



A N N U A L
R E P O R T
2009



PFMA Mission Statement

PFMA aims to be the credible voice of a responsible pet food industry. While striving to achieve a balanced regulatory environment for the production of nutritious and safe food, PFMA also encourages responsible pet ownership working in partnership with relevant pet bodies. It aims to be the main resource for its members, public and others as well as playing a lead role in forming opinions in Europe through the European Pet Food Federation (FEDIAF).

Chairman's Foreword



Welcome to the PFMA Annual Report for 2008. Inside you will find an account of our activities over the last year, alongside some useful information on pets and the pet food market.

This year we are launching our Pet Obesity Prevention Strategy. Whilst individual companies have done a lot of excellent work on this critical issue, this is the first time we have addressed this as an industry. The strategy will focus on prevention, by encouraging owners to get hands on with their cat, dog or rabbit to assess its weight. Feeding to the pet's body condition, taking into account (and encouraging) exercise, should hopefully help to reverse the trend in pet obesity.

For the second year running we have collected population data on a whole range of pet species. Both cat and dog populations have increased since last year, with cats growing in population by some 7% to overtake dogs in popularity (they are both now close to 8m each in number).

There is no doubt that, as with the rest of the economy, 2008 has been a challenging year for the pet food industry. Having said that, our latest industry data indicates sales are holding up better than expected, with a 7% increase in value terms in 2008. The pet food industry now stands at just under £2bn. We have seen a marked increase in sales going through specialist shops, noticeably for cat and dog dry complete products. There also appears to be a switch in production to the UK away from continental Europe, which is encouraging for our home-based manufacturers. Looking ahead, the economic situation may influence the growth of premium products with pet owners switching to economy.

It has also been a challenging year in respect of regulation coming out of Brussels. Firstly, we now have new rules for the labelling and marketing of pet food. Through the enormous efforts of our European trade body FEDIAF, and through our excellent relationship with the Food Standards Agency, we believe we have achieved the best possible result for our industry. We had originally been faced with full ingredients listing which would have been impossible to manage, particularly on multi-lingual packs. The final result will not change the label dramatically but will, we believe, provide more meaningful information for consumers. We have also seen progress on revised Animal By-Products legislation. We were initially faced with a disastrous proposal to open up the raw materials available for pet food. Our industry has always prided itself on the strict and sustainable use of by-products surplus to human food requirements. These come from animals inspected by vets as fit for human consumption. We went beyond the law on this for many years, up to the regulations coming into force, and did not wish to see any dilution of our policy. Thankfully we have had the support of many people in the regulatory process and it now looks like we will maintain the status quo.

So we anticipate another year of challenges, primarily coming from the volatile market conditions. At the same time we are excited about the launch of our obesity strategy and getting our message across about managing pet obesity and we look forward to working with all our stakeholders to start to reverse the trends in pet obesity.

Jean Harper,
Chair PFMA



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About Us

PFMA's Aims and Membership Benefits

PFMA aims to be the credible voice of a responsible pet food industry. While striving to achieve a balanced regulatory environment for the production of nutritious and safe food, PFMA also encourages responsible pet ownership working in partnership with relevant pet bodies. It aims to be the main resource for its members, public and others as well as playing a lead role in forming opinions in Europe through the European Pet Food Federation (FEDIAF).

PFMA have been supporting pet food manufacturers for 39 years. Membership of PFMA means that you will be able to gain one to one expert advice and guidance on all matters related to the pet food industry.

PFMA Membership Benefits include:

- Specialist advice and **support on regulatory and technical matters**
- The opportunity to **influence policy and legislation** through joining PFMA committees
- Access to **members only website** (a one stop shop for information on developments in the pet food industry)
- **Networking opportunities** (with other members and those involved in the pet industry)
- **Media and public relations** support
- Members only **market data**
- **Training seminars** and workshops
- **Crisis Management support** (e.g. Disease out-break)
- **Promotion** through the PFMA website links and banners

Meet the PFMA team:

MICHAEL BELLINGHAM – Chief Executive. Michael joined PFMA in 2004. He has worked in the trade association world for a number of years, firstly with the British Retail Consortium, before moving to the Food and Drink Federation in 1996, then the Federation of European Rice Millers (FERM) in Brussels in 2000. Michael shares his home with Smilla the tabby, as well as his wife and son.

NICOLE HARRISON – Communications Manager. Nicole Harrison joined the PFMA in 2003 as the PFMA Communications Executive. Nicole has responsibility for media relations and the work the association undertakes promoting animal health and welfare. Nicole is the proud owner of a ginger and white moggie called Poppy.

DR MONIKA PRENNER - Technical and Regulatory Affairs Manager.

Monika deals with all issues related to legislation and technical questions. Her experience in international food and feed legislation and her knowledge of the EU processes are valuable in discussions with UK agencies and stakeholders in current consultations on future legislation.

HOLLY HUNT - Junior Executive. Holly works in events and as an enquiry point for the public, press and members. Holly has a degree in Animal Behaviour Science (Hons) and runs her own behavioural business and puppy classes. Holly's family own a dapple grey gelding fondly known as 'Tally', two cats namely 'Ziggy' and 'Dylan' and a 25 year old Cockatial called 'Monty'.



PFMA was founded in 1970. This was our second logo.



Michael Bellingham



Nicole Harrison



Monika Prenner



Holly Hunt

PFMA Member Services



The PFMA's work is effectively achieved through a committee-based structure in which all member companies are invited to participate. Policies for the pet food industry are formed in these committees in direct response to legislative and technical matters. All PFMA members are kept up-to-date on the Association's activities and are regularly consulted on specific issues.

In recent years a great deal of new and amended legislation has been introduced which has affected the pet food industry. Membership of PFMA is an effective and easy way for companies to ensure they are fully aware of all current developments in the industry. For example, when changes are proposed in legislation, members of the PFMA will not only receive advance warning and an opportunity to comment, but will also receive an explanation of the practical implications of such changes.

Other services include:

Members-only extranet

The extranet contains a wealth of information via a protected system. Members can find out about the latest industry news, download key pieces of legislation and raise any issues with the membership through the forum facility.



PFMA Market Data Scheme

We offer member companies the opportunity to participate in the PFMA market data scheme which has been running since 1995. The scheme is coordinated by MIML Market Research and the purpose is to collect sound, robust industry data. Data is collected on an annual basis and a bumper market report is produced for scheme members.

Through participating in the scheme members can:

- Estimate their market share
- Look at their performance in comparison to the market as a whole
- Keep up to date with trends in the pet food market
- Better understand the performance of different pet food categories

In addition to information on market value and volume, the survey of members also collects information on:

- The proportion of own-label versus branded products
- The location of manufacture
- The channel through which the product is distributed.

While not aiming to be representative of the total market, these additional questions provide information on broad trends.

There is also a section of the survey that collects members' opinions on trends in the market – this year focussing on emerging sub-markets.



About Us

PFMA Officers and Committees



EXECUTIVE COMMITTEE

Establishing and monitoring PFMA policies, direction and focus.

Chair: Jean Harper
PFMA Secretariat: Michael Bellingham

REVIEW COMMITTEE

Identifying, monitoring and commenting on all legislative and other developments in the marketing and technical areas.

Co- Chairs: Arthur van Raalte/Liz Colebrook
PFMA Secretariat: Monika Prenner

ADDITIVES WORKING PARTY

Monitoring and influencing legislation concerning additives.

Chair: David Southey
PFMA Secretariat: Monika Prenner



VETERINARY NUTRITION SUB – COMMITTEE

To consider all veterinary & nutritional issues. Providing a resource to members and the public.

Chair: Adrian Pratt

PFMA Secretariat: Nicole Harrison

SMALL ANIMAL WORKING PARTY

To act as an issues forum and a representative body on matters related to small animal nutrition.

Chair: Nigel Bateson
PFMA Secretariat: Michael Bellingham

ENVIRONMENT COMMITTEE

Monitoring and recommend policy on environmental legislation and other environmental issues of impact to the industry

Chair: Keith Battye
PFMA Secretariat: Michael Bellingham

RAW MATERIALS WORKING PARTY

Dealing with legislation affecting raw materials, such as the Animal-By-Products Regulations and relevant EC Directives

Chair: John Turner
PFMA Secretariat: Monika Prenner

COMMUNICATIONS COMMITTEE

Develop strategies to communicate effectively with both internal and external audiences. Manage media relations and PFMA's responsible pet ownership activities.

Chair: Mary Sharrock
PFMA Secretariat: Nicole Harrison

PFMA Website
www.pfma.org.uk



The PFMA website is the Association’s principal communication tool providing independent and good quality information to the public. In 2009 we are applying significant updates and remodeling to the site to make it more user friendly and accessible.

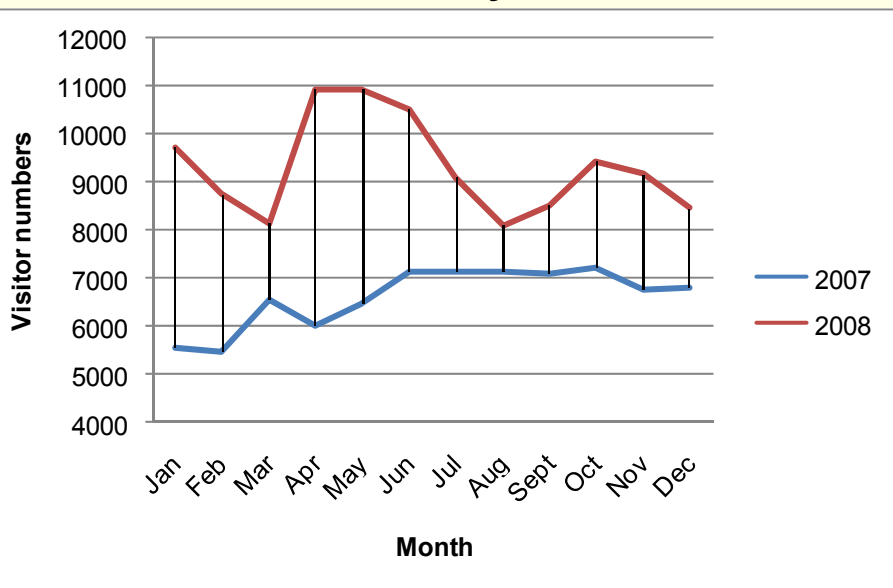
In 2008:

Ranking	Search engine	No. of searches
1	Google	17,000
2	Windows Live	3,000
3	Yahoo	1,500
4	MSN	650
5	AOL	400
6	Ask Jeeves	350

Source of PFMA web traffic during 2008

- Website activity has increased by 47% in the last year and we now receive an average of **311 visitors per day**. We received almost **30,000** visitors last year alone.
- We have received great interest in our online documents with over **30,000** downloaded. Popular documents include; ‘Historical Pet Population Data’, ‘Reasons for choice of pet’, Pet ownership by region’, ‘what’s in pet food - cat and dog nutrition’ and ‘ A review of the pet food market’.
- The most popular pages on the PFMA website at the end of 2007 were: ‘Pet Food Company Details/Contacts’, ‘Overall Pet Populations’, ‘About Us’, ‘Press Office’, ‘Pet Food Market Data’. ‘Pet Statistics’ and ‘Pet Nutrition’.

PFMA website activity 2007 to 2008



PFMA Website Summary for 2008

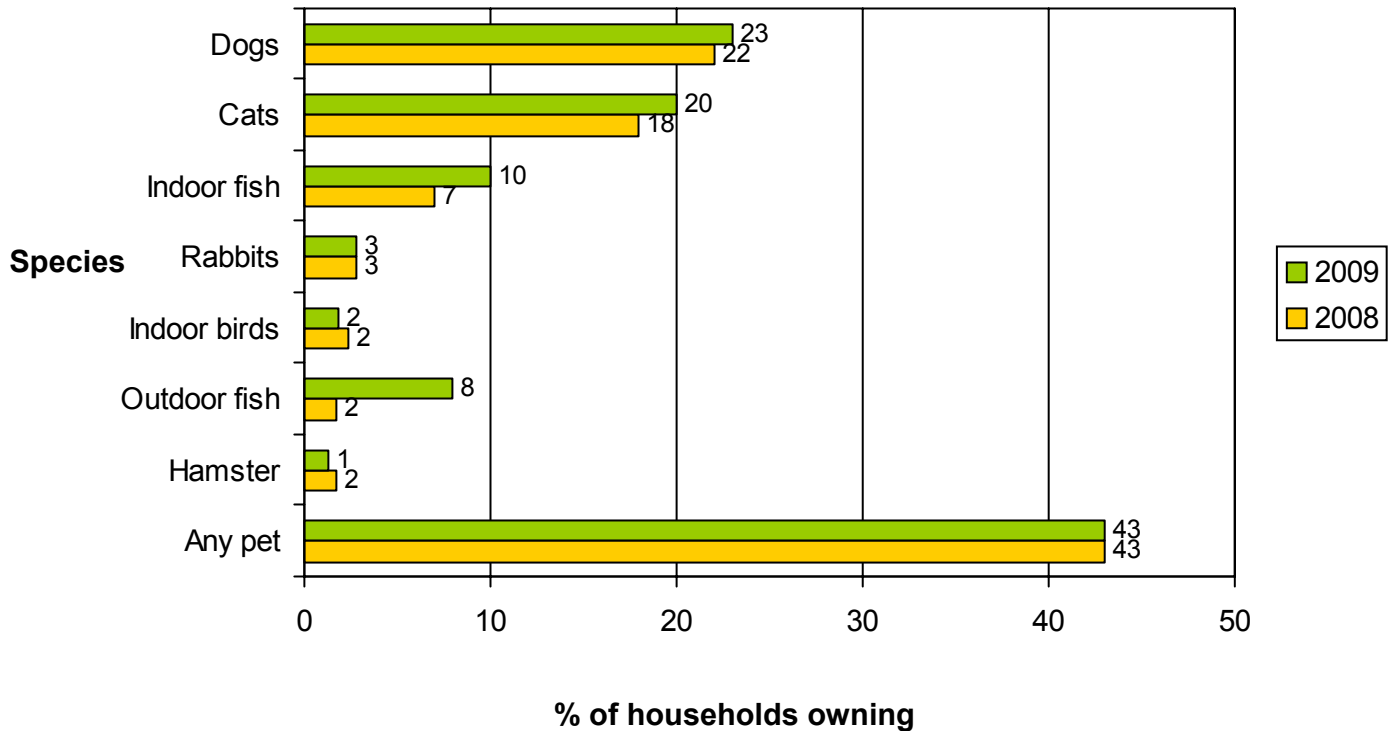
Total hits: over **2.5 million**
 Total visitors: **over 100,000 thousand**
 Total pages viewed: over **1.2 million**

Average hits per day: **over 7,000**
 Average visitors per day: **over 300**
 Average pages viewed per visitor: **11**

Statistics

The UK Pet Population and Demographic Data

2008 and 2009 UK Pet Ownership comparison



In the UK, almost **1 in 2** households own a pet (**43% = 11.2M**), with a total **23 million** pets owned (excluding fish).

In 2009 the percentage of the population owning a pet in the UK included;

- Dog: **23%** (6.0 million households)
- Cat: **20%** (5.2 million households)
- Rabbits: **2.8%** (0.7 million households)



Research details:

- Research conducted by TNS
- Face-to-face interviews
- Representative sample of the UK population
- 2,126 interviews completed for all questions
- Look out for our obesity related research in our White Paper

The Pet population of the UK

There are now **23 million pets in the UK** (excluding fish), which include some of the following:

- 8.0 million dogs:** An increase of up to 6% on last year
- 8.0 million cats:** An increase of up to 6% on last year
- 2.3 million small animals:** Around 1.0 million rabbits, 0.5 million guinea pigs
- 1.6 million birds:** Including caged, fowl and pigeons
- 2.7 million others:** Including exotic pets, horses and insects

* Note: not all sub-totals add to give exact figure of totals – this is due to the rounding of figures



Statistics

Pet Food Market Data

PFMA data collection

The annual PFMA survey asks participant members to submit figures on the amount and types of pet food they supply to the UK pet food market. These data are provided confidentially to an independent third party who collates the results on behalf of participant members.

2008 Total Market data



The pet industry in the UK is continuing to grow, up in value by **7% in 2008** and now stands at just under **£2bn**.

Around **43% of UK households own a pet** (see Pet Ownership), with cats and dogs continuing to be the most preferred companion. There are around **8 million each of dogs and cats in the UK**.

The **Dog Food market** grew marginally in 2008 by **1%**, in volume terms, but the value of this market showed healthier growth of around **6%** to just **over £1.1bn**.

The **Cat Food market** continued to see a fall in the volume of product sold, to around **413,000 tonnes** in 2008. However, as a result of innovation at the premium end of the market, the value grew by **6%** to **£784m**.

The **Small Animal** pet food market (for rabbits, guinea pigs and rodents) is small in comparison to the dog and cat market, but was the most buoyant in 2008, showing growth in volume of **3%** and growth in value of **14%**. The total size of this market currently stands at **£64m**.

In each of these three markets there were considerable differences in the performance of different sub-markets. These will be examined in subsequent sections.



2008	Volume	Value	Volume	Value
	000 tonnes	£m	% growth	% growth
Dog	845	1,127	1%	6%
Cat	413	784	-1%	6%
Small animal	78	64	3%	14%
Total	1,336	1,975	1%	6%

It should be noted that where market value figures are shown in the report, these refer to consumer spending exclusive of any VAT that may apply to each product.

Statistics

Pet Food Market Data

Prepared dog food market

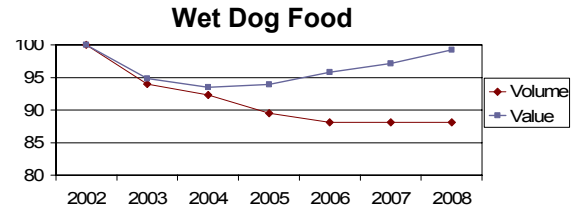
The prepared dog food market is broken down as follows:

All wet food £376 million (2% growth on 2007)

Dry complete £432 million (8% growth on 2007)

Mixers £28 million (1% growth on 2007)

Treats £203 million (11% growth on 2007)



Prepared cat food market

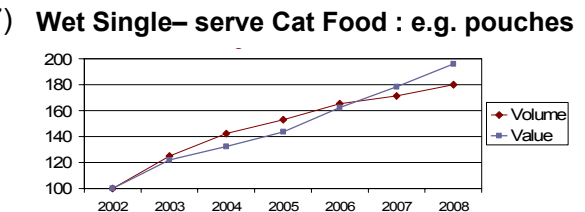
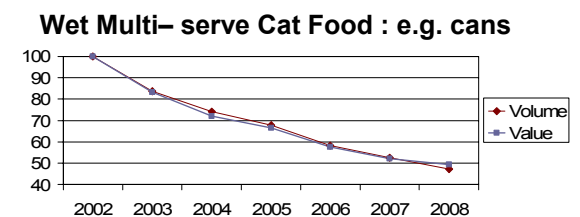
The prepared cat food market is broken down as follows:

Wet single serve food £436 million (10% growth on 2007)

Wet multi-serve food £151 million (5% reduction since 2007)

Dry complete £182 million (5% growth on 2007)

Treats £15 million (10% growth on 2007)



Market Trends in 2008

Dog Market

Participating PFMA members expect the trend from **Wet Dog** food to **Dry Dog** food to continue (in volume share terms), partly because of the need for greater convenience and space saving, and also because of issues such as the lower odour of **Dry Dog** food. There is however a counter-argument, which is that some pet owners believe **Wet Dog** food is both healthier and more appetising for their pets – particularly for small dogs, which are increasing in popularity. It was also noted that there is a core group of loyal 'wet users'.

Cat Market







Looking forward, PFMA members expect the trend from **Multi-Serve Cat Food** to **Single Serve** product to continue, because of Single Serve's greater convenience (in terms of transport, storage and use) and because cat owners tend to be less price sensitive than dog owners (as they do not have to buy such great volume of product). There are some members who believe there will be a reversal of the trend from wet to dry product, with this change driven by widespread phenomena such as the desire for more natural, healthy products, as well as increasing numbers of owners believing wet food is more attractive for 'fussy eaters'.

Further statistics, including historical data, is available on the PFMA website:





www.pfma.org.uk.



PFMA Timeline

<p>1970</p>	<p>The Pet Food Manufacturers Association was established comprising of 4 members</p> <p>Market value -£73 million, market volume -470, 000 tonnes Dog Population 5 million Cat population 4.25 million</p>	
<p>1971</p>	<p>Brand varieties were introduced</p>	
<p>1972</p>	<p>3 day week introduced to save electricity</p>	
<p>1973</p>	<p>Can rationing – UK joined the EEC, PFMA joined the European Pet Food Manufacturers Association (FEDIAF)</p>	
<p>1974</p>	<p>The US National Research Council (NRC) published their first recommendations on the nutritional requirements for cats and dogs.</p>	
<p>1975</p>	<p>The first thesis was published on the amino acid requirement for adult mature dogs. Dog population 5.7 million. Cat population 4.5 million Manufacturers begin to introduce 'life - stage' diets, starting with the puppy diet.</p>	
<p>1976</p>	<p>The Joint Advisory Committee on Pets in Society (known as the Pet Advisory Committee (PAC)) was formed to examine the role of companion animals in society and encourage responsible pet ownership</p>	
<p>1979</p>	<p>Conservative Government Elected The Pet Health Council (PHC) was formed to promote the health and welfare of companion animals</p> <p>The Society for Companion Animal Studies (SCAS) was established to research the benefits to humans of animals and the scientific nature of the bond that develops between them</p>	 
<p>1980</p>	<p>Dog population 5.6 million Cat population 4.9 million 'Life-stage' products for other pet species at other stages in life become available.</p>	
<p>1981</p>	<p>The first zinc requirement values were established for cats- zinc is fundamental in over 200 bodily processes, including the immune system, skin and coat condition and cell growth.</p>	
<p>1982</p>	<p>Taurine, an amino acid only found in materials of animal origin, was found to be crucial for the healthy functioning of a cat. Taurine is vital for aspects of metabolism, eye sight, cardiac function, bile formation and reproduction. The first specific legislation for pet food was introduced – the Feedstuffs Regulations- covering labeling additives and contaminants. Research established the sulphur- containing amino acid requirement of puppies. These amino acids are essential for both growing and adult dogs</p>	
<p>1984</p>	<p>Research confirmed that protein requirements for adult cats were higher than in other species. Protein is essential for many aspects of body structure and function.</p>	
<p>1985</p>	<p>Dog population 6.3 million Cat population 6.1 million NRC Guidelines for nutrition of dogs were revised</p>	
<p>1986</p>	<p>NRC Guidelines for nutrition of cats were revised</p>	
<p>1987</p>	<p>PFMA launched a campaign to remove VAT from pet food and highlight the injustice of the tax to government</p>	
<p>1988</p>	<p>National Pet Week (NPW) was established to promote responsible pet ownership, PFMA is a founding member.</p>	
<p>1989</p>	<p>The PFMA responsibly adopted a voluntary ban, ahead of legislation, on the use of specified bovine offal's (SBO) in pet food, in the wake of BSE</p>	

PFMA Timeline

1990	Dog population 7.4 million, cat population 6.8 million The government incorporated the PFMA voluntary ban on SBO's into legislation	
1992	The Animal By Products Order was introduced which defined the ingredient and materials permitted for use by industry, and required manufacturers to be registered	
1993	The cat population exceeded the dog population for the first time	
1995	Dog population 6.6 million, cat population 7.2 million	
1996	The European Union banned the export of farmed beef from the UK when the UK government announced a possible link between BSE and nvCJD in humans. UK legislation brought pet food labeling into line with Europe	
1997	First Labour Government in 18 years The government introduced XAP legislation which implemented additional stringent controls on beef-based products	
1999	The EU announced the end of the UK beef export ban Dog population 6.7 million Cat population 7.7 million	
2000	Foil packs are introduced to the pet food market. The PFMA comprised 65 members, with market value of £1473.8bn and a volume of 1296700 tonnes per annum. PFMA launched their first website.	
2002	Dog population 6.1 million Cat population 7.5 million	
2004	Dog population 6.8 million Cat population 9.6 million	
2005	PFMA launches 'Petersercise' with PHC a new initiative to promote pet and owners health by increasing the number of activities they do together.	
2006	NPW becomes National Pet Month (NPM) due to great success. Work starts on the review of the FEDIAF nutrition guidelines for pet food manufacturing. The latest version of the NRC guidelines for dogs and cats is published.	
2007	The PFMA comprised 51 members, with market value of £1641.5bn and a volume of 1267900 tonnes per annum. PFMA launches new contemporary website (www.pfma.org.uk), logo and extranet.	
2008	PFMA take on the secretariat role of PHC. PFMA produces the findings of an independent survey on current pet populations in the UK. Dog population overtakes Cat population	
2009	PFMA launches their Obesity Campaign and White Paper. Cat and Dog population back to level pegging estimated at around 8 million each. Pet Food Market valued at just under £2bn	

External Communications Relations with Government, Parliament and Media



In July PFMA sponsored an APGAW (All Parliamentarian Group for Animal Welfare) reception based around the theme the **Positive Benefits Animals Bring to our Lives**. Over 90 people attended the event to listen to speakers from Pets as Therapy, the Society for Companion Animal Studies and the Metropolitan police who brought their dogs to give demonstrations on the work they do.

MP Lunch

Once again a successful lunch for MPs was hosted by PFMA this year, with a high turnout from across the political spectrum. Roger Gale MP was kind enough to host the event and lead the stimulating discussion on subjects as diverse as VAT on pet food to the lack of pet policies in care homes for the elderly. Other MPs attending included; Bill Wiggin (Conservative, Leominster), Martyn Jones MP (Labour, Clwyd South), Eric Martlew MP (Labour, Carlisle), Anne McIntosh MP (Conservative, Vale of York), Andrew Stunell (Liberal Democrat, Hazel Grove).

Building links with our key stakeholders - PFMA holds a Focus Group Event



In spring 2008 we sent a questionnaire to our external stakeholders to seek comments on the services the PFMA provides. We contacted over 300 organisations and achieved a good response rate from a variety of backgrounds including veterinary, media, charity and the relevant government bodies. The responses were encouraging and provided invaluable feedback. To probe further, we subsequently held a focus group event and concentrated on specific areas such as the PFMA website and the information resource we provide to the public, specifically looking at nutrition. Based on this, PFMA has been active in a number of areas, for example re-vamping the website to make sure it speaks more clearly to its target audience. Thank you to the organisations that supported this event.

Media relations

The food we feed to our pets continues to be a topic of much interest to the media. We very much welcome this attention as it enables us to get our messages across highlighting how important a balanced diet is for good health. As always, areas of interest very much reflect trends in the human arena, such as the increasing popularity of natural focused and organic foods. There are still a number of old pet food myths that we work hard to dispel; the media is on occasion surprised by the regulations and standards industry adheres to. With the launch of our obesity campaign this March we will also be promoting good feeding habits and the benefits of a prepared pet food diet.



The PFMA Communications Committee are responsible for both the government and media relations.

Pet Ownership

Promoting Responsible Pet Ownership

Promoting Responsible Pet Ownership in partnership with other organisations

Recognising the many and varied roles pets can play in our life, the PFMA works with voluntary organisations, charities and associations to help encourage responsible ownership and promote animal welfare to allow everyone to benefit from animals in our society. PFMA is a trustee of the **National Pet Month** charity and a member of the **Pet Health Council**, **Pet Advisory Committee**, **Society of Companion Animal Studies** and the **All Parliamentary Group for Animal Welfare (APGAW)**.



PFMA Working with the Society of Companion Animal Studies (SCAS)

It can be lonely for pet owners in care

The number of elderly people in the UK is growing every year, and many will eventually need residential care. Around a quarter of all people over retirement age own a pet, but according to research published by the Society of Companion Animal Studies (SCAS) and funded by the PFMA, only 29% of care facilities routinely allow pets. The importance of pet ownership seems to be largely ignored with only 24% of facilities asking potential residents whether they have a pet and only 35% having any formal policy about pets. The in-depth study of 234 care homes and sheltered housing units revealed that elderly people in over a third of residential care homes will suffer distress after giving up a beloved pet.



67-year-old dog owner Brenda Eustace is just one of many thousands of people who are affected by this problem. She suffers from mobility problems, high blood pressure and depression which make life alone in her basement flat increasingly difficult. With no immediate family, Mrs Eustace relies on friends and invalidity support to get by and has applied to move into sheltered housing. But dogs are not allowed and moving home without her Yorkshire Terrier, Cassidy, is unthinkable - so her daily struggle will sadly continue.

Older people who are forced to part with a pet to move into residential care can suffer feelings of bereavement that are similar to the loss of a family member. Severe reactions can lead to depression, disturbed sleep or eating patterns, and even physical illness.

Elizabeth Ormerod, Chairman of the Society for Companion Animal Studies and a practising vet said: "The importance of pets to older people cannot be understated; for some they are their best friend, their family and their only lifeline to the outside world. When age or ill health forces someone to move into care, why should they be parted from a loyal companion who offers them unconditional love and support, comfort and constancy?"

She continued: "I believe that people of all ages should have the right to benefit from animal companionship, as long as this is managed responsibly. So we're encouraging all housing and residential care providers to develop clear and carefully considered pet policies."



Pet Ownership

Promoting Responsible Pet Ownership



Cont... As well as exploring the impact of pet policies on older people, the study contacted 23 animal shelters and 44 veterinary surgeries to find out what implications there are for animals. The results suggest that many thousands of healthy pets every year are tragically put to sleep on the request of their elderly owners or well-meaning family members who think they have no other choice. In fact, animal charities like The Blue Cross will often take in these pets and find them loving new homes.

The 'Pets and Older People in Residential Care' research findings are published in full on the SCAS website (www.scas.org.uk/petsforlife) which also offers essential information for care home providers and older people who are thinking about moving into care.



National Pet Month ran from 05 April – 05 May 2008 and celebrated 'Great British Pets'. To launch the month's festivities, the charity went on the hunt for the Modern Day Noah and asked the nation to cast their vote. The nation plumped for their favourite TV presenter, Paul O'Grady who came out on top with 68% of the votes; his closest rivals to the title were Her Majesty the Queen and Graham Norton, who both scored 7%. Jonathan Ross, all round animal lover and the favourite to win only scored 3% (*A survey of 1,000 pet owners through K9 media*).

In conjunction with Your Cat and Your Dog magazines, NPM also ran a photographic competition looking for cute, crazy, talented and lovable pets and winning entries were displayed in our first ever 'Hall of Fame' photographic exhibition at Selfridges, London.

All our endeavours aimed to celebrate the bond between people and their pets and highlight the importance of responsible pet ownership. In addition to our publicity work, people up and down the country held events under the NPM banner and raised funds for local charities, whilst promoting our core aims. The fun and frolics over National Pet Month enabled us to get our serious pet care messages to just over 80,000,000 people.

NPM will continue to raise awareness this year. With the government's Change4Life campaign hitting the headlines and a focus on improving the nation's health, NPM's 20th anniversary campaign, 'Healthy Pets Make Happy Pets' couldn't be more timely. **Tapping into the current social trend of health and wellbeing and extending it to the UK's animal population, NPM, taking place from 4th April – 4th May 2009,** will once again be campaigning for responsible pet ownership, aiming to improve the health and fitness of the nation's pets and their owners.

Phil Sketchley, Chairman of NPM said:

"With so many pets in the UK facing health problems, we want next April's 'Healthy Pets Make Happy Pets' theme to enable pet owners not only to detect signs of ill health in their animals, but give them guidance on how they can help maximize their companion's well being. The government's recently launched Change4Life initiative, challenges human nutrition and health, and we want to do the same for animals. With the help of sponsors such as Iams, Countrywide and for the first time in 2009, Pfizer Animal Health, I'm sure we can encourage responsible pet ownership amongst an even wider audience.

To find out how you can get involved, please visit: www.nationalpetmonth.org.uk



Pet Ownership

Work with Pet Organisations

Pet Advisory Committee (PAC)

The Pet Advisory Committee continues its major role of lobbying on companion animals issues. This has been enhanced with the election of Andrew Stunell MP as Chairman of PAC.

Following the production of the 'Pets and Housing' document in 2007, the PAC has sought to increase its use by housing authorities through attending a number of relevant conferences and generally raising the profile of the guidelines; these activities will be intensified in 2009. Some work is also being done to encourage private landlords to allow pets in their accommodation.



PET
ADVISORY
COMMITTEE

Over the last 2 years, PAC has been developing its relationship with the England Implementation Group, which has responsibility for driving forward Defra's animal welfare policy. PAC has been responsible for devising a health and welfare strategy for dogs and cats which has been shared with the EIG. The document has been agreed by member organisations and the group is working on a prioritised list of actions. However, there is some uncertainty over the future of the England Implementation Group as a result of the government's review of its efficacy and PAC's activity will resume when the way forward has been confirmed.

The PAC website is currently undergoing plans for a revamp and will be re-launched in 2009.

Members of the Pet Advisory Committee include: Blue Cross, British Small Animal Veterinary Association, British Veterinary Association, Cat Protection, Feline Advisory Bureau, Dogs Trust, Federation of Companion Animal Societies, The Kennel Club, National Office of Animal Health, Ornamental Aquatic Trade Association, Pet Care Trust, Rabbit Welfare Association and fund and the Pet Food Manufacturers' Association.

For further information: www.petadvisory.org.uk



Pet Ownership Pet Health Council



PFMA is a Member of the Pet Health Council

PHC is a unique organisation which handles issues related to pet and human health promoting the message that pets are good for people. It provides a resource to the media with a wealth of spokespeople who can comment on a range of subjects from the health benefits of pet ownership to caring for your pet.



The expertise comes from a broad membership of pet and human health professionals including:



- British Veterinary Association (BVA)
- British Veterinary Association of Small Animals (BSAVA)
- Society of Companion Animal Studies (SCAS)
- National Office of Animal Health (NOAH)
- Association of Pet Behaviour Counsellors (APBC)
- Royal College of Nursing (RCN)
- Royal Pharmaceutical Society of GB (RPSGB)
- PFMA



In 2008 PHC welcomed 3 new members on board:



- PDSA
- Pets As Therapy
- Pet Care Trust

In 2008 PHC received around 60,000 visitors to the website and handled over 100 calls to the press office.



The issues we responded on included:

- The rise in animal cruelty figures
- The benefits of pet ownership
- The benefits of pets in the classroom
- Dog Breeding
- Increasing Dog Control Orders
- Exotic pet ownership
- Importance of fitness for pets and people
- MRSA
- Pet obesity



PHC provides the following:

- Care leaflets for keeping a healthy, happy pet.
- Up-to-date news and comment on current issues related to pet health.
- Research on the health benefits of pet ownership.
- Tri-annual pet care bulletins – particularly appealing to the media.



To find out more:

www.pethealthcouncil.co.uk
enquiries@pethealthcouncil.co.uk



Pet Nutrition

Pet Obesity

The PFMA Veterinary Nutrition Committee is a valuable asset for the Association. The group includes representatives from companies within the membership with veterinary or nutrition expertise. There are 9 active members from 9 different companies (Hills Pet Nutrition, Nestle Purina, Royal Canin, Iams, JRS Nutrition, DSM Nutrition, Rolf C Hagen, GA Partners and Wafcol) ensuring that any information we provide is truly independent. Day to day activities of the Committee include responding to any public and media enquiries related to pet food and pet nutrition.

Part of the work conducted by the Veterinary Nutrition Committee is to examine current nutrition and health related issues. This can be done through member research conducted via literature surveys and last year one of the issues addressed/researched was independently corroborated by a nutritionist at one of the UK's veterinary schools. In this way, PFMA makes sure it keeps abreast of the latest nutritional information.

The group has also been key in steering the progress of the PFMA obesity prevention campaign.

Preventing Pet Obesity – PFMA Launches its Campaign

PFMA has been involved in a number of projects building awareness of the consequences of obesity, educating on preventative measures such as fitness and good nutrition, and working in collaboration with other organisations. March 2009 will also see the launch of our own campaign with the focus very much on building awareness of good feeding habits with a call to action for pet owners to get hands on and monitor their pet's size on a regular basis. Highlights of our campaign will include:

- An Obesity White Paper packed with facts and figures on the issue, expert opinions and case studies
- A pet owner friendly Body Condition Score Chart Tool (a 5 step visual and physical system owners can use to help monitor their pet's weight).
- A Family Pledge: PFMA will be calling on families to making feeding time a family affair. With different members of the family treating here and there, it can be really difficult to know how much food is actually going in. We are asking families to be conscious of this and to make pet feeding for youngsters an enjoyable family task.
- A children focused microsite which will make learning fun and help children take more responsibility for their pet working with their parents.

"Many pet owners may believe that their pet is healthy and it could come as a shock when a professional breaks the news that their pet is in fact overweight. Misperception of pet body condition most certainly is a factor in pet obesity and one which needs to be recognised so that positive steps can be taken to ensure the number of overweight pets in the UK is reduced"

- Glasgow Vet School, Dr Philippa Yam.

All our tools and resources can be downloaded from our website:

www.pfma.org.uk



Pet Nutrition

Ask The Expert

The PFMA Veterinary and Nutrition Committee provide the necessary expertise to respond to all nutrition related queries.

Ask the Expert



Our newly established 'Ask the Expert' feature on the PFMA website enables members of the public to post their nutrition questions online to receive a response from our experts within 7 days. With queries ranging from 'how much food should I give my puppy' to 'what's the difference between complete and complementary pet food', this has already proven to be a very popular service. If you'd like to get a flavour of the questions asked, visit the **Frequently Asked Questions** section of the website.

FEDIAF Nutritional Guidelines for Complete and Complementary Pet Food for Cats and Dogs



FEDIAF, the European Pet Food Association, produces a nutritional guideline for manufacturers to follow when producing complete and complementary foods for cats and dogs. These guidelines which detail the nutritional needs of cats and dogs at the varying life- stages are a review of the NRC Guidelines (the US based National Research Council) and other existing science on pet nutrition. The document is looked at on a regular basis to ensure it includes the latest knowledge and is peer reviewed by independent nutrition experts throughout Europe.

The guidelines are now available for download from the FEDIAF website: www.fediaf.org.uk

PFMA continues to promote this document to UK industry including both members and non members to ensure a high standard of pet food for our nation's pets.

The PFMA Veterinary Nutrition Committee Supports a Student Summer Project at Glasgow University



PFMA sponsored Glasgow University Veterinary School student, Rory Thompson, to conduct a summer project which collected data on the feeding habits of pet owners. The market research project was carried out in a PDSA clinic and a first referral practice. A total of 800 questionnaires were completed. Mr Thompson did an excellent job and a paper – Feeding practices and the use of supplements for dogs kept by owners in different socio-economic groups - was published in the Vet Record in 2008 (The Veterinary Record, November 22, 2008). We are delighted to hear that additional work has been carried out and some obesity focused findings will be presented at this year's BSAVA Congress (2-5 April).

Technical and Regulatory

Pet Foods Legislation

The pet food industry is subject to stringent legislation to ensure safe products of high quality. There are over 50 regulations which cover all aspects of the pet food cycle from ingredients and traceability to labelling and claims. For example, the legislation covering pet food ingredients stipulates that manufacturers must only use raw materials from animals that have passed veterinary inspections as fit for human consumption.

Most of the legislation applicable to pet food originates from the EU, mainly in the form of Regulations.

Pet food manufacturers are in a unique position. The raw materials used and the finished pet food are covered by a wide range of regulations that have either been intended for products for the human food chain or for farm animals.

This provides great security with regard to the raw materials (e.g. restrictions on residue levels of veterinary substances in meat and pesticides limits in cereal products).

In addition, industry has adopted a number of Codes of Practice which support the regulations and in some cases exceed legislative requirements.

Pet Food Safety and Labelling

A new Regulation on the Marketing and Use of Feed will be published in summer 2009. Manufacturers will have 12 months to update their product labels. This new Regulation on the Marketing and Use of Feed will shape the way pet food can be sold in the future. Over the last years PFMA has been very active influencing the future of pet food labelling by lobbying the UK authorities to ensure that a practical and proportionate approach is taken.

The new labels for pet food will provide essential information to consumers buying pet food. For example, there will be change to the way additives in pet food are labelled.

During the discussion in Brussels and with national experts, PFMA ensured that members were well informed about the possible changes and the expected time table by organising seminars and regular articles in the PFMA newsletter.

Fediaf Guide to Good Practice for Communication on Pet Food

The new Marketing Regulation encourages industry to produce a guide to Good Practice on Product Communication. The Guide will provide details on how to label products in line with the new Marketing Regulation, but will also provide information on claims and off-pack communications. Fediaf, the European Pet Food Federation, has already been working hard to produce Draft Guidelines which will be presented to members this year. Details of the Guide will then be discussed with the EU Commission and national authorities including enforcement officials. In the future it is anticipated it will be officially recognised and published in the Official Journal.



Technical and Regulatory

Pet Food Ingredients

Feed Hygiene Regulation



Since 2005 the EU Feed Hygiene Regulation has ensured that feed safety is paramount at all stages in the production of pet food. This new Regulation consolidates the requirements for hygiene, HACCP, facilities, storage, personnel and record-keeping. In 2007 the EU Commission formally recognised the Fediaf **Guide to Good Practice for the Manufacture of Safe Pet Foods**. The development of these Community guides to good practice was encouraged by the Feed Hygiene Regulation and their purpose is to ensure compliance with the hygiene and HACCP requirements of that Regulation.

Regulations covering animal based raw materials, e.g. The Animal By-Products Regulations 2005

The Animal By-products regulation applies to any animal based raw material used in pet food. The legislation lays down the health rules concerning animal by-products not intended for human consumption (Regulation (EU) Nr 1774/2002).

It defines the various kinds of animal by-products according to their risk potential which leads to an exclusion of any animal raw material that could potentially be a risk to human or animal health.

A number of agencies, such as the Meat Hygiene Service and Animal Health (former SVS) are responsible for the enforcement of the Animal By-Products Regulations, which cover classification, movement, storage, processing (including the licensing of premises) and documentation of any animal based raw material.

Furthermore, the Animal By-Products Regulations provide a clear classification of animal by-products, emphasising that only by-products from animals passed as fit for human consumption, but not intended for human consumption can be used for the production of pet food (so called *Category 3 material*). This is in line with previous legislation in this area and confirms the long-standing voluntary raw material policy of PFMA members.

Furthermore, PFMA members only use materials from species which are generally accepted in the human food chain such as beef, lamb, poultry, pork, fish, shellfish, rabbit and game (please see the PFMA Raw Materials Policy for details; copies are available at www.pfma.org.uk).

This key piece of legislation is currently being updated to ensure that provisions are proportionate and appropriate with regard to the risk of human and animal health. PFMA is supporting the UK Authorities by providing feedback and suggestion during the negotiation process.

Legislative measures to eradicate animal diseases

The manufacture and export of pet food containing animal based raw materials can be severely affected by an animal disease outbreak (Avian Influenza, Foot and Mouth Disease).



FEDIAF

PFMA is a founding and active member of FEDIAF, the European Pet Food Federation. FEDIAF was formed in 1970 and now includes 20 national pet food associations with more than 450 companies. It promotes the views and interests of the petfood industry before EU institutions and other international bodies, aiming at a legislative framework for the production of safe, nutritious and palatable pet food.

Fediaf also support the development of technical Guides to Good Practice for the industry. The main work for this guide is done in working groups that consist of technical experts. The Fediaf Guide to Good Manufacturing Practice is recognised by the EU and a link included on their official website.

In a similar way Fediaf produced nutritional guidelines for complete and complementary pet feed for dogs and cats have been compiled. Fediaf was not only able to attract a number of nutritional experts with practical experience in the industry, but was also fortunate to get feedback from a number of eminent academics working for leading universities.

This strong engagement by the industry in providing information and support via a trade body is beneficial not only for the manufacturers but also for their customers and ultimately for consumers. By aiming to establish guides to best practice on various areas the industry can lead the way and assure quality, safety and animal wellbeing beyond the legal framework.

FEDIAF AGM 2009

Each year members of FEDIAF take it in turns to host the Annual General Meeting. In 2007, it was the UK's turn and in 2008 we were invited to Slovenia. The official part of the AGM included presentation by Dr Penning from the EU Commission and representatives of EFSA.

This year's FEDIAF AGM will be held in Rome from the 21st – 22nd May, hosted by the Italian Pet Food Manufacturers' Association (ASSALCO).



FEDIAF (Federation Europeenne de L'Industrie des Aliments pour Animaux Familiars)

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The PFMA Annual Report is available to download from the PFMA website:
www.pfma.org.uk

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