, niche markets, production innovations and the latest packaging materials/equipment.

For the nutrition/regulatory track, topics include US regulatory report, new and significant global regulations,



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obesity prevention, nutrition for skin and gut health, cognitive palatability testing, innovative treats, genomics—customized diets and point/counterpoint—the new NRC requirements.

Three new general sessions include large pet retailers on what pet owners want, a roundtable of petfood company CEOs and exclusive market research.

Petfood Forum 2007 will be April 16-18 in Chicago, Illinois, USA. Visit [www.wattnet.com/petfoodforum/home.cfm](http://www.wattnet.com/petfoodforum/home.cfm), or contact Marcia Riddle (attendees) at [mriddle@wattnet.net](mailto:mriddle@wattnet.net) or +1. 815.734.5633, or Ginny Stadel (exhibitors) at [vstadel@wattnet.net](mailto:vstadel@wattnet.net) or +1.815. 734.5691.

## AFB International acquires NuPetra

AFB International Inc. announced recently that it has signed a final purchase agreement to acquire NuPetra LLC, the petfood palatant business of NutriScience Technologies Inc., and NuSci Laboratories LLC. The terms of the transaction were not released. The name of the combined company will be AFB International, and NuPetra's brand, BioFlavor, will continue under the AFB International corporate flag. Jacquelyn A. Levin will remain the CEO of the new combined company.

## Nestlé: strong first half 2006 sales

In the first six months of 2006, consolidated sales of the Nestlé Group amounted to CHF47 million (US\$38 million), an increase of 11% over the prior year. The increase in

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reported sales was mainly driven by above-target organic growth of 6.4%. The group's core food, beverage and nutrition business supplied the bulk of the growth and yielded three-fourths of the margin improvement.

PetCare performed well worldwide, with real internal growth of 4.6% and organic growth of 6.6%, Nestlé said. Market share in Europe is growing, and the product mix is improving. Progress was also achieved in markets such as Japan and China, as well as in Latin America, while North America continued to perform well, according to the company.

### Future scenarios in the Italian pet market

Mediatic has scheduled an event for the Italian pet industry on November 8 in Reggio Emilia, Italy. Manufacturers, trade press and experts will discuss new trends and development opportunities including products, export countries, distribution channels and international

## MEDIATIC

trends. For more information, contact Mediatic, E-mail: [media@mediatic.it](mailto:media@mediatic.it), Tel: +39.0522.383620, Fax: +39.0522.381484.

### Betagro finds success in Thailand market

Pets are becoming more popular as home companions for urban residents in Thailand. The shift has led to an increase in annual sales of dog and cat food, up more than 10% over the past several years. Nopporn Vayuchote, executive vice president of business development for Betagro Group, said his firm had enjoyed substantial growth in its dog food business in Thailand—which is estimated to be worth 3.6 billion baht (US\$96 million) this year, up 13% from the year before. He said Betagro held a 10% share in the

3.2-billion-baht (US\$85 million) dog food market last year.

The success has driven Betagro, which focuses mainly on processing and exporting chicken, to invest 100 million baht (US\$2.7 million) this year to expand its dog food factory in Lop Buri. The expansion will bring its total capacity to 4,000 tons per month from 1,500 tons now. The firm hopes to capture a 20% share of the dog food market within the next few years.

Nopporn said the company also planned to add cat food to its production line to tap into the 800-million-baht (US\$21 million) market in Thailand. He said competition was still light for cat food with only 15 brands. There are more than 50 brands of dog food sold in Thailand.

### US\$14.5 billion in petfood sold in USA

America's fascination with upscale gourmet is being passed onto pets, as sales of premium petfoods—natural/



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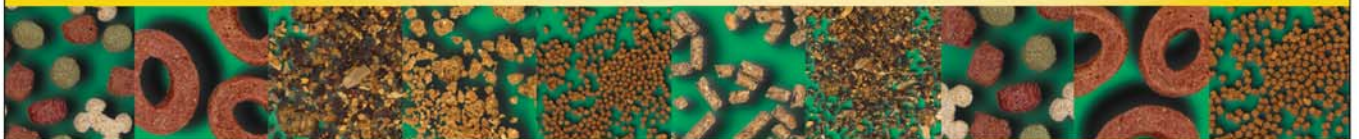
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organic, fortified/functional, weight control and lifestage, among others—helped boost 2005 sales to US\$14.5 billion. According to *Pet Food in the US: Riding the Premium Wave*, a new report from Packaged Facts, converting consumers and their pets to higher-priced, premium foods will continue to

be a major driver of success in the US petfood market—which is projected to reach nearly US\$19 billion by 2010.

During the first six months of 2006, 175 new petfood (dog and cat) products, including extensions of existing lines, were launched. The new products encompassed 844 SKUs, almost as many

as appeared in all of 2005.

For more information, go to [www.packagedfacts.com/pub/1190796.html](http://www.packagedfacts.com/pub/1190796.html) or [www.MarketResearch.com](http://www.MarketResearch.com).

### Grow your organic business

On October 30-31, Strategic Research Institute will hold the Business of Organic: Finance, Marketing and Operations at the Hilton Sonoma Wine Country in Sonoma, California, USA. The conference will focus on dynamic marketing techniques and financial aspects of running an organic and natural food or beverage business. Niche segments will include natural petfood. The forum will provide a forecast for the organic industry, which has reached US\$14 billion. (For details, see p. 34.)

To view the full program or to register, log onto [www.srinstitute.com/CX598](http://www.srinstitute.com/CX598), or contact [info@srinstitute.com](mailto:info@srinstitute.com), Tel: +1.212.967.0095.

### Canada anti-BSE feed rules include petfood

Tissues from cattle that could transmit BSE will no longer be allowed in petfoods, chicken feed and fertilizer under new Canadian federal rules announced recently. The Canadian Food Inspection Agency (CFIA) is tightening rules on the products to crack down on potential ways of spreading bovine spongiform encephalopathy (BSE).

Because of their role in passing on the disease, protein-based tissues from the skulls, brains, nerves, eyes, spinal cords and bones of older cattle have been banned from cattle and ruminant feed manufactured or sold in Canada since 1997. The new rules widen the ban on those tissues to include all livestock feed, petfood and fertilizers, according to the CFIA.

The widened ban is scheduled to take effect July 12, 2007. Smaller feed-producing operations will be given an additional six months to make sure they can comply with the new rules. The federal agency said it hopes the new rules will make the Canadian cattle feed system 99% free from sources of potential infection. ●

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Editor's note: Submissions and feedback are welcome. Contact Jenny Kvamme, Tel: +1.815.734.5637, Fax: +1.815.734.5649, Email: jkvamme@wattnet.net.



## Nutro's doggie dessert line

Nutro Products Inc. has introduced what it calls the pet counterpart to the classic homemade American dessert—Natural Choice Healthy Desserts. Developed as healthy treats with a dog's palate in mind, these four new “desserts” include Apple Torte, Berry Cobbler, Carrot Cake and Pumpkin Crumble. Each 3-oz. can has real fruits and whole grains like oatmeal and flaxseed, contains no added sugars and has less than 100 calories per serving. [www.nutroproducts.com](http://www.nutroproducts.com)

## Waggy Tail Treats

Everyday Gourmet Treats from Waggy Tail Treats bakery are made with natural ingredients, including potato flour. For dogs with wheat and gluten allergies, the bone-shaped treats contain no wheat flour. They come 24 bones to a package. [www.waggytailtreats.com](http://www.waggytailtreats.com)



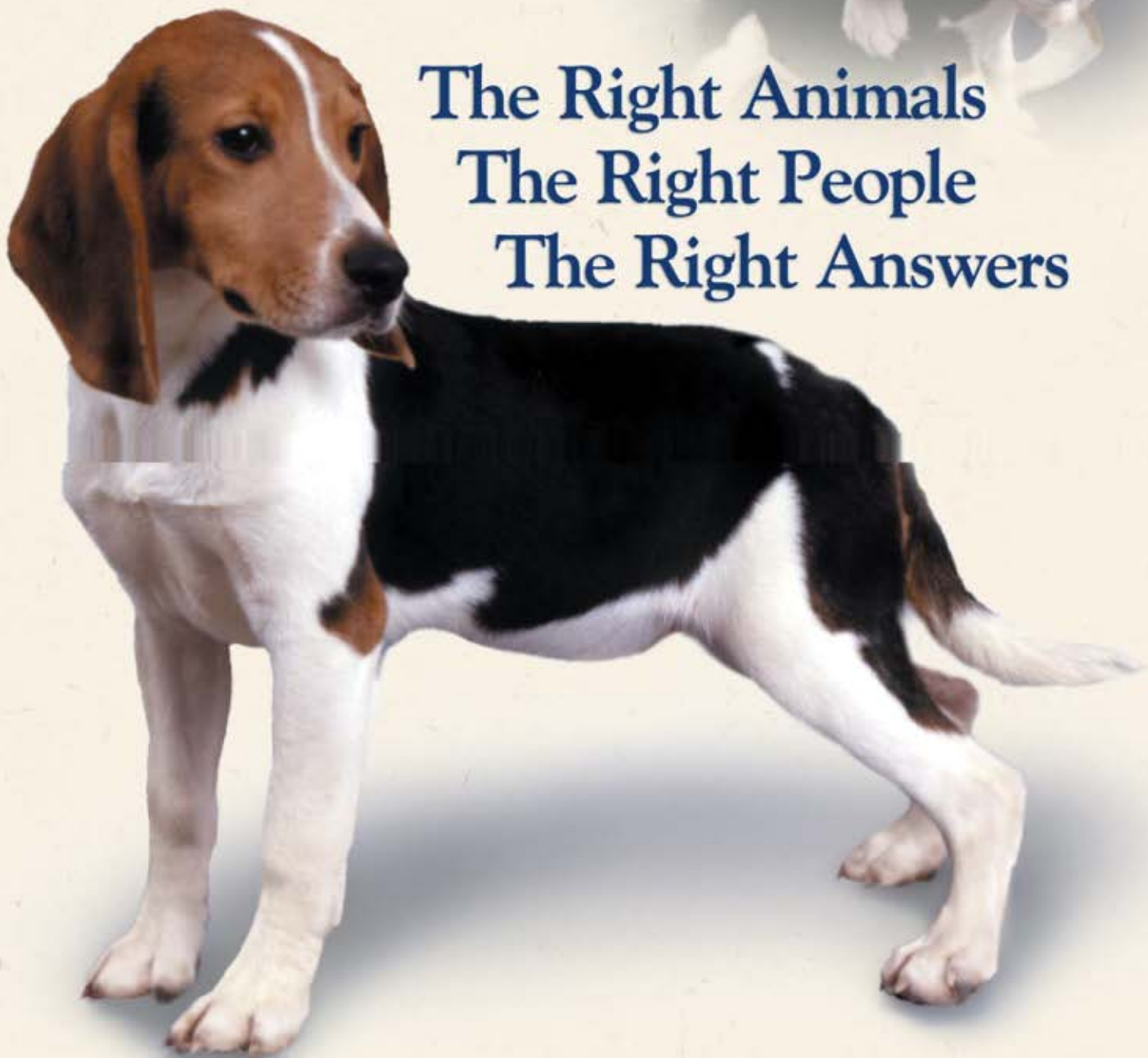
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# Merrick's gourmet excursion

Family-owned company  
develops trendsetting products

BY JENNY KVAMME, DVM

Four new canned products will make it to the shelves soon including Rocky Mountain Rainbows, French Country Café, New Zealand Summer and Brauts-n-Tots.

**M**errick Pet Care is a family-owned company where success seems to self-perpetuate. For just under two decades, the company has been manufacturing pet treats and petfood products, and even today, the company is working hard to improve and expand its product lines.

It all started with the patriarch of the family, Garth Merrick, who was the driving force behind the success of the treat line and the entire company's origin. He started out making private label petfood and later added treats to the product line with great success. Today, the company sells more than 65 treat products.

Many members of the Merrick family have played a role in the company. Tyler Merrick, Garth's son, moved back home to Amarillo, Texas, USA, to be closer to his family following the events of September 11, 2001. He currently serves as president of Merrick Pet Care, while Garth is CEO.

## Family ties

According to Tyler Merrick, there are a lot of positive aspects to being part of a family business. Merrick Pet Care has many employees who have been with the company since its inception, adding to the sense of working with an extended family. Tyler and his siblings are the third generation of the Merrick family to work in the petfood industry. Lee Merrick, Tyler's grandfather, was the first. The young Merricks grew up working in the plant in various departments. Tyler and his sister, Noelle, and brothers, Sloane and Teel, all worked in areas like maintenance and bagging dog food on the packaging line.

In a day and age where mergers and acquisitions happen every day, Tyler Merrick believes it is unique to see a family business still function as one. Merrick Pet Care doesn't have any outside investors, but it does have professional

management and “great people that help make the business work every day.”

Recently, the company went through a transition that has been “monumental,” according to Merrick. The addition of a COO (James Witcher) and a CFO (Sam Spradlin) for the first time has changed some of the philosophy/management styles at the company. As Merrick stated: “We are a David in a Goliath world, so our style will always be to innovate and do it well. We like what we do and have a lot of fun doing it with a high degree of professionalism. We really aim to put people in a position to succeed, dream, innovate and create and do their jobs every day without being micro-managed.”

### Birth of a gourmet revolution

Approximately a year after Merrick joined the family business, he started working on developing a new line of gourmet petfoods and re-inventing the image of Merrick Pet Care. Merrick says the idea for his gourmet line came to him one sleepless night. “I couldn’t sleep and so I went out and started working, and the ideas started flowing. The product names and recipes all came in the early morning hours. We took these ideas and began working on a line of petfoods that would rival the best in the world. We worked with our nutritionist, research and development team—and the rest is history.”

Merrick Pet Care launched the eight gourmet wet dog food entrees in October 2003. Today, the company offers 15 dry and wet gourmet “excursions.” These entrees feature human-grade ingredients including freeze-dried fruits and vegetables, trout, buffalo, duck, beef, venison, lamb, chicken, turkey, lobster, salmon and crab, to name a few.

## Pet Food of the Year

Merrick Pet Care has concrete evidence that their products are performing well, because their dog food has won the title of “Pet Food of the Year” from the Glycemic Research Institute (GRI). This is the second year in a row that Merrick’s petfood products have won the accolade. The award was presented to Merrick Pet Care for its Turducken, Grammy’s Pot Pie and Thanksgiving Day Dinner gourmet canned dog food products.

The GRI is based in Washington, DC, USA. As a nonpartisan, nonprofit organization, the GRI is committed to responsible scientific research to provide a greater understanding of the glycemic index and its relation to foods that are glycemicly acceptable for the overweight, diabetic and health-

conscious public.

Due to high demand from the public for information regarding petfood, GRI added the Pet Food of the Year award and its accompanying Seal of Approval. To qualify for Pet Food of the Year, the product must have a low glycemic index and be formulated without meat by-products or ingredients known to be harmful to animals. The food must also be nutritious and palatable, with a focus on longevity. GRI has no ties to the petfood industry and does not accept monies from any company for the Pet Food of the Year award. For more information on the GRI, visit [www.glycemic.com](http://www.glycemic.com).



Garth and Tyler Merrick

Some of the creative names include Cowboy Cookout, Turducken, California Roll, New England Boil, Thanksgiving Day Dinner (complete with cranberries) and Surf & Turf. These products were even the first petfood to be featured in *Gourmet* magazine, in fall 2005. Grammy’s Pot Pie (wet product) is the company’s top seller to date. For the dry dog food, the most popular versions are Wilderness Blend and Grammy’s Pot Pie.

Merrick noted that he likes to think the company is working ahead of the trends. “We try to think about what trend is coming next and what we can do to be a part of it. We also really love being pioneers, too, sort of setting our own trends. We definitely try to be the innovators in our market, and not the followers,” he said.

Merrick Pet Care prides itself on its ingenuity, as well as its award-winning marketing. Merrick noted that he has seen the largest petfood companies in the world take some notes from his company’s ideas, and he has seen its influences in their packaging, advertising and product names. He is flattered by that fact, but at the end of the day it means “we have to work that much harder.”

Marketing at Merrick Pet Care has always been done entirely in-house.

## Merrick Pet Care

has seen approximately 1,000% growth in sales from September 2001 to September 2006.

—Tyler Merrick

The marketing department has won numerous awards for its packaging and advertising campaigns. Merrick laughs when he hears people say, ‘Merrick hired some fancy-schmancy ad agency from Fifth Avenue to remake the company.’ We were just some guys sitting in a plain-Jane warehouse in Hereford, Texas, on the side of a highway, throwing up ideas on a wall—and some of them stuck.”

### Driving innovation

Merrick Pet Care is continually working on new products. In fact, four new canned products just recently hit the shelves, including Rocky Mountain Rainbows, French Country Café, New Zealand Summer and Brauts-n-Tots. A dry cat food has been in production for about six months.

The company has also been working hard on developing a new gourmet sausage treat line that is expected to be in stores in November or December. Initial orders have been so overwhelming that it has backed up production, and the company is expanding capacity to meet demand.

Merrick Pet Care purchased from Italy the equipment necessary to produce these treats. Merrick says it is the first company in the US to have the technology. The unique casing is a sprayed-on vegetable-based product. The new products are modeled after the formulations for dry and canned food products that were so successful for the company. The initial roll-out will include six sausage flavors: Cowboy Cookout, Grammy’s Pot Pie, Thanksgiving Day Dinner, Venison Holiday Stew, French Country Café and New Zealand Summer.

Today, products made by Merrick Pet Care total approximately 135 (dry, canned foods and treats included). The company must be doing something right: It has seen approximately

1,000% growth in sales from September 2001 to September 2006. There has also been good growth in the private label division. In the 2005-2006 *Pet Age* Retailer Report, Merrick Pet Care brand treats were listed as the second best-selling brand leader in key pet supply categories.

### Operations and distribution

Merrick Pet Care currently employs about 400 people. Most of the day-to-day business functions are handled in Amarillo. The company’s dry and



**Merrick Pet Care’s new gourmet sausage treat line is made with technology new to the US.**

canned food production facilities, as well as two distribution centers, are located just down the road in Hereford. With the two centers combined, Merrick Pet Care occupies about 200,000-square-feet of plant and warehouse space. The dry petfood plant currently operates 24 hours a day, six days a week, and runs two extruder lines. The cannery operates two shifts on three lines that fill multiple size cans (3 oz., 5.5 oz. and 13 oz.). There are also a couple of treat plants in Hereford and the surrounding area.

Merrick Pet Care brand products are handled by a traditional distribution network that sells to the specialty pet retail channel. Merrick believes

this creates a more exclusive image for the company’s brands. The company still manufactures some private label product that goes through a variety of channels as well, such as grocery house brands that sell through grocery/mass merchandiser-type outlets. Geographically, distribution for Merrick products is North American. The international market is something the company may consider in the future.

### Future of the industry

Merrick believes that, in general, the level of quality in the petfood products on the shelf today is better than ever. He imagines the future of the petfood industry will continue to follow the human consumer channel. From this arena, crossover products and ideas will no doubt soon be seen in the pet aisle, according to him.

Merrick points to diversity as the key to a bright future for the petfood industry. “I think the other thing you will see in our industry is diversity of products used. Consumers love variety and that goes for their companion pets as well. They like to try not just new dog food flavors within a brand, but new dog food brands on a regular basis. This is a carryover from the human consumer product arena. They want the latest, greatest new thing, and they still have their favorites, like chocolate chip cookies, but they don’t mind variety. The same is trickling down to petfood.

“People and their companion pets will continue to try new things, so I think we will continue to see more variety in the petfood aisle, pet treat aisle, etc., and I think that will mirror what consumers purchase for themselves,” Merrick continues. “The exciting thing is that consumers have more choices and better choices than ever before. It is our goal to be one of their choices on a daily basis.”



# Solutions For Success.



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**Sourcing /  
Consulting**



**Logistics**

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Quality Ingredients and Service.

**3D Corporate Solutions**

## OUR PRODUCT OFFERING

### **Fresh / Frozen (Joplin, MO)**

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Emulsified Chicken  
Ground Turkey  
Emulsified Turkey  
Chicken Blend  
Backs & Necks  
Liver Products  
Chicken & Egg  
Concentrated Broth  
Custom Freezer Storage  
Proprietary Products

### **Spray Dried (Joplin, MO)**

Liver & Chicken  
Chicken  
Turkey  
Chicken & Rice  
Liver Oil  
Fat  
Savory Fat  
Proprietary Products

### **Chicken Cook Plant (Danville, AR)**

Chicken Meal (EU & Domestic)  
Chicken Fat (EU & Domestic)  
Low Ash Chicken Meal (EU & Domestic)

### **Midland Ingredients (Monett, MO)**

White Rice  
Brown Rice  
Bran  
Hulls

### **Sourcing (Monett, MO)**

Poultry By Product Meal  
Chicken By product Meal  
Pet Food Grade Fat  
Feed Grade Fat  
Meat & Bone Meal  
Pork Meat & Bone Meal

### **Logistical Services (Monett, MO)**

Rail  
Truck: Hopper/Reefer/Dry Van

# Aflatoxin insurance

## A clay called HSCAS can help petfood manufacturers avoid a crisis



BY TIM PHILLIPS, DVM

**D**espite careful ingredient screening for aflatoxin, low concentrations may get into your petfood undetected. A clay called HSCAS (Novasil) can provide you with better assurance of product safety.

Recent research at Texas A&M University has established better ways to inactivate aflatoxins. Earlier this year, dozens of dogs in the US died after eating aflatoxin-contaminated, commercial petfoods. The use of HSCAS could have prevented these deaths.

### Heavy losses

Aflatoxin is a naturally occurring mycotoxin produced by two types of mold: *Aspergillus flavus* and *Aspergillus parasiticus*. *Aspergillus flavus* is widespread in nature and is most often found when certain grains are grown under stressful conditions such as drought.

Aflatoxins are potent liver toxins and carcinogens. Suppression of the immune system is also a common effect. Among the various mycotoxins, aflatoxins have been the subject of the most intensive research. The losses sustained from companion animal toxicity and death are incalculable.

### Modern control measures

Aflatoxin control measures include using genetically engineered, resistant crops and ensuring appropriate storage conditions. These precautionary steps are followed by careful testing of susceptible commodities for aflatoxins and banning the lots that, in the US, exceed the regulatory action level of 20 parts per billion for aflatoxin B1. It is the most toxic type and is regarded as the “sentinel” substance for all other aflatoxins. HSCAS clay has lately been shown to be a good control measure.

### Inactivation of aflatoxins

In a presentation at Petfood Forum 2006, Timothy Phillips, PhD, summarized research in his lab at Texas A&M University. It has focused on the development of innovative sorption strategies for the detoxification of aflatoxins. In particular, the lab has employed isothermal analyses and molecular modeling techniques to characterize and design clay-based materials for the enterosorption, and inactivation, of aflatoxins in the gastrointestinal tract.

Hydrated sodium calcium aluminosilicate (HSCAS) has been shown to prevent the adverse effects of aflatoxins in various animals when included in the diet. Studies have also confirmed that HSCAS can alter the bioavailability of aflatoxin in dogs (Bingham *et al.*, *Food Chem. Toxicol.*, 2004). Fortunately, HSCAS does not interfere with the utilization of vitamins and micro-nutrients in the diet. However, it is im-

## Testing for aflatoxins

**J**ohn L. Richard, PhD, thinks you should know which mycotoxins are of concern in your facility, based on the ingredients you use. Richard is an independent consultant to several petfood companies, both domestic and international, in the field of mycotoxin testing. Richard further counsels that you should determine your criteria for accepting or rejecting these incoming ingredients. Next, you should choose a test kit based on these criteria, and it should perform acceptably in your hands.

Most of the error in testing for mycotoxins, says Richard, is in sampling. You should be cognizant of the appropriate methods of sampling the various kinds of vessels delivering commodities to your facility.

### Rapid test kits

Several commercial firms have marketed rapid test kits for use in determining the aflatoxin concentration in corn samples. These test kits are self contained and provide all the necessary instructions to complete an analysis on-farm, at the elevator or at the buying point.

It is important to remember that aflatoxins can be concentrated in a few kernels that contaminate an entire load. For this reason, a representative sample is essential to determine the degree of contamination. A multi-level probe sampling at several sites and depths will give the best results. AOAC approved methods generally agree that an initial sample weight of 10 pounds (5 kilograms) is desirable.



**The aflatoxin molecule. The regulatory action level for aflatoxin B1 is 20 parts per billion. Aflatoxins are potent liver toxins, carcinogens and immune suppressants.**

toxin sequestering agents should be rigorously evaluated *in vitro* and *in vivo* and should meet the following criteria:

- Efficacy in multiple animal species;
- Safety in long-term studies;
- Negligible interactions with vitamins and micronutrients;
- Favorable thermodynamic characteristics of ligand sorption; and
- Tolerable levels of priority metals and dioxins/furans.

portant to note that it does not protect animals against other mycotoxins.

### Key criteria

Clay minerals are structurally and chemically diverse. Many are ineffective and/or nonselective for aflatoxins. Based on the Texas research, all afla-

### Research abstract

HSCAS is commonly used as an anti-caking agent in animal feeds. It tightly and selectively adsorbs aflatoxin. The following is an abstract from Bingham *et al.*, *Food Chem. Toxicol.*, 2004.

In a crossover study, six dogs were

randomly fed a commercial dog food (no-clay control) or the same commercial dog food coated with HSCAS (0.5% by weight). These dogs were administered a subclinical dose of aflatoxin B1. Diets were switched and the process repeated. The HSCAS coated diet significantly reduced urinary aflatoxin M1 by  $48.4\% \pm 16.6$  SD versus the control diet.

The conclusion: HSCAS protects dogs fed diets with even minimal aflatoxin contamination. Despite regular and careful ingredient screening for aflatoxin, low concentrations may reach the final product undetected. Therefore, HSCAS may provide the petfood industry further assurance of canine diet safety.

### Customized insurance

Aflatoxin management systems ultimately function like an insurance policy. Not every facility requires the same insurance plan. It is important to tailor a mycotoxin management program to fit the needs of individual facilities. ●

GIPSA-approved tests				
Company	Test kit	Test type	Test kit range	Test format
Charm Sciences Inc.	ROSA® Aflatoxin P/N 20 ppb	Qualitative	Screens @ 20 ppb	Lateral flow strip
Charm Sciences Inc.	ROSA® Aflatoxin P/N 10 ppb	Qualitative	Screens @ 10 ppb	Lateral flow strip
EnviroLogix Inc.	QuickTox™ kit for aflatoxin in corn	Qualitative	Screens @ 20 ppb	Lateral flow strip
International Diagnostic-Distributed by Romer	Afla-20-Cup	Qualitative	Screens @ 20 ppb	Solid phase immunoassay
Neogen Corp.	Agriscreen	Qualitative	Screens @ 20 ppb	Microtiter well plate assay
Neogen Corp.	Real for aflatoxin	Qualitative	Screens @ 20 ppb	Lateral flow strip
Neogen Corp.	Veratox-AST	Quantitative	5 – 300 ppb	Microtiter well plate assay
Neogen Corp.	Veratox	Quantitative	5 – 50 ppb	Microtiter well plate assay
R-Biopharm	Ridascreen FAST SC	Quantitative	5 – 100 ppb	Microtiter well plate assay
R-Biopharm Rhone Ltd.	AFLACARD T20	Qualitative	Screens @ 20 ppb	Enzyme immunoassay
Romer	AgraStrip™ Total (20 ppb)	Qualitative	Screens @ 20 ppb	Lateral flow strip
Romer	FluoroQuant	Quantitative	5 – 300 ppb	Rapid, fluorometric, solid phase cleanup
Romer	FluoroQuant Afla (FQ Afla)	Quantitative	5 – 100 ppb	Rapid, fluorometric, solid phase cleanup
Vicam	Aflatest	Quantitative	5 – 100 ppb	Immunoaffinity column

**USDA's GIPSA-approved aflatoxin testing methods. GIPSA is the Grain Inspection, Packers and Stockyards Administration. This table reflects kits submitted to GIPSA by kit manufacturers. Kit performance, as claimed by the manufacturer, was verified by GIPSA as of September 1, 2006.**

# Bottom-line

## The return on investment in your dryer can be especially high

BY TIM PHILLIPS, DVM

**P**etfood companies have worked hard in recent years to shed costs and maximize productivity. “However, oftentimes in our industry,” notes Wenger Manufacturing’s Robert Sunderland, “we find most of the attention focused on the extrusion cost center. Other cost centers tend to be overlooked—until plant capacity is reduced.”

“Most petfood producers are well aware of the energy cost for their drying operation,” says Aeroglide’s Dan Poirier. “However, too many producers do not track the costs of overdrying or downtime.”

► **Overdrying due to non-uniform drying.** “A well-designed, well-adjusted petfood dryer,” says Poirier, “should be able to dry your product

to within  $\pm 0.75\%$  or better. Suppose that your extruded petfood cannot contain over 10% moisture. If the product coming out of your dryer has a moisture variation of  $\pm 3\%$ , you must dry your product to 7% moisture on average to ensure that no product is over the specified 10% moisture limit. The result is a 3% loss in production. If your petfood line is producing 75,000 tons per year, a 3% loss in production from this line represents 2,250 tons per year of lost production. At US\$600 per ton, that adds up to US\$1.35 million.”

► **Downtime for maintenance and sanitation.** “A dryer producing 10 tons per hour of extruded petfood can be producing well over US\$100,000 worth of product each day,” explains

Poirier. “If you’re spending even three hours a week of unplanned maintenance or cleaning downtime, you have lost 30 tons of final product per week, which equates to US\$650,000 per year of lost production.”

Many producers can significantly reduce their drying costs and increase their production rates by taking a closer look at their drying operation.

### New technology

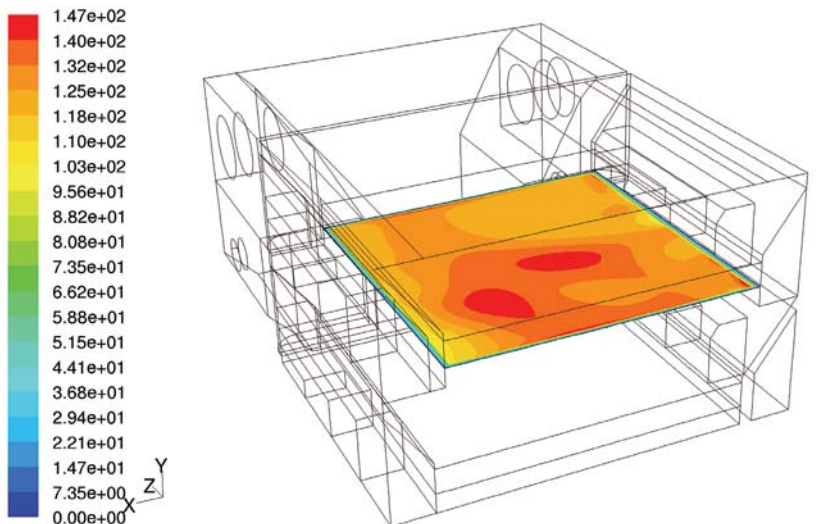
Efforts to maximize productivity often require employing new technology. A good example is the use of computational fluid dynamics (CFD) to improve dryer engineering and performance.

Sunderland told *Petfood Industry*: “CFD provides detailed information on airflow velocity (speed and direction), particle distribution (for fines), temperature and pressure.”

Wenger engineers decided to use CFD to gain a more scientific understanding of how its dryer worked. Fluent Inc., a leading vendor of CFD software, assisted in the efforts. Wenger is now using its new understanding of CFD to make better use of the current dryer design and streamline the process of developing the next generation. CFD offers the potential to improve dryer design by allowing engineers to quickly evaluate alternate configurations and get a much better understanding of why a particular configuration performs the way it does.

The results of the simulation, which were displayed in a graphical format, revealed far more information about the dryer’s operation than had previously been available. By viewing graphical depictions, Wenger engineers gained a much deeper understanding of how the existing design worked (see figure, left).

In particular, the airflow path lines in the settling chamber revealed strong

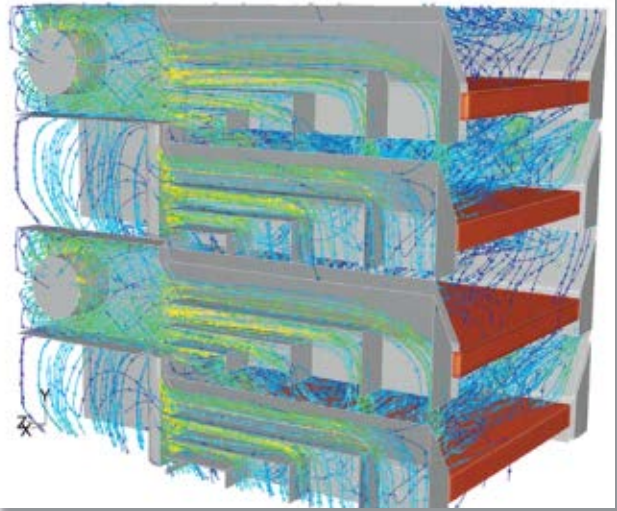


Distribution of vertical velocity over the dryer product beds. Contours of Y velocity. Source: Fluent.

# drying

swirling flows that helped explain why the Wenger design was so effective in removing fines from the air streams. The engineers were also able to quantify the flow distribution over the product beds, which helped explain the consistent performance provided by the original design (see figure, right).

**Airflow path lines through the dryer channels. Path lines are colored by velocity magnitude (ft./min.). Source: Fluent.**



## More on energy efficiency

When asked his thoughts about state-of-the-art drying technology, Sander Geelen of Geelen Counterflow replied, “With the current cost of oil, energy costs are a major concern. There is no single process in your plant that uses more energy than the dryer

**“Too many producers do not track the costs of overdrying or down-time.”**

does. For that reason alone, the dryer is a prime target for any efforts to reduce the energy bill. The good news is that large gains are usually possible when you focus on the dryer. The large majority of dryers older than five years are unlikely to have maximum energy efficiency—mostly because they are based on the wrong principles.”

Geelen believes that drying technology has improved so much that only the latest generation of vertical dryers are optimally efficient. He thinks if you replace a dryer more than 15 years old with the latest technology, you likely will be able to reduce energy consumption by 50%. The investments involved can be significant, he notes, but

the savings usually provide a payback time of two years or less. When you take into account the savings, thanks to reduced maintenance, higher moisture uniformity and less cross contamination, the payback time is even better.

“In general, you can say that any extruded petfood process that consumes more than 2,500 kJ/kg of evaporated water is not efficient enough,” contends Geelen. “Energy injected into the product by the hammer mills, conditioners and extruders can and should be recovered by passing the cooler exhaust air into the dryer. If that is properly done, the risk of polluting the dryer is controllable. In any case, the increased cleaning frequency that it may cause is easily recovered by the energy savings.”

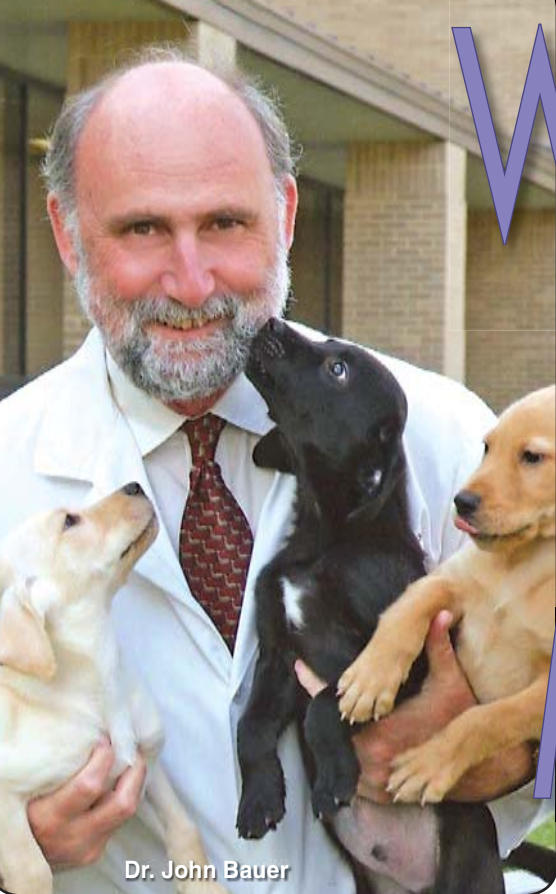
Geelen states that any dryer exhausting air above 60°C is usually wasting energy. “In practice only counterflow dryers can achieve this number without adding expensive energy recovery systems for the air exhaust. If the dryer is designed and operated for optimum efficiency, there is hardly anything that can be recovered. The air that is exhausted from a counterflow dryer will be close to the condensation point, which means the drying air has been used to maximum advantage.

“In short, there are many tricks for improving an old dryer, but the results will always be a compromise. Investing in a modern dryer is the best way to go. Adding up all pros, the payback times become very interesting.” ●

## Contributor contacts

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# What vets think



Dr. John Bauer

## **Petfood Industry** asks veterinarians about the future of nutrition and petfood

BY JENNY KVAMME, DVM

**M**anufacturers of petfood tend to focus on one main goal: to produce a safe, healthy product that cats and dogs will enjoy eating and continue eating for many years. To accomplish this goal, manufacturers spend a lot of time and money on R&D. Based on the results of this costly and time-consuming research, new and innovative petfoods are developed. In some cases, these foods have the ability to prevent certain disease states, prolong life and improve quality of life for many animals around the globe.

We were interested to find out just what veterinarians thought about current commercial petfoods, as well as what they thought the future of nutrition might entail. *Petfood Industry* asked several veterinarians to respond to several questions about dog and cat foods today.

### **The veterinarians include:**

Dr. John Bauer, the Mark L. Morris professor of clinical nutrition at Texas A&M University;

Dr. C.A. Tony Buffington, professor of veterinary clinical sciences at The Ohio State University;

Dr. Rebecca Remillard, senior staff nutritionist for Angell Animal Medical Center in Boston, Massachusetts, USA;

Dr. John Robb, a practicing veterinarian for 20 years who now heads up a movement called Protect The Pets.

**Q:** What is the most common question your clients ask you about petfoods? What sources of information do you use to answer these questions?

**Bauer:** The question I am asked most is, "What is the best food to feed my pet?" I rely on the published literature. Also, scientific publications and actual data from authors working for petfood companies in collaboration with university and other scientists are helpful. I try to help pet owners separate marketing-based material from the science-based information.

**Buffington:** They ask what to feed their pets. I use my own experience, biomedical literature, the Internet and colleagues as sources of information as well.

**Remillard:** I am asked about ingredients. My information sources are usually the AAFCO manual or FDA website.

**Robb:** Usually, they ask if the food they are currently feeding is good or not. Honestly, I generally shoot from the hip. I don't really read too much about petfood, although I receive lots of information from many sources. Sometimes I receive information from one client on what is working and pass it on to another.

**Q:** How do you decide which petfood to recommend to your clients? How could the industry help you make the best decision?

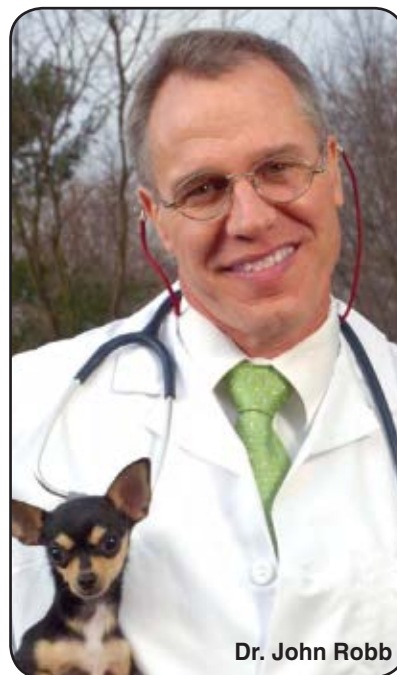


Dr. C.A. Tony Buffington

# about petfood



Dr. Rebecca Remillard



Dr. John Robb

**Bauer:** I address my responses to pet owners specifically for their situations. The petfood industry should continue to partner with the veterinary profession at many levels (practitioner, university, organized associations and the media) to maintain effective lines of communication appropriate to each group. Much of the new information on pet nutrition is proprietary. However, at some point in time, the industry should consider releasing some of this information to communicate nutritional advancements made by them to a broader group.

**Buffington:** Again, I use my own experience in making these decisions. I don't know if there really is a best decision.

**Remillard:** It depends on whether you are talking about healthy or sick animals. For healthy pets, anything that has passed AAFCO feeding trials is worthy of trying. For sick pets, whatever diet best fits their medical condition or conditions is recommended.

**Robb:** I generally tell them to stick with a name brand food like Iams, Eukanuba, Purina or the like. I recall problems in cats when some "off" brands did not have enough taurine and problems were seen. It made me feel that name brands were better. My faith in any industry is so low these days it's difficult. Companies say a lot of things, but what is really true? Building integrity and trust would be key to me.

**Q:** Are petfood manufacturers meeting the needs of pets today? What could the industry be doing better?

**Bauer:** I think responsible petfood manufacturers are meeting the

needs of pet owners. They are developing petfood products that owners can relate to on a personal level. Many companies are taking a proactive approach to the benefits and responsibilities of pet ownership beyond nutrition as well, which also helps elevate the health status of both people and their pets.

A commitment to advancing nutrition research should be high on the list of things that the petfood industry as a whole should be investing in. Have some kind of a "check-off" program whereby some small amount of the sale price of each bag or can of food could be donated to a research fund or foundation. This research could then be conducted freely, without any perception of company bias or conflict of interest at all levels. Such a program would allow more rapid advancement of the science-based information that we sometimes find lacking on certain nutritional topics.

Second, any significant effort to help separate fact from fiction regarding pet animal nutrition for busy veterinary practitioners, groomers, breeders and pet owners will have an important multiplier effect on pet health, the human-animal bond and, ultimately, everyone involved in pet ownership. This could be in the form of print or electronic media, seminars, owner forums, etc. Peer review of this type of information would help assure its accuracy and usefulness.

**Buffington:** Yes, they are. I would recommend that manufacturers fund more research to provide evidence for the many unsupported claims made by marketers.

**Remillard:** Probably, although most pet owners do not seem to believe it. The petfood industry could better

explain their industry practices and ingredient sources to the pet owner.

**Robb:** My gut feeling is that they are. It is not that one food is so much better than another, but what works best for that animal. I think if companies put live people on the phone I would feel better about calling and getting information. The Hill's company does a good job of this. If other companies had a similar hotline, I would call more.

**Q:** What petfood product would you like to see available to pet owners? What's missing in the marketplace today?

**Bauer:** Obesity and its related health risks and problems continue to be the most frequently seen nutritional disorder in companion animals.

The development of products to aid in the prevention and treatment of obesity, along with simple strategies to assure owner compliance and monitor progress, is needed.

**Buffington:** Products that are based on real evidence (funded by independent sources, published in

the peer-reviewed literature for a start). Space on the shelves would help. A visit to a local pet store with 85 veterinary students left us all overwhelmed with the number of products crowded together and clamoring for our attention—which I imagine is where the temptation for unsupported claims arises.

**Remillard:** True weight loss, weight management or obesity preventive diets.

**Robb:** I think even I would like to see a greater focus on dental products. In other words, foods that help the teeth—especially in cats and small breed dogs.

**Q:** What trends are becoming more common in your practice? What do you expect to see happen in the future of petfood and pet nutrition?


**Bauer:** Various niches have developed, many in parallel with owner lifestyles. Functional ingredients in foods will likely continue to be an important aspect of pet nutrition, as is the trend toward holistic-type products. Food safety will also continue to be important. Further out will be the use of molecular biology to help pinpoint specific metabolic traits in an animal or breed that will then help provide information on the best food to feed that particular dog or cat.

**Buffington:** Trends seem to depend on the economy. As Werner Heisenberg [the founder of quantum mechanics and the uncertainty principle] said: "Predictions are dangerous, especially about the future."

**Remillard:** Clients are asking more about nutrition. General practicing veterinarians cannot adequately answer those questions. Clients will seek out nutritional advice from nutritionists and sources other than their general or local vet.


**Robb:** I have noticed humanization and the move toward more organic products. I believe the public values animals more and more. ●

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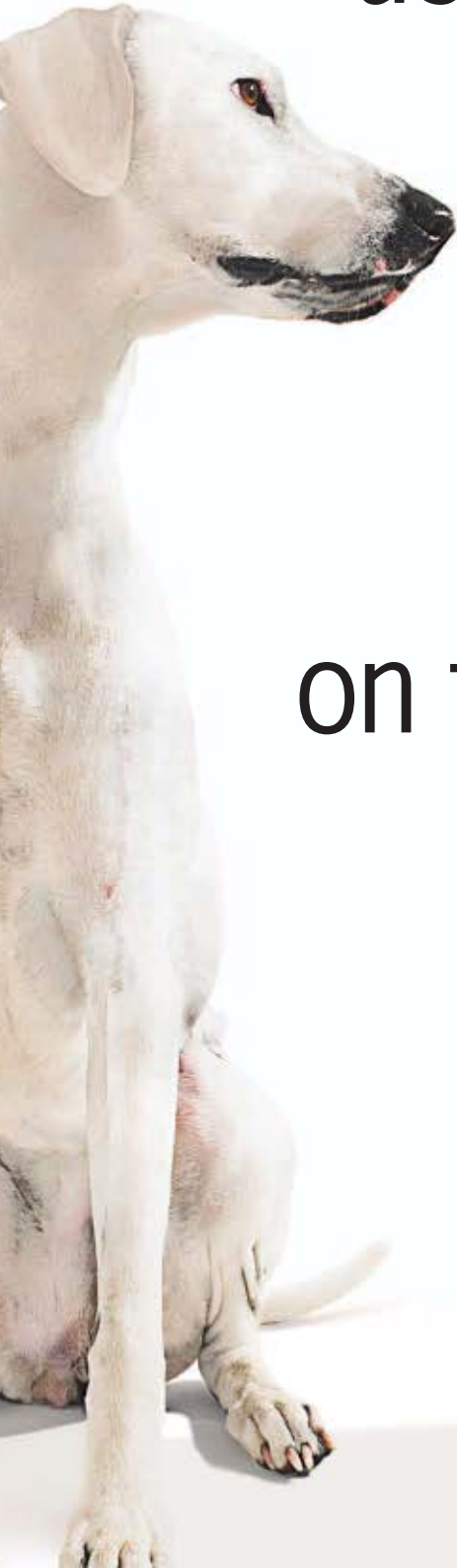
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A Clear Focus On The Future



# AAFCO annual meeting shows some progress

**T**he Association of American Feed Control Officials (AAFCO) annual meeting was held in Oklahoma City, Oklahoma, USA, on August 5-7, 2006. Everyone I spoke to especially enjoyed the bull riding event at the local arena on Saturday evening. For some reason, I had a particularly hard time with my cell phone while in the downtown Oklahoma City area. Based on the progress made in some of the committee sessions, I'd say my phone wasn't the only thing having trouble connecting.

## Delays and setbacks

Neither the AAFCO Pet Food Committee nor the Model Bill and Regulations Committee had petfood-related items up for membership vote at the general session. Thus, there are no newly enacted regulations for which manufacturers have to plan in the immediate future.

In the committee sessions, the Pet Food Committee decided to drop its work of seven years on drafting regulations on when guarantees are to be declared as minimums or maximums. After at least several unsuccessful attempts to forward recommended amendments, it was concluded that the initiating cause (a state's application of the general animal feed regulations to petfood labels) had already been resolved, hence action was no longer necessary.

Also in the Pet Food Committee session, action was tabled after brief discussion on the American College of Veterinary Nutrition proposal that would require mandatory calorie content statements

**There are no newly enacted regulations for which manufacturers have to plan in the immediate future.**

— David Dzanis



on all dog and cat food labels. A related item on the agenda—the Pet Food Institute's proposal for amendment of PF10 to address labeling requirements of “weight management” products—was not discussed at all.

The Model Bill and Regulations Committee had anticipated that the AAFCO membership would vote on the new model bill that would have clarified a state's authority over non-commercial feed at the general session, but that item was withdrawn at the last minute. Apparently, even after eight revisions of the draft document, there are still significant concerns, so it's back to the drawing board for the Committee. A proposal to amend the definition of “feed ingredient” in the Model Bill for commercial feed to be consistent with the noncommercial feed bill was put aside pending resolution of the non-commercial feed bill matter.

## Safety regulations

It was expected by some that the Feed Manufacturing Committee's Animal Feed Safety Regulations would be moving forward, too, but that was not the case. If eventually passed, these new model rules would impose additional processing, sanitat-

ion, distribution and record-keeping requirements upon animal feed (including petfood) manufacturers. For now, there are still significant concerns about language (e.g., “contamination” vs. “adulteration”) and other matters, so the Committee is going to the Board of Directors for guidance.

Finally, a working group within the Feed Labeling Committee had developed a plan that would pave the way for carbohydrate-related claims. However, after some discussion, the working group chair withdrew the plan from consideration by the Committee to work on it further. Unfortunately, the chair is leaving his feed control official position, so it's unknown at this time who will take over the working group.

## Some progress

Notwithstanding the above, I don't want to give the impression that there was no progress made in Oklahoma City. With publication of the National Research Council's *Nutrient Requirements of Dogs and Cats* a couple of months ago, the Pet Food Committee is moving forward with plans to convene expert panels to review and update as necessary the AAFCO Dog and Cat Food Nutrient Profiles and

feeding trial protocols.

A new policy statement to clarify when guarantees are required (and more importantly, when they are not required) to support claims on petfood labels has been sent to the Board of Directors, as were editorial changes to the petfood nutritional adequacy affidavits. With luck, the corrected affidavits will appear in the 2007 AAFCO *Official Publication*.

## The Pet Food Committee is moving forward with plans to form expert panels.

An amendment of the definition for taurine to allow for use in dog foods and a change to the animal liver definition to allow poultry (as well as mammalian sources) were voted and passed by the AAFCO membership at the general session. At the Ingredient Definitions Committee session, an amendment of the definition for selenium yeast to allow for use in dog foods and a new tentative definition for hydrolyzed yeast were accepted by the Committee and are moving forward for Board and, hopefully, membership consideration.

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Although the Animal Feed Safety Regulations did not move forward, the Animal Feed Safety Program document that describes basic goals and objectives has left the Feed Manufacturing Committee for Board consideration. ●

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# Glucosamine gains popularity

**F**oods and supplements containing “chondroprotective agents” have become popular in the petfood aisle. In general, these products are targeted at aging animals with deteriorating joints and, to a lesser degree, large-breed dogs. The two most common elements found in these joint-health products are chondroitin sulfate and glucosamine. Together they are reported to reduce joint pain and stiffness in dogs afflicted with osteoarthritis (Canapp, *et al.*, 1999; McCarthy, *et al.*, 2006).

While chondroitin sulfate plays a large and defined structural role, glucosamine is a more elemental part of collagen and cartilage formation. Last month’s column focused on chondroitin sulfate—its origin, production forms and analysis. This month’s focus is on the smaller but more prevalent half of this pair—glucosamine.

## Physiological role

Glucosamine, also known as chitosamine in older literature, is chemically described as 2-amino-2-deoxy-D-glucose. The similarity to glucose goes beyond just its name. Its molecular weight is almost exactly that of glucose (179.17 vs. 180.16, respectively; Merck, 1996) and structurally the difference is no more than the substitution of an -NH<sub>2</sub> for an -OH and the rearrangement of another -OH. With this minor change in structure, the molecule goes from being the universal unit of carbohydrates to being one of the leading building blocks of mucopolysaccharides.

No big deal, you may say—these mucopolysaccharides comprise things like the exoskeleton of shellfish, collagen in skin, connective tissues, cartilage of

**Glucosamine is a more elemental part of collagen and cartilage formation.**

— Greg Aldrich



bone and joints, synovial fluids and even blood-typing at the red blood cell surface. Glucosamine is also a key part of extracellular matrix building blocks such as hyaluronic acid, sulfate and heparin sulfate. Without glucosamine, tendons, ligaments, skin, nails, mucous membranes and other body tissues wouldn’t take shape or function properly.

Glucosamine is synthesized physiologically in adequate quantities from glucose (via fructose-6-phosphate) and the amino acid glutamine (as the -NH<sub>2</sub> contributor), so it is not classically considered to be required. Glucosamine is at the crossroads of glycoprotein metabolism where phosphorylated glucosamine (glucosamine-6-phosphate) is the precursor for a host of glycosaminoglycans (GAGS) like hyaluronic acid, heparin, chondroitins, sialic acid, gangliosides and various other glycoproteins.

Because of the breadth of its demand, glucosamine availability may be the rate-limiting step in the synthesis of new joint glycoproteins. Thus, the theory goes that the provision of preformed or supplementary glucosamine can serve as a secondary reservoir. In dogs and man, oral glucosamine has been reported to be readily absorbed (Adebowale, *et al.*, 2002) and assimilated in the articular cartilage and elsewhere in the body (Setnikar and Rovati, 2001).

It has also been reported to improve joint structural integrity, reduce swelling and diminish joint pain associated with osteoarthritis. Specifically, glucosamine stimulates the chondrocytes to produce proteoglycans, inhibits collagen and cartilage degradative enzyme activity and stimulates anti-inflammatory activity (Waldron, 2004).

## Commercial sourcing

Glucosamine is an abundant material. It is found most readily in the structural framework of animal and marine by-products (e.g., horns, hoofs, bones, shells and scales) discarded during industrial food production. In this form, glucosamine is nutritionally unavailable. The rigid glycoprotein matrix that constitutes keratin and collagen are virtually indigestible by mammalian enzymes. Thus, strong hydrolytic processes must be utilized to unlock the tenacious bonds that bind them together.

The preferred starting material is crustacean waste, primarily crab or lobster shell, due to its abundance. The shells are subjected to a series of alkali and acid hydrolysis steps to produce an intermediate chitin, which remains indigestible. To extract purified D-glucosamine, the chitin must undergo further alkali and acid hydrolysis, distillation and purification steps. The purified



compound can be purchased as the salts of glucosamine sulfate or glucosamine hydrochloride or as the acetylated derivative N-acetylglucosamine.

The sulfate form is the most researched and most often used in human chondroprotective supplements, whereas glucosamine hydrochloride is found most often in veterinary/pet applications. Both are nutritionally available forms of glucosamine, with little detectable difference in utilization upon ingestion.

### Concerns and challenges

Because glucosamine is an amino sugar, there is some concern regarding its effects on the diabetic animal. While ingestion of glucosamine has been reported to be hyperglycemic (Kajinuma, *et al.*, 1975), at common dosages used in petfoods it is unlikely to become an issue. Another concern often noted about commercial sources is allergies due to its derivation from shellfish; however, no reports have been made to support this concern. Further, there are sources of glucosamine produced through fungal fermentation of corn that are merchandised as vegetarian and/or free from concerns over shellfish sensitivity. Whether this is a cost-effective source is not known.

Processing losses through extrusion, canning or baking are not common; however, some petfood companies will add 10-15% more than the minimum guarantee for insurance. Finally, analytical techniques for glucosamine appear to be less controversial and more straightforward than those for chondroitin sulfate. Since it is an elemental amino sugar, the analysis is very consistent with measurement of other monomer sugars via high performance liquid chromatography or, as one lab reports, by capillary electrophoresis.

### Sorting it out

While the biggest issue surrounding the chondroprotectives, chondroitin sulfate and glucosamine, is still their tenuous status with regulatory officials, by all indications sourcing and application of the ingredients is pretty straightforward. Further, a good case can be made

for their value. However, manufacturing controls, ingredient consistency, purity and safety information are not as readily available. Not to mention the speculative nature of determining a nutritional level versus a therapeutic dose. It may be a long time before the core details are sorted out. ●

*Dr. Greg Aldrich is president of Pet Food & Ingredient Technology Inc., which facilitates innovations in foods and ingredients for companion animals. Tel: +1.785.271.0238, E-mail: aldrich4@cox.net.*

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# Natural and organic niche markets on the rise

**N**atural and organic food sales for humans have been the on the rise as evidenced by top natural foods retailers such as Whole Foods and Wild Oats stores. Foods that have been grown without additives, hormones, pesticides or herbicides have piqued interest among consumers, and this trend has not only taken root in the petfood sector, but is growing at a healthy rate.

According to the Organic Trade Association (OTA), the organic and natural market for petfood is growing at a rate three times the rate of human organic food sales. The OTA also reports that organic petfood sales increased nearly 60% to US\$14 million in 2003 from the year before, and predicts a 17% sales spike each year until 2008.

## Natural, environmentally friendly

Sales of natural and environmentally friendly pet products will nearly double in the next five years and exceed US\$1 billion in the United States by 2009, according to the Market Trends report “Natural, Organic and “Eco-Friendly Pet Products.” The natural petfood segment makes up a large share of the market, totaling an estimated US\$375 million in 2004. The report says sales of natural and organic petfoods are expected to double to US\$754 million by 2009. This growth could be driven in part by the underdeveloped mass channel, the report suggested.

At approximately US\$14 million, organic petfood sales remain a tiny fraction of the domestic petfood sales at 0.09%. Organic petfood represents just 3% of dog food and 2% of the cat food market, according to a 2005

**The room for share growth is significant, given strong demand within this sector.**

— Huntley Manhertz, Jr.



report from the American Pet Product Manufacturers Association (APPMA). Therefore, the room for share growth is significant, given strong demand within this sector.

## Room for the niche player

Several niche companies are entering this segment, offering organic and natural alternatives to generic petfood. One company, Miss Autumn’s Barkery, located in Jackson, Missouri, USA, offers an “all-natural, organic gourmet biscotti that even humans can eat.” Through extensive research on the ingredients typically used in dog foods, Victoria McDowell, CEO of Miss Autumn’s Barkery, determined there was a need to offer high-quality treats at an affordable cost.

McDowell believes she has come up with a better way to feed our canine companions and started Miss Autumn’s Barkery to manufacture customized dog food to be marketed and sold in stores like Cup ‘N Cork, My Daddy’s Cheesecake and the All Natural Food retailers.

Miss Autumn’s Barkery also has a unique value proposition: It provides research services to inform you of your pet’s dietary needs and is able to help any dog that may have a medical

condition with customized organic and natural foods menus—very ingenious and unique indeed.

## Future growth in the sector

I think this segment of the market is large enough to support growth, as competitive forerunner products are already opening up the market niche, and there is a growing trend to become ecologically sensitive and responsible. Niche players need to be sensitive to product differentiation, or lack thereof, both from a product uniqueness and brand view perspective.

There is no evidence that the mindset and impetus for natural and organic products will slow down any time soon. People are increasingly demanding natural, organic and environmentally friendly products for themselves, particularly the boomers and single profile consumer—and it’s a short leap to purchasing similar types of products for their pets, so expect continued growth in this segment for some time to come. ●

*Dr. Huntley Manhertz, Jr., is a consumer product goods market researcher and an independent writer. He can be reached at Tel: +1.813.310.0237, E-mail: info@consumerlinkageresearch.com.*

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# Research Notes

## Yeast culture vs. brewer's yeast for palatability

In this study, yeast culture and brewer's dried yeast were offered to cats to determine palatability preference. Yeast culture and brewer's dry yeast were included in a 32% protein, 20% fat cat food and offered to a panel of cats on two consecutive days. Twenty adult domestic long- and short-haired cats with a median age of 6 were randomly assigned to the panel. Cats were housed at a commercial nutrition laboratory. The yeast products were added to the diets, prior to extrusion, at 1.25% of the ration dry matter. One hundred fifty grams of each ration were offered to the cats, and bowl position was reversed daily to prevent "left-right" bias.

The brewer's dry yeast was approached first on 19 of 40 occasions, but only consumed first on 10 of those 40 occasions. Total daily consumption was not statistically different between the two yeast products, with the yeast culture ration consumed an average of 22.25±13.4 g per day and the brewer's yeast ration 27.05±13.7 g per day. Cats tended to

consume more of the yeast culture ration per kg of body weight ( $P = 0.08$ ). The brewer's dry yeast ration was consumed at 5.6±2.55 g/kg of body weight and yeast culture ration at 7.58±4.24 g/kg. Additionally, the yeast culture was preferred by 11 of the 20 cats based on total consumption. Total daily consumption averaged 445.5 g for the brewer's dry yeast ration and 541 g for the yeast culture ration.

In conclusion, there was no statistical difference between intake of cat food containing brewer's dry yeast and food containing yeast culture; however, intake per kg of body weight tended to be higher for yeast culture.

Source: Jones, J.W., and Leiner, B., 2006. Comparison of yeast culture and brewer's dried yeast as palatability enhancers in dry cat food. Proceedings of the 2006 ADSA ASAS Joint Annual Meeting, Minneapolis, Minnesota, USA.

## Nutritional evaluation by NIR spectroscopy

Near infrared reflectance spectroscopy (NIRS) was used to predict the nutritional value of dog foods sold in Chile. Fifty-nine dry foods for adult

and growing dogs were collected, ground and scanned across the visible/NIR range and subsequently analyzed for dry matter (DM), crude protein (CP), crude fiber (CF), total fat, linoleic acid, gross energy (GE), metabolizable energy (ME) and several amino acids and minerals. Calibration equations were developed by modified partial least squares regression and tested by cross validation.

Standard error of cross validation ( $SE_{CV}$ ) and coefficient of determination of cross validation ( $R^2_{CV}$ ) were used to select best equations. Equations with good predicting accuracy were obtained for DM, CF, CP, GE and fat. Corresponding values for  $R^2_{CV}$  and  $SE_{CV}$  were 0.96 and 1.7 g/kg; 0.91 and 3.1 g/kg; 0.99 and 5.0 g/kg; 0.93 and 0.26 MJ/kg; and 0.89 and 12.4 g/kg. Several amino acids were also well predicted, such as arginine, leucine, isoleucine, phenylalanine-tyrosine (combined), threonine and valine, with values for  $R^2_{CV}$  and  $SE_{CV}$  (g/kg) of 0.89 and 0.9; 0.94 and 1.3; 0.91 and 0.5; 0.95 and 0.9; 0.91 and 0.5; and 0.93 and 0.5.

Intermediate values, appropriate for ranking purposes, were obtained for ME, histidine, lysine and methionine-cysteine. Tryptophan, minerals or linoleic acid were not acceptably predicted, irrespective of the mathematical treatment applied. It is concluded that NIR can be successfully used to predict important nutritional characteristics of commercial dog foods.

Source: Alomar, D., et al., 2006. Nutritional evaluation of commercial dry dog foods by near infrared reflectance spectroscopy. *J Animal Physiology and Animal Nutrition* 90(5-6):223.

## Prediction of urine pH in cats fed dry and wet foods

The objective of this study was to determine if urine pH can be predicted using the nutrient components of fe-

### ► Yeast culture vs. brewer's yeast for palatability

(ADSA ASAS Joint Annual Meeting): There was no statistical difference between intake of cat food containing brewer's dry yeast and food containing yeast culture; intake per kg of body weight tended to be higher for yeast culture.

### ► Nutritional evaluation by NIR spectroscopy

(*J Nutr* 90(5-6):223): NIR can be successfully used to predict important nutritional characteristics of commercial dog foods.

### ► Prediction of urine pH in cats fed dry and wet foods

(*Intern J Appl Res Vet Med* 4(1):58-66): Urine pH of adult cats can be predicted from the nutrient components of food, thus reducing the number of animal studies in order to optimize urine pH (for struvite and/or oxalate prevention) for specific products.

### ► Cats fed vegetarian diets, owner attitudes

(*J Am Vet Med Assoc* 229:70-73): People who fed vegetarian diets to their cats did so largely for ethical considerations. All cats evaluated had serum cobalamin concentrations within reference range, and 14 of 17 had blood taurine concentrations within reference range.

line foods. One hundred fifty foods (90 dry foods, 60 wet foods) were fed to groups of 10 adult cats (mean, 8.5 years of age) to determine the urine pH of cats fed each food. The food was fed for a period of seven days, and pH was determined on freshly voided urine on days five to seven of the test. Through step-wise regression, it was determined which cations, anions and sulfur-containing amino acids were of importance for urine pH prediction.

Three models were developed for urine pH prediction: 1) wet and dry foods; 2) wet only foods; and 3) dry only foods. The cations included in all models were sodium, potassium and magnesium. Calcium was excluded from the wet model. The anions for all models were chloride, sulfur and phosphorus. Including sulfur in the model allowed for the exclusion of methionine and cysteine from the dry model.

Urine pH of adult cats can be predicted from the nutrient components of the food, thus reducing the number of animal studies in order to optimize urine pH (for struvite and/or oxalate prevention) for specific products. Separate formulas must be used for dry and wet foods in order to maintain accuracy.

Source: Yamka, R.M., et al., 2006. The prediction of urine pH using dietary cations and anions in cats fed dry and wet foods. *Intern J Appl Res Vet Med* 4(1):58-66.

## Cats fed vegetarian diets, owner attitudes

This cross-sectional study was conducted to determine motivation and feeding practices of people who feed their cats vegetarian diets, as well as taurine and cobalamin status of cats consuming vegetarian diets. The study included 34 cats that had been exclusively fed a commercial or homemade vegetarian diet and 52 cats that had been fed a conventional diet for one year.

Participants were recruited through a website and from attendees of a national animal welfare conference. Caregivers of cats in both groups answered a telephone questionnaire regarding feeding practices for their cats. Blood was obtained from a subset of cats that had been fed vegetarian diets. Blood and plasma taurine and serum cobala-

min concentrations were measured.

People who fed vegetarian diets to their cats did so largely for ethical reasons and were more likely than people who fed conventional diets to believe there are health benefits associated with a vegetarian diet and that conventional commercial cat foods are unwholesome. Both groups were aware of potential health problems that could arise from improperly formulated vegetarian diets. All cats evaluated had serum cobalamin concentrations within reference range, and 14 of 17 had blood taurine concentrations within reference range. These results should help veterinarians provide advice to such clients.

Source: Wakefield, L.A., Shofer, F.S., and Michel, K.E., 2006. Evaluation of cats fed vegetarian diets and attitudes of their caregivers. *J Am Vet Med Assoc* 229:70-73.

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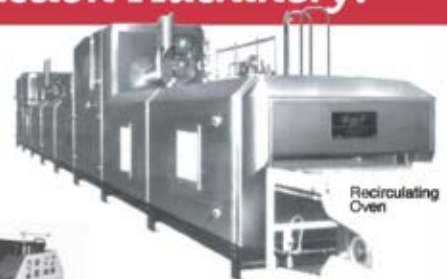
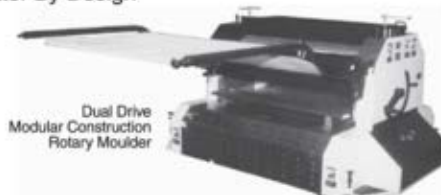


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► **National Renderers Association Annual Convention**, October 23-27, 2006, Laguna Niguel, California, USA. Contact: National Renderers Association Inc., 801 North Fairfax Street, Suite 207, Alexandria, Virginia 22314 USA, Tel: +1.703.683.0155, Fax: +1.703.683.2626, E-mail: [renderers@nationalrenderers.com](mailto:renderers@nationalrenderers.com), Website: [www.renderers.org](http://www.renderers.org).

► **Pet Food Association of Canada**, October 26-27, 2006, Vancouver, BC, Canada. Contact: PO Box 35570, 2528 Bayview Avenue, Toronto, Ontario, M2L 2J7 Canada, Tel: +1.416.447.9970, Fax: +1.416.443.9137, E-mail: [info@pfac.com](mailto:info@pfac.com), Website: [www.pfac.com](http://www.pfac.com).

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► **Private Label Manufacturers' Association (PLMA) Tradeshow**, November 12-14, 2006, Chicago, Illinois, USA. Contact: PLMA, 369 Lexington Avenue, New York, New York 10017 USA, Tel: +1.212.972.3131, Fax: +1.212.983.1382, E-mail: [info@plma.com](mailto:info@plma.com), Website: [www.plma.com](http://www.plma.com).

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► **EuroTier 2006—International DLG Exhibition**, November 14-17, 2006, Hanover, Germany. Contact: DLG, Eschborner Landstraße 122, D-60489 Frankfurt am Main, Germany, Tel: +49.69.247.880, Fax: +49.69.2478.8110, E-mail: [eurotier@dlg-frankfurt.de](mailto:eurotier@dlg-frankfurt.de) or [info@DLG.org](mailto:info@DLG.org), Website: [www.eurotier.de](http://www.eurotier.de) or [www.dlg.org](http://www.dlg.org).

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Registration Date	Petfood Forum	Petfood Focus on Treats	Petfood Focus discounted rate if also registered for Petfood Forum
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## 2007

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► **Annual Practical Short Course on Feeds & Pet Food Extrusion**, January 28-February 2, 2007, Texas A&M University, College Station, Texas, USA. Contact: Dr. Mian N. Riaz, 2476 TAMU-Food Protein R&D Center, Texas A&M University, College Station, Texas 77843-2476 USA, Tel: +1.979.845.2774, Fax: +1.979.458.0019, E-mail: mnriaz@tamu.edu, Website: www.tamu.edu/extrusion.

► **AFIA Expo/US POULTRY IPE**, January 31-February 2, 2007, Georgia World Congress Center, Atlanta, Georgia, USA. Contact: US Poultry & Egg Association, 1530 Cooleedge Road, Tucker, Georgia 30084 USA, Tel: +1.770.493.9401, Fax: +1.770.493.9257, Website: www.poultryegg.org or www.afia.org.

► **Global Pet Expo**, February 22-24, 2007, Orlando, Florida, USA. Contact: APPMA, 255 Glenville Road, Greenwich, Connecticut 06831 USA, Tel: +1.203.532.3601, Fax: +1.203.532.0551, E-mail: gpe@appma.org, Website: www.globalpetexpo.org.

► **VIV Asia**, March 7-9, 2007, Bangkok, Thailand. Contact: Richard de Boer, VNU Exhibitions Europe, PO Box 8800, 3503 RV Utrecht, Netherlands, Tel: +31.30.295.2714, Fax: +31.30.295.2809, E-mail: richard.de.boer@vnuexhibitions.com, Website: www.viv.net or www.vnuexhibitions.com.

► **NGFA Annual Convention**, March 18-20, 2007, St. Francis, San Francisco, California, USA. Contact: National Grain and Feed Association, 1250 I St. NW, Suite 1003, Washington, DC 20005 USA, Tel: +1.202.289.0873, Fax: +1.202.289.5388, E-mail: info@ngfa.org, Website: www.ngfa.org.

► **Petfood Forum**, April 16-18, 2007, Hyatt Regency O'Hare Hotel, Chicago, Illinois, USA. Contact: Marcia Riddle, Watt Publishing Co., 122 S. Wesley Avenue, Mt. Morris, Illinois 61054 USA, Fax: +1.815.734.5631, E-mail: mriddle@wattnet.net, Website: www.petfoodindustry.com.

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# Product News



## Vibratory screening machine

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## DON detection

Charm Sciences announces its ROSA Qualitative P/N kit for deoxynivalenol (DON; vomitoxin), a three-minute strip test for the detection of DON. The kit has successfully attained the USDA's Certificate of Performance with a screening choice of 1 ppm for wheat and barley, or 0.5 ppm for wheat. The rapid one-step assay (ROSA) is intended to be the fastest approved test for DON and the only approved strip test that provides a ppm reading (with optional ROSA-M reader) and the flexibility to meet domestic and export requirements.

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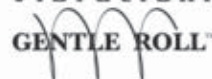
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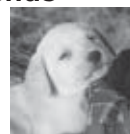
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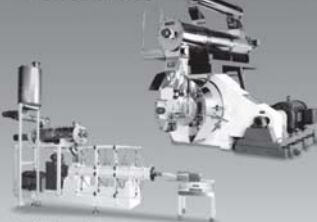
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## Connecting with consumers

“U S\$14.5 billion in pet-food sold in USA.”  
“German pet market up 2.3%.”

“UK petfood data show thriving market.”

Recent headlines from *Petfood Industry* parallel others in a variety of media describing the fast-growing global petfood market.

What’s fueling the growth? Some experts point to various categories such as premium and superpremium products, organic/natural petfoods, functional/healthy ingredients and treats.

In my mind, these spring from two key sources:

1. The ever-increasing humanization of pets.
2. Rapid R&D, leading to an explosion of new products.

These in turn point to consumer interest, even frenzy, as the driver of growth.

### Full family members

Though I’ve been with *Petfood Industry* only a short time, my career includes 13 years of editing and writing for other pet-related publications, mainly for consumers. In this regular column, I hope to add another dimension to the occasional consumer perspective we provide in the magazine and related media.

Besides a background in pet publishing, my qualifications include my daily role as chief servant for my family’s 17-year-old cat, Marley. (Lest you think I’m biased, I grew up with dogs and an assortment of hamsters and guinea pigs, plus the occasional frog, turtle or bird my siblings and I “rescued” from the outdoors).

My devotion—some would say

It all adds up to a lot of growth and a lot of fun for everyone in the industry.

— Debbie Phillips-Donaldson



indenture—to my cat is not unique, of course. It’s just one example of a phenomenon that has been spreading across the United States, Europe and other regions, making its way around the world: Pets are increasingly becoming full members of the family, as well cared for as any human child.

In maturing markets, this translates into higher spending on petfoods, especially products featuring premium, organic or natural ingredients and ones designed to address specific health conditions. According to the US Bureau of Labor, average annual US household spending on petfood increased 45.5% from 1994 to 2004, from US\$75.80 to US\$110.31 a year.

In developing markets, such as China, the number of pet owners is growing quickly. As their purchasing power increases, these consumers are predicted to spend more on pet supplies, including food.

### Feeding a fever

This rise in pet ownership and spending around the world creates a demand that savvy petfood manufacturers and marketers know how to supply. The first six months of this year saw 175 new cat and dog food products, including line extensions. That represented 844 SKUs, nearly matching the

total for all of 2005, according to Data-monitor’s Productscan Online.

The new product fever doesn’t just involve retail goods; it also trickles down to, and is simultaneously fed by, new offerings from suppliers to the industry. To respond to consumer needs and wants, manufacturers turn to their suppliers to help them create specific product features or ingredients. At the same time, supplier innovations are fueling new product development. A current example is the rash of revolutionary new petfood packaging, often aided by groundbreaking production methods and materials.

It all adds up to a lot of growth and a lot of fun for everyone in the industry. *Petfood Industry’s* role is to report on that growth and provide information and knowledge to help you determine how your organization can contribute to and share in it. In addition to the magazine, we do this through our electronic media and our events: Petfood Forum, Petfood Focus on Treats and Petfood Forum Europe, next scheduled for spring 2007. For more information and to subscribe to our free E-newsletters, visit [www.petfoodindustry.com](http://www.petfoodindustry.com). ●

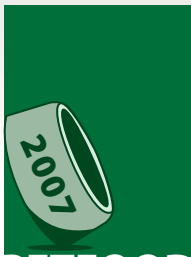
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