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Petfood Industry

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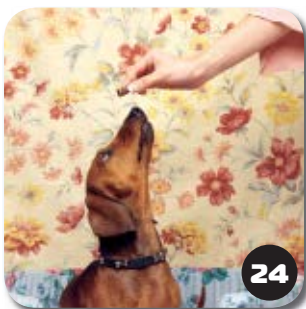
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Branding vs. selling

Marketing is brand building. Conventional marketing is based on selling, when it should be based on branding, contends author Laura Ries (*The 22 Immutable Laws of Branding*). “Marketing is not selling,” she says. “Marketing is building a brand in the mind of the prospect.”

Reis thinks that if you can build a powerful brand, you will have built a powerful marketing program. If you can't, then no amount of clever advertising, elaborate packaging, sales promotion, websites and public relations will get you to your objective. Branding pre-sells the product or service to the user. Bottom line, it is a more efficient way to sell things.

What's your brand?

Enough theoretical preaching, let's talk about petfood brands. I think there used to be three major brand areas, but now there are four.

- ▶ Top-quality, customized nutrition;
- ▶ Best tasting;
- ▶ Low price;
- ▶ Human-edible food for pets—the relatively new territory.

Here are some examples of how various successful brands communicate their position.

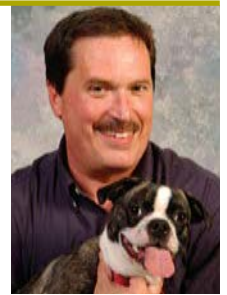
Top-quality nutrition.

Brand Packaging notes that Hill's Science Diet packaging has a clean design and clear language. The product name reflects the benefit. The red Science Diet logo is combined with a blue medallion. It features the phrase “veterinarian recommended,”



7 Branding is a more efficient way to sell things.

— Tim Phillips



which gains the pet owner's trust.

Best tasting. The package for 9 Lives cat food emphasizes the brand's tagline “the taste cats crave.” The logo and the famous face of Morris the Cat grace the front of the package for each flavor and formula. Flavor is the key benefit.

The Mars' Pedigree package features the Pedigree logo, which has a blue-ribbon icon accompanied by the brand's tagline, “developed with vets.” The bottom half of the package has flavor claims and product photography. Quality and taste get equal billing.

Low price. Low-priced brands tend to look low priced, but some do quite well, especially in emerging markets. An increasing preference for more expensive products has taken a toll on economy and mid-priced brands in mature markets. Over the next four years, Euromonitor forecasts premium dog and cat foods will enjoy double the growth rate of mid-priced and economy products.

Human-edible food for pets. Several petfood manufacturers are emphasizing healthy and gourmet meals that are good enough for pet own-

ers to eat. Nestle Purina describes Beneful wet dog food as “family-style” meals made with “real, wholesome ingredients.” The food comes in a clear plastic ready-to-serve container that's designed to make the stewlike contents look appealing to pet owners. Among others, Natural Balance, Merrick and Evanger's are also stressing brands that are “human-grade.”

Brand equity

The market research firm DDS calls a brand, “a promise made to its customers.” Promises that are kept yield loyal customers and steady streams of profits. DDS maintains that brand equity is built by laying a foundation of brand awareness, forming positive brand images and developing high levels of brand loyalty.

Leveraging brand loyalty is the goal. Pamela Batalis of Brand Keys puts it this way: “For the foreseeable future, leveraging customer loyalty will be the primary means by which the most competitive companies will break away from the pack.” ●

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

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Industry News

New content, location for Petfood Forum Europe

Petfood Forum Europe 2007 has a fresh format and a new location. The symposium will be held in association with Victam International, so Petfood Forum Europe exhibitors can now be located within the Victam trade show. The event will take place May 8 at Jaarbeurs Halls, Utrecht, Netherlands.

Petfood Forum Europe 2007 will include the following topics:

- ▶ New and functional/healthy ingredients;
- ▶ European sales trends;
- ▶ A debate covering nutrition and longevity;
- ▶ Advances in palatability testing;
- ▶ Niche markets; and
- ▶ Production innovations.

For details and to register, go to www.wattnet.com/petfoodforum or E-mail Marcia Riddle at mriddle@wattnet.net. To find out more about Victam International and available hotels, visit www.victam.com.

Aquafeed Horizons at Victam International 2007

Scientists from Fiskeriforskning Department of Aquafeed Development and Marine Processing in Bergen, Norway, will join experts from industry to examine the latest concepts in feed development for aquatic species, cutting-edge aquafeed technologies and developments in aquaculture markets. The



event, Aquafeed Horizons, will provide feed companies and their suppliers with insights into the needs of aquaculture and the possibilities offered by advances in aquafeed technology and formulation.

Aquafeed Horizons will take place May 9-10 at Jaarbeurs Halls, Utrecht, Netherlands, as part of Victam International 2007. For more information, contact editor@aquafeed.com or visit www.aquafeed.com. For information about Fiskeriforskning Department of Aquafeed Development and Marine Processing, contact Department Head Ola Fleskland at ola.fleskland@fiskeriforskning.no, or visit www.fiskeriforskning.no.



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JIM MANN, B.S. CHEMISTRY

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*After hurricanes devastated the U.S. fishmeal industry,
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When hurricanes battered the Gulf Coast in 2005, the menhaden fish supply chain for

petfood companies was gone. Kemin scientist Jim Mann and his Technisales team literally flew into action to assist in the set-up, qualifications and validation of new non-domestic fishmeal suppliers. Within just four weeks, the supply chain was reconstructed and Kemin customers were blown away by the superhuman effort.

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Mountain Country Foods to produce organic treats

Mountain Country Pet Care recently received certification to produce organic baked pet treats at its manufacturing facility in Okeene, Oklahoma, USA, by meeting the organic standards established by the USDA National Organic

Program. Mountain Country Foods, as it is also known, is a custom pet treat manufacturer serving both the soft and baked treat sectors of the industry. Baked treats are produced at the Oklahoma facility, while soft treats are produced at the Spanish Fork, Utah, USA, facility.

The new organic certification,

along with the expanded capacity at the Oklahoma plant, gives Mountain Country Foods the ability to serve customers who want to expand into new markets. For more information about organic, natural or traditional baked pet treat production, contact Matt Dixon at +1.580.822.4130.

Joep Luggens, DVM, dies

Following a period of illness, Joep Luggens, DVM, died October 4. Dr. Luggens was a respected veterinarian and past speaker at Petfood Forum, Petfood Focus and Petfood Forum Europe. He wrote several articles for *Petfood Industry* as well as a chapter for the *Petfood Technology* text. He was a consultant to the industry on matters of regulation through his company, A Consult with the flexvet (www.aconsult.info).



An advertisement for Chantland MHS. The background is a blue grid. At the top left is the Chantland MHS logo, which consists of a stylized white 'C' inside a circle. To the right of the logo, the text 'CHANTLAND' is written in large, bold, white capital letters, with 'MHS' in smaller white capital letters below it. Underneath, 'Material Handling Solutions' is written in a smaller white font. Below that, 'BAG FILLERS • CONVEYERS • PALLETIZERS • SYSTEMS' is written in white. In the center, there is a photograph of a black and tan Rottweiler dog sitting and looking to the right. Surrounding the dog are several pieces of industrial equipment, including a white robotic arm, a blue conveyor system, and a blue bag filling machine. A white cursive signature 'Since 1943' is written over the equipment. At the bottom, there is a white text box with the following text: 'Design, manufacture, system integration and technical support of Robotic and Conventional Bag Palletizers; Bag Filling Equipment; Bulk Product Conveyors and Specialty Bag Handling Conveyors.' Below this text box, the website 'WWW.CHANTLAND.COM' is written in large, bold, white capital letters. Underneath the website, 'EXPERIENCE • QUALITY • VALUE' is written in smaller white capital letters. At the very bottom, the phone number 'PHONE: 515.332.4045' and fax number 'FAX: 515.332.1502' are written in white capital letters.

Chomp hires new SVP of sales

Chomp Inc. announced recently that it has appointed Bill Englehart to the position of senior VP of sales to oversee the sales growth and distribution of Chomp's expanding line of pet products. Englehart has more than 25 years of consumer products sales and management experience, most recently as VP sales for both Companion Pet Products and Harper Pet Products. During his selling career, Englehart has represented the Duracell, Gillette, Parker, Shaeffer and Bic brands in addition to his pet-related experience. He replaces Jack Drasner, sales SVP at Chomp since 2000, who left to restart his former pet sales consulting firm, PRISM Sales.

Practical short course on petfood extrusion

A one-week Practical Short Course on Feeds & Pet Food Extrusion will be presented January 28-February 2, 2007, at Texas A&M University by staff, industry representatives and

consultants. The program will offer information on designing new feed mills and selecting conveying, drying, grinding, conditioning and feed mixing equipment. Other topics for review include current practices for production of petfoods; preparing full-fat soy meal; recycling fisheries by-products, raw animal products and secondary resources; extrusion of floating, sinking and high-fat feeds; spraying and coating fats, digests and preservatives; use of encapsulated ingredients and preparation of premixes; and least-cost formulation.

For more information, contact: Dr. Mian N. Riaz, Texas A&M University, Tel: +1.979.845.2774, E-mail: mnriaz@tamu.edu, Website: www.tamu.edu/extrusion.

WATT names *Petfood Industry* publisher



Steve Akins joined Watt Publishing Co. recently as publisher of *Petfood Industry* magazine, responsible for domestic sales and sales management of the *Petfood Industry* franchise. Prior to joining WATT, Akins was associate publisher of two publications in the fire and rescue market. In addition, Akins held sales and sales management positions at Bill Communications, Crain and Verticalnet. He brings extensive experience in creating and selling internet media, print and in-person events.

Grant boosts Cambrian Pet Foods capacity

A Welsh petfood manufacturer is expected to create 35 jobs and significantly increase turnover as a result of winning £1m in grant aid. Family-run Cambrian Pet Foods, best known for its Gelert Pet Nutrition, has secured the funding from the Assembly Government through Venture Wales to develop a second high-tech manufacturing plant in Carmarthenshire.

The company has now turned its attention to developing a comparable petfood canning operation in Llangadog. The new 48,000-sq.-ft. facility is to be located on the site of the former Llangadog Creamery. It is due to open in June 2007.

Within two years, the company hopes to be operating at full capacity

in both dry and wet petfoods, branching out into specialty market petfood production. The company is also making longer-term plans to develop the creamery site, which has already been designated as the Tywi Valley Food Park, and is home to an additional 50 jobs in the area.

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Sugar substitute dangerous to dogs?

There is now further clinical evidence of an association between the sugar substitute xylitol and possible liver failure in dogs. A clinical report in the Oct. 1 issue of the *Journal of the American Veterinary Medical Association* discusses the sometimes-fatal conditions developed by dogs that have ingested the naturally occurring sweetener found in many sugar-free products.

According to the report, eight dogs were treated between 2003 and 2005 after eating products containing xylitol. Each dog became ill, and while three of the dogs survived, five of the pets either died or had to be euthanized because of liver failure possibly stemming from xylitol ingestion. Reported xylitol exposures have climbed from 70 in 2004 to 170 in 2005.

MAF offers sponsorship opportunities

Morris Animal Foundation (MAF) has published its 2007 listing of 101 animal research studies available for sponsorship. Individuals or groups are invited to sponsor or co-sponsor with a total gift of US\$3,000 or more per study. Projects address the health and well-being of dogs, cats, horses, llamas/alpacas and wildlife. The complete list of research studies can be viewed at www.morrisanimalfoundation.org.

To discuss the details on any study, or for information on study sponsorship, contact Tobie McPhail at tmcphail@morrisanimalfoundation.org or call +1.800.243.2345.



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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)

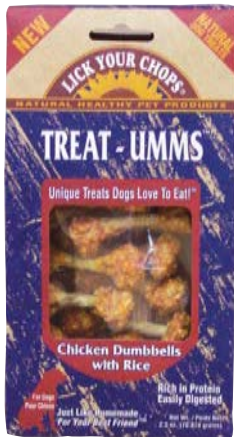
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New on the Shelves

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



Treat-Umms dog treats

Treat-Umms dog treats are the latest additions to the Lick Your Chops family of natural pet products at Healthy Pet Foods Inc. The handmade treats use only natural ingredients including chicken breast, sweet potato, cheese, crab, liver and cod fish. They come in unique shapes like dumbbells, strips and wraps. www.healthypetfoodsinc.com

Lassie's Natural Way dog food

One of the world's best-known pets is helping launch a new dog food line. Lassie Natural Way is available exclusively in 6,000+ grocery locations. The dog foods were developed to fulfill the promise of easily digestible, palatable, complete nutrition from natural formulations. The company's recipes include chicken meal and natural flavors, colors and preservatives. www.lassie.com/naturalway



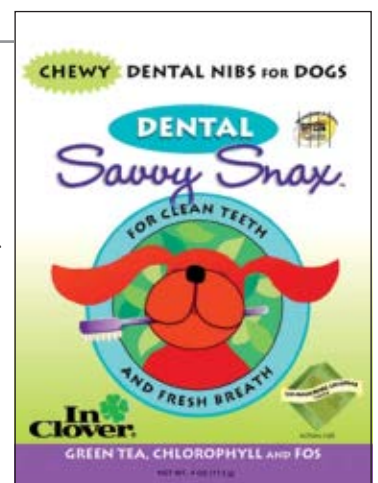
Dad's Nut-tastics soft and chewy treat

Nut-tastics from Dad's Pet Care are soft, chewy treats that give dogs the peanut butter flavor they love without the mess. They are available in regular and mini sizes in a convenient, recognizable peanut butter jar. www.dadstreats.com

Correction: American Health Kennels In the August and September issues of *Petfood Industry* magazine, the incorrect website was listed for products from American Health Kennels. Contact American Health Kennels for information on its Bark Bars or Animal Snackers at www.americanhealthkennels.com.

Savvy Snax dental treats reduce tartar

In Clover introduces its Savvy Snax line of pet treats. Savvy Snax Chewy Dental Nibs are designed to reduce bad breath and tarter by attacking all three causes of bad breath: bacteria that cause tarter, build-up of toxic bacteria in the gut and acute bad breath. Savvy Snax contain no animal fat, refined sugar or artificial flavors or preservatives. www.inclover.com



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Mars leverages its human resources to boost its bottom line

BY JENNY KVAMME, DVM,
AND TIM PHILLIPS, DVM

When Mars Inc. acquired Doane Pet Care Enterprises Inc. in June from Teachers' Private Capital, the executives at Mars were very impressed with Doane's culture, according to Doug Cahill, now president of the new Mars Petcare US. So impressed, in fact, that Mars has decided to use a leadership program employed by Doane called Getting Results Through People (GRTP) as a tool for further integrating the cultures of the former Doane Pet Care organization with the former Masterfoods Pet Division organization.

Mars will roll out the GRTP culture integration this month to ensure its latest acquisition has the foundation for building a new culture based on the five principles of Mars: quality, responsibility, mutuality, efficiency and freedom.

Core values established early

Before the Mars acquisition, Cahill was Doane's president. Brentwood, Tennessee, USA-based Doane was known as the world's largest private label petfood supplier. It manufactured a full range of petfood products for dogs and cats—including dry/soft-dry, treats and dog biscuits. One of its biggest customers, Wal-Mart, sold the company's products under the Ol' Roy label. (The acquisition did not include Doane's European business, which was sold to a third party.)

In years prior to the acquisition, Doane went through many mergers of various petfood organizations. These mergers emphasized the need for Doane to create a new culture of its

own. It undertook an exercise whose purpose was to:

- ▶ Consolidate different cultures into a culture for organizational growth;
- ▶ Develop technical managers into strong leaders;
- ▶ Develop a communication language that all associates could embrace;
- ▶ Create a model for handling potential conflicts as cultures emerged.

This culture was to be based on the four core values of integrity, accountability, commitment to team success over individual success and trust and respect for the individual ("I ACT"). Doane's management team believed that just designating the core values was not enough. They needed a tool that could help them unite the strengths of their associates and help them learn how to live the core values. The act of living the core values was essential to organizational success, according to Cahill.

To aid the process, Doane consulted with a company that specializes in this type of project—Xcologic Inc. Senior



LEFT: President Doug Cahill meets with Mars Petcare US associates. ABOVE: All the company's associates are involved in GRTP.

What is GRTP?

Xcelogic developed the Getting Results Through People (GRTP) system to help businesses make the most of their investments in people and technology. The GRTP system is typically implemented in conjunction with business performance consulting to identify, analyze, measure and eliminate process application gaps (PAGs)—that space between documented processes and process application. Simply put, a PAG is the gap between the way a process is designed to get done and the way it actually gets done.

According to Xcelogic, PAGs are misunderstood because they are often invisible and hard to grasp, yet they hold the greatest source of potential financial gain. The GRTP system was designed to minimize and eliminate application gaps and provide accelerated growth and profits, Xcelogic says. The two most important pieces needed to eliminate PAGs are a shared perception with a common language and established accountabilities. Together, they build a platform that will drastically reduce inconsistent employee performance.

Xcelogic states that using the GRTP system allows everyone in the company to work from a single, objective standpoint instead of from their own subjective perception. For more information on this system, visit www.xcelogic.com.

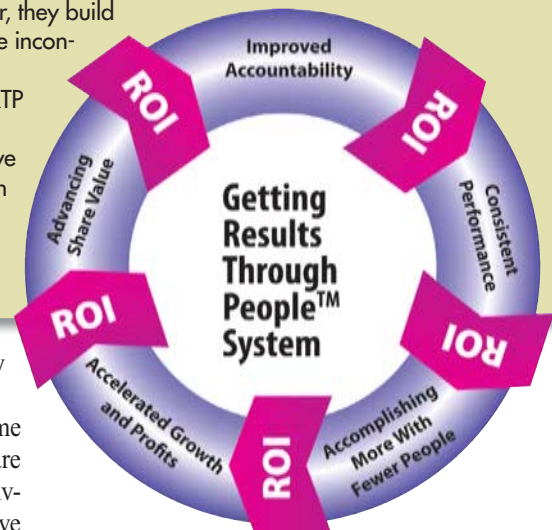
management from Doane was invited to attend an open program (along with executives from various other companies) to determine if Xcelogic's GRTP program was a match for their leadership development needs and merging cultures. Doane's VP of people and VP of manufacturing participated in the two-day GRTP program and discovered that Xcelogic had the right system for helping them meet their organization's objectives.

In spring 2000, Doane launched a series of training sessions over six to nine months for members of upper management, middle management, sales, customer service and key influencers throughout the business. To this day, the company continues the program that now includes front-line supervisors and associates.

All of the company's associates, from the corporate location in Brentwood to its network of 20 manufacturing plants, are involved in the GRTP program. In addition to the initial program, follow-up and refresher sessions

are provided for all leaders and key people throughout the company.

Cahill notes that GRTP has become a part of the company culture. "We are a company that knows the value of living our core values. It is a competitive strength. We are continuously improving in the areas of customer service, quality, safety, leadership, team building, communication and productivity. Our people are our greatest asset," he said.



It's about balance

GRTP is about balance—it promotes balance between the people and the operation of the business. It teaches

leaders how to “build their leadership skills by balancing the multitude of processes within the petfood industry, as well as instilling higher levels of productivity with the people they lead,” said Cahill.

This results in all associates increasing their leadership abilities by utilizing the organization’s core values while achieving their daily priorities. GRTP merges cultures, managers and employees, shifts and departments to create a learning organization where people flourish, contends Cahill.

Cahill notes that GRTP has everything to do with making quality petfood. He said that at Mars Petcare US employees feel valued, the work environment is safe and communication between associates (the experts) flows freely. When people feel as though they are a part of the business, the company can:

- ▶ Develop a united team of experts;
- ▶ Nurture people who are more efficient at producing more product;
- ▶ Grow people internally to handle in-

Cahill notes that GRTP has everything to do with making quality petfood.

- creasing levels of responsibility;
- ▶ Solve problems at the lowest level possible;
- ▶ Allow uncommitted people to transition out of the organization;
- ▶ Turn unprofitable plants into profitable plants.

What’s the payoff?

The payoff from this people investment continues to produce bottom-line results for Mars today. From the GRTP learning experience, Cahill has seen people who were very new to manage-

ment develop into great leaders. He has also seen senior managers who were stuck with “old school” management skills become leaders focused on their people.

Cahill noted that the outcome from this leadership training experience has resulted in:

- ▶ A reduction in labor and production costs;
- ▶ Implementation of safety and quality initiatives;
- ▶ Greater employee retention (key members) throughout the organization;
- ▶ A strong team of regional and plant managers;
- ▶ Enhanced communication and morale within the organization’s culture;
- ▶ Measurable increases in individual and team productivity.

From the long list of GRTP benefits, it is clear the program has had and will continue to have an excellent return on investment. ●

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Unicharm cashes in on

Focusing on changes in the Japanese pet market leads to high-value, high-margin products

BY MIKE PEHANICH

Tapping opportunity in pet trends has been the ticket to success for Japanese specialty petfood manufacturer Unicharm PetCare Corp., a division of Tokyo-based Unicharm Corp.

Unicharm's high-value, high-margin products target special needs of an evolving Japanese pet market and have enabled it to nearly double petfood

sales since its inception in 1986 to 19 billion yen (US\$162 million) in 2005. Over the past two years, the success of Unicharm's specialty products have made it the most dynamic petfood brand in Japan and the largest Japanese-owned marketer of petfoods, trailing only global giants Mars Inc. and Nestlé SA in overall market share in Japan. Coupled with its dominant share of the pet toiletry business, Unicharm has built a formidable pet product business that tallies 30 billion yen (US\$255 million) in sales annually—entirely from domestic sales.

“Most of our products are specialty items addressing the needs of Japanese pets and pet owners,” says Shogo Sanjo, general manager, business planning, Unicharm PetCare.

The proof of this strategy comes in the company's 29% share of petfoods targeted at small dogs, a 43% share of the market for senior dogs and a 33% share of products geared to

overweight dogs. Its cat products have seized market share as well.

Pet parade

Cats and dogs have been reigning in Japan for the past decade. The Japan Pet Products Manufacturers Association estimates there were 13.1 million dogs and 12.1 million cats in Japan in 2005, with the numbers climbing as pet ownership opportunities increase. Pets are filling the companionship void of more and more single people and aging couples and getting the practically part-of-the-family treatment.

Led by Chairman Toshio Takahara and Gumpei Futagami, president and CEO, Unicharm PetCare has taken a two-pronged approach to its corporate mission of “providing pets with a healthy, clean and comfortable life.” That approach encompasses pet toiletries and foods, the latter under the successful Genki and Gaines brands. The company has introduced 20 new products since 2003.

Responding to the market

Unicharm has used a three-part strategy to advance what its executives refer to as “the pets and people together

Business basics

World headquarters: Tokyo

Annual sales: US\$255 million (approx. 2005 global retail total)

Officers: Toshio Takahara, chairman; Gumpei Futagami, president/CEO

Top brands: Aiken Genki Gin no Sara; Neko-Genki Silver Spoon

Website: www.uc-petcare.co.jp

Plant locations: Itami Hyogo (petfoods) and Mie (pet care products)

Employees: 180



Specialty products like Aiken Genki Dry for small dogs cater to Japanese pet owners, who often live in apartments.



Led by president and CEO Gumppei Futagami, Unicharm PetCare has introduced 20 new products since 2003.

lifestyle.” That strategy consists of creating market awareness, carefully researching pet health and marketing more palatable petfood products.

Shifting social and demographic trends of a maturing and economically developed nation have been the dominant influence on this course. For the past 20 years, Unicharm has tracked these trends closely and focused on four dominant ones:

1. Indoor pets.
2. Small dogs.
3. An aging pet population.
4. Overweight dogs.

Indoor pets. Dogs in particular are becoming predominantly indoor companions. “In 1996, 52% of dogs in Japan were indoor pets,” notes Sanjo. “In 2005, 78% of dogs were living indoors, our research shows.” A 2004 study of the Japan Pet Food Manufacturers Association found that 60% of Japan’s dogs and cats were living indoors, up from 50% only a year earlier.

Widespread changes in apartment management philosophy have also contributed to the pet boom. In 1998, only 1% of apartments in the Tokyo metropolitan area permitted pets. In

Over the past two years, the success of Unicharm’s specialty products have made it the most dynamic petfood brand in Japan.

2005, 64% of new apartments in the same area allowed tenants to have pets, Sanjo notes.

Pets moving indoors have had two significant consequences: Fewer dogs are being killed by cars, and more pets are eating petfood instead of table scraps. According to Sanjo, this dietary shift is also extending the longevity of pets. “Petfood is better for the health of dogs and cats,” he says.

As indoor pets become close companions, owners often deem them worthy of special treatment.

In response, Unicharm has launched upscale products like Neko-Genki Ginno (Silver) Spoon, a premium cat food, that have taken the market by storm.

“Neko-Genki Silver Spoon is our bestselling cat food, a gourmet dry food,” says Sanjo. “Cats find it highly palatable.” The product has already captured a 32% share of the gourmet cat food market segment in Japan.

“We launched Silver Spoon in February 2004,” explains Yasushi Takeda, group manager, research and development, petfoods. “But the market share is already 8% of the total dry cat food market. Silver Spoon is the fastest-growing product in the Japanese petfood market.”

Another strong seller, Neko Genko Dry Kedama Care for hairball control, addresses a problem using a gourmet presentation. “There are many hairball control foods in Japan, but cats don’t like to eat them,” says Sanjo. “Cats find our product very palatable.”

Small dogs. As owners opt for indoor pets, they are apt to choose smaller dog breeds such as Miniature Dachshunds, Chihuahuas, Shih Tzus, Toy Poodles and Papillons. In Japan,

where homes and apartments can be very tight quarters, small dogs climbed from 32% of the canine pet population in 1996 to nearly half—47%—in 2005, according to Unicharm research. “These are mostly Miniature Dachshunds and Chihuahuas,” says Sanjo. “Eight of the top 10 dogs bought today are small dogs.”

That’s why Unicharm introduced Aiken Genki Dry food, a premium product for small dogs more than 7 years old, thus addressing another trend.

Aging pet population. With better nutrition and fewer outdoor pets dodging traffic, more Japanese pets are living to a ripe old age. In 1996, 36% of the pet population reached the age of 7, according to Unicharm surveys. In 2005, that figure increased to 44%.

Besides Aiken Genki Dry, other Unicharm products targeted to senior pets include Aiken Genki for dogs 11 years and older, Gaines Pakkun for dogs 11 years and older and Neko Genki for cats 11 years and older. Another offering is Aiken

To appeal to Japanese pet owners today, Unicharm has created upscale products like Neko-Genki Ginno (Silver) Spoon, which has captured a 32% share of the gourmet cat food market in Japan in less than two years.



Why pets are booming in Japan

Pet ownership is on the rise in Japan. At both ends of the adult age spectrum, Japanese are living alone, and pets make ideal, compact companions. Four factors accounting for the phenomenon are:

Declining birth rate. Japan’s fertility rate slipped to 1.25 in 2005, one of the lowest in the industrialized world.

Aging population. Twenty percent of Japan’s population is over the age of 65.

Postponed marriages. Japanese men and women are marrying later in life and, thus, having children later, too.

Apartments permitting pet ownership. In 2005, 64% of all new apartments in metropolitan areas of Japan allowed tenants to keep pets—a significant leap from the 1% permitting pets in 1998.

Leading petfood companies in Japan (dog and cat food)

	Market share		Ranking	
	2000	2004	2000	2004
Mars Inc.	22.8	20.6	1	1
Nestlé SA	10.6	8.7	2	2
Unicharm Corp.	7.2	8.4	3	3
Colgate-Palmolive Co.	6.3	6.8	4	4
Nisshin Flour Milling Co. Ltd.	5	5.8	6	5
Nippon Pet Food Ltd.	5.9	5.2	5	6
Procter & Gamble Co.	2.8	4.6	10	7
Sunrise Co. Ltd.	4.5	4.5	7	8
Maruha Corp.	3.7	4	8	9
Pet Line Corp.	3.3	2.7	9	10

Genki Ha no Kenko Biscuit, a product aimed at keeping canine teeth healthy, particularly as dogs age.

Overweight dogs. Keeping pets indoors may make them safer but also less likely to get enough exercise. Unicharm found only 14% of the Japanese dog population to be overweight in

1996; by 2005, the figure had doubled to 28%. “Dogs are not getting enough exercise being housebound,” says Sanjo. “And this is a bigger problem for Japanese pets than those living in Europe and the US. Japanese houses are significantly smaller, so there is less room for pets to move about.”

Thus, many of the Unicharm products aimed at older pets are also intended for overweight animals.

Dominant in key segments

Unicharm has steadfastly pursued the markets for these select specialty products. Futagami has emphasized the growth opportunities available as Japan’s shrinking population ages and has increased marketing investment, particularly in television advertising, to cash in on them.

The company’s high-quality products deliver high value to pets and pet owners, and they have merited their premium price tags. Their success to date is reflected in the leading market positions of the Unicharm products, including those in its pet toiletry business. All are becoming integral parts of the pets and people together lifestyle. ●

Mike Pehanich is a freelance writer based in Westchester, Illinois, USA.

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The US Petfood Report

The primary market driver in the US continues to be conversion to higher-priced petfoods

BY DAVID LUMMIS

Higher prices rather than volume increases continue to drive retail dollar sales gains in the US petfood market. There is strong consumer demand for premium products across all categories. Upscale petfoods cover all bases—natural/organic, fortified/functional, weight control, lifestage, breed-/size-specific, gourmet—and are increasingly showing up not just as human style but as “human grade.” In fact, the number one package claim during the first half of 2006, according to Datamonitor’s Productscan Online, was “upscale” (appearing on 94 new products).

Other top claims included “high vitamins” and/or “high minerals” (96) and, of course, “natural” (90). Trumpeting the progress of premium petfoods, US households earning more than US\$70,000 annually now account for almost half of all consumer spending on petfood in the US, up dramatically from just 15% in 1994.

The big picture

US retail sales of petfood totaled US\$14.5 billion in 2005, growing 4.4% that year and reflecting a 2001-2005 compound annual growth rate (CAGR) of 5.4%. Following are percentages of total US petfood sales by species:

- Dog food 60%;
- Cat food 34%;
- Other petfood 6%.

By form, US petfood sales percentages through IRI-tracked outlets are:

- Dry food 56%;
- Wet food 30%;
- Biscuits/treats 14%.

Mass merchandisers have assumed the lead among petfood retailers, claiming 34% of sales in 2005, whereas supermarkets have continued to decline, to just 26%. Expansion by PetSmart and Petco, with combined 2005 sales of US\$5.4 billion, has resulted in a slight share gain for the pet specialty sector, albeit mostly offset by declining sales among independents. On the mass-



market side, Wal-Mart and Target have identified pet supplies as a key growth category, revamping departments and introducing upscale natural and private label products.

Although hundreds of companies market petfood and treats in the United States, 75% of the business goes to a few huge marketers focusing on dogs and cats. Nestlé Purina continues to dominate the US market with an estimated 32% share of sales as of July 2006.

Four other companies claim shares in the 10% range—Mars, Iams (Procter & Gamble), Hill’s Pet Nutrition (Colgate-Palmolive) and Del Monte—with the latter joining the group via its 2006 acquisitions of the Milk-Bone line from Kraft and of Meow Mix from Cyprus Group. During 2005, leading petfood marketers spent nearly US\$300 million on consumer advertising, with PetSmart and Petco kicking in another US\$57 million.

Pet population trends

In its 2005-2006 *National Pet Owners Survey*, the American Pet Products Manufacturers Association reports that the percentage of US households owning pets is at its highest level ever, with 63% of US households—numbering 69.1 million—having a pet in 2004, up 7.6% from 64.2 million in 2002. Much of this growth is coming from a rise in the

Cat food trends

US retail sales of cat food totaled US\$4.9 billion in 2005, up from US\$4.1 billion in 2001, and with annual sales gains averaging 5.1% forecast through 2010. Variety and gourmet flavors continue to proliferate, with the products increasingly trending toward more human-style fare. Also, as in dog food, while natural and organic products continue to be mainly the domain of pet specialty marketers, mass marketers are now beginning to tap into this trend.

Other petfood trends

US retail sales of other (non-dog/cat) petfood reached US\$869 million in 2005, up from US\$821 million in 2001. Bird food (including wild bird food) accounted for 43% of 2005 sales, followed by fish food at 33%, small animal food at 17% and reptile food at 7%.

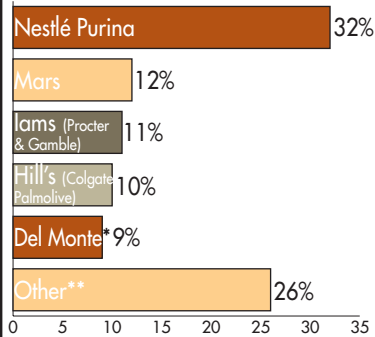
Looking ahead

The conversion of US consumers to higher-priced petfoods will continue as the primary market driver for the foreseeable future. Echoing human trends, this will mean ever healthier fare with increasingly targeted benefits, more convenient products (especially pre-portioned and resealable) and gourmet/luxury foods and treats keying in to pet owners' desire to pamper their pets. At the forefront of the premium product thrust will be natural and organic products, whose sales are expected to top the US\$1 billion mark by 2010.

We also predict a shift back toward wet foods in new and more upscale package formats, as can be seen in recent entries from Purina (Beneful Prepared Meals dog food) and Meow Mix (Market Select cat food), as well as the emergence of a new fresh petfoods niche designed to mirror, both in packaging and in formulation, fresh foods for people. ●

David Lummis is the lead pet market analyst for Packaged Facts. Contact Packaged Facts at Tel:+1.240.747.3000; E-mail: editor@packagedfacts.com; Web-site: www.packagedfacts.com.

Top five marketers



*Including Milk-Bone and Meow Mix.

**Including private-label.

Source: Packaged Facts

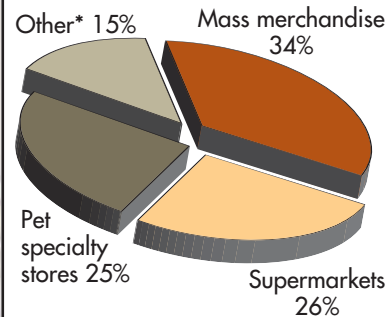
Top five US marketers of petfood as of July 2006.

number of pets per household, with the percentage of households keeping two dogs increasing from 7.9% in 2003 to 9.3% in 2005 and the percentage keeping two cats going from 6.4% to 7.9%, according to Simmons Market Research Bureau consumer survey data.

Perhaps even more important than this overall growth is the rising number of senior pets, due to better veterinary care and pet owners' desire to keep their pets healthy. Moreover, longer lives for pets mean deeper emotional bonds between pets and their keepers, and thus an even greater willingness among pet owners to invest in higher-quality foods. Almost half of all dogs and cats are 6 or more years old, and this is very good news for premium-priced foods, nutraceuticals and supplements designed to increase longevity.

Among the most important premium petfood demographics are couples without children, including DINK (dual-income, no kids) couples and older "empty nest" couples, which are growing in number. The percentage of two-adult households without kids who own dogs or cats rose from 48.8% in 2003 to 55.5% in 2005, while all households without kids increased their share from 58.0% to 63.2%. People without children are understandably more likely to purchase more expensive pet products and services, since not having children frees up discretionary time and income.

Retail outlet shares



*Includes far/feed stores, professional channels (e.g. veterinarians, boarding kennels, grooming salons), direct sales/Internet, and drugstores.

Source: Packaged Facts

Share of US petfood sales by retail outlet type, 2005.

Dog food trends

US retail sales of dog food totaled US\$8.7 billion in 2005, up from US\$6.8 billion in 2001 and reflecting a CAGR of 6.3%. Viewing ongoing product up-scaling as the primary market driver, we forecast annual gains averaging 6.1% through 2010.

Almost half of all dogs and cats are 6 or more years old.

More dog food SKUs (including various flavors, sizes and packaging) appeared during the first six months of 2006 than in all of 2005, at 743 and 696, respectively, and almost as many new products (148 vs. 158). Health-related products continue to spearhead the premium product thrust, including natural/organic, functional/nutrient enhanced and special diet (lifestage, weight, health condition and breed). While the big push a year or two ago was toward human-style novelty-type foods for dogs (pizzas, candy, etc.), the emphasis has since shifted toward human-grade fare, often overlapping with natural/organic.

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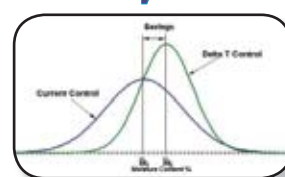


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Preventing feline kidney disease

A low dietary phosphorus level is likely to help avert renal disease in cats

BY ANTON C. BEYNEN, PHD

Chronic renal failure (CRF) is a common clinical condition in cats. Its prevalence is 30% in animals more than 15 years old. Clearly, preventing kidney disease could have a major impact on feline health. Although there

Key points

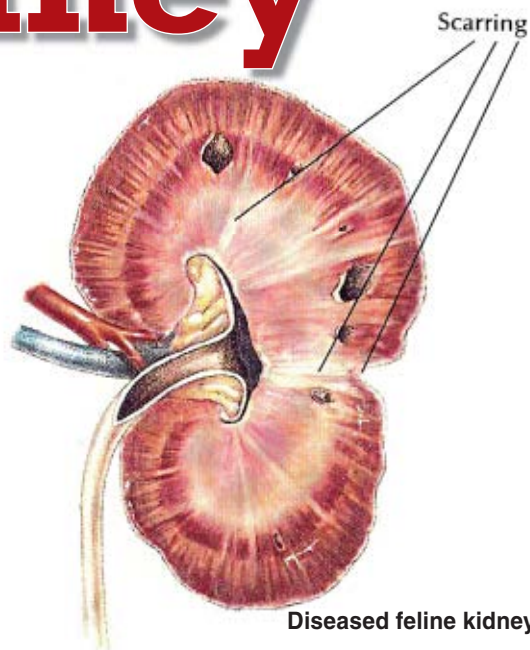
- ▶ There are no controlled, prospective trials showing that phosphorus restriction prevents the development of renal failure in cats.
- ▶ Phosphorus restriction reduces nephrocalcinosis in healthy cats.
- ▶ Phosphorus restriction reduces progression of renal failure in animal models.
- ▶ Low phosphorus dietetic foods are effective in feline patients with renal failure.
- ▶ Probably, low phosphorus intake prevents renal failure in cats.

is no direct experimental evidence, it is reasonable to suggest that a low dietary phosphorus concentration contributes to the prevention of renal disease.

Claims vs. reality

Various complete diets for senior cats claim to help prevent kidney disease. Out of 12 such diets for senior cats, five diets explicitly linked a low phosphorus content with the claim. Given an ideal dietary phosphorus concentration of 0.2-0.3 g/MJ, the label claim for three out of the five diets can be considered misleading.

The progression of CRF can be diminished and thus survival of the patient extended, but the condition cannot be healed. There now is strong evidence that appropriate dietary management, especially a low phosphorus intake, will enhance survival of cats with CRF. Consequently, some researchers theorize that restricting phosphorus intake will reduce the risk of the disease developing.



Diseased feline kidney.

Evidence of efficacy

Phosphorus restriction diminishes the severity of histologically determined kidney mineralization and fibrosis in cats with induced renal failure, indicating that loss of kidney function was retarded (see Table 1, p. 36). In rat models of renal failure, similar results have been observed. There is a consensus that phosphorus restriction counteracts the renal secondary hyperparathyroidism and subsequent kidney mineralization. Lowering of nephrocalcinosis diminishes the loss of nephrons commonly seen in CRF and thereby retards the progression of the disease to end stage. Thus, a low phosphorus concentration is the mainstay in the dietetic food for cats with CRF.

Theoretical considerations and experimental research have led to further dietary modifications that may be benefit patients with CRF. Apart from phosphorus restriction, the characteristics of a dietetic food for feline kidney patients are protein restriction, low sodium con-

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tent, high potassium content, a positive base excess, application of the nitrogen trap and a high level of eicosapentaenoic acid. Also, it is important to ensure the restriction of essential nutrients does not cause a deficiency.

A prospective study with cats has demonstrated that a dietetic food decreased the decline of kidney function and increased survival time (Elliot *et al.*, 2000). In a retrospective study, an increase in survival time was found when feline patients were fed a dietetic food instead of a normal diet (Plantinga *et al.*, 2005). On average, the survival time from CRF diagnosis is eight months without dietary treatment, but 20 months when an appropriate kidney diet is fed.

Scrutinizing dietary phosphorus levels

A decrease in phosphorus intake lowers kidney calcification in healthy cats (Pastoor *et al.*, 1995a). Nephrocalcinosis is considered a crucial factor in initiating the loss of nephrons.

Phosphorus in diets is present in the form of various organic and inorganic phosphates. The minimum total phosphorus requirement of adult cats fed a purified diet is 0.1-0.2 g/MJ (Pastoor *et al.*, 1995b). Dry diets may contain 25% of total phosphorus in unavailable phytate form so the minimum range for these diets is 0.13-0.27 g/MJ (0.20-0.41%). A proper kidney diet for adult patients should contain a phosphorus concentration in the minimum range, but not a lower concentration so as to prevent phosphorus deficiency.

Evaluation of diets for senior cats

It may not be required that a preventive diet be as harshly restricted in phosphorus as is a dietetic food for CRF patients. Thus, it could be suggested that a diet for senior cats should contain 0.2-0.3 g phosphorus/MJ. For comparison, the phosphorus requirement of kittens is 0.5 g/MJ. Obviously, adult cats at maintenance have a lower phosphorus requirement than do young growing cats.

Plantinga and Beynen (2003) chem-

Phosphorus and kidney calcification

	Group A	Group B
Dietary phosphorus, g/MJ (%)	0.80 (1.20)	0.22 (0.33)
Kidney mineralization, score	3.13	0.75
Kidney fibrosis, score	2.63	0.50

Table 1. Phosphorus restriction as sole dietary variable and progression of renal disease in cats with subtotal nephrectomy. Data are expressed as means for eight animals per dietary treatment (Ross *et al.*, 1982).

Misleading claims

Diet	Dry/wet	Phosphorus content g/MJ	
		Label	Analysis
1	D	0.56	0.71
2	W	Not given	0.90
3	D	0.31	0.26
4	D	0.30	0.33
5	D	0.55	0.71

Table 2. Phosphorus contents of diets for senior cats based on label values and chemical analysis. All five diets had a claim that the low phosphorus content of the diet contributes to the prevention or renal failure.

The label claim for three out of the five diets can be considered misleading.

ically analyzed and qualified 15 commercially available, complete diets for senior cats. Manufacturers of 12 diets claimed the diets would contribute to the prevention kidney disease. Labels for five of the 12 diets explicitly linked their alleged low phosphorus content with the claim.

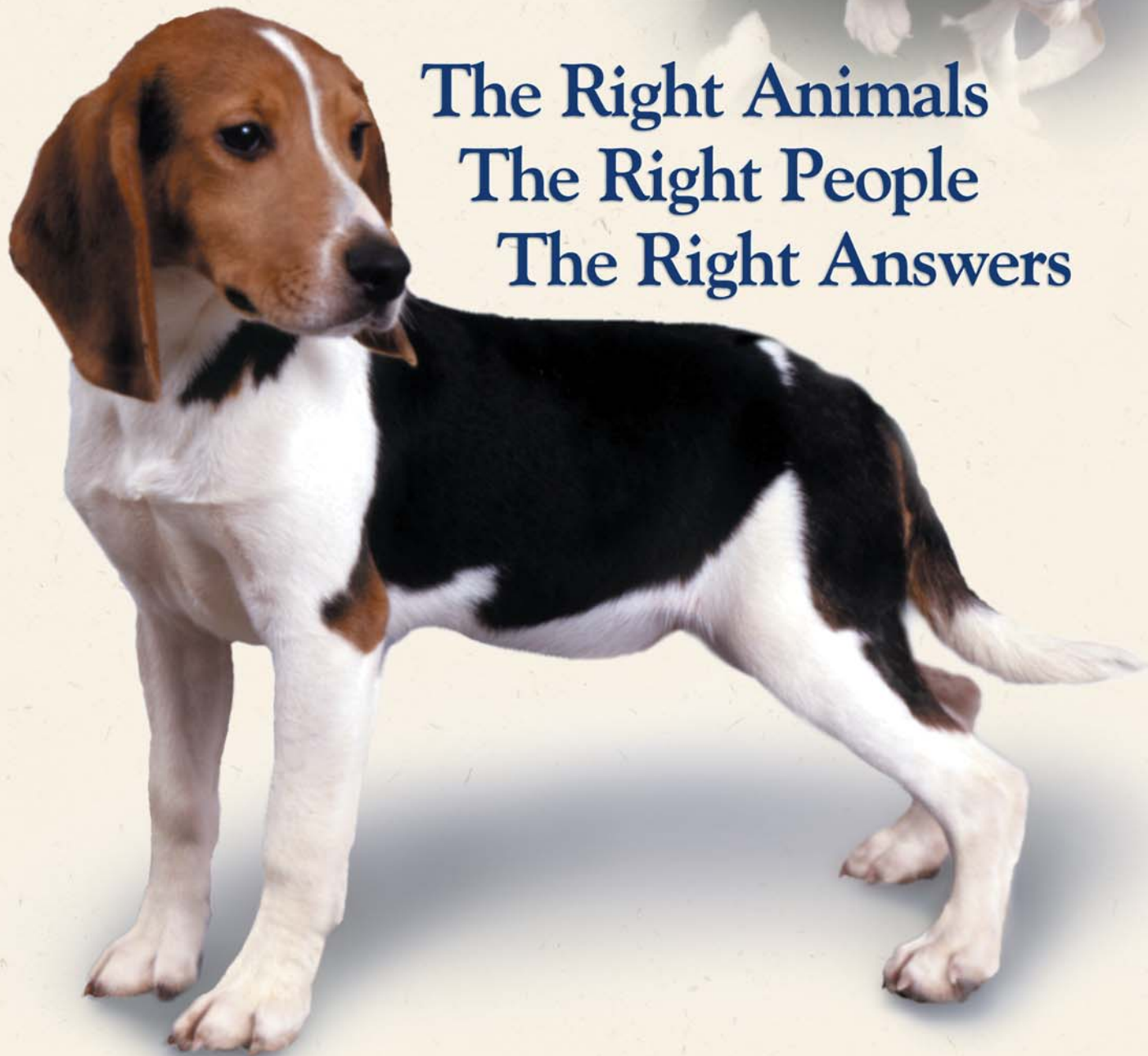
Table 2 documents the analyzed phosphorus contents of the five diets and the label values. Diets 1, 2 and 5 are very high in phosphorus when compared to the ideal range of 0.27-0.4 g/MJ for dry diets 1 and 5, and an ideal range of 0.2-0.3 g/MJ for canned diet 2. The analyzed phosphorus contents of diets 1 and 5 are considerably higher than the values in the guaranteed analyzed panel on the package. The analyzed value of diet 2 was extremely high. The claim that the diets 1, 2 and

5 are low in phosphorus can be considered misleading. Diets 3 and 4 had appropriately low phosphorus contents, the label values closely matching the analyzed values.

Misleading labels?

There is circumstantial evidence to conclude that a low intake of phosphorus may contribute to prevention of renal disease of cats. The corresponding claim frequently associated with diets for senior cats can thus be appreciated. The phosphorus content of such diets should be in the range of 0.27-0.4 g/MJ for dry diets and 0.2-0.3 g/MJ for canned diets. However, there are manufacturers claiming a low phosphorus content for diets for senior cats, and their claims can be considered misleading. ●

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FDA public meeting focuses on Health Consequence Scoring

The Center for Veterinary Medicine in the US Food and Drug Administration (FDA) held a public meeting on September 12, 2006, at its headquarters in Rockville, Maryland, USA, to discuss progress on development of its Animal Feed Safety System (AFSS). This program, initiated in 2003, is a multi-pronged approach by the agency to identify and address gaps in protection against risks to animal and public health from exposure to animal feed—including petfood.

In its effort to implement a “comprehensive, risk-based and preventive” feed safety program, FDA has identified four major areas of concern: the ingredient approval process, animal feed contaminants, process control and regulatory oversight. A draft framework outlining the principles and goals of AFSS can be found on its website (www.fda.gov/cvm/afssdraftframework.htm).

I believe this was the third public meeting on AFSS, but this one was specifically focused on the animal feed contaminant aspect. In fact, it addressed only one specific component of that aspect, namely, “Health Consequence Scoring.”

What is Health Consequence Scoring?

As described at the meeting, FDA intends to assign a Health Consequence Score (HCS) to each identifiable potentially hazardous contaminant of animal feed or feed ingredients. This will include chemical contaminants, pathogenic microorganisms and physical contaminants, although to



FDA still has a lot of work in this area.

— David Dzanis



date more work has been done on the former two categories than the physical contaminant category. An HCS is comprised of two factors: the likelihood of illness upon exposure to the contaminant and the potential severity of the illness. These are identified as the Potency Score (PS) and the Severity Score (SS), respectively. Scores can be different whether they are assessments of the acute adverse effects, chronic (non-cancer) adverse effects or carcinogenic effects.

For example, an acute PS may be 1 for a chemical substance with an established high oral LD₅₀ (a toxicological determination of the oral dose required to kill 50% of exposed animals). In other words, it would take consumption of a lot of this substance at once to have an adverse effect. A substance with a known low LD₅₀, on the other hand, could have a PS as high as 10. An SS could also range from 1 to 10, with adverse effects ranging from none to death. The HCS, then, is defined as PS times SS. A contaminant with an HCS closer to 1 may be deemed to have minimal health consequences, while one approaching 100 would be of far greater concern.

What is it good for?

By itself, the HCS is not very revealing about the potential risk posed by a particular contaminant, and to rely on that value alone for guidance may lead to false impressions. To truly understand the risk, the likelihood of exposure to that contaminant in feed must also be assessed, so FDA intends to develop a method to assign what I presume will be called an Exposure Score (ES) for each potential contaminant as well. While the agency is reportedly close to releasing its thoughts on how the ES will be determined, details are being saved until the next public meeting.

Multiplying the HCS by the ES for a given substance will provide a Relative Risk Score, an estimate of risk relative to other contaminants. By ranking the results, regulatory program priorities, resource allocations and other risk management decisions can then be based in part on this relative risk ranking of contaminants. That does not mean, though, that the contaminant with the highest relative risk will receive the highest regulatory priority.

As I understand it, many other factors come into play, such as the availability of resources required to imple-

ment a risk management program and the potential effectiveness of that program with the available resources. For example, if due to unique issues with a contaminant, its risk cannot be managed despite commitment of considerable resources, then a contaminant with lower relative risk, but where effective measures are practical to implement, may be of higher priority to the agency.

Reportedly, FDA will use these relative risk rankings for internal guidance only—i.e., not to make regulatory decisions about an individual case of feed contamination. In those circumstances, an assessment to determine absolute risk, versus relative risk, is more appropriate.

Next steps

Based on the public feedback, FDA still has a lot of work in this area. For example, one meeting attendee seriously questioned the logic of a PS value at all for microbiologic pathogens, since as the organisms grow in the contaminated feed this value would change over time.

Personally, I have reservations about characterizing approved food additives as “contaminants,” as presented at the meeting. Clearly, there must be regulatory oversight to ensure safe use of these ingredients, but lumping them in with things like pesticides, mycotoxins and dioxin may lead to incorrect impressions of their safety when used as required by law in feed. Perhaps when the ES values for these substances are determined, their relative risks can be put in proper context, and a more accurate representation of their safety will be seen.

Also, FDA noted that it is simply lacking data to allow for sound HCS determinations for many contaminants. An appeal was made for public input of safety data to facilitate the process, but it was made clear that any submission to the agency would be publicly releasable information.

As mentioned above, the next public meeting will discuss FDA’s intended methods of ES determination (and presumably, more on the HCS for physical

contaminants). It is not known when the next meeting will be at this time. In the interim, it is my understanding that FDA intends to post the presentations and transcripts from this meeting on the AFSS Docket (www.fda.gov/ohrms/dockets/dockets/03n0312/03n0312.htm). ●

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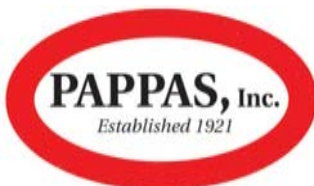
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Onions and garlic offer flavor in the right amounts

Onions, garlic and their close cousins chives, shallots and leeks have been documented as food and medicine for well over 5,000 years. They have been cultivated, worshipped, valued as currency and used to ward off evil spirits from the time of the early Egyptians to the present day. The aroma and seasoning ability of these bulbous herbs are substantial and unmistakable; but their use in early human diets may have as much to do with their ease of growth, water content, storage capacity and preservation properties as do their taste.

Numerous benefits for humans and pets alike

These herbs have been associated with a number of health benefits including cholesterol lowering, anti-hypertensive, anti-thrombotic, anti-neoplastic and anti-infective (Tattelman, 2005). Each contains a number of nutritionally relevant compounds such as fructans, organic minerals, flavanoids, B vitamins and hundreds of organo-sulfur compounds. Extracts from both onions and garlic have been shown to have anti-bacterial and anti-fungal properties. With so many positives, it seems natural that pet owners and well-intentioned petfood companies would want to include them in the diet of dogs or cats.

There are thousands of research papers published on the merits of garlic and onions in the human diet. The press is rife with reports regarding their health benefits, especially for garlic. Thus, the rationale for incorporating these herbs into pet diets is very compelling, especially considering how “label friendly” they can be to the

Onions and garlic can lead to anemia—and ultimately death.

— Greg Aldrich



petfood purchaser. In addition, onions and garlic have been a part of companion animal diets for as long as dogs and cats have been associated with people via table scraps and leftovers.

Use in petfood adds palatability

Several petfood companies use onion flavor or onion powder in their products and actively promote them. Further, a number of petfood companies incorporate garlic into their formulas, more frequently in dog foods than cat foods. These are established and mainstream petfood companies that have conducted feeding trials to substantiate these foods.

More often onion flavor can be found in treats and jerkies. Most likely it is added to improve palatability for the dog and possibly as an aroma mask for both pet and owner. Garlic is often added to dog foods as a flavoring agent, but its utility for this purpose is most likely more about perception than enhancing palatability, as a greater increase in palatability can be achieved with a similar amount of fat or meat ingredients. Garlic is also a common ingredient in dog and cat supplements.

For petfood applications, onions and garlic can be sourced through the market for human food ingredients, as few

feed ingredient brokers carry them. For those with the capacity to utilize them in the raw form, onion bulbs and garlic cloves are available. They can also be found as a puree, dried bits, powder or a flavored salt. Oil extracts, especially for garlic, are available. Aged garlic extract appears to be a popular form.

But wait, are there problems ahead?

However, in large enough quantities, both of these ingredients can create problems for dogs and/or cats—specifically, onions and/or garlic can lead to anemia and ultimately death. Reports of onion-associated anemia in dogs and cats started as early as the 1930s. In the 1980s, it was discovered that onions and garlic in various forms could lead to (reversible) hemolytic anemia in dogs and cats.

This onion- and/or garlic-induced anemia is brought about by specific oxidizing sulfur compounds overwhelming the antioxidant capacity of the red blood cells (Hu *et al.*, 2002; Yamato *et al.*, 2003). Oxidative damage to the red blood cell ultimately limits the oxygen transport capability of the blood. Unlike humans, the dog has weak antioxidant activity at the red blood cell membrane, and the hemoglobin of the cat is more susceptible to oxidative damage than is

that of other species (Cope, 2005). Thus, the reason dogs and cats react negatively relative to their human counterparts is that they are simply more sensitive. Unfortunately, supplementation with antioxidants does not overcome these oxidizing effects (Hill *et al.*, 2001).

All forms of onions have been implicated: raw, cooked, dried, pureed, etc. Dosages of 5 g/kg body weight for cats or 15-30 g/kg body weight for dogs have been reported to result in clinically important hematologic changes and "toxicosis" at consumption of more than 0.5% of body weight (Cope, 2005). There is also a genetic component to the response as certain breeds of dog, such as the Japanese breeds, are more susceptible (Yamato *et al.*, 1998).

Fewer reports exist on the ill effects of garlic or its "toxic" dose. But of the few, one noted that garlic (boiled-dehydrated) at a dose equivalent to 5 g/kg body weight led to the appearance of damaged red blood cells, but did not develop into hemolytic anemia (Lee *et al.*, 2000). Unlike onions, form may significantly affect these results as aged garlic extract supposedly acts more like an antioxidant in opposition to raw or boiled garlic, which may stimulate oxidation (Amagasse *et al.*, 2001). Aged garlic extract was also reported to be milder to canine stomach mucosa than boiled dehydrated or raw garlic (Hoshino *et al.*, 2001), which has been noted to lead to ulcers.

While there are many well-intentioned lists that state unequivocally that onions and garlic are toxins, the evidence at hand would suggest that these may be a bit too black and white. It does appear from the literature that onion is a problem for cats at most dos-

es (Robertson *et al.*, 1998); but similar data regarding garlic ingestion by cats is missing. For dogs, small amounts of onion may be fine, and for garlic it may be a matter of finding the right form. It would be helpful if more research regarding onions and garlic was conducted at dosages practical for petfoods. ●

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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In the US, private label petfoods do not dominate the market as they do in much of the world. In an international setting, private label is considered a mature market segment, particularly in the western European region. However, the fastest growing private label petfood opportunities are in underdeveloped or emerging markets.

To put it in perspective, according to AC Nielsen, private label petfood sales account for about 19% of all private label sales of consumer package goods globally.

Furthermore, petfoods are the third largest growth category (11%) of all private label products, behind cosmetics and baby food products. Globally, private label dog food sales are more than double brand name sales.

Mature and non-mature markets

When considering the global marketplace, five regions are typically under the microscope: North America, Europe, Asia Pacific, Latin America and underdeveloped or emerging markets. Evaluating the global marketplace means viewing the market in two ways:

- ▶ The mature markets, which include the regions of North America and Western Europe;
- ▶ The non-mature markets, which include Asia Pacific, Latin America and emerging markets.

According to Euromonitor, mature markets account for about 70% of all dog and cat food volume and value sales. From a volume standpoint, these regions are seeing average growth year over year. From a value perspective,

Globally, private label dog food sales are more than double brand name sales.

— Huntley Manhertz, Jr.



growth is significant due to increasing demand for premium-priced petfood products and services.

Non-mature markets, though a smaller share of total petfood volume, are seeing tremendous growth in value and volume, which, according to Euromonitor, is attributed to increased pet ownership.

Countries like Argentina, Brazil and Mexico are the major players in the Latin American market, while Poland, the Czech Republic and Hungary are countries from the eastern European block that are contributing significantly to the growth trend.

Japan dominates, but all eyes are on China

According to Euromonitor's 2005 report, Japan dominates the petfood sales in the Asia Pacific region, as it accounts for 75% of the total sales. However, China is becoming a very popular location to set up shop and entice the local consumer with mid-priced and premium petfood offerings.

Pet ownership in China is on the increase due to a variety of factors:

- ▶ The relaxing of domestic policies on pet breeding;
- ▶ Small family households and a growing, aging population;
- ▶ A change in perception among ur-

ban citizens with higher levels of disposable incomes;

- ▶ The desire for companionship, due to increased stress in an increasingly fast past environment.

Euromonitor's research also shows that in China, the younger adults are viewing pet ownership as a fashion and identity statement much like young adults in the US.

Dog and cat food sales are expected to develop rapidly as outside major players increasingly see China as a lucrative petfood market.

Lucrative return for manufacturers

The existence of underdeveloped markets that show promise, fueled by shifts in attitudes toward pet ownership, is good news for petfood manufacturers. It is evident that the petfood companies that can tap into popular culture and penetrate these emerging markets will realize a lucrative return. ●

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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Private labels pinched, hyperpremiums thrive

It is not easy being a producer of private label petfoods in the west of Europe at present. No clearer indication of this could be imagined than the recent industry stories that a major lending bank had refused funding for a proposed new private label petfood plant because it did not believe in the business model advanced with the loan application.

Other reports refer to the closure of at least one plant. Another company experienced cutbacks in investment plans. These reports are seen as illustrating a general malaise in which private label manufacturers find themselves in a cost-price squeeze, against a background of the rapid rise of private label production capacity in Europe.

Obviously, the major grocery retailers prefer to sell their own petfoods if possible. These offer a better margin than they would obtain from the equivalent sale of an independently branded product. To see the evidence, glance at the lineup of products at any supermarket. The brands are there, but they may be outnumbered.

At the same time, more manufacturing companies have entered the race in a bid

But hyperpremium petfoods seem to be leading the market charge in Germany.

— Peter Best



to win a share of the private label business. The competition grows almost daily in terms of new market entrants. It has handed the grocery chains the opportunity to become even more aggressive in negotiating with regular private label petfood suppliers. Hence, there's powerful pressure for suppliers to accept retailers' demands—even though supplier costs are mounting.

However, market watchers call all this a readjustment more than a fundamental change. They predict some removal of capacity in the short term, but a return to more agreeable levels of profitability once the supply-demand balance has been restored.

Hyperpremium petfoods

Wanted in Germany: A new name for extra-special petfoods. It is no longer

enough to talk about premium or superpremium products, Bianca Corcoran of market watch company Information Resources has told the German food sector publication *Lebensmittel Zeitung*. The time may have arrived when the only possible description for top-of-the-range products is "hyperpremium."

Certainly, pure luxury is now a clear selling point, not least in the area of wet foods for cats. Hyperpremium petfoods seem to be leading the market charge in Germany in 2006. ●

Peter Best is the European editor for Petfood Industry magazine. He can be contacted at: best@watt-4.demon.co.uk.



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Research Notes

Diet restriction and osteoarthritis in dogs

This study was conducted to evaluate the effects of diet restriction on development of radiographic evidence of hip joint osteoarthritis in dogs. In

► Diet restriction and osteoarthritis in dogs

(JAVMA 229:690-693): Lifetime maintenance of 25% diet restriction delayed onset and reduced severity of hip joint osteoarthritis.

► Primary hair growth in dogs and selenium

(JAPAN 90(3-4):146-151): Both low and high selenium diets reduce hair growth in adult dogs.

► Dietary modification for CKD

(JAVMA 229:949-957): The renal diet evaluated was superior to an adult maintenance diet in minimizing uremic episodes and renal-related deaths.

Key Concepts

a longitudinal cohort study, 48 Labrador Retrievers from seven litters were used. The 6-week-old puppies were paired with littermates by sex and weight, and each pairmate was randomly assigned to one of two groups of 24 dogs each.

Starting at 8 weeks of age, one group was fed *ad libitum* (control fed) and the other was fed 25% less (restricted fed) of the same diet for life on a pairwise basis. The dogs' hip joints were radiographed in the standard VD hip-extended view at multiple intervals prior to 1 year of age and at annual intervals thereafter based on birthdate. A board-certified radiologist unaware of group assignment scored the radiographs for evidence of osteoarthritis.

Restricted feeding delayed or prevented development of radiographic signs of hip joint osteoarthritis in this cohort of Labrador Retrievers. Lifetime maintenance of 25% diet restriction delayed onset and reduced severity of hip joint osteoarthritis, thus favorably affecting both duration and quality of life.

In addition, the data indicated that development of hip joint osteoarthritis was not bimodal in these dogs but occurred as a continuum throughout life.

Source: Smith, G.K. *et al.*, 2006. Lifelong diet restriction and radiographic evidence of osteoarthritis of the hip joint in dogs. *JAVMA* 229:690-693.

Primary hair growth in dogs and selenium

The objective of this study was to investigate the effect of dietary selenium (Se) concentration on hair growth in dogs. Thirty-six beagles were stratified into six groups based on age, gender and body condition score. The dogs were fed a torula yeast-based canned food for three weeks. Then the dogs were fed varying amounts of selenium supplied as selenomethionine for an additional 24 weeks. Analyzed selenium concentrations in the experimental foods for the six groups were 0.04, 0.09, 0.12, 0.54, 1.03 and 5.04 mg/kg dry matter, respectively. Body weight and food intake were not affected by the selenium treatments.

Serum selenium concentration was



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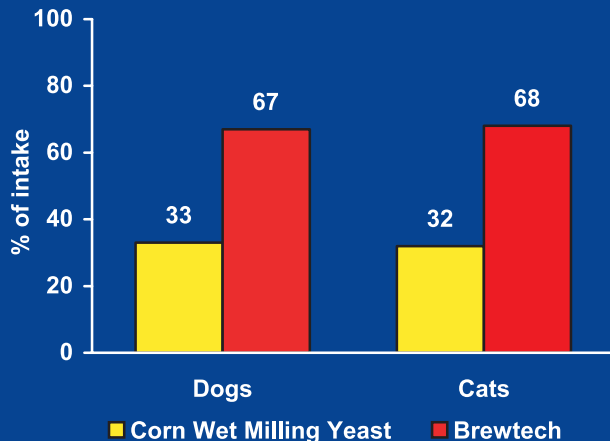


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similar initially, but was significantly different at the end of the study among groups. Dietary selenium concentration below 0.12 mg/kg diet may be marginal for an adult dog. Dietary treatment had no effect on serum total thyroxine (TT₄), free thyroxine (FT₄) and free 3,3',5-triiodothyronine (FT₃).

There was a significant diet and time interaction ($p = 0.038$) for total 3,3',5-triiodothyronine (TT₃).

Hair growth was similar among groups initially, but significantly reduced in dogs fed diets containing 0.04, 0.09 or 5.04 mg Se/kg when compared with 0.12, 0.54 and 1.03 mg Se/kg at

week 11 ($p < 0.05$) and week 22 ($p = 0.061$). These results demonstrated that both low and high selenium diets reduce hair growth in adult dogs.

Source: Yu, S., Wedekind, K.J., Kirk, C.A., and Nachreiner, R.F., 2006. Primary hair growth in dogs depends on dietary selenium concentrations. *Journal of Animal Physiology and Animal Nutrition* 90(3-4):146-151.

Dietary modification for chronic kidney disease

This study was conducted to determine whether a renal diet modified in protein, phosphorus, sodium and lipid content was superior to an adult maintenance diet in minimizing uremic episodes and mortality rate in cats with stage 2 or 3 chronic kidney disease (CKD). A double-masked, randomized, controlled clinical trial was conducted on 45 client-owned cats with spontaneous stage 2 or 3 CKD.


Cats were randomly assigned to an adult maintenance diet ($n = 23$ cats) or a renal diet (22) and evaluated trimonthly for up to 24 months. Efficacy of the renal diet, compared with the maintenance diet, in minimizing uremia, renal-related deaths and all causes of death were evaluated. Serum urea nitrogen concentrations were significantly lower and blood bicarbonate concentrations were significantly higher in the renal diet group at baseline and during the 12- and 24-month intervals. Significant differences were not detected in body weight, Hct, urine protein-to-creatinine and parathyroid hormone concentrations. A significantly greater percentage of cats fed the maintenance diet had uremic episodes (26%), compared with cats fed the renal diet (0%). There was a significant reduction in renal-related deaths, but not all causes of death were detected in cats fed the renal diet.

The renal diet evaluated in this study was found to be superior to an adult maintenance diet in minimizing uremic episodes and renal-related deaths in cats with spontaneous stage 2 or 3 CKD.

Source: Ross, S.J. et al., 2006. Clinical evaluation of dietary modification for treatment of spontaneous chronic kidney disease in cats. *JAVMA* 229:949-957.


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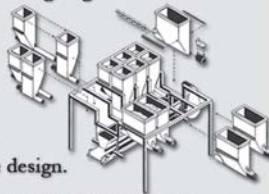
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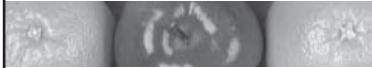
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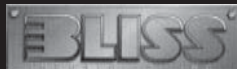
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Chowing down with Fluffy

Last month I attended the Backer 40th Annual Pet Industry Trade Show near Chicago with *Petfood Industry* publisher Steve Akins. None to our surprise, we saw many petfoods and treats touted as natural, organic or both. What really caught our eye were the number of products that looked exactly like food most humans would eat. (This could be partly because we made the mistake of covering the show without eating lunch first.)

These products take “human grade” to a whole new level. We’re talking chicken drumsticks with dumplings. Stew brimming with beef and carrots. Sausage resembling the finest bratwurst. Treats that could have been created at the most heavenly human bakery.

Of course, this is not news to those of you defining and riding this trend. And it’s manifest not only in products but also in petfood packaging, such as the new single-portion and resealable containers. In Europe, manufacturers are introducing sports drinks and drink packs for pets.

This trend is one of the most interesting responses to the desire of pet owners to treat their furry charges as full-fledged family members. Where does this inclination come from?

A long tradition

One likely source is the rising number of pet owners, especially couples, without human kids living in their homes. The percentage of two-adult households with dogs or cats but without children increased from 48.8% in 2003 to 55.5% in 2005, according to Packaged Facts (see p. 24).

We might find ourselves eating the exact same brands we feed to our pets.

— Debbie Phillips-Donaldson



Another possible reason could be based on a long tradition rather than a recent phenomenon: people’s tendency to anthropomorphize, or attribute human qualities to animals and objects. This has been going on for centuries in religion, mythology, literature, art and, increasingly in modern times, culture.

According to a website published by Carnegie Mellon University, www.anthropomorphism.org, some people trace this to Darwin’s theory of evolution. Darwin “argued that the difference between us and animals is only a matter of degree. Some biologists working with apes and chimps agree, as would people who consider their pets to be family members,” reads information on the site.

The site also explains some of the psychology behind anthropomorphism: “We apply special significance to many objects we possess and to animals and people with whom we feel close. A personal relationship with something or someone involves an emotional bond and a feeling there is less difference between them and us.”

This means we tend to identify with the other person or animal and take his or her perspective; we believe his or her traits and motivations are similar to our own. “Hence, we can expect that our own cherished friend, pet

or product will be excused from any foibles and given credit for successes and benefits,” the site says. It also cites studies showing that people perceive animals to have personality traits—for example, a dog may be described as extroverted, cheerful and outgoing.

Pink shoes for dogs

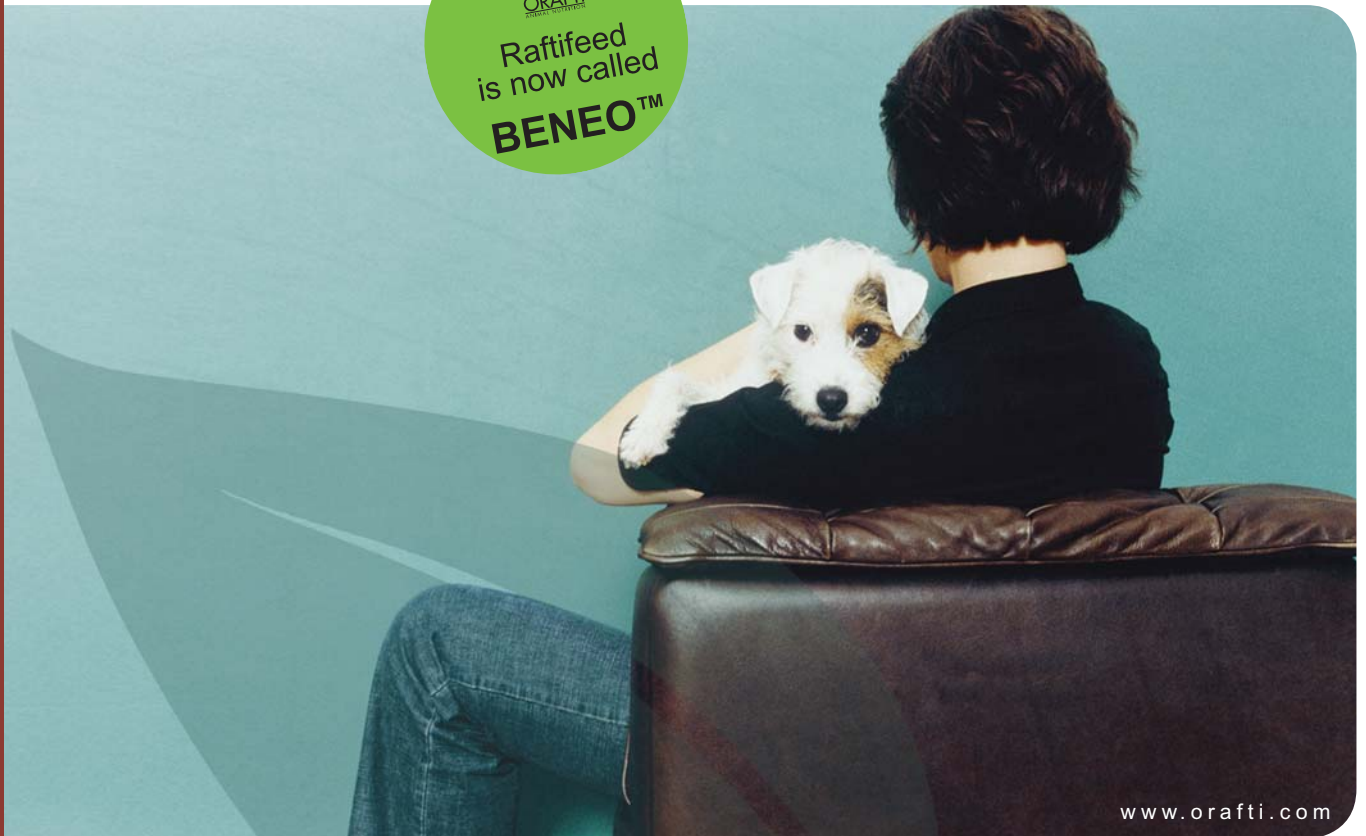
That’s why, if you look up “anthropomorphism” on www.wikipedia.com, you’ll find a photo of a dog wearing a camouflage hat and coat, plus a scarf and sunglasses. Or why at a pet trade event such as the recent Backer show, you’ll see products like pink tennis shoes for dogs and stuffed animals specially designed for puppies and kitties—plus all those supposedly human-edible petfoods and treats.

I’ve heard experts say they can see this trend evolving to the point, not too far off, when we might find ourselves eating the exact same brands we feed to our pets. Now wouldn’t that open up a lucrative new business model and revenue stream? ●

Phillips-Donaldson is editor-in-chief of Petfood Industry magazine. E-mail her at dphillips@wattnet.net.



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Pets and people have a special bond. It is based on a feeling of trust and an understanding of each other's needs. Quality food is such a need and the natural answer is BENE^o™. Discover the unique technological applications of our products like improving appearance, structuring pet foods and mouth feel. Our scientists at ORAFI are experts in digestive health research and specialize in illustrating how good digestive health contributes to nutrient absorption, better immunity, a shiny coat, healthy stools and improved overall metabolism. What's more, they can advise you about our latest results so you can anticipate the upcoming trends and serve the best a pet can get.

Call Piotr Janowicz on +32 16 801 372 or send an e-mail to piotr.janowicz@orafiti.com for an appointment with one of our sales managers in your region.

ORAFI Animal Nutrition, your partner in product innovation.



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NEW

*Wenger **Magnum ST Extruder**
takes operating parameters to the **extreme!***

You've been waiting for a machine like the new Wenger Magnum ST twin-screw extruder. Now, it's time to put it to work!

Use its **Magnum-level Speed and Torque** to step down to a smaller extruder without giving up capacity. Or use the higher SME capabilities to provide the unique physical properties that your product requires.

With maximum speeds up to 1,200 rpm and power levels to 165 kWhr/t SME at volumetric capacity, the new Magnum ST extruders are ideal for meeting an extreme range of operating parameters.

Build One to Your Specs

Available in four sizes, Magnum ST Series extruders can be custom designed to fit your specific needs with a

broad list of features and options. Build your configuration to include new shear and kneading elements, with flighting from 0.5 to 1.5 pitch, for precise control of product shape, texture, density and cooking time.

Then choose from a range of complementing process tools, including Wenger's patented DDC preconditioner, our unique mid barrel and back pressure valves, an external density management system, a new overhead rail system and a manual or automatic control system.

No matter the product or how you choose to set it up, you owe it to yourself to check out the new Wenger Magnum ST soon. You've never experienced so much potential.