

June 2008

# Petfood Industry

WATT

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## Functional treats take off

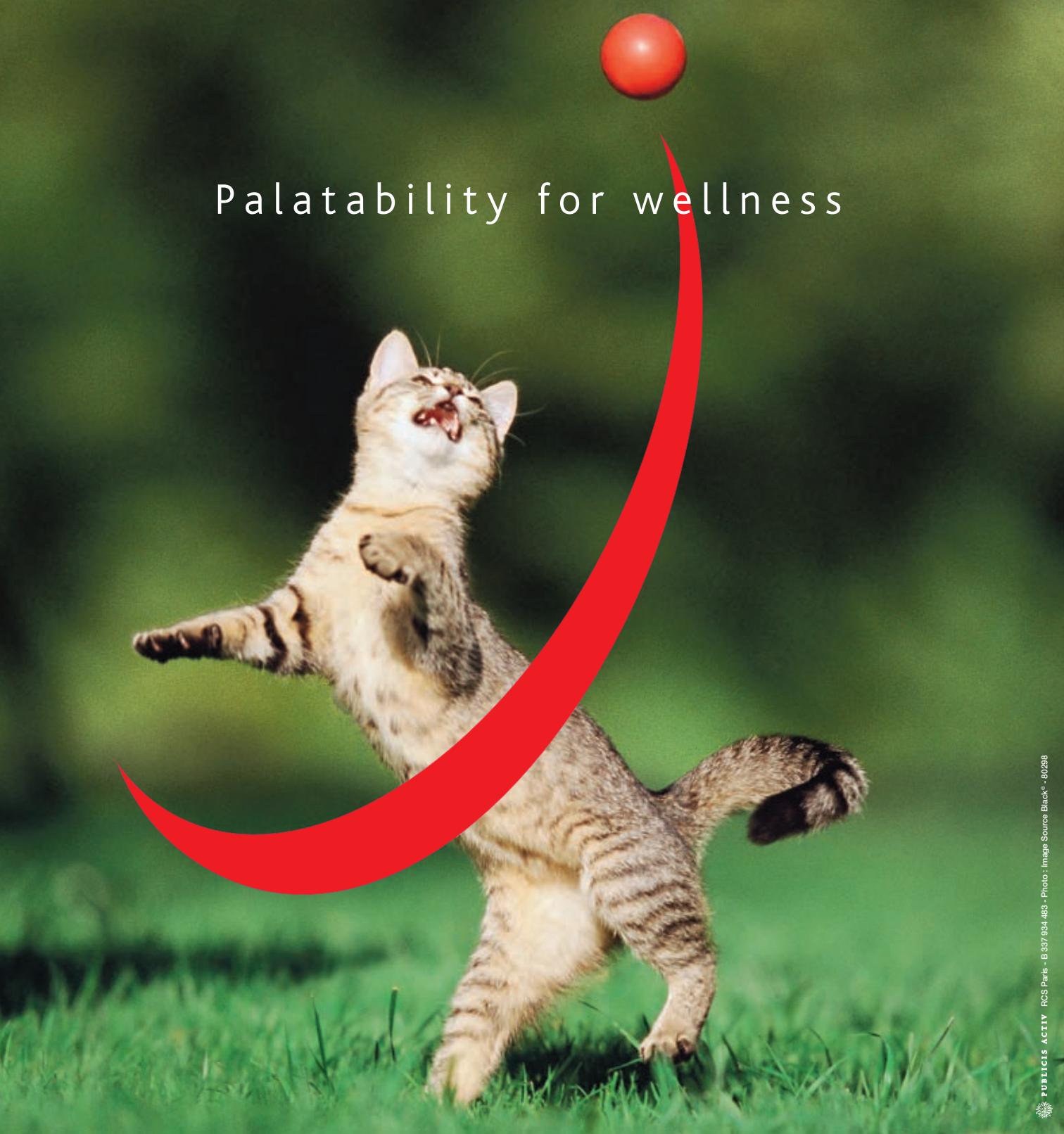
Thriving Dogswell keeps coming up with new products, p. 20

Biofuel-petfood connection

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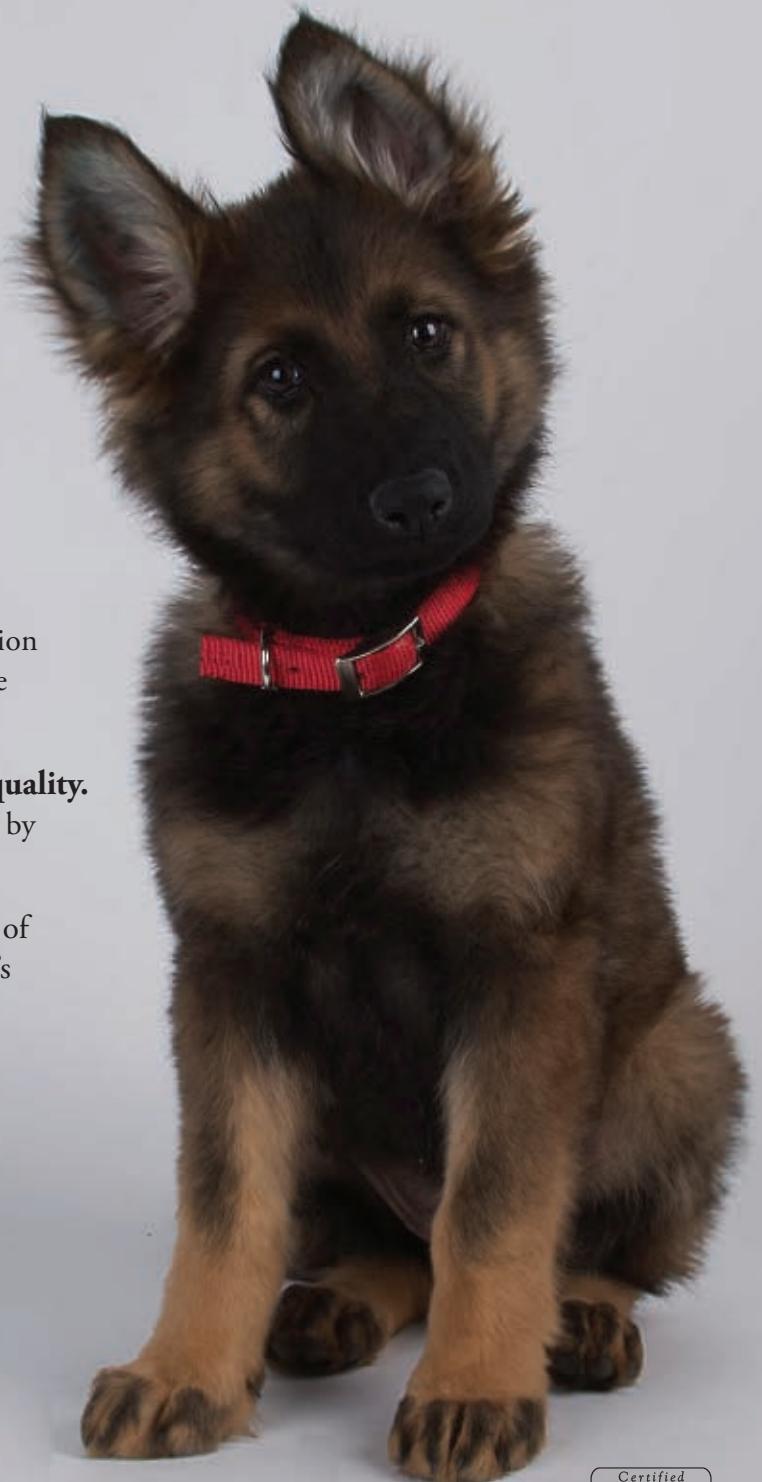
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**On the cover:** Over the past three years, Dogswell's growth has been in the triple digits.

Graph image by Stephan Sweet, BigStockPhoto.

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## Featured this month



### 1. New technologies in process control

See video from the Thermo Fisher Scientific booth at Petfood Forum 2008.

<http://www.petfoodindustry.com/0806PETprocess.aspx>

### 2. Biofuels and petfood—TV interview

Watch co-owner Shelly Gunton of Castor & Pollux Pet Works discuss rising petfood costs.

<http://www.kgw.com/video/business-index.html?nvid=240884>



### 3. Advice on purchasing practices

Read Dr. David Rosenblatt's tips for good purchasing practices.

[www.petfoodindustry.com/0806PETpurchase.aspx](http://www.petfoodindustry.com/0806PETpurchase.aspx)



**Bruce Plantz**, Vice President, Director of Content  
[bplantz@wattnet.net](mailto:bplantz@wattnet.net)

#### EDITORIAL STAFF

**Debbie Phillips-Donaldson**, Editor-in-Chief  
[dphillips@wattnet.net](mailto:dphillips@wattnet.net)

**Tim Phillips**, DVM, Editor  
[tphillips@wattnet.net](mailto:tphillips@wattnet.net)

**Jessica Taylor Bond**, Associate Editor  
[jbond@wattnet.net](mailto:jbond@wattnet.net)

**Eric Eyberger**, Associate Editor  
[eyberger@wattnet.net](mailto:eyberger@wattnet.net)

**Jim Riedl**, Art Director

#### EDITORIAL & SALES OFFICE

**PETFOOD INDUSTRY**, 303 N. Main St., Ste. 500,  
Rockford, Illinois 61101-1018 USA. Tel: +1.815.734.4171,  
Fax: 1.815.734.5649 (Editorial), 1.815.968.0941 (Sales).

**Steve Akins**, VP/Publisher  
[sakins@wattnet.net](mailto:sakins@wattnet.net)  
Tel: +1.919.387.7961, Mobile: +1.815.209.6444

#### USA ADVERTISING SALES

**Michelle Adams**, Sales Manager  
[madams@wattnet.net](mailto:madams@wattnet.net), Tel: +1.815.734.5603

**Ginny Stadel**, Sales Associate  
[gstadel@wattnet.net](mailto:gstadel@wattnet.net), Tel: +1.815.734.5691

#### INTERNATIONAL ADVERTISING SALES

**Tineke van Spanje**, European Regional Sales Manager  
[spanje@xs4all.nl](mailto:spanje@xs4all.nl)  
Tel: +31.495.526155, Fax: +31.495.525126

**Ding Ding Li** (China only)  
[Dingdingli@vip.163.com](mailto:Dingdingli@vip.163.com)  
Tel: +86.21.64474625

#### PUBLISHING SERVICES

**James Wessel**, Circulation Director  
For subscriptions, address changes, past copies—  
[jwessel@wattnet.net](mailto:jwessel@wattnet.net)

**Robert Portillo**, Production Manager  
For advertising material, deadlines and processing—  
[rportillo@wattnet.net](mailto:rportillo@wattnet.net)

#### ADMINISTRATIVE STAFF

**Leslie A. Watt**, Chairman Emeritus

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**Tim Smith**, COO, VP Finance, Corp. Secretary/Treasurer

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and Development

#### SUBSCRIPTION INQUIRIES/ CHANGE OF ADDRESS

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## Finding the best suppliers

“**T**he question is not whether you’ve had ISO training,” says Dr. David Rosenblatt, managing director of PDCA Training Solutions, “but whether you know how to do your job effectively. Some people learn very little in training.” He was speaking at Petfood Focus on Safety 2008 about good purchasing practices. It’s a timely topic since some in our industry have recently realized the harsh consequences of not knowing enough about their suppliers.

### The top priority

Of the many parameters affecting the selection of suppliers, safety must be top priority, states Rosenblatt. Issues

### External certifications

When considering a supplier, preference should be given to those that are externally certified. External certifications include, but are not limited to:

- ISO 22000—food safety management system;
- HACCP (various certification schemes);
- BRC—British Retailers Consortium Global Food Safety Standard;
- BRC-loP—British Retailers Consortium and the Institute of Packing standard for packaging material manufacturers;
- IFS—International Food Standard, written by German and French retailers;
- SQF 1000 for primary producers and SQF 2000 for manufacturers; and
- GlobalGAP—Good Agricultural Practices.

**By failing to prepare you are preparing to fail.**

— Tim Phillips



of price and availability should not even be considered if the supplier has not been cleared by the food safety team. The following practices should be followed.

**Auditing is a must.** Authorization of a supplier should always follow at least one supplier audit. An organization can compile its own audit criteria or use existing audit programs. Audits should only be carried out by trained and skilled auditors. If the purchasing organization does not have a qualified person, then a professional auditor can be hired. In these cases it is recommended that somebody from the food safety team join the audit.

**Score annually.** Each supplier should be evaluated at least annually and preferably scored. The score should include sub-scores for various purchasing parameters, each weighted according to its importance. Audit results and safety performance should have a substantial contribution to the score. The score should determine the class of the supplier: A, B, C, etc. New suppliers should always be given a special class until they have proven themselves.

**External certification best.** Preference should be given to externally certified suppliers (see sidebar). Always make sure that the certificate is current. Certification can be revoked; therefore it is good practice to periodically review the status, preferably online.

**Authorize the manufacturer.** Always authorize the manufacturer. In our industry there are many brokers, reps and agents. A food safety audit should be carried out at the manufacturer’s premises, even if you aren’t purchasing directly from the company.

**Auditing frequency.** The frequency and extent of supplier audits should be planned based on two inputs: the supplier’s past performance and the risk associated with the product being purchased. The risk of the product being purchased comes from your HACCP analysis.

### Serious about safety

It has been said that those who fail to prepare, should prepare to fail. Establishing, implementing and maintaining good purchasing practices will contribute to product safety as long as these practices are determined based on HACCP and as long as our suppliers understand that we are serious about petfood safety. ●

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

#### Online extra!

Go to [www.petfoodindustry.com/0806PETpurchase.aspx](http://www.petfoodindustry.com/0806PETpurchase.aspx) for a Word file of Dr. Rosenblatt’s entire presentation.

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## Quick hits

- ▶ Linky UK will now distribute Forza 10 petfood from Sany-pet in the United Kingdom.
- ▶ Natura's new website, [www.naturavet.com](http://www.naturavet.com), is a source for veterinary students and practitioners.
- ▶ Planet Dog welcomes Kurt Feeley as the e-commerce manager and Jessica-Star Benedict as a customer service representative.
- ▶ WellGen Inc. has named Dr. Nancy E. Rawson, PhD, chief scientific officer.
- ▶ Greg Alles has been appointed president of Bliss Industries LLC.
- ▶ Food Safety Net Services has opened its newly expanded laboratory in San Antonio, Texas, USA.
- ▶ Procter & Gamble International Operations S.A. has reached a distribution agreement with Nash & Nunki AG to develop marketing for Iams products in Germany.

## SPF North America opens new facility

SPF North America, a supplier of palatability solutions to the international petfood industry, has recently extended its industrial network. The company's newest campus, located in Greenwood, South Carolina, USA, includes an efficient palatability enhancer manufacturing facility equipped with liquid production technologies and advanced drying processes, including microgranulation technology. The campus will also soon house the North American division of the company's research center with an increased staff of scientists and a Panelis palatability test center. The green facility was built to or above USDA-APHIS regulations, and was designed to help preserve and

respect the natural environment, according to SPF. The SPF North America headquarters and production facility is located at 5300 Highway 25 N, Hodges, SC, USA 29653.



SPF North America's new facility in South Carolina, USA.



## Report links 2006 *Salmonella* infections to dry dog food

The US Centers for Disease Control and Prevention (CDC) have revealed a strong link of *Salmonella* infection in humans to contaminated dry dog food, the first time such a link has been uncovered, according to US officials. Furthermore, *Salmonella* infections from dry dog food may be an under-recognized source of illness in people, especially young children, officials from the CDC said. "This is the first time human illness has been linked to dry dog food," said CDC epidemiologist Dr. Casey Barton Behravesh, who co-authored a report on the finding.

The CDC isn't sure how the *Salmonella* bacteria got into the dog food. "There are a number of possible ways that that could happen, and that's something we are still trying to figure out," Dr. Barton Behravesh said, adding that there have been previous cases of people contracting *Salmonella* infection from contaminated pet treats. The incidents of people becoming infected with *Salmonella* from dry dog food occurred in 2006 and 2007.

An estimated 70 people, mostly in the Northeast region of the US, were infected by dog food produced by Mars Petcare at its Pennsylvania, USA plant. About 40% of those infections involved infants, according to the report, published in the May 16, 2008, issue of the CDC's *Morbidity and Mortality Weekly Report*.

No deaths were reported, according to the report. No pets became ill. However, *Salmonella* was identified in feces samples from dogs that ate the dry food. In addition, *Salmonella* was found in open bags of the petfood fed to the dogs and in unopened bags of dog food made in the Pennsylvania, USA plant, the CDC said. Mars Petcare voluntarily recalled some bags of the two brands of food involved, but neither of the recalled brands was related to human illness.



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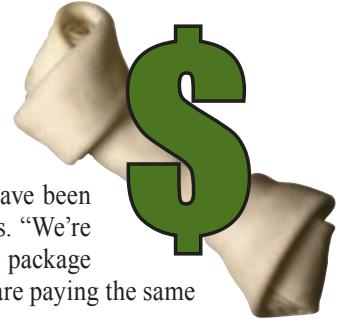
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## Petfood costs big bones as commodity prices rise

Retailers and manufacturers alike are hiking petfood prices, and the cost of kibble is only expected to climb even higher in the coming months. At PetSmart, for example, the cost of Hill's Science Diet dry dog food is up about US\$2 a bag, to US\$36 this year, says Michael Sapp, vice president of dog and cat consumables. Sapp also notes that other top-selling brands such as Pedigree, manufactured by Mars, and Purina, made by Nestlé, have been shrinking the size of their bags. "We're getting price increases and package downsizing," he said. "People are paying the same amount for less product."



The onward march of commodity prices is to blame for most of the price hikes on petfood. The price of key ingredients such as corn and rice, for example, are up some 30% in the past year. Petfood manufacturers say they have been able to offset much, but not all, of the commodity cost increases through the price hikes. "Like the entire food sector, we're seeing sharply escalating energy, transportation and ingredient costs," says Purina spokesman Keith Schopp.

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## INDUSTRY CALENDAR

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**AFIA Feed Industry Institute**, June 16-19, 2008, Crowne Plaza Chicago O'Hare, Rosemont, Illinois, USA. Contact: Judy Pilgrim, Tel: +1.703.524.0810, [afia@afia.org](mailto:afia@afia.org), [www.afia.org](http://www.afia.org).

**ZDS Pet Food and Nutrition Update**, June 25-26, 2008, ZDS, Solingen, Germany. Contact: ZDS Seminar Service, Tel: +49.0.212.5961.32, Fax: +49.0.212.5961.33, [schmidt@zds-solingen.de](mailto:schmidt@zds-solingen.de), [www.zds-solingen.de](http://www.zds-solingen.de).

**IFT Annual Meeting and Food Expo**, June 26-30, 2008, New Orleans, Louisiana, USA. Contact: Institute of Food Technologists, Tel: +1.312.782.8424, Fax: +1.312.782.0045, [info@ift.org](mailto:info@ift.org), [www.ift.org](http://www.ift.org).

### July

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**AVMA/AAAP Annual Convention**, July 19-23, 2008, New Orleans, Louisiana, USA. Contact: AVMA, Tel: +1.847.925.8070, Fax: +1.847.925.1329, [avmainfo@avma.org](mailto:avmainfo@avma.org), [www.avma.org](http://www.avma.org).

A complete listing of 2008 events is available at [www.PetfoodIndustry.com](http://www.PetfoodIndustry.com)

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# PETFOOD INDUSTRY GLOBAL

## India's growing petfood market driving up global food prices?

Speaking in Maryland, Missouri, USA, on May 2, 2008, US President George W. Bush said there was an increasing demand for food worldwide, which caused a spike in prices. He specifically targeted increasing food consumption in India.

Not only are Indians eating more and better, and driving up food prices, now their dogs and cats are doing the same. According to Euromonitor International, Indians spent US\$20 million on petfood in 2004—a figure that rose to US\$29 million in 2007. More members of India's middle class have pets, which might push up the prices of dog and cat food in the US. The worry factor could be that Indians are joining the race to buy packaged petfood.

According to the *Petfood Industry* and Packaged Facts report *Petfood 2011: The Global Outlook*, "Local operators forecast a growth rate of 25-35% per year for at least the next two years, with the most growth at the economy-end of the product-pricing spectrum as more mid-level consumers shift from homemade to prepared food."

## UK pet figures recently published

An annual report by the chairman of the Pet Food Manufacturers' Association (PFMA) in the UK said the national market had seen a 3% growth in sales in 2007 toward £1.7 billion (US\$3.3 billion), across the dog, cat and other small animal sectors. The prepared dog food market grew 1% in volume last year, but the increase in value was 4% to £912 million (US\$1.8 billion). Mixer products for dogs fell 5% to £28 million (US\$54.5 million). Treats for dogs rose 10% to £183 million (US\$356 million). The volume of cat food sold declined to 418,000 metric tons, but there was still a 3% growth in value terms to £742 million (US\$1.4 billion). Wet single and multi-serve cat foods each rose 10% in value terms in 2007, but dry food showed a value growth of only 1%. Treats for cats rose 14% to £14 million (US\$27.3 million). The small animal market was up 2% on volume and 6% on value to £56 million (US\$109 million).

## A new image for Zoomark International

As its promotional campaign starts, Zoomark International 2009 introduces itself to potential exhibitors and visitors with a new look to underline its evolution. More than a year before the show opens, many companies have already confirmed their interest in taking part in the event, which will be held May 7–10, 2009, in Bologna, Italy. The show organizers have also redesigned the show website [www.zoomark.it](http://www.zoomark.it) and added more up-to-date content. In the future, exhibitors will have the opportunity to present the promotions they have planned for Zoomark International directly on the website.

## Production plant for snacks and treats in the Netherlands

Petfood Innovators, a Dutch company specializing in the development and production of semi-moist, extruded and injection molded snacks and treats, has built a new production plant. With an investment of around €2.5 million (US\$3.9 million), a production facility of 5,000 square meters located in Holland has been installed with in-house developed production technology.

The processing lines include three single and three double specially designed extruders. Besides this production technique, a three collar cold extrusion line will produce multiple colored semi-moist products. A 268 ton injection molding machine is used to produce special shaped dental care and chewing products. All of Petfood Innovators products can be packed through four packaging lines.



## Take the *Petfood Industry* survey!

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## AVMA urges petfood makers to list calories

Future petfood labels that indicate the number of calories per serving could help obese animals shed extra pounds, the American Veterinary Medical Association (AVMA) has told the Food and Drug Administration (FDA). "Pet owners do not always know how much to feed. They may not realize the high number of calories associated with some of the petfood," said John Branam, testifying on behalf of the AVMA.



The FDA held the hearing last week as part of legislation last year requiring the Center for Veterinary Medicine (CVM) to establish petfood labeling standards in two years.

But Nancy Cook, vice president of the Pet Food Institute's technical and regulatory affairs, said calorie labels are unnecessary and won't prevent obesity in pets. Many petfood labels already contain serving sizes based on a pet's size. Calorie information can be obtained from food manufacturers, Cook also said.

But the AVMA said it's not the jobs of consumers and veterinarians to track down manufacturers for that information. A standard nutritional label that lists the number of calories per weight of food and per household items such as a can or a cup would help prevent owners from overfeeding their pets, the AVMA said.

## Menu Foods on the rebound

Menu Foods Income Fund says its business is on the way to recovering from the impact of last year's recalls, although on a smaller scale. The petfood maker said it lost an estimated US\$2.2 million or 10.8 cents per unit for the three months ended March 31, 2008, compared with a loss of US\$17.5 million or 91.8 cents per unit a year ago. Quarterly revenue was US\$55.6 million, down from US\$64.5 million.

Investors cheered the news. "We have made considerable progress and our prospects look better today than at any other time during this past year," president and chief executive Paul Henderson said in a statement. "As we move the business forward, we do so focusing on our core competency—the manufacture of high quality wet petfood. We will continue to work to solidify our customer base and further adjust our cost structure in line with our ongoing business."

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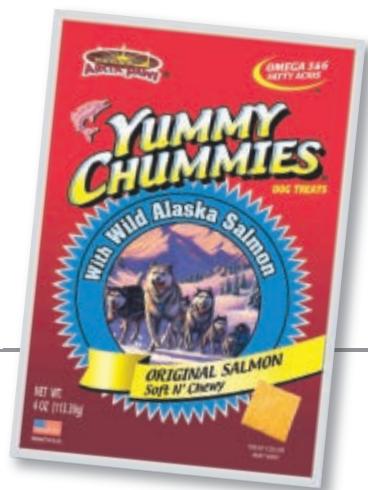


## « Joint health supplement

Recently available in the USA from Interpath Sashas, Sashas Blend is a veterinary prescribed product for joint health. According to Sashas, its Blend is made a complete joint health treatment by being an anti-inflammatory agent, chondroprotector, pain reliever and source of essential building blocks for healthy cartilage and joints. [www.sashasusa.com](http://www.sashasusa.com)

## A taste of Alaska »

Yummy Chummies, produced by Arctic Paws, is the first line of pet treats to utilize Alaskan salmon, according to the company. Although Yummy Chummies are tailored more toward dogs, cat treats are made as well. Salmon, the company says, is high in vitamins, minerals and fatty acids. The salmon treats come in a variety of flavors including original, bacon and salmon & potato. [www.yummychummies.com](http://www.yummychummies.com)



## « Bacteria that preserves

Formula ProBiotic is a premium food for dogs that contains live probiotic bacteria. Released in Europe recently from Bacterfield Ltd., the formula infuses the bacteria inside the kibble, allowing it to remain stable and have a shelf life for at least 15 months, states the company. [www.bacterfield.com](http://www.bacterfield.com)

## Low allergen dog food »

Miss Autumn's Bakery has launched two new dog food lines: Turkey & Brown Rice Formula and Turkey & Sweet Potato Formula. With low allergen proteins like chicken and turkey complemented with organically grown vegetables, the components work together in a synergistic, holistic manner to provide nourishment, immune system support and promote over all canine well-being, says the company. [www.missautumnsbakery.com](http://www.missautumnsbakery.com)



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# Functional treats take off

Thriving Dogswell keeps coming up with new products



BY TIM PHILLIPS, DVM

**M**arco Giannini, the energetic 32-year-old founder and president of Dogswell, makes me feel like a lazy man. His company, which launched its first products in 2004, now has sales “over eight-figures” (over US\$10 million) and growth has been “in the triple digits” in each of the past three years.

Giannini attended the University of Southern California (USA) and completed his MBA with a focus on entrepreneurial studies. In 2003, while working on his MBA, he received the Best Business Plan Award and the Marcia Israel Curley Award for excel-

lence in entrepreneurship. The point is he’s done a lot for his age.

Growing up, Giannini had a white German Shepherd that developed hip dysplasia. Giving her pills was difficult and they tended to upset her stomach, so Giannini began trying out ways to incorporate her pills into treats. That’s how the seeds of Dogswell were planted.

## A huge leap

Since entering the US market, Dogswell has expanded from its base of 4,000 independent pet stores and natural food stores. It scored a major coup early on by being picked up by Whole Foods Market, one of the largest retailers of natural and organic foods for people.

Dogswell currently works with over 45 pet distributors including Pet Food Experts, Animal Supply Co. and Central Garden & Pet. The company also supplies leading natural and specialty foods distributors United Natural Foods Inc., Nature’s Best and Haddon House Food Products Inc. In addition, Dogswell products are available online through many third-party e-tailers of pet products, as well as the company’s e-commerce website ([www.dogswell.com/?section=shop+online](http://www.dogswell.com/?section=shop+online)).

While many companies have expanded from petfood into treats, Dogswell is one of only a few companies to make the relatively huge leap in the other direction, according to Packaged Facts market researchers. In May 2008, Giannini’s company launched a new wet petfood line, in the Happy Hips and Vitality formulas, with ingredients

Dogswell president Marco Giannini wants to grow the business so that 80% of sales are from petfood and 20% from treats.

## Dogswell scored a major coup early on by being picked up by Whole Foods Market.

including “human-grade” chicken and duck, New Zealand lamb, antioxidants, “super fruits,” omega fatty acids, chelated minerals and natural sources of glucosamine and chondroitin. Eventually, Giannini wants to grow the business so that 80% of sales are from petfood and 20% from treats.

### Chicken jerky plus

Dogswell says it's the first company to fortify chicken jerky for dogs with supplements. Made with duck breast, lamb & rice and beef liver, in addition to the original all-natural chicken breast, Dogswell's products come in five formulas, each delivering a functional benefit:

- **Happy Hips**, with glucosamine and chondroitin to help maintain healthy hips and joints;
- **Vitality**, with flaxseed and vitamins to help maintain healthy eyes, skin and coat;
- **Breathies**, with mint and parsley to help maintain fresh breath and healthy teeth;
- **Mellow Mut**, with chamomile and lavender to help achieve a calmer demeanor; and
- **Happy Heart**, with taurine, turmeric and flaxseed to help maintain a healthy heart.

Catswell cat treats launched in 2005, in Vitakitty, Happy Hips and Breathies formulas. During 2007 the company launched two new lines: Biscuits with Benefits dog biscuits and Veggie Life dog treats. Unlike most dog biscuits,



## Business basics

**Headquarters:** Los Angeles, California, USA

**Officers:** Marco Giannini, president and founder; Amanda Thompson, vice president of sales; Amy Kreutzen, vice president of marketing; Berenice Officer, chief financial officer

**Brands:** Dogswell Happy Hips, Vitality, Breathies, Mellow Mut and Happy Heart treats; Catswell Happy Hips, Vitakitty and Breathies; and Dogswell Happy Hips and Vitality canned foods

**Distribution:** In the US and Canada, Whole Foods, Wild Oats, independent pet retailers, leading natural and specialty foods distributors United Natural Foods Inc. Nature's Best and Haddon House Food Products Inc., third-party e-tailers and the company's e-commerce website

**Employees:** 22

**Website:** [www.dogswell.com](http://www.dogswell.com)

## The ideal treat

Packaged Facts estimates total US retail sales of pet supplements and functional treats at US\$1.2 billion in 2007, reflecting a compound annual growth rate (CAGR) of approximately 10% during the five-year period from 2003 to 2007. Packaged Facts estimates that horses account for slightly over half (51%) of 2007 pet supplement and functional treat sales, followed by dogs at 38% and other animal types (including cats) at 11%.

According to the American Pet Products Manufacturers Association 2007-2008 National Pet Owners Survey, 90% of dog owners and 69% of cat owners give their pets treats, compared with 10% and 3% for supplements, respectively. Because snacks and treats are a convenient delivery system for supplements, many marketers of supplements are expanding their product lines into edible treats. At the same time, the category continues to attract new players from other areas of the pet products market.

Presenting at the 2007 Petfood Focus on Treats event, Dr. Robert Taylor, one of the stars of Discovery Channel's *E-Vets Interns* TV show, spoke from a veterinarian's perspective. He says his "ideal treat" would be available in numerous sizes to target different dog sizes and have proven digestibility for utmost safety. Looking ahead, Dr. Taylor said he would like to see better oral drug delivery systems, functional edibles with different taste and smell profiles (so the pet wouldn't get tired of the flavor). Taylor foresees edible vaccines and new products targeting pet obesity via the inclusion of enzymes, probiotics and ingredients to create early satiety, such as palm oil.

Dogswell biscuits rely on meat rather than wheat or corn as their primary ingredient, while the veggie versions are enhanced with vegetables and fruits.

### Cage-free chicken

The company is adamant that Dogswell and Catswell products do not contain: wheat or wheat gluten, unnecessary fillers, hormones, antibiotics, BHA or BHT, by-products, corn, artificial colors or flavors, added salt or added sugar.

Dogswell also promises it uses cage-free chickens that "are kept in spacious chicken coops where they can roam, scratch and perch as they please." Mass-produced chickens, the company notes, are stressed, "resulting in disease and stunted meat that is devoid of taste and total health value."

### Keys to growth

Giannini cites the following as keys to his company's growth:

- A simple product line;
- Keying on benefits vs. ingredients;
- Great employees;

Think of what you want to accomplish

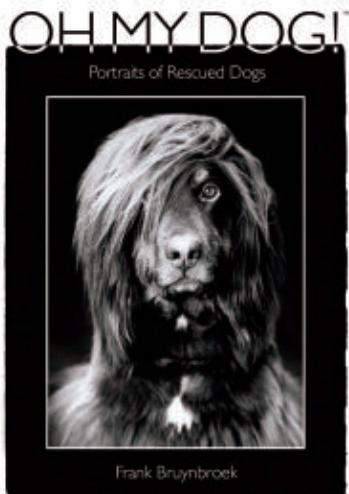
Identify your goals

Establish your timeframe

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Dogswell teams with photographer Frank Bruynbroek for the “Oh My Dog! Portraits of Rescued Dogs” calendar.

- Innovative ingredients;
- A great sampling program—they give away 100,000 samples per month; and
- A focus on health and wellness from employees to the pet owner and pet.

His goal is to build a sustainable

## New products blitz

Dogswell has been busy launching products at the following times:

**January 2004**—Chicken jerky treats including Happy Hips, Happy Heart and Vitality

**October 2004**—Chicken jerky treats including Breathies and Mellow Mut

**August 2005**—Beef liver treats

**June 2006**—Duck and lamb & rice treats

**August 2006**—Catswell, a line of chicken cat treats including Happy Hips, Vitakitty and Breathies

**June 2007**—Veggie Life treats in apple, banana or sweet potato wrapped in chicken in Happy Hips and Vitality formulas

**May 2008**—Cage-free canned food for dogs in Happy Hips and Vitality formulas

Dogswell will be introducing more petfood items in the fall of 2008 and spring of 2009.

petfood company with 20 salespeople (there are eight at this time).

### Toughest challenges

Giannini says his toughest challenges are staying profitable, sticking to basics, having all the products go together and promoting health and well-

ness. He and his company seem up to the challenges. ●

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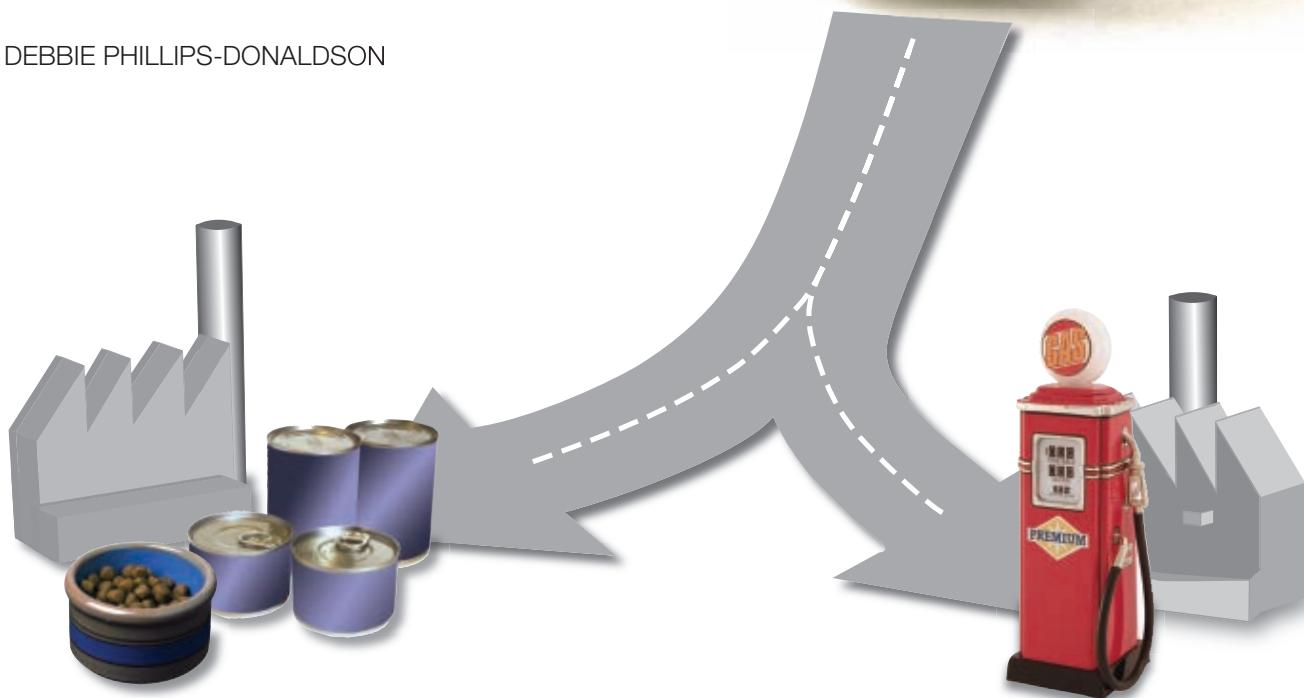
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# The biofuel- petfood connection

Are petfood manufacturers competing with ethanol producers for traditional grain ingredients?

BY DEBBIE PHILLIPS-DONALDSON



**A** cartoon by Robert Ariail of *The State* newspaper in Columbia, South Carolina, USA, paints a stark image: In an updated version of the bibli-

cal tale about the Four Horsemen of the Apocalypse, representing human destruction, three deathly figures on horseback appear next to a car driven by another deathly figure. The car's

license plate reads "Bio-Fuel" and a bumper sticker reads "Corn Powered." One of the horsemen says to his companions, "Check out famine's new ride ..."



## Grain economy, fuel economy

If words and numbers have more impact for you, consider this:

- ▶ Currently about 25% of the US corn crop goes into ethanol production. A US federal law passed earlier this year mandates a minimum of 15 billion gallons of corn-based ethanol by 2015—an amount that could use up nearly all of the US crop, according to some experts.
- ▶ The more corn and other grains that go into biofuel, the less there is to feed humans and animals. “The price of grain is now directly tied to the price of oil,” says Lester Brown, president of Earth Policy Institute, a Washington, DC, US research group, in an April 30 *Washington Post* article. “We used to have a grain economy and a fuel economy. But now they’re beginning to fuse.”
- ▶ The shrinking supply is causing the price of wheat, corn and rice to skyrocket, contributing to a global hunger crisis as growing human populations and improving incomes around the world drive up demand for food and feed grains. Some countries with diets and cultures dependent on rice have started hoarding that grain, further squeezing supplies. Other countries are banning exports of native crops. In some hard-hit places, riots have ensued.
- ▶ The grain situation impacts the livestock industry. According to Tony Karon in an April 11 article

## The more corn and other grains that go into biofuel, the less there is to feed humans and animals.

on Time.com, the rise of middle classes in developing countries like China and India mean “people are eating a lot better than their parents did—particularly more meat. Producing a single calorie of beef can, by some estimates, require eight or more calories of grain feed,” he writes. This multiplier effect will inevitably lead to higher meat and poultry prices, following the trend line for eggs, milk and other dairy products.

### The impact on petfood

This scenario is taking an especially heavy toll on European petfood producers. “We have seen commodity prices of our key ingredients (wheat, barley and maize) more than double

in the last year from a low of £80 (US\$159) per ton to a high of £200 (US\$397) per ton,” says David Davies, managing director of Cambrian Pet Foods in Pencader, Carmarthenshire, United Kingdom. “As the majority of our formulations are fixed, changing formulations really has not been an option. And there would be no economic justification or benefit for doing so, as substitute raw materials have also increased by the same ratio.”

#### Online extra!

Watch a TV news interview with Shelly Gunton of Castor & Pollux Pet Works talking about the rising costs of ingredients and petfoods: [www.kgw.com/video/business-index.html?nvid=240884](http://www.kgw.com/video/business-index.html?nvid=240884).



## WENGER Industry Poll

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[www.petfoodindustry.com](http://www.petfoodindustry.com)

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to answer the poll question.**



So how has Cambrian handled the situation? “We have had to pass on the increased cost,” Davies says. “It’s been virtually a daily subject in both the UK press and TV, so most trade customers and pet owners have been understanding and fully aware, and most petfood manufacturers have been sensible about the

whole process. Ultimately, this transparency has made it easier to explain why the increases have been necessary.”

### Competing with human food

US producers have also been affected, including makers of organic petfoods. “Even though we do not use



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## Transparency has made it easier to explain why the increases have been necessary.

any of the ingredients directly affected by the biofuel surge, like corn, we are feeling the rising costs on all ingredients,” says Brian Connolly, president (“pack leader”) of Castor & Pollux Pet Works, Clackamas, Oregon, USA. “The impact is even more pronounced for us as we are buying human grade organic ingredients and competing directly with the human food supply chain.”

“We’ve experienced increases of anywhere from 3% to 60%,” says Shelly Gunton, VP (“top dog”) of Castor & Pollux, in an interview with KGW TV in Portland, Oregon. “We don’t want to compromise the quality of the food. So we will all see the price go up.” As its products are distributed all over the US and globally, Gunton says the company’s transportation costs are also increasing because of record fuel prices.

“In response,” Connolly says, “we are securing more long-term organic ingredient contracts than we ever have previously. This does not mean lower prices; the opposite is typically the case. There is a premium to be paid to secure supply.”

The KGW TV interview includes the owner of a local pet supply store who says her costs from petfood manufacturers have increased 10 to 14%, which she eventually had to start passing on to her customers.

### Fear in the market

Greg Aldrich, consultant and president of Pet Food & Ingredient Technology Inc., concurs that most US petfood manufacturers he talks to are passing along their increased costs to consumers. “Or they’re hedging their bets in



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the commodities market,” he says.

Another mitigating factor against the rising costs and decreasing supplies of traditional grain ingredients, Aldrich says, are the number of newer companies and products entering the petfood market that use novel grains or ingredients. “Also, we’re seeing more meat and higher quality protein sources in petfoods, which means less grain. But, the animals the meat and protein come from eat grain.

## There is a premium to be paid to secure supply.

“There’s a lot of fear in the market right now,” Aldrich adds. “Free trade is not happening, more hoarding is going on.” But he points out that the supply situation should improve in the coming months. “With US crops coming in soon, we should be OK—but what’s available won’t be cheap.”

Aldrich doesn’t consider biofuels the culprit. “I don’t think the problem is ethanol; it’s the weak US dollar, which can’t buy as much oil.”

## Fickle and volatile

Others also question the extent of biofuels’ role. (See “Are biofuels the scapegoat?” on p. 48.)

“No one seems to think biofuel production is the prime cause of food inflation,” says Davies of Cambrian. “This can probably be attributed to a combination and coincidence of high oil prices, poor harvests, low world stocks, rising demand for food and high

ethanol production. But at a time when crop prices are rising for other reasons it seems that politicians are finding it increasingly uncomfortable to support subsidies and targets for biofuel production that exacerbate the tightness of food supplies.”

Closer to home, that tightness is affecting Davies’ business. “After a period of relative stability over the last four to

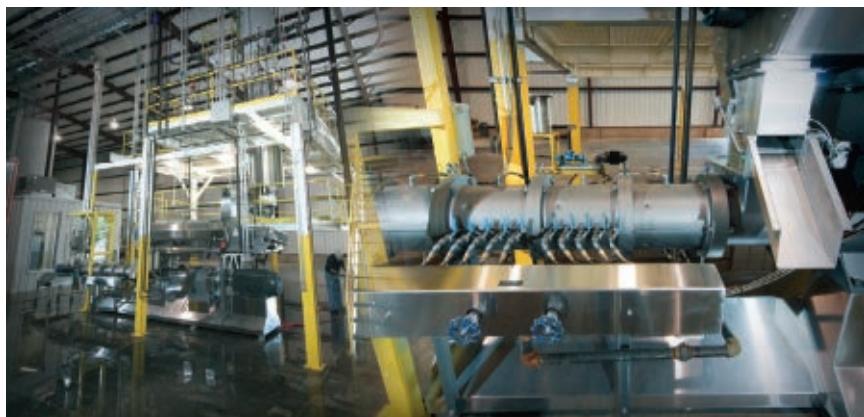
five years, the suddenness of the combined effect of all the economic forces of demand and supply really has created unprecedented increases in key commodity and ingredient costs,” he says. “This has heightened awareness of the fickle and volatile nature of the current global commodity market.”

And currently, the global petfood industry is at the mercy of that market. ●



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# Get more from pal tests

## Innovative data processing solutions for understanding texture-palatability interactions

BY KAMEL EL KHALOU



Cats at the Panelis palatability laboratory.

The wet petfood market is increasingly oriented to consumer macro trends, such as product convenience and the humanization of pets. The increase of chunks in jelly launches, especially in single servings, echoes this orientation. In 2007, 15% of wet cat food launches were chunks in jelly vs. 11% in 2006 (Gnpd database, 2008).

### Comprehensive approach

Nowadays not only pet tastes and nutritional requirements must be considered, but the consumer perception and enjoyment with pets are becoming more important in the petfood industry. So, research and development teams have to consider more sophisticated methods for designing products.

Various research fields can be integrated in the product development process, including physicochemical measurements, sensory analysis and consumer sciences. These data provide a multidimensional description of a product. In the petfood business, the palatability test classically used to evaluate product performance is based on consumption weighing that produces a one-dimensional response. Thus, innovative data treatment methods are needed to relate animals' preferences to product characteristics.

### More sophisticated tools

Several statistical methods, such as preference mapping techniques, allow working out the correlation between consumers' ratings and product characteristics. In palatability assessment, the difficulty is posed by the imbalance between input data structure (product parameters) and output data (consumption amounts).

The PLS regression (partial least square) is a statistical method that produces a graphical display of the analyzed products, with their characteristics, and a mapping of the consumers' preferences. This method builds a causal scheme of relationships between sensory data, physicochemical bloc and hedonic judgments. These analytical scopes are centered on

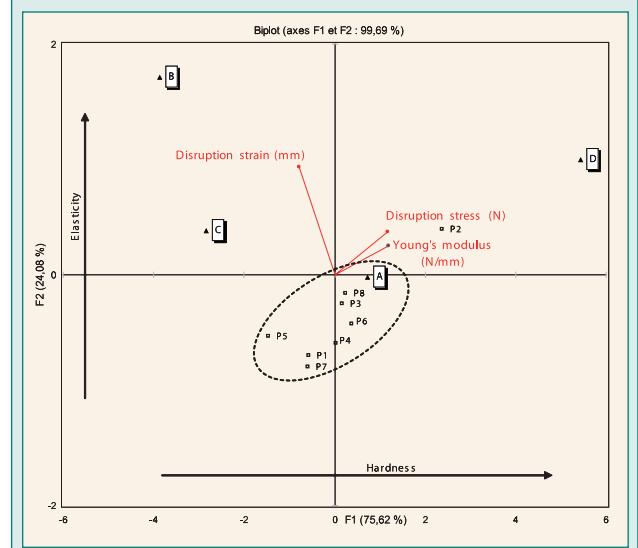
the assessed products and provide valuable descriptions of the consumers' preference profile. As opposed to linear regression analysis, PLS offers the possibility to model one variable (cat's food intake for instance) by a very high number of explanatory variables without risking an over adjustment.

This method was used in a comprehensive study carried out by SPF's Wet R&D team to investigate the interactions between texture of wet cat food and its palatability on chunks in jelly products.

Meat by-products are the main components of wet products, but the variability in raw materials leads to a high variability of

### Figure 1: Jelly textures

Principle components analysis of jelly prototypes texture, deduced from the penetrometric disruption curve. P1 through P8 are various jellies extracted from European brands for comparison.



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texture. On the other hand, another material commonly used in wet products has a high textural regularity: the jelly. Rheological properties of gels after retorting can be predicted with relatively good precision, which makes them especially suitable models for research.

### Experimental design

Four jellies were made using four different gelling agents with thermo-reversible properties to build an extended textural field (Figure 1, p. 30). One jelly was representative of common jelly-based products found on the market. The same dose of palatability enhancer (SPF C’Sens) was added to each of the formulas.

Instrumental texture analysis was done using a penetrometry technique (measuring the penetrability of a material) for measurement of gel hardness, rigidity and springiness. The texture measurement showed highly significant divergences in texture amongst the four prototypes. The jellies were then assessed by a human sensory panel for texture and odor intensity characterization.

The jellies’ characterization (texture, sensory description), and “cats first choices” were processed as input data. A full design and specific palatability testing in a cat expert panel (Panalis, France) provided cumulated individual consumption values as output data. The PLS permitted the comparison of individual preferences of the 40 cats with product characteristics to show the relationship between texture differences and palatability.

### Texture and palatability correlated

Data obtained for the four jelly products (texture profiles, sensory evaluation and palatability preferences) are displayed in Figure 2. In this PLS plot, jellies A and D (harder gels) are divergent from jellies B and C (more elastic gels). The human sensory description of texture is correlated to the instrumentally measured texture according to the positioning of these variables.

Cats’ preferences are described by their relative proximity to product points. The plot highlights a sensorial consensus centered on soft and elastic jellies that are characterized by higher odor intensity and first choices values. Hard and rigid jellies were clearly rejected by the majority of cats. This apparent negative correlation between palatability and gel strength lead to the hypothesis of a relationship with the flavor retention.

### Matrix effect involved?

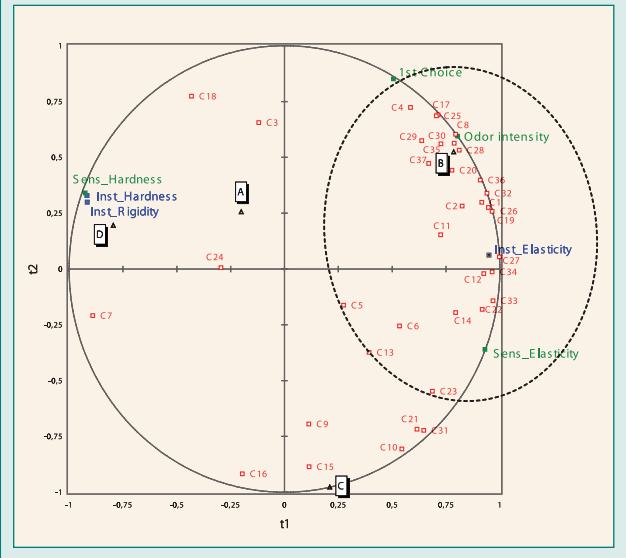
Renard (Renard *et al.*, 2006) explained that the more cohesive the structure (with a highly organized polysaccharide network), the more the volatile aromatic compounds are retained, and vice versa. His work indicates the matrix effect that can explain, in this study, how texture has a retention effect on flavor-release in the jellies and thus influence cats’ preferences.

The sensory perception of gel texture can be divided into three main areas:

- The mechanical perception of food texture;
- The acoustic feeling during mastication; and
- The matrix effect.

## Figure 2: Elastic jellies preferred

PLS regression analysis data. Red plots indicate cat consumptions; “Sens\_” = scored by human sensory analysis; and “Inst\_” = measured by instruments.



Further experiments were conducted on gel texture modulation to produce controlled variations in jelly textures, and to assess cats’ perceptions toward those differences. Odor induced consumption was shown in cats with another experimental device that showed the importance of flavor release in palatability. These observations corroborate the evidence of the matrix effect in cat preferences.

### Complex and multi-variable

From the product design point of view, formulation and process parameters are known to impact directly on gel texture. Thus, through the matrix effect, they impact indirectly on palatability. For this reason, it is necessary to consider gel texture as a way to improve the performance of palatability enhancers.

The addition of chunks, the mineral content, pH properties, moisture transfers and thermal treatments affect gel texture. Based on these investigations, SPF’s Wet Research team built a model of physicochemical interactions in chunks in jelly. The study of feline palatability remains a complex and multi-variable area. Improving knowledge requires developing innovative, sensitive data processing techniques. ●

*Mr. El Khaloui is wet petfood R&D project manager at SPF, the petfood palatability division of Diana Ingredients. Contact him at Tel: +33.2.97.93.80.80, kelkhaloui@spf-diana.com, www.spf-diana.com.*

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# The power of **process control**

## Monitor your process lines 24 hours a day, seven days a week

BY JESSICA TAYLOR BOND

**M**aximizing profit margins and avoiding misbranding means knowing just what goes into your petfood and treat products. Accurate measurement and precise adherence to levels of moisture, fat, proteins and other key nutrients is more important than ever. That means ideal process control technology should be able to:

- Operate in harsh industrial environments;
- Take measurements in real-time;
- Have little to no human intervention for operation and calibration; and
- Provide instant, accurate data.

### The speed of light

Ometric provides manufacturing and process spectroscopy solutions for a broad range of industry categories—including petfood manufacturers—that share a need for real-time,

in-line continuous process control and final product testing. The company has recently unveiled its SpectrInLine Process Control Suite, which is installed directly in the process line. This technology allows manufacturers to measure, monitor and control their manufacturing process and can be applied to:

- Pre and post extrusion;
- Pre and post drying;
- Pre and post enrobing;
- Real-time moisture control; and
- Fat and protein control and monitoring.

The technology also works for a variety of shapes and sizes of feline and canine food and the results are not affected by sample color.

“Due to significant limitations associated with sample testing, modern manufacturers can no longer afford to rely on traditional methods. Large amounts of out of spec product can be



**Ometric's SpectrInLine Process Control Suite provides real-time, in-line control and instant data analysis of manufacturing processes on-site or from a remote location.**

produced waiting for lab results,” says Walter Alessandrini, chairman and CEO of Ometric Corp. “Our revolutionary technology is specifically designed to address manufacturing process control concerns by providing real-time benefits that ensure fewer product recalls, less waste, minimized liability and an increased savings on resources.”

Ometric's technology allows users to view production runs by their choice of dates, shifts, product lines and plants. Results are shown in a graphical format and are designed for easy interpretation. Information may also be shared with others, allowing managers to analyze current and historical data and adjust their processes as needed to ensure proper quality and final product formulation.

According to the company, SpectrIn-Line Processware is a complete system that utilizes application specific multivariate optical computing to provide continuous spectroscopy in real-time for indus-



**A challenge in the petfood industry is providing high-volume process logic control for both wet and dry petfoods at multiple control points, from the introduction of ingredients to final validation.**

trial processes. The SpectrInLine process control suite's web-based interface gives users access to critical manufacturing information from any computer, PDA or smart phone with Internet access.

## Control your quality

CSB-System now offers a method that ensures constant and reliable monitoring of your entire manufacturing process. Quality Management is a fully integrated feature of the business process solution, according to the company. It fully complies with all industry standards for HACCP, ISO 9001:2000 and the International Food Standard. The QM and HACCP module is completely integrated into the materials management of an existing CSB system to ensure that all tests that may be done during production can be recorded in process (e.g., right at receiving). The Quality Management arrangement also makes certain that the proper action is initiated instantly as the results are processed. In extended options of the system, you can use the results to adjust your pet product recipes based on raw material potential (meat protein, fat, sugar content).

## Detective work

The InAlyzer system using the Thermo Scientific Guided Microwave

## Benefits of in-line analysis:

1. Respond quickly to product fluctuations;
2. Reduce off-spec production;
3. Improve profitability;
4. Enable customer complaint investigations;
5. Control feedback;
6. Spot production artifacts;
7. Eliminate sampling errors;
8. Characterize drift in processes;
9. Provide statistical analysis of processes; and
10. Control "fast" processes.

From the Petfood Forum 2008 presentation, "In-Line Analysis of Water Activity and Nutrients Using Multivariate Optical Computing" by M.L. Myrick, University of South Carolina. <http://breeze.sc.edu/petfoodforum08>.

Spectrometer (GMS) is an in-line, multi-constituent analyzer that monitors any process flowing through a pipeline. The GMS uses very low-powered microwave energy at hundreds of specific frequencies to analyze the physical and chemical properties of a sample. GMS is best at determining multiple constituent concentrations of a process with varying particle sizes. The system includes the chamber, electronics control module, industrial PC and PC-based software for developing calibrations and SQL database for key data and configuring the InAlyzer. It is available in both online process and at-line laboratory configurations.

InAlyzer can measure water activity in petfood in real-time and in-line, a very important factor with regard to spoilage and shelf life. Unlike other analyzers, its simple design contains no moving parts or optical components that require routine maintenance, resulting in extremely low long-term cost of ownership, says Aaron Chabino, project manager at ScanAmerican Corp, which distributes the InAlyzer in North America. Advantages of GMS include:

- Analyzes multiphase products such as slurries, dough, liquids and larger particle size products;
- Analyzes multiple components;
- Measurement is representative of the bulk product even for heterogeneous materials, as it is not a surface measurement; and
- Results are not affected by the sample color.

Analytical tests that were once carried out in the lab can now become part of the online inspection process, which reduces the risk of producing out-of-specification product. The Thermo Scientific Spectra-Quad online moisture and constituent analyzer provides continuous, accurate, real-time information about the concentration of key product components. According to Darrel T. Butler, GMS specialist and key account manager for Thermo Fisher Scientific, the Spectra-Quad detects not only melamine present in petfood but protein independently as well.

The Spectra-Quad uses a measure-



**Thermo Scientific has developed algorithms for the Spectra-Quad to detect not only melamine present in petfood but protein independently as well.**

ment technique based on near infrared (NIR) light absorption. It is a non-contact, nondestructive and non-hazardous method. Chemical bonds absorb NIR light at well-defined wavelengths. The absorption intensity at a given wavelength is proportional to the amount of the constituent in the material.

A quartz-halogen light source emits NIR light and the light from the source passes through a rotating filter wheel. The filters in the wheel allow only a narrow band of NIR wavelengths to pass through. The reference wavelength provides a baseline for the measurement of the sample. Some of the light is absorbed by the sample and the rest is reflected. The reflected light is collected and then focused onto a detector. The signal at the detector is processed to provide a reading that is proportional to the constituent concentration.

A full function operator interface permits easy access to all of the analyzer's setup and diagnostic functions. The display includes the product's name and its measured values, and can be configured to function in several languages. The Spectra-Quad is available with a wide range of environmental options, which enables the analyzer to perform in virtually any petfood or treat production situation, according to the company. ●

**Online extra!** Watch a video of new process control technology available from Thermo Fisher Scientific at [www.petfoodindustry.com/0806PETprocess.aspx](http://www.petfoodindustry.com/0806PETprocess.aspx).

# What veterinarians think about petfood

**M**ost of my public presentations over the last several years have been directed toward the petfood industry. Thus, it was with some excitement but also a little trepidation that I was given the opportunity to speak before a veterinary audience. It wasn't a single one-hour talk, but rather seven (six to veterinarians and one to veterinary technicians). In addition, I led a "meet the expert" lunch discussion with a smaller group of vets where the issues could be discussed in a more informal setting.

I talked about petfood labeling, the roles of the Food and Drug Administration (FDA) and the Association of American Feed Control Officials (AAFCO) in regulation, ingredient controversies, unconventional diets, dietary supplements, natural and organic petfoods and petfood safety. The audience seemed very interested in the topics and asked a lot of questions. I hope my information was helpful to the attendees, but it was their questions and comments during and between presentations that gave me insight as to their prevailing views.

## Vets' views of petfoods

I can't speak for the attitudes of everyone in the audience, but from the nature of the questions and comments I received, I think in general, vets view petfoods relatively favorably. I didn't perceive hostility regarding the events of last year or animosity toward the industry in general. Rather, despite some of the bad press being circulated (especially since the recalls last year), there's an understanding that the issues are complex and for the most part, they are willing to give the industry the benefit of the doubt.

**Vets would appreciate sound facts to help them respond to this barrage of misinformation.**

— David Dzanis



Veterinarians, I believe, are typically practical people, in that they can distinguish issues that should be of concern and those that are less important. For example, my impression was that while there was concern over matters such as safe handling of raw foods, most understood that properly processed by-products can be perfectly acceptable ingredients and safe for animals, even though they may not be normally consumed by humans. Then again, in my experience vets may have a lower threshold than the average consumer when it comes to food aesthetics.

## Vets want calorie information

That is not to say veterinarians do not have criticisms of petfoods, however. A number of vets were skeptical regarding designations for use beyond basic life stages, especially with regard to breed-specific foods.

Without any prompting on my part, a veterinarian asked, "When are they going to require calorie information?" He thought that would be very useful information and didn't understand why it wasn't on the label. His question allowed me a chance to discuss the American College of Veterinary

Nutrition's proposal to AAFCO, its current status and hopeful outcome. Those present voicing opinions were very much in favor of the idea of mandatory calorie content statements.

Other issues that drew some concern include the "product family" method of nutritional adequacy substantiation. I think since vet students have long been taught that AAFCO feeding trials are superior in ensuring the nutritive value of a food compared to AAFCO profiles, they were dismayed to find that many products bearing the "Animal feeding tests..." label statement may not have undergone the full feed testing procedure.

Many were also unpleasantly surprised that data to support the efficacy of "therapeutic diets" (i.e., foods distributed directly by vets to clients for mitigation of certain disease processes) were not routinely reviewed by a regulatory agency.

## Vets want straight talk

Clients often bring their veterinarians information from the Internet or elsewhere that either falsely disparages a product or ingredient (if not the industry as a whole) or promotes outlandish claims of benefit for another diet or

ingredient. Thus, vets would appreciate sound facts to help them respond to this barrage of misinformation. For example, I received several questions about how they should best address their clients' concerns regarding the source of ingredients in petfoods and other safety matters. On the other hand, materials that try to paint a totally noncritical picture of petfoods would be perceived as biased as well and would likely be viewed with due skepticism.

## Vets want assurances

Regarding veterinarians' understanding of how petfoods are regulated, most know that FDA has a role, but they know less about AAFCO and state agency involvement. Hopefully, I was able to clear up any misperceptions (e.g., that AAFCO is not a trade association). However, I'm not sure how much detail they want to know.

For example, I'm unsure they really care about the legal distinction between "foods" and "drugs" as much as they want assurances that any label statement (whether a "drug claim," or not) is truthful and not misleading. Similarly, it may be less impor-

**Those present voicing opinions were very much in favor of the idea of mandatory calorie content statements.**

*Dr. Dzanis is a writer and independent consultant for the petfood and animal feed industries on 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.*

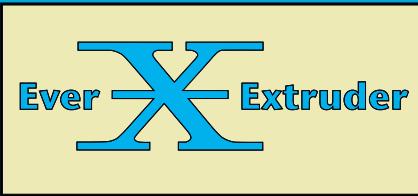
tant that a nutraceutical product may be regulated as an animal feed or an "unapproved drug of low regulatory priority" than to know whether the government is actively reviewing products to ensure safety regardless of regulatory status.

To my surprise, the least attended presentation was my talk on petfood safety. Maybe there was a very popular speaker on the program in another room, I don't know, but it also was the

one that prompted the fewest audience questions. I would have thought the recalls last year would have sparked more interest, but with all the emphasis at veterinary meetings since then, perhaps they are weary of the topic for now. ●

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## Kelp: a viable source of iodine?

**K**elp is part of a broader group of seaweeds/algae that have become popular ingredients in dog and cat supplements, home-prepared petfoods, raw petfoods and specialty or boutique petfoods. Seaweeds/algae are a rich source of:

- Dietary fiber;
- Minerals such as calcium and iron;
- Vitamins such as folic acid;
- Antioxidants such as alpha- and beta-carotene;
- Omega-3 fatty acids such as alpha-linolenic acid and eicosapentaenoic acid; and
- The flavor-enhancing amino acid glutamate.

**Kelp contains some of the highest amounts of iodine, but it can vary greatly.**

— Greg Aldrich



Despite these benefits, the trace mineral iodine is the main reason for adding kelp. Is it a viable source of iodine?

### Iodine nutrition

Iodine was one of the first recognized essential nutrients due to its con-

nection with a very visual, disfiguring disease called goiter. Goiter appears as an enlargement of the thyroid gland in the neck. References to goiter and its treatment with herbs and seaweed date back some 4,000 to 5,000 years.

At the core of this disease is a disruption in the normal attachment of iodine to tyrosine in the formation of the thyroid hormones thyroxine ( $T_4$ ) and triiodothyronine ( $T_3$ ). These hormones serve as the body's thermostat, regulating metabolism and physiology. Deficiencies can result in retarded physical and mental development, arrested adrenal and gonadal development, obesity, incoordination, dermatitis and hair loss (alopecia), to name but a few problems.

### Hypothyroidism

To be effective, iodine goes through a series of oxidation states. In nature, iodine occurs most commonly as iodide (I<sup>-</sup>), elemental iodine (I<sub>2</sub>) and iodate (IO<sub>3</sub><sup>-</sup>). Following ingestion, iodine and iodate are reduced to iodide, then absorbed and circulated throughout the body. Circulating iodide is trapped by the thyroid and oxidized by thyroid peroxidase to iodine for attachment to tyrosine.

If iodine is insufficient or if antagonists to normal iodination of tyrosine are present (goitrogens), then a hormone overstimulates the thyroid gland in an effort to maintain the body in a normal state. It's actually a hypothyroid state:

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The thyroid overworks to produce thyroid hormones and becomes enlarged as it tries to regulate the body's normal functioning. Hypothyroidism is one of the most commonly diagnosed endocrine diseases. If the cause is insufficient dietary iodine or goitrogens, it can usually be treated successfully.

## From seaweeds/algae

The iodine content of seaweeds/algae is quite variable and depends on species, location, season, plant part, harvesting method and storage conditions. Of the edible seaweeds/algae, kelp (primarily *Laminaria*) contains some of the highest naturally occurring amounts of iodine—in the range of 1,542 to 5,307 parts per million (ppm) with an average of 2,990 ppm (Teas *et al.*, 2004). This iodine is predominately water soluble and, since most (about 88%) is in the iodide form, it's subject to oxidation during drying and exposure to sunlight.

Kelp is an acceptable source of iodine in the diet, though reports on bioavailability in animals is lacking. Since dried kelp is sold in a free flowable powder, it can be easily handled. But given its ability to oxidize, kelp should be stored in protective packaging, avoiding extremes in heat and direct sunlight.

## For the petfood label

Kelp is a more variable, volatile and less cost effective form of iodine than standard sources such as potassium iodide, calcium iodate or ethylenediamine dihydriodide. Thus, the motivation to incorporate kelp in the diet has to be driven by a consumer-based message of delivering iodine in a unique form or a deliberate effort to reduce the number of chemical sounding descriptors on the ingredient panel.

The names currently approved by the Association of American Feed Con-

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*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.*

trol Officials for these ingredients are relatively consumer friendly:

[60.76] “Dried Seaweed Meal is the product resulting from drying and grinding non-toxic macroscopic marine algae (marine plants) of the following botanical divisions: Division RHODOPHYTA (Red Algae); Division PHAEOPHYTA (Brown Algae); Division CHLOROPHYTA (Green Algae)....”

[60.19] “Dried Kelp is dried seaweed of the families *Laminariaceae* and *Fucaeae*...sold as a source of iodine (I), the minimum percentage of iodine must be declared.”

## Mixing it all together

Although the iodine requirements of dogs and cats is presumed to be small (ppm), balancing dietary requirements is not trivial. This is because the iodine content of base ingredients used in petfoods is seldom reported or measured. So the starting point for balancing io-

dine levels is often assumed to be zero.

Meeting daily requirements, therefore, depends on supplemental sources: just enough, but not too much. Because kelp carries a suitable level of iodine, it can certainly fulfill the role. However, the iodine content of kelp can vary greatly and at the extreme high-end of the range could be considered a goitrogen. Further, kelp can bio-concentrate more than just iodine; for example, toxic levels of arsenic have also been noted.

Petfood companies should use kelp only with much skepticism about its iodine content and level of contaminants. When sourcing, verify the iodine and contaminate content. If that condition is met, kelp can be a viable source of iodine in pet diets. ●

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# Market Report

## Petfood prices on the rise

The term “recession-proof” is often applied to the pet products market, and it now appears “disaster-resistant” may join the list. Following the biggest petfood recall in history, the North American market has snapped back, with both retail sales and new product introductions exceeding pre-recall levels.

But not everything is positive. During the 52 weeks ending April 20, 2008, sales of dog food in mass-market outlets tracked by Information Resources Inc. (IRI)—supermarkets, drugstores and mass merchandisers excluding Wal-Mart—rose just 2.5%. This is not exactly stellar, even less so given that poundage declined by the same amount.

With cat food, dollar sales rose 3.2% while volume sales fell 4.1%. These figures clearly illustrate that dollar sales gains are coming from higher prices rather than incremental growth, which has been the case for some time. What may be surprising is just how quickly and steadily prices have been going up.

### Paying more than ever

Trends in consumer price indexes bear out that US consumers are paying more for petfood than ever before. According to the US Bureau of Labor Statistics, the consumer price index for petfood has risen 23% from 1998 to

**Table 1: US petfood price indexes, 1998-2008**

**US Bureau of Labor Statistics show consumer prices for petfood rose 23% in the past 10 years, while petfood producer prices increased 26% (2007 figures are preliminary, 2008 represents January-March averages).**

Year	Consumer price index*	Producer price index**	Year	Consumer price index*	Producer price index**
1998	101.5	154.8	2004	110.3	166.8
1999	102.4	153.2	2005	110.7	169.8
2000	102.3	152.4	2006	115.5	172.9
2001	104.3	156.9	2007	119.4	182.7
2002	106.0	156.9	2008	124.8	194.6
2003	106.7	157.5	* December 1997 = 100. Figures not seasonally adjusted.		** Base date = 1992. Figures are seasonally adjusted.

2008, with the majority of this increase in 2003. Though some manufacturers claim they’ve been absorbing higher production costs, government data show the increases have been passed on to consumers almost point by point, with the producer price index for petfood rising 26% during the 10 years (Table 1).

With high energy costs and petfood increasingly competing with human food for ingredients, production costs can be expected to continue to increase for the foreseeable future. Add in the ongoing focus on ingredient sourcing and traceability spurred by the recalls,

and one can rest assured that petfood prices will continue to rise.

### Sharp contrasts

For the premium demographics many companies now consider their base — Americans with high household incomes and intense pets-as-family proclivities — all this may not mean much. These are the pet owners least likely to feel the economic pinch or cut back on indulging their “kids.”

In sharp contrast, a fair number of economically challenged consumers may drop out of the pet market, at least temporarily. Already, dozens of US shelters have reported a spike in consumers’ dropping off pets because they can no longer afford their care.

That leaves all those pet owners in the middle. After the recalls, some may have switched to higher priced foods, but as the going gets tougher, many may be considering moderately priced options.

A prime example is Mars’ Goodlife Recipe, launched a few months before the recalls. The dry dog food and treats had sales of US\$15.3 million during the first two quarters of 2007, according to IRI. During the 52 weeks ending April 20, 2008, sales rose 365%. ●

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## Key Concepts

### ► Fiber and satiety in dogs

Satiety and body weight can be controlled in Beagles fed *ad libitum* with foods containing > 25% total dietary fiber.

### ► Energy restriction decreases expenditure

Energy restriction results in a mass-adjusted decrease in energy expenditure in cats that persists after weight regain.

## Fiber and satiety in dogs

This study investigated the effects of feeding two foods with elevated levels of total dietary fiber on satiety in dogs. Both foods were formulated to contain similar levels of total dietary fiber (TDF; > 25% dry matter basis). The foods were fed to two groups of 10 Beagles for 16 weeks to determine the effect of total dietary fiber on satiety.

During the study dogs were given *ad libitum* access to the foods for 45 minutes. Food intake was recorded daily and body weight was recorded weekly to determine the effects of fiber on satiety and weight maintenance. During the 16 week study, body weight decreased (1.4 kg on average;  $P < 0.01$ ) on both treatments while intake increased (82 grams on average;  $P < 0.01$ ). There were no differences between the two treatments for intake or body weight at week 1 or 16, indicating that the level of TDF in the food was efficacious in promoting satiety in Beagles.

Interestingly, dogs only lost weight during weeks 1 to 4 and then maintained body weight thereafter (weeks 4 to 16). The results of this study demonstrate that satiety and body weight can be controlled in Beagles fed *ad libitum* with foods containing > 25% total dietary fiber.

**Source:** R.M. Yamka, *et al.*, 2008. Effect of total dietary fiber on satiety in dogs. *FASEB J.* 22:1117.3.

## Energy restriction decreases expenditure

Dietary energy restriction (ER) is used to treat obesity in cats but it is often unsuccessful. This study examined whether ER results in a sustained

decrease in mass-adjusted energy expenditure (EE) that may oppose weight loss and promote weight regain. EE and body composition were measured in 10 adult neutered cats at three times: baseline (obese cats), during weight loss (40% ER) and following weight regain.

The cats started with a body weight (BW) of  $6.1 \pm 0.30$  kg, body condition score (BCS) of  $7.6 \pm 0.14$  (on a 9-point scale) and fat body mass (FM) of  $38 \pm 1.0\%$  of BW. After weight loss, BW was  $5.0 \pm 0.19$  kg, BCS was  $5.5 \pm 0.07$  kg

and FM was  $31 \pm 1.6\%$  ( $P < 0.01$ ). After weight regain, BW was  $6.2 \pm 0.30$  kg, BCS was  $7.7 \pm 0.16$  and FM was  $42 \pm 1.8\%$  ( $P < 0.01$ ). Total EE decreased from  $1258 \pm 33.7$  kJ/d to  $1025 \pm 39.6$  kJ/d during weight loss ( $P < 0.001$ ). After weight regain, EE was still lower than baseline ( $1103 \pm 41.5$  kJ/d,  $P < 0.001$ ). Energy intake (EI) at baseline ( $1337 \pm 50.6$  kJ/d) was higher than EI after weight loss and regain ( $1217 \pm 61.2$  kJ/d), resulting in no differences in energy balance ( $78 \pm 30.4$  and  $104 \pm 35.4$  kJ/d, respectively,  $P = 0.581$ ). These results support the hypothesis that ER results in a mass-adjusted decrease in EE in cats that is maintained after weight regain.

**Source:** C. Villaverde, *et al.*, 2008. Energy restriction results in a mass-adjusted decrease in energy expenditure in cats that is maintained after weight regain. *J. Nutr.* 138: 856-860.

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# Product News

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## Palletizer receives upgrade

A newer version of the Master 3500 High Level Palletizer has been introduced by Thiele Technologies. Improved features include a servo-controlled layer pusher and pallet lift motors, advanced machine diagnostics and an integrated Allen-Bradley control architecture. According to Thiele, the improved palletizer offers product changeover in approximately 15 seconds.

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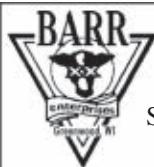


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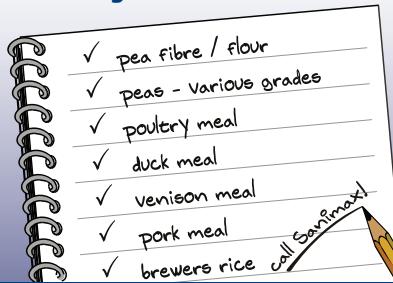
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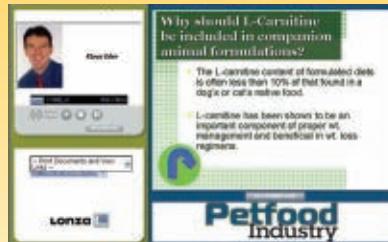


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## Are biofuels the scapegoat?

**“B**urning food today to serve the mobility of rich countries is a crime against humanity,” said Jean Ziegler, a special rapporteur on the Right to Food for the United Nations, in a radio interview quoted in an April 28 Time.com article. Ziegler was condemning the use of food and feed crops such as corn in the production of biofuels.

His harsh criticism echoed that of many others now decrying what seemed like such a good idea less than two years ago, when US and European Union policies encouraged and even mandated increasing levels of ethanol production from corn and other sources. “Food-to-fuel mandates were created for the right reasons,” wrote Lester Brown of the Earth Policy Institute and Jonathan Lewis of the Clean Air Task Force in an April 22 essay on WashingtonPost.com. “But ... new evidence has shown that the justifications for these mandates were inaccurate.”

“In just 15 months, corn went from unknown to savior to villain,” says Mark Lyons, PhD, director of international projects for Alltech, an animal health and nutrition company.

### A bad rap?

Critics like Brown say ethanol production actually requires more energy than it generates, creates hazardous by-products and wreaks havoc on the food and feed supply chain, shrinking supplies while driving up prices. (Petfood is not immune; see p. 26.)

But proponents of biofuels argue

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### Corn has gone from unknown to savior to villain.

— Debbie Phillips-Donaldson



they're getting a bad rap. For example, Brazil has won praise for the success of its sugarcane ethanol industry, which supplies 45% of the country's transportation fuel and is touted as being more environmentally friendly and efficient and less expensive to produce than corn-based ethanol.

“Biofuels are not the villains threatening the food security of poorer nations,” says Luiz Inacio Lula da Silva, Brazil's president, speaking at a conference and quoted in the Time.com article. He says the real crime is regarding all biofuels as the same.

### Theoretical vs. proven

Alternatives to corn-based ethanol are starting to earn more attention. Alltech just received a US\$30 million grant from the US Department of Energy to help build a biorefinery in Kentucky that will use cellulosic raw materials, such as switch grass, corn cobs and corn stover. It will also be able to produce algae, which the company claims could theoretically produce 5,000 gallons of biofuel per acre per year versus the 400 gallons per acre produced by corn.

It's theoretical because the technology is not yet fully developed. That's the problem with cellulosic-based ethanol, too—current technology means its environmental impact isn't much better than that for corn-based. Yet some experts see today's corn ethanol technology and industry serving as important bridges to

future, more proven biofuels using more efficient and renewable resources.

### Ethanol's response

For example, ICM, a builder of ethanol plants based in Colwich, Kansas, USA, is partnering with a company called Coskata (who also claims General Motors as a partner) to use patented microbes to convert various materials to ethanol on a mass scale. The first plant is scheduled to open in late 2010.

Don Endres, CEO of VeraSun Energy, an ethanol producer based in Brookings, South Dakota, USA, contends in an April 30 *Washington Post* article that the corn used to make ethanol isn't the same kind people eat, and his plants also produce dried distillers grain sold to farmers as animal feed. He believes yields will increase and someday provide enough corn for food and fuel.

Meanwhile, people around the world are struggling to feed their families—and their pets. Biofuels will probably continue to get some of the blame. Reid Detchon, executive director of think tank Energy Future Coalition, says in the Time.com article: “I think the sudden rise in price of food has people looking for causes, and biofuels are a convenient scapegoat.” ●

*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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