

January 2009

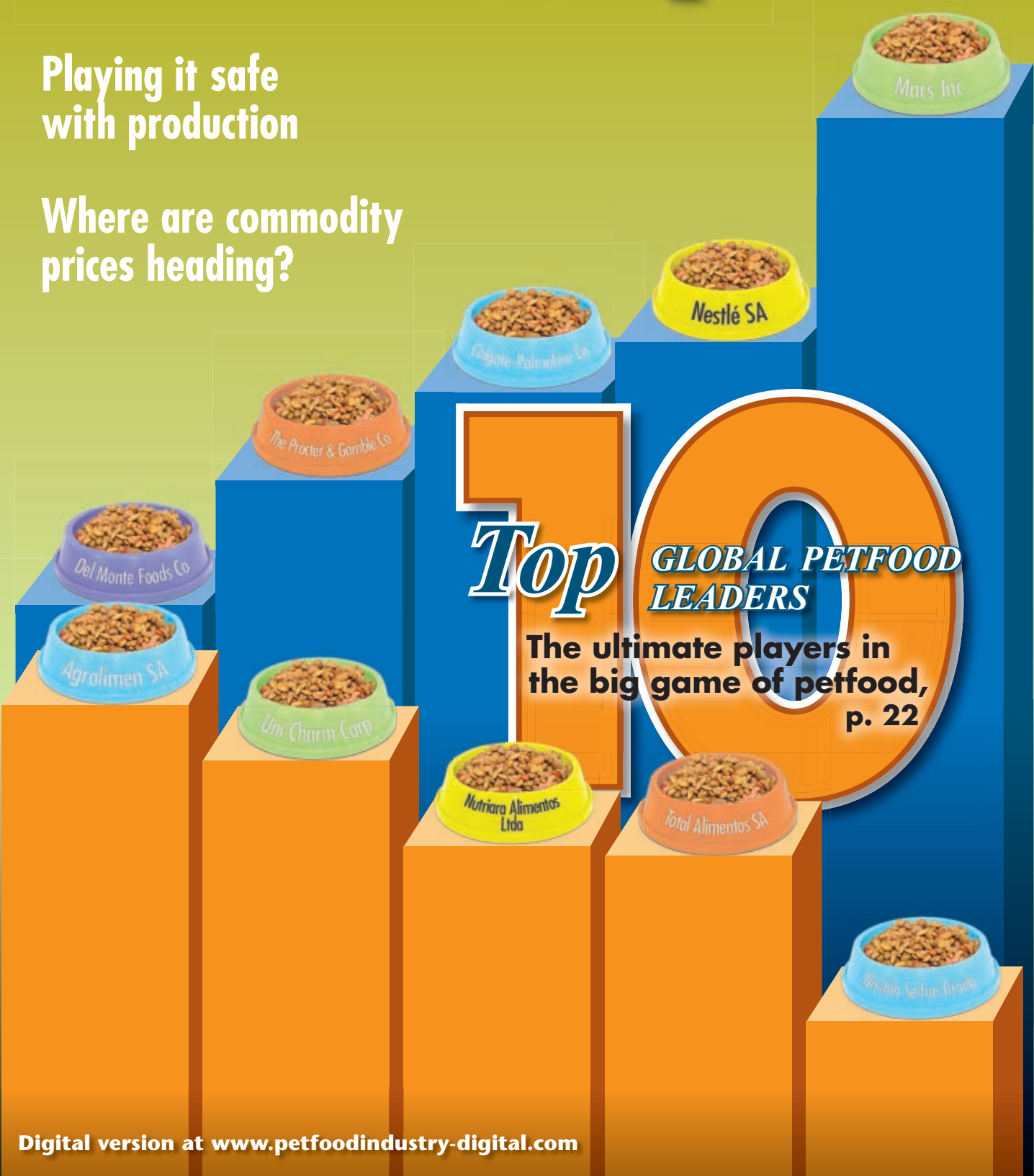
Petfood Industry

WATT

www.petfoodindustry.com

Playing it safe
with production

Where are commodity
prices heading?



Top

GLOBAL PETFOOD LEADERS

The ultimate players in
the big game of petfood,
p. 22

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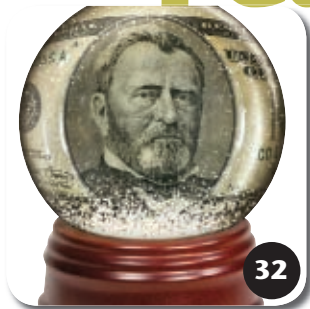


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3. Industry Calendar: Keep your schedule synced up with the most important events in petfood, plus related industries. www.petfoodindustry.com/EventCalendar.aspx

Exclusive Web content

1. NASC and supplement safety

Read the National Animal Supplement Council's full response to the new report on supplement safety.

www.petfoodindustry.com/0901PETfeedback.aspx



2. More on the top 10 Read in-depth profiles of these key players in the industry. www.petfoodindustry.com/0901PETtop10.aspx

3. Protein alternatives Sonac, a leading supplier of meat-derived by-products, explains new types of ingredients it's developing. www.petfoodindustry.com/0901PETcommodity.aspx



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Pennsylvania pursues puppy mill reforms

A new Pennsylvania law aims to improve alleged “puppy mills.” Here are some of the law’s stipulations:

- ▶ It doubles the minimum floor space for cages;
- ▶ It requires regular outdoor exercise in an area at least twice the size of the dog’s primary enclosure;
- ▶ It prohibits the use of wire flooring and requires flooring that allows for moderate drainage;
- ▶ It prohibits the stacking of cages;
- ▶ It requires veterinary examinations semi-annually;
- ▶ It mandates that only a veterinarian may euthanize an animal; and
- ▶ It requires unlimited access to water.

In my opinion, these are all steps in the right direction. The US Department of Agriculture-Animal and Plant Health Inspection Service (USDA-APHIS) lists more than 4,000 people and facilities as licensed breeders, so the law is good news for many thousands of dogs. I hope other states use Pennsylvania’s law as a model.

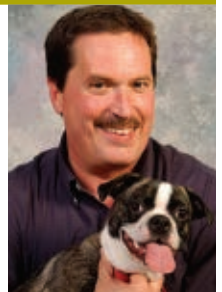
Preying on consumers

Puppy mills are nothing new. These mass dog-breeding operations have been around for decades. They continue to thrive because they prey on unwitting consumers who are smitten by puppies in pet store windows and on fancy websites.

But, too often, behind the friendly facade of the local pet shop, the pastoral scenes on a “breeder’s” website or the neighborhood newspaper ad, there may lie a puppy mill. These canine breeding facilities house dogs in

Enforcement has historically been spotty at best.

— Tim Phillips



shockingly poor conditions.

Life is particularly bad for “breeding stock,” dogs that live their entire lives in cages and are continually bred for years, without human companionship and with little hope of ever becoming part of a family. These dogs receive little veterinary care and never see a bed, treat or toy. After their fertility wanes, breeding animals are commonly killed, abandoned or sold to another mill. The annual result of all this breeding is hundreds of thousands of puppies, many with behavior and/or health problems.

Several hundred thousand puppies are shipped cross-country to be sold in pet shops, but many are sold via newspaper classifieds or websites and are often accompanied by false claims such as, “We’d never sell puppies from a puppy mill” or promises that the puppies are “home raised, farm raised or raised with kids/grandkids.” The ploys of the puppy mill are designed to dupe a well-intentioned family into buying a puppy and keeping the engine of cruelty working overtime.

Law and order

Because a puppy mill is a business, the facility is designed purely for prof-

it, not for the well-being of dogs. Laws are on the books to provide minimum care standards for puppy-mill animals, but enforcement has historically been spotty at best.

The USDA licenses and inspects “commercial breeding facilities” for violations of the Animal Welfare Act. Also, a handful of states have laws that provide oversight of some breeding operations. But puppy mills can successfully navigate around these laws, either by selling directly to consumers (thereby avoiding USDA licensing requirements) or by simply avoiding the reach of law enforcement (with so few USDA inspectors and minor fines, it’s easy to stay in business). Note that research facilities, such as those that test petfood palatability, are exempt—they already are subject to the Animal Welfare Act.

Congratulations to Pennsylvania for its humane efforts. It has set a good example for other states. ●

Dr. Phillips is the editor of Petfood Industry magazine. He can be reached at Tel: +1.815.966.5544, E-mail: tphillips@wattnet.net.

Marketing wanted to tell you that we had a handle on the latest innovation in pet food packaging.

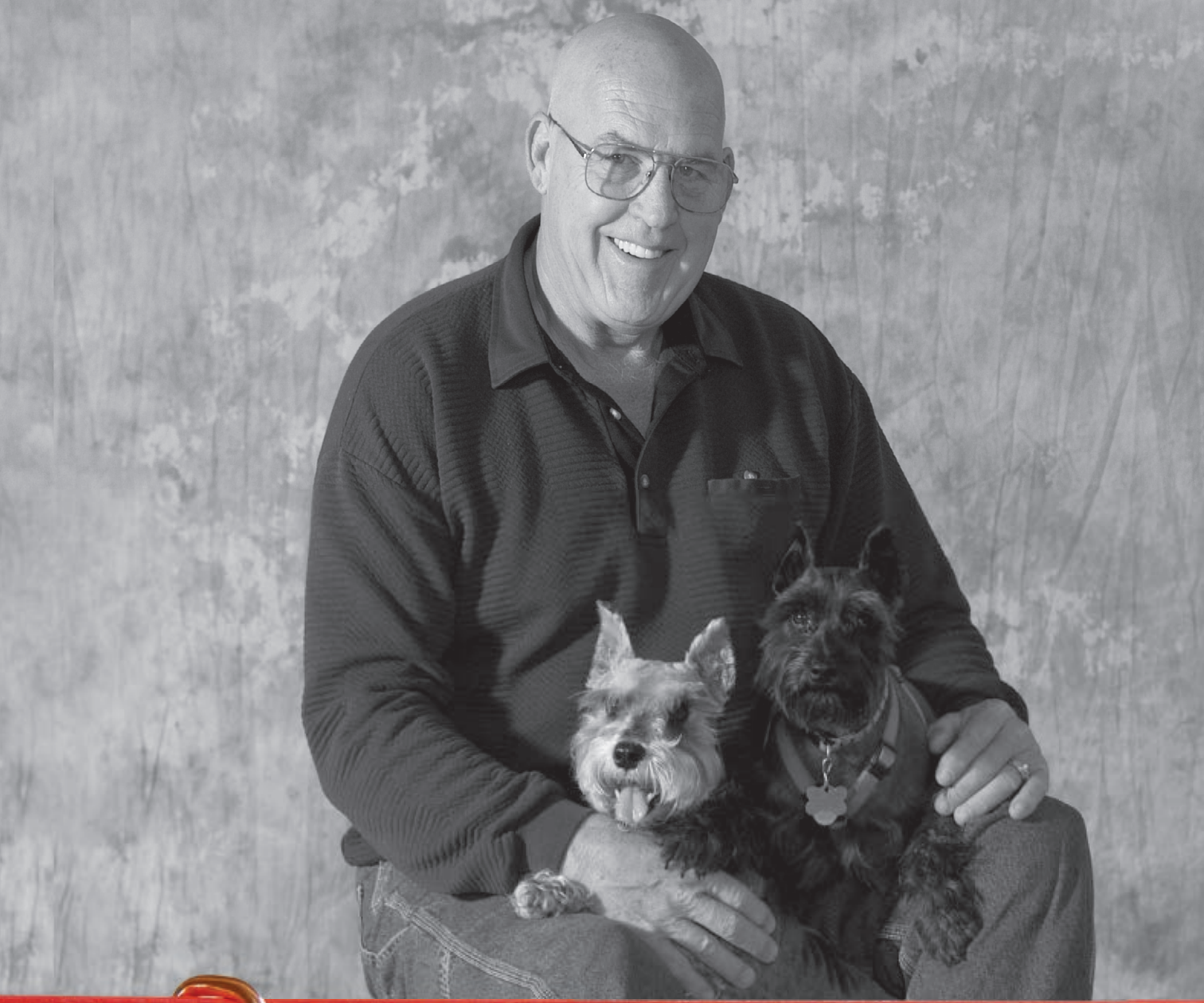


[Naturally, we had to put a stop to that.]

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Quick hits

- ▶ The trade magazine *PET in Europe* is changing its title to *PET Worldwide*, effective with the January 2009 issue.
- ▶ Canidae All Natural Pet Foods will be the primary sponsor of the Canidae MotoSport Kawasaki team for the 2009 Monster Energy AMA Supercross, an FIM Championship, and the Toyota AMA Motocross Series.
- ▶ Bentoli AgriNutrition plans to intensify focus in South and Central America.
- ▶ K9 Confections introduces a new website, www.k9confections.com, and announces a new line of premium all-natural organic dog and cat treats.
- ▶ Buhler Inc. announces the achievement of American Customer Satisfaction Index and Net Promoter Score ratings that exceed national averages.

New Petfood Forum blog—plus early bird savings!

A new Petfood Forum blog at www.petfoodindustry.com will keep you abreast of new speakers, presentations and other exciting news about Petfood Forum 2009 and the new Petfood Workshop: Essential Training.

And, if you register by February 20, you can save up to 15%. Visit www.petfoodindustry.com/petfoodforum.aspx.

Petfood Forum 2009 will take place April 20-22, 2009, at the Hyatt Regency O'Hare Hotel near Chicago, Illinois, USA.

The keynote speaker will be Marty Becker, DVM, popular veterinary author and regular contributor to *Good Morning America*. His specialty is the power of the bond between pets and their people.

Petfood Workshop: Essential Training will take place April 22-23, 2008. This seminar will provide a thorough overview of the industry, including three exciting general sessions:

- ▶ **Market data**—Lee Linthicum, Euromonitor;
- ▶ **New products**—Krista Faron, Mintel;
- ▶ **Industry structure**—Tom Willard, consultant.

Plus, break-out sessions offer interactive workshops on four key areas of petfood:

- ▶ **Nutrition and ingredients**—Greg Aldrich, PhD, Pet Food & Ingredient Technology;
- ▶ **Regulatory**—David Dzanis, DVM, PhD, DACVN, consultant;
- ▶ **Processing/production**—Galen Rokey, Wenger;
- ▶ **Packaging**—Packaging Machinery Manufacturers Institute.

For more information, contact Jackie Thrash, Tel: +1.404.760.2823, Fax: +1.404.240.0998, E-mail: petfoodforum@meetingexpectations.com; or Ginny Stadel, Tel: +1.815.966.5591, Fax: +1.815.968.0941, E-mail: gstadel@wattnet.net. By mail: Petfood Forum/Workshop 2009, c/o Meeting Expectations, 3525 Piedmont Road NE, Building 5, Suite 300 Atlanta, Georgia 30305-1509 USA.



Informative sessions include:

- ▶ Rick Rockhill, VP of dog food consumables for Petco, on what pet retailers want from the petfood industry;
- ▶ Petfood market update: the value equation, David Lummis, Packaged Facts;
- ▶ Guerrilla marketing strategies, Vicki Lynne Morgan, Russmor Marketing Group;
- ▶ The changing world and the impact upon new product development, John Adams, consultant;
- ▶ Packaging and marketing to the new age of pet parents, Jim Morris, Morris Packaging and Heartland Ingredients;
- ▶ Health and wellness in the global petfood market, Lee Linthicum, Euromonitor;
- ▶ Performing Veterinary Oral Health Council protocols, Amy Dalickas, Summit Ridge Farms;
- ▶ Probiotics in veterinary nutrition, Anton Beynen, Beynen Nutrition;
- ▶ Chelated trace minerals, Ron Rompala, Blue Seal, and Tom Best, Trouw;
- ▶ Petfood's biggest hurdle: ingredient approval, Jarrod Kersey, American Feed Ingredients Association;
- ▶ The supplement side of ingredient safety and regulation, Bill Bookout, National Animal Supplement Council;
- ▶ Creating and managing household panels, John Presutti, Market-i Research Services;
- ▶ Cytotoxicity testing and quality management, Jennifer Radosevich, Kemin;
- ▶ How energy sources impact production costs, product characteristics and the environment, Galen Rokey, Wenger;
- ▶ Functional properties of plasma proteins, Javier Polo, APC Europe;
- ▶ New European petfood regulations, Dr. Wolfgang Trunk, European Commission; and
- ▶ Managing your unsaleables (damaged product), Debbie Grosh, DLD Strategies.

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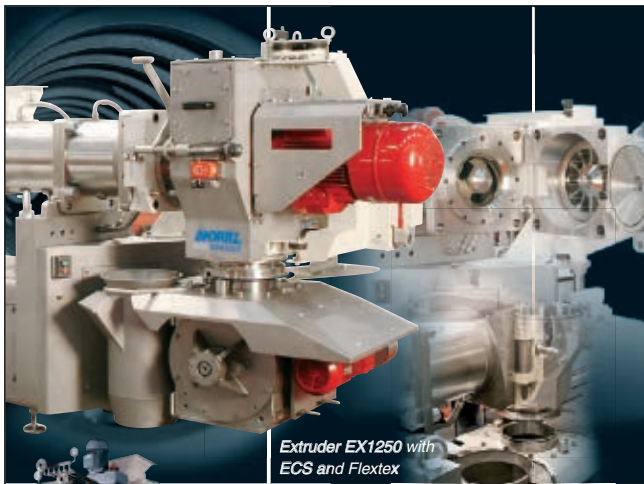
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PETFOOD INDUSTRY GLOBAL

Champion Petfoods blames Australian government. Champion Petfoods of Alberta, Canada, said it is pulling out of the Australian market after independent tests on its Orijen brand of cat food showed dangerous levels of irradiation, which is mandated by the Australian government. The levels of irradiation, according to the company, depleted levels of vitamin A and caused the outbreak of serious illness among Australian cats.

Australia is the only country of the 50 that import Orijen cat food that demands petfood be irradiated, Champion says. The irradiation is required because the food is not highly processed or cooked at the same high temperatures as other imported petfoods.

A spokesman for the Department of Agriculture, Fisheries & Forestry said Australia required all dry and semi-dried petfood to be either heat-treated or irradiated, and Orijen was just one of a number of petfood manufacturers that export to Australia.

China admits to melamine use. Chinese authorities have admitted that some ingredients used to make petfood did contain melamine. According to a report in *USA Today*, the admission led to increased investigations into two Chinese companies and their links to extensive animal food recalls here. It also noted that China claims melamine did not harm pets.

“There is no clear evidence showing melamine is the direct cause of the poisoning or death of the pets ... China is willing to strengthen cooperation with the US side ... to find out the real cause leading to the pet deaths to protect the health of the pets of the two countries,” Beijing’s Ministry of Foreign Affairs was quoted by *USA Today*.

The US Food and Drug Administration announced it will be going to China to conduct inspections.



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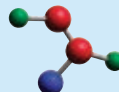
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22	23	24	25	26	27	28

19th Annual Feeds & Pet Food Extrusion Short Course

February 1-6, 2009, Texas A&M University, College Station, Texas, USA. Contact: Dr. Mian Ruiz, Tel: +1.979.845.2774, Fax: +1.979.458.0019, mnriz@tamu.edu, www.tamu.edu/extrusion.

Global Pet Expo

February 12-14, 2009, Orange County Convention Center, Orlando, Florida, USA. Contact: APPMA, Tel: +1.203.532.0000, Fax: +1.203.532.0551, globalpetexpo.org/contactus.asp, globalpetexpo.org.

March

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ZooExpo, March 21-22, 2009, Exporama Trade Fair Centre, Oslo, Norway. Contact: Norwegian Pet Trade Association (NZB), zooexpo@nzb.no, www.nzb.no.

April

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26	27	28	29	30		

H.H. Backer Spring Trade Show

April 3-5, 2009, Atlantic City, New Jersey, USA. Contact: H.H. Backer Associates Inc., Tel: +1.312.663.4040, Fax: +1.312.663.5676, hhbacker@hhbacker.com, www.hhbacker.com.

Petfood Forum, April 20-22, 2009, Hyatt Regency O'Hare, Chicago, Illinois, USA. Contact: Jackie Thrash, Tel: +1.404.760.2823, Fax: +1.404.760.0998, petfoodforum@meetingexpectations.com, www.petfoodindustry.com.

Petfood Workshop: Essential Training

April 22-23, 2009, Hyatt Regency O'Hare, Chicago, Illinois, USA. Contact: Jackie Thrash, Tel: +1.404.760.2823, Fax: +1.404.760.0998, petfoodforum@meetingexpectations.com, www.petfoodindustry.com.

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UK petfood market gains from humanization

UK pet owners' tendency to humanize their animals has led to a greater willingness to indulge them with accessories and treats, according to an article on Brand Republic.com.

This has created market expansion that mimics those found in items for humans including treats, gifts and services such as grooming. Petfood is the biggest category in this market, and thanks to the rise in premium products it has grown in value, though it is uncertain whether this will continue in the economic downturn.

Petfood mirrors the trends seen in groceries as a whole—convenience, improved packaging, natural ingredients and a shift to premium products are noticeable. In health terms, pets are suffering from similar complaints as their owners, such as obesity and age-related problems.

UK spending on petfood and pet care rose 14% between 2003 and 2007, says the article, and Mintel predicts the market will reach a value of almost £3 billion (US\$4.6 billion) in 2008. Mintel also anticipates that by 2013 the market will be worth £3.4 billion (US\$5.2 billion)—a rise of 14% since 2008. With inflation taken into account, this equates to 2% growth in real terms, said the article.



Wenger Industry Poll

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Del Monte has high expectations for 2009

With an 18.7% increase in pet product sales during the second quarter, Del Monte Foods Co. of San Francisco, California, USA, has high expectations for its fiscal year 2009, according to a story from PetProductNews.com.

The company expects sales for the year to grow between 8 and 10% during fiscal year 2008 (earlier forecasts predicted between 6 and 8%). According to the story, the company had pet product sales of US\$409.1 million for its second quarter ending October 26, 2008, compared to US\$344.6 million in the same period in 2007.

Del Monte said increasing pet product growth, outpacing an overall sales growth rate of 11.5% for the quarter, is due to pricing actions for petfood and pet snacks, new product volume (primarily from Meow Mix product introductions) and existing product volume growth.

Alltech Young Scientist Program receives record number of applicants

Alltech, a global leader in animal health and nutrition, has received a record number of applicants to its Young Scientist Program—842 students have already submitted applications globally.

“In a year of gloom and doom in the world economy, it is thrilling for us to see so many young minds interested in our industry,” said Dr. Pearse Lyons, president and founder of Alltech. “The Alltech Young Scientist Program is an incredible venue for undergraduate and graduate students to involve themselves professionally in animal science on a global level.”

The winners of the undergraduate and graduate Young Scientist Awards will be announced during Alltech’s 25th International Animal Health and Nutrition Symposium May 17-20, 2009, in Lexington, Kentucky, USA.

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Victam, Petfood Forum announce new events

Victam recently announced two events—Victam Asia 2010 & FIAAP Asia 2010 and GRAPAS Asia 2010, according to FeedLink.

The former will be held March 3-5, 2010, at the Queen Sirikit National Convention Center in Bangkok, Thailand,



with a greater emphasis on biomass and bio-energy. Petfood Forum Asia 2010 will be a one-day conference as part of Victam Asia 2010.

GRAPAS Asia 2010 will include suppliers of equipment, technology and ingredients for flour milling and grain and rice processing.

For more information, visit www.victam.com.

Websites give food to shelters

About 35,000 people a day are clicking on two websites to help feed 1,200 dogs and cats. The sites grew from a dream of 12-year-old Mimi Ausland of Bend, Oregon, USA. She asked a local pet store if it would contribute food if people went online and clicked to donate. The owners agreed to donate 10 kibbles per click, and freekibble.com was launched April 1. Within two months, information about the site had gone national, and the store couldn't keep up with the demand.

When the Auslands looked for national companies to help, Castor & Pollux of Clackamas, Oregon, USA, volunteered. Food is now being donated to nine shelters or groups in Florida; Forsyth County and Portland, Oregon; Chicago, Illinois; and New York. A sister site, freekibblekat.com, launched in June.



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Feedback

NASC responds to report

I am writing in response to “NRC publishes new report on supplement safety” (“Petfood Insights,” November 2008, p. 36).

The report came from a committee formed by the National Research Council (NRC). While not a committee member, as president of the National Animal Supplement Council (NASC) I was asked to make presentations and submit information. In addition, I and other experts reviewed the committee’s findings and provided comments.

While I believe some of the report’s conclusions are technically correct with respect to safety under the current system of evaluating and approving feed in-

gredients, animal owners who use these products and businesses who sell them should realize this is complex. Readers of NRC’s oversimplified brief or articles based on it may have the impression that the animal supplement industry has not made an effort to monitor product quality, safety and risk or establish a system of responsible conduct. Those familiar with NASC know this is inaccurate.

NASC was established in 2002 because current laws were developed prior to the widespread use of animal supplements. Most stakeholders agree that applying drug laws or feed laws to animal supplements under existing regulations does not work. NASC’s mission is to

work cooperatively with state and federal regulatory agencies to ensure animal owners continue to have access to these products, while creating rigorous systems to ensure quality and risk management for products and ingredients.

*Bill Bookout, President
NASC
Valley Center, California, USA*

To read more from NASC,
please see www.petfoodindustry.com/0901PETfeedback.aspx.

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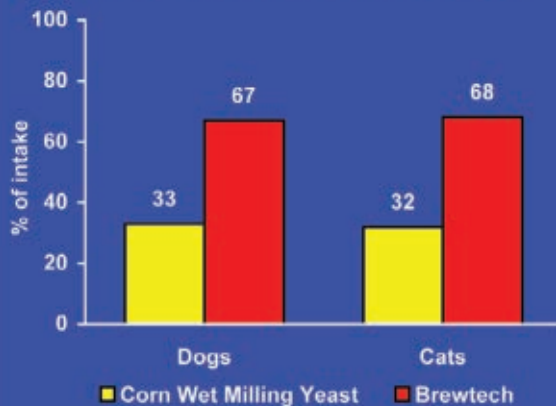
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Find more new products at www.petfoodindustry.com.

To submit products, contact Tara Leitner, Tel: +1.815.966.5421, Fax: +1.815.968.0941, tleitner@wattnet.net.

New on the Shelves

Nutri-Vet salmon puffs >>

Nutri-Vet now offers Alaskan Salmon Puffs treats for dogs. Omega-3 essential fatty acids from wild, non-farmed Alaskan salmon, natural blueberries, cranberries and sweet potatoes all are in the puffs. According to the company, the treats contain no artificial colors, preservatives or flavors and are available in a 4-ounce resealable bag. www.nutri-vet.com

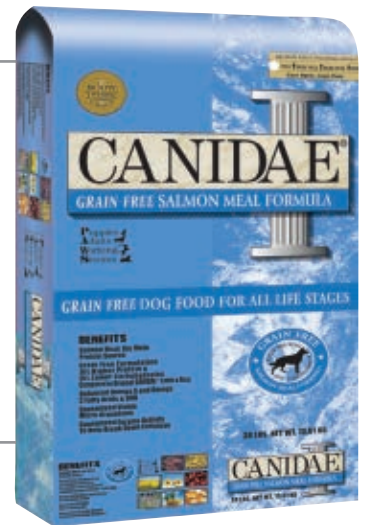


<< Dry food for dogs

Dogswell recently added dry food for dogs to its line. The company's Happy Hips and Vitality Chicken & Oats Recipes feature chicken, carbohydrates, fresh fruits, vegetables and minerals. Happy Hips was designed for adult dog joint maintenance, and Vitality contains omega-3 and 6 fatty acids and vitamins A and E to help maintain healthy skin and shiny coats for dogs. www.dogswell.com

Grain-free dog food >>

Canidae offers Grain Free Salmon Meal Formula for dogs, made with 80% meat protein and 20% fruits and vegetables, designed to increase energy levels. The grain-free product contains no corn, wheat, soy, grain fractions, glutes or fillers, according to the company. The formula is available in 5-, 15- and 30-pound bags. www.canidae.com

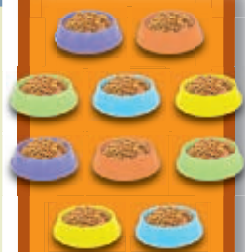


<< Natura relaunches Innova

Natura Pet Products recently relunched its flagship Innova brand. Products in the brand follow a holistic formula and include ingredients from meat, dairy, vegetable, fruit and grains groups, according to the company. Included in the relaunch are the company's Adult Dog Food—Large Bites and Cat and Kitten Food. www.innovapet.com

Top GLOBAL PETFOOD LEADERS

The ultimate players in the big game of petfood



BY JESSICA TAYLOR

Nutro, Goodlife Recipe, Whiskas, Greenies, Royal Canin

New products: Sheba Premium Cuts, Cesar Single Pouches, Whiskas Oh So ... (UK), Whiskas Steam Cooked Pouches, Whiskas Purrfectly Chicken, Whiskas Purrfectly Fish, Pedigree Joint Care Dog Treats (UK), Royal Canin Mini Dachshund, Royal Canin Medium Bulldog, Royal Canin Active Mature for Cats

Websites: www.mars.com; www.marspetcare.com

There are more varieties of Pedigree dog food than any other petfood brand in the US, and Whiskas cat food is available in more than 40 markets worldwide, according to Mars Petcare. The pet division of Mars Inc. can continue to make such impressive boasts as the petfood giant remains on top of the heap, while always innovating and growing. Sales across its core brands, such as Cesar, Whiskas and Sheba, have remained strong despite a voluntary US recall in late 2008 because of possible *Salmonella* contamination.

Ol' Roy dog food and Special

1 Record growth is still expected for the global petfood market, driven by strong performance in emerging markets.

Kitty cat food were removed from grocery shelves, and consequently the Everson, Pennsylvania, USA, plant where the contamination was first detected was shut down.

Regardless of such setbacks, newer brands such as Goodlife Recipe, WholeMeals and Nutro (which Mars acquired in May 2007) are adding great depth to this petfood monolith's ever-growing portfolio of products. Not only topping the chart in total sales of dog and cat food (see Table 1), Mars Petcare also finds itself leading the pack when it comes to

Worldwide retail sales of dog and cat food topped US\$45 billion in 2007, according to data from Euromonitor International. That's a total growth of almost 43% from the 2002 amount of US\$31.57 billion, and according to Euromonitor, global retail sales of petfood will only continue to grow. Market researcher David Lummis of Packaged Facts contends there are three primary

Running with the big dogs

The global petfood market is currently riding a strong wave of growth, especially in emerging markets. Take Brazil, for example, whose companies Total Alimentos SA and Nutriara Alimentos Ltda. have already begun climbing from last year's positions in the top 10 to more secure spots in the ranking. Dropping off the list this year is Nutro Products Inc., which was bought by Mars Inc. in May 2007. Replacing it is Japanese company Nisshin Petfood Inc., subsidiary of Nisshin Seifun Group.

1. Mars Inc.

World headquarters: McLean, Virginia, USA (Mars Petcare: Franklin, Tennessee, USA)

Approximate 2007 global retail sales: US\$11.8 billion

Officers: Luc Mongeau, president, Mars Petcare US

Top brands: Pedigree, Cesar, Sheba,

Online extra!

Read more about the top 10 companies at www.petfoodindustry.com/0901PETtop10.aspx.

trends driving growth in the international petfood and pet treats market: humanization, convenience and health. Even with the world going through an economic crisis, indicators continue to bode well for the ongoing expansion of the global petfood market, which just may be recession proof.

new product launches, with 254 SKUs in cat food products and 248 SKUs in dog food products (see Tables 3, p. 25, and 4, p. 28). With its acquisitions over the past few years, pet products are now a larger part of Mars North America sales than its snack foods division.

2. Nestlé SA

World headquarters: Vevey, Switzerland (Nestlé Purina PetCare: St. Louis, Missouri, USA)

Approximate 2007 global retail sales: US\$10.9 billion

Officers: W. Patrick McGinnis, CEO, Nestlé Purina PetCare; Terrance Block, president, PetCare NA; Rock Foster, CFO

Top brands: Purina, Purina One, Alpo, Beneful, Busy Bone, Chew-rific, Deli-Cat, Dog Chow, Fancy Feast, Friskies, Gourmet Gold, Mon Petit, HiPro, Kibbles and Chunks, Kit 'N Kaboodle, Mighty Dog, Pro Plan, TBoonz, Purina Veterinary Diets, Whisker Lickin's

New products: Pro Plan Shredded Blends, Alpo Chophouse Originals, Beneful Playful Life, Beneful Snackin' Slices, Pro Plan Selects Dry Dog Food

Websites: www.nestle.com; www.purina.com

According to Euromonitor, Nestlé had a 5% year-to-year sales growth from 2006 to 2007 (see Table 2, p. 24). Last year (2007-2008), Purina PetCare generated sales growth of about 6% to 7%, depending on foreign exchange rate variables considered, according to *St. Louis Business Journal*. The division achieved 9.5% organic growth during the first three months of 2008, including double-digit growth in markets outside the US and Europe, according to its first-quarter report. "(Purina PetCare) organic growth continued to be driven by strategic brands, new product launches and product mix improvements," Nestlé stated in the report.

Superpremium brands appear to be a growing strength for the division. Purina PetCare consumer research found there was an unmet demand for "a dog food that went beyond keeping dogs healthy and active," according to its annual re-

Table 1: Top 10 in global petfood

Approximate global dog and cat food sales in 2007 place these 10 companies at the top of the petfood chain. Source: Euromonitor International

Company	2007 retail sales US\$ billions	Year-on-year growth % 2006-07
Mars Inc.	US\$11.8	9.8%
Nestlé SA	US\$10.9	5%
Colgate-Palmolive Co.	US\$3.0	8.3%
Procter & Gamble Co.	US\$2.99	3.4%
Del Monte Foods Co.	US\$1.7	1.5%
Agrolimen SA	US\$.61	4.3%
Uni-Charm Corp.	US\$.31	4.1%
Nutriara Alimentos Ltda.	US\$.27	39.1%
Total Alimentos SA	US\$.23	19%
Nisshin Seifun Group	US\$.20	1.9%

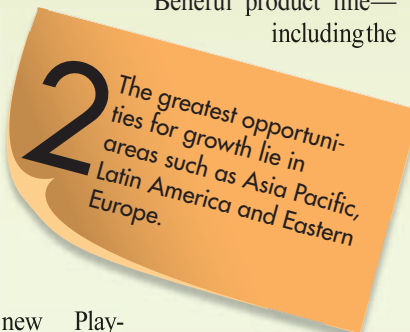
port. Purina PetCare conducted a limited launch of Beneful in the US beginning in 2006 and has captured 6% market share in its targeted markets, according to the *St. Louis Business Journal* 2008 article. In the hope of expanding on that success, the company rolled out the Beneful product line—including the

Officers: Robert Wheeler, Hill's Pet Nutrition CEO; Neil Thompson, Hill's Pet Nutrition president of Americas; Janet Donlin, Chief Veterinary Business Channel

Top brands: Hill's Science Diet, Hill's Prescription Diet

New products: Healthy Development Original Puppy and Kitten, Nature's Best Dog and Cat, Tender Chunks in Gravy Cat

Websites: www.colgate.com; www.hillspet.com; www.hillsvet.com



new Playful Life blend and the Snackin' Slices dog treats—nationally during first quarter 2008. In addition to Beneful, Purina PetCare's superpremium cat foods under the Fancy Feast, Gourmet Gold and Mon Petit brands also are performing well, according to the company.

3. Colgate-Palmolive

World headquarters: New York, New York, USA (Hill's Pet Nutrition: Topeka, Kansas, USA)

Approximate 2007 global retail sales: US\$3.0 billion

Hill's Pet Nutrition just squeaked by P&G Pet Care in total global retail sales, according to Euromonitor, with US\$3 billion (see Table 1). With a strong 8.3% year-to-year growth rate (Table 2, p. 24), Hill's continues to measure its success by building and strengthening relationships in the veterinary profession, while focusing on continuous innovations in health, wellness and therapeutic petfood nutrition.

Holding the third and fourth position in new product launches for cats and dogs, respectively, Hill's continues to expand its core brands with Science Diet Healthy Development Original Puppy and Kitten formulas, Science Diet Nature's Best dry food for Cats and Science Diet Tender Chunks in Gravy Cat. Hill's also relied on its veterinary alliances to help spotlight a variety of pet health concerns and spread consumer awareness this year, including about

dental health, canine cancer, pet obesity and proper pet diet.

4. Procter & Gamble

World headquarters: Cincinnati, Ohio, USA (P&G Pet Care: Dayton, Ohio, USA)

Approximate 2007 global retail

sales: US\$2.99 billion

Officers: A.G. Lafley, CEO and chairman

Top brands: Eukanuba, Iams

New products: Iams Veterinary Formulas Feline and Canine (in wet and dry), Eukanuba Naturally Wild Dry Dog Food

Websites: www.pg.com; www.eukanuba.com, www.iams.com

3 The global petfood market is very consolidated with the five largest companies accounting for almost 50% of value sales in 2007.

Despite much speculation whether Procter & Gamble would sell their petfood brands after the 2007 recalls and dropping sales and shares, P&G Pet Care remains a fixture on this year's top 10 list, although falling one position from the previous year. P&G Petcare managed a healthy US\$2.99 billion in retail sales in 2007, with a strong showing in new product launches in both dog and cat food (Tables 3, facing page, and 4, p. 28).

The company has followed trends this year such as health and wellness, humanization and natural with its US product launches. P&G's Iams brand released Veterinary Formulas for cats, dogs and puppies in both wet and dry varieties, including formulas targeting skin and coat, intestinal problems, urinary problems, multistage renal, weight

Table 2: Top 10 global growth leaders

These petfood companies experienced the highest % of year-on-year growth (2006 to 2007). Source: Euromonitor International

Dog and cat food	% change
Nutriara Alimentos Ltda.	39.1%
Total Alimentos SA	19%
Mogiana Alimentos SA	17.3%
Prosper de Mulder Ltd.	10.7%
Mars Inc.	9.8%
Colgate-Palmolive Co.	8.3%
Champion SA	7.4%
Nestlé SA	5%
VIP Petfoods Pty Ltd.	4.4%
Agrolimen SA	4.3%

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Table 3: Top 10 new cat product launches

The top companies for new global cat food product launches in 2008. Source: Mintel Global New Products Database

Company	Number of new products*
Mars Inc.	254
Nestlé SA	178
Colgate-Palmolive Co.	47
Procter & Gamble Co.	34
Nisshin Seifun Group	31
Del Monte Foods	22
Almo Nature	19
Affinity Petcare	14
MPM Products	13
Bennet	13
Total Sample	1,135

*January 1, 2008 through December 2, 2008

loss, weight control and joint health. Eukanuba also introduced a new line of dry dog food named Naturally Wild in formulas such as New Zealand Venison & Potato, North Atlantic Salmon & Rice and Country-Grown Turkey & Multigrain. The natural formulas tout natural fish oil, antioxidants and a claim of no meat by-products or corn, according to the company.

5. Del Monte Foods

World headquarters: San Francisco, California, USA

Approximate 2007 global retail sales: US\$1.7 billion

Officers: Richard G. Wolford, chairman, president and CEO; Jeff Watters, Del Monte Pet Products senior VP

Top brands: Meow Mix, Kibbles n' Bits, 9Lives, Milk-Bone, Pup-Peroni, Pounce, Gravy Train, Jerky Treats, Canine Carry Outs, Snausages, Nature's Recipe (Cat and Dog), Alley Cat, Meaty Bone

New products: Nature's Recipe Farm

Stand Selects Sliced Treats, Nature's Recipe Healthy Skin & Coat Treats, Nature's Recipe Joint & Hip Treats, Nature's Recipe Teeth & Breath Treats, Pup-Peroni 50 Calorie Snack Pouch, Kibbles 'n Bits Wholesome Medley

Website: www.delmonte.com

Del Monte Pet Products grabbed the number five position for the second

year in a row, earning US\$1.7 billion in 2007 and 1.5% year-to-year growth rate (Table 1, p. 23). "I am pleased with the company's (sales) performance driven by strong volume, primarily in consumer products, as well as effective pricing actions and successful new product sales," said CEO Richard G. Wolford in

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Table 4: Top 10 new dog product launches

Top 10 companies for new global dog food product launches in 2008. Source: Mintel Global New Products Database

Company	Number of new products*
Mars Inc.	248
Nestlé SA	139
Del Monte Foods	35
Colgate-Palmolive Co.	33
Pets at Home	31
Procter & Gamble Co.	25
Nature's Gift	20
Lion Corp.	19
Herrmanns Hundefutter	18
Progetto Europa	17
Total Sample	1,868

*January 1, 2008 through December 2, 2008

a 2008 statement. "However, our businesses continue to be negatively impacted by inflationary cost pressures ... and cost increases." One of the contributors to reduced profits and higher expenses was an undisclosed amount of general and administrative expenses related to Del Monte centralizing the marketing and certain related functions of its pet-food operations in San Francisco, California, USA, relocating the operations from Pittsburgh, Pennsylvania, USA,

the company said.

Del Monte snagged 35 SKUs in new dog product launches this year (Table 4), with the help of such products as the 50 Calorie Snack Pouch treats for dogs, which relied heavily on the humanization and pet wellness trend. Marketers for Del Monte in 2008 followed another trend by developing television programs that are centered on their products. The Meow Mix line of cat food from Del Monte underwrote a game show for the Game Show Network cable channel in the US.

6. Agrolimen SA

World headquarters: Sant Cugat del Vallés, Spain (main plants/facilities: El Monjos, Spain; La Chapelle Vendomôise and Moulins, France)

Approximate 2007 global retail sales: US\$0.61 billion

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

Top brands: Affinity, Ultima, Brekkies, Brekkies Excel, Advance, Advance Veterinary Diets, Premium Dog, Rubadub (treats)

New products: Brekkies Excel Tender & Delicious, Ultima Cat Sterilized & Ultima Dog Sterilized, Ultima Cat Shine & Beauty, Ultima Cat Senior, Ultima les Repas Equilibre, Brekkies Excel Cat Original

Websites: www.affinity-petcare.com

Affinity Petcare has been striving to produce novel, healthy products for pets for more than 40 years. Ranked number six in our annual list, the company offers a wide range of products, from special veterinary diets to super-premium foods to value-priced products for cats and dogs. 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.

Affinity products are distributed mainly in the European Union, but the company is building a distributor network within the fast-growing Eastern European petfood

4 Top Brazilian petfood manufacturers—like Nutriara Alimentos Ltda. and Total Alimentos SA—represent the fastest-growing companies in 2007.

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.

7. Uni-Charm Corp.

World headquarters: Tokyo, Japan

Approximate 2007 global retail sales: US\$0.31 billion

Officers: Toshio Takahara, chairman; Gumpei Futagami, president/CEO

Top brands: Aiken Genki, Neko Genki, Gaines

New products: Ginno Sara Kyono Gohobi (treats)

Website: www.unicharm.co.jp; www.uc-petcare.co.jp

Unicharm PetCare Corp. is a division of Tokyo-based conglomerate Uni-Charm Corp. and is continuing to take advantage of Japan's steadily growing pet population. Unicharm PetCare offers the Aiken Genki, Neko Genki and Gaines brands. These products aim to achieve an ideal nutritional balance for each pet in light of its age, physical attri-

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butes, physical condition and preferences, according to the company. To differentiate itself from other fast-growing Japanese petfood manufacturers, like Nisshin Petfood Inc., Unicharm emphasizes the speed of converting consumer needs into products and applying technology to premium foods.

The company must be doing something right, with US\$0.31 billion in sales in 2007 (Table 1, p. 23), despite not raking in a high number of SKUs in new petfood products. To continue a healthy growth, Unicharm faces challenges in improving product quality, safety consciousness and gaining profits in an environment where raw materials are increasingly expensive for everyone.

8. Nutriara Alimentos Ltda.

World headquarters: Arapongas, Paraná State, Brazil

Approximate 2007 global retail sales: US\$0.27 billion

Top brands: Foster, Freddy's, Bybos, Dog Show, Blog Dog, Dog Friends, Tommy, Full-dog, Floop, Dunga, Ringo, Pitoko Mix, Pitty, Bidu, Street Dog, Pitukão Pitukinha, Gatto, Pitukats, Mingau, Bancook, Show Dog

New products: Bancook Big, Bancook Niño, Show Dog Soft Bone, Show Dog Kid Bone, Show Dog Palititos

Website: www.nutriara.com.br

The first of our two returning petfood companies from Brazil, Nutriara Alimentos Ltda. was founded in 1991. Initially production was directed at birds, pigs, bovine and equine breeders—it wasn't until 1996 that the company opened the pet segment of its business. Nutriara expanded its activities and facilities, changed over its production lines and began focusing its investments solely on petfood. The company experienced radical growth this year, with a staggering 39.1% growth rate from 2006 to 2007 (Table 2, p. 24).

This year, Nutriara introduced two new dog treat brands: Bancook and Show Dog. With an almost overwhelming range of products for both cats and dogs—many of which are top sellers not only in Brazil but in other South American markets including Argentina, Uruguay, Paraguay and Chile—Nutriara continues to strive to offer pet products for animals of all ages, sizes and special health needs. According to company literature: "From the product's formulation to its arrival in the Brazilian consumer's homes, the Nutriara business structure creates jobs and brings quality of life to those who participate in the every day of the company—either directly or indirectly."

9. Total Alimentos SA

World headquarters: Três Corações, Brazil

Approximate 2007 global retail sales: US\$0.23 billion

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Officers: Antônio Teixeira Miranda Neto, president; Paulo Tavares, financial director; Anderson Duarte, technical director

Top brands: Família Max, Big Boss, Lider, K&S, Equilibrio, Naturalis, Natural treats

New products: Naturalis Dry Dog Food, Natural Chicken Breast Jerky Treats

Website: www.totalalimentos.com.br

Though its petfoods have only been available since 1995, Total ranked as the ninth largest petfood company in the world the past two years, having experienced year-to-year growth of 19% (Table 2, p. 24) in 2007. That growth has leveled off recently, but the company is still launching dozens of new products, expanding its global distribution and reaching new heights of quality and safety. To keep quality and service high, Total maintains a large sales force selling directly to 12,500 pet store and other retail accounts. As the company has expanded globally, it has opened sales branches in China, US and Europe.

Today, petfood comprises 70% of the company's sales. Besides being one of the largest petfood producers selling to the Brazil market, Total exports its cat and dog foods to 33 countries.

10. Nisshin Seifun Group

World headquarters: Tokyo, Japan

Approximate 2007 global retail sales: US\$0.20 billion

Officers: Osamu Shoda, chairman; Hiroshi Hasegawa, president

Top brands: Run, Carat, Lovely

Websites: www.nisshin.com

Nisshin Flour Milling Co. Ltd., which reorganized into the Japanese holding company Nisshin Seifun Group in 2001, owns subsidiary Nisshin Petfood Inc., which rounds out the top 10 companies for last year. The company has an integrated manufacturing, sales and

5 Dog food and pet health-care products were the fastest growing categories between 2003 and 2008.

research system that enables it to provide products that promise a new era in pet care, the Nisshin website attests.

Just this year Nisshin has already introduced 35 new cat food product SKUs (Table 3, p. 25). The lineup, which includes the dog food brand Run and cat food brand Carat, has found high acceptance among Japanese dog and cat owners. The Lovely brand has also been developed for small pets.

The company provides a pet advice and consultation service, website and various other forms of communication to continuously gather up-to-the-minute feedback from pet owners concerning their problems and needs. ●

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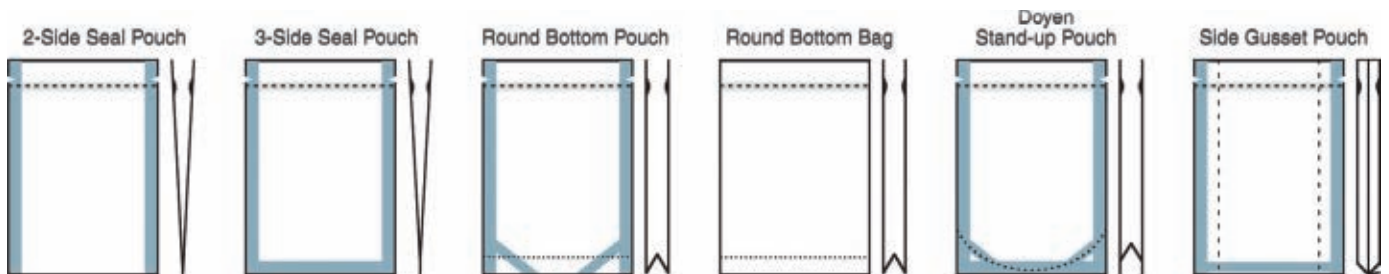
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Where are commodity prices heading?

Key indicators offer clues to future changes in petfood ingredient costs



BY DEBBIE PHILLIPS-DONALDSON

Oh, for a crystal ball ... Though businesses usually rely on financial data and expert analysis to predict how their costs might change, petfood professionals in charge of tracking raw material prices could be forgiven for wanting a magical device to help them see into the future.

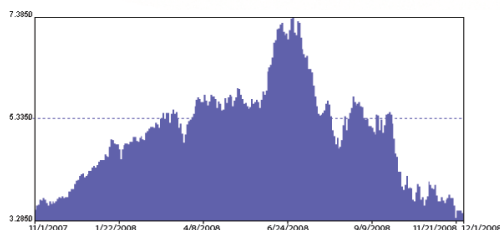
At this point a year ago, signs were starting to point to a rapid rise in the price of commodity ingredients common to petfood. Last summer saw a frightening spike, followed almost as quickly by a deep dive this past fall. For example, the price of a bushel of corn—at about US\$4 exactly a year ago—zoomed to a high of US\$7.38 in early July 2008, according to the Jacobsen Publishing Co. (see Figure 1). By October it had fallen to below US\$5, then all the way down to US\$3.79 at the time of this writing.

The fluctuation in prices is no surprise considering the current global economy. And not all commodity prices are declining; for example, poultry ingredient prices are still trending higher due to demand issues and uncertainty with key suppliers. The volatility is enough to keep any purchasing manager—not to mention supplier—guessing. “It reminds me of skiing,” says Gregg Griffin, sales manager of American Dehydrated Foods Inc. (ADF, www.adf.com). “We’re used to skiing on green slopes, and now we’ve come to a black slope and have no choice but to go down the black.”

Figure 1. The rise and fall of corn prices

From the beginning of November 2007 to the beginning of December 2008, the price of a bushel of corn spiked and then plummeted dramatically—from US\$7.38 at its peak in July to US\$3.79 as of December 22.

Source: The Jacobsen Publishing Co.



As energy goes ...

Besides the overall economy, Griffin and others tie commodity prices directly to energy costs, particularly the oil and natural gas that fuel several key cogs in the food and feed supply chain. Griffin cites examples such as transportation—shipping raw materials and finished products around the world by road, train, air and sea—and plant operations—keeping machines running to produce those materials and products. For instance, Griffin says ADF is a “huge consumer of natural gas to operate our spray dryers.”

Graphs and charts showing energy prices over the past year follow similar lines and curves as the ones for corn and other commodities. Case in point: Light crude oil, from which gasoline is made, closed at just over US\$42 a barrel at press time—more than US\$100 less per barrel than its peak in mid-July 2008.

Some people believe that if you take an even longer view, the link between energy and commodity prices can provide significant clues for the future. “When you chart the prices of grain and oil since 1970, you can clearly see that price spikes for both are aligned,” said Giovanni Gasperoni, executive VP of sales and marketing for Novus International Inc., in the July/August issue of *Feed International* (www.feedindustry.com).

Demand and speculation

Joel Newman, president and CEO of the American Feed Industry Association (AFIA, www.afia.org), agrees fuel prices have a definite impact on commodity prices, but he gives other reasons for the dramatic pricing changes over the past few years. “Because of the current global economy, demand has declined,” he says. Before the recession, global demand for food and feed ingredients had increased significantly.

Newman also cites financial speculation in crude oil and commodities, particularly the proliferation of specula-

tive index funds. In 2000, regulations were changed to allow exemptions of such index funds, leading to aggressive investment and soaring prices.

“Prior to those changes, the market allowed users to effectively hedge their positions, off-set by speculative positions, and the market converged as contracts moved to termination dates,” Newman



At its plant in Burgum, Netherlands, Sonac processes innovative petfood ingredients—such as hydrolyzed proteins—from the slaughter of animal protein and fat by-products.

explains. In other words, prices moved in conjunction with normal supply and demand.

One of AFIA's key activities, he says, is working with the US House of Representatives Committee on Agriculture to remove those exemptions. “We're also working to have all commodity trades regulated by the Commodity

Protein alternatives

BY STEFANIA PES

Though worldwide prices of key petfood ingredients such as corn and rice have declined in recent months, dramatic increases a year ago cascaded to the food and feed chain. Prices of animal proteins and fats remain high.

“Petfood players are facing unprecedented challenges highly connected to the raw material issue,” states Geert van der Velden, sales manager of Sonac, a leading European supplier of ingredients derived from slaughter by-products. It is part of the Ingredients division of the Vion Food Group, based in the Netherlands.

Petfood companies need flexible, reliable partners enabling them to fulfill customer requests such as finding alternative solutions, diversifying for competitive advantage, being more creative and looking for a “second generation of raw materials,” van der Velden adds.

This is especially true for materials that are not as available as before or have increased greatly in

price. For example, Kerapro is a newly developed product from feathers, with better quality, improved digestibility and bioavailability than feather meal, says Jarig Komrij, sales manager for dry petfood. It's also high in protein and low in ash content.

In Sonac's view, innovation includes picking up on trends and market opportunities, so the company is closely watching the hypoallergenic market. Although Sonac still has “exotic” protein sources such as lamb and duck meal in its portfolio, it's looking at what it considers the next and best solution: hydrolyzed proteins.

These proteins—also called peptides—are cut in small pieces so the body does not recognize them as proteins and the allergic reaction does not occur. “Then we look to functionality,” says van der Velden, citing examples such as plasma powder and gelatin based binders. “We are also focusing on gelatin hydrolyzates for joint problems, an alternative to products like chondroitin sulfate.”

Stefania Pes is a consultant and writer for Mediatric (www.mediatic.it), a communications agency serving the pet industry.

Online extra! More from Sonac at www.petfoodindustry.com/0901PETcommodity.aspx.

Futures Trading Commission,” he adds. Currently that commission, created by Congress in 1974 as an independent agency to regulate commodity futures and option markets in the US, does not have authority for over-the-counter and foreign exchange trades. (See <http://www.cftc.gov/index.htm>.)

No huge spikes?

No one is comfortable predicting specific commodity price changes this year, but it's a safe bet to watch energy. Currently the US government and most economists are expecting oil prices to stabilize and possibly increase slightly from their low levels at the end of 2008.

The annual average price is now projected to be US\$51 per barrel in 2009, says the Energy Information Administration (EIA), in charge of energy statistics for the US government (<http://www.eia.doe.gov/steo>). “The condition of the global economy and production decisions by the Organization of Petroleum Exporting Countries are expected to remain the crucial factors driving world

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A key indicator to watch is the global stock-to-use grain ratios.

oil prices,” says EIA. Falling demand now may create supply problems later.

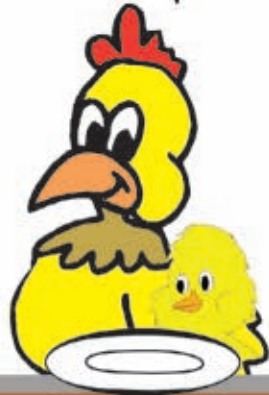
Newman agrees we will probably not see the huge spikes of 2008 in oil or grain prices, but grain will likely not drop all the way back down to its previous low, which was US\$2 to \$2.50 for a bushel of corn. He suggests another factor impacting commodity prices will be planting costs, which include seed, fertilizer, fuel for field work and transportation. “Currently planting costs are estimated to be about 25% more per acre than a year ago, which will require a higher floor level of pricing,” he says.

A key indicator to watch is the global stocks-to-use grain ratios: the amount of inventory at the end of the year relative to what is normally used annually. The ratio had dipped precariously in recent years and is still too low, Newman says, which tends to drive prices up. “It will take more than one good harvest year to improve global inventory levels.”

The fact that the 2008 US corn harvest ended up being the second highest ever will help, too, at least with that grain, according to the November issue of *Feed Management*.

While crystal balls may be in short supply, these clues may help you track pricing for key petfood ingredients. ●

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“We’re looking to get every piece of metal out that we can. We have zero tolerance,” says Jeff Bedrick of Channel Fish, explaining the importance of their Safeline PowerPhasePRO.

Stringent petfood, pet treat and feed safety standards are placing escalating demands on petfood producers for high levels of contaminant detection and inspection capability. “We are protecting our equipment, protecting our brand and, most importantly, protecting our customers’ brands,” explains Jeff Bedrick, IT manager at Channel Fish Co.

In the past, basic metal detectors met that need. Now X-ray detection is allowing for even more capability and sensitivity. If you can save time and energy while maintaining a secure, sterile processing line, not only are you on the right track as a business, but consumer confidence in your product will skyrocket—and who doesn’t want that?

Safety you can see

Thermo Scientific POWERx systems feature state-of-the-art X-ray design and image analysis software that optimizes sensitivity and probability of detection. A wide range of models for upright and horizontal package orientations are available, providing application flexibility from a single vendor with years of X-ray experience, according to the company. POWERx products are backed by Thermo Fisher Scientific’s global service organization. Comprehensive service capabilities include a standard remote access feature allowing certified Thermo technicians to connect offsite to your POWERx and optimize performance at any time.

According to Thermo Scientific, the advantages of X-ray inspection include:

- ▶ Easily complies with your customer inspection mandates and/or government regulations;
- ▶ Detects more than just metal—finds other dense foreign objects such as glass, stone and some plastics;
- ▶ Improves your detection sensitivity where metallic packaging—canned for wet foods—impacts the performance of metal detectors;
- ▶ Verifies assembly of your product (e.g., presence/absence, counting, breakage, placement), guaranteeing the highest level and a superior brand;

Playing it safe

Petfood manufacturing processes to keep your product’s integrity intact

BY JESSICA TAYLOR

- Uses mass measurement software (optional) to maintain ideal product weight; and
- Creates and saves detailed records for traceability and process improvement, including information-rich images of rejected products.

Case study: Channel Fish utilizes Safeline

Channel Fish Co. processes fish destined for major cat food canneries. Producing to the highest quality standards, Channel Fish relies on a PowerPhasePRO metal detector from Mettler-Toledo Safeline to ensure the safety of the fish product they process every day.

Compliance is key

Getting your plant certified in one or more safety programs is an important step in showing customers they can have complete assurance in your products. EtQ (www.etq.com) is enterprise quality and compliance management software for identifying, mitigating and preventing high-risk events through integration, automation and collaboration. The company uses best-in-class integrated modules and enterprise application integration to manage and measure quality and compliance processes and execute organizational change, says EtQ. Environmental Health & Safety (EHS) Management Software from EtQ is a flexible software package that guides companies through compliance with:

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- ISO 9000; and
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"We're looking to get every piece of metal out that we can. We have zero tolerance," noted Bedrick of Channel Fish. "We won't ship product that hasn't gone through the metal detector. If the metal detector goes down, we'll stop the line."

Before installing the new Safeline metal detector in May 2008, the metal

detector in use at Channel Fish was problematic, according to the company. Channel Fish had to rely almost entirely on the magnets at the end of the line to assure it was shipping metal-free product, and this system just didn't cut it.

"We judge how well the metal detector is working by what's on the magnets.



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‘We won’t ship product that hasn’t gone through the metal detector.’

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“This is the worst environment you can imagine for a metal detector,” Bedrick said. “Our product is wet and very salty. The room is humid and cold during operation, and humid and hot during the sanitation shift. We think moisture was one of the biggest problems we had with our old metal detector. Knowing the system can withstand our high pressure, hot water wash down is really important.

“We measure the success of the metal detector based on detection sensitivity and reliability,” concluded Bedrick. “We’re confident that we’re shipping metal-free product. And our maintenance guy hasn’t had to touch the Safeline metal detector since we installed it.”



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'No by-products' no more?

Some people within the Association of American Feed Control Officials (AAFCO) have never cared for negative claims on petfood labels—statements such as, “no _____” or “_____ free.” Although currently there is no model regulation, policy or guideline that explicitly addresses this issue, some regulators believe that even when such statements are technically true, claims regarding absence of an ingredient in a product may cause false disparagement of that safe and acceptable feed ingredient.

Personally, I do not care for negative claims, and for reasons apart from regulatory issues, I think in the long run they do a disservice to the petfood industry. Regardless, at this time most negative claims are generally tolerated by state feed control officials provided they are factual and do not elaborate on the purported rationale for absence of a particular ingredient.

One negative claim that has gained a lot of attention of late is “no by-products.” Over the past six months or so at least a few states have been seriously challenging such statements on a number of companies’ petfood labels. The basis for objection appears to be that the product label bearing the no by-products claim does in fact contain by-products, causing the claim to be false and misleading.

Not without controversy

AAFCO defines “by-products” pretty broadly: “Secondary products produced in addition to the principal product” (2008 AAFCO *Official Publication*, p. 240).

This could apply to many AAFCO-defined feed ingredients, yet only a fraction of those incorporate the term into their definitions. Starting about a decade ago, there was considerable

This negative claim is gaining attention from state regulators.

— David Dzanis



discussion between AAFCO and the industry regarding certain ingredients, particularly poultry by-product meal (AAFCO #9.10). The concern was that

Liver: meat or by-product?

One ingredient that some state regulators toss into the by-product category is liver. Admittedly, it is included among the examples of tissues in meat by-products (AAFCO #9.3), but in my opinion, that definition presumes it is commingled with the other non-meat tissues as a single ingredient. However, liver differs from most other examples in the definition in that it is often segregated from the by-product stream as a popular human food item. Thus, consumers don't seem to have the same negative connotation toward it as they do toward things like spleens, lungs and udders.

I was involved in a civil court case where the judge opined that liver is normally construed as meat by most consumers. So, it can be argued that the liver has at least the same inherent value as the meat itself and, when included in a petfood as a separate ingredient, it is not a secondary product as contemplated by AAFCO's definition of a by-product.

mandatory use of the term created a competitive disadvantage compared to ingredient names unencumbered by the negative insinuation that by-products has with the consumer. The proposed solution was to eliminate or replace it with a more consumer-friendly term—for example, poultry protein meal.

It is unfortunate that the by-product term creates such a negative perception with the public, as that certainly was not AAFCO's intent. I have long held that properly processed by-products can be perfectly safe and nutritious ingredients. Ideally, companies would help educate consumers about the merits of such ingredients rather than appear elusive—if not embarrassed—about their inclusion in formulations. In my opinion, an attempt to obfuscate the issue by further hiding the nature of an ingredient from the public is not the correct tack.

Whatever one's position on this controversy, no company should take unfair advantage of the situation—claim no by-products when such is not the fact. For many years, the predominant means of validating the veracity of a no by-products claim appeared to be simply to verify the absence of the term in the ingredient declaration. However, at least for some states, that is no longer sufficient. To these regulators, the presence or absence of the term doesn't wholly determine the presence or absence of by-products in the petfood.

Growing interpretation

A growing point of view among regulators is that any rendered meal is, in fact, a by-product. Certainly, it is apparent from AAFCO definitions that an ingredient like meat meal (AAFCO #9.40) likely contains internal organs and other non-meat tissues normally understood to be by-products. On that basis, states question whether it is false and misleading to then implicitly assert that the ingredient is not a by-product when it is similar in composition to something like poultry by-product meal.

In fact, the states contend that poultry meal (AAFCO #9.71), which is comprised solely of flesh, skin and bones (lacks the non-meat tissues normally ascribed to by-products), is still a by-product, since it generally meets the AAFCO definition as a product result-

It is unfortunate that the by-product term creates such a negative perception with the public.

ing secondarily from the processing of poultry for human consumption.

As I understand it, rendered animal fats would also fall under the definition of by-products as the states are interpreting it. While perfectly acceptable ingredients for petfood formulations, these fats would likely not exist on the market except for the fact they are an offshoot of the meat and poultry processing industry.

While the focus has been on animal-source ingredients, it's likely that many plant-source ingredients, such as grain

fractions (oat hulls, wheat middlings), beet pulp and tomato pomace would also fall under this broad definition. (See "Ingredient Issues," p. 42.) Hence, attempts to qualify the claim—for example, no meat by-products—would likely still be considered misleading by state regulators.

What this means

While only a few states appear to be making this a priority now, I think it is likely to gain sympathy with regulators, and other states may join in. Though the basis for action would be a relatively straightforward case of a false or misleading claim, I would expect the action would reflect an underlying belief that it would also help hinder false disparagement of AAFCO-defined by-products in general. States may also view it as leveling the playing field, diminishing the competitive disadvantage of declaring by-product as part of an AAFCO-defined ingredient name.

Ultimately, companies might not have a choice in the matter. I understand and appreciate the consumer appeal of a no by-products claim from a marketing perspective, but from the scientific viewpoint, it has no real meaning in terms of assuring a safe and nutritious petfood.

So, regardless of state action, I would advise that this negative claim be given a positive spin. For example, instead of no by-products, claims such as, "lamb meal as the only animal-source protein ingredient" or "just chicken and chicken liver" can be used to describe the product. ●

Dr. Dzanis is a writer and independent consultant on veterinary nutrition, labeling and regulation. He can be reached at Tel: +1.661.251.3543, Fax: +1.661.251.3203, E-mail: dzanis@aol.com.

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Cheap filler or nutritious fiber?

Wheat bran and middlings are two closely related by-products from wheat flour milling that have traditionally been considered laxatives for people or feed for livestock. Use of wheat bran and middlings in petfood emerged from positive performance in feed applications and their relatively low cost when teamed with commodity ingredients like meat and bone meal, corn and soybean meal in economy or value brands.

Because of these humble origins, many would prefer to cast wheat milling by-products aside. Wheat bran and middlings can still be found in numerous petfoods today. They remain an economical ingredient. But as biomedical research teaches us more about these “branny coats” of wheat, the negative connotation of “cheap filler” may be undeserved and may overlook their nutritional benefits.

Where they originate

To gain some appreciation for these ingredients, a quick overview is helpful. In the process of milling wheat to flour, wheat kernels are cleaned, blended, conditioned (water added), then repeatedly ground and sifted to extract the starchy endosperm from the outer layers. Flour of the desired grade is collected at each step, leaving the “tail of the mill” fractions—bran, germ and the aleurone, along with wheat screenings and flour not making the grade.

These milling by-products go by numerous collective names. Wheat bran is defined as “the coarse outer covering of the wheat kernel as separated from cleaned and scoured wheat”

Negative perceptions about wheat bran and middlings may be undeserved.

— Greg Aldrich



(AAFCO, 2008). Names for wheat bran plus increasing levels of those tail of the mill fractions include wheat mill run, wheat middlings, wheat shorts and wheat red dog.

Depending on the flour mill, the by-product fractions may be kept separate or collected into a single bin and merchandised as wheat middlings. In the big picture, wheat bran and middlings differ only in the dilution of fiber from bran with starch from the tail of the mill fraction. Regardless of name, these milling by-products:

- ▶ Make up some 25% to 30% of the initial grain;
- ▶ Have slightly higher protein than the

- starting grain; and
- ▶ Contain more than double the amount of oils, fiber and minerals.

Irony in the mill

So, in an ironic twist, these nutritionally valuable components (among many others) are concentrated in the milling by-products rather than in the more prized flour that drives their production. However, many folks consider wheat bran and middlings as fillers or cheap by-products.

While their scorn may have a thread of truth because the ingredients are relatively inexpensive and helpful in filling formulation gaps, it shouldn't diminish their value to the formulation. That is because wheat bran and middlings carry a higher protein content than other grains without the ash penalty of many protein meals, and the bran serves as a functional fiber (approximately 50% of total dietary fiber) to promote gastrointestinal health. Thus, judicious use can be quite effective.

Wheat bran and middlings fit well in dry extruded petfoods, especially wheat middlings because of their higher starch content. Wheat by-products also do well in palatability tests compared with other grains. Wheat middlings have been a perennial favorite in semi-moist foods and treats and in “ration” style wet pet-

Wheat bran and middlings carry a higher protein content than other grains.

foods to aid in moisture management and texture.

Research shows benefits

In dogs, wheat bran has been proven comparable in digestibility, fecal output and defecation frequency to other fiber sources such as beet pulp and tomato pomace (Fahey *et al.*, 1990). Wheat middlings have also yielded comparable short chain fatty acid levels to that of beet pulp, soy fiber and pea fiber in *in vitro* fermentation models using canine fecal inoculum (Bosch *et al.*, 2008).

These positive levels may be partially due to the relatively rich content of fructooligosaccharides in wheat bran and wheat middlings (4.0 and 5.07 mg/g, respectively) compared to other fiber sources such as beet pulp, rice bran and soybean hulls (0.05, 0.14 and 0.12 mg/g, respectively; Hussein *et al.*, 1998). Further, wheat bran

turing those premium diets.

However, research in swine suggests the lower digestibility of wheat middlings compared to grains was primarily attributable to the fiber components rather than the protein or starch (Lin *et al.*, 1987). So, wheat bran and middlings are probably a reasonable alternative for other fibers but not a direct replacement for grains if diet digestibility and stool consistency are the drivers. Yet the higher fiber content and diminished digestibility of wheat bran and middlings could be an effective tool for lowering caloric density of a “lite” petfood.

When to avoid

Wheat bran and middlings should probably be avoided in dogs or cats with wheat protein hypersensitivities. Further, ingredients derived from wheat (and other small grains) susceptible to *fusarium* molds should be closely monitored for the mycotoxin deoxynivalenol (DON, also known as vomitoxin). At

elevated levels in the diet (approaching 15% to 20%), attention to mineral fortification (such as phosphorus, copper and zinc) is critical to overcome any reduction associated with phytate (Collings *et al.*, 1979) and soluble fiber content (Bergman *et al.*, 1997).

Because wheat flour quality, not the milling by-products, drives the flour milling operation, the nutrient composition of wheat bran and middlings can vary a great deal (Cromwell *et al.*, 2000). The variation must be monitored closely with an eye toward leveling the highs and lows. But if used properly, wheat bran and middlings can be a nutritious and healthy component of companion animal diets. ●

Dr. Greg Aldrich is president of Pet Food & Ingredient Technology, Inc., which facilitates innovations in foods and ingredients for companion animals.

The nutrient composition of wheat bran and wheat middlings can vary a great deal.

contains a number of beneficial phytochemicals (Ferguson *et al.*, 1999) that have been linked to markers for reduced colon cancer tumorigenesis (Qu *et al.*, 2005).

The challenge is that when wheat middlings are used like a grain (13.2% of the diet) in an economy corn, soy, meat and bone meal diet versus a premium poultry by-product meal and rice diet, the overall digestibility is lower while stool volume is higher (Swanson *et al.*, 2004). This is a difference promoted by petfood companies manufac-

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Research Notes

Fermentation of canine fiber sources

The study aimed to evaluate the variation in fermentation activity along the distal canine gastrointestinal tract (GIT) and assess fermentation kinetics and end product profiles of 16 dietary fibers for dog foods using canine fecal inoculums. Among substrates, large variations in fermentation kinetics and end product profiles were noted.

Sugar beet pectin, fructans and guar gums were rapidly fermentable, indicated by a greater maximal rate of gas production (Rmax) compared with all other substrates ($P < 0.05$), whereas peanut hulls and wheat fiber were poorly fermentable, indicated by the least amount of gas produced ($P < 0.05$). Sugar beet fiber, sugar beet pulp, soy fiber and wheat middlings were moderately fermentable with a low Rmax. Citrus pectin and pea fiber showed a similar low Rmax, but the time at which this occurred was later compared with sugar beet fiber, sugar beet pulp, soy fiber and wheat middlings ($P < 0.05$).

Results of this study can be used to formulate canine diets that stimulate dietary fiber fermentation along the distal GIT that may optimize GIT

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Key Concepts

► Fermentation of canine fiber sources

(*J. Anim Sci.* 86:2979-2989, doi:10.2527/jas.2007-0819) Results of this study can be used to formulate canine diets that stimulate dietary fiber fermentation that may optimize gut health and stimulate the level of satiety.

► Age-related changes in nutrient usage

(*Annu Rev Nutr.* 28:425-45) Genomic biology offers promise to help elucidate in greater detail how nutrient usage is affected by age of the dog and cat.

health and stimulate the level of satiety in dogs.

Source: G. Bosch, *et al.*, 2008. Comparative *in vitro* fermentation activity in the canine distal gastrointestinal tract and fermentation kinetics of fiber sources. *J. Anim Sci.* 86:2979-2989, doi:10.2527/jas.2007-0819.

Age-related changes in nutrient usage

As companion animals age and pass through various lifestages from *in utero* to the geriatric state, nutrient requirements change along with how nutrients are used by the various organ systems in the body. From the regulatory perspective, recognized lifestages include maintenance, growth and gestation/lactation. Other important lifestages include *in utero*, neonate and senior/geriatric.

Age affects digestive physiological properties, too, and factors such as gut microbiota, digestive hormones, gut morphology, gut immunity and nutrient digestibility are modified as the animal becomes older. Each of the nutrients is affected in some manner by age, some more than others. Genomic biology offers promise to help elucidate in greater detail how nutrient usage is affected by age of the dog and cat.

Source: G.C. Fahey Jr., *et al.*, 2008. Age-related changes in nutrient utilization by companion animals. *Annu Rev Nutr.* 28:425-45



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Petfood Specialties offers technical services and support for the petfood industry. According to the company, its services are dedicated to petfood producers and deliver complete factory and production line projects. The company also offers outsourcing support for factories in areas such as marketing, nutrition, recipes, raw materials, equipment, production, product testing and other key functions.



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Feed forming machine

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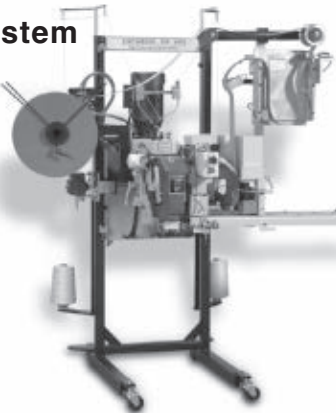
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US sales still growing

This year is starting off on a sour note, as the recession takes its toll around the world. Every day brings new headlines about companies cutting jobs or more people losing their homes. What does this mean for petfood? While finding up-to-the-minute data is difficult, one source shows that at least in the US, dog and cat food sales are still growing.

According to Information Resources Inc.'s Infoscans Reviews, US dog food sales increased 11.6% overall in the

The good news is that most pet owners are feeding their dogs and cats well.

— Debbie Phillips-Donaldson



six months ending November 30, 2008 (Table 1). US cat food enjoyed a 12.3% gain overall in the same period.

Not all product segments grew at the same rate, and some not at all. With dog food, for example, dry grew at a robust 15.2%. But wet increased only 2.4%.

Nearly every segment within cat food increased in sales, with dry the biggest winner (16.2%). Wet also saw a gain, at 8.7%, and the raw/frozen segment grew more than 2,000% (though at very small numbers).

As you look at changes in volume, you could conclude that much of the sales gains probably came from price increases and sales of higher-priced products. The growth in dog food volume for the same six months was only 4.5%, less than half of the sales increase. For cat food, volume growth at 9.2% was closer to the sales growth percentage.

What's most encouraging is that the month-to-month data between June and November 2008 show that growth held steady or became even stronger toward the end of the year, at the same time the US economy was getting much worse.

We can't ignore that millions of consumers globally are suffering; and we're hearing more reports of pets being turned in at US animal shelters. The good news is that most pet owners are still feeding their dogs and cats well. ●

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

Table 1. Changes in US sales, last half of 2008

From June through end of November 2008, cat and dog food sales (in US\$ and volume) in supermarkets, drugstores and mass merchandise outlets (except Wal-Mart) increased overall and in most categories.

Source: Infoscans Reviews, Information Resources Inc.

	US\$ millions			Volume (millions of pounds)		
	06/15/08	11/30/08	% change	06/15/08	11/30/08	% change
Dog food total	\$250.9	\$280.0	11.6%	282.9	295.7	4.5%
Dog biscuits/treats	\$52.2	\$58.7	8.6%	16.6	17.3	4.2%
Dry dog food	\$143.2	\$165.0	15.2%	220.3	233.2	5.9%
Semi-moist dog food	\$3.5	\$3.7	5.7%	3.3	3.2	-3.0%
Wet dog food	\$49.9	\$51.1	2.4%	42	41.5	-1.2%
Frozen/raw dog food	\$2.1	\$1.5	-28.6%	0.64	0.45	-29.7%
Cat food total	\$170.6	\$191.6	12.3%	125.7	137.3	9.2%
Cat treats	\$11.6	\$12.6	8.6%	1.3	1.4	7.7%
Dry cat food	\$82.9	\$96.3	16.2%	82.8	92.3	11.5%
Semi-moist cat food	\$39.8	\$40.0	0.5%	0.5	0.48	-2.0%
Wet cat food	\$76.1	\$82.7	8.7%	41.5	43.6	5.1%
Frozen/raw cat food	\$0.001	\$0.020	2122.2%	0.000	0.005	2400.0%



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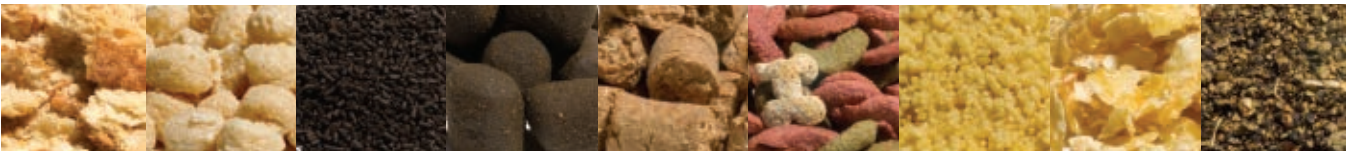
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