

October 2008

Petfood Industry

WATT

Newest product trends for critters

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GLOBAL 

Vitakraft loves pets

And gives retailers merchandising support, p. 22

Product innovation explodes!

Antioxidant pros and cons





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On the cover: Vitakraft's Pet's Corner—a shop-in-shop system. *Photo courtesy of Vitakraft.*

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Petfood Industry online

The online community for petfood professionals

Departments on our Website

1. New Blog: *Petfood Pros* by Tim Phillips, DVM with opinions, networking, conversation and interesting Website suggestions. Please read it and make comments.



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2. Latest News: A look at what's happening in the petfood industry.

3. General Forum: Visit the general forum and post new topics or respond to previous topics. <http://www.petfoodindustry.com/discussions.aspx?g=topics&f=782>

4. Topics: List of topics pertaining to the articles presented by Petfood Industry, including: Nutrition/Ingredients, Company Profiles, Packaging, Market Data, Safety/Regulatory, Processing/Production. <http://www.petfoodindustry.com/topics.aspx>

Exclusive Web content

1. Best advice

Read the Fortune magazine article called "The best advice I ever got."

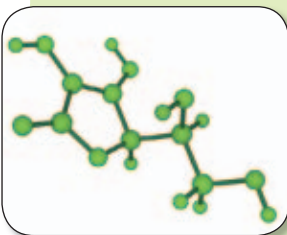
www.petfoodindustry.com/0810PETfortune.aspx



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2. A lot on antioxidants

Comprehensive information about antioxidants for petfood preservation from Kemin Nutrition, Lohmann Animal Health and Novus International. www.petfoodindustry.com/0810PETantiox.aspx.



3. New products roundtable

Listen to an audio recording of the new product development roundtable from Petfood Forum 2008. www.petfoodindustry.com/0810PETnprdroundtable.aspx.



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The best advice I ever got

I was a first-born overachiever and I grew up a devout Catholic—repressed and serious. Concerned about my solemnity, my Dad gave me this advice: “Lighten up and be yourself.” Back then it was easier said than done, but I eventually got the hang of it.

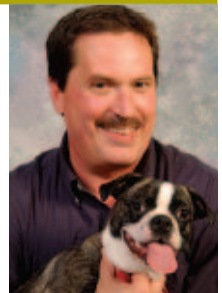
Fortune advice

Earlier this year, *Fortune* magazine published an article in which several accomplished people talked about the best advice they ever got (May 12, 2008). Here’s some of what they had to say.

- ▶ “First, always ask for the order; and second, when the customer says yes, stop talking.” *Michael Bloomberg, mayor of New York City.*
- ▶ “Look for an out-of-your-comfort-zone experience.” *David Petraeus, Former Commanding General, Multinational Force—Iraq.*
- ▶ “Focus on those things you do better than others.” *Peter G. Peterson, co-*

The best way to succeed in life is to act on the advice we give to others.

— Tim Phillips



founder, Blackstone Group.

- ▶ “Use your sense of humor to help diffuse anxiety. Humor takes away tension and helps you realize when you’re wrong.” *Craig Newmark, founder of Craig’s List.*
- ▶ “I’ve noticed that some of the most effective leaders don’t make themselves the center of attention. They are respectful. They listen. This is an appealing personal quality, but it’s also an effective leadership attribute.” *Sam Palmisano, CEO of IBM.*

- ▶ “Whatever anybody says or does, assume positive intent. You will be amazed at how your whole approach to a person or problem becomes very different.” *Indra Nooyi, chairman and CEO, PepsiCo.*

Complete article

To see the article from *Fortune* magazine, go to www.petfoodindustry.com/0810PETfortune.aspx.

- ▶ “Spend a ton of time with your customers. Ask them how you compare with competitors, how your service is and what they think of your products.” *Charlene Begley, president and CEO, GE Enterprise Solutions.*

Petfood industry advice

Gleaning through past issues of *Petfood Industry*, I found ideas and advice that I think hold up.

- ▶ “There are three primary trends driving growth in the global petfood market: humanization, convenience and health.” *David Lummis, market researcher with Packaged Facts.*
- ▶ “Whether or not we agree with any or all of the issues related to global warming, it can only do our companies good to adopt a culture of minimizing energy use and waste.” *Colin Mair, founder of Cormal Technology.*
- ▶ “The question is not whether you’ve had ISO training, but whether you know how to do your job effectively. Some people learn very little in training.” *Dr. David Rosenblatt, managing director of PDCA Training Solutions.*
- ▶ “Keep your eye on human food trends.” *Krista Faron, market researcher with Mintel.*
- ▶ Regarding the US Food and Drug Administration’s guidelines for improving petfood safety: “It is essential that the rules be science-based.” *American Feed Industry Association.*
- ▶ “Urbanization in developing markets has established the practical and emotional conditions for animals to go from working possessions to pets.” *Euromonitor International.*

Tricky business

Taking advice is tricky business, because sometimes it’s just plain manipulation. Besides, the best advice often lies within. It’s been said the best way to succeed in life is to act on the advice we give to others (vs. take my advice, I don’t use it anyway!). In any case, I believe that if you do give advice, it’s best if it’s brief. ●

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



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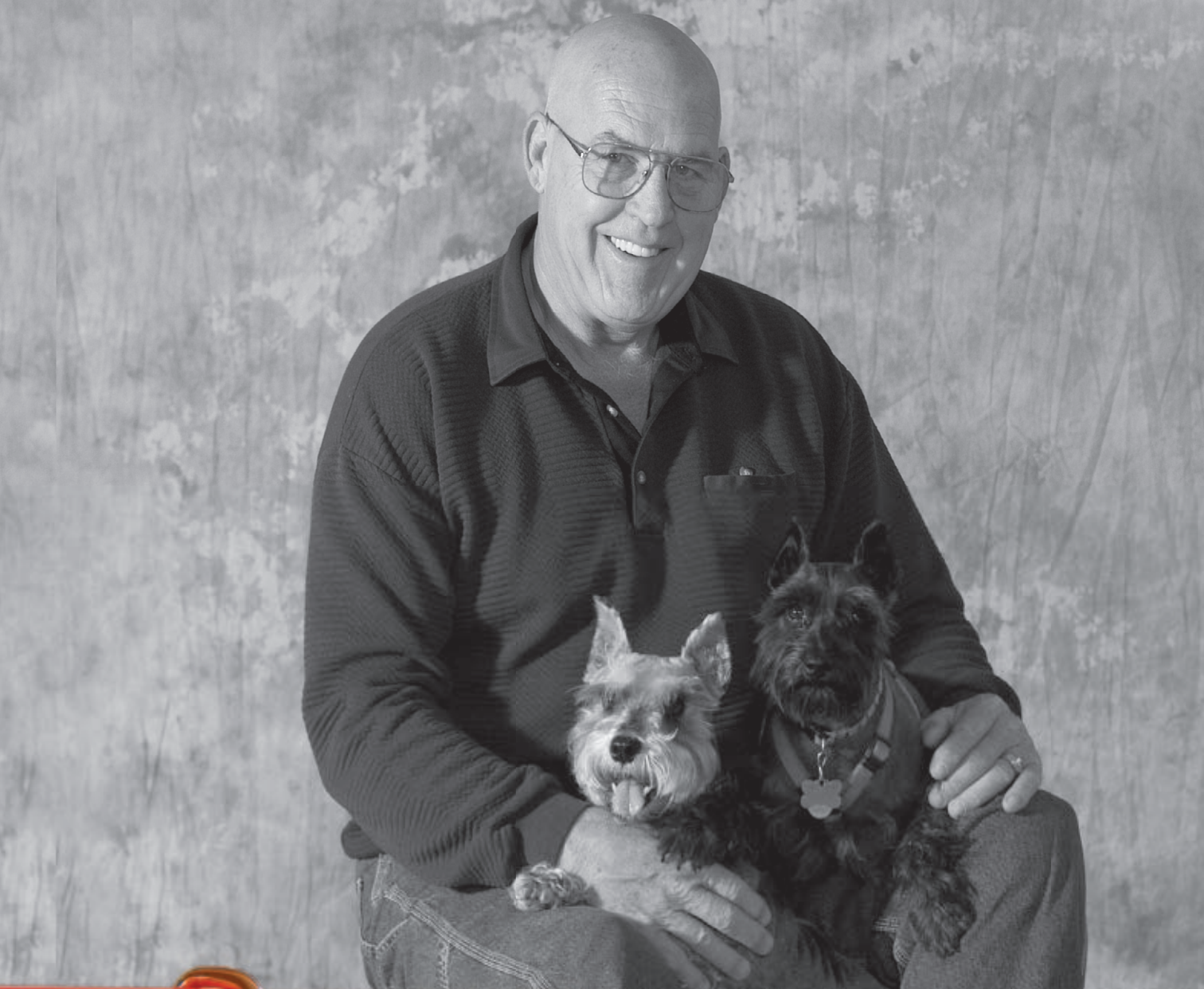
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Industry News

Quick hits

- ▶ Planet Dog Foundation has awarded a grant to the Christopher and Dana Reeve Foundation.
- ▶ Kane Biotech Inc. has entered into a material transfer and evaluation agreement with Ward Industries Group.
- ▶ Zeus & Co. has expanded distribution to the west coast of the US.
- ▶ WeighPack Systems Inc. has recruited Mario Medina and Stephen Farruggio to their sales team.
- ▶ Nestlé S.A. has appointed Luis Cantarell, executive vice president and head of zone Americas.
- ▶ PetValu has completed its acquisition of 15 Berrys, Your PetsChoice stores.
- ▶ Four petfood industry brands made it into the UK's Top 500 Brand Names list this year, including Whiskas and Pedigree, by Mars Inc.

PetfoodForum



Exciting changes to Petfood Forum 2009; brand new Petfood Workshop

Petfood Forum 2009 will take place April 20-22, 2009 at the Hyatt Regency O'Hare Hotel near Chicago, Illinois, USA. The premiere event for the petfood industry offers even more learning and networking opportunities than years prior. Registration for this exciting event is available at www.petfoodindustry.com/petfoodforum.aspx now!

Keynote speaker Marty Becker, DVM, popular veterinary author and regular contributor to *Good Morning America*, will be sure to draw a big audience. His specialty is the power of the bond between pets and their people, and he applies the insights he's cultivated—from a career of writing on, speaking about and treating animals—to the unique opportunities facing our industry. This year's line-up also will include:

- ▶ Informative sessions on market trends, functional ingredients, feeding trials and other key topics—presented by speakers specially selected through a rigorous call for papers program;
- ▶ Roundtable discussions featuring panels of experts on provocative subjects like petfood politics, guerrilla marketing and more;
- ▶ All-new poster presentations on the most important topics for the industry; and
- ▶ All-new networking event exclusive to Petfood Forum guests.

PetfoodWorkshop



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The Petfood Workshop: Essential Training will take place April 22-23, 2009. This seminar will provide a thorough overview of the petfood market, its structure and key players, plus the important growth driver of new products and how they impact the industry. Plus, can't miss break-out sessions delve into four fundamental areas of petfood:

- ▶ Nutrition and ingredients;
- ▶ Processing;
- ▶ Safety and regulatory; and
- ▶ Packaging.

This essential workshop also will offer plenty of opportunities for you to network with other industry professionals, along with veterinarians and pet retailers who can benefit from learning all about the dynamic petfood industry. Seating for this workshop is limited—sign up now at www.petfoodindustry.com/petfoodworkshop.aspx!

For more information, contact Nancy Grossnickle at ngrossnickle@wattnet.net or call +1.815.966.5574.

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PETFOOD INDUSTRY

G L O B A L



Cats taking a bite out of world fish supply. Gourmet meals dished up to pampered felines could be threatening world fish supplies, Australian scientists have warned. Calculations by Deakin University researchers show an estimated 2.48 million tons of forage fish are used each year by the global cat food industry.

Leading this business is the US, where more than 1.1 million tons of small forage fish, including sardines, herrings and anchovies, go into cat food. Across Europe the figure is close to 870,000 tons, while almost 34,000 tons of the increasingly limited biological resource was imported into Australia each year to satisfy feline appetites.

Fish nutrition researcher Giovanni Turchini described the findings as “a real eye-opener.” They reveal the extent to which fish suitable for human consumption goes into cat food. Each cat in Australia eats 13.7 kilograms of fish a year, while humans on average consume about 11 kilograms of fish and seafood each. “Australian pet cats are eating better than their owners,” Dr. Turchini said.

With ongoing debate about how to manage marine resources, the Deakin scientist said more research was needed to determine how much of the fish in cat food could be replaced by fish offal and other meat by-products. “I think giving a nice chunk of fish to a pet is important to satisfy the personal hedonistic needs of the owner, not the nutritional need of the cat,” he said. “Cats will be very happy to eat the offal from a trout.”

Dr. Turchini’s paper, co-written with colleague Professor Sena De Silva, is published online by the *Journal of Agricultural and Environmental Ethics*.

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October

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5	6	7	8	9	10	11
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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 Ballpark Hotel, St. Louis, Missouri, USA. Contact: Dorothy LaFlamme, Tel: +1.540.745.2841, dorothy.laflamme@rdmo.nestle.com, www.purinavets.com.

H.H. Backer Christmas Trade Show, October 3-5, 2008, Donald E. Stephens Convention Center, Rosemont, Illinois, USA.

Contact: H.H. Backer Associates, Tel: +1.312.663.4040, hhbacker@hhbacker.com, www.hhbacker.com.

AHVMA Annual Conference, October 11-14, 2008, John Ascuaga's Nugget Casino Resort, Reno, Nevada, USA. Contact: AHVMA Offices, Tel: +1.410.569.0795, Fax: +1.410.569.2346, office@ahvma.org, www.ahvma.org.

Wild West Veterinary Conference, October 15-19,

2008, Grand Sierra Resort, Reno, Nevada, USA. Contact: Wild West Veterinary Conference Registration Center, Tel: +1.703.449.6418, Fax: +1.703.631.1167, wildwestveterinaryconference@jpsargo.com, www.wildwestvc.com.

4th Annual Kemin Science of Petfood Symposium, October 21-22, 2008, Jalta Hotel, Prague, Czech Republic. Contact: Silke Taris, Tel: +1.32.14.25.9797, silke.taris@kemin.com, www.kemin.com.

November

S	M	T	W	T	F	S
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2	3	4	5	6	7	8
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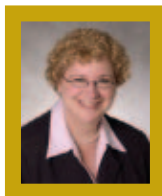
AFIA Equipment Manufacturers Conference, November 6-8, 2008, Hyatt Regency Hotel, Savannah, Georgia, USA. Contact: Judy Pilgrim, Tel: +1.703.524.0810, afia@afia.org, www.afia.org.

12th Annual China International Pet Show (CIPS), November 6-9, 2008, Beijing Exhibition Center, Beijing, China. Contact: Mr. Harry Hao, China Great Wall International Exhibition Co. Ltd., Tel: +86.10.68748649, Fax: +86.10.68748993, junxue@chgic.com, www.cipscom.com.

Pack Expo International, November 9-13, 2008, McCormick Place, Chicago, Illinois, USA. Contact: PMMI, Tel: +1.703.243.8555, Fax: +1.703.243.8556, expo@pmmi.org, http://pei2008.packexpo.com.

A complete listing of 2008 events is available at www.PetfoodIndustry.com

Trends in petfood: humanization and beyond



The word on everyone's mind when talking about petfood is "humanization." More and more, trends in petfood can be tied to trends in food for humans, although pet needs are distinct and often different. Join Lynn Dornblaser, director of consulting from Mintel International, for a discussion on key trends in petfood humanization and other developments in petfood products and nutrition.

This **FREE online seminar** will be presented by *Petfood Industry* magazine on **November 18, 2008 at 2 p.m. Eastern.**



To register for this webinar please visit www.petfoodindustry.com/webinars.aspx

Mars recalls some dry petfoods

In September 2008, Mars Petcare US announced a voluntary recall of all products produced at its Everson, Pennsylvania, USA facility beginning February 18, 2008 until July 29, 2008. The petfood is being recalled because of potential contamination with *Salmonella Schwarzengrund*. This voluntary recall affects 31 states in the US.

“Even though no direct link between products produced at the Everson manufacturing plant and human or pet illness has been made, we are taking this precautionary action to protect pets and their owners. We are continuing to work collaboratively with the FDA to determine the nature and source of *Salmonella Schwarzengrund* at the facility, and are committed to making sure our consumers and customers have the information they need regarding our voluntary recall,” said Catherine Woteki, global director of scientific affairs, Mars Inc.

Mars Petcare US stopped production at the Everson facility on July 29, 2008 when the company was alerted of a possible

link between dry petfood produced at the plant and two isolated cases of people infected with *Salmonella Schwarzengrund*.

To avoid any potential risk to pets and their owners, the company initiated an extensive internal investigation in cooperation with the FDA. Ultimately, none of the petfoods found in consumer homes have been determined to contain *Salmonella*, and there have been no reports of pet illnesses in those households as of press time. However, the strain of *Salmonella Schwarzengrund* involved in the illnesses has been detected in the company’s Everson facility.

Many of the brands involved in the recall are national brands produced at multiple facilities. For example, the company manufactures Pedigree in numerous facilities throughout the country, and the Everson facility represents a very small portion of the manufacturing base—2.7% of total Pedigree production.



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Petfood recall leads to 6,000 claims and counting

Almost 6,000 claims have been filed in a class-action settlement stemming from last year's massive petfood recall. Menu Foods, other petfood makers and retailers in May agreed to set up a US\$24 million cash fund to compensate pet owners whose cats and dogs became sick or died after eating food that had a contaminated ingredient from China. The filing period for claims began May 30, 2008 and will run until November 24, 2008.

"I expect that number (of claims) will go up a lot. There's quite a bit of time to go," says attorney Sherrie Savett of plaintiffs' law firm Berger & Montague. The Food and Drug Administration (FDA) never identified how many pets were affected, but it received more than 17,000 complaints.

Once a claim is filed, it will be reviewed by an independent claims administrator. Claimants may receive a 100% cash payment for all documented expenses deemed reasonable, including veterinary bills and burial costs. They may receive up to US\$900 for undocumented expenses. Under the terms of the settlement, most claims are likely to be paid next year. To be eligible, claimants must have bought or fed their pets one of the recalled petfoods.

A federal judge in New Jersey, USA gave the settlement preliminary approval in May. A hearing for final approval is scheduled for October. If the court approves the settlement as expected, it would resolve more than 100 lawsuits brought in the US and a dozen in Canada. The US\$24 million is in addition to US\$8 million that petfood makers have already paid to pet owners. Legal fees and attorneys' expenses, which haven't been determined, will come out of the fund. The vast majority of the fund will go to pet owners whose pets were injured or died as a result of kidney failure, which was linked to the contaminant.

Alternative petfood sales booming in the US and Canada

Retail sales of alternative petfoods—including raw, frozen, organic, holistic and natural—are growing at a significantly faster rate than the market as a whole in the US and Canada, according to Packaged Facts. The research firm said the key driver of growth between 2003 and 2007 was the increasing belief among consumers that better quality foods offer health benefits for their pets. Packaged Facts estimates that the fresh food market, which was worth US\$169 million in retail sales last year, will continue to grow. The analyst forecasted that the market would increase by 23% by 2012.

According to the report, *Fresh Pet Food in North America: The Raw/Frozen, Refrigerated and Homemade Wave*, the fastest growing sector of the alternative petfood market is organic food. Last year the sector recorded a 48% jump in retail sales compared with 2003. Last year, organic food sales accounted for just 6% of total petfood sales, but its growth rate was far greater than the market as a whole which is steadily increasing at 5% or 6%.

Retail sales of fresh petfood rocketed 38% between 2003 and 2007. According to Packaged Facts, the refrigerated market, which was dominated by Bil-Jac and had remained stagnant with a market share value of US\$3 million since 2003, more than doubled last year when Fresh Pet entered the market, driving category growth.

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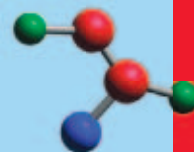
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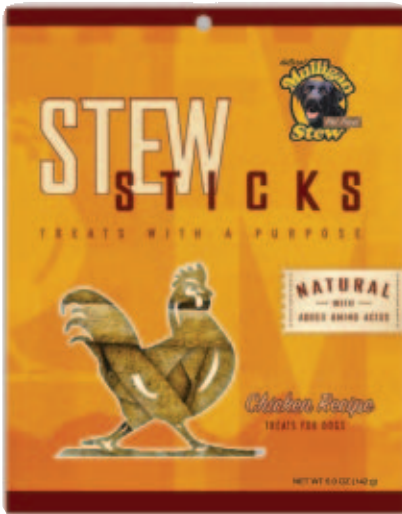
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www.mulliganstewpetfood.com/index.php

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Kali Wags dog snacks are made in Squamish, British Columbia, from restaurant-quality whole foods. The trial-size pack comes in a stick or bits version. Kali Wags are available in some hotels, boutiques, gift stores and natural/organic groceries. The snacks are made with certified organic beef, according to the company. www.kaliwags.com



« Bright Bites dental treats

Bright Bites daily dental treats for dogs freshen breath, clean teeth and help reduce plaque build-up that can lead to future health problems, according to the company. The treats are soluble and come in three sizes for small, medium and large breeds. Cinnamon, peppermint and spearmint flavors are available.
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Vitakraft loves pets

And gives retailers a lot of merchandising support

BY TIM PHILLIPS, DVM

“Feed with love” is Vitakraft’s motto. “This motto is the core idea behind our company philosophy,” asserts Dieter Meyer, the company’s head of communication. Vitakraft began in 1837 as a small petfood business near the city of Bremen, Germany. Since then it has developed into one of the most successful companies in the pet-food industry.

R&D goals

“Vitakraft is proud to be a family-owned, independent and innovative company,” says Meyer. The two primary goals of its research and development are:

1. A long, happy and healthy life for our pets and
2. The satisfaction of the owner.

Meyer notes that Vitakraft offers feeding concepts developed by scientific research

about how pets eat in nature. “Mother Nature decides what is best for them,” says Meyer.

He says the company has highly motivated experts in its R&D department creating new and innovative product-concepts. This, along with geographic expansion, are its keys to future growth.

Over 3,000 items

With over 2,100 employees worldwide, Vitakraft offers over 3,000 items, including daily foods, healthy treats and diverse



Vitakraft supplies a deep and complete assortment of appropriate products for many species.

Business basics

Headquarters: Bremen, Germany

Officers: Heiko Wuhmann, president and CEO; U. Schmidt, executive officer controlling; Rainer Kreie, CEO production and technology

Annual sales: Euromonitor estimates Vitakraft’s 2007 sales at US\$300 million, with US\$121 million coming from dog and cat foods

Brands: Vitakraft, Sun Seed, Vitobel and Aqua Food

Distribution: The Vitakraft Group now includes 20 companies in 19 countries and over 5,000 business partners in over 50,000 shops worldwide

Employees: Over 2,100

Website: www.vitakraft.de



“The company is growing by extending its global market presence.”

pet care and hygiene products. The company generally supplies all existing sales channels in a market: mass markets, specialty pet shops and do it yourself (DIY) stores.

In addition to innovative products, the company is growing by extending its global market presence. Since 2000, it has established eight new Vitakraft sales companies in eight countries, both start-ups and acquisitions. With this international expansion, the Vitakraft Group now includes 20 companies in 19 countries.

“More than 5,000 business partners in over 50,000 shops worldwide stock Vitakraft products,” Meyer declares. He notes that in the last year, the company expanded into new markets in Europe—Hungary, Poland, Czech Republic and Slovakia. It has also demonstrated its strong commitment to the US market via the Sun Seed acquisition.

Growth drivers

Meyer believes the global market drivers for the petfood industry will be:

- ▶ Premiumization;
- ▶ Humanization;
- ▶ Adaptation to modern, urban lifestyles;
- ▶ The increasing popularity of dry food; and
- ▶ The growing demand for small animals.

“The high degree of emotional connection between people and their pets bodes well for international pet markets,” he says.

Challenges

“We are not afraid of the customary market challenges, competition,

consumer behavior, etc.,” maintains Meyer. “However, as an international enterprise we are highly concerned about the increasing competitive distortions due to massive restrictions on free trade.” He says import restrictions in the form of hidden duties, rules and certifications cause huge expenditures that are often difficult to overcome.

Full-concept supplier

Meyer says over the last 10 years, Vitakraft has become “a full-concept

supplier”. First, it supplies a deep and complete assortment of appropriate products for many species. Second, the company has developed its competence in category management. “Today,” he says, “Vitakraft stands out to our customers as a dependable partner offering the proper product mix for differing retail environments and top-notch merchandising advice at multiple price levels. Our company wants to ensure the correct feeding and care of all pets.” ●



Customizing with Mix-It

At the this year's Interzoo, the world's largest trade show for the pet business, Vitakraft launched the “Mix It” principle for dogs and cats. The principle is to provide variety in the feeding bowl without having to change the main food. For both animal species, there are two main food assortments (VitaLife and VitaBasic), which can be combined with up to 50% of a food mixer (VitaVario and VitaControl options).

Following are the steps in the Mix-It principle for dogs.

Step 1. Choose the main supply for your dog according to its nature and age:

- ▶ VitaLife Fitness for dogs full of vitality.
- ▶ Sensitive VitaLife for dogs with sensitive skin and digestive organs.
- ▶ Vitabasic Weight Control for dogs over a year tending to be overweight.

Step 2. Choose a complementary feeding program:

- ▶ VitaVario Lamb for food allergies.
- ▶ VitaVario Canard (duck) if your dog is gourmet.
- ▶ VitaControl Immun Activ for boosting immunity.
- ▶ VitaControl Arthro Fit to improve its mobility.
- ▶ VitaControl Anti Odor to decrease odors from feces, urine and flatulence.
- ▶ VitaControl Long Hair when brushing is difficult.
- ▶ VitaControl Short Hair if hair is short and dull.

Step 3. You mix the main and complementary products in 50-50 proportion. It's ready!



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Innovation explodes!

Driven by functional claims, taste and convenience, global new product development is booming

BY KRISTA FARON

Today's global economy doesn't just affect commodity agriculture, 24/7 IT support and multi-national business leaders. It also has a profound effect on the world's smallest consumers—our pets. Although North America is still the nucleus of the global petfood industry, innovation in other markets is shaping new product development around the world, including in the US. Increasingly, inspiration for petfood formulations, claims and packaging is coming from places as diverse as Brazil, Russia and South Africa.

Exploding around the globe

The explosion in product launch activity outside the US underscores how active the global petfood market truly is. Consider that in 2005, North America was the leading petfood market in terms of new product introductions. By 2007 it had been eclipsed by Europe, whose introductions grew 44% from

2005 to 2007, according to Mintel's Global New Product Database (GNPD). Asia Pacific and Latin America saw even more aggressive new product growth during that period at 122% and 95%, respectively (Figure 1).

By contrast, North America saw petfood introductions decrease 5% — the only region to experience a decline from 2005 to 2007. As pet owners around the world begin to adopt more of the habits of North American consumers, the global petfood market is becoming more progressive and sophisticated.

Find more online

Access Mintel's Global New Products Database at www.gnpd.com. Mintel's latest report on the US market, *Pet Food and Supplies-US* (August 2008), is available at <http://oxygen.mintel.com>.

It's all about function

Much of today's global innovation is rooted in functional ingredients and foods. From 2005 to 2007, functional claims grew exponentially and appeared among the top 10 petfood claims overall. To date in 2008, the Mintel GNPD shows functional claims outside North America related to digestive health, immunity, bone health, beauty benefits and cardiovascular health have all appeared among the top 10 overall petfood claims—outranking and outnumbering those same claims in North America.

An emerging area of global functional innovation is brain health. Just as human consumers are turning to omega-3 fatty acids to boost their cognitive performance, pet owners are looking for the same for their cats and dogs. Specifically, petfood companies are calling out the inclusion of a particular omega-3, DHA, for its mental function benefits.

Since DHA is especially important to early brain development, it is often added to foods for puppies and kittens. In Portugal, DHA is used in Iams' Eukanuba Puppy & Junior Dry Dog Food to support hearing and vision as well as brain health. This fatty acid plays a similar role in Whiskas' Chicken & Milky Plus Nuggets sold in India. But DHA can also bolster cardiovascular health, and in Thailand, CP Smart Heart Toy & Small Breeds Dog Food includes it to reduce pets' cholesterol.

Keeping a healthy gut

Best known for their digestive health and immunity benefits, probiotics have become a mainstream health ingredient for consumers around the world. Growing education about these friendly bacteria has prompted pet owners to seek out probiotics as functional ingredients in their pets' food.

Brazilian petfood company BanPet adds probiotics to its BanCook Nino Mini Biscuits to aid dogs' digestion. And in Russia, Mars has introduced probiotic-rich Immuno Cat Food with *Lactobacillus*, part of its Whiskas line, to improve immunity among cats.

Probiotics' popularity has paved the way for two related trends—prebiotics and yogurt. Prebiotics are essentially the food that probiotics need to stay alive. Prebiotics are most often associated with digestive health, as is the case in Finland, with ProFormance's Freshway Garden Chicken Cat Food, which uses probiotics to promote good intestinal function.

Yogurt has also gained a "healthy halo" because of its alignment with probiotics in human foods and beverages. Nestlé features yogurt in Austria's Purina One Natural Balance Adult Cat Food, although here its calcium content is highlighted for its bone- and teeth-building properties. In Spain, dog owners can find Biazoo's Yogurt Drops dog treats. Yogurt even exists in standalone form in Germany's Yo Cat, which is sold in four 62.5 g pots that bear a striking resemblance to yogurt made for human consumption.

Don't forget taste

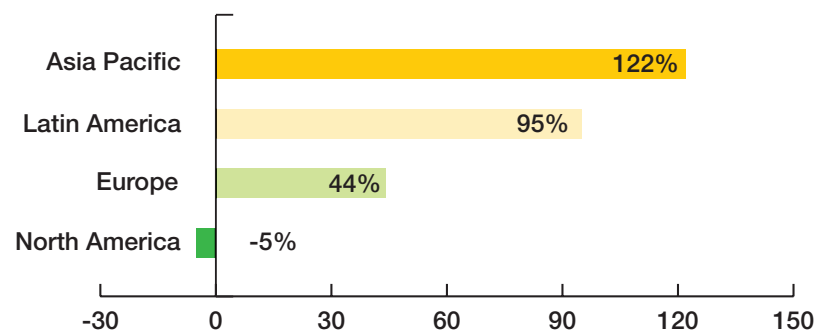
But global petfoods aren't just about functional benefits; they are also devoted to good taste. Especially in Europe, steam cooking has emerged as one of the best ways to retain petfood's flavor and freshness. It also has an inherent association with gourmet foods, allowing manufacturers to charge a premium for their steamed offerings.

have taken a completely different approach to convenient petfood packaging with stick packs. Similar to single-serve beverage sachets for humans, these individually wrapped portions contain dry cat food for convenient dispensing with no waste or clean-up.

Packaging innovation isn't confined to single-serves; it extends to multi-pack petfood, too. French retailer Car-

Figure 1: Change in petfood product launches 2005-2007

Between 2005 and 2007, North America was the only region to show a decline in new petfood products; all other areas grew dramatically.



Mars' Cesar brand offers steamed dog food in Europe and features such varieties as Mediterranean-Style Chicken and Italian-Style Beef and Pasta. Whiskas has been a leader in this trend by selling steamed cat foods throughout Europe and recently reformulating its French wet cat food to be steam cooked.

Mess-free eating

Convenience is another significant driver in the development of global petfoods. International petfood manufacturers have been savvy about adapting packaging to on-the-go lifestyles and changing consumer tastes. Companies are also now developing human-inspired packaging for mess-free eating.

Butcher's Pet Care in the UK introduced its Olli Cat Food Assortment in disposable plastic bowls with peel-back lids. The package features anti-slip technology, ideal for mats or hardwood floors, to prevent slipping and spilling.

In Japan, Mars and its Sheba brand

refour introduced its mousse-style cat food in a vertical, octagonal eight-portion carton that stands out on the shelf and saves space.

With international players continuing to develop petfoods in record numbers, this kind of innovation will inevitably affect the marketplace in significant ways. ●

Krista Faron is a senior analyst with Mintel Research Consultancy, www.mintel.com.

Facing page, left to right: Olli Cat Food (UK), Immuno Cat Food (Mars Russia), Sheba dry cat food in single-serve stick packs (Mars Japan), CP Smart Heart Toy & Small Breeds Dog Food (Thailand), Carrefours multi-pack wet cat food (France), BioZoo's yogurt drop dog treats (Spain) and Mars' Cesar steamed dog food (Europe).

Newest product trends for critters



Five emerging petfood and treat fads for companion animals other than dogs and cats

BY JESSICA TAYLOR BOND

According to Euromonitor International, rabbits, guinea pigs, chinchillas and other small herbivores are growing in popularity, particularly in urban areas. Their small size, life span and the fact that they do not need as much attention and exercise as a larger pet has made them popular with busy professionals and those living in apartments.

According to a Mintel report on petfood trends in the US, the petfood market (non-dog/cat) has experienced a 15.7% growth rate from 2006-2008. The small animal segment made an estimated US\$681.8 million in 2006 and rose to US\$788.9 million this

year. An annual report by the Pet Food Manufacturers' Association (PFMA) in the UK said the national small animal market was up 2% on volume and 6% on value to £56 million (US\$109 million). PFMA now collects population data on a whole range of pet species beyond dogs and

cats. This is highlighting the growing popularity of smaller pets such as rabbits, which now number more than a million out of a small animal total of 2 million.

Small animals, big mouths

There are many food and treat options available for these small mammals, according to Laura Duclos, PhD, but not all veterinarians are as knowledgeable about the nutritional needs of rabbits and guinea pigs as they are about cats and dogs. According to Dr. Duclos, the bulk of small animals' diets should be:

- **Continual access (free feeding) to grass hay such as timothy, oat or brome.** These options are high in fiber, help maintain proper weight and help prevent dental disease and malocclusion.
- **Low-fat pellets, fortified with vitamins and minerals.** This food option is needed to supply the daily nutrient requirements of the animals. The pellets should consist mainly of hay, not alfalfa, and beet pulp should be avoided as an ingredient as it may lead to intestinal blockage and is low in non-fermentable fiber. Pellets with corn should also be avoided, according to Dr. Duclos, because the simple carbohydrates promote obesity and intestinal dysbiosis.
- **Clean, vitamin-fortified water.** Essential for all living things, good ol' H₂O is especially important for smaller animals—like ferrets and chinchillas—to maintain overall health, teeth growth and a shiny, thick coat.

Consumers who own small ani-

In a natural setting, small herbivores have opportunity to seek a wide variety of plants and grasses for their high fiber, forage-based diets.

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mals, just like their dog- and cat-owning counterparts, want more than just the average fare for their little, furry friends. The small animal petfood and treat market, therefore, follows many of the trends the dog and cat market track, but in its own unique way.

1. Humanization



Primetime television is fixated on pets with shows like *Pet Star* and *America's Greatest Dog*, so it's no surprise smaller animals are starting to share the spotlight. With the release of the animated film *Ratatouille*, Disney/Pixar also let loose two treats for the creatures the movie features. Le Bon Croissant, a nutritious treat shaped just like a

croissant for all small animals, according to the company, has an easy to grab shape and crunchy texture that promotes small animals' natural chewing instinct. Le Quiche Lorraine—also for a variety of small pets and looking far too convincingly like the human dish of the same name—is made with a secret French recipe, according to the treat maker. The treat combines a crunchy crust outside with a fresh carrot center, inviting critters to start munching.

2. Probiotics

Food supplements that boost immune function and overall health in pets are a hot topic in the dog and cat food market, and the small animal food market has taken notice. Through their research, Zeigler Bros. has developed Vitality Pak, branded as Vpak, an all-natural, nutritional feed additive that contains no antibiotics and is designed to improve overall health

and resistance to disease.

"Vpak works to boost an animal's defense system by using bio-active compounds that stimulate their immune systems while supplementing essential nutrients," said Tom Zeigler, PhD, chairman of Zeigler Bros. and an expert in nutritional immunology. The best results from Vpak have been demonstrated when offered throughout an animal's complete lifecycle. Zeigler Bros. can offer Vpak by request in any of the diets they currently formulate.

G-Whiz for Small Animals is a dietary supplement developed by Earth's Balance that provides essential amino acids that help digest the undermetabolized proteins that produce nitrogen waste (urine ammonia), the cause of cage odors. When added to a small animal's regular diet, according to the company, it helps



Lee Linthicum



Emily Woon

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3. Organic

USDA-certified organic may be a hard seal to come by, but small animal petfood companies are often beating their larger animal equivalents to that punch. Take for instance, Oxbow Enterprises Inc. and its recent release of Organic Rabbit and Organic Guinea Pig. The diets, according to the company, have been specially formulated to mirror the nutrition, rabbits and guinea pigs would find in their natural environments. The food also features balanced omega 3 and 6 to improve skin and coat, high-fiber



hay to support digestion and anti-oxidants to build immunity, according to Oxbow.

4. Natural

In a natural setting, small herbivores have opportunity to seek a wide variety of plants and grasses for their high fiber, forage based diets. Sunaturals Food & Treats offers a plethora of all-natural food blends, mixes and treats for almost every small animal imaginable. Natural herbs, flowers and greens are blended with berries, vegetables and grains to yield holistic formulas rich in phytonutrients and natural antioxidants, according to the company. Sunaturals







also attests that their products are free of artificial colors, flavors and preservatives.

5. Bottled water

While formulated daily drinks for dogs and cats seem to be flooding the market, bottled water for small companion animals may be a little bit harder to come by. That is, until Special Waters SAS launched Water Little. The company is the leading manufacturer in Europe of enriched drinks for domestic animals and recently released its innovative products in the US. The bottled water contains only natural spring water, organic/natural active ingredients and no added sugar, salt or flavoring, according to Special Waters. Water Little has three specific formulas available for hamsters, guinea pigs, rabbits and ferrets.



4 Pillars to build on

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Antioxidant options

BY TIM PHILLIPS, DVM

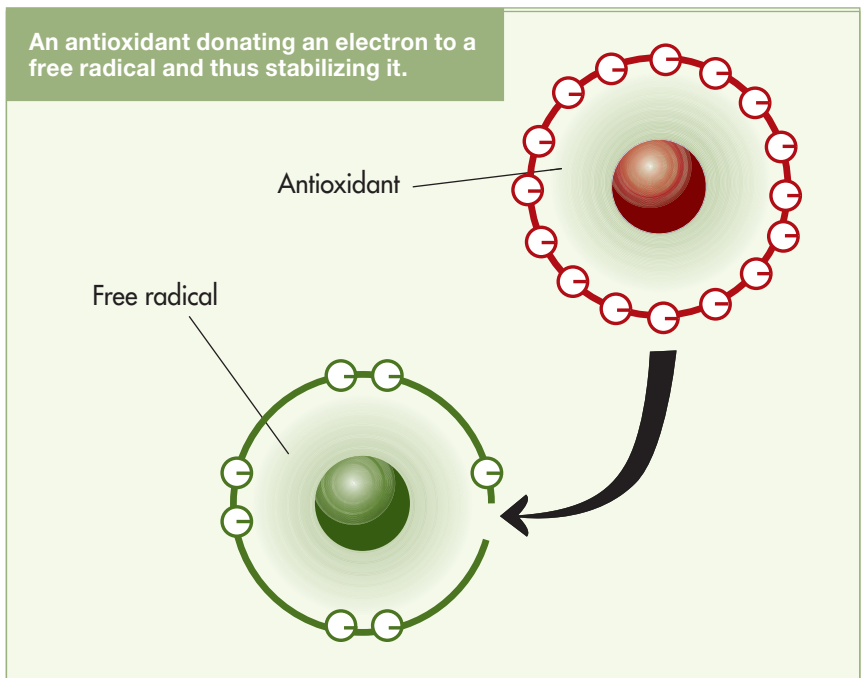
Fat oxidation can lead to petfoods with objectionable odors and flavors. That is, it leads to rancidity—production of compounds such as hydrocarbons, aldehydes, ketones, alcohols and organic acids. Antioxidants prevent fat oxidation and so help avoid petfood rancidity.

A free radical is a molecule with a missing electron. When a fat molecule loses an electron, it becomes a fat free radical. An antioxidant donates one of its electrons to such a free radical. This stops a free-radical chain reaction that can lead to objectionable odors and flavors.

Key questions

Selecting the appropriate antioxidant and dosage level can be a complex decision that involves evaluating several parameters, such as:

1. What is the regulatory status of the antioxidant (type of antioxidant and concentration) in the country where the product will be sold?
2. Marketing and consumer desires—is it required that the product be natural? Non-GMO? Organic?
3. What type of processing conditions will the antioxidant be subjected to—baking, extrusion, drying, agitation, etc?
4. What type of product is being stabilized—bulk oils, emulsions or products that are baked, extruded or soft moist?
5. What is the desired shelf life?
6. At required dosage rates, is the cost acceptable?
7. What is the composition of the product being stabilized? Are mineral catalysts present?
8. How and where will the antioxidant be applied?
9. What form—liquid or powder?



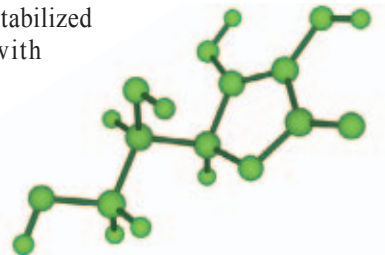
Natural vs. synthetic

Antioxidants are generally categorized into two classes: primary and secondary. Primary antioxidants are capable of interrupting and terminating the free radical propagation step. The most common *synthetic* primary antioxidants are butylated hydroxyanisole (BHA), butylated hydroxytoluene (BHT), tert-butyl hydroquinone (TBHQ), propyl gallate and ethoxyquin.

The most common *natural* primary antioxidants are mixed-tocopherols and rosemary extract. Mixed-tocopherols are composed of four homologs: alpha-tocopherol (vitamin E), beta-tocopherol, gamma-tocopherol and delta-tocopherol. It is well recognized that the order of *in vitro* antioxidant activity is delta > gamma > beta > alpha. In addition, delta-tocopherol also has superior process stability and carry-through to gamma-tocopherol. In bio-

logical systems (*in vivo*), the alpha-tocopherol is most active.

Tocopherols have no legal limit, but can act as pro-oxidants if added at excessive levels. Tocopherols are expensive compared to synthetic antioxidants, and more importantly, they have less antioxidant activity compared to synthetics. Petfoods stabilized with tocopherols, as with all natural antioxidants, have a reduced shelf life compared to those stabilized with



Vitamin C is one of several natural antioxidants available.

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Pros and cons: Which ones are right for your products?

synthetic antioxidants. Other natural antioxidants are vitamin C, carotenoids, flavenoids, sulfides and thiocyanates.

Secondary antioxidants are chemicals that can prevent free radical formation. The main secondary antioxidants are metal chelators (citrates and phosphates) and reducing agents (ascorbates and sulfites).

Pros and cons

Following are commonly used antioxidants, along with some of their pros and cons.

BHA. *Pros:* More effective than BHT, more heat stable than BHT and good oil solubility. Solubility in propylene glycol allows it to be mixed with high levels of propyl gallate and citric acid for oils that are more unsaturated. *Cons:* It is synthetic and it's susceptible to losses due to steam distillation.

BHT. *Pros:* Economical, good synergy with BHA and good oil solubility. *Cons:* It is synthetic and less effective than BHA. It's susceptible to losses due to steam distillation.

TBHQ. *Pros:* It is very effective in highly unsaturated fats such as fish and vegetable oils and it has excellent process carry-through. *Cons:* It is synthetic and lacks broad global regulatory approval. Can't be used in combination with propyl gallate.

Propyl gallate. *Pros:* Good alternative in highly unsaturated fats where TBHQ is not a desired or legal option. Good synergy with BHA and citric acid. *Cons:* It is synthetic and can form colored complexes with copper and iron ions. Poor process carry-through and poor oil solubility.

Ethoxyquin. *Pros:* Very effective antioxidant. Regulations allow higher dosage rates than other synthetics. *Cons:* It is synthetic and has a negative



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consumer perception. In 1997, the FDA requested a voluntary reduction of ethoxyquin in dog food from 150 ppm to 75 ppm. Usage has steadily decreased since the mid-1990s, to the point it's scarcely used.

Mixed-tocopherols. *Pros:* It is natural with good consumer acceptance.

High heat stability, good process carry-through, low volatility and excellent solubility in fats. *Cons:* Increased diet formulation costs and increased application rate necessary. May require increased time to develop and maintain a unique supply chain.

Rosemary extract. *Pros:* It is natu-

ral with good consumer appeal. Effective in stabilizing unsaturated oils, such as fish and vegetable oils. *Cons:* Poor carry-through in extrusion processing, only regulatory approval is as a flavor or spice and there is a high level of variability amongst suppliers. Increased diet formulation costs and increased application rate necessary. May require increased time to develop and maintain a unique supply chain.

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Rosemary extract is natural with good consumer appeal.

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Oxidation is irreversible

Increased usage of omega fatty acids has resulted in products more difficult to stabilize. Another challenge is a growing demand for natural products.

Oxidation is an irreversible process, so antioxidants should be added as early in the process as possible. Development of a quality supply chain and proper analytical testing procedures can assist in ensuring that oxidation does not impact product quality or performance. ●

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AAFCO holds petfood workshop

After a couple of years of discussion and planning, the Association of American Feed Control Officials (AAFCO), along with the Pet Food Institute (PFI), held a petfood regulatory workshop in early August, the day before AAFCO's Annual Meeting in Nashville, Tennessee, USA. The intent was to educate both regulators and industry professionals about the AAFCO Model Regulations for Pet Food and Specialty Pet Food (also known as Model Pet Food Regulations).

The areas targeted for explanation included:

- ▶ History and philosophy behind the regulations;
- ▶ What the regulations mean; and
- ▶ How they should be applied to practical situations.

By all accounts, the workshop appears to have been successful in meeting its goals.

Why a workshop?

While certainly more user-friendly than the Code of Federal Regulations by which the US Food and Drug Administration operates, the AAFCO Model Pet Food Regulations that many states have chosen to adopt as part of their own state rules can at times be difficult to understand and apply. Dur-

The intent was to educate regulators and industry about the Model Pet Food Regulations.

— David Dzanis



ing the 1990s, a major petfood company facilitated a series of regulatory workshops to assist state feed control officials and others in better understanding the rules.

However, that series ended a number of years ago, so for the bulk of this decade, a similar resource has not been available. As many new people have since joined state regulatory offices or petfood companies, quite a few of those involved in regulation today have not had an opportunity to participate in such a venue.

But the workshop was not just for the new folks. Since the AAFCO rules seem to be amended almost every year, it can be a struggle for both regulators and industry to keep up to date. Thus, everyone attending, among whom I would include the presenters themselves, most likely came out of

the meeting with at least some new information or a new insight on an old issue.

Content still relevant today

The workshop started with some overviews of AAFCO, how products are regulated and an inside look at how petfoods are developed and manufactured. I especially enjoyed the discussion on the history of the Model Pet Food Regulations and how issues that affected the industry in the 1960s are still relevant in today's regulatory environment.

The bulk of the workshop was a breakdown of the Model Pet Food Regulations themselves. In general the discussion followed the format of the AAFCO Pet Food Regulations Label Review Checklist as found in the *AAFCO Official Publication* and the *AAFCO Pet Food and Specialty Pet Food Labeling Guide*. (In fact, having copies of both of these publications was a requisite for participating in the workshop.)

Most of the individual topics—for example, product name, guaranteed analysis, feeding directions—were presented by pairs of speakers, one

Must-have references

The publications used for the workshop were the *AAFCO Official Publication* and the *AAFCO Pet Food and Specialty Pet Food Labeling Guide*. I recommend anyone involved with regulation of petfood (whether in industry or government) have both of these readily available in his or her office. Order forms can be found at <http://www.aafco.org/Home/OrderAAFCOPublications/tabid/75/Default.aspx>.

from the government and one from industry. Many pairs chose to present the information via a dialogue between the two, with the industry person asking questions and the regulator offering sage responses. While the presenters perhaps did not quite reach the level of a George Burns and Gracie Allen comedy routine, that style of presentation proved enjoyable to the audience and hopefully facilitated the learning process.

The workshop was not just for the new folks.

A few topics merited discussion in this venue but didn't fall under the checklist format. Near the end of the workshop, I offered a brief discussion of issues specifically pertaining to specialty pet foods, nutritional supplements, treats and chews. Another presenter spoke on issues related to products that do not easily fall within AAFCO's purview, such as herbal supplements and other similarly marketed products.

What if you missed it?

Unfortunately, the workshop was not video or audio recorded. Reportedly, the slide set used in the presentations will be posted on both AAFCO's and PFI's websites. Check www.aaftco.org and www.petfoodinstitute.org regularly for updates. ●

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Has the time for DDGS arrived?

The production of ethanol has meant many things to the petfood industry—much of which hasn't been pleasant because of the pressure it has placed on grain supplies. Okay, so a cheap dollar, high fuel costs and a few natural disasters have had their impact as well.

But, maybe there is some redemption for ethanol production that petfood companies have overlooked these last few years. Redemption in the way of an ingredient—specifically the protein-enriched, spent-fermentation co-product known as distillers dried grains with solubles (DDGS). Currently, only a few of the “value brands” of petfood are brave enough to incorporate DDGS in their formulas. Considering consumers generally have a favorable view of “green” ethanol and petfood companies have a need to recapture some lost margin encountered with rising commodity prices, it may be time for the broader industry to explore its use.

Availability not an issue

The basic steps for today's ethanol production follow the same steps as that of distilled spirits:

- ▶ Grain is milled and fermented with yeast;
- ▶ The alcohol is removed by distillation; and
- ▶ The remaining wet residue is fed directly to livestock (predominantly cattle) or dried for use as an ingredient in the feed industry.

With DDGS, a dry milling process is used rather than a wet milling process that results in corn gluten feed or meal. Both types of processing are deployed for ethanol production, but the dry milling that results in the production of DDGS is more efficient, less capital intensive and subsequently more popular.

Is now the right time for this value-based ingredient in mainstream petfood?

— Greg Aldrich



This means availability is not an issue. Last year, 2.3 billion bushels of grain were used in the production of ethanol with nearly one-third of the starting biomass recovered as distillers grains. In other words, over 3.5 million metric tons of DDGS was produced.

Variability the theme

What do we know about DDGS? As it turns out, we know quite a bit about its nutrient composition, but only a smattering about its application in petfoods. Regarding nutrient composition, the theme of the day is variability. Most reference texts place protein concentration at around 27% or more. Fat, fiber and ash are also concentrated as the starch is fermented off (9.0%, 8.5%, and 4.7%, respectively; NRC, 2006). The proximate composition varies between seasons (Belyea *et al.*, 2004) and among producers (Spiels *et al.*, 2002) with no established industry or regulatory standard nutrient composition.

Adding to this variability, not all DDGS come exclusively from corn. Other feed grains can be and are used in the production of DDGS, and the net result will be an ingredient that is

somewhat reflective of the parent material. For that reason, the “predominating grain shall be declared as the first word in the name” on labels, according to the *AAFCO 2006 Official Publication*.

The amino acid profile differs little from that of the native grain, and the yeast fraction can contribute nearly half the amino acids. The fiber fraction is fermentable and a rich source of hemicellulose. The mineral composition is also variable with sodium content reported to fluctuate the greatest (Batal and Dale, 2003).

Direction from research

Work to evaluate this ingredient in petfood began nearly 50 years ago when distillers' grains were derived from the beverage and solvent industry. Since today only a small percentage of the overall DDGS supply is derived from this source, the research that was started in the late 1950s and continuing through to the 1980s doesn't completely apply. It does, however, give us some direction.

To summarize this battery of studies, the inclusion of DDGS at up to 30% of dog diets was reported to be acceptable; but, digestibility, stool consistency and palatability were measurably diminished. At intermediate levels of 9 to 16% of the diet, dry matter and energy digestibility were reported to decline 2 to 5 percentage points with an increase in stool volume. Including DDGS in diets

More online

Check out the archive of “Ingredient Issues” columns at www.petfoodindustry.com/ingredients.aspx.

at less than 8% did not affect dry matter or energy digestibility, alter nitrogen retention, hamper puppy performance or affect gestation or lactation. Unfortunately, no studies have been found that evaluated DDGS in cat foods.

More recent evaluations indicate that the protein quality of DDGS is superior to corn gluten meal; but this was due to a better amino acid profile rather than better digestibility (de Godoy *et al.*, 2008). Protein utilization of DDGS, especially the digestibility of the essential amino acid lysine, is sensitive to heat damage during the drying process (Fastinger *et al.*, 2006). This may be seen as a darkening or browning and can be a rough “eyeball” check for quality and process consistency.

No impact on extrusion

DDGS are seldom, if ever, found in wet petfoods or treats, but in extruded diets may be added at 5 to 12% of the formula. At these levels, the ingredient won't have an impact on extrusion or kibble appearance versus corn or other grains as it relates to expansion or cell structure.

However, if higher inclusion levels displace grains and protein meals like soy or corn gluten meal, expansion and functionality may be compromised due to lower starch content and a decline in functional proteins. Further, the fiber fraction of DDGS may require a fine grind to prevent the kibble from having a “fuzzy” surface.

Potential drawbacks

One drawback to DDGS is the potential to concentrate mycotoxins, especially given that fermentation and distilling do not destroy these mold metabolites. Nor is the ethanol industry obligated to operate under the same restrictions as the food and feed industries. In one extension report from South Dakota State University, mycotoxin concentrations for 2000 through 2007 were reported to be measurable in each testing year. Aflatoxin averaged 2.12 ppb (+/- 2.49), and vomitoxin averaged 3.62 ppm (+/- 4.12).

To put this in context, the USDA action levels for aflatoxin are 20 ppb.

Vomitoxin was reported to affect palatability at levels greater than 4.5 to 7.7 ppm and cause vomiting and diarrhea at 8 to 10 ppm for dogs and cats, respectively (Hughes *et al.*, 1999). So, while reported levels were below these thresholds, it points to the need for vigorous monitoring efforts. ●

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Research Notes

Fiber vs. fat cats

This study investigated the effects of feeding two foods with elevated

levels of total dietary fiber on satiety in cats. Both foods were formulated to contain similar levels of total dietary

fiber (TDF > 11.5% dry matter basis). The foods were fed to two groups of 10 cats for a period of 16 weeks in order to determine the effect of total dietary fiber on satiety. During the study, cats were given *ad libitum* access to the foods throughout the day. Food intake was recorded daily and body weight was recorded weekly to determine the effects of fiber on satiety and weight maintenance.

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Key Concept

➤ **Fiber vs. fat cats**

Satiety and body weight can be controlled in cats fed *ad libitum* with foods containing > 11.5% total dietary fiber.

During the study, body weight and intake did not change for both treatments. 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 both foods was efficacious in promoting satiety in cats. The results of this study demonstrate that satiety and body weight can be controlled in cats fed *ad libitum* with foods containing > 11.5% total dietary fiber.

Source: R.M. Yamka, *et al.*, 2008. Effect of total dietary fiber on satiety in cats. *FASEB J.* 22: 1117.2





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Keys to new product success

If the continuing growth of our industry is driven by trends such as humanization, health and convenience, those trends are manifest in new product development (NPD), which is exploding around the globe (see p. 26).

To delve into this important area, we convened a roundtable at Petfood Forum this past April in Chicago, Illinois, USA. Panelists included:

- ▶ Greg Aldrich, PhD, owner of Pet Food & Ingredient Technology Inc. in Topeka, Kansas, USA (and author of “Ingredient Issues,” p. 38);
- ▶ David A. Dzanis, DVM, PhD, DACVN, owner of Dzanis Consulting & Collaborations in Santa Clarita, California, USA (and author of “Petfood Insights,” p. 36);
- ▶ Patrick Moeller, a vice president with AFB International in St. Charles, Missouri, USA; and
- ▶ Robert Vigoureux, a consultant with Facta International Business Systems in Belgium.

These experts had many insights and tips, but a few themes stood out.

Blue sky or gut hunch?

Good ideas for new products or services can come from anywhere. Usually the process starts with customers (often via the sales force) and may encompass the supply chain and looking to other industries, such as human food, pharmaceutical and livestock/feed.

Google is famous for encouraging its employees to spend time working on projects that might lead to new

Hear it online!

Go to www.petfoodindustry.com/0810PETnpdroundtable.aspx to listen to an audio recording of the new product development roundtable.

You need a clear definition, agreement on the timeline and priorities.

— Debbie Phillips-Donaldson



products. But it's not just huge Internet companies that foster this type of innovation. Moeller described AFB's approach: “Our technical people have an opportunity to spend a percentage of their time on what we call ‘blue sky’ work,” he explained. “No targets; they have an idea, think of something, they try it out, demonstrate a proven principle.”

Sometimes a less formal NPD process works best, especially in smaller companies, Aldrich said. Some of his customers' best ideas come when the “CEO has a gut hunch, and they get it into the market quickly, give it a test drive and see if consumers embrace it.”

Time to shake it up

Thanks to increased consumer and industry focus on safety, our experts believe people are willing to consider big changes now. But developing truly innovative products may take a “disruptive technology,” something that requires changes in existing infrastructure—shaking up the status quo.

One example the panelists cited was Mars' WholeMeals product for dogs (see www.petfoodindustry.com/0804PETwhole.aspx). It didn't fit under the guise of adding a new ingredient or health claim, as many new products or line extensions do, Aldrich said. Rather, it was based on observing how dogs feed and adapting a product's form and

function to that behavior. And, “it's disrupted existing investments in manufacturing capabilities, packaging equipment, logistics software, warehousing and transportation to stores,” he added.

The growing number of less processed petfoods—often frozen or refrigerated—also require new ways to transport and display them in stores, as well as new processes such as pasteurization or irradiation. Dzanis described the latter as a “great additional step in ensuring safety from a microbiological standpoint” but acknowledged that consumers and manufacturers might be reluctant to embrace it.

Don't miss the window

Education is often key to how a new technology or product fares in the marketplace. But first it has to get out the plant door. For a successful new product launch, our experts said, you need clear definition of the product, agreement by all involved on the launch timeline and priorities. “Separate what you want from what you need—the ‘must haves’ from the ‘nice to haves,’” Moeller said. “If those distract you from your needs, you may miss your window.” ●

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

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