

July 2009

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2009

Reference and Buyer's Guide

**Mid-year
market update**

**Import and
export trends**

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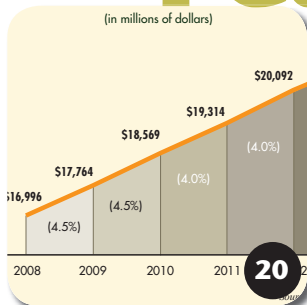
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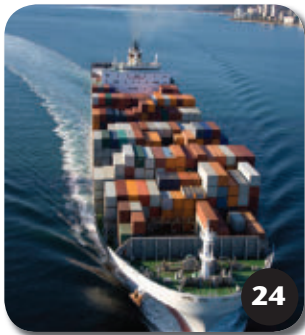
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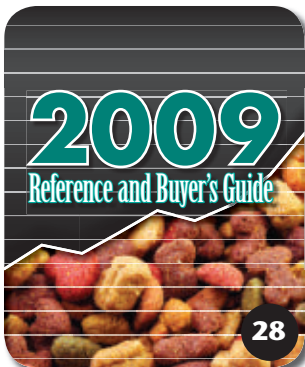
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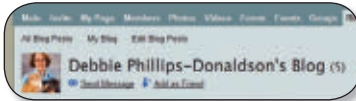


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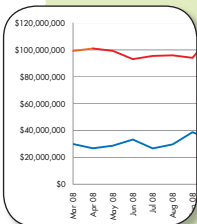
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Pet retailers fight off recession

Though the economy was starting to show signs of softening a year ago, hardly anyone foresaw the huge crash coming in the fall. Now everyone is wondering if we're starting to recover from what we now know is a recession that began even earlier. More importantly for our industry: Will the pet market be able to stay above the fray?

Signs from the pet retail channel say yes. Though not many US pet specialty retailers enjoyed increases in sales volume in 2008 as they did in 2007, 42% of respondents to *Pet Product News International's* annual *State of the Industry* survey said their stores had increased sales last year, while 19% said their volume remained the same and 28% saw decreases (http://www.petproductnews.com/buyers_guide/pet-industry-directory-buying-guide.aspx).

Food gains US retail share

Even more encouraging for petfood, the survey showed dog food accounted for 29.7% of the 2008 average US store sales in dog products—worth US\$183,000—an increase of 3.7% over 2007. (Dog products overall comprised 52.2% of the total US pet retail market in 2008.) Snacks/treats'

Their success means only good news for petfood and its continued growth.

— Debbie Phillips-Donaldson



share of the dog product total was 8.4%, a slight decrease (-1.4%) from 2007.

Cat food jumped to 43.8% of the cat product category, which averaged US\$34,700 per US retailer in 2008; food's share of cat products in 2007 was 35%. Snacks/treats accounted for 5.5% of the category, up slightly from 5% in 2007.

Superstores up, too

The survey's 380 respondents represent the 6,100 independent pet store owners and managers in the US who read *Pet Product News*.

What about the pet superstore chains? PetSmart reported a net sales increase of 9.5%, to US\$1.3 billion, in the first quarter of this year compared with the same period last year. Store sales grew 3.9% in the first quarter, and the company's stock was up 21%, according to *BusinessWeek*.

In a May article (http://www.businessweek.com/investor/content/may2009/pi20090521_054370.htm), the magazine quoted Deutsche Bank analyst Mike Baker, who cited one of PetSmart's advantages during a tough economy: the "need-based nature of petfood," which comprises more than half of the chain's business.

Europe also rises

Success in rising above the recession has not been limited to US pet retailers. The Germany-based Fressnapf chain,

with more than 900 stores throughout Western Europe, increased sales 11.3% in the first quarter of 2009, with same-store sales growing 3.6%, according to www.pet-global.com.

In the United Kingdom, pet supplies chain Pets at Home reported a 14% sales increase for fiscal year 2008-2009 (ending March 26), to US\$669 million (£404 million). Same-store sales rose 7.5% from the previous year, according to www.pet-global.com. The company attributed its gains partially to success with its private label products, including petfood lines. Pets at Home introduced 208 new products in the past year and opened 19 new stores, for a total of 232 outlets.

Less developed markets for petfood, such as Eastern Europe, Asia-Pacific and Latin America, are also enjoying some success despite the downturn. Avex Baumarkt, a German "do-it-yourself" and gardening retail chain that also stocks pet supplies, recently opened its first Czech store in Valmez, in the southeast part of the country, says www.pet-global.com.

All this is only good news for petfood and its continued growth. ●

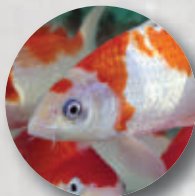
Phillips-Donaldson is editor-in-chief of Petfood Industry magazine. E-mail her at dphillips@wattnet.net.

Online resource

The *State of the Industry* report is part of *Pet Product News International's* annual *Pet Industry Directory & Buying Guide*, available to subscribers or for purchase. Some directory listings are available for free at http://www.petproductnews.com/buyers_guide/2010-annual-products/2010-annual-products.aspx.

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Industry News

Quick hits

- ▶ *Petfood Industry* is pleased to announce the appointment of Karen Blandford-Anderson as sales manager for print, digital, event and sponsor sales.
- ▶ Petfood manufacturer Fish4Dogs was a finalist in the export achievement category of the Garden Industry Manufacturers Association awards.
- ▶ Intervet/Schering-Plough Animal Health has appointed Jennie Hodgen as technical service specialist in meat science and Bob Giblin as manager of food industry communications.

Petfood Forum 2010 and Petfood Forum Asia call for papers



The Petfood Forum 2010 organizing committee invites the submission of abstracts for non-commercial oral and poster

presentations on the following topics:

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

Petfood Forum 2010 is scheduled for April 12-14, 2010. Please submit your abstract by e-mail, formatted for Microsoft Word, to dphillips@wattnet.net. Abstracts must be received no later than September 15, 2009.

The Petfood Forum Asia 2010 orga-

nizing committee also invites submission of abstracts for noncommercial oral presentations in the following topic areas:

- ▶ Trends in Asia-Pacific petfood markets;
- ▶ Packaging updates;
- ▶ Food safety issues;
- ▶ Processing and production subjects;
- ▶ Global regulatory changes;
- ▶ Nutrition and ingredients;
- ▶ Controlling mycotoxins and other contaminants;
- ▶ Pet retailing trends in the Asia-Pacific region.

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Asia 2010. Abstracts are due August 15, 2009; please submit to dphillips@wattnet.net.

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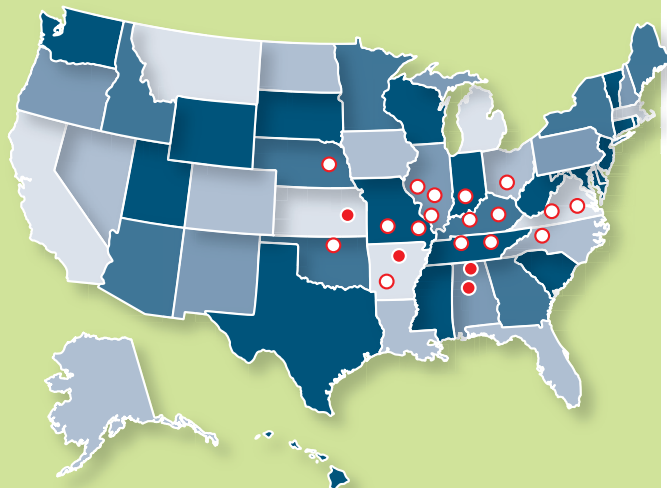
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Mycotoxin Hotspots in the US

Throughout the growing season Neogen produces maps on mycotoxin development. This map is as of June 18. Maps are continually being updated as more information becomes available.



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Australia suspends irradiation of cat food. An outbreak in neurological disorders in cats has led Australia to cease sterilization of cat food by irradiation. Scientific studies have suggested food irradiation as the source of the illnesses afflicting cats, but exactly how irradiation is causing food to be toxic to cats is unknown.

Ninety cats in Australia were afflicted with neurological disorders after they ate Orijen imported dry cat food, manufactured by Champion Petfoods, according to Dr. Georgina Child, a neurologist familiar with the cases.

Only Australia, which requires irradiation of pet food, has reported issues with Orijen cat food; all other countries who imported non-irradiated Orijen cat food reported no problems.



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On the Web

PetSmart gets product ideas from consumers

Edison Nation, which works with manufacturers and retailers to find and deploy product innovations, is now taking submissions for pet products from everyday people on behalf of PetSmart Inc., according to an Edison Nation press release.

Now through July 9 on Edison Nation's website, anyone with an innovative idea for interactive pet toys and products can submit to PetSmart's "Live Product Search" query.

"We specifically hope to discover interactive pet toys and products that help keep house pets of all ages, shapes and sizes entertained by their pet parents or while they are temporarily away," said Bruce Richardson, PetSmart spokesman. "There's a huge demand for products that will keep pets happy, occupied and distracted from possibly more destructive behavior."

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INDUSTRY CALENDAR

A complete listing of 2009 events is available at www.PetfoodIndustry.com

July

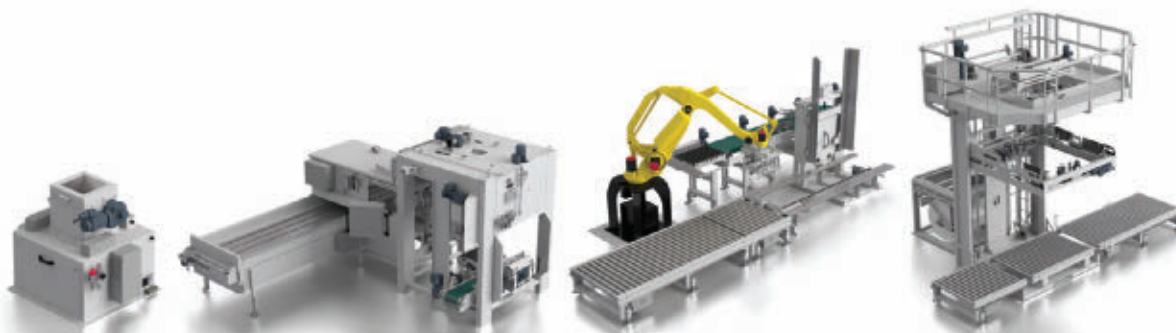
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AVMA/AAAP Annual Convention, July 11-15, 2009, Seattle, Washington, USA. Contact: AVMA, 1931 N. Meacham Road, Suite 100, Schaumburg, Illinois 60173 USA, Tel: +1.847.925.8070, Fax: +1.847.925.1329, avmainfo@avma.org, www.avma.org.

August

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2009 Association of American Feed Control Officials (AAFCO) Annual Meeting, July 30 – August 6, Hyatt Regency, Washington, D.C., USA, Tel: +1.202.737.1234, www.aafco.org.



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« Sweet potato chews

P&E Innovations' PieceofLove offers sliced dog treats made of cooked, dried sweet potato and a natural coating of flavor. The treats are designed for dogs' dental and oral health and are a source of vitamin A, dietary fiber, potassium, phosphorus, magnesium and calcium, according to the company. www.pieceoflove.com

Frozen dog, cat food »

CountryPet Naturals from Canz Naturals offers dog and cat food packaged in frozen rolls. The cat food comes in a Fish & Chicken recipe, and the dog food comes in several varieties, including Lamb & Vegetable. All varieties are grain free, contain no fillers and are pasteurized, according to the company. www.countrypetnaturals.com



« Chicken and veggie strips

Plato Pet Treats designed its Chicken & Vegetable strips to aid in dogs' gastrointestinal tract health. Peas, carrots, tomatoes, sweet potatoes, parsley and US-grown chicken are included in the treats, which are also coated with probiotics. The treats have no artificial colors, flavors, synthetic preservatives or GMOs, according to the company. www.platopettreats.com

Dehydrated vegetable supplement »

Synergy Dehydrated Vegetable Mix from Canine Caviar contains no dyes, preservatives or chemicals, according to the company. The mix can be blended with frozen protein or canned foods. Ingredients include peas, carrots, pumpkin and red pepper. www.caninecaviar.com

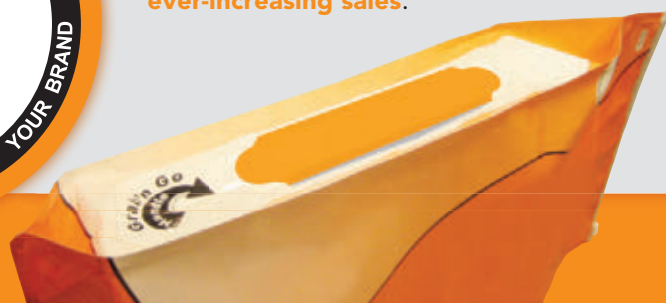


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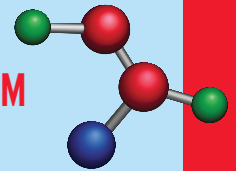


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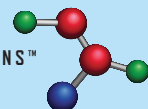
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Business is barking: a mid-year market update

Packaged Facts predicts what will keep the momentum going for petfood while the global economy keeps taking a bite out of consumers

BY JESSICA TAYLOR

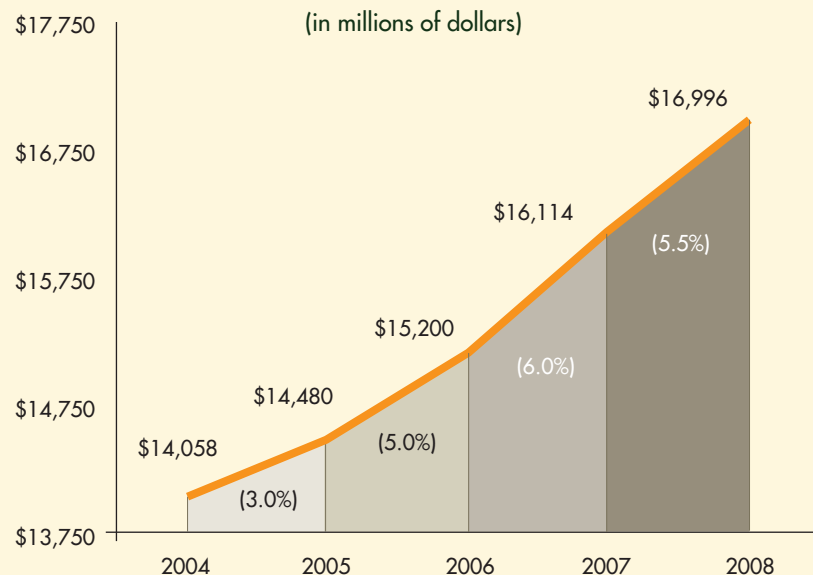
The US pet market continues to remain resilient despite the uncertainty stemming from the global economic collapse that began to make headlines in October 2008. American consumers are monitoring their spending more closely than they have in recent years, yet petfood sales are holding relatively steady.

Partly cloudy

Packaged Facts, in a recent report, *US Pet Market Outlook 2009-2010: Surviving and Thriving in Challenging Economic Times*, views it as a given that consumers across virtually all industries will demand greater value in the products they buy, exploring less expensive options including private labels and self-care approaches and consolidating shopping trips to save gas. Some manu-

Figure 1: U.S. retail sales of petfood, 2004-2008

According to Packaged Facts data, petfood sales have continued to rise over the past five years, despite the 2007 recall and rising ingredient costs.



Source: Packaged Facts

facturers and retailers may also start to feel the pinch—Central Garden & Pet reported a 7% decline in net sales during the first fiscal quarter of 2009 (ended December 27, 2008), for example. Other economic indicators—job losses, the financial/credit crisis, the housing market and high levels of personal debt—are all major components driving petfood consumer’s purchasing behavior.

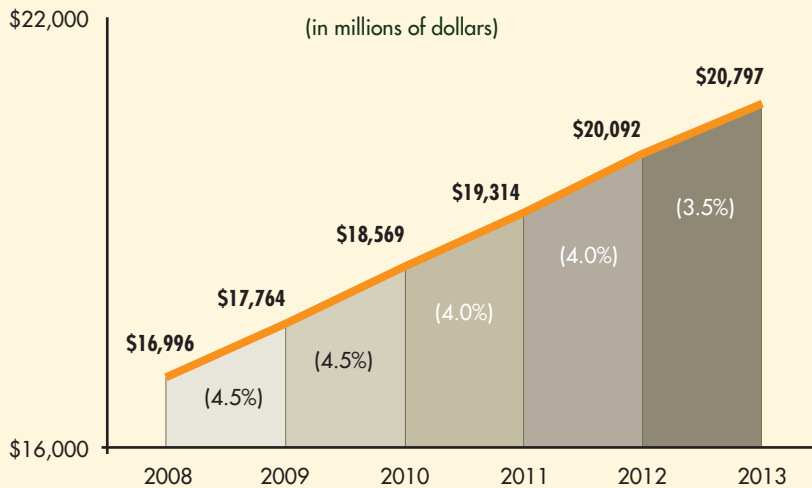
According to the same report, total US retail sales are projected to decrease 0.5% in 2009. Although it will be the first decline for the industry in three decades, it’s a minuscule plunge compared with other spiraling markets.

Weathering the storm

Two key factors are keeping the pet market afloat—pet humanization

Figure 2: Projected U.S. retail sales of petood, 2008-2013

Packaged Facts predicts, despite the recent worldwide economic downturn, that petfood sales will continue to grow steadily in the next five years.



Source: Packaged Facts

A chance of sunshine

So if consumer confidence is at an all-time low, why this relative recession resistance for the pet market? According to Packaged Facts data:

- ▶ Total US retail sales rose 1.4% in 2008;
- ▶ PetSmart posts 8.4% sales increase in fiscal year 2008;
- ▶ Del Monte net pet product sales grows 15.1% in third quarter of fiscal 2009 (ending May 3);
- ▶ Hill’s revenue increases 13.5% in fourth quarter of calendar 2008;
- ▶ VCA Antech posts 6.7% revenue growth in 2008; and
- ▶ PetMed Express reports 16% increase in net sales in 2008.

and premium demographics, says Packaged Facts. Premium demographics account for over half of all pet market spending. The growing clout of this group matters not just because it shows that marketers fielding higher priced, upscale and luxury fare are handily hitting their demographic mark, but also because higher-income consumers are in a better position to weather the economic downturn. In many cases, these more affluent consumers are also the same better-educated consumers most likely to read labels and pay attention to health claims and to, therefore, appreciate why many higher-priced products and

Figure 3: Value equation: short-term

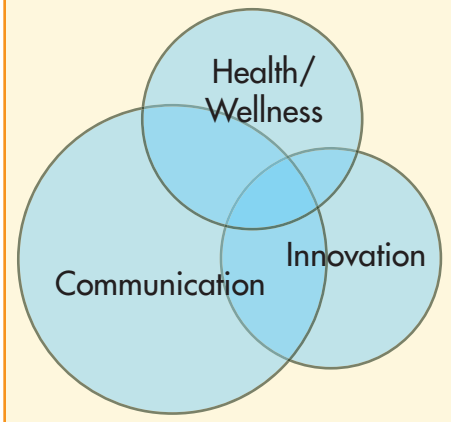


Figure 4: Value equation: medium-term

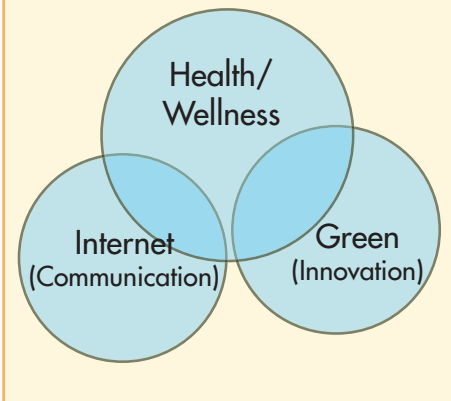
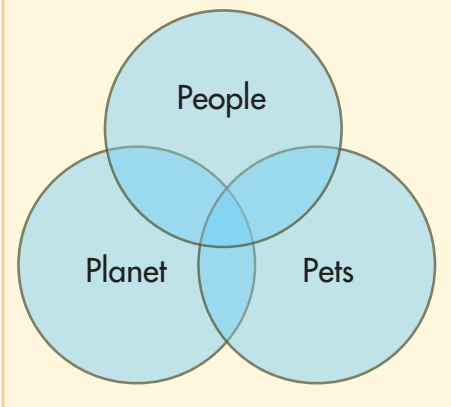


Figure 5: Value equation: long-term



Packaged Facts predicts the value-equation for the market in the short-, medium- and long-term.

services are worth the extra dollars in terms of potential pet health dividends.

Fueled by these factors, the US pet market is enjoying a momentum not likely to cease anytime soon, although Packaged Facts believes that the down economy will temper annual sales gains during the next one to two years.

Compared to most established consumer packaged goods markets, the pet market's 6-7% rate of growth during the past five years is well above average. This momentum is largely a function of demand for better quality products.

Storm chasers

Challenges and new opportunities both will remain the two most important things to tackle during the rest of 2009. Manufacturers need to consider balancing issues like downward pricing pressure from

consumers and price increases from ingredient suppliers.

One of the best ways to track just what consumers want from



Online extra!

To dig a little bit deeper in to what's in store for the petfood market, check out www.petfoodindustry.com/marketupdate.aspx for more from Packaged Facts.

How to market in 2009

Recent marketing trends in the industry point to more transparency, clearer labels and some good ol' fashioned glitz and glamour:

- ▶ **Celebrity marketing**—From TV personalities to English race horses, a recognizable name and a recognizable face translate well for bringing instant attention to your product;
- ▶ **Cause-related marketing**—While engendering goodwill for your product, the green-friendly approach is cost effective as well;
- ▶ **Professional endorsement**—Using claims such as “developed with veterinarians” is something consumers are scanning labels for.

you is the Internet. Since the 2007 recalls, the Internet is viewed much like an educational venue to many pet parents. Mobile websites offer activities and information in the form of online advertising/promo approaches, podcasts, cell phones, nontraditional media/branded projects and online communities and blogs. Utilize them. Your customers sure are. ●

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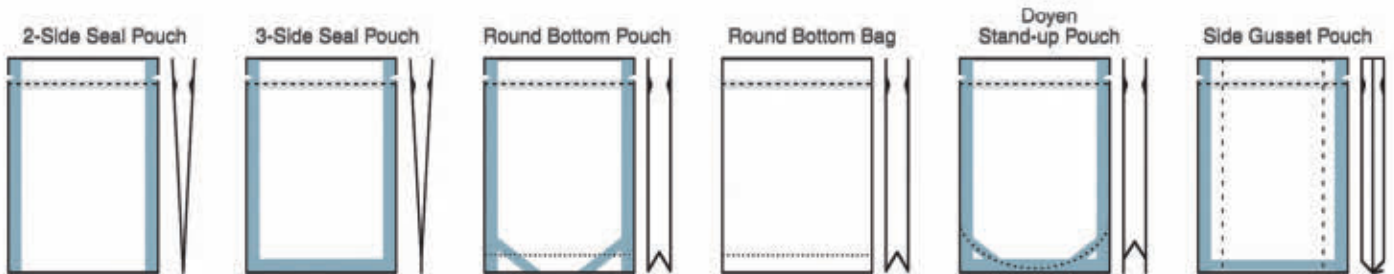
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Import and export trends

US trade data
show petfood faring
relatively well

BY PAUL RASMUSSEN

US Customs and Border
Protection collects information
on every waterborne shipment
entering the country.

First quarter petfood results

The petfood industry has fared well compared with other industries in the first quarter of 2009, showing an 18.8% increase in the total value of imports and a slight 2.7% decrease in exports. This outpaced the overall US trade economy, which saw sharp declines for both imports and exports—22.3% and 29.9%, respectively.

The top sources for imports of petfood products have not changed significantly in the last year, as the

March data shows no difference in the top five sources from 2008 (China, Canada, Thailand, Australia and Brazil). Export destinations for March saw big increases over the previous March for both Japan and Belgium (Figure 2).

Pricing analysis of vessel imports and exports saw an increase in the cost of imports from China from January to date in 2009 compared with 2008. Costs under HTS code 2309100010 (cat and dog food products in airtight containers) rose

As the petfood industry becomes increasingly international, companies and their managers must break through market complexity by choosing reliable, unbiased sources of information. Increased competition from both foreign competitors and boutique brands requires actionable intelligence to make quicker and more timely strategic decisions.

One method of analysis that progressive petfood manufacturers and brand holders are incorporating is the use of trade data. This information, while not new to some companies, is creating value across marketing, sourcing, sales and legal departments.

What is trade data?

Trade data provides information on the movement of physical goods (raw materials and finished products) from one country to another, including exports and imports. This information can come in the form of:

- ▶ High-level statistical data outlining total trade volumes between countries or for a given commodity code, known as a harmonized tariff schedule code (HTS); or
- ▶ Very detailed shipment reports outlining actual companies and products at a bill of lading/manifest level.

Generally, all this information is collected by government sources but is typically disseminated by private companies that work with government agencies.

1.7%, from US\$6.42 per kilogram to US\$6.53 per kilogram. Costs for HTS code 2309100090 (cat and dog food products in other containers) increased 15.9%, from US\$5.03 per kilogram to US\$5.83 per kilogram.

The prices per kilogram of US exports to the rest of the world have increased 9.2% during the same period. These numbers show the strength of the petfood industry. While not recession-proof, it does appear recession resistant.

US data: high-level stats

The most referenced form of trade data is the information gathered by the US Census Bureau. This data consists of the total imports and exports for the US using the harmonized system. Census data is provided at a high level, with dollar value typically being the unit of measure. This data is comprehensive, covering all imports and exports.

The lowest level of information available within US Census data is at a harmonized product level. For example, a user could see the total value of all dog and cat food in general (HTS code 230910) imported and exported in 2008 (Figure 1). You could also examine which countries export the most dog and cat food in airtight containers (HTS code 2309100010) to the US and which countries receive the most exports from the US (Figure 2). Often, this data is referenced when discussing the trade deficit.

Detailed shipments

For companies looking for detailed information, US Customs and Border Protection collects information on every shipment entering the US at a bill of lading level using the automated manifest system. US Customs data, as it is commonly known, is the most detailed source of information that international trade professionals can access.

While the detail on this information is great, there is no significant standardization of how companies document product and commodity names. In addition, US Customs provides only waterborne imports electronically,

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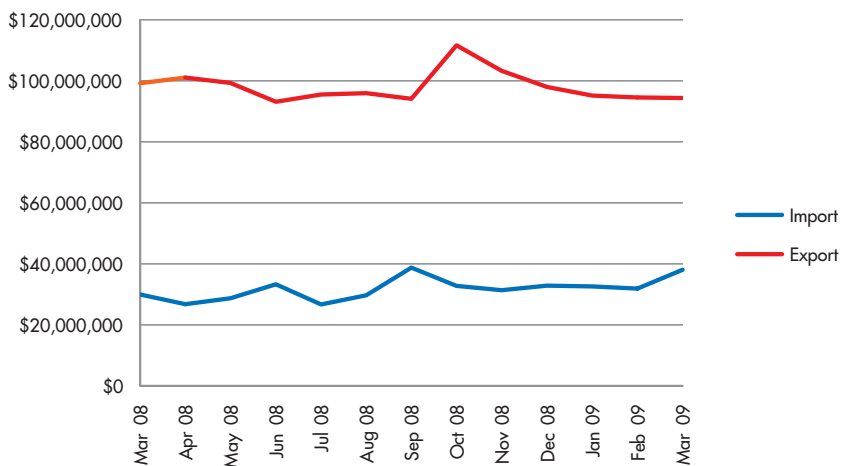
For more on how to use trade data, visit www.petfoodindustry.com/tradedata.aspx.

which encompasses over 70% of import activity. Truck, rail and air activity are not provided at a manifest level of detail.

US Customs export data is not as readily available as import data at shipment level; however, it is expected to be more widely available in the coming years. It is important to

Figure 1: Import/export trends for dog and cat food

The most referenced form of trade data is gathered by the US Census Bureau. At the lowest level, it harmonizes product data—for example, the total value, in US dollars, of all dog and cat food (HTS code 230910) imported and exported in 2008.



note that HTS numbers and the value of goods are not listed on the data provided by US Customs.

The data on a bill of lading will show who imported a product and what company they received it from. In the sample here (Figure 3, p. 26),

the data shows the company that imported dog chews and who manufactured them in Taiwan. The product descriptions for this data will also be more detailed than Census data, possibly providing size and number of each type of chew imported.

Figure 2: Top 5 countries, first quarter 2009

US Census data can show which countries export the most dog and cat food in airtight containers (HTS code 2309100010) to the US and which countries receive the most exports from the US. This data is provided in vessel values and weights.

Imports	Value (US\$)	Weight (kg)	US\$/kg	Value change*	US\$/kg change*
China	\$42,741,741	7,119,275	\$6.00	40%	60%
Thailand	\$25,644,108	9,805,648	\$2.62	18%	16%
Australia	\$2,524,915	2,370,109	\$1.07	39%	16%
Brazil	\$862,793	190,356	\$4.53	17%	63%
Ireland	\$270,960	64,401	\$4.21	-36%	4%

Exports	Value (US\$)	Weight (kg)	US\$/kg	Value change*	US\$/kg change*
Japan	\$71,909,736	47,535,156	\$1.51	18%	20%
Australia	\$16,481,027	12,226,884	\$1.35	26%	-3%
New Zealand	\$5,651,491	5,231,636	\$1.08	-7%	-4%
Belgium	\$5,378,916	3,462,632	\$1.55	41%	52%
Hong Kong	\$4,230,523	3,063,354	\$1.38	56%	1%

*Changes compare to first quarter 2008

Figure 3: Bill of lading sample

For detailed information, US Customs collects information on every shipment entering the US at a bill of lading level. Each bill of lading, such as this sample, shows who imported the product and the company that exported it.

Search Criteria		Carrier: -- ALL --		Int'l Port: -- ALL --		US Port: -- ALL --		Bill of Lading: COSU6024414440	
Desc./Marks: -- ALL --		Shipper: -- ALL --		Consignee: -- ALL --		Notify: -- ALL --		Notify 2: -- ALL --	
All Company: -- ALL --		ALL Text: -- ALL --		House/Master: House + Master		Arrival: -- ALL --			
Bill of Lading: COSU6024414440		House/Master: House		Estimated Arrival: 090418		Actual Arrival: 4/18/2009			
Arrival: 4/20/2009		Carrier: COSU		Vessel: Hanjin Dallas		Vessel Code: 9295220		Voyage: 0034E	
Shipper		Consignee		Notify		Notify 2		Mode of Transportation: 11	
Joc Great Wall Corporation		Waggin' Train, Llc		Unid Ocean Transport Incorporated		Suite 230 9660 Flair Drive			
Jiangning Dis 8 South Liyuan Road		Suite 101 1493 East Bentley Drive		Suite 230 9660 Flair Drive		El Monte Ca 91731			
Nanjing Js 210000		Corona Ca 92879		El Monte Ca 91731		United States			
China		United States		United States					
52782819		7366869 7361866							
Port: 57035 - Shanghai, China		Port: 2709 - Long Beach, CA		In Bond:		Weight: 9786 (KG)			
Place Receipt: Nanjing				US Dist Port:		Quantity: 699 (CTN)			
				Foreign Port:		Measurement: 71 (CM)			
						TEU: 2.0			
Container Number		Quantity		Product Description		Marks and Numbers			
CBHU8819521		699		Pet Goods All Natural Chicken Breast Jerky Tenders		Vendor Pack 3.5 Oz Chicken Jerky Tenders		Waggin'train- Anderson,sc	

Intelligent analysis

Trade data clarifies where products come from, who is producing and purchasing them and how much is currently in the market.

By intelligently analyzing this

information, petfood companies are more accurately forecasting supply, deriving price trends and creating a clear understanding of how they interact with both their competitors and suppliers.

Paul Rasmussen is the CEO/ president of Zepol Corp., a provider of US Customs and Census Bureau trade data, www.zepol.com.



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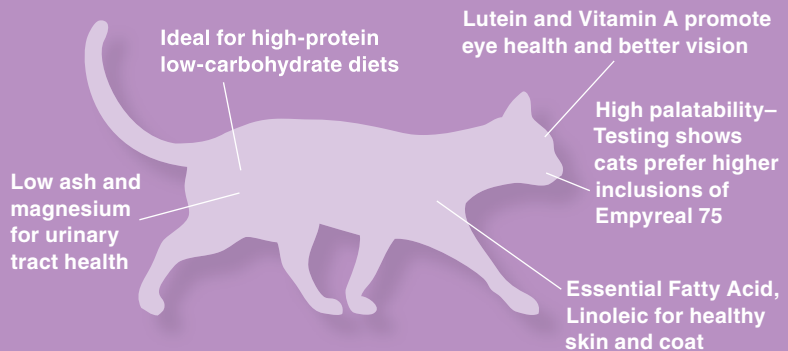
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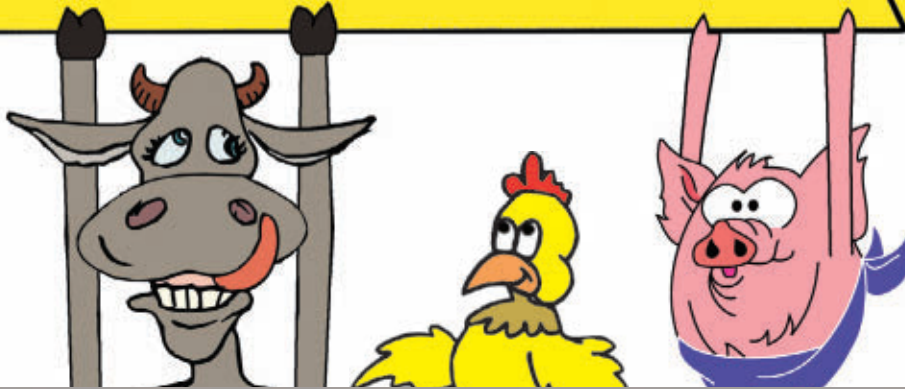
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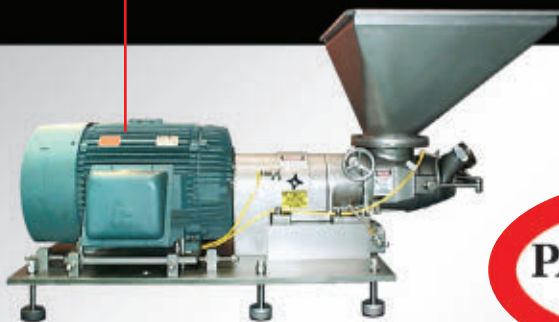
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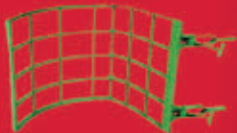
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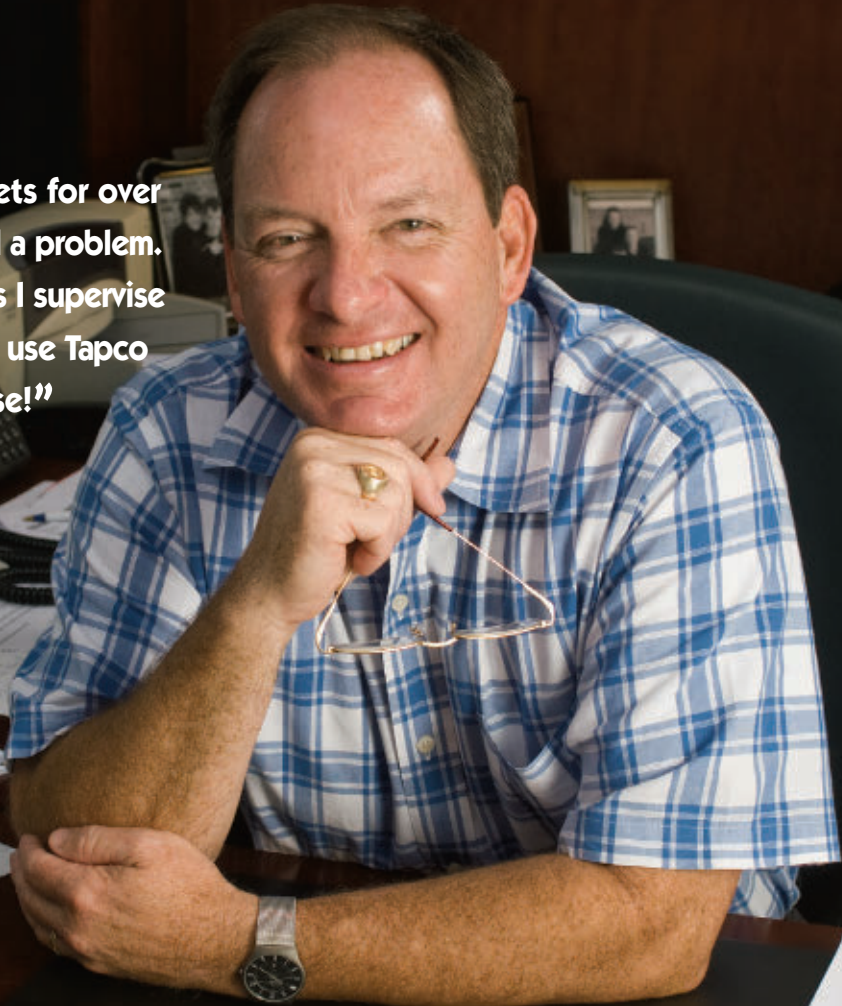
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Research Notes

Key Concepts

► Carbohydrate fermentation in dogs

(JAPAN 93:305-312.
doi:10.1111/j.1439-0396.2009.00931.x)
Correlations in chemical composition of substrates confirm the effectiveness of the *in vitro* gas production technique in evaluating dog feeds.

Carbohydrate fermentation in dogs

The *in vitro* gas production technique (IVGPT), including measurements of accumulating gas during fermentation and end-product determinations, gives a picture of microbial activity kinetics.

The aim of the study was to understand the *in vitro* fermentation characteristics of different carbohydrate sources using *inocula* (feces) from

two dog breeds—German Shepherd and Neapolitan Mastiff—fed the same dry food.

The feces samples, diluted and filtered, were incubated at 39C under anaerobic conditions with nine substrates (rice, corn, potato, spelt, pure cellulose, beet pulp, wheat bran, inulin and fructo-oligosaccharide). After 48 hours, the fermenting liquor was analyzed for pH and volatile fatty acids. Organic matter digestibility (OMD) was calculated as the difference after burning the residuals.

OMD, gas production and end products were significantly correlated with chemical composition of substrates, in particular carbohydrate fractions (total dietary fiber and starch), confirming the effectiveness of IVGPT in evaluating dog feeds. Comparing the two breeds, significant differences ($p < 0.01$) were found for OMD, gas production, fermentation kinetic parameters and end products, suggesting a different pathway of fermentation and, consequently, a different anaerobic population.

Source: M.I. Cutrignelli, *et al.*, 2009. *In Vitro* Fermentation Characteristics of Different Carbohydrate Sources in Two Dog Breeds (German Shepherd and Neapolitan Mastiff). JAPAN 93:305-312. doi:10.1111/j.1439-0396.2009.00931.x



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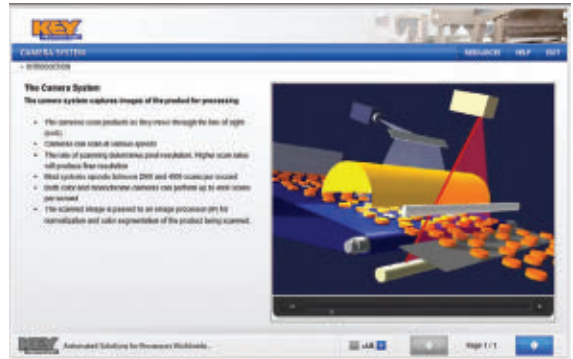
Product News



Temperature data logger

Dickson's new stainless steel case data loggers are designed for monitoring temperatures of wet pet areas. The loggers feature watertight, food grade, HACCP and FDA-compliant stainless steel cases, according to the company. The HT220 and HT225 models offer extra-sturdy reinforced probes.

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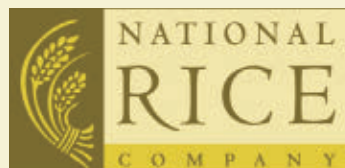
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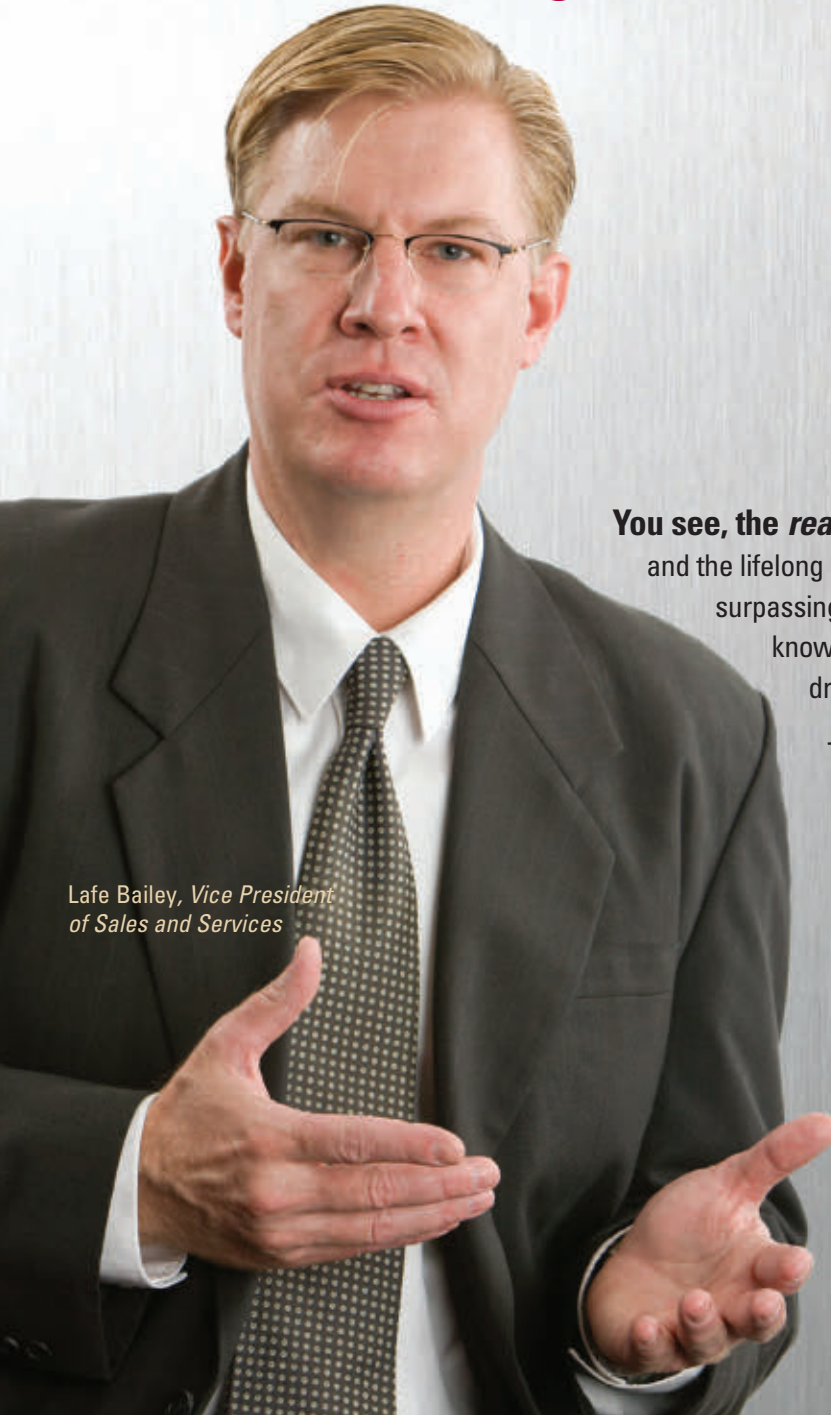
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