

May 2007

Petfood Industry

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Great brands, great future

**Del Monte focuses
on powerful trends, p. 16**

**Petfood 2011:
the global outlook**

**Recalls: learning from
a sad and messy crisis**

**Automating
petfood safety**

Jeff Watters, senior vice president of Del Monte Pet Products, and Nova.



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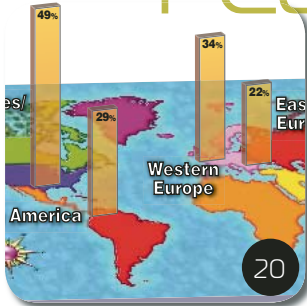
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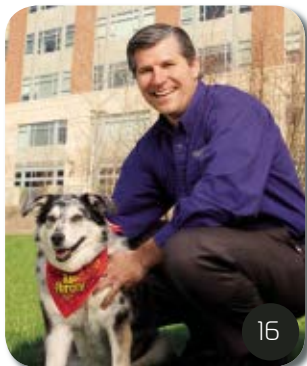
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Photo by Karen Meyers Photography (www.karenmeyersphoto.com).

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Humanization: both sides now

The humanization of pets has been enormously positive for the petfood industry. However, there's another side to humanization, as we're seeing now in the wake of numerous petfood recalls.

People, especially those who pay for higher-priced petfoods, often think of their pets as "furry kids." So if a pet dies from eating contaminated petfood, many owners tend to think they should be able to collect damages for pain and suffering. Most states in the US do not agree. They treat pets as personal property, just like cars and computers. But that could be changing.

Giving pets humanlike legal status

Lawsuits filed by owners of dogs and cats that may have died from eating contaminated petfood could press lawmakers and courts to upgrade pets' legal status. "You'll see a lot of pressure on legislators to remove liability barriers, to not see these animals as property but as entities like humans," says Jon Katz, the author of several books on pet/people relationships.

Some barriers have already been removed. Appellate court decisions in at least six US states permit damages for emotional distress in some instances. The state of Rhode



This is the kanji symbol for crisis. It is composed of two elements: one is danger, the other is opportunity.

Several cities have legally defined pet owners as guardians—in effect equating pets with children.

— Tim Phillips



Island and several cities have legally defined pet owners as guardians—in effect equating pets with children.

Katz warns that giving pets humanlike legal status could create troublesome consequences for veterinarians, petfood and toy companies, shelter operators and perhaps even pet owners themselves. For veterinarians, it could translate into higher malpractice insurance premiums and more defensive medicine (higher veterinary bills).

The idea pet owners are entitled to damages for emotional distress reflects what Katz calls a seismic shift in people's relationship to pets. Giving pets a humanlike legal identity might lead to higher liability awards if, for instance, a dog chokes on a chew toy, an airline misroutes a cat or an animal dies in a car accident. Parties who want to represent the rights of pets could step in and object to euthanasia. Says Katz, "I don't think people have thought through the consequences here."

Back to the present

Because of the recent recalls, I think most petfood companies will adopt food safety systems that are as good as those in human food plants.

They'll probably promote this on their packaging with messages like "Food safety ensured by HACCP?"

How you respond to this industry-wide challenge will determine if and how you recover. Oriental wisdom asserts that every crisis carries two elements, danger and opportunity. No matter the difficulty of the circumstances, no matter how dangerous the situation, at the heart of each crisis lies a tremendous opportunity. Good fortune lies ahead for those who know the secret of finding the opportunity within each crisis.

It's time to act

"Let's set up an industry-wide crisis fund to help the pets and people affected by contaminated petfoods—no questions asked," said Brian Connolly, cofounder of Castor & Pollux Pet Works, at Petfood Forum 2007. I think he is right, and the sooner we do it the better. For more Petfood Forum quotes, see p. 31. ●

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

Nutrition for pets - business for you

BHJ PET FOOD IS A LEADING INTERNATIONAL COLLECTOR AND PROCESSOR OF ANIMAL BY-PRODUCTS AND RAW MATERIALS FOR THE PET FOOD INDUSTRY.

BHJ's pet food plants in Canada, the US, the UK, Lithuania and Denmark annually deliver up to 400,000 tons of meat and fish products for the pet food industry. More than 75 percent of the revenue is generated outside Denmark, delivering animal by-products, meat blends and digests for the world's leading manufacturers of dog and cat food.

Satisfied pets – Satisfied customers

"We use only fresh raw materials, and offer products and solutions enabling the customers to adjust their meat demands to their actual needs," says Ove Hansen, Senior Vice President of BHJ Pet Food. "And by providing reliable service, tailor-made solutions and just-in-time deliveries, we satisfy our customers. It's a combination that translates into good business for everybody."

Apparently it's a combination that works. BHJ's customers include some of the world's leading brands of cat and dog food, but to BHJ small customers are as welcome as big customers.

Stringent product quality

Quality management at BHJ Pet Food is based on GMP and HACCP principles. And only the highest

quality standards are met at BHJ laboratories and plants. BHJ continuously works with suppliers on formalized raw material specifications, raw material handling, storage and delivery requirements for production.

"We use significant resources for vendor assurance and production processes to meet the quality requirements of our customers. The ability to meet tracking and veterinary demands is a given and our absolute minimum requirement," says Ove Hansen.

Dependable supplier

BHJ's global market knowledge, network and direct access to fresh raw materials ensure stable supplies of first-class meat products from all over the world.

"Development and improvement of products and applications take place in collaboration with our customers – most of whom are long-term business partners," says Ove Hansen.

Adding value

Being a supplier for top brands and international players is demanding. BHJ strives to be the preferred partner in this industry and is therefore committed to providing quality and value in everything they do.

B H J

Founded in 1969, BHJ has its headquarters in Gråsten, Denmark. Within the pet food industry, BHJ specializes in three product areas:

- Animal by-products and meat blends for nutrition
- Digests for palatability
- Natural snacks for treats

BHJ is a subsidiary of the Lauridsen Group Inc. (LGI), an American company that also owns APC and Proliant.



Ove Hansen
Senior Vice President



Industry News

Petfood recall continues

Contaminants including a rodent poison, aminopterin, and a chemical used in manufacturing plastics, melamine, have been discovered in batches of petfood recalled by many petfood and pet treat manufacturers. Most recently, Royal Canin USA has determined there is a melamine derivative in the rice protein concentrate in some of its dry petfood products. Although Royal Canin USA (www.royalcanin.us) had no confirmed cases of illness in pets at press time, it decided to voluntarily remove all of its dry petfood products containing rice protein concentrate.

Royal Canin had recalled products made by contract manufacturer Menu Foods in Canada and also reported having received tainted corn gluten in

made by at least seven companies and sold under more than 100 brands. The source of the melamine remains unclear. For more on dealing with petfood recall situations, see page 28.

National Pet Food Commission formed

The Pet Food Institute (PFI) has announced the formation of the National Pet Food Commission, composed of nationally recognized veterinarians, toxicologists, state and federal regulators and nutritionists, to further strengthen industry procedures and safeguards in light of recent petfood recalls. The industry-government partnership will have two main goals:

- To investigate the cause of the current petfood recall.
- To recommend steps the industry and government should take to further build on safety and quality standards already in place.

Information on the National Pet Food Commission's charge and a complete list of commissioners is available at www.petfoodreport.com. At the conclusion of its work, the National Pet Food Commission will issue a report outlining its findings and offering its recommendations to the industry and regulators.

PFI President Duane Ekedahl announced formation of the National Pet Food Commission in mid-April during his testimony before the US Senate Appropriations Subcommittee on Agriculture, Rural Development, Food and Drug Administration and Related Agencies. Ekedahl was joined at the hearing by Dr. Angele Thompson, an expert in nutritional biochemistry and a member of the American Academy of Veterinary Nutrition, who will chair the National Pet Food Commission. Dr. Thompson said the commission had its first meeting in April.

Corbin memorial scholarship

In recognition of Dr. Jim Corbin's contributions to science and industry, a memorial scholarship fund is being established—the Dr. James E. Corbin Companion Animal Biology Scholarship—for students in the University of Illinois College of Agricultural, Consumer and Environmental Sciences. Contributions may be sent to: Louise Rogers, associate dean for development, 166 Bevier Hall, 905 S. Goodwin, Urbana, IL 61801 USA, +1.217.333.9355, elrogers@uiuc.edu (checks made out to the scholarship fund).

A pioneering companion animal scientist whose work more than half a century ago helped develop the Salk polio vaccine, Dr. Corbin died on March 1, 2007. He was a professor emeritus of animal sciences at the University of Illinois. "For good reason, many recognized Jim Corbin as the father of the modern petfood industry," said Neal Merchen, head of the Department of Animal Sciences. "He joined the department in 1973 and created a world-class program of companion animal research and teaching. Today, because of Jim's foundation, that program is considered to be the best in the world."



RECALL

South Africa. The Blue Buffalo Company voluntarily recalled one production run of its Spa Select Kitten dry food because the rice protein concentrate used for this one production run was obtained from Wilbur-Ellis, the same company that supplied this ingredient to Natural Balance.

Natural Balance Pet Foods halted the sale of some of its dry dog and cat food products including Venison & Brown Rice dry dog food and its Venison & Green Pea dry cat foods. Additional information is available at www.naturalbalanceinc.com.

The FDA is continuing to update its list of petfood recalls and has not yet accounted for all of the imported ingredients. The FDA began reviewing and sampling all rice protein concentrate imported from China, much as the agency has been doing for wheat gluten. The recalls now include products

India's first International Pet Fair was successful

India's first ever International Pet Fair recently concluded and was reported to be a success by its organizers. Organized by *Creature Companions* magazine, the fair was held February 9-10 at NSIC Exhibition Hall in Okhla, New Delhi, India. More than 6,000 people attended the event. Around 1,500 visitors were from outside of Delhi. The organizers are now gearing up for the next fair scheduled for January 18-20, 2008.

Petfood major added to University of Nebraska

The Board of Regents of the University of Nebraska at Lincoln recently approved a new academic major in food technology for pets that could be available next fall. The growing petfood industry and the demand for workers encouraged some at the university to add the major. University officials are also reportedly considering adding an animal science major related to pets, which the regents could vote on next year.

Alltech's symposium to focus on ethanol issues

The shift in corn use toward fuel ethanol has wide-ranging implications for the animal feed industry in terms of feed costs, availability and ration formulation. A special focus of this year's Alltech International Feed Industry Symposium is to look at how practices, products and programs will ultimately affect how we utilize feed energy, as well as protein ingredient resources. The symposium is scheduled for May 20-23, 2007, in Lexington, Kentucky,



USA. The companion animal segment will address challenges from mycotoxins to cancer, from longevity to appearance. Attendance is strictly by invitation only. For more information contact Alltech at +1.859.887.3328.



Kersey joins AFIA

Jarrod Kersey has joined the American Feed Industry Association (AFIA) as ingredient and state regulatory manager. Formerly, Kersey was a senior scientist with Procter & Gamble Pet Care. Kersey will replace regulatory consultant Betty Pendleton, who left AFIA after 15 years at the end of March. She will be concentrating on her regulatory counseling business.

APPMA forecasts pet spending to increase

New figures released by the American Pet Products Manufacturers Association (APPMA) forecast pet industry

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American Pet Products Manufacturers Association, Inc. spending to top US\$40 billion—with US\$16.1 billion being estimated for spending on petfood alone. Total pet spending in 2006 was US\$38.5 billion, quite an increase from the US\$21 billion Americans spent over a decade ago in 1996. Caring for one's pet's health is the most powerful trend across the industry, according to APPMA.

While there continues to be a fast pace of new product introductions and innovation, pet services are growing just as quickly. Other areas of note include continued growth of gift giving; continued consolidation of product manufacturers and retailers; and an increasing number of "human" product companies expanding their lines to include pet products.

Provimi announces sales for 2006

The Provimi Group has announced its annual turnover for 2006. Sales increased by 15% to 1.8 billion Euro

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Industry News

compared to 2005. Progress was particularly good in North America and the emerging markets. In France, despite a declining market, sales and volumes improved also due to a good contribution from strong exports growth to Asia and Latin America. In the rest of Europe, sales showed good growth and included the full year effect of the acquisitions made in 2005. The most significant contribution to sales growth came from the feed businesses in the Netherlands, Romania, Bulgaria and Russia, as well as from petfood.

Kmart launches petfood line

Kmart has launched a new line of private label pet products for dogs and cats called Champion Breed. The line of food, treats, toys and litter is intended to provide consumers with value

products with formulations that compare to leading national brands. The new line includes nine varieties of dry cat food including Senior, Kitten and Indoor; eight types of wet cat food; 14 varieties and sizes of dry dog food; six types of wet dog food; and 13 varieties of dog treats and biscuits. The dry products will be introduced at Kmart stores in the US, with the wet petfood to follow.

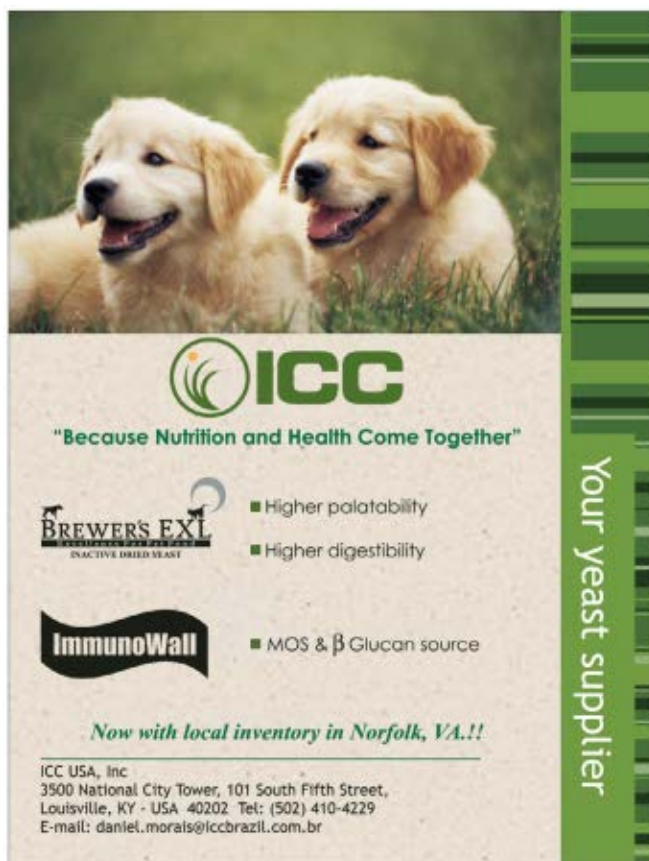
NRC forms review committee

The National Research Council (NRC) of the National Academy of Science has formed a new committee, Examining the Safety of Dietary Supplements for Horses, Dogs and Cats. The committee members are listed online at www8.nationalacademies.org/cp/CommitteeView.aspx?key=BANR-O-06-08-A.

The committee is to examine three novel materials in both feed and alone as supplements based on examination of data. The compounds selected for the review are primrose oil, lutein and garlic.

Ameri-Pac gains national recognition

DiversityBusiness.com recently named Ameri-Pac Inc. as one of the top 500 women-owned and minority-owned businesses in the United States. Ameri-Pac also ranked number 18 of top small businesses in Missouri and number 14 of the top women-owned businesses in Missouri. The Div500 is a classification that represents the top 500 diversity-owned businesses in the US, in sectors such as technology, manufacturing, food service and professional services.



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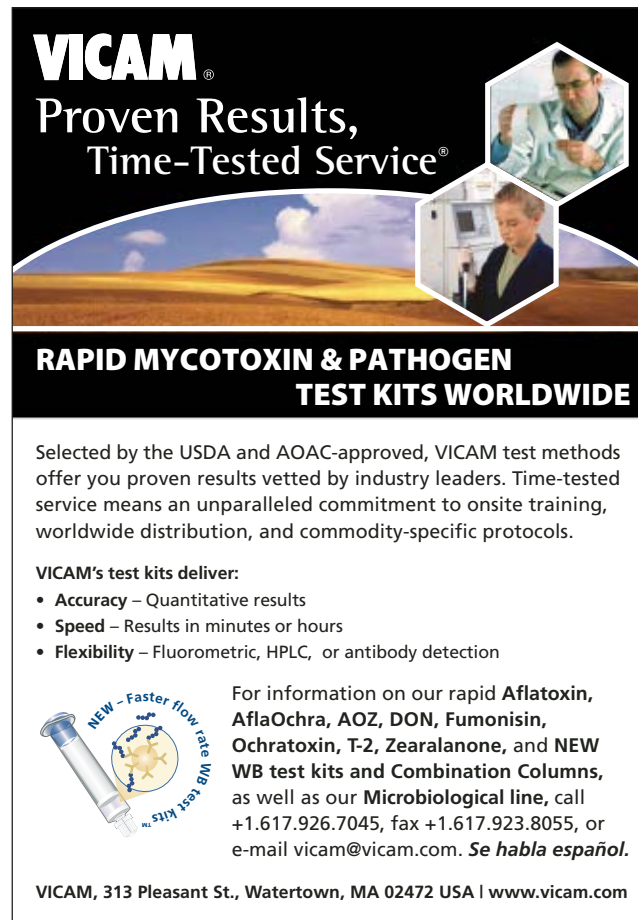
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In response to your article “Spare the Corn” (“Something to Chew On,” *Petfood Industry*, March 2007), you stated “it takes 1.29 gallons of gasoline to produce enough ethanol to replace 1 gallon of gasoline at the pump.” While this may be true, you use this irresponsibly to make your point. To be fair, you also need to point out how much gasoline it takes to produce 1 gallon of gasoline at the pump.

You should be looking at this as energy and how many BTUs each fuel contains, as well as how many BTUs it takes to produce, refine and deliver. According to Bruce Dale of MSU’s Biomass Conversion Lab, “You can’t add up the different forms of energy based on content, you must look at quality.” He points out that the net energy loss of ethanol from corn is negative 29%. The net energy loss from gasoline from petroleum is negative 45%. Thus, it takes 1.45 gallons of gasoline to produce 1 gallon of gasoline at the pump!

I agree that we need to move into other forms of raw materials to produce ethanol. This will only be a matter of time. Why would you use other materials when corn is so plentiful, cheap and easy to convert? What is happening is a market correction in the price of corn. Corn has been undervalued for 60-plus years—so much so that the government has to subsidize the farmer. This is all shifting to a price level that the farmer can sustain himself and probably the level it should naturally be.

I think you have to look at this as a short-term problem for a long-term benefit to the consumer. Ethanol will eventually keep more of our money in our local communities and not going to OPEC. I liken this to the Model T Ford. As the consumer grew comfortable with the automobile, the industry grew into the automobile of today. As the consumer grows more accustomed to ethanol, we will become more energy independent. It has to start somewhere, and corn to ethanol was the best

starting point—but not necessarily the finish line.

Aaron Norris, VP sales
BNW Industries

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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: jkvvamme@wattnet.net.



« Cheese Please whole food pet treats

Complete Natural Nutrition Inc. (CNN) has launched a line of whole food pet treats. Cheese Please treats are 100%-natural treats made from Wisconsin cheese, crumbled and baked. According to CNN, Cheese Please is the only dog treat in the industry that is protected by a manufacturing patent. Cheese Please will be available in one flavor—Cheesefest. www.cheesepleasetreats.com

Smart Bites promote health and wellness »

Smart Bites is a line of innovative dog treats from Mars Petcare US combining great taste with nutritional support for overall wellness and specific health needs. Smart Bites are packed with nutrition and scientifically formulated with the finest ingredients, according to the manufacturer. Smart Bites are available in Hip & Joint; Skin & Coat; Puppy Growth & Development; and Adult Health & Wellness varieties. www.smartbitestreats.com



« Nature's Promise for small animals

New Nature's Promise line of pelleted foods and hay products for small animal pets such as rabbits, guinea pigs and chinchillas are now available on pet retailers' shelves from ZuPreem. Hay products include Western Timothy Hay, Premium Alfalfa Hay and Premium Orchard Grass, and are packaged in several sizes that allow pet owners to view the product. The hay comes from one source in Idaho and ranks as the highest grade available, according to ZuPreem. www.zupreem.com



Sniffers LifeStages treats »

Chomp Inc. has introduced a new product line, Sniffers LifeStages. The product is the first all natural, semi-moist treat on the market developed specifically for the Puppy, Adult and Senior lifestages of a dog, says Chomp. Sniffers LifeStages Puppy treats include calcium, phosphorous and omega-3s for healthy development of growing puppies. LifeStages Adult treats include antioxidants, kelp and flax seed oil for healthy, active adult dogs. LifeStages Senior treats are low in fat and include antioxidants, fiber and omega-3s. The Sniffers LifeStages treats will be available May 2007 at retailers. www.chompinc.com



Tapco Inc.



Tapco Super EuroBucket, new CC-XD (Xtreme Duty) and CC-HD (Heavy Duty) Elevator Buckets are available in Polyurethane, Nylon and Polyethylene.

Company History: Tapco Inc. was conceived in the early 1970s by Paul D. Taylor, president and Ted W. Beaty, executive vice president, to fill a void in the elevator bucket industry. At that time, there were only a small number of nonmetallic buckets manufactured in the world. All the other buckets were made from fabricated or pressed steel. With the inherent problems of steel buckets and the limited range of the existing polyethylene styles, the time was right for Tapco.



Ted Beaty and Paul Taylor, Founders

The name Tapco is derived from **Ted And Paul's Company**. Our company has been in its own 90,000 square feet (8,300 square meter) facility for more than 20 years. This has allowed us to bring our injection molding in-house for better control and cost effectiveness.

Tapco has eight injection molding machines ranging from a small 150-ton press to a large 1,000-ton press. This allows us to make our entire range of buckets in the most expedient manner and with the greatest quality control.

Product Line: Tapco stocks the largest inventory of elevator buckets and bolts in North America – some 900,000 buckets and 12 million bolts. We also have the largest inventory of abrasion-resistant sheeting, drag

flights and hanger bearings. We have the products that you want, when you need them, and at a competitive price! Our staff is geared to handle the most urgent of emergencies.

Along with high density polyethylene and nylon elevator buckets, Tapco specializes in the production of injection molded polyurethane buckets. Injection molded buckets give the utmost in long life. The extremely high pressures required to make injection molded buckets guarantee very dense, long wearing surfaces. The polyurethane selected by Tapco is specifically designed for use in the feed industry. Stocking distributors are located strategically in North America, Central America, South America, Australia, Western Europe and the Pacific Rim.

Marketing Strategy: Tapco is continuously researching new technologies to better serve our customers. Product research has been a priority for many years. Innovations



Tapco buckets are made from the highest quality resins – engineered for specific uses and applications.

in the company's state-of-the-art processing technology enable Tapco to meet the customized needs of its diverse customers. Tapco uses the highest quality material for buckets – 100% prime virgin polyethylene, impact modified nylon and thermoplastic polyurethane.

Corporate mission:

Tapco's mission is to provide the highest quality products and services at the best price. The company's focus is on building and maintaining "solid and reputable" relationships with its customers. With our experienced staff, we are able to serve your needs promptly. Most importantly, we appreciate and are proud of you, our customers. We look forward to serving you for many more years, and welcome any suggestions on how we can serve you better in the future.

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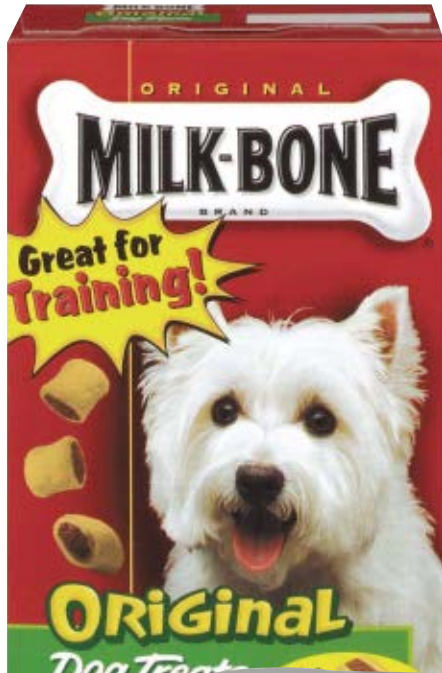


Fanged and Pointed Fanged Elevator Bolts are available in 38 sizes and three materials.

Great brands,

Del Monte focuses on powerful trends

BY JENNY KVAMME, DVM



The integration of both Meow Mix and Milk-Bone has gone very smoothly for Del Monte Pet Products.

Del Monte Foods is one of the largest and most well-known producers, distributors and marketers of premium branded and private label food and pet products for the US retail market. The San Francisco, California, USA-based company generated US\$3 billion in net sales in fiscal 2006, with 40% of its sales coming from a powerful portfolio of 14 pet product brands including Meow Mix, Kibbles 'n Bits, 9Lives, Milk-Bone, Pup-Peroni, Gravy Train, Nature's Recipe, Sausages, Pounce and Meaty Bone.

Paying attention

Del Monte is, as a company, focused on two very powerful business trends. The first is "Health and Wellness" on the human side. The second is "Pet as Family Member." Del Monte believes it is uniquely positioned, given its portfolio and the core competencies of the total company, to capitalize on those two powerful trends.

Blending in

Recently, I spoke with Jeff Watters, senior vice president of Del Monte Pet Products. He provided his perspective on how the company has been doing since its most recent acquisitions. According to Watters, the integration of both Meow Mix and Milk-Bone has gone very smoothly. There has been a positive and immediate response to the company's changes in programming and increases in investment in the brands.

Del Monte's total market share of the cat food category is growing nicely with the addition of Meow Mix. "We've capitalized on the momentum that Meow Mix had coming into the acquisition and we've actually built off of that. We have also taken the work that the Kraft team did on Milk-Bone and we believe elevated Milk-Bone to an even better place over the last six months or so," he says.

Watters explains that Milk-Bone was a non-core business for Kraft. "I think even the Kraft folks at the time

Business basics

Headquarters: San Francisco, California, USA

Officer(s): Richard G. Wolford, chairman of the board, president and CEO; Jeff Watters, senior vice president, Del Monte Pet Products

Annual sales: US\$3 billion in fiscal 2006

Brands: Meow Mix, Kibbles 'n Bits, 9Lives, Milk-Bone, Pup-Peroni, Pounce, Wagwells, Gravy Train, Jerky Treats, Canine Carry Outs, Sausages, Nature's

Recipe, Alley Cat, Meaty Bone

Facilities: 17 production facilities and 18 distribution centers in North America; petfood research facilities in Walnut Creek and Terminal Island, California, USA. Operating facilities and distribution centers in American Samoa, Ecuador and Venezuela

Employees: 1,760

Company website(s): www.delmonte.com; various brand websites

great future

would have admitted that it didn't get its fair share of attention. It certainly gets its fair share of attention within the Del Monte pet portfolio, so those businesses have both responded quite nicely to the attention, focus and investment that they've received over the past six to eight months," he says.

Watters notes that the Milk-Bone and Meow Mix businesses have allowed Del Monte to improve its innovation platform. "I think they have really enhanced our relevance to both our consumers and our retail customers. We expect very big things for both of these businesses over the next 12-18 months."

New products, innovation

In the past year, Del Monte has launched its share of new products. Kibble n' Bits Brushing Bites, the first mass marketed oral care dry dog food, is the most successful new item launch into the dry dog segment in the last couple of years, according to Watters.

Del Monte has also had strong launches with Pup-Peroni Ribs, as well as its 9Lives Daily Essentials. "We feel as though across the board we have had a very strong legacy of innovation," Watters comments. Innovation is key to Del Monte's future success in the pet product arena as, historically, its core market has been the mass market consumer.

"We do a lot of work to mine insights associated with certain consumer segments in the mass market, particularly what we call the 'Dogs and Cats are People Too' consumer segments. These are people that very much epitomize the 'pet as family member' or the 'humanization of pet' trend. That target tends to be more of a mass market consumer than a specialty or niche consumer," he notes.

Del Monte sees opportunity to not



Jeff Watters, senior vice president of Del Monte Pet Products, and Nova.

Historical perspective

The exact origin of the "Del Monte" name is unknown. Apparently, the name was used in the 1880s by a food distributor to designate a coffee blend prepared for the Hotel Del Monte in California. In 1892, the firm selected Del Monte as the brand name for its new line of canned peaches. In 1917, Del Monte became the first US fruit and vegetable processor to advertise nationally.

In 1979, the company was acquired by RJ Reynolds Industries (later RJR Nabisco). In the late 1980s, RJR Nabisco sold off the fresh fruit portion of Del Monte. The remaining core domestic company—today's Del Monte Foods, which owns the Del Monte name and trademark—was sold to a Merrill Lynch investor group in 1989, and subsequently acquired in 1997 by the Texas Pacific Group (TPG). TPG took the company public again in 1999.

Late in 2002, Del Monte acquired the US StarKist seafood, North American petfood and pet snacks, US infant feeding, College Inn broth

and US private label soup businesses from the HJ Heinz Company. Merging these businesses into the company more than doubled Del Monte's size. With these businesses came top selling brands such as Kibbles 'n Bits, 9Lives, Pounce and Pup-Peroni, which enhanced the company's presence on grocery store shelves.

In March 2006, Del Monte announced its agreement to acquire the Meow Mix Co., maker of Meow Mix brand cat food and Alley Cat brand dry cat food for US\$705 million. Later that year, Del Monte announced that it had completed its acquisition of certain pet product assets, including the Milk-Bone brand, for approximately US\$580 million from Kraft Foods Inc.

Rick Wolford, Del Monte's chairman and CEO, noted at the time that "this transaction, coupled with our acquisition of Meow Mix, creates an improved platform for developing innovative and successful products, significantly improving Del Monte's competitive position in the petfood category."

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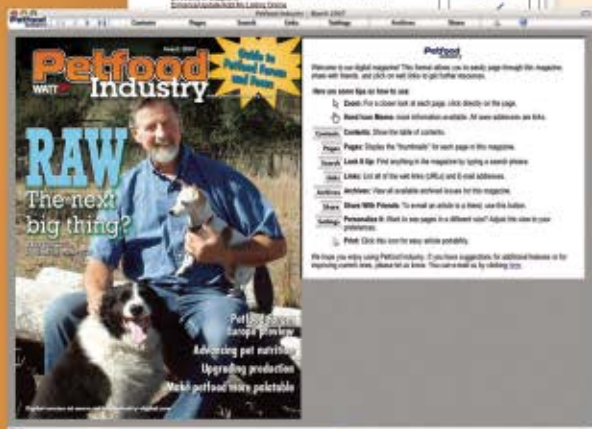
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Kibbles 'n Bits Brushing Bites has been a very successful new product launch for Del Monte.

only develop that core market, but also to extend its current platform into niche segments, such as the specialty user or the premium/superpremium target over the next several years.

Growth keys

According to Watters, growth starts with understanding the company's consumer target and ensuring that it is developing new products and/or solutions that meet the needs of pet families.

Another key to retail success is to develop point of purchase "excellence," to ensure that the consumer shopping experience is a successful one.

Watters believes that Del Monte leads the competition in areas of innovation and thought leadership. "We recognize that we are probably not the deepest-pocketed competitor in the pet category. We have some very

well-established, entrenched and rich competitive sets, and as a result we have to work smarter."

He notes that while product innovation is central to its success, Del Monte needs to think more broadly to further solidify its position as an industry leader. "Thought leadership, as we see it, is both the way we carry our message to our consumer and the way in which we carry our message to our retail partners," Watters says. Del Monte has been successful in its approach to category management and the tenants of merchandizing, assortment pricing and shelving optimization with what it calls the "Star Set." This helps retailers build their shelving schematic around "consumer need states," according to Watters.

What's in store?

"We're going to place our bets on our ability to think more clearly about consumer and customer needs, and we hope that our platform of innovation and thought leadership will ultimately be differentiating for Del Monte Pet Products and presumably lead us to greater market success than we enjoy today." Overall, Watters is optimistic about the future of the entire company. "We have dramatically transformed the total portfolio for Del Monte over the past 12-18 months," he notes. ●

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Petfood 2011: the global outlook

New research pinpoints top worldwide industry trends for the next five years

BY DAVID LUMMIS

Imagine being able to take the pulse of hundreds of petfood industry experts from around the globe, honing in on every major market and region with all its diversity, complexity and interconnections. Through an online questionnaire distributed by *Petfood Industry* during December 2006 and January 2007, Packaged Facts/*Petfood Industry*'s Global Survey did just that, compiling the responses of nearly 500 readers of the magazine—including manufacturers, suppliers, service/consulting firms, marketers, veterinarians and nutritionists—to gauge future trends in the global petfood industry as well as the current state of industry development in individual national markets. Highlights include:

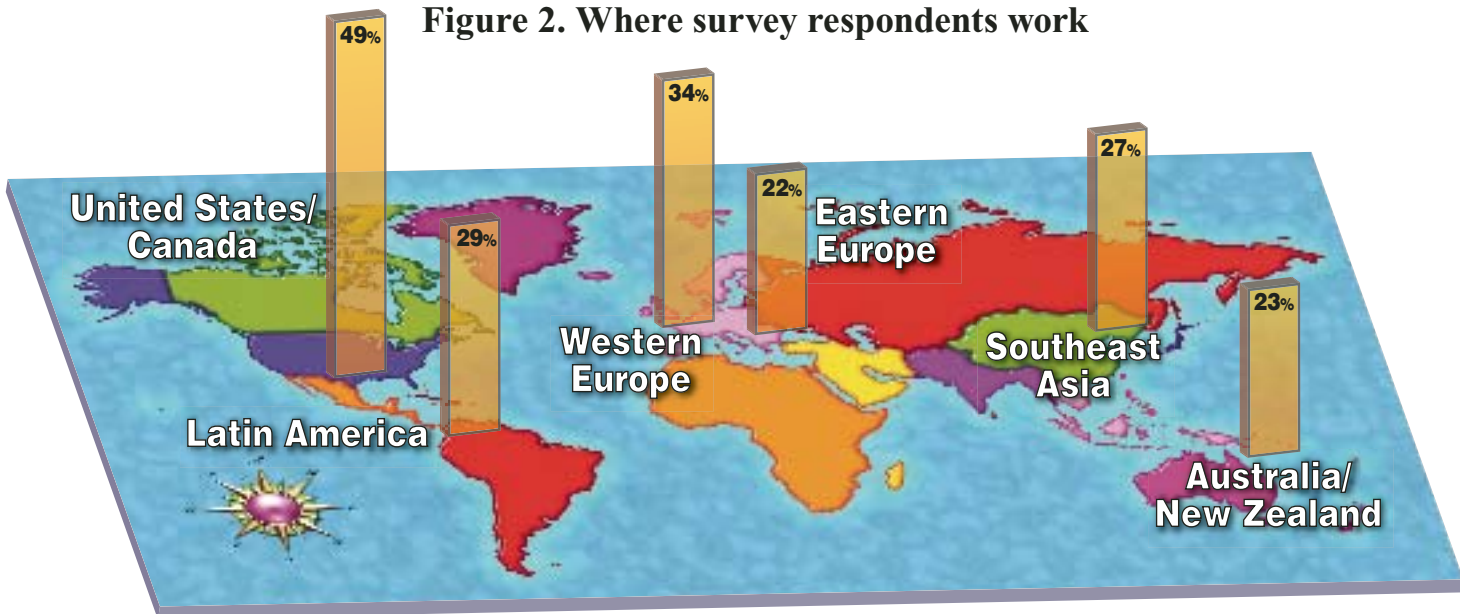
- ▶ A total of 59 countries are represented in the survey, and a majority of respondents' companies do business in multiple regions, with the largest percentage citing involvement in the United States/Canada (74%), followed by Western Europe (61%),

Figure 1. Local petfood market characteristics, 2007

Mature markets <i>(e.g., US, UK, Japan, Australia)</i>	Mid-level markets <i>(e.g., Mexico, Portugal, Poland, Thailand)</i>	Emerging markets <i>(e.g., Russia, India, China)</i>
Ownership of pet dogs and cats is very popular; multiple-pet households are common.	Ownership of pet dogs and cats is increasingly popular.	Ownership of pet dogs and cats is not well established as a whole or across socio-economic classes.
Dogs and cats are often pampered ("humanized") with premium petfoods and treats and pet furniture, toys, clothing and gifts.	Dogs and cats are pampered to a degree with petfoods, treats and accessories.	Only a limited range of dog and cat accessories are available.
Dog and cat owners typically provide good preventive and emergency veterinary care, including expensive treatments (surgeries, prescription drugs) for various conditions.	Dog and cat owners typically make basic expenditures on pet veterinary care.	Routine expenditures on pet veterinary care are not common.
Mass market dog and cat food brands are fully established with various options by formulation type (dry, wet, semi-moist), package size, pet lifestage (puppy/kitten, adult, senior, diet) and specialty ingredients. Value-priced and premium private label brands, plus superpremium specialty brands, offer strong competition.	Mass market dog and cat food brands are established and offer increasing options by formulation type (dry, wet), package size and pet lifestage (puppy/kitten, adult, senior).	Processed dog and cat food is not the norm, and processed product options are limited by brand, formulation and package size.
Market growth will primarily come from converting more customers to higher-priced and value-added products, including premium, functional and convenience products.	Market growth will come from converting customers to higher-priced petfoods, increased pet ownership and an increase in multiple-pet households.	Market growth will primarily come from increasing pet ownership and from converting dog and cat owners to use of processed petfood products.

Based on survey respondents' characterizations of pet ownership rates, degree of pet pampering/humanization, level of health/veterinary care and prevalence of mass market and premium petfood brands in their countries of residence.

Figure 2. Where survey respondents work



The regions of the world where survey respondents work. Percentages total more than 100% because the professional role of most survey respondents involves multiple regions.

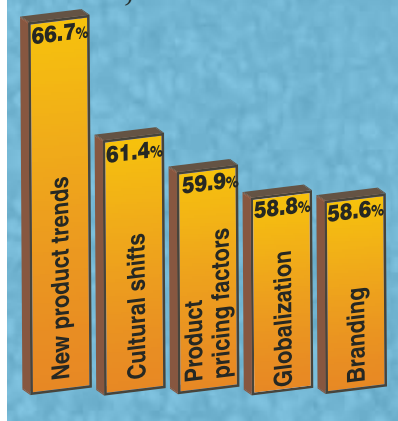
Southeast Asia (61%) and Latin America (57%). In addition, significant proportions are associated with petfood markets in Australia/New Zealand (48%), Eastern Europe (47%), North Africa/Middle East (39%), India/Pakistan (33%) and South/Central Africa (30%).

- Most respondents work in general management (29%), marketing/sales (28%) or research (14%). In terms of their locations, half of respondents work with the US/Canadian markets and a third with Western Europe, while one-fifth to one-quarter work with markets in each of the other regions (see Figure 2). In keeping with this multiregional emphasis, the regional data reflect broad market perspectives rather than local market performance.
- The dozens of global market trends covered in the survey are grouped under 12 broad factor headings—new product trends, cultural shifts, product pricing, branding, globalization, packaging trends, marketing and trade, demographic trends, retail and supply shifts, marketer shifts, Internet use and organic petfood.

The survey results, detailed in Packaged Facts' May 2007 *Global Pet Food*

Industry Outlook report, further classify national markets into three levels of development—mature, mid-level and emerging—based on respondents' characterizations of pet ownership rates, degree of pet pampering/humanization, level of health/veterinary care and prevalence of mass market and premium petfood brands in their countries of residence (see Figure 1).

Figure 3. Top five global industry factors, 2007-2011



Of survey respondents, 66.7% cited new product trends as very important to the development of the global petfood industry during the next five years; and so on.

To put the survey data in context, the report also draws on primary interviews with industry executives and professionals; syndicated pet market reports published by Packaged Facts; government, trade and consumer research sources; and Datamonitor's Productscan Online service tracking new product introductions worldwide.

Top global factor: new product trends

Of the 12 broad factors covered in the survey, new product trends is number one overall, with two-thirds (66.7%) of respondents considering it very important to the development of the global petfood industry during the next five years (see Figure 3). The most important components of this factor are:

- Functional/condition-specific/novel ingredient foods (lifestage, weight loss, breed-specific, therapeutic);
- High-growth segments such as treats;
- Hyperpremium products; and
- Human-grade ingredients.

New product trends places high on the list of all respondents, regardless of company type or professional role. More than three-quarters (75.8%) of petfood manufacturers cite this factor

as very important, making it the top-ranked among this group. For retailers, the factor tops out at 85%. Among all respondent roles, new product trends ranks first except for veterinarians and respondents holding university/researcher/scientist positions.

Considering the nine regions in the survey, new product trends heads the list for five and holds second place for all but one of the others—South/Central Africa, where it is third. Tellingly, this factor rates even higher in the less developed markets of South Asia (77.4%) and North Africa/Middle East (74.2%) than it does in the developed markets of North America (71.6%) and Western Europe (69.7%), signaling the strong interest in commercially prepared petfood in emerging markets.

Cultural shifts is the other global factor cited as very important by more than 60% of respondents. The most important facets of this factor are the human/pet relationship and ability of consumers to afford pet care. Of the remaining 10 factors, seven are judged to be very important by 54%-60% of respondents, while three fall below this level. Organic petfood comes in last at 31%, reflecting both the low penetration of organic products in mature markets as well as the much lower level of interest in mid-level and emerging markets.

Human/pet relationship heads trend list

While new product trends scores highest among the 12 broad factors, three individual elements (specific aspects comprising the broad factors) rate even higher. The human/pet relationship, an aspect of the cultural shifts factor, rates as very important among almost four-fifths (78%) of survey respondents.

Convenience, under the packaging trends factor, and special ingredient foods (i.e., functional/condition-specific/novel ingredient foods), under new product trends, each garner “very important” votes from 68%. The three elements placing lowest in the survey, each ranked very important by less

than 25% of overall respondents, are homogenization of product preferences (under globalization), postponing marriage (under demographic) and global production (under organic petfood).

South Asia: high priority on marketer shifts

Looking across all four respondent classifications—company type, professional role, level of country development and region—an even 78% of marketers cite branding as being very important to the petfood industry during the next five years, making this the highest-ranking trend by this measure. More than three-quarters of two other classifications—respondents from South Asia and manufacturers—say new product trends is very important, at 77% and 76%, respectively.

By index, the highest ranking factor is marketer shifts, as rated by respondents who work in or with regions including South Asia. These survey participants are 36% more likely than all respondents on average (index of 136) to view this factor as very important. As in other emerging markets, the petfood fortunes of South Asia (i.e., India and Pakistan) depend on the advances of Western influences into the market, via manufacturers like Mars division Effem India Pvt. Ltd. (Pedigree) and international retailers like Wal-Mart and Carrefour.

New products expanding to less developed markets

Last year saw the biggest global surge of new petfood products ever, with a growing share of the activity coming from mid-level and emerging markets in Eastern Europe and Latin America (see Figure 7, p. 25). During 2006, 655 new dog and cat food products appeared globally, up from 280 in 2002, according to Datamonitor’s Productscan Online service.

In the US—which accounted for approximately half of 2006 introductions in mature country markets—marketers launched 254 new dog and cat food product lines encompassing 1,181 SKUs (including different flavors,

Three markets, mature to emerging

Australia ranks among the top 10 most developed markets for petfood in the world along with the UK and other Western European nations, Canada, the US and Japan. Accordingly, market growth in Australia, where pet ownership is already very high, is coming primarily from the conversion of existing customers to higher-priced fare targeted to specific health concerns and pet pampering.

At the same time, locally based manufacturers continue to target multiple export markets, with the highest degree of overlap coming from Southeast Asia, North America and Western Europe. Half of respondents also cite involvement in South Asia, North Africa/Middle East and South/Central Africa, with at least one-third reporting involvement in Eastern Europe and Latin America.

Respondents based in Australia unanimously say high-growth segments such as treats are very important to the development of the global petfood industry during the next five years, with packaging convenience and the human/pet relationship also scoring high (see Figure 4). Reflecting the situation in most developed countries, a sizable majority of Aussie petfood manufacturers consider consumer advertising and promotion very important, along with an urbanization-driven emphasis

Figure 5. Top Mexican petfood trends, 2007

- Premium/value-added vs. economy/mid pricing;
- High-growth segments such as treats;
- Functional/condition-specific/novel ingredient foods;
- Educational and informational programs about pet care;
- Support of manufacturer brands with consumer advertising/promotion; and
- Trade advertising and promotion.

on smaller pets, production costs and Internet usage. Such trends will continue to shape these companies' market development strategies. Looking ahead, expect to see growth in locally made import replacement products in response to stricter import requirements and Australian purchasing preferences.

Info driving Mexican sales

Classified in the survey as mid-level, Mexico is one of the most dynamic Latin American markets for petfood along with Brazil, Argentina and Chile. Compared with other respondents, those based in Mexico are more regionally based, with the highest degree of marketing overlap coming from the US. Yet every region of the world is represented by this group of industry experts, the majority of whom identify themselves as manufacturers.

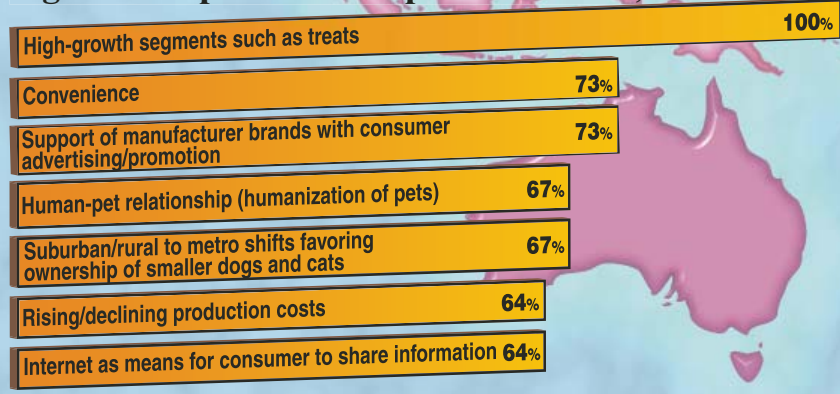
As with most other Latin American countries, Mexico is a price-sensitive market whose fortunes fall and rise along with the economy. Thus, 88% of respondents cite premium/value-added vs. economy/mid pricing as a very important trend in the development of the global industry through 2011 (see Figure 5). Nevertheless, Mexico holds solid market potential at all price levels. Premium product trends including high-growth segments such as treats and functional/condition-specific/novel ingredient foods are tied in the survey with the premium vs. economy trend, suggesting petfood preferences among upper-income consumers are crossing over into the middle- and lower-income brackets.

The survey results also confirm that educating Mexican consumers about proper pet care will remain key to growing the market, with an even three-quarters of respondents considering support of manufacturer brands with consumer advertising/promotion, trade advertising and promotion and educational and informational programs as being very important to future industry development. The government is expected to take a growing role in this effort, but promotional messages accompanying heavily advertised new products will have the most impact.

India: set to zoom

A surging middle class, ongoing free-market reform, double-digit

Figure 4. Top Australian petfood trends, 2007



One hundred percent of survey respondents based in Australia cited high-growth segments such as treats as very important to the development of the global petfood industry during the next five years; and so on.

increases in dog ownership and mass media educational campaigns about the benefits of commercially prepared petfoods virtually guarantee strong performance in this emerging market for the foreseeable future. Locally based operators forecast a growth rate of 25%-35% per annum for at least the next two years, with the most growth occurring at the economy end of the product pricing spectrum as more mid-level consumers convert from homemade to prepared petfoods.

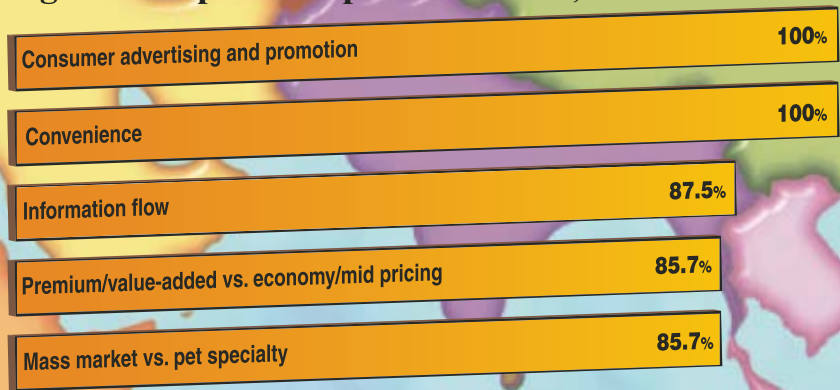
Given these trends, it is not surprising that India-based survey respondents unanimously say consumer advertising and promotion are very important to the development of the global industry during the next five years, with 88% also identifying information flow (see Figure 6). The other factor to get a unanimous very important ranking—one that also scores high in mature and mid-level markets—is convenience, reflecting the growth of dual-worker households and the time-sav-

ing benefits of prepared petfoods.

The number four trend among India-based survey respondents—premium/value-added vs. economy/mid-priced—reflects both the focus on value brands for the middle class and the growth of the tiny but rapidly emerging superpremium segment among affluent, urban households. This also shows in the mass market vs. pet specialty tension reflected in trend number five.

Looking ahead, the biggest boon to petfood in this market may involve the projected push of Wal-Mart into India beginning in 2007, via a joint venture with Bharti Enterprises. The other key factor in India's rapid growth is the strong role of veterinarians in educating consumers and selling petfood, with vets currently accounting for 44% of sales of commercially prepared foods. Half of the India-based respondents identify themselves as veterinarians—the highest veterinarian skew of any individual country in the survey.

Figure 6. Top Indian petfood trends, 2007



Of survey respondents based in India, 100% cited consumer advertising and promotion as very important to the development of the global petfood industry during the next five years; and so on.

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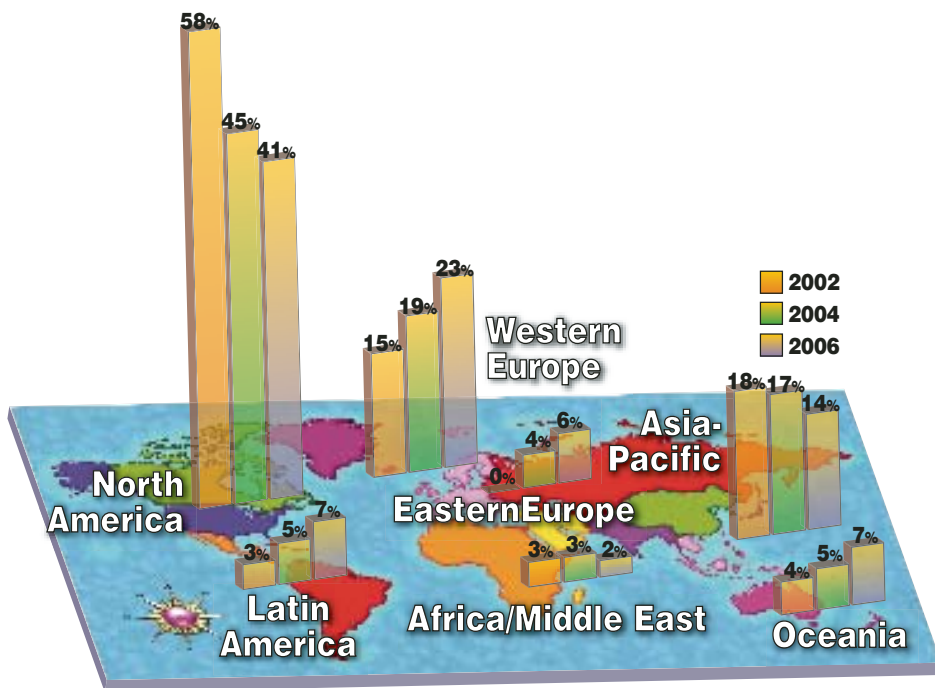


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Figure 7. Global petfood product introductions by region, 2002-2006



Percentage by region of petfood product introductions for 2002, 2004 and 2006. North America's share has declined as other regions' have increased. Source: Packaged Facts/Petfood Industry's Global Outlook, January 2007; estimates based on data from Datamonitor's Productscan Online service.

sizes and package variations), up from 155 lines and 587 SKUs in 2002.

Premium petfoods cover all bases—natural/organic, fresh/real, fortified/functional, breed/size specific—and are increasingly being positioned not just as human style but also human grade in terms of ingredients and manufacturing processes. This trend seems likely to gain further steam given the recent petfood recalls in the US and Canada.

Trends trickling over

Despite the vast differences in the three levels of market development, the global petfood market may be smaller than one might expect in terms of the trends expected to drive growth through 2011. The human/pet relationship trend topping the list in mature markets also ranks high in mid-level and emerging markets, with at least 70% of respondents for each level of development citing it as very important.

In mature markets like the UK

and Australia, the humanization trend will continue to involve products that more closely resemble those for people, while the most important aspect of the human/pet relationship in emerging markets like China and Russia will be increased levels of pet ownership and commercial foods penetration. In mid-level markets, this trend will track between those two scenarios.

As major marketers continue to expand their international presence, expect to see a rapid acceleration in global overlap of trends like functional foods, urban-centric marketing and Internet marketing as mature market trends trickle over into less developed markets.

David Lummis is the senior pet market analyst for Packaged Facts. Contact him at Tel: 240-747-3000; E-mail: editor@packagedfacts.com; Website: www.packagedfacts.com.



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Learning from a sad and messy crisis

Vast and confusing recalls beget misinformation and threats to petfood brands

BY TIM PHILLIPS, DVM

I know how I would feel if my dog died from eating contaminated petfood. I'd be sad, angry and looking for ways to prevent such a thing from happening again. That is how a lot of pet owners are now. Beyond that it's a media and litigation circus.

Fast-breaking news, some inaccurate, from thousands of sources has a huge downside: Brand equity that has taken years to establish can be wiped out in a few days. There are a number of quality assurance systems you can put in place to prevent such devastation. Many petfood companies will likely work at improving vendor certification programs. Still, what if it happens? How do you respond? When something goes terribly wrong, you best be prepared.

Exhibit A: Menu Foods

On March 16, 2007, Menu Foods announced a precautionary dog and cat food recall. (The Menu recall list is available at www.menufoods.com.) On March 23, the New York State Depart-



Recent petfood recalls left gaps on retailers' shelves.

ment of Agriculture said it had found the toxin aminopterin in Menu petfoods. But, other scientists were unable to validate the findings.

On March 30, the US Food and Drug Administration (FDA) revealed that a compound called melamine may have caused the pet illnesses and deaths. However, from what experts

know about melamine and its effects after being ingested, pets shouldn't have died as a result. While melamine, used as a fertilizer in Asia, should certainly not be in petfoods, it's not known to be lethal. Why, then, have pets died after eating contaminated food? At press time we do not know. Says Dr. Richard Goldstein, an internal medicine specialist and assistant professor at Cornell University College of Veterinary Medicine in Ithaca, New York, USA, "We're missing a piece of the puzzle."

Melamine was found in the wheat gluten from a new Menu supplier in the US, Las Vegas-based ChemNutra Inc., who sourced the wheat gluten in China. This is the same ingredient that Menu Foods made reference to in its recall press release of March 16. Melamine has not been found in the wheat gluten that Menu obtains from other suppliers. The FDA is blocking imports of wheat gluten from a company in China: Xu-zhou Anying Biologic Technology Development Co. in Wangdian.



The media has kept a close track on what has been happening in our industry.

On April 19, the FDA confirmed melamine has been found in wheat gluten, rice protein concentrate and, in South Africa, corn gluten, all imported from China. It now appears likely the melamine was added intentionally to boost the products' protein assays, giving the illusion of a higher protein content.

In fairness to Menu Foods, note that the FDA acknowledged that the adulteration with melamine could not have been identified by detection methods used by the industry and that no violations by Menu Foods have been found.

With all of Menu's quality assurance systems, how did this happen? It is because one supplier's product was adulterated with a material that is not part of any known screening procedure for wheat gluten.

More companies have since recalled specific products, including Nestlé Purina, Del Monte, Hill's, Sunshine Mills, Natural Balance and Royal Canin. Now scientists have found melamine in wet and dry products

What's next?

What's next remains to be seen. At press time, it is clear that this disaster is not over. Ed Mareth of 3D Corporate Solutions asserts there are monumental changes coming to the way the food chain is regulated—especially the animal food industry (Petfood Forum 2005 Proceedings). He predicts that it is only a matter of time before the media takes an interest in

what is entering the grocery store, home and cupboard via the petfood industry. He says, "The best ingredients today are 'human quality.' You may not like it, but the only way to guarantee safe, consistent and quality ingredients is to buy 'human-quality' raw materials."

Enter the lawyers

Distraught pet owners have filed class-action lawsuits against Menu Foods, as well as against Petco and a manufacturer who used Menu to make its products.

The petfood recall highlights two risks faced by firms using contract manufacturers, concludes *The Economist*. One is a damaged reputation. Many pet owners have expressed sur-

With all of Menu's quality assurance systems, how did this happen?

Classic success model: J&J

The classic success model for managing a catastrophic contamination event is how Johnson and Johnson (J&J) handled the cyanide tampering of Tylenol in 1982 and again in 1986. Notes food contamination expert Dr. Marcus Cooke, J&J succeeded in saving its brand by:

- ▶ Finding out the exact nature and magnitude of the situation.
- ▶ Acting immediately to address disposition of affected product.
- ▶ Taking action to prevent future

occurrences.

At each step J&J had public relations professionals sending clear and honest messages to affected parties and the general public. The company acted quickly and supported their customers first. By their actions, J&J was seen as another victim by the public. Throughout the critical period, J&J put public health above all other considerations. It converted a brand equity threat into and isolated event that did not shake public confidence in its products.

prise that premium brands were being made with common ingredients and at the same facility as a host of cheaper, own-label brands. Why pay more for branded goods, they ask? The criticism is somewhat unfair—differences between products lie largely in the vary-

ing proportions of ingredients used—but the perception of reduced value will be hard to shake. The lessons learned from Johnson and Johnson's handling of the cyanide tampering of Tylenol in 1982 (see sidebar above) may help reduce the damage.

The second risk relates to extended supply chains. The wheat gluten at the center of the contamination investigation was imported from China. Things can go wrong at companies' own facilities, but the recall will likely prompt tougher provisions in agreements with contract manufacturers. Some companies will stop using contract manufacturers entirely. For example, Natura Pet Products of San Jose, California, USA, has pledged to either acquire or build a canning plant so that the company can exercise complete control over its product lines.

Traceability is a must

The Menu petfood recall has created a heightened awareness of petfood safety and traceability issues. Traceability is the ability to trace and follow a food, petfood, feed, food-producing animal or substance through all stages of production and distribution. From core genetics to the petfood bowl, tracing involves identifying and docu-



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menting all procedures and practices that impact the life of a given product and making this information available to the purchaser or any other supply chain participant. Relatively new FDA regulations, namely those stemming from the Bioterrorism Preparedness Act of 2002 (www.fda.gov/oc/bioterrorism/bioact.html), make traceability a must, contends traceability expert Julie L. Kirk.

In these recent FDA regulations, the primary role of traceability is to protect

public health and animal health by facilitating the rapid withdrawal of products from sale and minimize potential impacts of bioterrorism. The drive for traceability in food and petfood manufacturing has been accelerating outside the US and is quickly becoming a US requirement.

A firm handshake and a solemn pledge to deliver safe petfood is no longer enough. More and more, major customers such as Wal-Mart are saying, "No data, no sale." Petfood companies that lack data transparency and detail will find it increasingly difficult to compete in the global market. ●

We need a crisis fund now

"Let's set up an industry-wide crisis fund to help the pets and people affected by contaminated petfoods—no questions asked," said Brian Connolly, cofounder of Castor & Pollux Pet Works, on April 18 at Petfood Forum 2007. The audience of several hundred people gave him a strong round of applause. Other ideas from speakers at Petfood Forum 2007 included:

► Ladd Hardy, senior VP marketing at Nutro Products, noted that, "Since it is impossible to test for every possible contaminant, we do feeding trials on every batch of dry petfood we make. That batch is held until it passes the feeding trial." Due to the recalls, Nutro is starting the same procedure for its wet petfoods.

► Dr. Doug Powell, the scientific director of the International Food Safety Network, stated, "You better know your suppliers—and this goes way beyond HACCP. You need to have your people on the ground watching to see that suppliers are doing what they say they are doing."

► Matt Frederking, manager of regulatory compliance for Southern States Cooperative, observed, "Paper work is not enough to ensure petfood safety. Anybody can make paper look as good as they want paper to look."



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Automating petfood safety

How to respond rapidly to minimize the effects of product contamination

BY TIM PHILLIPS, DVM

Ensuring petfood safety has always been important, but now it is in the public spotlight. Given the recent rash of petfood recalls, many pet owners are considering safety before they purchase petfood. Following is a brief overview of automating process control to ensure petfood safety.

Key questions for managers

"If you can't see it or measure it, then it is very difficult to improve it," notes Ray Bachelor of Bachelor Controls Inc. (www.bachelorcontrols.com). He suggests operation managers ask themselves key questions, including:

- Can I prove that the products I'm shipping are safe?
- Can I efficiently track ingredients received through finished goods out?

- What HACCP alerts have occurred during a production shift?
- Is my plant performance consistent?

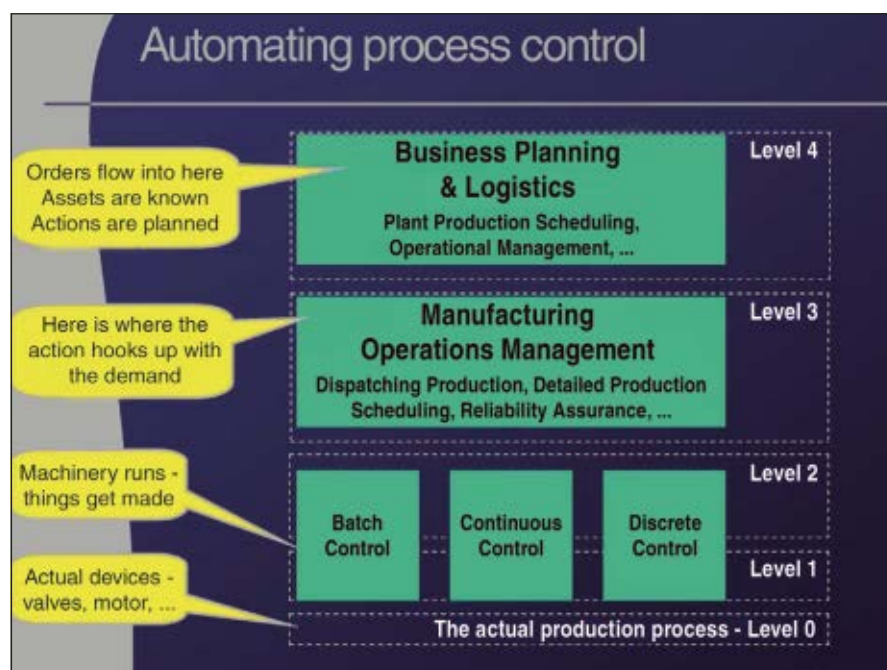
Rapid response

Traceability systems are recordkeeping procedures that show the path of a particular product or ingredient from supplier(s) through all the intermediate steps that process and combine ingredients into products supplied to customers and ultimately to consumers. Says Julie Lenzer Kirk of Interstates Companies (www.interstates.com), "In the event of a product recall, manufacturers must have the ability to determine what foods are potentially contaminated and to rapidly respond to minimize the health, economic and other effects of such contamination." The speed at which this can be accomplished and the amount of product impacted again depends on the traceability systems in place.

Traceability systems have been shown to be weak or absent during a number of recent human food safety incidents. They were proven to be slow or simply unable to assure consumers of food safety. There is a wide range of traceability systems in place today from paper-based to information technology (IT) enabled. "These systems are critically reliant on the accurate recording of information," says Kirk. As a result, handwritten or printed labels are being replaced or supplemented by more effective systems that use machine-readable identification (e.g., bar codes and radio frequency tags).

Make it a true priority

Petfood manufacturers cannot afford to ignore the traceability issue, even if they have been lucky enough



A well-designed plant network architecture integrates several systems into one automated system. Source: Leveraging production information, Ray Bachelor, Petfood Forum 2006 Proceedings.

Critical control points

Critical control points (CCPs) are used in manufacturing to eliminate and/or reduce the possibility of a petfood safety hazard. They can take many forms, and a thorough analysis of potential hazards is an important first step in the control of these hazards.

CCPs are defined as process steps that are controllable and where food safety hazards may be prevented, eliminated or reduced to an acceptable level. Loss of control of a CCP likely leads to the high food safety risk of an unacceptable health hazard. Conversely, loss of control of a non-critical control point indicates a low food safety risk.

Although these points might be controlled for quality reasons, they are not mandated as part of a hazard analysis CCP plan (HACCP). The bottom line: If there is a food safety hazard that is reasonably likely to occur, it must be analyzed and the point at which that hazard could be introduced must be monitored and controlled. The seven HACCP principals are:

- Conduct a hazard analysis.
- Identify CCPs.
- Establish critical limits for CCPs.
- Establish procedures to monitor CCPs.
- Establish corrective actions.
- Establish procedures for effective recordkeeping.
- Establish procedures to verify that the system is working properly.

HACCP is a scientific approach to controlling hazards in production. It involves the monitoring and control of potential biological, chemical and physical hazards. Intended to be a preventive system, HACCP applies to all processes,

to avoid a high-profile contamination incident. Regardless of the regulations, since trust is the foundation for acquiring and keeping customers, making food safety and traceability a well-documented priority is an important way to increase and keep a loyal customer base.

“If you can't see it or measure it, then it is very difficult to improve it.”

Adopting strict standards and ensuring that enterprise and supply chain systems support the full range of food safety and traceability requirements will protect companies from a potential disaster or additional cost incurred by non-compli-

ance with new regulations. Automating traceability is just one step in this process. It requires that quality control and lot traceability be integrated into processing and warehousing systems. These capabilities are an integral and intuitive part of operations and should be reflected as such in the systems that support operations.

Code power

Traceability is greatly enhanced through the use of bar codes for automated data collection. When supplier lot numbers are associated with a product bar code as that product is received and then scanned as it is introduced into the manufacturing process, the information can be easily traced when needed. Likewise, capturing the lot number of bulk products at receipt and usage, although prone to more uncertainty based on products mixing in a bin, helps quickly pinpoint what lots may have gone into which finished products. In the race against time in a recall or a regulator's request for information, automated systems beat a spreadsheet every time.

Send a positive message

“Traceability is not a threat,” notes Kirk, “but an opportunity—a challenge to send out a positive message.” Safety and traceability are integral parts of petfood quality, but they are also subject to a consumer's perception, just as quality is. ●

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Personal memories of Drs. Kronfeld, Morris and Corbin

I'm not a believer in the adage "bad things come in threes." However, that old saying appears true in this case. Three men, all highly influential in the field of pet nutrition, passed away over the course of only the last few months. I knew all of them personally, and each contributed in their own way to my professional development. I'll miss them greatly.

Each contributed in their own way to my professional development.

— David Dzanis



Dr. James E. Corbin



I didn't have the fortune to meet Dr. Corbin until the early 1990s, when I asked him to serve on the Association of American Feed Control Officials Canine Nutrition Expert Subcommittee (as well as subsequently, the Feline Nutrition Expert Subcommittee). At that time, I believe he had already "retired" from the University of Illinois after a long, distinguished career in both industry and academia. However, that never slowed him down. For many years after, he continued to be a notable presence at many industry meetings, including the Petfood Forum.

In my experience, Dr. Corbin always had a kind word for everyone. His propensity for compliments of others was matched by his enthusiasm for and interest in the field of pet nutrition. His face had a perpetual grin, and when asked, things were always terrific. Despite our age differences and personal familiarity, he insisted on addressing me by title, although at the same time in a most friendly manner (i.e., "Doctor Dave").

A summary of Dr. Corbin's life and career can be found at www.legalrecord.net/ag-pioneer-dies.html.

Dr. David S. Kronfeld



Dr. Kronfeld may not be as familiar as the other two within the petfood industry, but he was a virtual giant in the field of veterinary nutrition. He was one of only 18 Charter Diplomates in the American College of Veterinary Nutrition (ACVN) when it was formed in the late 1980s.

Much of Dr. Kronfeld's work in later years at Virginia Tech focused on equine nutrition, but his contributions to the field of canine nutrition, especially in regard to the feeding of sled dogs, cannot be underestimated. To borrow from an old country western song, he "was 'low carb' when 'low carb' wasn't cool."

His frequent participation in many discussions on both the ACVN and American Academy of Veterinary Nutrition E-mail listserves speaks to his knowledge on a vast array of nutrition topics.

One of my clearest memories of Dr. Kronfeld was a time when we were eating lunch together with a few other colleagues at a veterinary meeting. I was a mere graduate student and eager to learn. However, of all the potential topics we could have talked about, our discussion kept going back to whose menu choice was better, his or mine. While I didn't appreciate it at the time, he was really engaging me in the Socratic method of learning. This means of critical thinking through dialogue has proven helpful to me through the years, regardless of subject matter.

More information about Dr. Kronfeld's life and contributions to the field may be found at www.vetmed.vt.edu/publications/vitalsigns/feb07/index.asp#kron.

Dr. Mark L. Morris Jr.



Dr. Morris (along with his father, Dr. Mark Morris Sr.) may be best known for the introduction and development of Hill's Prescription Diets, one of the first lines of veterinary medical petfoods that remain popular to this day. As another ACVN Charter Diplomate, he was a frequent guest speaker at veterinary schools, which is where I first met him. His knowledge of

and passion for the subject was instrumental in my decision to pursue a career in veterinary nutrition.

Despite his preeminence in the field, I remember Dr. Morris as approachable, eager to help and humble. I recall only a few years ago when the National Research Council Committee on Dog and Cat Nutrition held one of its work sessions at a location where, coincidentally, Dr. Morris was being honored for his longtime contributions to veterinary medicine. Other committee members and I attended the function to add our accolades, but Dr. Morris turned the tables. Instead of just receiving his due praise, he shared the spotlight and asked us also to stand for recognition by the audience.

A tribute to Dr. Morris may be found at www.hillspet.com/zSkin_2/owner/whats_new_detail.jsp?FOLDER%3C%3Efolder_id=1408474395193871&CONTENT%3C%3Ecnt_id=10134198673433739&bmUID=1175708006679.

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Chicken first: marketing ploy or quality enhancement?

Chicken as the first ingredient on the ingredient panel of a dry extruded kibble has become more commonplace in the past several years. Why chicken? It is likely because of its popularity and ready supply rather than anything nutritionally unique or special about chicken. Beef, lamb, fish and other meats could be interchanged in this discussion just as easily.

The bigger issue is whether formulating a dry petfood to make a meat the first ingredient on the panel is only a marketing ploy or if it truly imparts some enhancement to nutrition and quality. The cynic will profess that it's all about marketing.

Of course, there is some real truth to the notion that the consumer is going to perceive that a food that is "made with real meat" or has "chicken as the first ingredient" is a higher quality product. And as our marketing brethren are eager to remind us—in the market ... perception is reality.

More than mere hype?

It might not seem intuitive, but to begin answering this question we need to determine exactly what constitutes chicken. The best place to look is the Association of American Feed Control Officials (AAFCO) manual wherein chicken, or rather poultry, is defined as "...the clean combination of flesh and skin with or without accompanying bone, derived from the parts of whole carcasses of poultry or a combination thereof, exclusive of feathers, heads, feet and entrails..."

Though one might deduce that chicken meal and chicken by-prod-



The bigger challenge is in the processing.

— Greg Aldrich

uct meal, since they are derived from chicken, would count toward "chicken" as the first ingredient, according to this definition and the labeling rules they don't. It's got to be the real un-rendered chicken.

However, that doesn't mean that it is the pieces and parts that you find in the grocery store. Purchasing chicken for petfood applications occurs primarily in the same supply chain as that of "hot dog or nugget meats."

This chicken is sometimes derived from hand trimming, but more frequently from mechanical separation operations in which the bones have been mechanically removed from the lean. This latter procedure also removes the soft material from the marrow of the bone, which can be high in fat.

The resulting chicken is then either chilled or frozen into blocks. Use in petfood requires that it be brought to a temperature just below freezing, but in a state that can be pumped, a condition that often requires the use of steam.

From the definition, one might think that chicken is all muscle and/or meat. The real ingredient, though, comes with a great deal of water, fat and some incidental bone.

There is also no regulation on the nutrient composition of this chicken,

so depending on the materials being deboned and the amount of steam it takes to pump the material, it can vary widely. It is often in the range of 65-70% moisture, with protein around 12-15%, however, and a minimum fat around 10% (though the level of fat can be higher).

Made with ...

Lest we think that adding meat is a new concept in dry petfoods, there were several regionally produced "meal" type dog foods that used shreds of meat in their formulas long before extrusion became popular.

More recently, several companies have marketed their foods as made "with" real meat (e.g., chicken) in their name—indicating that they contain at least 3% chicken. However, in these cases, the chicken is listed well down the ingredient panel and falls short of what it takes to be considered the leading ingredient.

So, how much chicken might it actually take to reach the top? In general, chicken must occupy around 15% of the formula to go ahead of the other ingredients. From a formulation standpoint this isn't too big an issue, though it does require that the other ingredients compensate accordingly; namely, that the

number (but not the content) of protein meals and grains are increased.

The bigger challenge is in the processing. The trick is to manage the elevated moisture and fat from fresh chicken in the conditioning cylinder or extruder so to achieve uniform mixing and cooking. It is only in the last 15-20 years that engineering of extruders and facilities, advances in computerized process controls and improvements in sanitation and meat handling equipment have been able to reach these levels.

One might assume that having this much chicken in the formula would contribute a substantial amount of protein to the diet. However, in most instances chicken adds less than 10% of the dietary protein.

Surprisingly, it may contribute more than 15% of the dietary fat. While this lower protein contribution might seem disappointing, the abundance of fat may help explain why high chicken formulas are more palatable for both dogs and cats.

The digestibility of diets containing fresh chicken has also been reported to increase slightly over diets that are principally rendered chicken (Murray et al., 1997). A plausible explanation for this is that the fresh chicken is processed or cooked only once through the extruder, while the protein meals (chicken [by-product] meal, fish meals, etc.) are cooked as part of the rendering process and then again during extrusion. This second round of cooking most assuredly leads to protein damage and a reduction in digestibility.

In this day of natural, raw and home-prepared petfoods, the notion of an extruded food with a high content of fresh chicken isn't a big stretch. In fact, it may actually be a bridge to the new petfood market.

It also gives credence to the notion that having chicken at levels sufficient to be the first ingredient in the formula is not merely hype because there are perceptible benefits to palatability and digestibility of the diet. These benefits may more than offset the increased challenges of procuring, handling and



One might think that chicken is all muscle and/or meat. The real ingredient, though, comes with a great deal of water, fat and some incidental bone.

processing a fresh chicken formula. While skeptics can scoff at having chicken as the first ingredient on the label, it does appear to be a true benefit for the pet and certainly makes for easier communication of this value to the pet owner. ●

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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Store brands rebrand

Sore brands have come a long way in their packaging and branding strategies. Remember those black and white “generic” packages with those bold black letters “Dog Food” or “Cat Food” and product that was perceived as low quality but good for the price? Store brands are now higher quality products with competitive pricing, more sophisticated category management practices and repositioned brands.

The packaging of store brands from the “black and whites” took a turn in the mid-1990s as they redesigned their packaging with bold colors often mimicking mega brands. This was tricky business as the value propositions of the store brands were often not consistent with these mega brands.

Back to basics

In the petfood aisle, retailers like Publix are reinventing the way store brands are branded. Publix Super Markets Inc. had 2006 sales of US\$21.7 billion and profits of over US\$1 billion. Operating in five states, it has implemented a comprehensive redesign of its packaging with innovative creative concepts that blend “old school” white backgrounds with contemporary, bold images and color coding.

This contrast of white backgrounds with traditional mega brand packaging like Pedigree and Iams has allowed Publix store brands to capture the eyes of the consumer once again by strategically placing their products in the middle of the pet food aisle for clear identification.

The image and equity of retailer brands can depend on the manufacturer brands they carry and the equity of those brands. Retailers use manufacturer brands to generate consumer interest, patronage and loyalty in a store.

The image of retailer brands can depend on the manufacturer brands they carry.

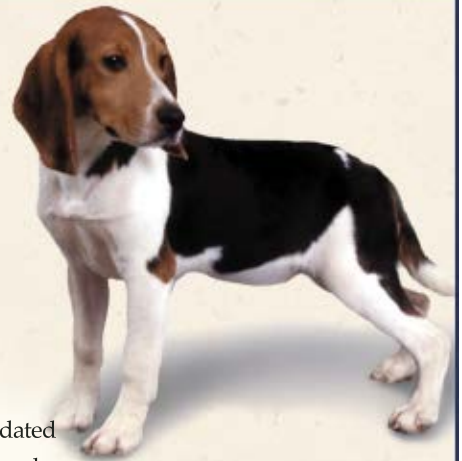
— Huntley Manhertz, Jr.



However, there is an emerging shift in the balance of power from manufacturers to retailers like Publix. Retailers will use their store brands to compete with manufacturers and other retailers like Wal-Mart. ●

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

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Research Notes

Dietary soy protein isolate effects in rats

Retinoic acid receptors (RAR) belong to the same nuclear receptor superfamily as thyroid hormone receptors (TR) that have been previously shown to be modulated by dietary soy protein isolate (SPI). This study examined the effect of dietary SPI and isoflavones (ISF) on hepatic RAR gene expression and DNA binding activity. In experiment 1, Sprague-Dawley rats were fed diets containing 20% casein or 20% alcohol-washed SPI in the absence or presence of increasing amounts of ISF (5–1250 mg/kg diet) for 70, 190 or 310 days.

In experiment 2, weanling Sprague-Dawley rats were fed diets containing 20% casein, with or without supplemental ISF (50 mg/kg diet) or increasing amounts of alcohol-washed SPI (5, 10, and 20%), for 90 days. Intake of soy proteins significantly elevated hepatic RAR β 2 protein content dose-dependently compared with a casein diet, whereas supplemental ISF had no consistent effect. Neither RAR β protein in the other tissues measured nor the other RAR (RAR α and RAR γ) in the liver were affected by dietary SPI, indicating a tissue and isoform-specific effect of SPI.

RAR β 2 mRNA abundances were not different between dietary groups except that its expression was markedly suppressed in male rats fed SPI for 310 days. DNA binding activity of nuclear RAR β was significantly attenuated and the isoelectric points of RAR β 2 were shifted by dietary SPI. Overall, these results show for the first time that dietary soy proteins affect hepatic RAR β 2 protein content and RAR β DNA binding activity, which may contribute to the suppression of retinoid-induced hypertriglyceridemia by SPI as reported.

Source: C.W., Xiao et al., 2007. *J Nutr* 137(1):1-6.

More CP does not mean more methionine

The objective of this study was to determine if the methionine (met) requirement of kittens is correlated with the concentration of dietary crude protein (CP). The study used 48 male kittens in two replications of six 4 X 4 Latin squares, each representing one concentration of met (1.5, 2.5, 3.5, 4.5, 6.0 or 9.0 g/kg diet) with four CP concentrations (150, 200, 300 and 500 g/kg diet) in two-week periods. Cystine was present in the lowest CP diet at 5.3 g/kg diet and increased as dietary CP increased. Body weight gain, food intake, nitrogen balance and plasma amino acids, glucose, insulin, cortisol, somatomedin C, T3 and T4 concentrations on day 12 were measured.

From breakpoint analysis of the nitrogen retention curves, the met requirement of kittens was found to be 3.1, 3.8, 3.1 and 2.4 g met/kg for the 150, 200, 300 and 500 g CP/kg diets, respectively. When met was limiting (1.5 or 2.5 g/kg diet), increasing dietary CP did not decrease, but rather increased food intake, body weight gain and nitrogen retention. Plasma met concentrations increased as dietary met increased, and at 2.5–3.5 g met/kg

diet were not different among kittens fed the various CP diets. Total plasma T3 and T4 increased significantly as dietary CP increased in kittens given the 2.5 and 4.5 g met/kg diets.

Results indicate that food intake and possibly altered hormonal secretion play a role in this growth response. In conclusion, the met requirement of growing kittens, unlike omnivores and herbivores studied, was not positively correlated with the concentration of dietary CP.

Source: M.J. Strieker et al., 2007. *JAPAN* (OnlineEarly Articles).

Y₂O₃ as an inert marker in digestibility studies

The study evaluated the use of yttrium oxide (Y₂O₃) as an inert marker in studies of apparent total tract digestibility in dogs, blue foxes and mink. Comparison was made with total fecal collection and use of chromic oxide (Cr₂O₃) as marker, respectively. Four experimental diets with added 0.1 g/kg yttrium oxide and 10 g/kg chromic oxide and fed to four animals of each species.

Fecal recovery of yttrium oxide was 94.4% (SEM \pm 1.0), and of chromic oxide 105.8% (SEM \pm 1.5). The digestibilities of dry matter, crude protein, crude fat, starch and total carbohydrates

Key Concepts

► Dietary soy protein isolate effects in rats

(*J Nutr* 137(1):1-6): This study examined the effect of dietary SPI and isoflavones (ISF) on hepatic RAR gene expression and DNA binding activity.

► More CP does not mean more methionine

(*JAPAN* OnlineEarly Articles): The methionine requirement of growing kittens, unlike omnivores and herbivores studied, was not positively correlated with the concentration of dietary CP.

► Y₂O₃ as an inert marker in digestibility studies

(*JAPAN* OnlineEarly Articles): Yttrium oxide can be used in low concentration in the feed, allows high accuracy of analyses and thereby precise digestibility determination.

► Dietary patterns of cats with cardiac disease

(*JAVMA* 230(6):862-867): Results for dietary supplement use, food use for medication administration and treat feeding may be useful for treating and designing nutritional studies.

obtained by total collection and yttrium oxide as marker showed close similarity and, in most cases, not significant differences, independent of species and diets. In dogs, overall digestibilities of main nutrients with chromic oxide as marker were not significantly different from overall means obtained with yttrium oxide ($p > 0.05$).

In dogs and blue foxes, digestibilities of individual amino acids were not different from values obtained using total collection of feces, both within diets and for overall mean ($p > 0.05$). Overall amino acid digestibilities in dogs determined with chromic oxide as marker were similar to corresponding figures for yttrium oxide, whereas use of chromic oxide resulted in significantly higher digestibilities for a number of amino acids compared with yttrium oxide in foxes and mink ($p < 0.05$).

Yttrium oxide can be used in low concentration in the feed, allows high accuracy of analyses and thereby precise digestibility determination. It is concluded that yttrium oxide is an alternative inert marker to chromic oxide in the studied species.

Source: S.G. Vhile et al., 2007. JAPAN (Online Early Articles).

Dietary patterns of cats with cardiac disease

This study was undertaken to determine nutrient intake and dietary patterns in cats with cardiac disease. For this prospective study, 95 cats with congenital cardiac disease or primary cardiomyopathy were utilized. Pet owners completed a standardized telephone questionnaire regarding their cats' diet and a 24-hour food recall to determine daily intake of calories, fat, protein, sodium, magnesium and potassium.

Of the 95 cats, 18 (19%) had a history of congestive heart failure and 73 (77%) had no clinical signs of cardiac disease. Fifty-five percent (52/95) of cats had concurrent disease. Inappetence was reported in 38% (36/95) of all cats and in 72% (68/95) of cats with a history of congestive heart failure. Most (57% [54/95]) cats received treats or table scraps on a regular ba-

sis. Approximately half the cats were receiving orally administered medications, supplements or both.

Only 34% (32/68) of owners used food to administer medications to cats. Cats consumed more than the AAFCO minimums for protein, sodium, potassium and magnesium, and nearly all cats consumed more than the AAFCO minimum for fat. Daily nutrient intake was variable for all of the nutrients assessed.

Dietary intake in cats with cardiac disease was variable, but results for dietary supplement use, food use for medication administration and treat feeding were different from those found in a similar study of dogs with cardiac disease. This information may be useful for treating and designing nutritional studies for cats with cardiac disease.

Source: D.S. Torin, L.M. Freeman and J.E. Rush, 2007. JAVMA_230(6):862-867.



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DAVID LUMMIS
PET MARKET ANALYST,
PACKAGED FACTS



GREG ALDRICH
CONSULTANT,
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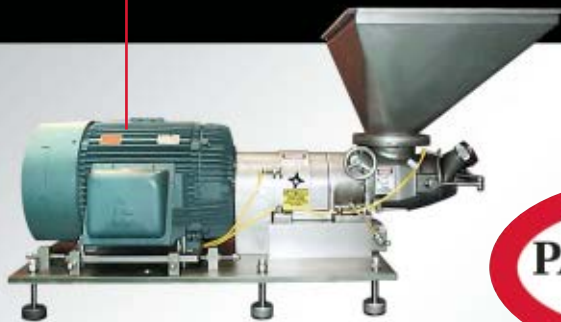
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► **ADSA/ASAS/PSA Joint Annual Meeting**, July 8-12, 2007, San Antonio, Texas, USA. Contact: Poultry Science Association, 1111 N. Dunlap Ave., Savoy, IL 61874 USA, Tel: +1.217.356.5285, Fax: +1.217.398.4119, Website: www.poultryscience.org.

► **AVMA/AAAP Annual Convention**, July 14-18, 2007, Washington, D.C., USA. Contact: AVMA, Tel: +1.847.925.8070, Fax: +1.847.925.1329, E-mail: avmainfo@avma.org, Website: www.avma.org.

► **IFT Annual Meeting and Food Expo**, July 26-30, 2007, Chicago, Illinois, USA. Contact: Institute of Food Technologists, Tel: +1.312.782.8424, Fax: +1.312.782.0045, E-mail: info@ift.org, Website: www.ift.org.

► **AAFCO Annual Meeting**, August 1-4, 2007, Amway Grand Plaza Hotel, Grand Rapid, Michigan, USA. Contact: Gina Davis, Tel: +1.517.241.2084, E-mail: DavisG9@michigan.gov, Website: www.aacomichigan2007.com.

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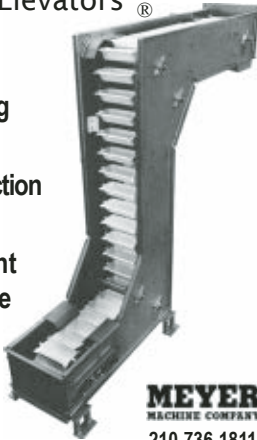
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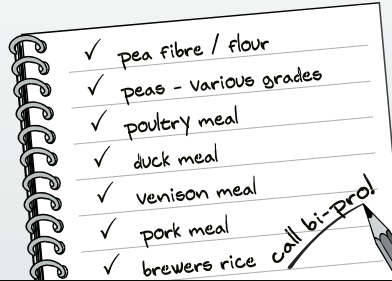


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The Internet abhors a vacuum

The phrase “public relations” was coined by Thomas Jefferson during a presidential address to the US Congress in 1807. That is, if you can believe anything you read on the Internet. (This particular piece of information comes from www.wikipedia.com.)

When it comes to managing major public relations (PR) crises, Johnson & Johnson’s handling of the Tylenol tampering incident in 1982 is often held up as the gold standard. (See “Learning from a sad and messy crisis” on p. 28.)

But one key element J&J didn’t have to factor in back then was the Internet and digital media—the many immediate ways consumers receive and even contribute to news and information today.

Witness the petfood recalls and the constant, intense attention they have received from consumers and the media. That is partially due to the emotions inherent in the situation and the strong connection people have with their pets. But it is also because the second any news—real or perceived—happens, it shows up instantly on computer screens and mobile devices. Not to mention that anyone who has an opinion or story to share can do so for all the world to see on a blog or another form of Internet communication.

Recipe for disaster?

While it’s certainly understandable that petfood companies have (as of press time) been very careful about releasing recall-related statements or communicating with the media or consumers, not doing anything may be a recipe for disaster, at least from a PR sense.

Lack of information and communication is being filled with opinion and emotion.

— Debbie Phillips-Donaldson



As the saying goes, nature abhors a vacuum, and in this case the vacuum—lack of information and communication—is being filled at lightning speed with opinion, emotion and speculation. With a few facts thrown in for seasoning.

Type “petfood recall and PR” into any search engine and you’ll get quite a mix. In my search, only a handful of the returns had any direct relation to a petfood company—for example, a press release from a company attempting to disassociate itself and its products completely from recalled ones and from wheat gluten.

I also came across an *Advertising Age* article describing Procter & Gamble Co.’s newspaper ad campaign aimed at reassuring pet owners about the safety of its petfood products still on retail shelves (http://adage.com/article?article_id=115908).

The rest of my returns were press releases from people who may or may not be experts on animal nutrition, offering tips to consumers on how to safely feed their pets. And then there were the blogs.

Taking basic steps

Love ‘em or hate ‘em, blogs are a fixture of today’s communication scene, and they get plenty of hits along

with responses of varying relevance and factuality. I found a posting by an editor of the *Orlando Sentinel* newspaper about the recalls’ potential impact on Menu Foods’ share price on the Toronto Stock Exchange. The responses ranged from pet owners asking if a particular food was safe to condemnations of the industry to advice from a PR professional, complete with his name and company information.

Despite the blatant self-promotion, I thought his tips were pretty basic and commonsense. And I couldn’t help wonder why very few petfood companies have begun implementing any steps like them.

Anyone could read these blog postings and think they all make sense, especially if he or she has limited knowledge of animal nutrition, petfood or the recalls, or has a lot of emotion invested. (That might be an apt description of many pet owners.)

If this is the only “information” the person has, the impression he or she forms of our industry—or your company and products—may not be one that any of us like. ●

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



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