

September 2008

# Petfood WATT Industry

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## Affinity for growth

Global leader Affinity Petcare  
SA focuses on its mission, p. 24

Is petfood  
recession-proof?

Taste that innovates

Packaging that POPS

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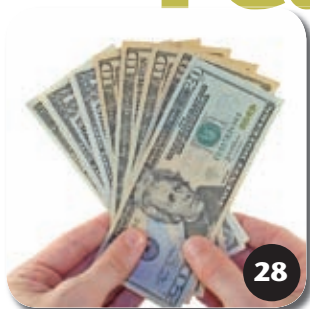


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Photo by—Oriol Forn, [www.ofmedia.com](http://www.ofmedia.com).

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## Web departments

### 1. Petfood Industry

**Videos:** Clips shot at Petfood Forum 2008. [www.petfoodindustry.com/ShowVideo.aspx?ID=21982](http://www.petfoodindustry.com/ShowVideo.aspx?ID=21982)



### 2. Buyer's Guide:

Browse by category—equipment, ingredients, packaging, services and testing. [www.directorypub.com/PET](http://www.directorypub.com/PET)

**3. General Forum:** Visit the general forum and post new topics or respond to old ones. [www.petfoodindustry.com/discussions.aspx?g=topics&f=782](http://www.petfoodindustry.com/discussions.aspx?g=topics&f=782)

**4. AAFCO surprise:** Dr. Dave Dzanis reports AAFCO's board unexpectedly voted to reject a policy that would have allowed petfood companies to make specified informational statements on product labels. [www.petfoodindustry.com/0809Dzanis.aspx](http://www.petfoodindustry.com/0809Dzanis.aspx)

## Exclusive Web content

### 1. Raw petfood guidelines

In 2004, FDA issued guidelines for companies marketing raw meat to pets that can be found at [www.petfoodindustry.com/0809PETfda.aspx](http://www.petfoodindustry.com/0809PETfda.aspx)



### 2. More Affinity

For more exclusive content about Affinity Pet-care SA, go to [www.petfoodindustry.com/0809PETaffinity.aspx](http://www.petfoodindustry.com/0809PETaffinity.aspx)

### 3. 21 trends

For Euromonitor's list of 21 trends leading to 2012, visit:

[www.petfoodindustry.com/0809PETdata21.aspx](http://www.petfoodindustry.com/0809PETdata21.aspx)



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# They want to get involved

**A**s the status of pets continues to rise, many pet owners seem willing to put more time into preparing meals for their pets (see Market Report, p. 56). Their motivations might include:

- ▶ Giving their pets more pleasure at mealtimes;
- ▶ Using variety to prevent boredom;
- ▶ Adding variety in hopes of providing a more diverse and complete nutrient intake;
- ▶ Being convinced properly formulated raw diets supply all the essential nutrients we know about and *do not* know about;
- ▶ Believing fresh is better;
- ▶ Strengthening the bond with their pet; and
- ▶ Enjoying the satisfaction of home preparation.

### New wave petfoods

Several companies are catering to pet owners who want to get more involved with feeding their pets. Following are some examples.



**The rotation diet encourages pet owners to feed various protein types (beef, chicken and salmon) and forms (raw, dry and wet).**

**Nature's Variety.** This company, with headquarters in Lincoln, Nebraska, USA, offers several products for implementing its "rotation diet" concept. Pet owners can feed various protein types (beef, chicken and salmon) and forms (raw, dry and wet). Website: [www.naturesvariety.com](http://www.naturesvariety.com).

**Their motivations might include believing fresh is better.**

— Tim Phillips



**Vitakraft.** In May 2008, this German company introduced "Mix It" dog and cat foods throughout Europe. The idea is to provide variety without having to change the main food. Website: [www.vitakraft.de](http://www.vitakraft.de).

**Wild Kitty.** Based in Arundel, Maine, USA, this company sells a "Homemade Cat Food Kit." With the kit, cat owners can make raw or cooked cat food using boneless poultry. Website: [www.wildkittycatfood.com](http://www.wildkittycatfood.com).

**Sojourner Farms.** This Minneapolis, Minnesota, USA-based company offers three "natural petfood mixes." Pet owners add meat and water to one of the mixes for "fresh, homemade petfood in minutes." Website: [www.sojos.com](http://www.sojos.com).

**Balance IT.** Developed by a group of veterinary nutritionists, this is a web-based veterinary nutrition software that is used by veterinarians along with a line of Balance IT supplements. It enables veterinarians to try new con-



**Vitakraft's "Mix It" dog and cat foods provide variety without having to change the main food.**

cepts in nutritional therapies with homemade petfood recipes. Website: [dvmconsulting.com/about.html](http://dvmconsulting.com/about.html).

**The Honest Kitchen.** This petfood company, based in San Diego, California, USA, is family owned. It sells freeze-dried petfoods containing a combination of raw and cooked ingredients. Pet owners add water and their pet's choice of vegetables, fruits and raw or cooked meats. Website: [www.thehonestkitchen.com](http://www.thehonestkitchen.com).

### Major marketers

What's next? If the market continues to develop, which seems likely, we can expect to see more major marketers of traditional commercial diets adding high-involvement petfoods to their product lines. ●

## FDA worries

The US Food and Drug Administration (FDA) is worried about people who feed their pets raw meat contracting food-borne illnesses. In 2004, FDA issued guidelines for companies marketing raw meat to pets that can be found at [www.fda.gov/cvm/Guidance/Guide122.pdf](http://www.fda.gov/cvm/Guidance/Guide122.pdf).

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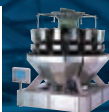


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## Quick hits

- ▶ Kathryn T. Norman has joined Alltech as marketing coordinator for their international headquarters.
- ▶ Lucio Scaratti has been elected new president of FEDIAF, the European Pet Food Industry Federation.
- ▶ Megazoo is planning four new stores in Austria, of which the first is scheduled to open in November 2008.
- ▶ Amlan International has hired Fang Chi, PhD, and Jonathan Broomhead, PhD, to focus on worldwide technical support and new product development.
- ▶ Dr. Hui Zhu, PhD, has joined Specialty Enzymes and Biochemicals Co. as laboratory manager.
- ▶ Mettler-Toledo has hired Rick Bollinger as the strategic accounts manager.
- ▶ Nano Pet Products LLC has expanded distribution into Canada.

## Petfood Forum 2009 call for abstracts

Petfood Forum 2009 organizers invites the submission of abstracts for noncommercial oral and poster presentations in the following topic areas:

- ▶ Nutrition and ingredients;
- ▶ Packaging;
- ▶ Safety and regulatory issues;
- ▶ Processing and production subjects;
- ▶ Market data, trends and predictions;
- ▶ Company profiles; and
- ▶ New products.

Abstracts will be reviewed for content, relevance and adherence to abstract guidelines. No abstract may be submitted that will have been published or presented prior to the Petfood Forum 2009.

Abstracts must be written in English, be no more than 300 words, and fit on one

page. Abstracts must be received no later than September 30, 2008. Send abstracts to: [tphillips@wattnet.net](mailto:tphillips@wattnet.net).

Organize the body of the abstract as follows:

- ▶ The purpose of the presentation.
- ▶ A concise list of 3-5 useful “take-home points.”
- ▶ Information presented in sufficient detail to support the conclusions and “take home points.”
- ▶ A 50-100 word biography of the potential presenter. Please cite public speaking experience.

Petfood Forum and Focus 2009 takes place April 20-22, 2009 in Chicago, Illinois, USA. For more information, visit [www.petfoodindustry.com/PFFinstructions.aspx](http://www.petfoodindustry.com/PFFinstructions.aspx).

## Menu Foods returns to profit as sales rise

Menu Foods Income Fund in August reported its first quarterly profit since 2006 as it worked to rebound from last year’s tainted petfood recall. Menu Foods made C\$735,000 (US\$694,000), or 2.5 Canadian cents a trust unit, in the second quarter, up from a year-earlier loss of C\$3.6 million (US\$3.4 million), or 18.9 Canadian cents a share.

The Mississauga, Ontario-based company said revenue rose to C\$60.3 million (US\$56.6 million) from C\$47.2 million

(US\$44.3 million) in the second quarter of 2007, when sales suffered from a massive recall that began that March, following reports of animal deaths. “While the 2007 recall is now largely behind us, its impact on our profitability and on our leverage ratios will be felt for some time to come,” CEO Paul Henderson said in a statement.

The trust’s units, which have risen 74% this year, but are down 84% since the scandal hit, were up 1 Canadian cent at C\$1.15 (US\$1.08) on the Toronto Stock Exchange.

## Updated 2008 Buyer’s Guide online

The information for a few companies listed in “Supplier Contacts” (July issue) was incorrect. All have been corrected online at <http://www.directorypub.com/PET/>. *Petfood Industry* regrets the errors.

***Check the online Buyer’s Guide for regular updates!***

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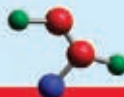
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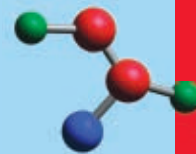
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## Nature's Variety forms council to provide consumers with insight

"Just like humans, pets require a variety of foods in order to obtain the optimal level of nutrition from their diet," said Dr. Susan Lauten, a clinical instructor of veterinary medicine. Experts like Dr. Lauten agree that the ideal diet for dogs and cats includes rotation between proteins (e.g., beef, chicken, salmon) and forms (dry kibble, wet and raw frozen petfood). Known as the Rotation Diet, this feeding philosophy, which can be implemented on a daily, weekly or monthly basis, is centered on nutritional variety and provides pets with optimal nutrition, according to Nature's Variety. Rotating proteins and forms supports overall health, including weight control, better hydration, a reduced risk of food intolerances and an overall improvement in cat's and dog's behavior and physical well-being.



A council of nationally respected pet experts has partnered with Nature's Variety to promote the Rotation Diet. The Nature's Variety Pet Nutrition Council is made up of five experts in the areas of pet nutrition, behavior and medicine who will act as helpful resources for pet owners who are interested in starting their pets on the Rotation Diet. In order to increase understanding among pet owners, Nature's Variety is launching a comprehensive program surrounding the Rotation Diet. The program, which will provide curious pet owners with a thorough explanation of the diet, as well as tips for introducing it to pets, was developed by the Pet Nutrition Council members.

## Mars Petcare recalls dog food

Mars Petcare US, the company that also manufactures the recently scrutinized Nutro line of dog food, recalled 100 of its 20-pound bags of Pedigree Complete Nutrition Small Crunchy Bites. The recall is a result of a logistical error, according to the company. Mars said it issued the recall after a component of the food that tested positive for *Salmonella* was inadvertently shipped to its Tracy, California, USA-based plant. The food was supplied to Albertson's supermarkets and sold in Southern California and the Las Vegas, Nevada, areas. Mars has notified the supermarket chain and is also cooperating with FDA on the recall. The affected bags have "best by" dates of July 7, 2009. No illnesses—pet or human—have been reported, as of press time.

Think of what you want to accomplish

Identify your goals

Establish your timeframe

We'll take it from there



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# PETFOOD INDUSTRY GLOBAL

## **Selling petfood in Saudia Arabia may have just gotten more difficult.**

Walking a dog in the park is a sure babe magnet. Saudi Arabia's Islamic religious police, in their zeal to keep the sexes apart, want to make sure the technique doesn't catch on. The solution: Ban selling dogs and cats as pets, as well as walking them in public. The prohibition went into effect last month in the capital, Riyadh, and authorities in the city say they will strictly enforce it unlike previous bans in the cities of Mecca and Jiddahs.

Violators found outside with their pets will have their companions confiscated by agents of the Commission for the Promotion of Virtue and the Prevention of Vice. The commission's general manager, Othman al-Othman, said the ban was ordered because of what he called "the rising phenomenon of men using cats and dogs to make passes at women and pester families," as well as "violating proper behavior in public squares and malls."

**Pet Valu rises to highest on acquisition proposal.** Pet Valu Inc., a Canadian petfood retailer, rose to the highest price in Toronto trading after saying it was approached about a possible acquisition. The Pet Valu board will consider the unsolicited offer with the advice of its financial and legal advisers, Ontario-based Pet Valu said in a statement.

The owner of about 340 shops in Ontario, Manitoba, and the US has a market value of C\$137.5 million (US\$131.9 million). Shareholders elected a new Pet Valu board in May 2008 after Goodwood Inc., a firm that owned about 20% of the retailer's stock as of March 14, 2008, pressured executives to expand its store network. Pet Valu rose C\$1.24 (US\$1.19), or 9.7%, to C\$13.99 (US\$13.42), the highest since at least 1993, when it sold shares to the public on the Toronto Stock Exchange. The stock has gained 7.6% this year.



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## PFI conducts petfood course at veterinary convention

The Pet Food Institute (PFI) conducted a half day course on the complexities of petfood at the recent convention of the American Veterinary Medical Association (AVMA). The course examined the functional uses for various ingredients, provided an overview on manufacturing processes and explained the stringent regulations that apply to petfood manufacturing, ingredients and labeling. Presenters were Nancy K. Cook, vice president of PFI; Dr. Angele Thompson, president of Thompson's Pet Tech; and Dr. William Burkholder, petfood specialist of the Center for Veterinary Medicine, Food and Drug Administration.



“The AVMA course provided a foundational overview on petfood that one cannot easily gain from reviewing published literature or perusing the Internet,” said Cook. “We demonstrated petfood’s long history of safe use and dispelled the common misconception that some petfood ingredients are used as fillers. Those veterinarians who attended the session now understand that every ingredient serves a nutritional or functional purpose, and many ingredients serve multiple functions.”

As part of the convention, PFI president Duane Ekedahl also participated in a separate panel on the petfood recall of 2007.

### Find more industry news and information

You can always find the latest petfood industry happenings at [www.petfoodindustry.com](http://www.petfoodindustry.com).

# INDUSTRY CALENDAR

## September

S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

### AFIA Liquid Feed

**Symposium**, September 10-12, 2008, Doubletree Hotel, Austin, Texas, USA. Contact: Judy Pilgrim, Tel: +1.703.524.0810, Fax: +1.703.524.1921, afia@afia.org, www.afia.org.

**Pet South America**, September 17-19, 2008, Transamerica Expo Center, Sao Paulo, Brazil. Contact: Miryam Tolotto, Nielsen Business

Media Brasil, Tel: +55.11.4613.2014, Fax: +55.11.4613.2001, miryam.tolotto@nielsen.com, www.petsa.com.br.

### National Annual Pet Industry Trade Show

September 21-22, 2008, Toronto, Ontario, Canada. Contact: Pet Industry Joint Advisory Council - Canada (PIJAC), Tel: +1.613.834.2111, Fax: +1.613.834.4854, executiveoffice@pijaccanada.com, www.pijaccanada.com.

**Glee PetIndex**, September 21-23, 2008, NEC, Birmingham, United Kingdom. Contact: Emap Limited, Tel: +1.44.0.20.7728.4262, Fax: +1.44.0.20.7728.4200, glee@emap.com, www.gleebirmingham.com.

**AACC Annual Meeting**, September 21-24, 2008, Hawaii

Convention Center, Honolulu, Hawaii, USA. Contact: AACC International, Tel: +1.651.454.7250, Fax: +1.651.454.0766, meeting.aaccnet.org.

**SuperZoo West**, September 24-26, 2008, Mandalay Bay Convention Center, Las Vegas, Nevada, USA. Contact: World Wide Pet Industry Association (WWPIA), Tel: +1.800.999.7295, www.wwpia.org.

**Practical Short Course on Aquaculture Feed Extrusion, Nutrition and Feed Management**, September 28-October 3, 2008, Texas A&M University, College Station, Texas, USA. Contact: Mian N. Riaz, PhD, Tel: +1.979.845.2774, Fax: +1.979.458.0019, mnriaz@tamu.edu, www.tamu.edu/extrusion.

## October

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19	20	21	22	23	24	25
26	27	28	29	30	31	

### PFI Annual Meeting

October 1-2, 2008, Chicago, Illinois, USA. Contact: Pet Food Institute, Tel: +1.202.367.1120, Fax: +1.202.367.2120, info@petfoodinstitute.org, www.petfoodinstitute.org.

**Nestlé Purina Nutrition Forum**, October 2-4, 2008, St. Louis, Missouri, USA. Contact: Dorothy LaFlamme, Tel: +1.540.745.2841, dorothy.laflamme@rdmo.nestle.com, www.purinavets.com.

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

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## Celebrities endorsing lines of premium and organic dog food

Popular television host and home-cooking chef Rachael Ray has launched her own dog food brand named Rachael Ray Nutrish, from

Dad's Pet Care Inc. Ray says her latest venture was inspired by her own dogs, and proceeds are to be donated to Rachael's Rescue, an organiza-



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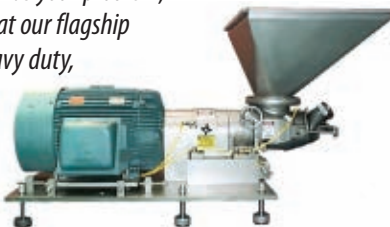
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tion the food star founded to help at-risk animals find adoptive homes.

According to Ray's website, Rachael Ray Nutrish includes two varieties of all natural dog food featuring real meat as the first ingredient—Real Chicken & Veggies and Real Beef & Brown Rice. There are no by-products, fillers, artificial flavors or preservatives, according to the website. Each recipe contains antioxidant nutrients like vitamin E and selenium to support a healthy immune system; a fiber blend including oatmeal for easy digestion; omega fatty acids, with a dash of EVOO (extra virgin olive oil) to support healthy skin and a shiny coat; high quality proteins to support healthy organs and lean muscle mass; and calcium for strong bones and healthy teeth.

Cesar Milan, well-known dog behavior specialist and star of National Geographic Channel's *Dog Whisperer with Cesar Milan*, has partnered with Petco to brand "Dog Whisperer" merchandise for dogs, including organic dog food, treats and other products and accessories. Among the products in Cesar's Dog Whisperer line are organic canned and dry dog food, treats, fortified water, liquid supplements, collars and leashes, toys, grooming products, training pads, stain and odor removers, beds, bowls and an instructional series of DVDs. The line is expected to include more than 100 products. Additionally, Petco.com will offer access to an exclusive online dog coaching course personally designed and developed by Cesar Millan to instruct owners on raising a happy, healthy and well-balanced dog.

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## « Health-consciousness inspires new Friskies line

Friskies Selects Indoor, which, according to Friskies, features quality ingredients and healthy benefits for indoor adult cats including promoting healthy weight and hairball control, began shipping in June 2008. The new line of wet cat food features eight “Select” recipes that are reminiscent of entrées prepared from scratch. Each entrée showcases the inclusion of grains and greens. Friskies states that the recipes are made with real salmon, turkey, chicken, beef or ocean whitefish, and are inspired by the way health-conscious consumers live and eat today. [www.friskies.com](http://www.friskies.com)

## All-natural liver cookies »

Waggin’ Tails offers liver cookies for dogs, both with grain and without it. According to the company, no by-products are used in the creation of the cookies, and all cookies are made in a human-grade bakery with human-grade ingredients. To provide maximum quality, Waggin’ Tails ensures all of the ingredients used in its cookies are from local markets and restaurant supply distributors. [www.waggingtailscookies.com](http://www.waggingtailscookies.com)



## « K9 dog treats bring a healthy combination

Gourmet Pawpourri dog treats from K9 Confections is a combination of the entire line of flavored dog treats the company offers including peanut butter, pumpkin biscotti, salmon sweet potato, vegetarian, breath fresheners, beef and bacon. According to K9 Confections, ingredients used in the treats are organic and all-natural without using any salt, sugar or preservatives. [www.k9confections.com](http://www.k9confections.com)

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## New recipe from the Honest Kitchen >>

The Honest Kitchen has recently debuted its newest recipe, Keen for dogs. According to the company, the petfood is human-grade quality and contains all-natural ingredients including dehydrated USDA-approved turkey, certified organic oats, potatoes, certified organic flax, carrots, cabbage, alfalfa, certified organic kelp, honey and garlic. In addition, the Honest Kitchen asserts Keen contains no glutenous grains but is instead formulated with whole organic oats, which are considered low gluten. [www.thehonestkitchen.com](http://www.thehonestkitchen.com)



## << Delight in cat treats

Pure Delights from Wellness are meaty bits of jerky designed as treats for cats. Available in the flavors of Beef Jerky, Chicken & Lamb Jerky, Turkey & Salmon Jerky and Turkey Jerky, the treats contain 1 to 1.2 calories, more than 90% pure meat, select all-natural ingredients and are grain free, says the company. [www.wellnesspetfood.com](http://www.wellnesspetfood.com)

## Jerky treats for dogs >>

Evanger's Dog and Cat Food Company has launched a new dog treat product, Nothing But Natural Jerky Treats. According to Evanger's, the jerky treats are prepared without artificial colors, flavors or preservatives. Coming in four different flavors, the treats contain select cuts of naturally raised poultry, game or meat, with fresh ingredients like blueberries, carrots and peas added in, says the company. [www.evangersdogfood.com](http://www.evangersdogfood.com)



## << New dog food with natural prebiotic

Nature's Gift has recently launched a dry dog food that contains a natural prebiotic, Biogestion5. Biogestion5 has been scientifically proven to improve taste and palatability, maintain immune system efficiency and increase protein metabolism, says the company. Nature's Gift claims the dry food with Biogestion5 is the first complete petfood that supports and maintains the digestive tract as well as delivers all the essential nutrients for a dog's health while being palatable. [www.naturesgift.com.au](http://www.naturesgift.com.au)



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## Feedback

# AFIA's safety certification

**Y**ou mention a presentation by Dr. David Rosenblatt, at the Petfood Focus on Safety event, in "Editorial Notes" (June 2008). We wish to augment your comments. You refer to a number of "safety" programs, most of which appear to be European.

The American Feed Industry Association's (AFIA) Safe Feed/Safe Food certification program (SF/SF) should be included on that list, as an American program in its fourth year of operation. You can learn more about the program at <http://www.afia.org/afia/SFSF.aspx>.

The SF/SF program was designed and implemented by a range of industry experts to highlight the best safety practices used by the entire animal food industry. Observers from the Associa-

tion of American Feed Control Officials and the Food and Drug Administration (FDA) were on the initial SF/SF task force. Among the SF/SF-certified facilities are those producing petfood, and the program is moving to comply with FDA-suggested recommendations for third-party certification programs.

The SF/SF program also has been praised by more than one FDA official, one of whom said, "AFIA is ahead of the curve in this crucial area. This direction simply makes sense since FDA cannot do it alone."

In addition, we are aware that certification is likely a risk mitigation factor that FDA will use to determine inspection resources. It's clearly possible that certified facilities will see fewer inspections, and those that are inspected will

likely see shorter inspections.

In the near future, AFIA will release a program for animal food that will fully comply with the European Union's feed hygiene regulation (EC) 183/2005.

AFIA believes our efforts to continuously upgrade the SF/SF program based on industry and FDA suggestions will result in more firms recognizing the importance of these types of programs. We appreciate your editorial and Dr. Rosenblatt's work calling attention to this most basic and important area of the animal food industry. ●

---

*Joel G. Newman  
CEO and president  
American Feed Industry Assn.  
Washington, DC, USA*



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Located in Sant Cugat del Vallés, Spain, Affinity Petcare's headquarters are the hub for company offices all over Europe.



Relying on expanding distribution, global leader Affinity Petcare SA focuses on its mission to ensure the well-being of cats and dogs worldwide

# Affinity for growth

BY JESSICA TAYLOR BOND

## Business basics

### World headquarters:

Sant Cugat del Vallés, Spain

### Main plants/facilities:

El Monjos, Spain;  
La Chapelle  
Vendôme and  
Moulins, France

### Officers:

Mario Franques,  
markets managing  
director; Joan Sanahuja,  
VP marketing; Franc Andreu,  
operations managing director;  
Frances Blanch, VP R&D

### Brands:

Affinity, Ultima, Brekkies, Brekkies  
Excel, Advance, Advance Veter-  
inary Diets, Premium Dog, Rubadub  
(treats)

### Total turnover (2007):

EU€299 million (US\$466 million)

### Website:

[www.affinity-petcare.com](http://www.affinity-petcare.com)

**Employees:** 750



Founded in Spain in 1963, Affinity Petcare—part of the Agrolimen Group of companies, leading manufacturers of consumer goods in Europe—has been striving to produce novel, healthy products for pets for more than 40 years. Ranked number six in our annual list of the top 10 petfood companies for 2008, the company offers a wide range of products, from special veterinary diets to superpremium foods to value-priced products for cats and dogs. Affinity says it is committed to the following values: imagination, innovation, flexibility and a scientific, systematic approach.

### Staking claims

Affinity products are distributed mainly in the European Union, but the company is building a distributor network within the fast-growing Eastern European petfood market, too. Russia, Turkey and Ukraine now carry Affinity products, and petfoods are even available in specialty stores in countries such as Israel and Kenya.

The company has many growth

opportunities in terms of geographic expansion and hopes to extend its presence in other markets having high pet ownership concentrations.

Besides expanding distribution, Affinity's growth strategy is based on new product development and strong promotion efforts, according to markets managing director, Mario Franques. "We have introduced nine new varieties for cats and four for dogs in different European coun-



Affinity Petcare has three plants in Europe with a total manufacturing capacity of 334,000 tons.

## We would like to be known as the company that better understands the relationship between pets and pet owners.

tries in the last 12 months,” he says. “Our keys to growth are that we have new and innovative products, and that we are focusing our efforts in geographical areas in Europe where dry products are growing the most.” The company is already the leader in Spain in total market and dry petfood with shares above 40% and is making considerable gains in countries like France, Germany and Italy.

“Despite our relative size—we operate in a limited area, the European Union—and that we are focused on dry products,” continues Franques, “we still have big opportunities to grow through increased distribution in this area.” In countries where it is not yet ahead of the rest of the petfood pack, Affinity relies on the appeal of its packaging, the sound nutrition of its diets and its products’ palatability to entice pet owners and their pets.

### Viva variety

“We would like to be known as the company that better understands the relationship between pets and pet owners,” explains Joan Sanahuje, VP of marketing. “This understanding and knowledge is a key to producing the highest quality products that better fit each target owner, with superior nutrition, superior palatability and ground-breaking products.” This past year, the company has introduced a plethora of products for both dogs and cats focusing on these fundamentals, including:

- ▶ **Brekkies Excel Tender & Delicious.** The dry premium line for dogs, which includes tender, easily chewable particles, has been enlarged with chicken and lite turkey flavors for overweight dogs;
- ▶ **Ultima Cat Sterilized & Ultima Dog Sterilized.** A specially formulated superpremium dry food for spayed and neutered cats and dogs;
- ▶ **Ultima Cat Shine & Beauty.** Super-

- premium cat food developed to improve overall skin and hair health;
- ▶ **Ultima Cat Senior.** Superpremium dry diet for cats more than 7 years old; and
- ▶ **Ultima les Repas Equilibre.** Dry superpremium line for dogs sold in the French market, has launched the variety Bucco-Dentaire, which helps prevent tartar and gingivitis.

Not to mention Affinity’s dry premium Brekkies Excel line for cats, that has recently been enlarged with a new line: Brekkies Excel Cat Original. The line has been developed following the natural concept,



**Ultima and Advance Veterinary Diet products for dogs and cats have been performing well in the European superpremium market.**



according to Sanahujes: The product has no artificial colorings or preservatives. Two different flavors—fish and meat—have been launched.

“Ultima dry products are performing very well in all markets,” says Sanahujes. “Brekki's Excel Original is also growing in distribution. Brek-

kies Excel Dog Tender & Delicious line is seeing a lot of success in Spain, France and Italy, and has just been launched in Germany.”

### The great beyond

Despite the current situation with rising ingredient costs—Affinity has

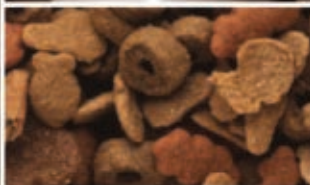
**We have introduced nine new varieties for cats and four for dogs in different European countries in the last 12 months.**

been forced to increase its own prices to keep up—the company expects to close with US\$600 million retail dollars this year. That implies a growth of 15% over last year's profits, according to Franques. He estimates Affinity will close 2008 with retail sales of US\$595 million.

“Our main challenge is to keep the double digit growth we have achieved in the last few years,” he says. “This growth has contributed value to all chains: from suppliers, to retailers, to pet owners.”

Affinity attests that it is the next real challenger in the petfood category. With plenty of years of experience in the industry and the kind of success to make even larger manufacturers take notice, Affinity Petcare seems poised to keep running with the big dogs in the future. ●

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# Is petfood recession-proof?

## US pet owners don't seem to be cutting back much on petfood spending

BY EMILY WOON

© Orvalo. Image from BigStockPhoto.com

**A**pparently US pet owners are not cutting back much on petfood spending. The only categories showing a drop in volume are mid-priced and economy dog foods and economy cat foods. Given the troubled economy and gas prices, it doesn't seem logical. Maybe because petfood buying is becoming more and more emotional—combined with US pet owners focusing more on quality, taste and function rather than price.

### Profitability down

A sharp increase in raw material costs is hurting the short-term profitability of petfood manufacturers. However, the longer-term trend toward premiumization has not been undermined, at least in developed markets.

Although manufacturers are raising unit prices, the unavoidable lag between costs rising and those costs being passed on to consumers will inevitably undermine short-term mar-

gins. This lag has been lengthened by the unexpected severity of recent increases. In the first quarter of 2008, rising raw material costs increased Colgate-Palmolive's cost base (across its entire operations) by 3% to 4% more than the company had anticipated. As a result, in an April 2008 conference call on its results for the first quarter of 2008, the company predicted that its full-year gross profit margin would be flat.

Similarly, Meow Mix and Kibbles

'n' Bits manufacturer Del Monte is now predicting earnings per share for continuing operations in the range of US\$0.64-0.68 for the full fiscal year, below the consensus expectation of US\$0.77. It would be reasonable to anticipate that other petfood manufacturers will be similarly impacted, resulting in a softening of margins during the first half of 2008, before they recover later in the year.

### Value still outpacing volume

Some market researchers believe there is less price elasticity in the demand for petfoods than for human food, and the industry's latest sales figures are bearing this out. Like their counterparts in packaged food, petfood manufacturers are weathering a surge in raw material costs. With cereal prices rising sharply on commodity markets (wheat hit a record high on the Chicago Board of Trade in February, soaring above US\$10 a bushel), the cost of such petfood staples as

**Significant unit price increases have been introduced during recent months.**



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corn gluten meal, brewer's rice and wheat gluten are being pulled upward, and manufacturers must also cope with increasing energy and transportation costs. While it would appear that, on the whole, manufacturers are successfully passing on much of these increases to consumers, their short-term profitability is undoubtedly being affected.

## 21 trends

For Euromonitor's list of trends leading to 2012, visit [www.petfoodindustry.com/0809PETtrends.aspx](http://www.petfoodindustry.com/0809PETtrends.aspx).

According to Euromonitor International data, global petfood sales are likely to post value growth of 6.1% in 2008 to reach US\$52.8 billion, but volume growth of only 2.2%. While this indicates that the premiumization of the petfood market is continuing quickly, these figures do not represent a significant break with the medium-term trend—value growth has outpaced volume growth in petfood by more than 2:1 for most of the current decade—and significant unit price increases have been introduced during recent months.

### Price increase options

According to Michael Sapp, VP of dog and cat consumables at the US chain PetSmart, the cost of Hill's Science Diet dog food has risen by about US\$2 a bag to around US\$36 during the opening months of 2008. Some of its rivals have taken a more indirect approach by shrinking package sizes and leaving prices unaltered. Large bags of Purina Dog Chow have been reduced in size from 50 lbs. to 44 lbs. (or 22.5 kg to just under 20 kg), but the retail price at PetSmart has remained the same, at around US\$17. Similarly, Mars has reduced the size of its large Pedigree Complete Nutrition from 44 lbs. to 40 lbs. (or 20 kg to 18 kg), but its PetSmart price is unaltered at around US\$18.

In Asia-Pacific, the Hong Kong

**Table 1. US petfood retail sales: VOLUME**

Apparently US pet owners are not cutting back on petfood spending. The only categories showing a decline are mid-priced and economy dog foods and economy cat foods. A metric ton is equal to 2,204 lbs.

Source: Euromonitor 2008.

	2007	2008 (est.)	Year on year growth	
			2006-07	2007-08
Dog and cat food sales in metric tons	8,424,975.40	8,567,623.90	2.10%	1.70%
Dog food by price platform	6,441,690.20	6,559,756.50	2.2	1.8
Premium dog food	2,305,489.60	2,478,513.50	8.3	7.5
Superpremium dog food	478,062.40	512,136.30	7.5	7.1
Standard premium dog food	1,827,427.20	1,966,377.20	8.5	7.6
Mid-priced dog food	2,191,187.40	2,162,549.90	-0.9	-1.3
Economy dog food	1,766,483.10	1,732,841.30	-1.5	-1.9
Dog treats and mixers	178,530	185,851.80	4.5	4.1
Cat food by price platform	1,983,285.20	2,007,867.30	1.6	1.2
Premium cat food	655,554.50	675,272.50	2.3	3
Superpremium cat food	153,554.90	160,463.90	4.2	4.5
Standard premium cat food	501,999.60	514,808.60	1.8	2.6
Mid-priced cat food	759,604.20	778,034.90	4.6	2.4
Economy cat food	548,714.60	534,002.80	-3	-2.7
Cat treats and mixers	19,411.90	20,557.20	6	5.9

**Table 2. US petfood retail sales: VALUE**

Retail value sales for the different price categories (US\$ in 2008). The only categories that showed a decline were mid-priced and economy dog foods and economy cat foods.

Source: Euromonitor.

	2006	2007	2008 (est.)
Dog food by price platform	\$10267.5	\$10765.8	\$11269.1
Premium dog food	4283.6	4661.4	5062.9
Superpremium dog food	1205	1325.9	1439.5
Standard premium dog food	3078.6	3335.5	3623.4
Mid-priced dog food	2584.8	2590.6	2581.4
Economy dog food	1271.1	1260	1247.2
Dog treats and mixers	2128	2253.8	2377.6
Cat food by price platform	\$4866.4	\$5053	\$5232.2
Premium cat food	2401.7	2507.3	2626.8
Superpremium cat food	610.6	652.9	700.9
Standard premium cat food	1791.1	1854.4	1925.9
Mid-priced cat food	1450.1	1530.2	1587.5
Economy cat food	757.5	744.3	732.9
Cat treats and mixers	257.1	271.2	285

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## Revolution in dog food





## Price categories defined

Following are edited versions of Euromonitor's definitions for the various petfood price categories. Euromonitor allocates brands to price categories on a country by country basis—according to the local industry. One brand may be positioned differently depending on the country. The following definitions apply to the US.

**Superpremium:** These products are based on nutrition and health rather than palatability. This includes products that are designed for pet well-being and life stage and lifestyle-specific diets. Superpremium brands are sold primarily through specialist channels currently, although this has started to change with the launch of lams into the grocery channel in certain markets. This segment includes products to manage health conditions (such as diabetes, kidney failure and urinary tract disease). On average, priced at US\$1.27/lb. for dog food and US\$2.01/lb. for cat food.

**Standard premium:** Primarily available through grocery and mass merchant channels. This segment includes brands that are considered premium due to their higher price vs. other products in the channel. On average, priced at US\$0.82/lb. for dog food and US\$1.68/lb. for cat food.

**Mid-priced:** Includes all dog and cat food with a price positioning between economy and premium. Such products are typically sold through supermarkets/hypermarkets, mass merchant and other non-specialist outlets. On average, priced at US\$0.55/lb. for dog food and US\$0.91/lb. for cat food.

**Economy:** Includes all dog and cat food with an economy price positioning. Such products are typically sold in supermarkets/ hypermarkets, mass merchants and other non-specialist outlets. On average, priced at US\$0.32/lb. for dog food and US\$0.64/lb. for cat food.

**Treats and mixers:** Treats are those products marketed and fed not as the main meal, but as a reward or indulgence. Treats are increasingly offered with functional benefits, such as oral care and skin health.

Mixers differ from dry food in that they are positioned as a complement to wet food, while dry food is positioned as a complete meal. They may also have additional benefits such as being good for teeth but since this is not their core function, they should be considered as a mixer and not a dietary supplement product. Gravy is included in mixers. Treats and mixers are, on average, priced at US\$5.82/lb. for dog treats/mixers and US\$6.32/lb. for cat treats/mixers.

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market has seen even stronger price increases. Speaking in April, Tweety Tam, merchandising manager at the local chain Pet Central, said that a 2 kg package of dog food had risen by HK \$25 (US\$3.20) to HK\$170 (US\$21.76) during the previous month. According to Tam, some importers are exploiting rising costs “by drastically increasing the wholesale price.” With consumers in this region already concerned about rice shortages, this worry could easily spill over into petfood. Indeed, the fact that some products were out of stock for two months suggests at least a degree of panic buying.

### Logic + emotion

Consumers appear to be accepting these price increases in spite of declining real disposable income and falling consumer confidence. They are refusing to either trade down to cheaper brands or shift from more expensive wet to cheaper dry products. Due to deepening anthropomorphism, pet owners are becoming even more brand loyal. Many owners hold the view that their pets can tell the dif-

ference between different products and they are therefore reluctant to switch brands in case it upsets their pets' digestive systems. This process may well have been aided by the 2007 recall of tainted petfood, as many pet owners are now even more reluctant to feed cheap products to their animals as they perceive them as being possibly unsafe.

Against this background, the longer-term impact of rising prices (assuming that costs remain elevated) is likely to prove relatively benign, at least in developed markets. The trend toward premium and natural products, including organic and eco-friendly items, is both well established and robust. Moreover, if these cost increases prove to be short-lived (given there is a distinct possibility that recent commodity price rises are influenced by speculative capital), the long-term impact on margins could actually be positive, as recent consumer behavior indicates a willingness to choose petfood products on quality, taste and function rather than price.

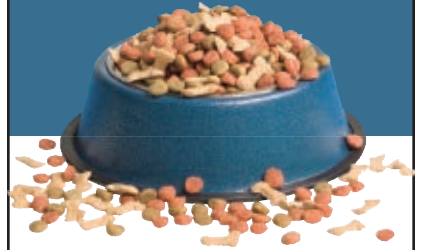
## Slowdown in developing markets

However, in developing markets, the longer-term impact of rising prices is likely to be more significant as it will inevitably retard the industry's maturation by slowing the substitution of packaged petfood for table scraps at the lower end of the market. As a result, Euromonitor International data shows that annual value growth of dog and cat food sales in China slowed from 8.5% in 2006 to a projected 7.3% in 2008. This may also create new opportunities for indigenous manufacturers (particularly those that source the bulk of their raw materials locally) to gain market share from their higher-cost foreign rivals, at least in the economy segment. ●

*Emily Woon is head of petfood and pet care products research at Euromonitor International. Contact her at Emily.Woon@euromonitor.com.*

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# Taste that innovates

Palatability enhancers take into account the specific feeding behaviors and taste perceptions of cats and dogs

BY JESSICA TAYLOR BOND

It used to be enough that petfoods met pets' tastes and their nutritional needs. But with the significant evolution of the global petfood market that has been accompanied by a strong premiumization trend, foods that are going to fly off shelves also have to answer to the pet owner's demand for the best quality, period. Petfood companies are now looking at how dogs respond genetically to a particular diet and how cats respond to different moisture content in kibble. Petfood manufacturers should spend a considerable amount of time conducting controlled feeding studies to determine the right combination of ingredients and processing techniques to produce a nutritious, palatable food.

## A compelling crunch

According to SPF, making a petfood downright delicious for dogs or cats is not only its core business, but a combination of varied expertise it has developed over time. SPF, according to the company, has always presented palatability performance as a result of a global approach, taking into account the palatability enhancer and its application for dry kibble, wet product or various forms of treats. This palatability system also includes studying the specific petfood formula and its manufacturing process, as these factors affect taste, texture and shape of the end product.

Today, SPF innovation is driven by fundamental research. Take for example, the identification of specific

aroma molecules, 10 years ago, that were particularly appreciated by dogs or cats. This discovery threw light on the importance of raw materials and of the very processes for palatability performance. Using this breakthrough as a starting platform, SPF continues to develop new technologies that support the creation of high level palatability enhancers with specific targeted compounds. For the future, understanding the physiology and mechanisms of pet perceptions and feeding behaviors are the key concepts to the science of palatability, as SPF sees it.

SPF chemists, flavorists, ethologists and food engineers are supported by the application team who are completely knowledgeable of petfood processes and are able to explain all

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**While manufacturers conduct trials to see what felines prefer, it's difficult to know exactly which flavors or textures the cats are responding to.**

the interactions that can occur in a sophisticated product like kibble. Through the Apicalis service, offered exclusively by SPF, this knowledge directly benefits the customer, who now has a team of experts and their advice and ideas to optimize petfood formulation.

### Focus on function

Functional palatants are flavors for petfood and treats that add additional nutritional value to the diets and can positively affect the health of companion animals, according to Dr. Chris Nelson of Kemin Industries Inc.

One class of functional ingredient is antioxidants. The oxidation of petfood will create rancidity and decrease the quality and nutritional value of the food. Antioxidants are molecules that sacrifice themselves rather than allow oxidation of the petfood. The addition of antioxidants to components of the food, including the palatant, can posi-





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tively and impressively impact the palatability of the food, according to Kemin.

Another example of a functional ingredient that can positively impact the health of cats and dogs, according to Kemin, is zinc propionate. Zinc is an important trace mineral in

companion animals, affecting skin, immune and dental health. The bio-availability of organic zinc as measured by plasma levels after zinc propionate supplementation is considerably increased when compared to that of inorganic zinc.

### Future on our forks?

Professor Gary Pickering, the chair and professor of biological sciences and wine science at Brock University in St. Catharines, Ontario, Canada, claims that he has discovered that human testers rated cat food successfully, ultimately benefitting cat food consumers. In a recent *Journal of Animal Physiology and Animal Nutrition* paper, Dr. Pickering explains the potential value of having people rate cat foods. For example, he believes it might enable manufacturers to understand why a cat favors certain foods. While manufacturers conduct trials to see what felines prefer, it's difficult to know exactly which flavors or textures the cats are responding to, he explains.

**The addition of antioxidants to components of the food can positively and impressively impact the palatability of the food.**

“Cats aren't very good at vocalizing what they like or don't like about cat foods,” said Dr. Pickering, who conducted the study in Australia before coming to Brock University. “The idea was that humans can quite clearly verbalize what it is. Humans can also rate the intensity of different characteristics in a particular food or beverage.” Dr. Pickering says the value of his recent work could lie in taking the results of the human testing and comparing them to results of cat testing on the same products. It might offer a

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shortcut for researchers, he says.

Testers rated the foods on 18 flavor attributes, including tuna, prawn, chicken, caramel, cereal, soy, burnt flavors, bitter and offaly. They also evaluated textures, such as grittiness and chewiness.

In response, Dr. Timothy J. Bowser, co-director of the Oklahoma State University Center for Pet and Animal Food Palatability Studies, says that while humans can play an

**Petfood companies are now looking at how dogs respond genetically to a particular diet.**

important role in cat food palatability development, the cats themselves are essential to the process. "Human input is sought first to evaluate odor, appearance, value and feel," says Dr. Bowser. "But we haven't ever asked anyone to taste cat food or any other petfood. The pets tell us everything we

## Online resources

[www.spf-diana.com](http://www.spf-diana.com)

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

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need to know through preference testing methods that are almost identical to the methods used on human foods. Getting the opinion directly from the pet is much more accurate than working indirectly through humans, in my opinion." ●

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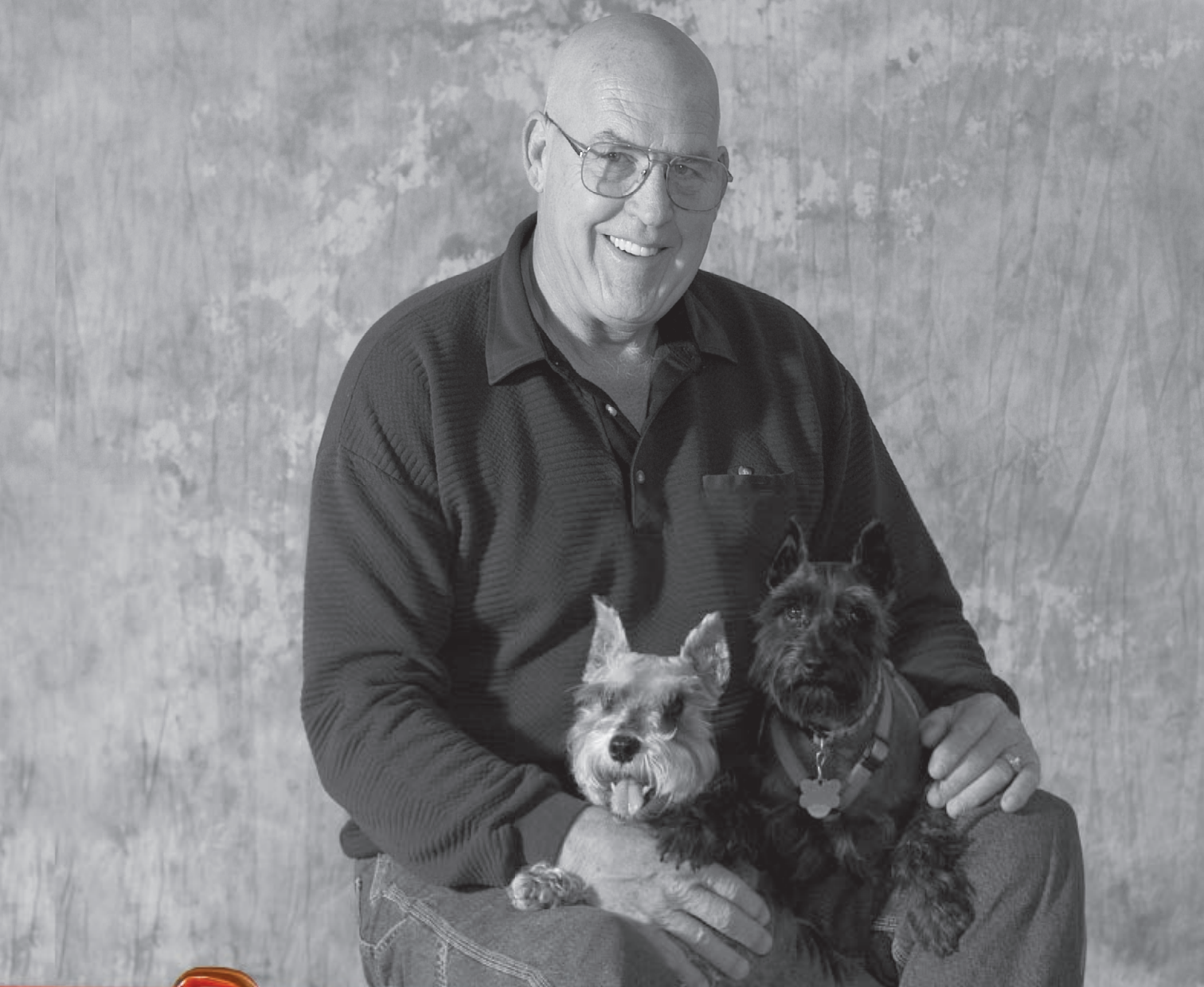
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# Packaging that

# POPS!

## Are your company's pet products causing consumers to 'paws' and take a closer look?

BY JESSICA TAYLOR BOND

**A**ccording to the American Pet Product Manufacturers Association (APPMA), the top two ways that pet owners find new products for their furry companions are browsing store shelves and watching television advertisements. What does this mean to companies wishing to make an impact in the ever growing pet market? Novel product and packaging development is the key to not only attracting new consumers,

but also plays an important role in continued brand loyalty.

### Be bold

Studies done by the APPMA and other pet consumer organizations indicate that petfood packaging follows many of the same trends as packaging for human food products. Brand differentiation, brand enhancement and convenience rate highly with consumers when selecting a brand of food

or pet care products, according to a recent report done by Weatherchem Corp. A package can really make or break a product in a market that is booming with new product introductions. With more than 700 new toys, treats and other pet-related products introduced alone in 2008 at the Global Pet Expo, making eye-catching, durable and downright imaginative packaging is becoming more crucial to selling petfood than ever.



Consumers are on the go and will pay for a product that's easy to store and use —convenience is key!



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**Neatly packed storage containers with a handle for carrying for petfood and treats are becoming very popular.**

“Innovative packaging will take advantage of the major trends we’re seeing in the petfood market today and utilize these trends to make packaging pop on the store shelf,” says Whitney Reichheld, product manager for Weatherchem. Reichheld cites the example of organic petfood. “Organic petfood is really popular, but there are so many lines of organic food that they all look the same due to the lack of inventive packaging.”

So who manages to stand out from the pack? Castor & Pollux’s Pet Organix created an “organic kit” that assembles organic treats and food into a neatly packed storage container with a handle for carrying. “This is innovative because it’s a new way of packaging an item that is so often packaged exactly the same way by 20 other organic petfood companies,” states Reichheld.

Innovation doesn’t always have to be something new or unique, it may just satisfy a need that other petfood manufacturers have managed to overlook, Reichheld also points out. “Always try to identify the unmet needs of your consumers,” she recommends. “The most innovative packaging will provide solutions to those needs.”



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## Focus on fun

A package will drive consumers to purchase a product and truly build loyalty for a particular brand if it is fun and easy to use with their pets. Ultimately, the pet is a fun part of the consumer's life and products that are enjoyable to use will be the bestsellers among pet owners, according to Reichheld.

It is essential that consumers have a positive experience with your brand the first time and the packaging is vi-

tal to making this happen. Pet owners are looking for their petfood packaging to communicate the following:

- ▶ **Is it a premium quality product?** Capitalize on the natural/organic trend and let consumers know your product uses human-grade ingredients, pioneering supplements or holistic vitamins and minerals.
- ▶ **Where is it made?** After last year's recalls, consumers are more concerned about where what their

## Online Extra!

Take a look at a gallery of photos of other innovative petfood and treat packaging from international companies, as well as read what Crown Holdings Inc. has to say about the diverse pet packaging market at [www.petfoodindustry.com/0809PETpackage.aspx](http://www.petfoodindustry.com/0809PETpackage.aspx).



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pet eats for dinner is coming from —Made in America labeling will get them to take second look.

- ▶ **Will it keep the product fresh?** Resealable, convenient and reliable packaging satisfies pet owners faster than their pets can wag their tails or start to purr.
- ▶ **Will it be easy to store and use?** Bulky, oversized bags are a thing of the past—think about stand-up pouches and compact tins or cans instead.
- ▶ **Is it fun?** Packaging can make a petfood product more fun for the owner if it reflects a part of their personality or lifestyle.

### Keep track of trends

There are some major trends in the petfood market that influence the direction petfood packaging is taking. Take, for example, the humanization of companion animals; pets deserve products that are human-grade and packaging needs to communicate that premium quality message.

“Don’t underestimate a convenient package,” says Reichheld. “Consumers are on the go and will pay for a product that’s easy to store and use.” Fancy Feast Canned Food Variety Pack from Nestlé Purina takes advantage of this concept. The cans come in



Natura Pet Products views packaging as one of the most important elements in consumer communication. Packaging graphics and copy clearly display ingredient declarations and feeding guidelines.

a cardboard box that have a handle for carrying and a dispensing chute that opens for easy access with just the tear of a strip. Additionally, the can itself has a pull-tag that eliminates the need for utensils, which makes serving the cat a gourmet meal simple and clean, according to the company.

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**Brand differentiation, brand enhancement and convenience rate highly with consumers when selecting a brand of petfood.**

Another example of packaging on trend is Natura Pet Products' EVO dog food line. Natura views packaging as one of the most important elements in consumer communication. In addition to the ingredient declaration and guaranteed analysis, the packaging graphics and copy for the EVO packaging clearly communicate brand positioning, benefits to the dog's health and comprehensive feeding guidelines.

"With so many different petfoods to choose from, it has become increasingly difficult for retailers and their pet-owning customers to determine which petfoods are actually 'healthy' for their pets," says Amanda Hassler, PR for Natura. "We believe the way to help retailers sell our products is to share as much nutritional information as possible on each and every product package. This way, consumers know exactly what's in every bag."

Consumers are starting to read in detail the labels of their own food and this has definitely extended into their shopping habits for their pets. Consumers are also becoming more health savvy for themselves and this extends to their pets as well. Pet vitamins and nutritional foods are two of the fastest growing segments of our industry and packaging can help your brand stand out. ●

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# Surprise at AAFCO annual meeting

**T**he 2008 Annual Meeting of the Association of American Feed Control Officials (AAFCO) was held August 1-4 in Nashville, Tennessee, USA. During the general session, where the AAFCO membership as a whole votes on the recommendations made by the various committees over the past year, something unexpected happened.

## Years of work gone?

The general session involves proposals that most often have been fully deliberated by their respective committees, so typically the membership understands and embraces them by the time they reach this stage.

Thus, it was surprising when the members voted to deny acceptance of the new Policy Statement #29 (PS 29). This policy would have allowed petfood companies to make specified informational statements about the physiological role of nutrients from ingredients in a petfood without necessitating a label guarantee for that nutrient. The Pet Food Committee (PFC) and Model Bill

**The board considered the policy tantamount to condoning false and misleading labeling.**

**Members voted on several measures—with one unexpected outcome.**

— David Dzanis



and Regulations Committee (MBRC) had deliberated the issue for many years before reaching a consensus.

As I understand it, the AAFCO board of directors considered the policy as proposed tantamount to condoning false and misleading labeling. They recommended rejection, and despite appeals from the Pet Food Institute and the American Feed Industry Association, the membership followed the board's direction. So, after all the years of hard work, PS 29 dies unless a committee picks up the gauntlet and tries again.

## First step to carb claims

In other matters, the AAFCO membership did accept:

- ▶ The amendment to the definition for *Yucca schidigera* extract to specify its limitations (for all animal feeds at no more than 125 ppm, but post-excretion manure odor control claims for poultry and livestock feeds only);
- ▶ Sodium hexametaphosphate as a coating for dry petfoods to help reduce dental tartar accumulation; and
- ▶ The proposed feed terms “sugars” and “fructans.”

Based on feedback from the Laboratory Methods and Services Committee, the feed term “starch” was rejected. It was returned to the Ingredient Definitions Committee to address the con-

cerns raised. These three definitions—for sugars, fructans and starch—are the first step to a means to allow carbohydrate-related label claims on animal feed (including petfood) labels.

Last, but certainly not least, the members accepted the proposal to include “pizzles” among other animal body parts (hides, bones, ears, snouts) expressly exempt under Policy Statement #27 from AAFCO labeling and registration requirements (provided specified conditions are met). But these parts are still food under federal law.

## Updates on treats, milk

Within the PFC session, the Small Pet Food/Treat Manufacturers Working Group filed a report on its progress, which to date has consisted of collecting information for the group's consideration. Its ultimate charge is to make recommendations regarding means to educate small businesses such as local bakeries and treat manufacturers that are not aware of state registration and labeling requirements on how to comply, as well as possibly suggest means to make it easier for these entities to comply.

The Weight Related Terms and Calories Working Group did not file a report but did hold a brief meeting immediately after the PFC session to discuss its strategy for future deliberation. With luck,

it will make recommendations regarding proposed amendments to Model Pet Food Regulations PF9 and PF10 in time for the AAFCO January 2009 (also known as the mid-year) meeting.

There was little to report from the AAFCO Profiles and Protocols Expert panel, except a lot of work going on in the background. The same comment was made in regard to progress in the Food and Drug Administration's (FDA) response to the FDA Amendments Act of 2007. In both cases, it is hoped there will be more tangible progress to report by January. The one point of progress within the PFC was with the Raw Milk Working Group, which completed its task to review and make recommendations on proposed language that would put labeling and other restrictions on raw milk products sold as petfood.

### Measurement matters

The MBRC accepted the language for amendment of PF2(a)(3), and it now goes to the board. If accepted by the members next year, it would specify both *avoirdupois* (e.g., pounds/ounces for weight, or quarts/pints/fluid ounces for volume) and equivalent metric units in the net content statement. While these requirements have been in a proposed rule by FDA for over a decade, they have never been finalized at the federal level.

In the Ingredient Definitions Committee, glutamic acid was accepted for use in animal feeds and petfoods as a flavoring agent only, not to exceed 400 ppm. There was discussion but no action on a proposal to allow chicken feet in the definition for chicken meal. The wheat products investigator reported progress in developing a definition for wheat gluten and hydrolyzed wheat protein.

The January meeting will be in Tuc-

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son, Arizona, USA, while the next annual meeting is scheduled for Washington, DC, USA, in August 2009. AAFCO's first meeting was held in the US capital

in 1909, so the association is planning special events to commemorate its 100th anniversary. Details for all will be posted soon at [www.aaeco.org](http://www.aaeco.org). ●

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## Textured vegetable protein: all about appearance

**T**extured vegetable protein (TVP), the meat extender we loved to ridicule in our school lunches, may be more prevalent in petfood than many realize. It isn't being used to stretch the meat budget or even to supplement meat protein. Instead, the most common application for TVP in petfoods is cosmetic. It makes for a great visual effect in canned foods, making them look more like real meat.

It's not a cost-cutting matter. As it turns out, in a wet petfood application, a TVP "meat piece" does a better job of distinguishing itself as a "meat chunk" than an actual chunk of chopped or reformed meat. The reason for this is because TVP retains its shape, coloration and distinct outline during retort. So, one can discern with just a glance that there is a real difference between this virtual meat chunk and its surroundings. It is especially true for the chunk in loaf product formats in which a meat piece is embedded in a meatloaf or paté.



**A TVP "meat piece" does a better job of distinguishing itself as a "meat chunk" than an actual chunk of chopped or reformed meat.**

*Photo courtesy of ADM Alliance Nutrition Inc.*

**It makes for a great visual effect in canned foods.**

— Greg Aldrich



### Appearance matters

So, it appears that petfood isn't solely about nutrition. It does have its shallower side in which appearance matters. While this might give purists indigestion, the application of TVP chicken-analog pieces in a loaf product or beef-analog pieces in a lighter colored chicken based meatloaf is pretty popular in the canned dog food market. The technology is also deployed in numerous overseas markets without shame.

While it may be assumed that wet petfoods are predominantly meat based and this infiltration of vegetable proteins into these products might seem like heresy, their popularity would indicate that it is an effective method to deliver the visual experience desired by the pet owner. So, if TVP is so common, then what is it and how well does it perform with our pets?

### What it is

According to the *AAFCO Official Publication* (2008): "Textured Soy Protein Product is made from defatted soy flour mixed with water and/or steam, extruded and then dried."

While the products on the market are predominantly soy flour, depending on the application, cost, availability and desired appearance of the piece,

other proteins might also be included. Examples include small quantities of wheat gluten or more commonly flour from other edible beans (e.g., lima, pinto or navy). Thus, it is most often known and marketed as the broader "vegetable" protein, rather than exclusively as soy protein.

TVP came about during the 1960s as research to develop meat analogs met up with the expanding application of extrusion technology. In general, defatted soybean flour (soybean meal that has been ground really fine) is combined with processing aids (calcium chloride, sodium carbonate, sulfur) and colors (caramel color, FD&C red #3, etc.) in the preconditioning cylinder prior to extrusion.

### Extrusion and drying

For the production of TVP, extruders are commonly high-temperature, short-time single screw machines very similar to those used in the production of extruded petfoods. The actual development of texture occurs at the end of the extruder screw and during exit from the die as cellular proteins reorient or realign themselves into strands or fibers (Harper, 1978). These newly formed fibers are created when denatured protein molecules rupture and form new intermolecular peptide

bonds that then aggregate into fibrous subunits.

After conveyance away from the extruder, the pieces are dried to a moisture level of 6% to 8%. In the dried form, TVP is stable, with most suppliers claiming a shelf life of one to two years. The dry product is easy to handle and in canned formulas may be added at 1% to 15% depending upon the visual appearance desired.

The dry pieces rehydrate readily and will absorb two to three parts water per unit weight. After rehydration, the TVP piece is perishable and should be handled in a manner similar to that of meat. Thus, rehydrated pieces should be processed immediately or stored under refrigeration.

## Performance with our pets

Since the starting material for TVP is soy flour (also known as finely ground soybean meal), the nutrient composition should not be expected to differ substantially. TVP is sold at a crude protein of 50% or more. It contains approximately 1% fat, 3 to 6% ash and 3.5 to 5% crude fiber (about 15% total dietary fiber).

In a recent scan through the literature, no data reporting intake or palatability issues were found related to TVP. It is generally assumed the flavor and aroma of TVP is bland, and it will take on the sensory attributes of surrounding ingredients.

As for dietary effects in pets, several research studies have been published. Each study utilized the same

experimental diets in which dogs were fed canned foods that replaced beef with TVP at levels of 14, 29 and 57%. No health or nutritional anomalies were noted from these studies. However, relative to beef, dogs fed the TVP-containing diets had slightly lower nutrient digestibility, their stool volume increased and the stools were softer and more fluid (Hill *et al.*, 2000; Hill *et al.*, 2001).

It was also noted that insulin secretion in the first few hours following a meal was decreased for dogs fed the TVP diets (Hill *et al.*, 2006). This is most likely due to the oligosaccharide content of TVP and, if managed properly, could be a dietary tool in treating diabetes.

## Proving itself

TVP is a convenient, stable and effective means for achieving the appearance of meat pieces in wet dog and cat foods. At inclusion levels well

beyond those commonly used in pet-food, TVP has been shown to be safe, though a negative for stool consistency. Palatability or animal acceptability has not been identified as an issue, and at typical dietary levels TVP has minimal impact on digestion or stool consistency. So, while TVP may have an image issue with its name, it has proven itself in the categories of appearance and utility. ●

*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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**TVP retains its shape, coloration and distinct outline during retort.**

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## Homemade petfood: sizable market opportunity

It's no wonder mainstream petfood marketers and industry trade groups view the prospect of a consumer swing back toward home-prepared petfood as a threat. Petfood companies' success in building the US market to its current US\$16 billion level is the direct result of their marketing success in convincing pet owners that commercially prepared dog and cat foods are the most complete and balanced options, positioning their products as both more nutritious and convenient. With most pet owners in mature markets like North America on board, marketers are now employing this same strategy in developing markets with much success.

### Take a second look

But the petfood times are changing, and to such a degree that those against homemade petfood—or who dismiss it as not that important—may want to take a second look. With the US recalls of 2007, consumer winds shifted, with one result being a greatly intensified interest in product ingredients.

Another fact of life in today's petfood market is that high-income (US\$70,000 and greater) households account for more than half of US sales. Because these consumers tend to be well educated, the no-



With its dog food mixes, Sojourner Farms seems to view increasing consumer interest in homemade petfood as an opportunity.

tion that they are incapable of putting together a healthy meal for their pets—especially with all the new products and information resources out there to help them do so—is no longer credible.

The same holds true for the idea that pet owners going the homemade route, who tend to be the most informed, will suddenly stop feeding their beloved pets commercial diets and start plying them with dangerous table scraps instead.

### Larger than expected?

The truth is pet owners, often under the supervision of pet care professionals, have been preparing pet diets at home for years, and this market may be a larger than one might expect:

► In a Harris Interactive poll conducted online in November 2007, 23% of pet owners said they cooked for their pets frequently or occasionally. This tendency, not surprisingly, is higher

among females (27%).

- According to the American Pet Products Manufacturers Association's *2007-2008 National Pet Owners Survey*, 20% of dog owners and 12% of cat owners purchased human food for use as petfood during the previous 12 months.
- According to the American Animal Hospital Association's *2004 Pet Owner Survey*, 37% of pet owners reported fixing their pets special meals using human food, while 14% said they make petfood from scratch at least some of the time. Combined with other important

The other piece of the do-it-yourself puzzle is raw petfood.

trends in the petfood market—such as natural/organic fare and human-grade ingredients—statistics like these may suggest not a threat but an opportunity. One company viewing the situation as such is Sojourner Farms, whose upscale dog food mixes are made with human-quality ingredients and make it possible for pet owners to select their own meat source for fresh homemade petfood in record time.

### Also under the radar

The other piece of the do-it-yourself petfood puzzle—which, like homemade petfood, is experiencing above

#### Online resources

Sojourner Farms, [www.sojos.com](http://www.sojos.com)

Nature's Variety,  
[www.naturesvariety.com](http://www.naturesvariety.com)

Bravo!, [www.bravorawdiet.com](http://www.bravorawdiet.com)

Wild Kitty, [www.wildkittycatfood.com](http://www.wildkittycatfood.com)

Packaged Facts' report *Fresh Pet Food in North America*, [www.packagedfacts.com/Fresh-Pet-Food-1420439](http://www.packagedfacts.com/Fresh-Pet-Food-1420439)

average growth while still flying under the radar—is raw petfood, which is often the main meat component in homemade diets. Comprised mainly of lightly processed products sold in frozen form, the raw petfood segment is coming into its own as companies introduce complete diets that meet Association of American Feed Control Officials (AAFCO) guidelines, helping defuse the leading criticism of the mainstream veterinary community.

Spearheading the complete and

## With the US recalls of 2007, consumer winds shifted.

balanced raw petfood trend is Nature's Variety (Prairie), which urges pet owners to rotate between its raw/frozen, kibble and wet diets. In 2007 Bravo! (Balance) and Wild Kitty followed suit, the latter claiming that a number of its diets actually exceed AAFCO nutrient levels.

As Packaged Facts notes in its report *Fresh Pet Food in North America: The Raw/Frozen, Refrigerated and Home-made Wave* (July 2008), the trend toward homemade petfood is not expected to threaten commercially prepared petfoods anytime soon, but there could be solid market potential. "We fully expect to see a much wider selection of commercial petfood mixes, and not just in the small raw/frozen niche," the report says. "We believe major marketers will begin to tap into this market segment, if for no other reason than to hedge their bets as more pet owners seek out fresher options." ●

Information provided by Packaged Facts, [www.packagedfacts.com](http://www.packagedfacts.com).

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### ► Endurance in a pill

(*J. Cell* 2008.06.051):

Researchers have identified two drugs that mimic many of the physiological effects of exercise.

### ► Methylcelluloses reduce insulinemia

(*J. Nutr.* 138: 292-296):

The consumption of certain methylcelluloses reduced postprandial insulin blood levels consistent with delayed glucose absorption.

### ► Insulin resistance

(*J. An. Physiology and An.*

*Nutrition* 92:419-425): Obese dogs develop insulin resistance that is associated with high triglyceride levels.

## Endurance in a pill

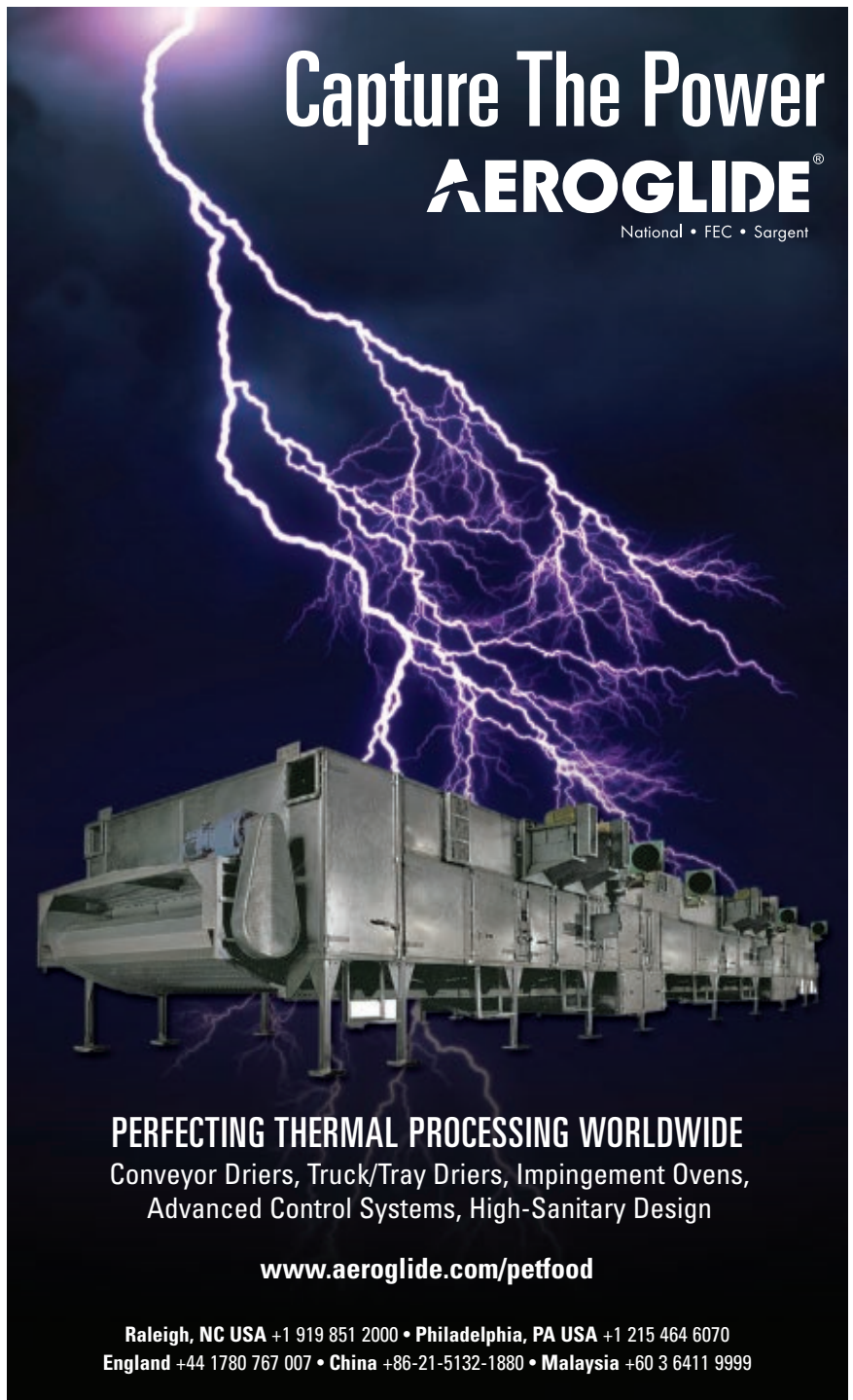
While anabolic steroids can help build the bulky muscles that provide power and speed, there hasn't been a drug capable of building the endurance needed to run a marathon. Now, there might be, suggests a new study in mice, published July 31, 2008, in an advance online publication of the journal *Cell*.

Researchers report they have identified two separate biochemical signaling pathways that are turned on in response to exercise—and artificially turning those pathways on in mice produced rodents with much greater endurance that were also able to use energy more efficiently. It's unknown if similar results would be seen in dogs, cats or people.

Researchers have identified two drugs that mimic many of the physiological effects of exercise. Both drugs can be given orally and work by genetically reprogramming muscle fibers so they use energy better and contract repeatedly without fatigue. Mice that were given AICAR, one of the two drugs,

ran 44% longer than untreated animals. The second drug had a more dramatic

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**Source:** V.A. Narkar, *et al.*, 2008. AMPK and PPAR agonists are exercise mimetics. *10.1016/J.Cell. 2008.06.051.*

## Methylcelluloses reduce insulinemia

Hydroxypropylmethylcellulose (HPMC) and methylcellulose (MC) are

modified cellulose dietary fibers that generate viscous solutions in the gastrointestinal tract. This study assessed the effects of high viscosity (HV) HPMC, ultra-HV (UHV) HPMC and medium viscosity MC on postprandial glucose and insulin responses in overweight and obese men and women.

After overnight fasts, subjects consumed five breakfast meals containing 75 g carbohydrate, each of which contained a certain HPMC/MC preparation. Glucose and insulin responses were determined premeal and for two hours postprandially.

Peak insulin was reduced for all HPMC/MC conditions vs. the control. Insulin was lower than the control after meals containing 2 g of HV-HPMC, 2 g of UHV-HPMC and 4 g of MC. GI symptoms did not differ among treatments. These findings indicate that HV-HPMC (1 and 2 g), UHV-HPMC (2 g) and MC (4 g) consumption reduced postprandial insulin blood levels consistent with delayed glucose absorption.

**Source:** K.C. Maki, *et al.*, 2008. Hydroxypropylmethylcellulose and methylcellulose consumption reduce postprandial insulinemia in overweight and obese men and women. *J. Nutr.* 138: 292-296.



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## Insulin resistance

In humans, obesity is closely associated with insulin resistance. The purpose of this study was to explore the effect of age on metabolic disturbances related to obesity in dogs (n = 25). Three age groups of dogs (puppies, young adults and mature adults) were overfed to induce obesity. Body composition, insulin sensitivity index (ISI) and plasma lipids were measured.

In mature adults, body weight (BW) increased (+45%, p < 0.001) and ISI decreased (-60%, p < 0.001) over 22 weeks. In young adults, BW gain was similar but slower (60 weeks) and ISI decreased to a lesser extent (-49%, p < 0.001). Overfed puppies weighed 30% more (p < 0.01) than normally fed control puppies, but there was no change in ISI. Unlike young and mature adults, obese puppies did not exhibit significant changes in triglycerides (TG) and free fatty acid concentrations.

As in humans, obese dogs develop insulin resistance that is associated with high TG levels. However, younger animals may be better able to balance energy needs with energy consumption.

**Source:** S. Serisier, *et al.*, 2008. Hypertriglyceridaemic insulin-resistant obese dog model. *J. An. Physiology and An. Nutrition* 92:419-425.

# Product News

## Norwood/Allen introduces ACF-400 Carton Coder

Norwood Marking Systems/Allen Coding Systems has introduced its ACF-400 Carton Coder. Revealed at Pack Expo, the ACF-400 is available with either thermal transfer or hot foil printing technology. Its off-line carton coder handles a wide range of cartons, sleeves, blister packs and leaflets from 0.1 to 6 mm thick with quick changeovers, states the company. According to Norwood/Allen, the ACF-400 is ideal for foods, pharmaceuticals, medical devices, cosmetics, chemicals and other products. Norwood/Allen says the ACF-400 can be changed over in only one minute with no tools and no change parts.



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## A-B-C introduces Model 136 sealer

A-B-C Packaging is now offering its Model 136 case taper, a sealer that includes safety guarding in the base price of the machine. According to the company, the full-enclosure guards enclose the machine, shielding employees from all dangerous operating mechanisms. When a guard is opened, the machine operation immediately stops, thus helping packagers reduce liability, meet safety standards and provide a safer plant environment. A-B-C also states the Model 136 is designed to minimize employee intervention, with all change-over adjustments completed by hand cranks on the outside of the machine frame. The tape system is positioned for quick and easy roll replenishment. The sealer has a heavy stainless steel box frame, welded and bolted for strength and durability.



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## Vortex Valves offers solution for cross contamination



The Quick Clean Orifice Gate Valves by Vortex Valves is designed to handle dry bulk solids in gravity-flow conveying applications. According to the company, it can be readily disassembled, cleaned and reassembled without tools for quick maintenance. Vortex Valves states that the blade and seal design of its Orifice Gate Valves vary from traditional equipment by having a self-clean feature, which allows the valve to maintain cleanliness and inhibit material leakage.

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## Ampac Flexibles provides solventless laminations



Ampac Flexibles, the flexible packaging division of Ampac Packaging LLC, has used its Comexi laminator, a unit that utilizes low viscosity adhesives to achieve strong interlayer lamination bonds, to provide solventless lamination for its customers. A recent internal study for Am-

pac showed an 86% improvement using solventless lamination over solvent-based lamination. According to Ampac, advantages include improved shelf-life, barrier and appearance as well as the elimination of concerns related to the removal of retained solvents and volatiles associated with solvent laminations.

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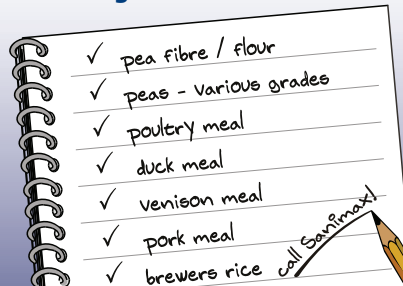
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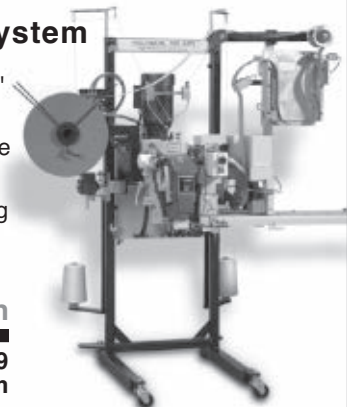
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## Petfood fights inflation

**I**nflation is becoming a fact of life in just about every region of the world. In the US, the consumer price index (CPI) increased 1% from May to June and 5% since June 2007. (As of press time for this issue, June data was the most recent available.)

The US Bureau of Labor Statistics, which tracks both consumer and producer prices, said the CPI increase was due mainly to sharp spikes in the energy and food indexes (no surprises there). Though the report did not separate out petfood, it specifically cited increases in the indexes for pets, pet products and services.

### Spanning the globe

This tale of inflation woe spans the globe. Consider these figures:

- ▶ In the 15-nation Euro zone, inflation jumped to another record high in July: a 4.1% increase over the same month last year and the highest inflation figure for the zone since tracking began in 1997 (*International Herald Tribune*, or *IHT*);
- ▶ Double-digit inflation is rampant in Eastern Europe, including 11.4% in Estonia, 17.5% in Latvia and 30.2% in Ukraine (April figures cited by [www.moneymorning.com](http://www.moneymorning.com));
- ▶ In Latin America, inflation forecasts for 2008 include 9.2% in Argentina, 13.8% in Nicaragua, 15.1% in Bo-

**There appears to be no end in sight to premiumization and humanization.**

— Debbie Phillips-Donaldson



livia and 25.7% in Venezuela (*Christian Science Monitor*); and

- ▶ Even the world's economic darling, China, experienced record inflation in March, with the 8.7% increase from March 2007 representing an 11-year high (*IHT*).

Again, the common culprits are energy and food costs; excepting those two sectors, inflation is low in many regions.

Of course, none of this is news to you; you've all been feeling the pain of rapidly increasing transportation and commodity prices for months now. The overall US producer price index for June jumped 1.8%—a 9.2% increase on a 12-month basis, the largest since 1981. The June petfood producer index rose 6% from May and 6% from June 2007. And the grain commodity index rose 8.7% from May to June 2008.

### No end in sight?

What may be a surprise is that, at least to date in developed regions, petfood consumers are not decreasing their spending. Euromonitor International reports that in the US, the only petfood categories showing a decrease in volume are mid-priced and economy dog foods and economy cat foods (p. 28). Euromonitor is projecting a 4.3% increase in US dog and cat food value sales for this year.

Despite the high inflation in China

and Eastern Europe, those economies are continuing to grow—the rate is not quite as healthy as in recent years but still respectable, especially when compared to growth rates for developed markets. For example, the US gross domestic product is expected to grow only 1% overall this year; Eastern Europe's is projected to grow 6%.

While Euromonitor acknowledges that rising commodity costs are cutting into petfood producers' profits, the report also points out that so far, pet owners seem to be accepting that you have to pass your increases on to them in the form of higher prices and/or smaller packages. Euromonitor attributes this acceptance and the continued market growth to premiumization and humanization. There appears to be no end in sight to these mitigating factors, at least not for higher-income pet owners in developed regions.

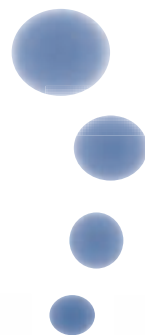
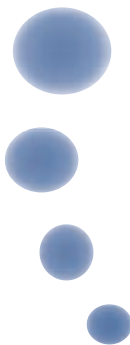
For pet owners suffering from the difficult economy, as well as those in developing markets, the picture may not be as positive. Only time will tell if petfood can continue to withstand the effects of inflation. ●

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

### Online resources

- [www.inflationdata.com](http://www.inflationdata.com)
- US Bureau of Labor Statistics, [www.bls.gov/CPI](http://www.bls.gov/CPI)
- [www.euromonitor.com/Pet\\_Food\\_And\\_Pet\\_Care\\_Products?DCMP=AFC-petfoodemail](http://www.euromonitor.com/Pet_Food_And_Pet_Care_Products?DCMP=AFC-petfoodemail)

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