

February 2007

Petfood Industry

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Eat well, be well

Old Mother
Hubbard's
mission, p. 18



Finding your next niche

Preview:
Petfood Forum 2007

Examining
regulatory concerns

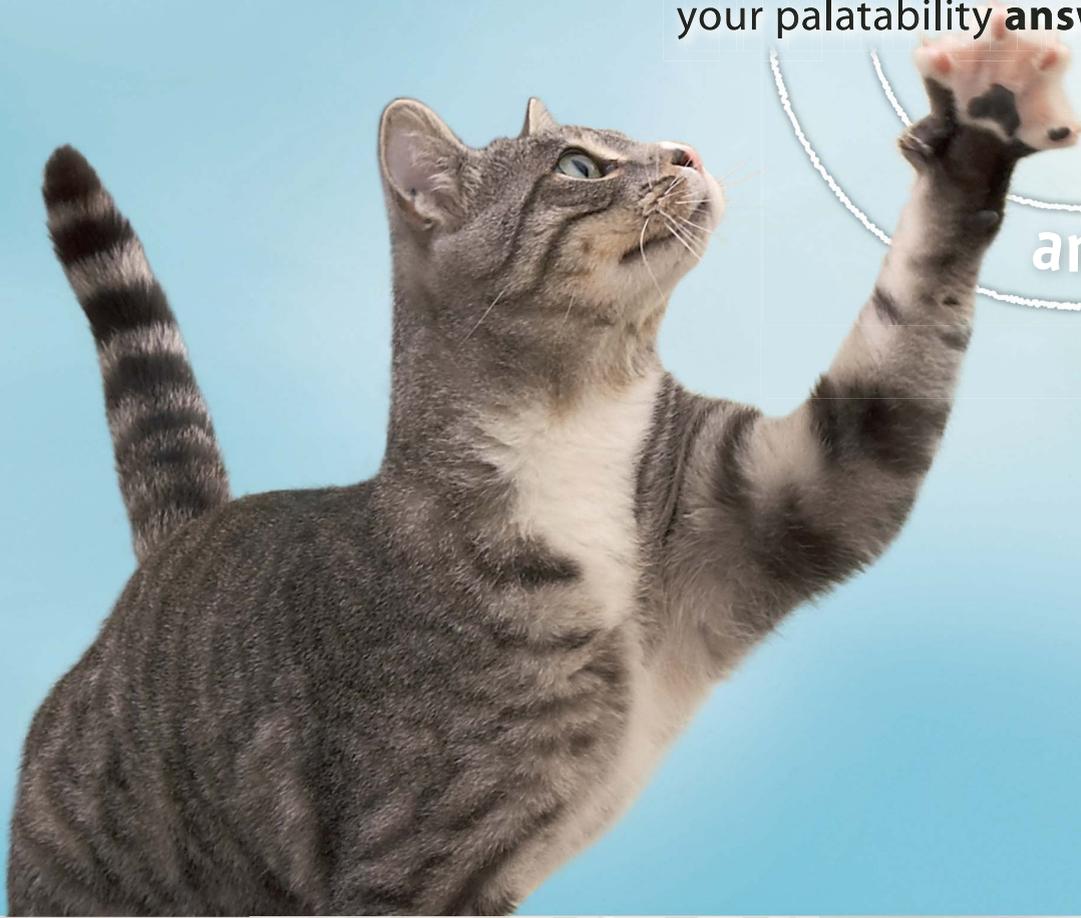
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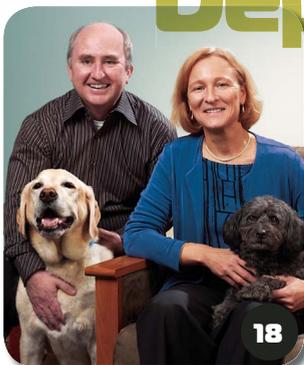
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Photo by Dave Bradley
(www.davebradleyphoto.com).

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Catterton Partners: fueling growth

“Catterton has been a wonderful financial and business thought partner for us,” says Deborah Ellinger, president of Old Mother Hubbard. She goes on to say, “It has enabled us to make the investments, which were needed over the past few years, to fuel our growth and to fulfill our mission of providing uncompromising nutrition for pets. We couldn’t have made all of the changes we have made without their backing and strong marketing orientation. Wonderful people, too!”

Who are they?

While working on the Old Mother Hubbard profile (p. 18) in this issue, I first learned about Catterton Partners. I was curious, so I checked their website (www.cattertonpartners.com). I learned Catterton is a large private equity company that focuses on the “middle market consumer” that is driven by four primary elements:

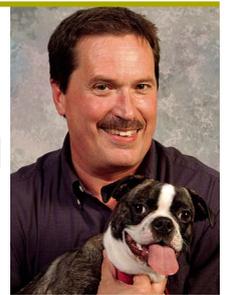
1. The market is large and attractive—at US\$7.9 trillion, the consumer segment in the US has demonstrated long-term revenue growth.
2. The consumer industry has significant growth potential—attractive investment opportunities in the consumer sector are being driven by numerous factors.
3. The consumer industry leverages its knowledge base.
4. There is a proven track record of success in this arena.

Investment criteria

The Catterton website notes that companies that meet its investment criteria share a number of common features:

There’s a lot going on in this industry—many layers, many players and many opportunities.

— Tim Phillips



- A concept with substantial, identifiable consumer demand that can be effectively replicated in multiple markets;
- A unique and leverageable brand asset or capability that differentiates the company from its competition;
- Attractive business model economics, addressing a specific customer need and demonstrating the operational capabilities to achieve market leadership;
- Strong management in place with a proven ability to execute a clearly defined strategic business plan;
- A strong, focused and customer-oriented culture;
- Significant growth or growth potential and an expansion strategy that is consistent with the company’s performance history; and
- A defensible and extendable position in a growing industry category.

What I learned

According to its website, Catterton is able to add value to each investment through: strategic planning; recruiting key members of management; fostering growth; enhancing operating performance; identifying and executing synergistic mergers and acquisitions; and realizing equity value.

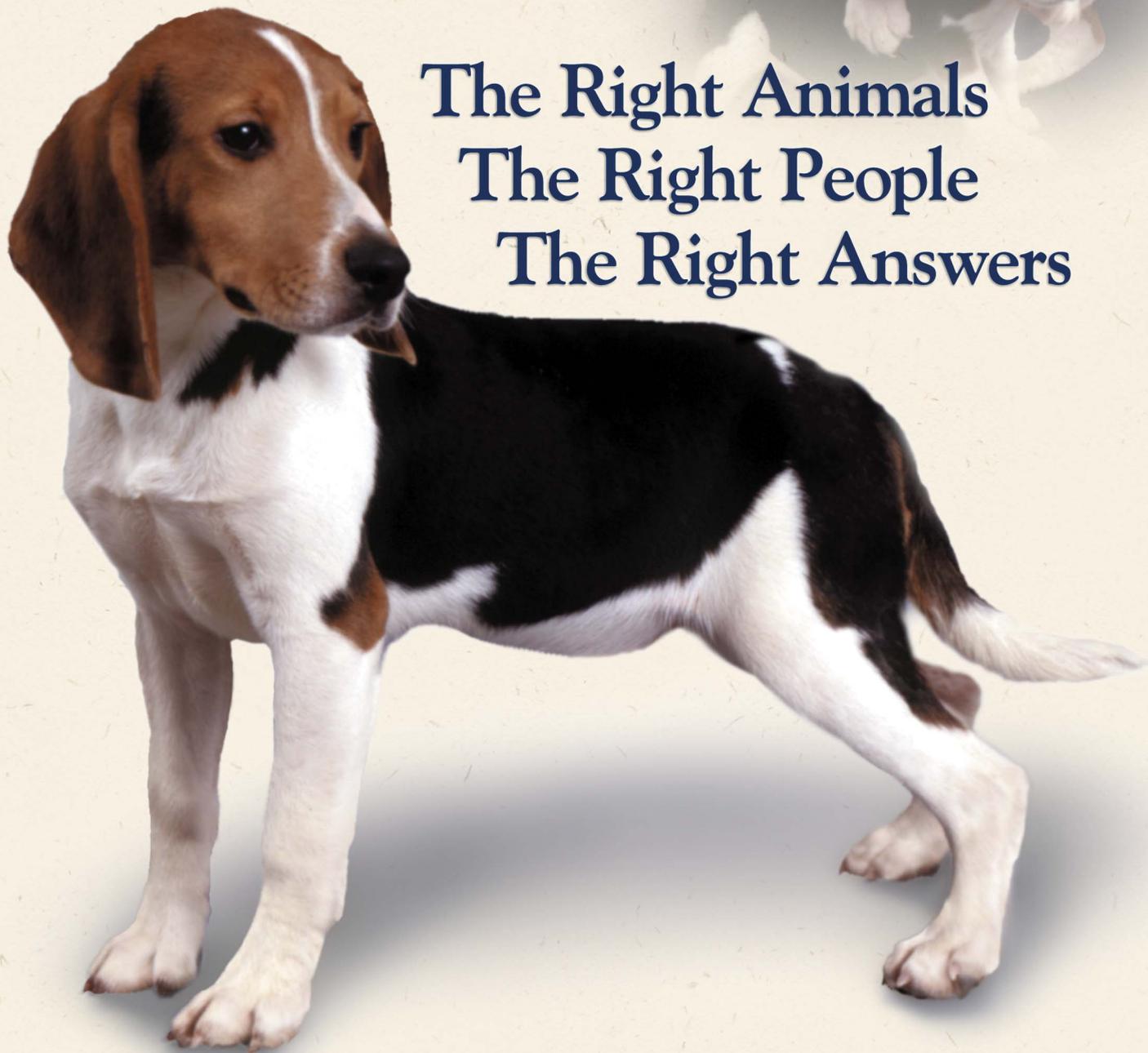
It is clear there’s a lot going on in this industry—many layers, many players and many opportunities. It’s a great time to be in the petfood industry!

Corrections

Authors of a palatability article in our December issue prefer the title “Effects of phosphoric acid on cat kibble palatability.” They also emphasize that phosphoric acid can enhance palatability when used with a liquid palatability enhancer (PE) alone, but will significantly decrease palatability when a powdered PE is used. So, it is important to spray phosphoric acid as far from the dry PE application as possible in the coating sequence, and before the fat is applied.

In our January issue, in the article “Industry leaders talk,” Angele Thompson’s first name was misspelled and her location was wrong. Her contact information is: Thompson PetTech, 45 Laurel Dr., New Providence, NJ 07974, Tel: 1.908.898.0055, E-mail: tppetec@cs.com. ●

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



The Right Animals
The Right People
The Right Answers

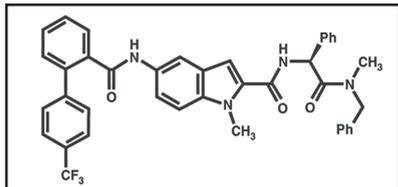


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Industry News



FDA approves the first drug for obese dogs

The Food and Drug Administration (FDA) recently announced the approval of Slentrol (dirlotapide), a prescription drug indicated for the management of obesity in dogs. Slentrol reportedly reduces appetite and fat absorption to produce weight loss.

According to Slentrol manufacturer Pfizer Inc., the drug is a new chemical entity, called a selective microsomal triglyceride transfer protein inhibitor, which blocks the assembly and release of lipoproteins into the bloodstream. The mechanism for producing weight loss is not completely understood, but seems to result from reduced fat absorption and a satiety signal from lipid-filled cells lining the intestine.

For more information on Slentrol, go to www.fda.gov/ohrms/dockets/98fr/2006-141-260-fois001.pdf and www.fda.gov/ohrms/dockets/98fr/E6-22542.htm. The manufacturer's information can be found at www.pfizerah.com/slentrol.

Mark L. Morris Jr., Hill's product developer, dies



Mark L. Morris Jr., DVM, PhD, died January 14 at his home in Topeka, Kansas, USA.

Morris was born in 1934. His father, Mark L. Morris Sr., was a veterinarian who developed a line of therapeutic products, Prescription Diet petfoods.

Following in his father's footsteps, Morris Jr. expanded the Prescription Diet line. He then developed the commercially successful line of products known as Science Diet petfoods. He also developed the ZuPreem line of products for zoo animals.

Morris served as vice president of scientific activities for the Morris Animal Foundation, the largest non-governmental, nonprofit organization funding animal health studies in the US. Donations in memory of Dr. Mark Morris Jr. may be made to: Morris Animal Foundation, 45 Inverness Drive E., Englewood, Colorado 80112 USA, www.morrisanimalfoundation.org.

USDA may expand BSE minimal-risk imports

The US Department of Agriculture's Animal and Plant Health Inspection Service (APHIS) recently announced a proposal to expand the list of allowable imports from countries recognized as presenting a minimal risk of introducing bovine spongiform encephalopathy (BSE) into the United States. Currently, Canada is the only minimal-risk country designated by the United States.

The proposal expands upon a rule published by APHIS in January 2005 that allowed the importation of certain live ruminants and ruminant products, including cattle under 30 months of age for delivery to a slaughterhouse or feedlot, from countries recognized as minimal risk. The proposed rule was published in the January 9 Federal Register and is available online at www.aphis.usda.gov.

Nutritionists launch custom recipe system

Using patent-pending, Internet-based software and all-in-one supplements, pet owners can now create recipes for their dog or cat at home. Sean Delaney, DVM, MS, diplomate of the American College of Veterinary Nutrition, and software engineer Aniel Santos created Balance

IT (www.balanceit.com). Initially developed for board certified veterinary nutritionists and later for veterinarians to use to help improve the diets of their patients, Balance IT allows the pet owner a choice of 72 different combinations of common human foods using an online three-step process. Selecting one of the combinations gives the user access to around 400 unique recipes in the Balance IT "cook-book" developed by a team of board certified veterinary nutritionists.

China halts dog cull



Due to thousands of letters from animal lovers around the world, the culling of feral dogs in Beijing to prevent the spread of rabies has been halted. The crackdown started in Beijing at the end of October. In response, the International Fund for Animal Welfare (www.ifaw.org) and other animal rights groups organized letter-writing campaigns. The mass of letters from around the world included one letter signed by 60,000 animal lovers from across China.

Pet Food Institute elects new board chair

The Pet Food Institute (PFI) recently announced the election of the new chairman of the PFI Board of Directors, Terence E. Block, president, North American Pet Foods, Nestlé Purina PetCare Co. Block was elected at the association's Annual Meeting & Suppliers Mart held in Chicago last fall. "I'm honored to serve as PFI's board chairman and look forward to working with other PFI members on key issues affecting our industry," said Block.

Victam Asia 2008 to feature Petfood Forum

Victam Asia 2008 will bring together exhibitors, conference delegates and visitors from throughout Asia. The

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Low Ash Chicken Meal (EU & Domestic)

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Queen Sirikit National Convention Center in Bangkok, Thailand, is again host to Southeast Asia's premier event for the animal feed, aquafeed, petfood and grain processing industries. The exhibition will have a dedicated area devoted to Thai and Chinese companies that manufacture and develop equipment and technology for these industries.

Conferences organized by the Thai Department of Livestock Development on animal feed and an aquafeed workshop organized by Aquafeed.com USA will be repeated in 2008. A new conference will also be included—Petfood Forum—organized by *Petfood Industry* magazine, published by Watt Publishing Co. It will follow the format of the well-known event organized by Watt in the US and the Netherlands. Further information is available at www.victam.com.

New website for job opportunities

A website has been developed to help companies find qualified individuals and help individuals advance their careers. Job-seekers can visit www.petfoodindustryjobs.com on a regular basis and watch for new postings. To be more proactive with your search, post your profile and have potential employers contact you. Sales managers, general managers and human resource managers can post their job openings to help find the best individuals

Alcan promotes Gordon to president and CEO

Alcan announces the appointment of Ilene Gordon to president and CEO of Alcan Packaging and senior vice president of Alcan Inc. Gordon, who is presently president of Alcan Packaging Food Americas sector, succeeds Christel Bories, who was recently appointed president and CEO of Alcan Engineered Products. Both appointments took effect December 1, 2006.

New BSE hypothesis being studied in EU

Scrapie is generally considered, but not proven, to be the source of bovine spongiform encephalopathy (BSE). The European Commission's Fifth Framework Program has funded a five-year project (the SC GUT project) to address

scrapie and BSE in sheep. The SC GUT project studies scrapie and BSE in sheep and mice, using novel experimental methods. It is hoped that these studies will result in a better understanding of the early pathogenesis of scrapie and BSE, and this will contribute to the better application of diagnostic methods

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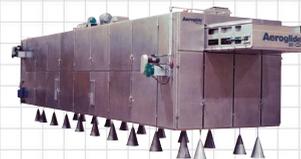
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Results from this project are demonstrating that although deformed prions are a characteristic of transmissible spongiform encephalopathies (TSEs), it is possible that they are not the initial infectious agent. This theory is based on how these

proteins are absorbed in the sheep gut. In addition, experiments suggest that in the normal animal almost all ingested prions will be digested before they could be absorbed by the gut—supporting the theory that prions do not cause the disease by passing through the gut wall.

The new discovery does not rule out

the possibility that prion proteins, if absorbed in sufficient amounts, might still cause disease, or it may be that prions directly infect nerve endings by some other mechanism.

Taiwan petfood market developments



The US exported US\$23 million of petfood to Taiwan in 2005, a 53% increase over 2004 exports. Although the US leads (in close heat with Australia), Taiwan still imports petfood from a diverse range of countries. In 2005, Taiwan's imports of petfood totaled US\$57 million, a nearly 14% increase from 2004. US petfood imports continue to recover from an 80% fall due to BSE concerns in 2003; rebounding in 2006 is expected to continue over the next few years, and market size is expected to increase. With renewed effort from US petfood exporters, the 40% US market share could continue to grow, solidifying the US position as the chief petfood exporter to Taiwan.

Taiwan's rapid globalization has led to an increased focus on health and nutrition for everyone, including household pets. Traditionally, Taiwan household pets have been fed leftovers, but rising income and western influence have led to increased demand for specifically manufactured petfood. On the whole, Taiwan generally follows pet trends set in the US or Japan. For the entire USDA Foreign Agricultural Service report, go to www.fas.usda.gov/scriptsw/attacherep/attache_lout.asp.

Hinkens joins FSNS

Jay Hinkens has been named laboratory manager for Food Safety Net Services (FSNS) in the Dallas/Fort Worth, Texas, USA, facility. During his 17-year career in the laboratory testing industry, he has served as a consultant, lab director and technical sales manager.



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Using non-traditional ingredients in unconventional petfoods

Fresh, real, meat, holistic, and raw are all terms used in profusion to describe the many new products emerging onto the scene in the petfood aisle. These are all a part of the movement underfoot in the petfood industry to create more humanized foods that use meaningful language to consumers, and/or take advantage of new approaches to dog and cat nutrition like the growing popularity of home prepared and raw foods.

Join David Lummis of Packaged Facts and Dr. Greg Aldrich from Pet Food & Ingredient Technology, Inc., for a discussion on the types of ingredients that are being used in this next generation of petfoods. These ingredients include fresh/frozen meats, whole animal/bird parts, and fruits and vegetables.

IN THIS WEBINAR, YOU WILL HEAR:

- What are the key ingredients in the next generation of pet foods?
- What are the opportunities for new products using these ingredients?
- What are the challenges for manufacturers who choose to use these ingredients?

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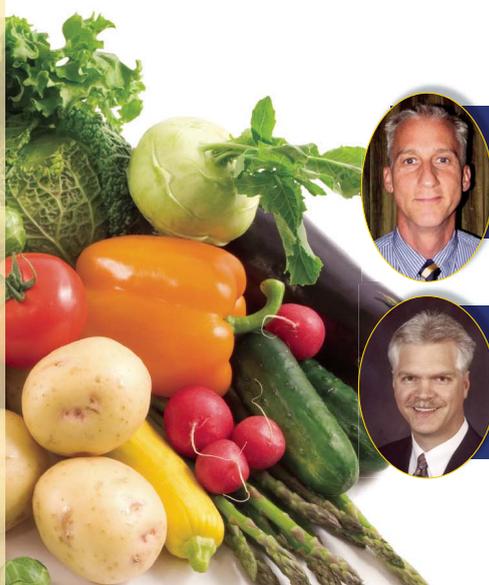
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DAVID LUMMIS
PET MARKET ANALYST,
PACKAGED FACTS



GREG ALDRICH
CONSULTANT,
PET FOOD & INGREDIENT
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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.

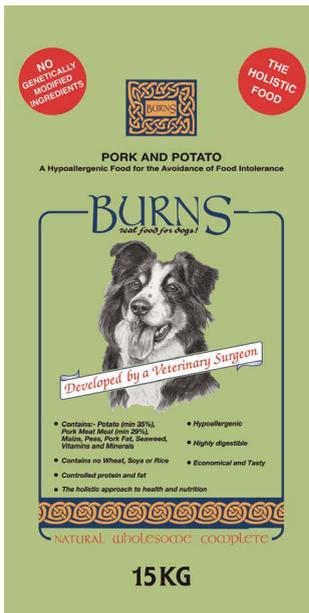


Freshly prepared meals for dogs

Deli Fresh and Homestyle Select are freshly prepared meals of real meats and vegetables, according to the manufacturer, Freshpet. Because of the meat content and lack of preservatives, these products need to be kept refrigerated. Each meal contains 70% meat protein mixed with carrots, peas and brown rice to form a complete and balanced meal. The cooked meals come in three sizes from 1.5-pound up to 6-pound rolls. www.delifreshpet.com; www.homestyleselect.com

Guilt-free dog treats from Dad's

Dad's Treats has introduced a new product, Guilt-Free Treats. The soft, chewy dog treats are formulated to have no artificial flavors or colors and have 33% less fat than leading brands of dog snacks, according to the company. The treats are heart-shaped and come in Bacon or Bacon & Cheese flavors. www.dadstreats.com



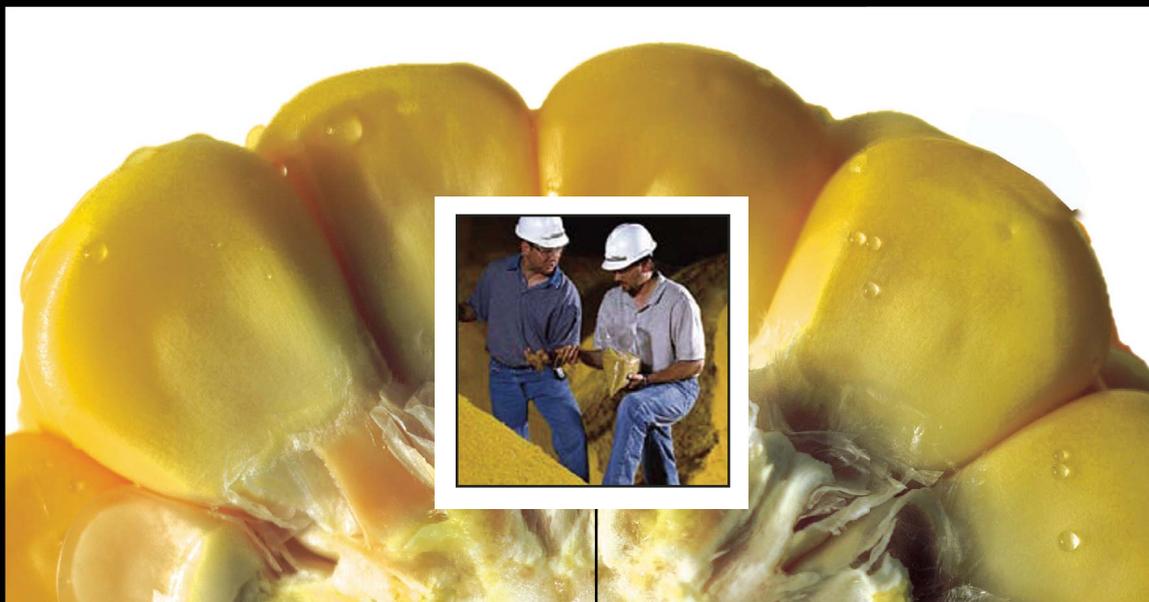
Pork and potato hypoallergenic diet

According to Burns Pet Nutrition, its new hypoallergenic diet offers a lean and high-quality protein source with a good balance of amino and fatty acids. Pork & Potato contains no wheat, soy, rice or chicken, colors, flavorings or artificial preservatives. www.burns-pet-nutrition.co.uk

European delicatessen dog biscuits

Rodi has created a new concept based on the premium multi-layered dog biscuits produced by its bakery in Denmark. Formulated from human-grade recipes, Euro-Deli dog biscuits come in six flavors including Pizzas di Roma, Wiener Schnitzels, Danish Cookies, Belgium Bonbon, German Bratwursts and Irish Stew Bones. www.rodipetfood.nl





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Eat

Old Mother

BY TIM PHILLIPS, DVM

Spend much time at the Old Mother Hubbard corporate offices and you'll sense a missionary zeal backed by good business practices. I was there in January and met about 30 of the people and pets that work there. They were bright-eyed, bushy-tailed and authentic. I saw enough to think their mission and cultural values are real—not just platitudes suitable for framing.

Says CEO Jim Scott Jr., “Our core competency is teamwork focused on doing whatever it takes to make the healthiest petfood possible.” The result is a company launching inspired new products and growing at 20-30% per year.

Recent achievements

All is well with OMH new product endeavors. Since 1997, the company has launched many of its best-selling products. OMH was spun off in 1926 from Hubbard & Sons, a Massachusetts bakery. In 1961, Jim Scott Sr. purchased the business, and in 1992, Jim Scott Jr. became the company president and subsequently CEO. Recent OMH achievements have included:

- ▶ 1997—the launch of the Wellness product line with dry dog food.
- ▶ 2000-2003—the extension of the Wellness product line to include dry cat foods, wet dog and cat foods, treats and supplements.
- ▶ 2004—the Scott family's selection of Catterton Partners (www.cattertonpartners.com) as a financial partner. (OMH is now privately held by the Scott family and Catterton Partners.)
- ▶ 2004—becoming the number one



Introduced in 2004, Wellness Simple Food Solutions is a line of food for dogs with allergies.

Business basics

Headquarters: Chelmsford, Massachusetts, USA.

Officers: Jim Scott Jr., CEO; Deborah Ellinger, president; Michael Meyer, COO; Jean Lizotte, VP new products; and Mark Shuster, VP marketing.

Financial partner: Catterton Partners, a private equity firm. OMH is now privately held by the Scott family and Catterton Partners.

Annual sales: The compound annual growth rate for Wellness has been at an average of over 30% in the past five years. The company is expecting continued, sustainable growth of 20-30% for the next several years. Total sales undisclosed.

Brands: Old Mother Hubbard, Wellness and Neura Meats.

Manufacturing: A network of 11 processing companies qualified by OMH.

Employees: 110.

Websites: www.oldmotherhubbard.com and www.wellnesspetfood.com.

well, be well

Hubbard's mission: healthier pets, living longer lives

natural food supplier to the US pet specialty channel, according to OMH.

- ▶ 2004—the launch of Wellness Simple Food Solutions, a line of food for dogs with allergies.
- ▶ 2004-2006—recruitment of a top-notch management team.
- ▶ 2005—expansion of manufacturing capacity by appointing two bakeries, a new canned facility and a new extrusion plant.
- ▶ 2006—the launch of WellBites and Pure Rewards, all-natural dog treats.
- ▶ 2006—the launch of Wellness 95% Meat, a mixer or topper than comes in a can.
- ▶ 2006—the celebration of 80 years of product innovation.

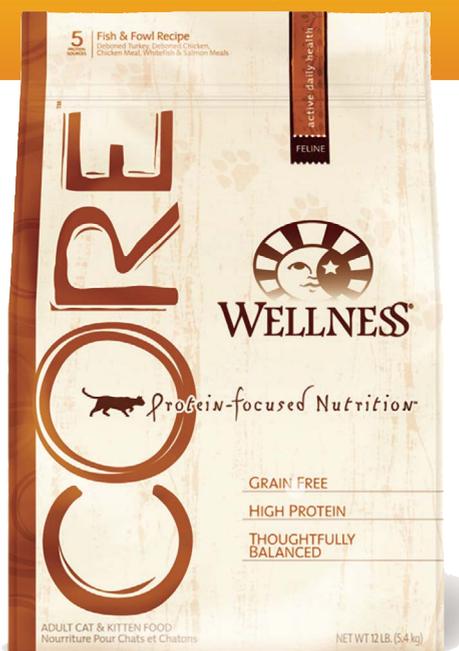
Wait, there's more. In early 2007, OMH is introducing:

- ▶ Wellness Feline Dietary Solutions—Complete Health; Healthy Weight; Kitten Health; and Indoor Health.
- ▶ Wellness CORE—a grain-free, protein-focused feline diet that addresses key health concerns.

OMH must be doing a lot of things right—the compound annual growth rate for Wellness has significantly outstripped the market for the past five years, at an average of over 30%. President Deborah Ellinger says the company is expecting continued, sustainable growth of 20-30% for the next several years—a pace that would put them among the top 10 global petfood companies.

Mission and values

At OMH, says Scott, “Family is number one and the job is a close second.”



Launched in February 2007, Wellness CORE is a grain-free, protein-focused feline diet.

The company culture encourages OMH people to have these priorities. In addition to the personal meaning of family, Scott talks about a familial feeling at work. He wants his team to work with “cooperation, trust and collegiality.”

The OMH mission is “to provide our animal companions with the best-tasting, most nutritionally balanced foods and treats available.” The company is committed to a “holistic approach to a healthy, nutritious diet” and to its independent pet specialty store partners.

Says Scott, “We have a fundamental responsibility to do the very best for the animals that provide us with unconditional love, trust and companionship.” Other basic values are:

- ▶ Seeking out natural, preventive health care solutions for pets.

Steps for product development

Here is OMH's basic framework for producing new products:

Concepting: market analysis; consumer research; and identify market and product requirements.

Feasibility: project scope and timeline; project team ID; supplier ID/contracts; and supplier and testing scheduling.

Product development: formula development; test runs; and acceptability, palatability trials.

Marketing: creative development; naming; positioning; main packaging (concepts, testing and final); sample packaging; and master carton.

Qualification and execution: packaging printing and availability; raw materials availability; distribution center setup; launch materials and programs developed; notification and training; field sales; consumer services; final forecast; and final cost and margins.

General availability: PR and Web; begin manufacturing; build supply; QA release; and available to ship.

- ▶ Being thoughtful about what's happening on the inside of an animal, as well as the outside.
- ▶ Using the very best ingredients, mixed and cooked by people who care about the quality of what they are making.
- ▶ Making OMH products available in environments where there is a shared dedication to knowledge and to doing what is best for animals.

Eye contact

OMH has now has 11 manufacturing partners. Ellinger contends that it's best for OMH to remain focused on the end result of creating the healthiest petfoods. So, they choose not to manufacture. But, that doesn't mean they don't expect a lot from manufacturing.

Management carefully selects manufacturers that can do the job the OMH way. Ellinger recently investigated 16 plants, of which only two measured up to OMH's standards.

The company also believes in a relentless approach to quality assurance. QA manager Karalyn Naiburg,



Deborah Ellinger (with Dazzle) joined OMH as COO in 2004 and was named president a year later.



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who joined OMH from Starbucks, runs a tight ship. She believes in applying human food standards to petfood, and her team's regular plant audits help keep manufacturers in top form. OMH also has QA inspectors on site at their warehouses identifying areas of opportunity for improvement.

OMH expects that people on the processing line care about the quality of what they are making. Says COO Michael Meyer, "Our vendors are not just manufacturers, but true partners who share our mission and commitment. At the end of the day, it's about people and shared beliefs." One criteria Meyer uses is the question, "Do the people on the line look you in the eye?" Makes sense to me.

Next stop Singapore

Having succeeded in establishing a healthy business in the US, OMH is now looking at the world for business-building opportunities. The company has received numerous inquiries from companies that are interested in distributing Old Mother Hubbard products in Europe and Asia. OMH will be launching in its first overseas market, beginning in the first half of 2007, with shipments to Singapore. OMH will ship direct from its warehouse in Salt Lake City, USA, to a distributor in Singapore. If this initial effort is successful the company will expand into other Asian markets and possibly Europe. ●

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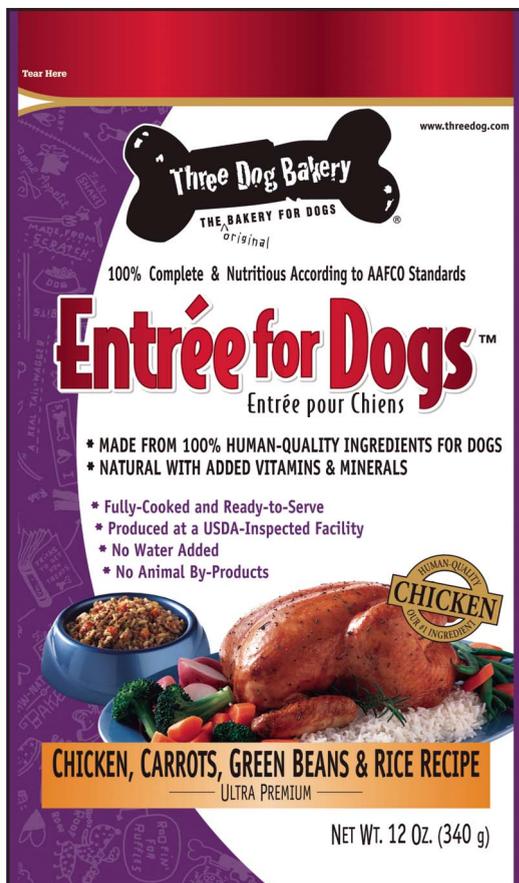
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Finding your next niche

New science, pet humanization and competition challenge formulators

BY TIM PHILLIPS, DVM

Pet owners' desire to treat their pets especially well will lead to even more niche markets. This Three Dog Bakery product is a good example of such niches. The company stresses it makes food for pets, not petfood.

Numerous new niches are springing up throughout the global petfood market. Consider this partial list: fresh chilled; raw; organic; grain free; human-quality ingredients; natural; exotic ingredients; superpremium; ultra-premium; home-cooked meals fortified with supplements; meat-centric and protein-focused diets. There are also niche diets for: skin health; gut health; dental health; urinary tract health; weight management; puppy trainability; large breed puppies; performance; seniors; and pets with allergies. What's your next niche?

Upsurge of novel positions

Recent interviews of petfood professionals by *Petfood Industry* have elicited the following comments about the upsurge of new petfood niches.

- Pet owners' desire to treat their pets especially well will lead to even more niche markets.
- The intense communication of pet owners via the Internet is leading to groups of customers with very specific requirements.
- The industry will become more fragmented as pet owners seek out customized dietary solutions for their pets.
- A broad cross-section of nontraditional ingredients are now popular in dry petfoods.
- In Western Europe, companies are noticing a shift from leading brands to niche products.
- Unearthing new needs and selling value-added pet products will expand the total Japanese market.

More evidence: "The demand for health-oriented products will have developed extensively in terms of sophistication by 2010," predicts Euromonitor. This trend will be amplified "by manufacturers' efforts to generate growth in mature markets through product innovation." Put another way, the number of

new petfood niches will multiply.

The future: genomics

Petfood Industry recently talked with Sean Delaney, DVM, DACVN (www.dvmconsulting.com). When asked about future new niches, he predicted: "I anticipate a growth in the number of foods that are perceived as natural or organic by the consumer. In addition, foods that use novel ingredients will continue to be a popular niche.

"At the same time, the number of foods that have some functional qualities beyond meeting known nutritional requirements will grow," Delaney continued. "Much of this growth will be spurred by developments in nutritional genomics where foods can be tailored to specific breeds' and even individual's genetic needs."

We also asked Delaney about formulating petfoods for various health conditions. He pointed out that such formulation "relies on the strength of the supporting science. One must feel confident that the nutritional interven-

tion will result in good and not cause harm.” In addition, he said, “The formulation must be feasible and palatable. The best theoretical formulation isn’t going to help any pet if it can’t be made and won’t be eaten.”

DIY processing

US estimates indicate over 2.5 million dogs and cats receive the majority of their calories from home-cooked foods (do it yourself processing). They’re often deficient in key nutrients like calcium, iron and taurine, which can lead to problems like fractured bones, anemia and heart failure.

Delaney and software engineer Aniel Santos have developed a product called Balance IT (www.balanceit.com). It is a

way to feed fresh human food to pets—using Internet based software and all-in-one supplements. The line includes two retail products: Balance IT canine & Balance IT feline, which can be used to create thousands of different recipes. There are also supplements for dogs and cats with liver or kidney disease.

Bottom line

Manufacturers will increasingly be testing the skills of petfood formulators. As new science and pet humanization lead to new niches and competition becomes more complex, formulators will be asked to fill more niches. ●

Formulation resources

- ▶ FEDIAF (European petfood manufacturers trade association) *Guide to Good Practice for the Manufacture of Safe Pet Food*: Includes a section on formulation—www.fediacf.org.
- ▶ AAFCO (Association of American Feed Control Officials) *Official Publication* (US): Provides nutrient profiles, feeding protocols and a label review checklist—www.aaaco.org.
- ▶ NRC (National Research Council—US) *Nutrient Requirements of Dogs and Cats*: Provides nutrient recommendations based on physical activity and stage in life, major factors that influence nutrient needs—<http://books.nap.edu/catalog/10668.html>.
- ▶ Formulation software: Many programs are available. It is best to choose one that specializes in petfood formulation—www.formatinternational.com; www.agri-data.com.
- ▶ Consultants: There are numerous formulation and marketing consultants that work throughout the world—you can find some of them at www.petfoodindustry.com: Click Directories, click the *Petfood Industry* logo and then click Services.

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Preview: Petfood Forum 2007

Expand your knowledge at this can't-miss event and at Petfood Focus on Treats

Petfood Forum 2007, the meeting place for petfood professionals, offers intelligence on new products and exposure to new business and networking opportunities.

Scheduled for April 16-18 at the Hyatt Regency O'Hare near Chicago, Illinois, USA, Petfood Forum provides face-to-face contact with experts on petfood marketing, production, nutrition and regulatory issues, along with suppliers and your industry peers. New this year, three general sessions on Wednesday, April 18, will provide unique insights from petfood company and pet retailing executives, plus exclusive, in-depth research on the industry. (You'll hear it here first!)

Petfood Forum 2007 will be immediately followed on April 18-19 by Petfood Focus on Treats, a comprehensive, in-depth educational program on the exploding market for pet treats.

Following is the most accurate and up-to-date scheduling, topic and speaker information available at press time. More information will appear in the March issue. Bookmark www.wattnet.com/petfoodforum for updates. If you have specific questions, contact Marcia Riddle (attendees) at E-mail: mriddle@wattnet.net; Tel: +1.815.734.5633 or Ginny Stadel (exhibitors) at E-mail: gstadel@wattnet.net; Tel: +1.815.734.5691.

Sessions in the same time slot are concurrent.

Petfood Forum 2007

Monday, April 16

- 1:00-7:30 pm Registration
- 5:30-7:30 pm Reception

Tuesday, April 17

- 7:00-8:00 am Breakfast
- 8:00-8:40 am

- **The latest packaging materials and equipment:** Tom Egan of the Packaging Machinery Manufacturers Institute covers Wal-Mart's sustainable packaging initiative, new retort technology and other topics.
- **Cognitive palatability testing:** Joseph Araujo, PhD, of CanCog Technologies explains a cognitive palatability assessment protocol based on associative learning, similar to how we select food at a supermarket.
- 8:45-9:25 am
- **New product trends:** David Lumis of Packaged Facts examines what's driving new product growth.
- **US regulatory report:** David Dzanis, DVM, PhD, of Dzanis Consulting updates the US petfood regulation scene, including a proposal that would require calorie content statements on labels and new rules expressly for organic petfoods.

- 9:00 am-7:30 pm Exhibits open
- 9:30-10:10 am Break
- 10:15-10:55 am

- **Popular functional ingredients:** Greg Aldrich, PhD, of Pet Food & Ingredient Technology Inc. describes some of the ingredients fueling the hot functional products market.
- **Obesity prevention:** Sean Delaney, DVM, of Davis Veterinary Medical Consulting explores the downside of highly palatable petfoods.
- 11:00-11:40 am
- **Packaging—noteworthy issues:** The impact of new product introductions on petfood packaging, such as the need for quick turnaround.
- **New and significant global regulations:** Terry Plant, regulatory consultant, highlights the most important regulations around the world for petfood producers.
- 11:45 am-1:00 pm Lunch
- 1:00-1:40 pm
- **Scrutinizing superpremium petfoods:** Nancy Kerns, editor of *Whole Dog Journal*, shares her insights on the increasingly complex task of choosing the best dog food.
- **Nutrition for skin and gut health:** Sally Perea, DVM, of Davis Veterinary Medical Consulting delves into the science behind these two expanding niches.

● 1:45-2:25 pm

➤ **The future of petfood retailing:** Jon Hauptman of Willard Bishop Consulting predicts how consumers of tomorrow will buy their petfoods.

➤ **Genomics—customized diets:** Keith Murphy, DVM, PhD, of Texas A&M University explores the exciting new science enabling manufacturers to develop diets based on pets' genes.

● 2:30-3:10 pm Break

● 3:15-3:55 pm

➤ **Global sales trends:** Elizabeth Higgins of Euromonitor International highlights the categories and brands spurring growth in the market.

➤ **Innovative treats:** Ken Meyers, CEO of Chomp Inc., shares how and why his and other companies have developed unique pet treats.

● 4:00-4:40 pm

➤ **Production—what's new and innovative:** Sajid Alavi, PhD, of Kansas State University provides an overview of exciting new developments on the manufacturing floor.

➤ **New NRC requirements:** George Fahey, PhD, of the University of Illinois covers highlights of this newly released, 400-page report.

● 5:00-7:00 pm Reception

Wednesday, April 18

● 7:00-8:00 am Breakfast

● 7:30-10:30 am Exhibits open

● 8:00-9:30 am

➤ **General session—executive roundtable:** Doug Cahill of Mars Inc., Ladd Hardy of Nutro Products, Marcel Blok of Breakthrough Consulting and Brian Connolly of Castor & Pol-lux share their insights on the petfood industry today and tomorrow.

● 9:30-10:10 am Break

10:15-10:55 am

➤ **General session—what pet owners want:** An executive from Petco shares consumer needs from the pet retailing perspective.

● 11:00-11:40 am

➤ **General session—the petfood industry in 2012:** David Lummis of Packaged Facts provides highlights of exclusive, in-depth research.

● 11:45 am-2:00 pm Luncheon

Petfood Focus on Treats
Wednesday, April 18

● 1:00-3:00 pm Registration

● 3:00-3:40 pm

➤ **Treat market overview:** Euromon-itor's data on treat sales and trends, presented by Bruce McKay, an ex-perienced industry professional.

● 3:40-4:10 pm Break

● 4:10-4:50 pm

➤ **Functional ingredients in treats:** Greg Aldrich, PhD, of Pet Food & Ingredient Technology Inc. on pop-ular functional treat components.

● 4:50-5:30 pm

➤ **Treat production innovations:**

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Paul McKeithan of Aeroglide shares his experiences and R&D work.

● **5:30-6:30 pm** Reception

Thursday, April 19

● **7:00-8:00 am** Breakfast

● **8:00-8:40 am**

➤ **Treats for other species:** Andrew Messenger of Vitakraft looks at treat market development for species other than dogs and cats.

● **8:40-9:20 am**

➤ **Case study—Greenies:** Tiffany Bierer, PhD, of Mars PetCare reports on biometric research that led to the reformulated Greenies treats.

● **9:20-10:00 am**

➤ **Packaging—new ideas for treats:** Major themes are convenience, merchandising and moisture and aroma barriers.

● **10:00-10:30 am** Break

● **10:30-11:10 am**

➤ **Treats for dental health:** Jennifer Larsen, DVM, of Davis Veterinary Medical Consulting covers the science behind dental health treats.

● **11:10-11:50 am**

➤ **Regulatory issues with treats:** David Dzanis, DVM, PhD, of Dzanis Consulting explains additional regulatory issues for treats with added nutrients. ●

Petfood Forum 2007 exhibitors

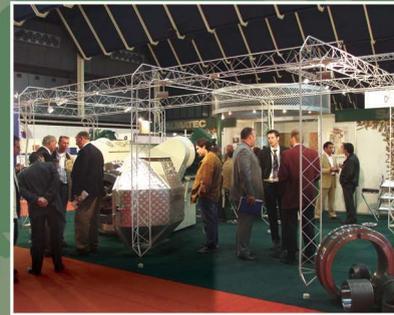
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Examining regulatory concerns

Regulatory experts discuss BSE and other issues affecting petfood manufacturers

BY JENNY KVAMME, DVM

Petfood products are closely regulated by government agencies around the globe. Regulations are continually being created and modified, which can present a challenge when it comes to keeping track of all the main issues of concern. *Petfood Industry* asked several groups what regulatory issues topped their list of current concerns and why. We talked to private consultants, manufacturer's associations, government agencies and industry associations to get their input (see p. 32). Their answers to two questions follow.

Q. What regulatory issues have been taking up your time lately, and why are these issues of current concern?



Dzanis:

For me, as the AAFCO Pet Food Committee Advisor for the American College of Veterinary Nutrition, the single specific issue has been the College's proposed amendment of

AAFCO PF9 to require calorie content statements on all dog and cat foods. The calorie content statement is arguably the most important individual piece of nutritional information on the label,

not only for dogs and cats with "weight issues." Requiring such information will help pet owners and veterinarians choose the most appropriate product for an individual animal. Petfood companies will benefit by creation of a level playing field and generation of goodwill with consumers.

Ekedahl: The continued problem with exporting US-made petfood into China, due to that country's registration requirements. PFI has also been working to correct ingredient prohibitions in a variety of countries stemming from the discovery of BSE in North America. Domestically, PFI continues to work with AAFCO and FDA on labeling and product claim issues. We have spent a great deal of time combating unfair and potentially damaging petfood tax proposals in some states, none of which passed during last year's legislative sessions.

PFI's work with AAFCO on petfood labeling issues resists those that are not needed to show the safety of petfood products—such as the request for mandatory calorie statements on all petfood and treats.

Harrison: Review of Animal By-Products Regulation 1774/2002 (ABPR) has been an important issue for us (PFMA) over the last few months, as it regulates the use of animal-based raw materials for the production of petfood. Since ABPR came into effect in 2003, industry and regulators have worked to reduce the anomalies and inconsistencies in the existing legislation. The European Union (EU) Commission has

decided to rewrite the legislation.

PFMA has also been working with FEDIAF (the European Pet Food Federation) on the *Guide to Good Practice for the Manufacture of Safe Pet Foods*. The guide will support petfood manufacturers in complying with requirements in Feed Hygiene Regulation 183/2005 EC, which came into effect in January 2006.

The EU Commission has promised to deliver the first draft of the review of the new Marketing Directive. This review will impact the marketing of animal feed, including petfood, and it is important we work with the Commission and national authorities to achieve a workable solution. The industry is concerned that certain ideas designed for farm animal feed could have a negative impact on the labeling of petfood. We need to ensure the unique position of petfood is recognized and reflected in the labeling requirements.

Plant: One of the major concerns for new businesses in Europe is the new set of EU Feed Hygiene Regulations (183/2005/EC). The interrelationship between this regulation and the Marketing Directive (79/373/EEC, as amended) requires the plant/business registration/approval number to be included in the statutory declaration.

The new regulations apply to all



feed businesses (including petfoods) that are manufacturing, importing, storing, transporting and selling (excluding actual retailing) products, while its predecessors (Directives 95/69/EC and 98/51/EC) only applied to manufacturers handling particular additives or premixes of certain additives (in petfoods).

The difficulty has been in identifying which registration or approval number should be declared on the package. This is particularly an issue when considering that many new and existing businesses are importing products from plants not previously requiring registration/approval under 95/69/EC or 98/51/EC. Further clarification of the rules for compliance with EU Feed Hygiene Regulations for non-EU-based manufacturing plants importing into the EU are expected during 2007.

Sellers: Issues include record-keeping for the Bioterrorism Act; the animal disposal effects of potential BSE rule changes; glycerin and distiller's dried grains with solubles use in

feed and petfood; cloning; dioxin findings and conferences; ingredient approval slowdown; and EU feed hygiene regulation—among others. These issues play a role in market demands, as well as potential and new regulation changes.

Syverson: First, the use of illegal/unapproved substances in animal feed, rendering the product misbranded and/or adulterated. A subset of this type of violation is the use of approved substances for unapproved purposes. Second, claims made in labeling, or established by the intended uses of additives, which define the product as a drug where the additive is not an approved new animal drug—thereby rendering the product misbranded and/or adulterated.

These issues are important because safety, efficacy and utility are paramount to proper nutrition. Performance claims and any indication that a petfood product is intended or implied to treat, mitigate, prevent or improve conditions or diseases where the product is not approved for these purposes can lead to inappropriate customer diagnosis, misdiagnosis and delayed treatment.

In many cases, basic consumer fraud is the issue where misbranding occurs. Another aspect would be an issue for responsible businesses. A manufacturer, distributor or guarantor is incurring some risks in using unapproved substances, or making inappropriate claims, with regard to product liability and their relationship with their product liability insurance carrier. Self preservation includes being in compliance with the applicable regulations.

Wilder: Since 2003, when Canada had its first case of BSE, many markets have been closed to Canadian petfoods, or if open, have had rigorous export rules. As a result, Canada has made some significant announcements during the past year, including enhancements to our Feed Ban, which will include, for the first time, petfoods.

New BSE import rules will require

exporters to meet import criteria that will include import permits and health certificates. Since a very large volume of petfood comes into Canada from the USA, the new requirements place significant strains on both industry and government, which must take on a new inspection role as well as sign health certificates.

The costs of meeting these new BSE rules are significant. Also, the level of inspections and paperwork required will rise dramatically. Whether these changes will result in a disruption of trade is always a concern.

Q. What do you see as up-and-coming issues?

Dzanis: With publication of the new NRC recommendations, revision of the AAFCO Dog and Cat Food Nutrient Profiles is anticipated. New feed safety initiatives from AAFCO and FDA will also greatly impact petfood manufacturers.



Ekedahl:

We will no doubt see more in terms of organics, natural products and novel materials. We are fortunate to have Nancy K. Cook, PFI's vice president of technical and regulatory affairs, chair-

ing the group working on the USDA organic petfood rules. As this group's work proceeds, PFI and its members will have direct involvement in the formulation of the organic rules, since this is such a growing segment.

Harrison: The Marketing Directive is the last major piece of legislation to be reviewed under the European Commission's white paper on food safety published in 2000. This review will keep industry busy for the coming months or even years. Thereafter, we will work to ensure existing legislation is correctly enforced across Europe.

We talked to:

- ▶ **David Dzanis, DVM, PhD, DACVN**—founder of Dzanis Consulting and an independent consultant on veterinary nutrition, labeling and regulation.
- ▶ **Duane Ekedahl**—executive director of the Pet Food Institute (www.petfoodinstitute.org).
- ▶ **Nicole Harrison**—Pet Food Manufacturers' Association of the UK (www.pfma.org.uk).
- ▶ **Terry Plant**—founder of TA Plant Consulting.
- ▶ **Richard Sellers**—vice president of feed regulatory and nutrition for the American Feed Industry Association (www.afia.org).
- ▶ **David Syverson**—chair of the Association of American Feed Control Officials (www.aafco.org) Pet Food Committee.
- ▶ **Marty Wilder**—executive director of the Pet Food Association of Canada (www.pfac.com).

Plant: The development of new regulations will be an area of major activity throughout 2007. Other major changes expected are a rewrite of the Animal By-Products Regulation 1774/2002/EC. This could lead to a number of modifications to definitions, particularly concerning the categories of raw materials (I, II and III).

Other aspects that may change include the introduction of new veterinary health certificates for the import of animal materials and products containing animal materials into the EU.

It is also anticipated that the procedure for applying for the continued use of additives will be published. This will be a major activity area over the coming years for those involved in supplying or using additives in the manufacture of petfoods.



Sellers:

Other than the Bioterrorism Act, which is fully implemented, all the others I mentioned will continue to be of concern.

Syverson:

Regulators see trends come and go all the time. Regulation is primarily reactive. Laws are written and rules are promulgated as the result of someone doing something that they should not have. The degree to which the industry decides to comply with the laws and regulations will determine what happens in the future.

Wilder: The volume of regulatory issues we are dealing with has risen so drastically in the last three years that there is hardly a moment when we're not seeing something new and of concern to our industry. Often, our industry is pulled into the scope of regulations, even though all common sense would remind regulators of the minimal risk—and the long record of safety—our products represent. Getting that message through often takes a great deal of time and effort by our industry. ●

Cheese Plus Cheese Product Palatability for Dogs

Product	% of intake
Control	12
Cheese Plus	88

Dogs showed a 7.3 to 1 preference for a commercial diet supplemented with Cheese Plus.

(research available upon request)

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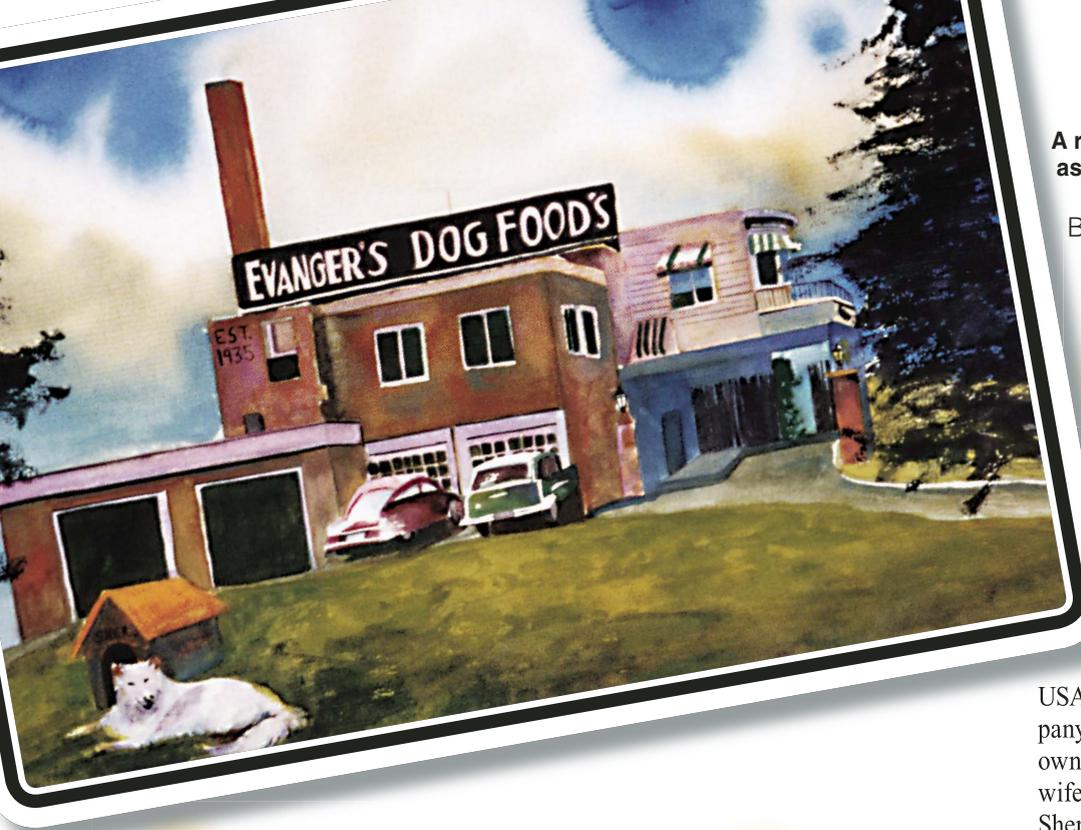
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A rendition of the Evanger's plant as painted by Holly Sher.

BY JENNY KVAMME, DVM

Since its beginning in 1935, Evanger's Dog & Cat Food Co. Inc. (www.evangers-dogfood.com) has grown from a primarily private label manufacturer to one now producing some of the most innovative products on the market.

Founder Fred Evanger raised Great Danes and decided to build a canning factory in close proximity to his kennels in Wheeling, Illinois, USA. Over the past 70 years, the company has turned over twice and is now owned and operated by husband-and-wife team Holly (president) and Joel Sher (vice president). The Shers purchased the company in 2002.

Joel was previously an independent supplier of meat and vegetable products to Evanger's, and when the chance to purchase the plant came about, he and his wife took on the challenge. Joel, having supplied Evanger's with raw meat for over 15 years, knew the company produced a quality product. Since Holly and Joel took over, Evanger's has experienced 300% growth and now produces about 50 products.

Private label history

Evanger's started supplying the private label market in the early 1960s, and that had become the bulk of the company's business over the years. The Shers have been determined to grow the Evanger's company brand into a significant player in the petfood market. Thus, they have developed many new and innovative products for the Evanger's line. Today, the Evanger's brand accounts for approximately 50% of the company's overall business, but not due to a decline in private label sales.

According to Joel, "Consistent, top-quality products and excellent customer service are just two of our strong points. Being a small manufacturing company enables us to work closely with our accounts to ensure their satis-

Innovation leads to growth for Evanger's

Husband-and-wife team
develop natural, organic and
kosher products

faction.” Most ingredients are sourced locally by Sher and are procured and processed in a very short time.

Formulating innovative products

With the help of consultant/formulator Joe McGrath, Joel has been the creative force behind the evolution of the Evanger’s line. The innovative wet dog food products they’ve launched include Super Premium Gold Dinners, Hand-Packed Specialties, Organic, 100% Meat and Game Meats. According to Sher, they are made from high-quality, human-grade ingredients, with no additives, preservatives or by-products.

Evanger’s superpremium Hand-Packed foods are indeed packed by hand in order to “maintain the shape and nutrients of each recipe’s contents,” according to the company website. The recipes include bones and solid chunks of meat, including whole fish. All recipes with bones undergo retorting, which softens the bones, rendering them edible, soft and digestible. The company’s hand-packed line has a unique look, resembling a home-cooked stew. The products include Chunky Chicken Casserole, Whole Chicken Thighs, Whole Mackerel with Gravy, Roasted Chicken Drumette Dinner, Braised Beef Chunks with Gravy and Hunk of Beef.

Kosher, organic and more

The dog and cat foods from Evanger’s offer Jewish pet owners an option at Passover. Evanger’s food is suitable for kosher events or homes, according to Holly. The Chicago Rabbinical Council has even approved the food Evanger’s has created suitable for all Jewish holidays, including Passover.

Evanger’s also offers organic meals, such as the 100% Chicken and Turkey with Potatoes & Carrots Dinner and the Organic Turkey & Butternut Squash Dinner for cats. Evanger’s production facility has been certified by the Organic Crop Improvement Association (OCIA) to produce 100% organic products. OCIA International is one of the world’s oldest, largest leaders in the organic certification industry. A

nonprofit, member-owned, agricultural organization, OCIA provides organic certification services and access to global organic markets, according to the organization’s website (www.ocia.org).

Evanger’s 100% natural Game Meat and poultry line (marketed as hormone and antibiotic free) supplements its dry dog foods—Dog Food with Chicken, as well as Pheasant and Brown Rice.

Future plans

With a 7,000-square-foot expansion of the original Evanger’s manufacturing and warehouse facility, on the site where the founder’s Great Danes once swam in their own private pool, the company has seen its sales triple (compared with 2002). The plant currently produces 60,000 pounds of product each day, manufacturing over 15 different product recipes in small batches. With a short turnaround time, the plant usually cans and labels the product for shipping the same day.

By the end of 2003, production was at full capacity for a single shift of 10 hours. This year, the company plans to staff another full line, nearly doubling its workforce of 45 employees. With future relocation and a new plant under discussion, the Shers have big plans ahead.

Talking to their customers helps Holly and Joel keep abreast of the trends that will do well in the marketplace. “We see the first glimpses of the industry and try to adapt to them quickly,” said Joel. ●

One of the Hand-Packed Specialties from Evanger’s—Braised Beef Chunks with Gravy—includes pieces of beef with peas and carrots together with pasta and gravy.



Joel (left) and Holly Sher represent their products to the pet industry at various industry events.

Business basics

Headquarters: Wheeling, Illinois, USA.

Officers: Holly Sher, president; Joel Sher, vice president.

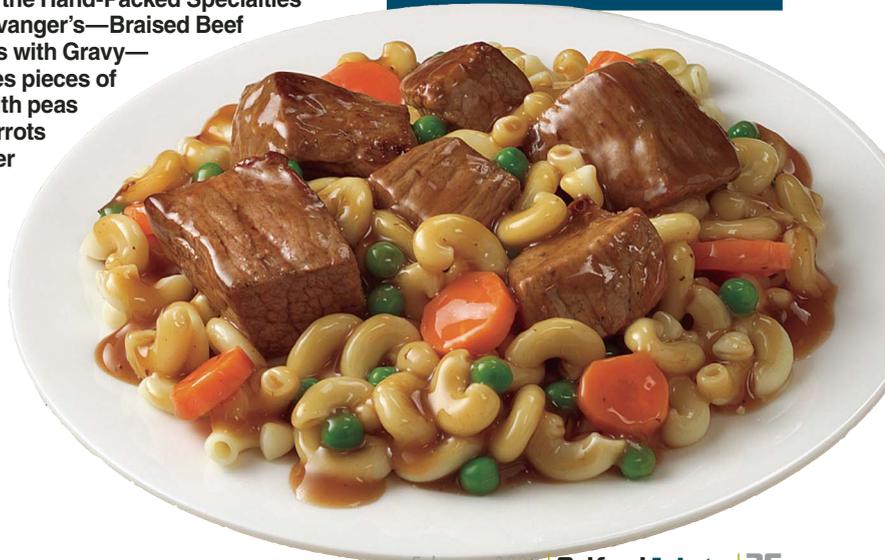
Annual sales: The company has grown 300% since the Shers purchased it in 2002. Total sales undisclosed.

Brands: Super Premium Gold Dinners; Hand-Packed Specialties; Organic; 100% Meat Classic Line; Game Meats; Complete Classic Dinners; Super Premium Cat Dinners; Gourmet Classic Cat Dinners.

Manufacturing: One canning facility in Wheeling; dry dog food contracted.

Employees: 45

Website: www.evangersdogfood.com



The “complete and balanced” petfood: is it a myth?

In my research for last month’s commentary on the Association of American Feed Control Officials (AAFCO), I ran across a long-argued premise made by someone in the petfood industry that there is no such thing as a “complete and balanced” petfood. In the writer’s opinion, no single commercial food is truly suitable to serve as the sole source of nutrition, so any implication to that effect for a product is no less than blatant consumer fraud. Further, the case is argued that regulatory bodies are complicit with industry in perpetuating this myth to the detriment of the pet’s health.

Is there any basis to this contention? If so, should AAFCO abandon its efforts to define “complete and balanced” and in effect force all petfoods to be “for intermittent or supplemental feeding only”? AAFCO intends to revise its Dog and Cat Food Nutrient Profiles in the near future.

The argument against

A synopsis of the reasoning to proclaim “complete and balanced” petfood to be a myth can be found at www.wysong.net/PDFs/100complete.pdf (URL is case sensitive). Briefly, the argument is that nutrition is not a complete science. Moreover, by its very nature, our understanding of nutrition will never be completely known. Therefore, any claim that a product offers complete nutrition is a farce, and always will be a farce. Examples of cases where consumption of commercial products previously deemed to be nutritionally adequate resulted in deficiencies are given to support the premise.

Why label products as “complete and balanced,” then? Well, it is argued

I see a noble, conscientious effort to offer sensible guidance to consumers.

— David Dzanis



to be the result of a combination of arrogance and greed. Petfood companies want pet owners to feed their foods, period. Government wants to facilitate industry desires. Simply put, no one cares about the pets that eat the products, and they suffer as a result.

My response

I wholly agree with the premise that nutrition is not a complete science. However, contrary to the writer’s assertion, I don’t know any pet nutritionist who has opined otherwise or would ever support the idea that “all is known.” After all, if it were a complete science, there’d no longer be any need to train new nutritionists or do further research. That’s simply not the case.

For example, we think we have a decent understanding of vitamin D’s role in calcium metabolism, but it functions in many other ways as well that are presently only vaguely appreciated (e.g., cell differentiation, cancer, other chronic diseases). Also, there are literally dozens of vitamin D metabolites in the body. We only know about the functions of a few of them. What are the rest of them doing? The roles of carotenoids and other antioxidants, ultra-trace minerals and fibers in pet nutrition are only a few more examples where the possibility for study is ripe.

We know a lot

On a practical basis, though, we know a heck of a lot. While there’s constant subtle refinement of established requirements, research sufficient to demonstrate dietary essentiality of new substances gets tougher every day. Even with use of very refined experimental diets, the ability of scientists to detect evidence of nutritional deficiency becomes extremely difficult. Commercial diets, on the other hand, are formulated with ingredients containing very complex mixtures of substances. So, although formulated on the basis of known nutrient content, the nature of these complex ingredients generally provides for the needs of these yet-to-be discovered or appreciated nutrients as well. Thus, even if we don’t understand everything, in most cases it doesn’t make a practical difference.

I also agree that since we will never truly know all, there is no way to completely, unequivocally guarantee with 100% certainty that a given product will fully meet the nutritional needs of every individual animal to which it is fed. This is not a new concept; I’ve previously referred to the AAFCO Profiles, feeding trials, etc., as “reasonable assurances” of nutritional adequacy. However, that does not mean the effort to define what is meant by “complete

and balanced” based on current understanding has no merit.

The need for standards

Although “complete” assurance is infeasible, if not a scientific impossibility, there still needs to be a way to differentiate the reasonable from the unreasonable. In other words, the true purpose of these standards is to weed out the products that are far more likely to be nutritionally inadequate based on what we do know.

Failure for a product to meet the AAFCO Profiles and/or feeding trials, as imperfect as they may be, should be taken as a sign for the pet owner not to trust nutritional claims for that product. Where the writer sees greed and arrogance, I see a noble, conscientious effort to offer sensible guidance to consumers and protect pets from potential harm.

Yes, as we learn more, nutritional recommendations are tweaked, and in the process, some diets previously thought to be adequate are found not to be. In my opinion, the alternative to enforcement of some form of nutritional standards, i.e., to throw up our hands and say nothing’s “complete,” will do more harm than good in terms of protecting pets’ health.

Sound principles lacking

Without some yardstick for comparison, there is no way of telling the reasonably good from the absolutely terrible. The advice to “use the same common sense in feeding your pets that you use for feeding your family” and “fresh foods fed in variety are always superior” doesn’t help, either. I’ve seen multitudes of pet diets (especially recipes for homemade formulations) where adherence to sound nutritional principles is sorely lacking. Some are grossly deficient in meeting the most basic nutrient needs. Also, I’m not sure how much common sense is out there.

Notwithstanding attempts to eat a fresh variety of foods, I suspect that my dogs and cats are eating a much closer to “complete” diet than I am, and assume that’s the case in many other households as well. In summary, while I respectfully appreciate the opinion of the writer

and in fact agree with some aspects of it, I think the blanket disparagement of efforts to define “complete and balanced” petfoods is totally unwarranted. While we will most likely never know everything there is to know about pet nutrition, the pursuit of that ideal is a laudable goal. ●

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

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Sorghum: poor-man's corn or novel carb?

Sorghum or milo, as it is sometimes called, originates from northeast Africa and Asia and is a close cousin to millet and (sugar) cane. It is a perennial grass commonly grown as an annual grain crop in more arid climates where moisture and rainfall patterns are less conducive to the production of warm season crops like rice, corn or soybeans. Globally it is the fifth-most important grain (around 60 million tons produced annually) with the US, India and Nigeria being the top three producing countries (FAO, 2005).

Nutrient composition and utilization

The nutrient profile of sorghum compares favorably to corn, with starch being the largest portion (around 75%). Most of the starch is in the form of amylopectin (70-80%). The protein content is slightly higher than corn (at or above 9%) with lysine and threonine being the first and second limiting amino acids. The fat content of sorghum is slightly lower (about 3%) than corn, which is in part responsible for its lower metabolizable energy.

The essential fatty acid linoleic acid (C18:2n6) comprises greater than half the total fatty acids and another third comes from oleic acid (C18:1n9). Less than 3% of the total fatty acids come from the omega-3 linolenic acid (C18:3n3). The fiber fraction (crude fiber 2-3%) is primarily insoluble with measurable amounts of lignin (primarily ferulic and p-coumaric acid) in the seed coat. The mineral (ash 1-2%) and vitamin content are comparable to many other cereal grains.

Sorghum for dogs, cats

Several researchers have evaluated the use of sorghum in extruded dog and

The upside is not all condensed tannins are the same.

— Greg Aldrich



cat diets. In dogs, the extent of starch digestibility was reported to be similar to that of other grains like corn or rice (Carciofi *et al.*, 2004; Twomey *et al.*, 2002; Murray *et al.*, 1999). The *in vitro* work of Murray *et al.* (2001) suggested that the rate of starch digestion might be slower due to the composition of the sorghum starch. Corroborating evidence of this, albeit indirect, has been reported with intravenous glucose tolerance tests. In studies with dogs (Carciofi *et al.*, 2004; Sunvold and Bouchard, 1998) and cats (Bouchard and Sunvold, 2000) fed extruded sorghum-containing diets, concentrations of glucose were lower, time to peak glucose was longer, and the insulin response curve was dampened after a test meal containing sorghum rather than rice or corn.

Sorghum processes much like corn or rice and expands well in extruded diets. For specialty markets, sorghum is gluten free and is currently non-GMO. However, despite what appears to be a generally good report card, there are very few petfood companies that use or promote sorghum as part of their foods. The question then is why?

Condensed tannins

The answer undoubtedly rests with sorghum's reputation as poor-man's corn, a name earned through some

less-than-stellar feeding studies in which digestibility and performance of livestock compared unfavorably to corn. Why does this contradict the results noted above for dog and cat foods? The answer lies at the surface—the seed surface that is. For commercial trade, sorghum is classified into several groups based primarily on the seed coat (pericarp) color.

In its simplest interpretation, sorghums are either “tannin” (brown), white or a couple of incremental combinations of the two. The tannins, though not actually tannic acid like the name would suggest, are more accurately proanthocyanidins, or for simplicity “condensed tannins.” All sorghums contain these condensed tannins—some more than others.

These condensed tannins are a cauldron of different poly-phenolic compounds produced as secondary metabolites by the plant. They support the plant's natural defense system against insect predation and mold infestation. Some sorghum varieties have been selected to better exploit these benefits (i.e., brown “bird resistant milo”). However, there is an off-setting drawback as some of the condensed tannin sub-fractions precipitate proteins, inhibit digestive enzymes (amylase inhibitor, trypsin inhibitor) and bind (chelate) trace

minerals. Because of this, it has been common to consider condensed tannins as anti-nutritional factors to avoid, especially the tannin (brown) sorghums.

The upside is that not all condensed tannins are the same. Recent research has shown that sorghum proanthocyanadins may impart health benefits. For example, the hydroxycinnamic acid and flavonoid fractions of these condensed tannins have anti-tumor (esophageal, colon), anti-viral (HIV), melanogenic and satiety effects. The flavonoid pigments (blues, purples and reds) are process-stable natural food colorings.

Further, the antioxidant properties of many of the phenolic compounds impart to sorghum a greater antioxidant capacity than found in some fruits and vegetables commonly thought to be antioxidant rich (e.g., plums, broccoli, carrots, etc.; Dykes and Rooney, 2005). Since condensed tannins are not a single compound, but rather a host of many, there is an opportunity to identify and select sorghums for beneficial properties at the expense of the anti-nutritional properties.

Sorghum's potential

In the meantime, thermal processing such as extrusion and steam flaking and chemical treatment with alkali can improve performance of tannin sorghums. Currently, low tannin varieties (white, red and yellow sorghums) are more common and can be used effectively in dog and cat diets as a key ingredient in mainstream conventional diets, as well as a vital part of a diabetic and weight control regime. On the horizon, there may be opportunities to exploit the antioxidant and nutraceutical benefit of sorghum in petfood once the condensed tannin story is better clarified.

If this comes to pass, sorghum might emerge from the cloud of poor-man's corn to that of hot new novel carb. ●

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Research Notes

Adipose fatty acid composition in lipoprotein lipase-deficient cats

Normal animal fat occurs in humans and mice deficient of adipose lipoprotein lipase (LPL) activity. Subnormal adiposity

Key Concepts

► Adipose fatty acid composition in lipoprotein lipase-deficient cats

(*J Nutr* 136:2980-2986): Data indicate that LPL deficiency in cats reduces dietary FA storage efficiency, favors storage of saturated over unsaturated FAs and stimulates new FA synthesis substantive enough to support normal adiposity.

► Cystine intensifies effect of a methionine deficiency in the cat

(*JAPAN* 90(11-12):440-445): Results showed that a diet severely deficient in methionine causes perioral lesions in kittens, and that addition of excess cystine to the diet aggravates the perioral lesions and also causes foot pad lesions.

found in LPL-deficient cats is indicative of limited new synthesis of fatty acids (FAs). In 14 LPL-deficient (3.0 ± 0.1 kg) and eight normal (3.7 ± 0.1 kg) queens, FAs in triacylglycerol (TAG), phospholipid (PL) and non-esterified FAs (NEFAs) of plasma and inguinal subcutaneous adipose were determined before and after (day 38, 61, 110, 117 and 251) dietary linseed oil supplementation (30 g/kg). By day 60, LPL-deficient queens gained body weight ($+0.4 \pm 0.1$ kg), developed normal body fat mass ($25 \pm 2\%$) and were enriched in 18:3(n-3) in their plasma and adipose lipids.

Study results indicate that LPL deficiency in cats reduces dietary FA storage efficiency, favors storage of saturated over unsaturated FAs and stimulates new FA synthesis substantive enough to support normal adiposity.

Source: Veltri, B.C., et al., 2006. Adipose fatty acid composition and rate of incorporation of alpha-linolenic acid differ between normal and lipoprotein lipase-deficient cats. *J Nutr* 136:2980-2986.

Cystine intensifies effect of a methionine deficiency in the cat

Foot pad dermatitis has been observed in turkeys, puppies and kittens fed diets deficient in methionine. Excess cystine aggravated the lesions and decreased body weight gain in puppies and turkeys. The objective of this study was to determine whether methionine deficiency induced perioral and foot pad lesions in kittens and whether excess cystine exacerbated the lesions. Eighteen kittens were divided into three groups and offered one of three diets: diet 1, low-methionine, low-cystine (LMLC; 1.6 g methionine and 1.6 g cystine/kg diet); diet 2, low-methionine, high-cystine (LMHC; 1.6 methionine and 15 g cystine/kg diet); diet 3, high-methionine, high-cystine (HMHC; 15 g methionine and 15 g cystine/kg diet).

Kittens in the LMLC group lost body weight, whereas those in the LMHC group maintained their body weight and those in the HMHC group gained weight. Plasma methionine concentrations were significantly higher ($P < 0.001$) for the HMHC group than for the LMLC and LMHC groups. Plasma cyst(e)ine (sum of cysteine and cystine) concentrations were different ($P < 0.001$) among all three groups. Two kittens given the LMLC diet developed mild perioral lesions. All kittens receiving the LMHC diet developed foot pad lesions and severe perioral lesions. Histopathological changes observed in perioral biopsy specimens were similar to those described in protein deficiency. Results showed that a diet severely deficient in methionine causes perioral lesions in kittens, and that addition of excess cystine to the diet aggravates the perioral lesions and also causes foot pad lesions.

Source: Strieker, M.J., et al., 2006. Excess dietary cystine intensifies the adverse effect of a methionine deficiency in the cat. *JAPAN* 90(11-12):440-445.

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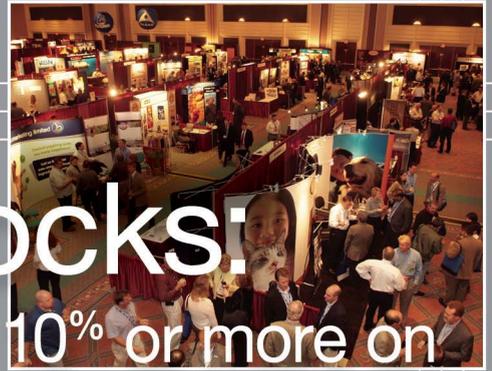
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Vibratory boot-mounted rotary feeders

A new line of boot-mounted rotary feeders for retrofitting on existing bucket conveyors or bucket elevators has been introduced by Gough Econ Inc. The new rotary feeders are easy to install and retrofit on all bucket conveyors from 9 inches to 48 inches wide, says the company. They are powered by two vibratory motors mounted directly onto the load unit of existing bucket conveyors or elevators.

Gough Econ Inc., P.O. Box 668583, Charlotte, NC 28266-8583 USA, Tel: +1.800.264.6844, Fax: +1.704.392.8706, E-mail: sales@goughecon.com, Website: www.goughecon.com.

Shrink labeler provides flexibility



PDC International has introduced a heavy-duty, highly flexible shrink sleeving machine that runs both tamper-evident neckbands and shrink-sleeve

labels. Marketed as the R-200 Evolution series, this system is engineered for continuous operation at speeds between 50 and 200 cpm. It provides precise graphic orientation and accommodates sleeve diameters from 38 mm to 175 mm (sleeve height of 67-250 mm). Containers can be filled or empty, and the R-200 Evolution's product handling system accommodates virtually any product size and shape, including round, oval and square packages.

PDC International, 8 Sheehan Ave., South Norwalk, CT 06854 USA, Tel: +1.203.853.1516, Fax: +1.203.854.0834, Website: www.pdc-corp.com.

Bench-top O2 analyzer

Mocon Inc. introduces the Pac Check Model 840 Package Integrity Test System. The bench-top Model 840 calculates an oxygen headspace reading, along with the real and accurate leak rate of a package. The system produces an absolute leak number based on the application of

Poiseuille's law, which yields a total "hole" diameter leak size based on measurements of pressure and flow.



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

► **Expo Zoo**, March 18-20, 2007, Paris, France. Contact: Expo Zoo, 45 Ave. George V, 75008 Paris, France, Tel: +33.1.53.57.62.24, Fax: +33.1.53.57.62.01, E-mail: Veronique.oury@europ-expo.com, Website: www.expozoo.com.

► **Animal Agriculture Alliance Stakeholders Summit**, March 19 – 21, 2007, Sheraton Crystal City Hotel, Arlington, Virginia, USA. Contact: Animal Agriculture Alliance, Tel: +1.703.562.5160, Fax: +1.703.524.1921, Website: www.animalagalliance.org.

► **Japan Pet Fair**, March 29-April 1, 2007, Pacifico Yokohama, Tokyo, Japan. Contact: Tomo Miura, Tel: +81.3.3512.5674, E-mail: jpf2007@smj.co.jp, Website: www.jpjpa.or.jp/2007jpf/e/index.html.

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► **Petfood Forum Europe**, co-located with Victam International, May 8, 2007, Utrecht, Netherlands. Contact: Marcia Riddle, Watt Publishing Co., 122 S. Wesley Ave., Mt. Morris, Illinois 61054 USA, Fax: +1.815.734.5631, E-mail: mrriddle@wattnet.net, Website: www.wattnet.com/petfoodforum or www.victam.com.



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Could petfood become part of the clone wars?

About this time five years ago, the cloning of the first domestic cat set off a lot of buzz and controversy. Now the company behind all that, Genetic Savings and Clone, is out of business, according to its website. But people wishing to preserve their pets' DNA for possible future cloning have several other companies to turn to, some of which—ViaGen and Cyagra, for example—are involved in cloning livestock.

These animals are at the center of the latest round of the clone wars, a battle jump-started by the US Food and Drug Administration's (FDA) announcement at the end of 2006 that it considers products from cloned livestock safe for human consumption. The agency's draft risk assessment that meat and milk from clones of adult cattle, pigs and goats (and their offspring) are "as safe to eat as food from conventionally bred animals" could pave the way for approval of the sale of such products (see www.fda.gov/cvm/cloning.htm). If this happens with food for humans, is it a stretch to imagine products from cloned animals going into petfood?

Not a done deal

The FDA announcement by no means ensures we'll soon be eating steak or drinking milk from cloned cows, let alone that our pets will. The agency will collect public comment on the draft risk assessment and its related documents for 90 days, then weigh that and other input in releasing a final report, expected by the end of the year. Even if that leads to approval of the sale of meat and dairy products from cloning, those products wouldn't appear in supermarkets for at least five years, experts say.

Is it a stretch to imagine products from cloned animals going into petfood?

— Debbie Phillips-Donaldson



Proponents of cloning insist it's just one more tool, like artificial insemination, to help farmers breed their best animals and pass along desirable traits such as disease resistance and higher-quality meat. Because cloned animals are still rare and worth a lot of money, any food resulting from cloning would probably come from sexually reproduced offspring and descendants of clones (see www.agweb.com).

Unfavorable ratings

Consumers' perspectives, however, still seem to lean negative:

- ▶ A 2006 study from the International Food Information Council (www.ific.org) shows that 59% of US adults give animal cloning an unfavorable rating, 46% are unfavorable toward the use of cloned animals for breeding and 58% say they're unlikely to purchase foods from cloned animals or their offspring.
- ▶ *National Geographic.com* reports a December 2006 survey by the Pew Initiative on Food and Biotechnology showing that 64% of respondents are uncomfortable with animal cloning and 43% believe "cloned food" is unsafe.
- ▶ A 2006 survey by the International Dairy Food Association (www.idfa.org) found that 14% of women

shoppers would boycott all dairy products if milk from clones is introduced into the food supply.

Would people feel the same about their pets' food? My guess is yes. And questions over approval and acceptance don't end at US borders; if products from cloning enter the US human or petfood supply, what would that mean for their exportation prospects?

Another FDA notice

Despite the ethical and safety concerns, I don't believe this issue is likely to go the way of pet cloning—a fleeting, well-hyped trend or quirky extravagance. (As much as I miss my recently deceased cat, I wouldn't go to the trouble or expense of cloning her or banking her DNA.) It will bear watching whether food products from cloned animals end up on retail shelves.

Meanwhile, the FDA has also announced approval of Pfizer Inc.'s Slentrol, the first prescription weight-loss drug for dogs. So perhaps a more immediate concern for the industry is how pet owners are overfeeding products currently on the shelves. ●

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

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