

December 2007

# Petfood Industry

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Will private label sales rebound?

6 steps to successful exporting

Innovations in extrusion

## Cargill becomes a player

Frank Ziacik and Todd Hall, p. 18

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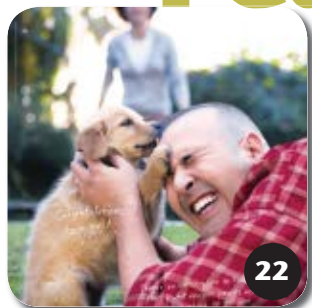
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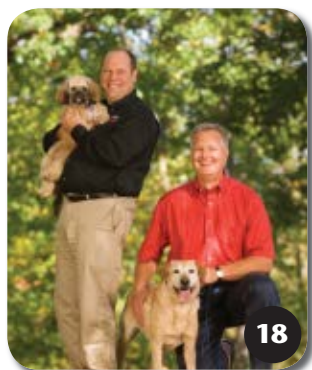
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Photo by Steve Voit Photography (<http://www.stevewoit.com>)

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So far, the economic relationship with you has been beneficial overall for most countries. But I'm worried about the long-term. Will our relationship lead to stifled opportunity for workers in developed nations and a weakening of our efforts to stay ahead in the global economy? I know these are not really your problems. I guess it's time for us to make better choices in our relationship so that we can protect our future.

## China makes, the world takes

The preceding was inspired by an article I just read on the the *Atlantic Monthly* website ([www.theatlantic.com](http://www.theatlantic.com)). The article, "China makes, the world takes," is by James Fallows, a journalist based in Shanghai. In it, he points out that, for brand owners, the real money is in brand name and retail—the two areas where developed economies are strong. China's strength is in fast and low-cost manufacturing, at least for now.

Companies often turn to China when they have built up a brand name and relationships with retailers and need to save time and money in manufacturing a product. That is where China can help, says Fallows, because it has factories for many products that are better than factories in any other country.

**We need to consider the economic, environmental, political and social goals we care about defending.**

— Tim Phillips



## Happy with crappy?

At the moment, the primarily young women in Chinese factories are not taking jobs from highly developed economies, says Fallows, because in such countries these assembly-type tasks would be done by machines. But the Chinese goal is to build toward something more lucrative.

Many predict the climb to more lucrative jobs will be slow for Chinese industries, because they have so far to go in bringing their design, management and branding efforts up to world standards. China has a limited pool of executives with adequate foreign-language skills and experience working abroad, notes Fallows. Another problem is that too often the Chinese outlook toward quality control is "happy with crappy." But that is changing.

## Are high-paying jobs next?

Fallows emphasizes that higher-paying jobs are associated with innovations that stem from areas where

China is weak:

- Strong universities with good independent research;
- Intellectual property protection;
- The rule of law and sanctity of contracts; and
- An ethic of trust.

Developed economies need not be hostile toward China's rise, according to Fallows, but they should be wary about its eventual effects. He contends, "The US is the only nation with the scale and power to try to set the terms of its interaction with China rather than just succumb." So starting now, we need to consider the economic, environmental, political and social goals we care about defending as Chinese influence grows.

Finally, consider what President John F. Kennedy said in 1963: "Liberty without learning is always in peril. To govern is to choose and making wise decisions requires the best of all of us. We must move ahead swiftly." Meanwhile over the past 30 years, at least in the US, high school graduation rates have plummeted. ●

### Online extra!

To hear an audio of President Kennedy's remarks, go to [www.petfoodindustry.com/JFK.aspx](http://www.petfoodindustry.com/JFK.aspx).

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



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# Industry News

## Patent awarded to Seasons Petfood

Roman Versch, the owner and founder of the Los Angeles based Pet Depot chain, has made a career of studying the shopping habits of dog and cat owners. "I've always been somewhat surprised that despite all of the attention paid to developing healthy petfood, no one has really looked at the role that the changing seasons play in the life of a dog or cat," says Versch.

In October 2006, the US Patent Office awarded Versch a patent entitled "Selected Climate Change Control of Petfood Formulation and Distribution." Following up on his patent, Versch founded Seasons Petfood Co. with the idea of selectively licensing his formula to companies capable of global and

multichannel petfood distribution.

"Shedding is a profound, and perhaps the most obvious, effect that seasonal changes have on dogs and cats, but it is by no means the only one," declares Versch. "These seasonal changes make different demands on pets, so it makes sense to address the changes in a pet's diet. When you neglect seasons, you're ignoring one of the most profound influences in the lives of almost every animal." Seasons Petfoods are formulated to increase protein and fat in the winter and decrease protein and fat and increase omegas for the summer.

## Hills donates food, Iams establishes helpline

Iams established an emergency assistance helpline for Southern Califor-



## Speakers announced for Petfood Forum Asia

Petfood Forum Asia will take place March 5, 2008, in Bangkok, Thailand, in conjunction with Victam Asia 2008 ([www.victam.com](http://www.victam.com)). Keynote speakers for this highly anticipated, international event include:

- ▶ Maria Trombly, Trombly Ltd.—global and Asian petfood sales trends.
- ▶ Julie Lenzer Kirk, Interstates Companies—petfood safety and traceability.
- ▶ David Southey, Southey Consultants Ltd.—advances in pet nutrition.
- ▶ Dr. Anton Beynen, Vobra—new and functional ingredients.
- ▶ Chris Nelson, Kemin—advances in palatability.
- ▶ Brian Kim, E-mart—the future of petfood retailing.
- ▶ Will Henry, Extru-Tech—treat extrusion.

Registration for Petfood Forum Asia, Petfood Forum 2008 and Petfood Focus on Safety is now available via a new online system, accessible at [www.petfoodindustry.com/petfoodforum.aspx](http://www.petfoodindustry.com/petfoodforum.aspx). Register today!



nia pet owners affected or displaced by the wildfires devastating the area at the end of October. Pet owners concerned about their animals or dealing with evacuation-related issues were encouraged to call the Iams Pet Helpline at +1.800.508.9275 for information or to speak with a pet wellness professional.



Through its Friends for Life Fund, Iams also donated two 9,000 pound shipments of dog and cat food to its partner, the Helen Woodward Animal Center, located in Rancho Santa Fe, California, USA. The petfood donation helped support the many animal shelters and rescue organizations in and around Southern California.

Hill's Pet Nutrition Inc. shipped

about 50,000 pounds of Science Diet and Prescription Diet to relief organizations in California to help feed displaced pets. Hill's representatives worked with veterinary clinics and provided them food for dogs and cats that were kennelled or had special needs and normally eat one of Hill's Science Diet or Prescription Diet formulas.

## New safety program for petfoods

Natural Balance Pet Foods unveiled its new safety program, the Consumer Buy With Confidence Program, during Backer's 41st Annual Pet Industry Trade Show, which took place in October in Chicago, Illinois, USA. The program allows petfood consumers to see exact safety testing results of every product the company offers. The online screening is accessible at <http://naturalbalanceinc.net/petfoodscreening.tpl>.



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## ASA upholds complaints against Pedigree TV ad

The Advertising Standards Association (ASA) has upheld complaints, including one from Burns Pet Nutrition, against a TV advertisement by Mars Petcare for its Pedigree Joint Care Plus dog food. Four viewers challenged whether the commercial had exaggerated the likely benefits of the dog food and could exploit vulnerable viewers. Burns Pet Nutrition challenged whether the ad implied that the product provided a medicinal benefit by treating or curing joint stiffness.

As part of its defense, Mars presented details of two clinical trials it had carried out on dogs using Joint Care Plus. The company said the trials showed that, after six weeks of eating the product once a day, 72% of the dogs had demonstrated improved mobility.

In the opinion of the Veterinary Medicines Directorate (VMD), the dramatic difference in the mobility of the dog in the commercial before and after eating Joint Care Plus implied that the product would have a medicinal effect. VMD did not request withdrawal of the ad because it was intended to run for a short period and Mars had agreed to take into account the view of the VMD in future advertisements.

The ASA concluded that the Pedigree ad “misleadingly implied the product could provide medicinal benefit to those dogs suffering from joint damage and discomfort, by treating or curing that condition” and therefore exaggerated the likely benefits of the product.

“Our customers can, from their own homes, easily see the full test results of every product, and rest assured that they are giving their pet the safest food possible,” says Dick Van Patten, founder of Natural Balance.

## Del Monte to expand Topeka plant

Del Monte plans to build a distribution center near its existing Topeka, Kansas, USA, petfood plant. The new 427,000 square foot addition will provide much needed space for finished goods, give the company an opportunity to bid more projects and invest more money in new processes, according to plant manager Chris Koerber. The expansion will also bring an addition of 80 jobs, says Del Monte. Groundbreaking will be in spring 2008.

## Purina to boost production in Flagstaff

The Nestlé Purina petfood plant in Flagstaff, Arizona, USA, plans to boost production by 20%, add 50 new warehouse and production workers and build an addition to its existing warehouse. Company officials say work on

the 91,000 square foot warehouse expansion should begin in January 2008, with the warehouse expected to open in early 2009. Plant manager Bill Calloway says the expansion will help the facility better serve customers in the Western US and meet added demand.

## Menu Foods to test for painkiller in cat food

According to ConsumerAffairs.com and ExperTox Analytical Laboratories, recent laboratory tests have detected the painkiller acetaminophen in another brand of petfood. The findings came in a composite of three flavors of Menu Foods’ Special Kitty food: Special Kitty with beef and gravy, Special Kitty mixed grill in gravy and Special Kitty with turkey and giblets in gravy. The tests were performed in early October by ExperTox, who also detected the toxin of melamine in the cat food.

The samples were taken from a Rhode Island, USA, pet owner who bought the Special Kitty food in February—one month before Menu announced the nationwide recall. According to the pet owner, she sent the food in the original, unopened pouches which

she’d saved since March and stored in her freezer after her cats fell ill.

The organization Pet Food Products Safety Alliance paid ExperTox to test the pet owner’s cat food. Both acetaminophen and melamine were detected in the samples, according to ExperTox, which has led Menu Foods to announce that it will test samples of the products used in the composite sample as soon as possible.

## Alcan Packaging CEO top woman executive

Ilene S. Gordon, president and CEO of Alcan Packaging, has been named to *Fortune* magazine’s

“Global Power 50,” which recognizes the most powerful women executives in international business. Ms. Gordon was named president and CEO of Alcan in December 2006. She



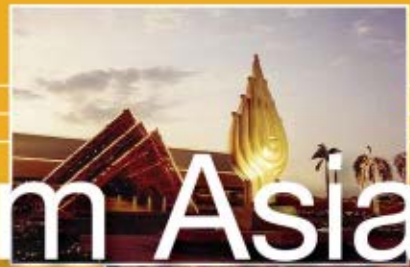
is responsible for all aspects of Alcan Packaging’s worldwide business. She currently serves as chair of the Flexible Packaging Association.

## PFI to implement recall recommendations

The Pet Food Institute (PFI), based in Washington, DC, USA, is developing a plan to implement the recommendations it recently received from the National Pet Food Commission (NPFC). PFI formed the NPFC in April to study the findings on the cause of the petfood recalls and recommend steps the industry and government can take to further build on quality assurance procedures and safeguards already in place.

Commissioners included board-certified veterinarians, state and federal feed regulatory officials, nutritionists, quality control personnel and ingredient specialists. The NPFC also recommended actions to the Food and Drug Administration, Association of American Feed Control Officials, American Veterinary Medical Association and other stakeholders.





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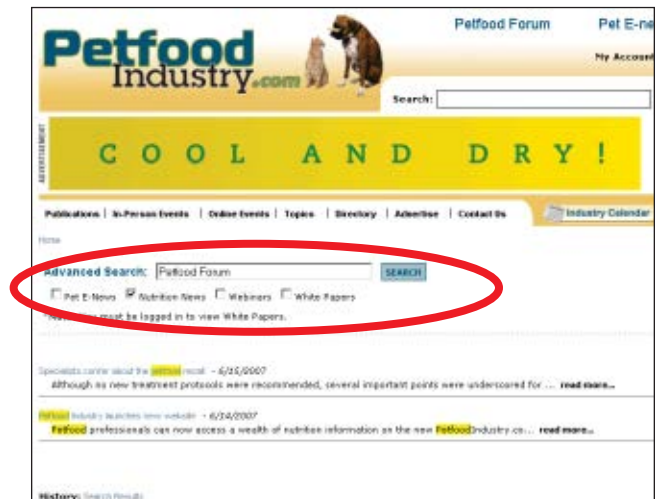
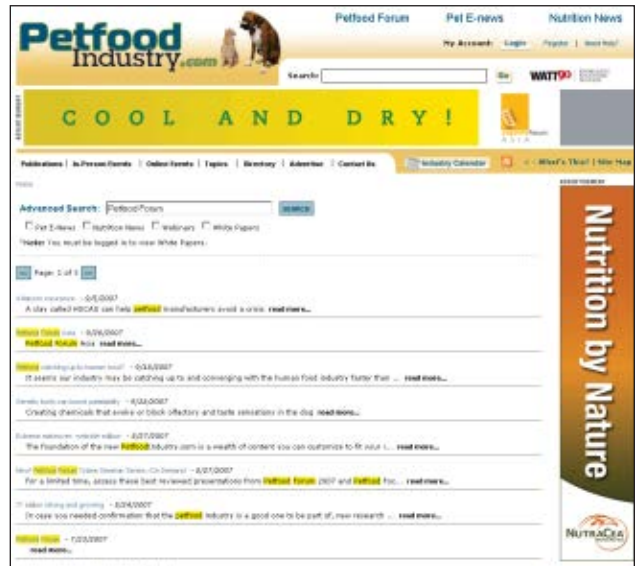
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Wellness Just for Puppy is a line of treats and dry and canned foods that are holistically formulated with increased levels of fat, according to the company. Lamb and salmon are combined with fruits, vegetables and whole grains, as well as a guaranteed level of a fatty acid called DHA. The natural treats and foods come in a variety of sizes and packages, and are available nationwide at independent pet specialty shops. [www.wellnesspetfood.com](http://www.wellnesspetfood.com)

## Organic, wheat-free dog biscuits »

Wagatha's Organic Dog Biscuits has added three new wheat-free biscuit varieties to its product line. The new varieties include the Breakfast Biscuit, Cranberry Cheddar and Tuscan Tomato & Herb. According to the company, the treats are 100% certified organic, Kosher and contain nutrients such as folic acid, calcium, iron, magnesium, phosphorus, zinc and vitamins D, E and B complex. [www.wagathas.com](http://www.wagathas.com)



## « Vegetarian chips for dogs

Aunt Jeni's Home Made now offers Snackers, a crispy, chip-like treat for dogs. The Snackers are available in Sweet Potato and Apple and are made from organic, dehydrated fruits, according to the company. The Snackers are a vegetarian alternative to meat-based, high protein treats. Aunt Jeni's says the treats are all-natural with no preservatives, yeast, soy, salt, sugar or grains. [www.auntjeni.com](http://www.auntjeni.com)

## Raw pet treats for cats and dogs »

Carnivore Kisses from Stella & Chewy's are made from 100% human-grade quality meat, free of hormones, antibiotics and steroids, according to the company. The raw meat pet treats are available in Kobe Beef, White-Meat Chicken and Bison varieties. According to Stella & Chewy's, the meat used in the Carnivore Kisses is diced and then freeze-dried in order to retain the quality of the amino acids and naturally occurring enzymes that are beneficial to cats and dogs. [www.stellaandchewys.com](http://www.stellaandchewys.com)







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The champions behind Loyall—Frank Ziatic (with Sophie), Mark Newcomb and Todd Hall (with Carnegie)—are just a few of the hundreds of Cargill Animal Nutrition staff involved in the new product line.

# Cargill becomes a player

## New premium petfood line banks on processing, packaging and channel exclusivity

BY DEBBIE PHILLIPS-DONALDSON

### Business basics

**Headquarters:** Minneapolis, Minnesota, USA

**Key staff:** Todd Hall, president; Frank Ziatic, petfood category leader; Mark Newcomb, technology manager

**Annual sales:** US\$4.5 billion for Cargill Animal Nutrition

**Brands:** Loyall, River Run, Pro Premium, Nutrena; Kliba, Iso-dog and Iso-cat in Switzerland; Dogui and Gati in Latin America

**Facilities:** Manufacturing plants worldwide

**Distribution:** Loyall in US starting January 2008; other brands in 20 countries

**Employees:** 10,000 worldwide in Cargill Animal Nutrition

**Websites:** [www.loyallpetfood.com](http://www.loyallpetfood.com), [www.nutrenaworld.com](http://www.nutrenaworld.com)

Cargill is no newcomer to the petfood industry. It has been producing and marketing dog and cat foods under its River Run, Pro Premium and Nutrena brands since the early 1960s.

But with the launch of its new Loyall premium line, Cargill is positioning itself to become a “significant player in the US petfood business,” according to Todd Hall, president of Cargill Animal Nutrition. “We see it as a natural offshoot because of the 80 years of expertise we have in the care and feeding of animals.”

### Loyalty from the get-go

Hall says the company started planning strategically about three years ago for a stronger role in petfood. That led to the promotion of Frank Ziatic to petfood category leader, Hall explains, with the purpose of developing and launching a premium brand.

That brand is Loyall, which Ziatic

describes as being built on three pillars:

1. Exclusivity to the agricultural retail (ag-retail) channel (feed and farm stores and similar outlets).
2. A special, patent-pending process called Opti-Cook.
3. Convenient packaging.

Ziatic cites the channel as the real driver behind the new line. “As we talked with our ag-retail customers, people we’re selling Nutrena products to today, we realized they were frustrated with building brands of petfoods to see them go across the street to be sold at the ‘big box’ stores,” he says. “So in combination with the feed products we were already selling them, we thought petfood would be a great fit to go with that line.”

In fact, Cargill is so committed to giving this retail channel its own line that when asked if they would ever



## Stepping up safety

“Not a lot keeps me awake at night except food safety,” says Todd Hall, president of Cargill Animal Nutrition. “I think most pet owners treat their animals as well as they do their children in a lot of aspects. So when we’re talking about human food safety, petfood safety is very similar. It’s becoming increasingly more important as we can see from the melamine example earlier this year.”

Because of that philosophy, Hall adds, Cargill is the first animal nutrition company worldwide to HACCP-certify all of its plants. “I think we have a handful, maybe less than 10, left out of 170 plants worldwide to be certified,” Hall says. “We started a system called Feed for Food, which the HACCP certification is part of. But it’s also designed to be able to thoroughly link all our employees worldwide and assure our customers that feed is part of the food chain and that food safety is important in all aspects.”

Though no Cargill products were affected by the melamine-related recalls, the company has stepped up its safety measures. “China is one of the countries where we currently have 15 plants that we own and operate, with a purchasing system and quality control system,” Hall explains. “And so we already had a supplier certification pro-

cess going on, and we just stepped it way up to include site visits from our purchasing agents in China as well as testing products. We expanded that to all the countries where we have plants and buy ingredients from.”

Part of the testing Hall refers to is linked to a propriety database of ingredients and suppliers that Cargill Animal Nutrition has built over many years, called the Optimum Value Supplier (OVS) database. According to Hall, the company produces 12.5 million metric tons of feed a year.

“That adds a huge database that we maintain on raw materials and their suppliers, and that goes back to the actual plant of origin,” explains Mark Newcomb, technology manager. “And so we understand, very intimately, the variability that each of our suppliers brings to the party. That gives us the opportunity to select those that fit the product line, both from a quality perspective, because we database every quality parameter that we measure, as well as nutrient variability.”

The data obtained during the supplier certification process and site visits now goes into the OVS database, too. “Quite frankly, before the recalls happened, no one was measuring melamine,” Newcomb says. “I can tell you that melamine is now databased.”

consider selling Loyall to a large pet store chain such as PetSmart or Petco—even if approached—the answer is immediate. “No,” Hall says flatly. “We have products that we might put through a PetSmart today. But Loyall’s not one of them. It’s going to be very, very loyal to the ag-retailer segment.” Ziacik adds that’s part of the reason for the brand’s name.

The Loyall line will be available across the US to more than 12,000 outlets in that channel. Cargill plans to expand distribution to several other countries within 12 months; it currently produces or sells its other brands, plus private label petfoods, in 20 countries.

### Like mashed potatoes

The premium line consists of eight dry foods, including a cat and kitten formula. The seven dog foods cover lifestyles and conditions such as puppy, professional, high performance, active adults, adult maintenance, lite, plus lamb meal and rice. Depending on the

formula, ingredients include poultry protein and rice, natural preservatives and natural sources of glucosamine and DHA.

“The marketing feature we really think is unique to the product is a system we call Opti-Cook,” says Mark Newcomb, PhD, technology manager.

With a patent pending, Cargill won’t give details on its new process. To explain it, Newcomb uses the analogy of mashed potatoes. “We don’t typically eat raw potato because a) it doesn’t taste good and b) it can give you an upset stomach. And we all know that if you cook potato correctly it’s good,” he says. “However, if some people are like me, and they walk out and watch ESPN while the potatoes are cooking, and then you look at those potatoes later, they kind of have a plasticized look to them. Which is the starch in the potato becoming overcooked.

“Our Opti-Cook process is related, in that we’re managing the cook correctly such that we don’t undercook or



**Comprised of eight dry foods, the Loyall line features premium ingredients, convenient packaging and a process called Opti-Cook.**

overcook the food, but we process it for the optimum needs of the dog,” Newcomb continues. That includes optimal quality and palatability.

Hall adds that Cargill sees the process as a way to set Loyall apart from the rest of the market. “We had done a lot of testing in the marketplace, and we found a large percentage of the petfoods we tested were either at the undercooked

#### Online extra!

For a video of the Cargill cover photo session, go to [www.petfoodindustry.com/cargillvideo.aspx](http://www.petfoodindustry.com/cargillvideo.aspx).

or overcooked stage,” he says.

Newcomb seconds those findings. “Even within different batches of a product, you wouldn’t see standardization, so you’d have a lot of variability in the cook, which we feel gives variability in the results your dog experiences. So the Opti-Cook process is designed

to minimize that up-and-down characterization in the cook.”

### Consumer convenience




The third part of Loyall’s positioning is its packaging: a poly-weave that’s tear- and water-resistant, according to Ziatick. The bag features an easy-open



Nutrena has been producing petfood since the early 1960s and is backed by the 80 years of experience of its parent company, Cargill Animal Nutrition.

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“When we talked to our consumers, one of the things people are still really looking for are packaging conveniences,” Ziatick says. “And a July survey on your website backed that up; convenience still ranked number two when consumers talked about petfood purchases and what’s important to them.” (See [www.petfoodindustry.com/viewnews.aspx?id=14842](http://www.petfoodindustry.com/viewnews.aspx?id=14842).)

### No stopping now

Don’t expect Loyall to be the only news or product announcement to come from Cargill over the next several years. “We are aggressively looking at developing international markets that we’re in today,” Hall says. “In Central America we’re a leading marketer, but China is relatively new to us. So places like China are fertile ground for large petfood growth in the future. Eastern Europe would fall into that category.”

Global expansion is just a start. “When it comes to innovation, we’re not going to stop,” Ziatick says. “Mark’s team has so many things going ... Opti-Cook is just the first step.”

“For me, it’s exciting to be able to help translate what we know from 80 years of work feeding animals and understanding animal nutrition, and apply that to other species,” Newcomb adds. “It’s a fun thing technically and an exciting thing for the future.” ●



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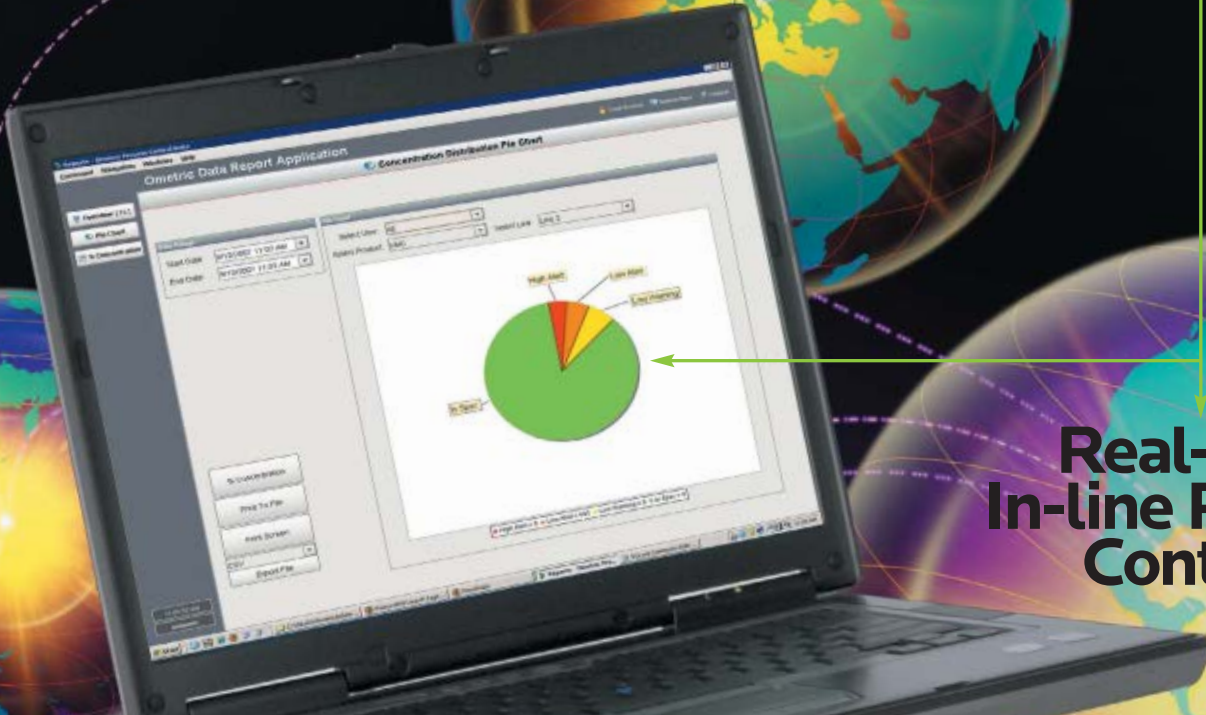
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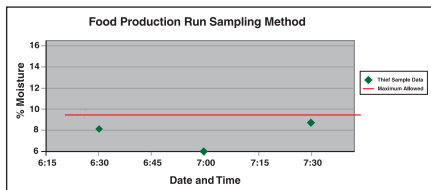


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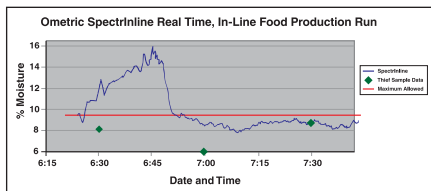


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# Will private label petfood sales rebound?

## Globally, the shift toward premium petfood is depressing the growth of private label petfoods

BY LEE LINTHICUM

**A**lthough private label products occupy a prominent position in the dog and cat food marketplace, Euromonitor International data shows that their overall global market value share fell slightly from 10.8% to 10.6% between 2003 and 2006. However, beneath this headline decline a more complex picture of regional and category trends emerges, and, taken together, these trends suggest that private label dog and cat food will pose a renewed threat to branded products in the medium term.

### Premiumization hurts private label

The main factor behind the decline in the relative importance of private label dog and cat foods in developed economies has been the premiumization of the market. The value share of dog and cat food sales accounted for by

premium brands globally has jumped 10%, to 43.7%, in the 10 years to 2007, while that of economy brands fell from 18.9% to 16%. Meanwhile, the mid-price segment fell by 7% during this period, to 40.3% of total dog and cat food sales by value.

Globally, Euromonitor data shows that private label products accounted for 42.2% of economy dog and cat food value sales in 2006, compared with just 3.9% in the premium category. Clearly, this shift toward premium petfood is depressing the growth of private labels. Increasingly aware of the impact that this trend is having on their bottom lines, private label petfood manufacturers are attempting to increase their presence in the premium segment, with Euromonitor data showing that their share of value sales in this segment rose 1.2% during the period 2000-06.

### Private label more accepted in Western Europe

There is a significant difference between North America and Western



**Petsmart may have built up enough equity in their petfood private label brand, Authority, to convince consumers that it offers greater value than traditional branded products without sacrificing quality.**

Europe (the only two regional markets in which there is a significant private label presence in the premium segment). Private labels accounted for 6.9% of premium dog and cat food value sales in Western Europe during 2006 (up from 6.6% in 2000), compared with just 3% in North America (albeit up from 0.9% in 2000).

Western European consumers appear to be more price sensitive than their North American counterparts: This is reflected in Euromonitor data showing that annual expenditure per pet in the US rose from US\$45.20 to US\$63.10 between 1998 and 2007, while in Germany, spending grew by just US\$0.40, to US\$47.40, over the same period.

### Crucial role of pet superstores

Private label petfood manufacturers are appealing to potential customers in

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the premium segment by tapping into the same trends as their branded counterparts, using better quality or organic ingredients and incorporating functional properties into their offerings in order to appeal to the anthropomorphic instincts of pet owners, as well as targeting specific life stages. However, premium private label products still represent something of a counterintuitive proposition for consumers, many of whom remain skeptical that private labels represent an effective substitute for branded goods in the premium segments. It may take some time for this perception to be overcome.

Pet superstores could play an important role in bridging this gap, as some of the more prominent among them may have built up enough equity in their retail brands to convince consumers that they can offer them greater value than traditional branded products without sacrificing quality. Although Wal-Mart and Target launched their own premium petfood products (Natural Life and LIFElong, respectively) during 2006, it is unlikely that such non-specialist retailers as supermarkets and supermarkets will be able to replicate this type of relationship.

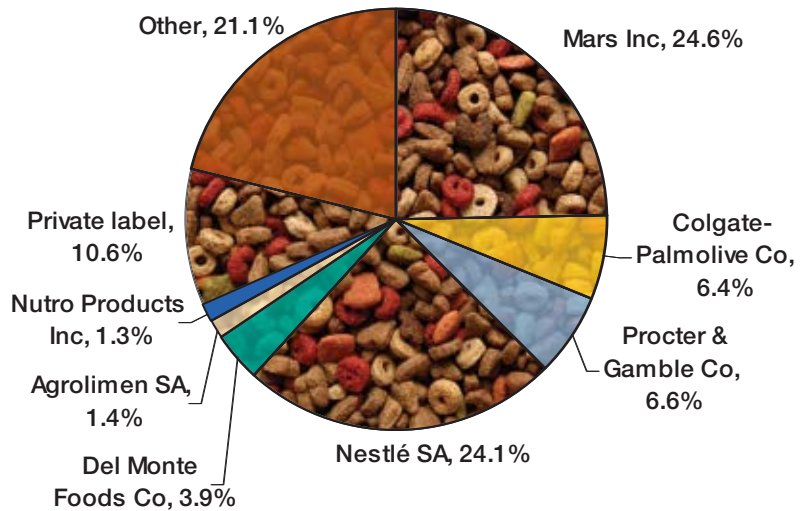
### German market a harbinger?

This trend is already visible in Germany, where Euromonitor data shows that pet superstores accounted for 28.6% of overall value sales in the petfood and pet care market in 2007 and private labels accounted for 35.7% of premium dog and cat food sales in 2006. In the US (where pet superstores have grown their share of petfood sales from 19.9% to 22.1% between 1998 and 2007), the likes of PetSmart and Petco are also well positioned to emulate this success.

### Developing economies

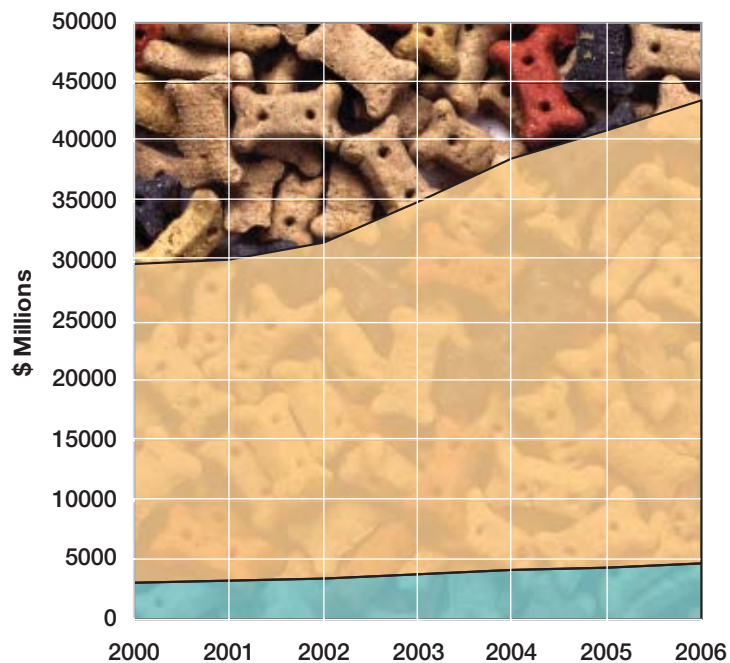
In the developing world, private labels have only a marginal presence in the mid-price dog and cat food segment and none at all in the premium segment. However, they do have a notable presence in the economy segment, accounting for 16.2%, 8.2% and 10.1%

## Dog and cat food: 2006 global market shares



The market share of private label petfoods fell slightly from 10.8% to 10.6% between 2003 and 2006, according to Euromonitor.

## Total sales of branded and private label cat and dog food



■ Branded Products  
■ Private Label

The shift toward premium petfood is depressing the growth of private labels, according to Euromonitor.

of value sales in Eastern Europe, Latin America and Asia Pacific, respectively, according to Euromonitor data. In these regions, volume growth arising from a combination of rising rates of retail penetration and a reduction in poverty rates are the most important drivers of increased petfood sales.

In China, for example, local pet superstore chain Cool Baby is beginning to shift its expansion strategy away from Shanghai and Beijing and toward such second-tier cities as Nanjing and Yantai. Similar trends are also evident in India, provincial Russia and northern Brazil. This growth will provide excellent op-

## The interplay of these conflicting reactions to the recalls will be complex.

portunities for private label manufacturers to increase their market share, particularly as many of these new consumers will be extremely price sensitive.

### Recalls intensify instability

To a degree, the manner in which these developments are played out in the longer term, particularly in North America, will be influenced by the recalls of spring 2007. On the one hand, it could prompt a flight to quality as consumers seek the reassurance of quality they believe branded products provide. On the other hand, the fact that both branded and private label products have been affected by the recall may, to an extent, lift the veil from the eyes of consumers regarding the true extent of the quality differential between branded and private label petfood products. This could boost private label sales if it makes consumers more skeptical regarding the advantages of branded petfood.

The interplay of these conflicting reactions to the recalls will be complex, and branded petfood manufacturers will have to increase their marketing budgets to protect their market shares, as well as paying increased attention to their raw material sourcing, as traceability is likely to command a premium. The most likely outcome of the recall is that it will provide a window of opportunity for private labels to exploit. ●

*Lee Linthicum is the global petfood and pet care research manager for Euromonitor International (www.euromonitor.com). Contact him at lee.linthicum@euromonitor.com.*



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# 6 steps to successful exporting

## APHIS can help US exporters meet the import requirements of other countries

BY TIM PHILLIPS, DVM

**P**etfood companies that export, or want to export, can make it as painless as possible by following six steps. This article is based on Animal and Plant Health Inspection Service (APHIS) guidelines and assumes the exporter is from the US. However, much of it applies to a petfood exporter from any country, but instead of APHIS the home country's inspection service will be used.

### The role of APHIS

The National Center for Import and Export (NCIE) is at the forefront of APHIS' effort to safeguard the health of US agricultural resources. Its many animal health experts work closely with other federal agencies, states, foreign governments, industry, trade associations, professional groups and others to enhance international trade and cooperation, while preventing the introduction of dangerous and costly pests and diseases.

The primary role of APHIS is to assist US exporters in meeting the import requirements of other countries. In this role, APHIS negotiates with foreign governments to establish export requirements. The agency also does the following:

- Inspects exporting facilities if required by the importing country.
- Maintains lists of approved facilities as needed and provides this information to foreign governments.
- Assists exporters when products are put on hold overseas.
- Explains APHIS policies to foreign officials and the general public.

### The exporter's role

Countries may change their import requirements with-

out notice. In all cases, the exporter has the responsibility of having their importer confirm with the responsible authority in the importing country the import requirements prior to shipping. The exporter should obtain any required animal health product certificates prior to shipping any product. Most countries will not recognize zoosanitary certificates issued after products have shipped.

### 1. Use right requirements

The Veterinary Services (VS) branch of APHIS has created the International Animal Product Export Regulations (IREGS) to provide exporters of certain animal-origin products with the requirements of importing countries. These IREGS are detailed at [www.aphis.usda.gov/ncie/iregs/products/](http://www.aphis.usda.gov/ncie/iregs/products/). IREGS are invaluable for finding the latest requirements for exporting petfoods to various countries around the world, but should be verified with the importer in all cases, because countries may change their requirements at any time.

If you have any questions or concerns regarding the procedures and requirements to obtain a health certificate for an animal product being exported, you should contact the VS Area Office covering the area from where the product will be exported (or the area in which your office is located). To find out the VS Area Office to contact, go to [www.aphis.usda.gov/animal\\_health/area\\_offices/](http://www.aphis.usda.gov/animal_health/area_offices/). There are two import/export VS Area Offices:

- Eastern region, +1.919.855.7242.
- Western region, +1.970.494.7370.

**The APHIS International Animal Product Export Regulations (IREGS) provide US exporters with the requirements of importing countries.**



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australia 61.359.711105  
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## 2. Prepare export certificate

Different countries require different paperwork. The VS Form 16-4 is the generic export certificate for animal products and can be obtained through your APHIS area office. It is only used for products that contain animal-origin ingredients.

For countries that do not accept the VS Form 16-4, APHIS uses “Letterhead Certificates.” You can apply for one by contacting your Veterinary Services area office. Once you complete the appropriate form, the area office will copy it onto their letterhead, add a certificate number and then sign and seal it.

## 3. Have all documents

Any export certificate that indicates a product has been tested may not be endorsed until the test results have been verified. If a negative result is cited or a product is said to be “free” of something, lab results are needed.

Test results must clearly support the statement listed on the certificate and relate to the lot of material being certified.

If a statement on the export certificate is not based on an affidavit, it must be confirmed by inspection. If the importing country requires the exporting facility to be inspected, make sure it is done prior to export. Remember, APHIS-NCIE will not sign a statement they cannot verify.

## 4. Obtain prior to export

Many countries, including European Union (EU) countries, require export certificates to be endorsed prior to the date of export. APHIS will not predate or postdate an export certificate. VS area offices have been authorized to date export certificates with the date they are received in their office. Offices usually complete certificates in 24-48 hours. But, sometimes they may be delayed due to workload or movement of personnel.

## What exporters need to do

1. Make sure you are using the most current export requirements.
2. Properly prepare export certificate and affidavit (if needed) to send to the APHIS area office.
3. Have other documents as needed (test results).
4. Ensure that your certificate is obtained prior to the date of export.
5. If applicable, request re-inspections of export facilities in a timely manner (two months prior to export).
6. Have as many export inspections done at one time as possible.

## 5. Request timely re-inspections

To meet EU requirements, many facilities must be inspected and approved. Please note that the inspection date is the date the facility was physically inspected. The approval date is the date the facility was actually approved as meeting all the requirements. These dates can be weeks apart, so it’s important for facilities to be aware of both dates. Facilities must be re-inspected one year from the inspection date. In order to prevent lapses in approval, exporters should start the re-approval process two months before the anniversary of your inspection date.

## 6. Make inspections efficient

If you are exporting to several different countries and will need several export certificates, ask that the APHIS inspector do as many inspections as possible at the same time.

## Useful resources

Exporting your petfood products can be a confusing process and keeping up with the most up-to-date information can be difficult. The following resources can help.

**Facilitating trade:** USDA’s National Center for Import and Export (NCIE) helps facilitate trade of agricultural products through defining criteria for trade. Go to [www.aphis.usda.gov/ncie](http://www.aphis.usda.gov/ncie).

**Import requirements:** The International Animal Product Export Regulations (IREGS) site provides exporters with the APHIS understanding of importing countries requirements for certain animal-origin products. These IREGS are detailed at [www.aphis.usda.gov/ncie/iregs/products](http://www.aphis.usda.gov/ncie/iregs/products).

**The USDA’s Foreign Agriculture Service (FAS):** provides links and information to the offices and responsible parties for countries around the world. If NCIE doesn’t have the information you are looking for, FAS contacts can often help clarify specific

Here are the countries that import the most US petfood, according to the USDA’s FAS. Listed here are the value of exports to these countries (US\$ thousands). Rankings based on 2006 data.

### Top importers

Country	2006	2006 vs. 2005
Canada	393,364	+16.2%
Japan	235,498	+24.5%
Mexico	93,462	+8.9%
Australia	46,766	+45.1%
Belgium	27,467	+39.6%
Taiwan	25,189	+22.9%
South Korea	21,238	+7.6%
New Zealand	18,550	+25.4%
Hong Kong	16,020	+22.7%
Israel	13,124	+16.6%
United Kingdom	11,823	+7.8%
Philippines	8,462	-16.9%



country requirements ([www.fas.usda.gov/scripts/w/fasfield/ovs\\_directory\\_search.asp](http://www.fas.usda.gov/scripts/w/fasfield/ovs_directory_search.asp)).

**APHIS area offices:** Area offices provide health certificate endorsements, are knowledgeable about country requirements, provide export certifications and are essential in facilitation of accurate trade documentation. Go to [www.aphis.usda.gov/animal\\_health/area\\_offices](http://www.aphis.usda.gov/animal_health/area_offices).

**Export certificate forms:** The VS Form 16-4 is the generic export certificate for animal products, and can be obtained through your APHIS area office.

**Export data:** The USDA's FAS is also a source of a plethora of export data from around the world. Go to [www.fas.usda.gov/ustrade/ustexbico.asp?QI](http://www.fas.usda.gov/ustrade/ustexbico.asp?QI).

**Export basics:** [www.export.gov](http://www.export.gov) provides information regarding export basics, market information, tariff rates, trade leads, etc. It is a collaborative effort of 19 government agencies.

## APHIS negotiates with foreign governments to establish export requirements.

### Market Access Program

US exports of petfood are growing and exceed \$1 billion. The Pet Food Institute (PFI) uses the Market Access Program (MAP), which is part of the FAS within the USDA. MAP includes a program that matches marketing funds for promoting US petfoods in other countries.

The PFI MAP program was launched in 1993. The program currently operates in Japan, Mexico, China, Chile, Russia, Taiwan and Central America. In 2007 PFI received US\$1.3 million for promotion of non-branded US petfood. PFI MAP activities focus on consumer education and outreach to veterinarians. The program is a major contributor to building markets and maintaining access for US products.

PFI has submitted an application for funding for next year. The final award amount is determined by the Farm Bill. For more information, contact Kurt Gallagher at PFI in Washington, DC, USA, Tel: +1.202.367.1120, [kurt@petfoodinstitute.org](mailto:kurt@petfoodinstitute.org).

#### Online extra!

To see a recent presentation on exporting by Dr. Joyce Bowling-Heyward of APHIS, go to [www.petfoodindustry.com/export.aspx](http://www.petfoodindustry.com/export.aspx).



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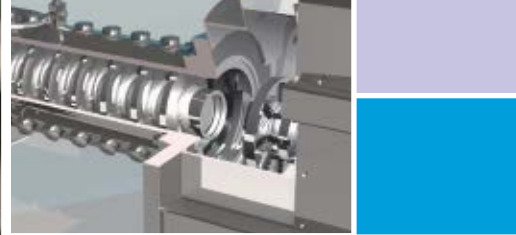
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# Innovations in extrusion

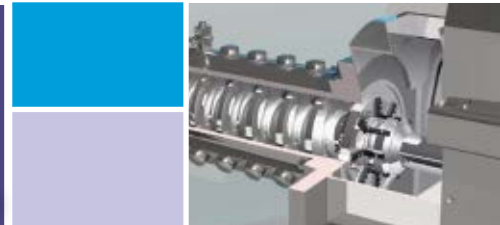


**Left:** According to Clextrol, its metallurgy significantly outperforms standard materials due to its high densification, which provides increased ductility and hardness.

**Right top & bottom:** The Kahl Extruder from Amandus Kahl has a die plate that is fitted on a hydraulic piston and can be supplied with steam jacketed barrel housing and friction discs.

## Extrusion advances that will upgrade production and reduce downtime

BY JESSICA TAYLOR BOND



Improving plant performance and upgrading production are constant concerns of everyone in our industry from the highest executive to the people on the production lines. Focusing on processing developments is often the key to a successful investment that leads to a good return and a higher standard of quality in the end product. New extrusion products and processing technologies are the fastest ways to reach these goals.

### Control product characteristics with die design

Innovations in die design including hydraulically adjustable dies and die-interchange systems provide faster and simpler changes from one die to another during the extrusion process. These improvements to die design have also led to greater flexibility and control over product density and shape.

Extru-Tech Inc. offers the Multi-Color/Multi-Shape Die System, an example of a die-interchange system designed for single screw cooking extruders. The die assembly design allows the production of multiple colors and multiple shapes of finished product simultaneously and is revolutionary in the industry, according to the company. The system eliminates the need for post-run mixing and blending

of product without reducing production capacity, thereby reducing costs and improving profit. It is available in a variety of configurations—two, three and four color—to allow for tailoring the number of product colors and product shapes in a single production run application.

Amandus Kahl has recently introduced the Kahl Extruder, which is different from common, older model extruders because the die plate is fitted on a hydraulic piston. The die can be removed from the extruder outlet during operation. The handling of the machine is much less complicated compared to a normal extruder with a static die because of the easy start-up and quick pressure relief in case of blockages. The extruder can also be

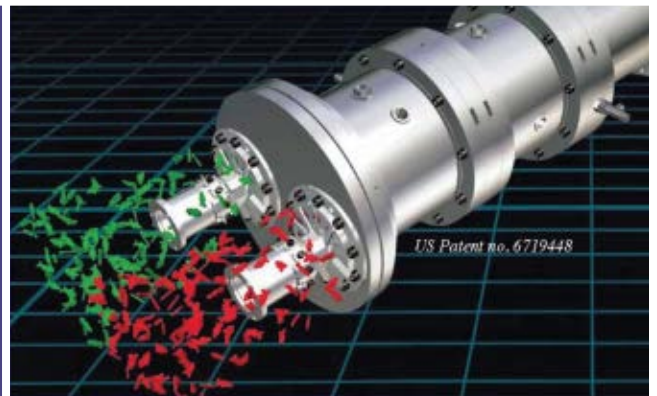
supplied with steam jacketed barrel housing and friction discs.

### Use hardware to improve process stability

Wenger has new technology for single or twin screw extruders with rotating elements designed to impact more shear and mixing compared to mixing lobes. Homogenizing screw elements improves mixing and is very effective for use in high meat recipes and those high in internal fat.

An adjustable back pressure valve (BPV) has several new features including a third position for relief of die pressure, as well as a reject position and process position. The stem now accepts inserts with round openings and an electric drive is available on the BPV to re-

Available in a variety of color configurations, the Multi-Color/Multi-Shape Die System from Extru-Tech allows for the tailoring of the number of product colors and product shapes in a single production run.





place hydraulic drives. The BPV varies extrusion restriction independent of the die, diverts product from the die/knife area during startup or maintenance and allows for adjustments to be made on-line while the system is in operation. The main benefits of BPV are:

- ▶ Diverting off-spec product for improved sanitation and quality control;
- ▶ The ability to service die/knife/conveyor without stopping the extruder process;
- ▶ On-line adjustment of specific mechanical energy to control product properties;
- ▶ Improving process stability; and
- ▶ Eliminating extruder configuration changes.

Also new from Wenger is the Quick-change Breaker Plate, a plate with holes that is inserted between screw and die. The filter helps with uniformity of product, collects foreign material, controls back-pressure and is changeable during operation. The Breaker Plate can oper-

ate at up to 10,000 PSI.

Extended Wear knife blades from Wenger wear as much as 11 times longer than originals and decrease wear cost by as much as 53%. The knives also significantly reduce the amount of time necessary to set the blades and minimize the product quality cycles usually associated with worn blades.

### Reduce wear with metallurgy

Clextral has addressed the extruder wear issues of processors by conducting research in high density metallurgical solutions for twin screw extruders. This led to the development of premium

metallurgy that increases the operating life of extruder screws and barrels four to five times when compared to standard metallurgy, according to Clextral. From a processor's standpoint, this development offers multiple advantages: reduced downtime for component replacement; fewer dollars spent on replacement screws, barrels and barrel liners; and long-term consistency in product quality. Metallurgy is used for tips of flights on screws or 100% monoblock construction as well as on monoblock barrels and barrel liners.

Clextral employs HIP (hot isostatic pressure) and HIC (hot isostatic

**Powder metallurgy is a method that allows for an effective marriage of strength and hardness.**



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compression) procedures that allow multi-materials to be manufactured in a homogeneous method using varied compositions. This new metallurgy significantly outperforms standard materials due to its high densification, the company says. This is a response to thermal, chemical and mechanical

stresses that are the typical causes of screw and barrel damage in the high work zones of twin screw extruders.

Powder metallurgy is a method that allows for an effective marriage of strength and hardness. Numerous distinctions are possible in the form of powders, and several processes are ca-

pable of simultaneously making them denser to obtain a screw or barrel blank with a high quality interface. High density compression along with a sintering operation to obtain the metallurgy, a new laser fusion technique and the HIP process makes the two powder layers denser and allows sintering.

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## Homogenizing screw elements improves mixing and is very effective for use in high meat recipes and those high in internal fat.

This process consists of:

- Packaging powders and eventual nodes in capsules;
- Turning the capsule into a vacuum;
- A simultaneous compression and sintering stage using a pressure oven and a maximum temperature of 2,000°C;
- A blank extraction by machining the capsule and eventual nodes.

According to Cleextral research, reducing wear and surface degradation often associated with an unchecked loss of material is key to reducing energy losses. Replacing mechanical parts means new manufactured parts and maintenance, creating additional energy consumption and financial losses. Increasing reliability and the operating life of mechanisms limits replacements and guarantees system safety. ●

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# New US federal law to affect petfoods

**W**e are beginning to see results of the US congressional inquiries made last spring on the petfood recalls. In fact, both houses of Congress have proposed a host of new legislation in recent months, all related to food safety, imports and/or recall authority.

Most notable to date is the Food and Drug Administration Amendments Act of 2007 (FDAAA). It passed in both the US House of Representatives and the Senate by large majorities (I think unanimously by the latter) and was signed into law by President Bush in September.

Most of the FDAAA deals with various issues regarding drugs and medical devices; only a small portion actually pertains to food safety (approximately 10 out of 156 pages). Much of that food safety part applies to all foods under FDA jurisdiction, but it includes many specific references to petfoods. The complete document is available at [www.fda.gov/oc/initiatives/HR3580.pdf](http://www.fda.gov/oc/initiatives/HR3580.pdf).

**It puts the burden on FDA to improve and new responsibility on manufacturers.**

— David Dzanis



## Effects on FDA

The new law puts the burden on FDA to improve its capabilities when dealing with a food contamination incident. To help address some of the complaints about the agency during the recalls, FDA must establish an early warning and surveillance system to help identify adulteration of the petfood supply and outbreaks of illness associated with petfood. The law suggests emulating or coordinating efforts with warning systems already in place for human food and animal health. Congress has granted FDA only one year to put this system in place.

Another complaint was FDA's not

communicating facts about the petfood recalls in a timely manner to the public. The new act directs FDA to improve its ability to collect and compile pertinent information from companies, associations and other organizations and disseminate it quickly and effectively. This would include posting all information in a single, easily accessible location on the Internet with a searchable database, easy for the public to understand and use.

Other aspects of FDAAA include coordinating efforts with state authorities on food safety issues and establishing a reportable food registry within the next year. Further, within two years, FDA must promulgate new regulations establishing petfood ingredient standards and definitions, processing standards and updated labeling standards that include nutritional and ingredient information.

## Effects on industry

Under the current Bioterrorism Act, all food facilities (including animal feed and petfood facilities) must be registered with FDA. However, except for some record-keeping and the requirement for companies to provide the agency with information on its facilities in case of an emergency, the burden this places on the industry is arguably little.

But under the reportable food registry

## Key elements of FDAAA

### FDA must:

- Establish an early warning and surveillance system to help identify adulteration of the petfood supply;
- Improve its ability to collect and compile pertinent information and disseminate it quickly and effectively;
- Coordinate efforts with state authorities on food safety issues;
- Establish a reportable food registry;
- Develop new regulations establishing petfood ingredient standards and definitions, processing standards and updated labeling standards.

### Industry must:

- Report to FDA within 24 hours any instance with a reasonable probability of causing serious health consequences or death;
- Investigate the cause within this 24-hour period if the adulteration of the food may have originated internally;
- Maintain records on any incidents for two years;
- Make those records available to FDA inspectors.



as part of the new FDAAA, companies must report to FDA, within 24 hours of discovery, any instance involving a food where “there is a reasonable probability that the use of, or exposure to, such article of food will cause serious adverse health consequences or death to humans or animals.” Also, the facility must investigate the cause of the adulteration within this 24-hour period if the adulteration may have originated internally.

The only exception to the reporting requirement is when the adulteration originated in the facility, was detected before any of the product was shipped out and was corrected or the product was destroyed. Facilities must maintain records on these incidents for two years. The records must be made available to FDA inspectors and could be subject to release to the public under the Freedom of Information Act. This puts a tremendous new responsibility on petfood manufacturers.

The new regulations pertaining to ingredient, processing and labeling standards will also likely impose additional burdens on the petfood industry, but it is not yet known what they might be. FDA is directed to consult with AAFCO and other stakeholders, including petfood manufacturers and veterinary medical associations, as the rules are developed.

### What’s not affected

Though the safety of imported food was identified as a driving force behind this legislation, the act mentions little about food importation. It has new directions to FDA regarding inspection of imported seafood and aquaculture products, and these new regulations and systems will certainly impact imported as well as domestic products. However, there’s no mention of increased inspection of all food imports or new import fees.

Also, there’s no mention of increasing FDA authority with regard to initiation of recalls under FDAAA. At this time, recalls of adulterated products are tech-

nically all voluntary, although with one exception I don’t remember an instance where a company fought FDA’s “suggestion” to initiate a recall. Still, this was seen by some in the US Congress as a great deficiency in existing law, and I expect we may see further legislation to grant FDA mandatory recall authority. ●

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

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## Help for food sensitivities?

**A**dverse food reactions and food intolerances, hypersensitivities and allergies are popular topics of discussion among pet owners and may affect 8-10% of our pets. These topics also constitute a large portion of the feedback to manufacturers' customer service lines. Complaints can range from vomiting and diarrhea to ear infections to skin and coat problems such as "hot spots," lesions, inflammation, reddening and chewing on feet and legs.

These problems are hard to ignore because they are so dramatic, uncomfortable and messy and strike at the very core of pet ownership by becoming a barrier to direct interaction. The problems may be linked by a common thread: the overreaction of the immune system to a dietary component, most probably a protein. The ultimate solution may depend on hydrolysis of proteins to render them hypoallergenic.

### Battleship cells in action

True allergies to foods are the result of an antigen eliciting an immunoglobulin E (IgE) mediated response. In this stimulation of the immune system, an offending (antigenic) protein is thought to bridge, or crosslink, primed IgE receptors on the mast cell, a specialized "battleship" cell of the immune system. The formation of this crosslink causes the mast cell to degranulate, releasing chemicals such as histamines, cytokines, prostaglandins and enzymes into the circulation. Their job is to destroy the offending antigen and shore up the defenses at the tissue level—to repel and expel the invaders via vomiting, sneezing, swelling, etc.

The initial treatment for these re-

## Are hydrolyzed proteins the solution to food-related immune system problems?

— Greg Aldrich



actions falls to modern pharmacology to blunt the immune response with compounds such as antihistamines and corticosteroids. These are short-term solutions with numerous side effects. The longer term solution focuses on eliminating the offending agent that has sensitized the animal's immune system.

One approach is to simply avoid the antigenic protein. With pets, so-called elimination diets have been somewhat successful. To really do it right, there is a multi-month routine of removing suspected proteins and then verification by replacing them in the diet. This regime can be challenging for pet owners, so compliance is iffy. Diets containing "novel" proteins are commercially available and often serve as a shortcut to the elimination regime. However, the efficacy of these diets is well below 100%.

### Busting up the protein

Another technique first developed for human infants with milk hypersen-

sitivities attempts to render the antigenic protein ineffective (hypoallergenic). For some proteins, this can be done by heat processing and for others through ultrafiltration. The most successful approach has been to enzymatically hydrolyze the protein down to the peptide level. In other words, bust the protein into smaller pieces.

Then why not just use crystalline amino acids? They are expensive and challenging to manage: They are hygroscopic, diet acceptability (palatability) can be poor and they can lead to problems of intestinal osmotic balance, causing diarrhea. So modification of the protein is preferable.

To be effective, the hydrolysis of the protein must decrease its size to such a point that it can no longer form the crosslink between the primed receptors on the mast cell—no bridge, no immune reaction. The reduction in size is thought to be near the peptide range (two or more amino acids).

A popular range cited is less than 10-12 kD or kilodaltons. But some research indicates the size can be as high as 70 kD; at the other extreme are indications that some proteins need to be less than 1-2 kD. A kD is the weight of a thousand hydrogen atoms, or 1.65 x 10<sup>-21</sup> grams (pretty small). Thus, pro-

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teins that can be as large as 100,000 kD must be thoroughly demolished to evade detection by the immune system while still remaining palatable and delivering essential amino acids.

### Hydrolysis how-to

In practice, the production of hydrolyzed proteins is similar to making a flavor digest. A specific blend of enzymes is added to the target ingredient (e.g., chicken, soy) and the pH is adjusted to an optimal level. The mix is heated in a reaction vessel until the desired hydrolysis is achieved and then stopped—either through chemical or thermal means (too much hydrolysis can lead to bitterness and thus palatability issues). The liquefied hydrolysate may be filtered and then spray or drum-dried.

Once the hydrolysis is complete, verification that the proteins have been sufficiently hydrolyzed is essential. It must be assured that the protein (now hopefully peptides) does not exceed the previously determined size threshold. This is often done by lab techniques known as size-exclusion gel-electrophoresis or modifications to generally accepted chromatography techniques.

Testing via measurement of antigenicity against established antibodies and animal validation—such as skin-prick tests and cross-reaction with sera IgE of sensitized animals—may be necessary to ensure the final outcome remains consistent over time. The exact nature of the enzyme cocktail, reagents, reaction times, process parameters and analytical techniques are fiercely protected by the manufacturers of these ingredients, and rightly so, since development takes a substantial investment in time and resources.

### Sold through veterinarians

Diets based on these hypoallergenic hydrolyzed proteins are almost exclusively sold through veterinarians. In these diets, extruded or canned, hydrolyzed proteins may exceed 50% of the mix. So, it is important that they be well accepted by the animal

and be easy to work with for the pet-food manufacturer. This has not been a problem since hydrolyzed proteins

**The problems may be linked by a common thread: the overreaction of the immune system to a dietary component.**

generally retain good palatability for dogs and cats.

Hydrolyzed proteins can also be very functional ingredients providing binding, gelation and structure to the finished products. Protein sources that have been evaluated or used in pet diets include casein, whey, soybean, chicken and chicken liver.

The general principal behind hydrolysis of proteins is fairly simple in theory, but practical execution from hydrolysis to incorporation into pet diets can be challenging and expensive. However, these diets have proven effective at providing quality nutrition while flying under the immune system's radar. ●

*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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# All I want for Christmas is a treat

**I**t's no secret that America has a love affair with pets. Pet owners treat their household pets like children. In fact, more than one-half of pet owners in the US report buying gifts for their pets, according to the American Pet Products Manufacturers Association's (APPPMA) 2007-2008 *Pet Owners Survey*.

The year-end holiday season is the most frequent gift-giving occasion for US pet owners, with this breakdown:

➤ 57% of dog owners report giving their dogs gifts for Christmas or Hanukkah, spending an average of

**More than one-half of US pet owners report buying gifts for their pets.**

— Huntley Manhertz, Jr.



US\$10 per gift;  
➤ 42% of cat owners say they give kitty gifts at this time, spending an average of US\$11;  
➤ 32% of small animals owners report

giving their pets gifts at this time and spend an average of US\$12; and  
➤ 27% of bird owners say they give their feathered friends holiday gifts, spending an average of US\$13.

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One of the most popular types of pet gifts is treats, says the survey. As many as 90% of US dogs receive treats, followed by 82% of birds, 79% of small animals and 69% of cats. On average, dog owners spend US\$66 per year on treats.

## Pet ownership growing

In terms of ownership, 63% of US households own at least one pet, according to the APPMA survey. This percentage has remained steady in recent years; the number of pet-owning households has grown at the same rate—2.8%—as the number of overall US households.

Many in the US own more than one pet, with 46% of dog owners reporting they also own a cat and 40% of cat owners reporting they also own a dog. While dogs and cats are by far the most popular types of US pets, freshwater fish, birds, reptiles and small animals have steady rates of ownership. (See Figure 1 for how pet ownership breaks down in the US.)

## Specially formulated

The APPMA survey uncovers other interesting trends. For example, 64% of US dog owners and 58% of US cat owners report feeding their pets specially formulated foods. For dogs, the most frequently fed type of food is one formulated for middle-aged pets, at 16%, followed by one formulated to maintain a healthy coat (14%), one formulated for senior pets (12%) and foods formulated for puppies or weight control (both at 10%).

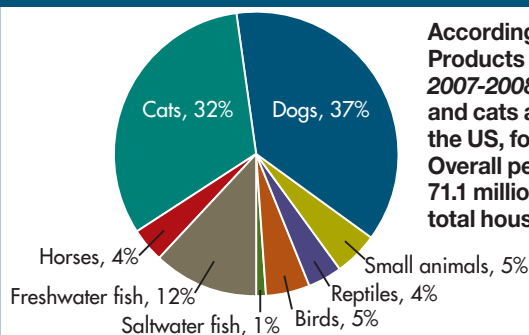
US cats are most likely to eat foods specially formulated for kittens (55%), followed by ones formulated to manage hairballs (34%), foods for indoor pets (20%) and foods for senior pets (13%). ●

*Dr. Huntley Manhertz Jr. is a CPG market researcher and an independent writer. He can be reached at Tel: +1.813.699.4682, hmanhertz@yahoo.com.*

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**Figure 1: Percentage of US pet ownership by type**



According to the American Pet Products Manufacturers Association's 2007-2008 Pet Owners Survey, dogs and cats are the most popular pets in the US, followed by freshwater fish. Overall pet ownership has grown to 71.1 million US households, or 63% of total households.



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# Research Notes

## Control of fat: lean body composition

Immune and inflammatory factors are linked to the control of fat:lean body composition, according to an increasing body of literature. Recent progress in understanding the control of body composition has been made through identification of inflammatory cytokines and other factors produced by adipose tissue that affect body composition, often by direct effects on skeletal muscle tissue.

Adipose-derived factors such as leptin, tumor necrosis factor-alpha, resistin and adiponectin have been shown to affect muscle metabolism and/or protein dynamics by direct actions. This paper summarizes recent results that support the existence of a reciprocal muscle-to-fat signaling pathway

### Key Concepts

#### ► Control of fat:lean body composition

(Quinn, 2007): Several studies support the model that muscle-derived interleukin-15 can decrease fat deposition.

#### ► New feline obesity findings

(Hickman, 2007): Obesity is now recognized as an inflammatory condition that leads to substances being secreted that can directly lead to diabetes mellitus and osteoarthritis.

#### ► Chicory fructans contribute to well-being

(Loo, 2007): Prebiotic feeding contributes to performance of livestock and to animal well-being—mainly pets but also livestock.

#### ► Arginine boosts immunity

(Popovic, 2007): Considerable controversy exists as to the benefits of dietary arginine, but emerging knowledge promises to clear this controversy and allow for arginine's safe use.

involving release of the cytokine interleukin-15 (IL-15) from muscle tissue.

Cell culture studies, short-term *in*

*vivo* studies and human genotype association studies all support the model that muscle-derived IL-15 can decrease fat deposition and adipocyte metabolism via a muscle-to-fat endocrine pathway. Fat:lean body composition is an important factor determining the efficiency of meat production, as well as the fat content of meat products. Modulation of the IL-15 signaling axis may be a novel mechanism to impact body composition in meat animal production.

**Source:** L.S. Quinn, 2007. *J. Anim. Sci.* 0458v1.

## New feline obesity findings

While obesity was once considered merely an aesthetic issue, or perhaps a contribution to lameness through increased weight-bearing, it is now recognized as an inflammatory condition. Dr. Anne Hickman, DVM, PhD, DACVN, discussed advances in knowledge about the endocrine function of obese adipose tissue. Hormones and inflammatory cytokines released from the adipose tissue are collectively known as adipokines. According to Dr. Hickman, "Adipokines play important and diverse role in multiple facets of normal metabolism and

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physiology. Adipokines can become dysregulated in obesity and may have direct causal links to many of the associated abnormalities.” Thus, these hormones and other substances secreted from body fat tissue can directly contribute to diseases associated with obesity, such as diabetes mellitus and osteoarthritis.

**Source:** A. Hickman, 2007. 13th Nestlé Purina Nutrition Forum, St. Louis, Missouri, USA.

## Chicory fructans contribute to well-being

The mammalian intestinal tract is a nutrient-rich environment because it often lacks enzymes necessary to degrade certain food components. However, certain intestinal bacteria are useful for further metabolism of nutrients. Intestinal flora coevolved with its host and the selection was driven by the intestinal architecture (morphology and transit scheme) and dietary habits of the host. Different animal species have different typical profiles of intestinal bacterial populations.

Animals in general seem not to be able to hydrolyze beta-glycoside bonds, such as the chicory inulin beta-(2-1) bond. Chicory fructans were shown to be prebiotic, selectively interacting with intestinal bacterial ecosystem, in humans and in animals, including livestock and pets. This article describes how prebiotic feeding contributes to performance of livestock (pig, calf, horse, broiler, laying hen and fish) and to animal well-being—mainly pets but also livestock.

**Source:** J. Van Loo, 2007. *J. Nutr.* 137:2594S-2597S.

## Arginine boosts immunity

For many years, dietary arginine supplementation has been used as a mechanism to boost the immune system. Considerable controversy, however, exists as to the benefits and indications of dietary arginine due in part to a poor understanding of the role played by this amino acid in maintaining immune function. Emerging knowledge promises to clear this controversy and allow for arginine's safe use.

In myeloid cells, arginine is mainly metabolized either by inducible nitric oxide (NO) synthases (iNOS) or by arginase 1, enzymes that are stimulated by T-helper 1 or 2 cytokines, respectively. Myeloid suppressor cells (MSC) expressing arginase have been described in trauma, intra-abdominal sepsis, certain infections and cancer. Myeloid cells expressing arginase have been shown to accumulate in patients with cancer.

MSC efficiently deplete arginine and generate ornithine. Low circulating arginine has been documented in trauma and cancer, suggesting that MSC may exert a systemic effect and cause a state of arginine deficiency. Simultaneously, T lymphocytes depend on arginine for proliferation, zeta-chain peptide and T-cell receptor complex expression, and the development of memory. T-cells cocultured with MSC exhibit the molecular and functional effects associated with arginine deficiency.

**Source:** P.J. Popovic, et al, 2007. *J. Nutr.* 137:1681S-1686S.

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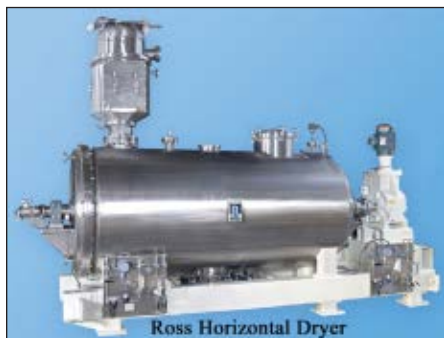


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# Product News



Ross Horizontal Dryer

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The Ross Horizontal Vacuum Dryer for drying specialty chemicals is available in sizes from 1 through 500 cubic feet. Features include stainless steel construction, internal surfaces polished to a 240 grit finish, full vacuum to 25 psig operation, 185 psig dimpled

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## TFT bag sealer from Doboy

Doboy Inc., a division of Bosch Packaging Technology, has introduced the TFT Bag Sealer for woven polypropylene bags. The TFT Sealer trims, folds and tapes woven polypropylene bagging material to provide a sturdy, durable seal, yet is easy to open, according to the company. The double fold tape is resistant to both hot and cold temperatures, and the sealing method provides a sift-proof closure



to prevent leakage during shipping and storage.

The TFT comes equipped with a standard Allen-Bradley programmable logic controller (PLC) and human-machine-interface (HMI) touch screen. With a high speed of 150 feet per minute, the TFT unit is suited for automatic feeding and is easily inte-

# The events you need to visit



## EXHIBITIONS & CONFERENCES

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### X-ray technology presentation online

According to Mettler-Toledo Safeline, processors and packagers in the petfood industry face certain challenges, including detecting contaminants, detecting damaged or missing products and identifying overfill and

underfill. A presentation about x-ray technology and how it addresses these concerns is available for download at [www.mt.com/xraytechnology](http://www.mt.com/xraytechnology).

The presentation, entitled "X-ray Inspection—The Future of Packaging Inspection," explains the technology and its specific application to the pet-

food industry. This presentation shows that x-ray provides capabilities not available in metal detectors or vision systems.

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## 2007

► **PFIAA Technical Seminar and Annual Dinner**, December 3, 2007, The RACV City Club, 501 Bourke St., Melbourne, Victoria, Australia. Contact: John Aird, executive manager, Pet Food Industry Association of Australia (PFIAA), Tel: +61.3.9722.1857, info@pfiia.com.au, www.pfiia.com.au.

## 2008

► **North American Veterinary Conference (NAVC)**, January 19-23, 2008, Orlando, Florida, USA. Contact: NAVC, Tel: +1.352.375.5672, Fax: +1.352.375.4145, info@tnavc.org, www.tnavc.org.

► **Conference on Pet Food Ingredient Quality**, January 22-23, 2008, Georgia World Conference Center, Atlanta, Georgia, USA. Contact: Jarrod Kersey, American Feed Industry Association, jkersey@afia.org, John Starkey, Poultry Protein & Fat Council, jstarkey@poultryegg.org, www.petfoodconference.com.

► **International Poultry and Feed Expo**, January 23-25, 2008, Georgia World Congress Center, Atlanta, Georgia, USA. Tel: +1.770.493.9401, www.ipe08.org.

► **PETS International Global PETS Forum**, January 24-25, 2008, Grand Hotel Kempinski, 19 quai de Mont-Blanc, 1211 Geneva, Switzerland. Contact: Corine van Winden Tel: +31.33.4225833, Fax: +31.33.4225838, corine@pets.nl, www.petsinfo.net.

► **18th Annual Practical Short Course on Feeds and Pet-food Extrusion**, January 27-February 1, 2008, Food Protein R&D Center, Texas A&M University, College Station, Texas, USA. Contact: Dr. Mian N. Riaz, Tel: +979.845.2774, Fax: +979.458.0019, mriaz@tamu.edu, www.tamu.edu/extrusion.

► **13th International Industrial Trade Fair**, Cereals, Mixed Feed and Veterinary, February 5-8, 2008, All-Russia Exhibition Centre, Moscow, Russia. Contact: Alexandra Zharko, Tel: +7.495.956.41.52, Fax: +7.495.730.19.32, garko@intourist.ru, www.intourist.ru.

► **Global Pet Expo**, February 14-16, 2008, San Diego Convention Center, San Diego, California, USA. Contact: American Pet Products

Manufacturers Association (APPMA), Tel: +1.203.532.0000, Fax: +1.203.532.0551, www.globalpetexpo.org.

► **India International Pet Trade Fair**, February 29-March 2, 2008, National Small Industries Corporation (NSIC) Expo Complex, Okhla Industrial Estate, New Delhi, India. Contact: Binoy Sahee, Tel: +91.989.101.3797, www.iiptf.com.

► **Petfood Forum Asia**, March 5, 2008, Queen Sirikit National Convention Center, Bangkok, Thailand. Contact: Nancy Grossnickle, Watt Publishing Co., Tel: +1.815.734.5674, ngrossnickle@wattnet.net, www.petfoodindustry.com.

► **Victam Asia**, March 5-7, 2008, Queen Sirikit National Convention Center, Bangkok, Thailand. Contact: Henk van de Bunt, Victam International, Tel: +31.33.246.4404, Fax: +31.33.246.4706, expo@victam.com, www.victam.com.

► **Aquafeed Horizons Asia**, March 6, 2008, Queen Sirikit National Convention Center, Bangkok, Thailand. Contact: Suzi Fraser Dominy, Tel: +1.808.732.7499, conferences@aquafeed.com, www.aquafeed.info.

► **Petfood Forum**, April 14-16, 2008, Hyatt Regency O'Hare Hotel, Chicago, Illinois, USA. Contact: Nancy Grossnickle, Watt Publishing Co., Tel: +1.815.734.5674, ngrossnickle@wattnet.net, www.petfoodindustry.com.

► **Petfood Focus on Safety**, April 16-17, 2008, Hyatt Regency O'Hare Hotel, Chicago, Illinois, USA. Contact: Nancy Grossnickle, Watt Publishing Co., Tel: +1.815.734.5674, ngrossnickle@wattnet.net, www.petfoodindustry.com.

► **Alltech's International Feed Industry Symposium**, April 20-23, 2008, Lexington, Kentucky, USA. Contact: Alltech, symposium@alltech.com, www.alltech.com.

For a complete list of 2007 events, visit **Petfood Industry Online** at [www.petfoodindustry.com](http://www.petfoodindustry.com)


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## It's the safety, stupid

**D**uring the 1992 US presidential elections, Bill Clinton famously (or infamously) based his campaign on the slogan, "It's the economy, stupid." His point was that with the US weathering a serious recession, the one issue voters cared most about was the economy.

Now, in 2007, the US is once again engrossed in a presidential race. But for the petfood industry—and I would argue not just in the US, but throughout the world—one issue has trumped all others this year: product safety. And that has repercussions for all food products consumed around the globe.

### Connecting elements

"I personally think you can't separate the petfood industry as it relates to the recalls from the human food industry and things like BSE and *E. coli*," says Todd Hall, president of Cargill Animal Nutrition. "I believe people want to be increasingly aware of where their food originates and how it's handled, how it's processed and the story that goes along with it. I don't believe in the long run that pet owners are going to be any different."

Hall shared his thoughts during an interview for the cover article of this issue (p. 18). He referred to a safety program, Feed for Food, that Cargill has had in place since 2003. Key elements of the system include annual food safety training for all Cargill employees, certified ingredient suppliers, emergency recall and bio-security procedures,

**For the petfood industry, one issue has trumped all others this year.**

— Debbie Phillips-Donaldson



a traceability system and certified HACCP process control of feed plants. (Hall says all but about 10 of 170 Cargill Animal Nutrition plants worldwide are certified, with the rest happening soon.) What makes the system unique, the company says, is how these separate elements are connected via a complex, technology-based service.

### Intensifying measures

Cargill intensified its safety measures in the wake of the US petfood recalls earlier this year, even though none of its products were involved. It's certainly not the only company that has made changes. Nutro Products Inc., which did have several products recalled, added feeding trials on all products to its safety protocols; previously it had done feeding trials only on dry petfoods. (See [www.nutroproducts.com/pdf/quality.pdf](http://www.nutroproducts.com/pdf/quality.pdf).)

Of course, Cargill and Nutro are both large, US\$ multimillion or even multibillion corporations with seemingly unlimited resources. But even smaller manufacturers have stepped up their safety and testing protocols.

In October, Natural Balance Pet Foods Inc., which also had products recalled, announced its Consumer Buy With Confidence program. It allows a pet owner to enter the date code on any Natural Balance product into an online

database, which will then display the testing results for the specific batch of that product (see p. 8). The company says it has invested more than US\$1 million in the program.

### Mandate for safety

Soon, manufacturers marketing their petfoods in the US will have little choice when it comes to improved product safety. New laws are being passed or developed all the time; for example, see p. 36 for Dave Dzanis' report on the Food and Drug Administration (FDA) Amendments Act of 2007, passed in September. In November, President Bush's Interagency Working Group on Import Safety issued its report calling for, among other recommendations, the FDA to be given stronger recall authority.

But it's not just the mandate of law that's forcing petfood companies to focus on safety; it's the mandate of consumers, too. No matter a company's size or resources, it will soon find that it can't afford not to guarantee the safety of its products. That's the one issue pet owners now care most about. ●

---

*Phillips-Donaldson is editor-in-chief of Petfood Industry magazine. E-mail her at [dphillips@wattnet.net](mailto:dphillips@wattnet.net).*

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But, the unparalleled performance, versatility and cost-savings potential of Wenger's petfood systems are tremendously appealing to manufacturers and processors worldwide. Product shapes, texture, density and palatability can all be maintained within the strictest quality control limits.

Our extruders feature on-line control of mechanical energy to meet specific target density or texture. And via Wenger's

new Waste Recycling System, any wet, under-processed product from system startup can be totally recycled for improved plant efficiency.

As the world's longtime leader in petfood production, Wenger is uniquely positioned to give you the tools you need to succeed – whether you already know which tools you want or you need our process expertise to guide you.

Put a Wenger system to work in your operation and discover the type of quality and performance that pets around the world will always appreciate.

