

April 2007

Petfood Industry

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Organic & natural predictions

Bil-Jac Foods: The art of processing

Bob Kelly, left, and his father Bill Kelly of Bil-Jac Foods, p. 20

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71 million strong—and growing.



On the cover: Bob Kelly, left, and his father, Bill Kelly, of Bil-Jac Foods at their new corporate headquarters in Medina, Ohio, USA.

Photo by Anthony Gray
(www.agrayphoto.com).

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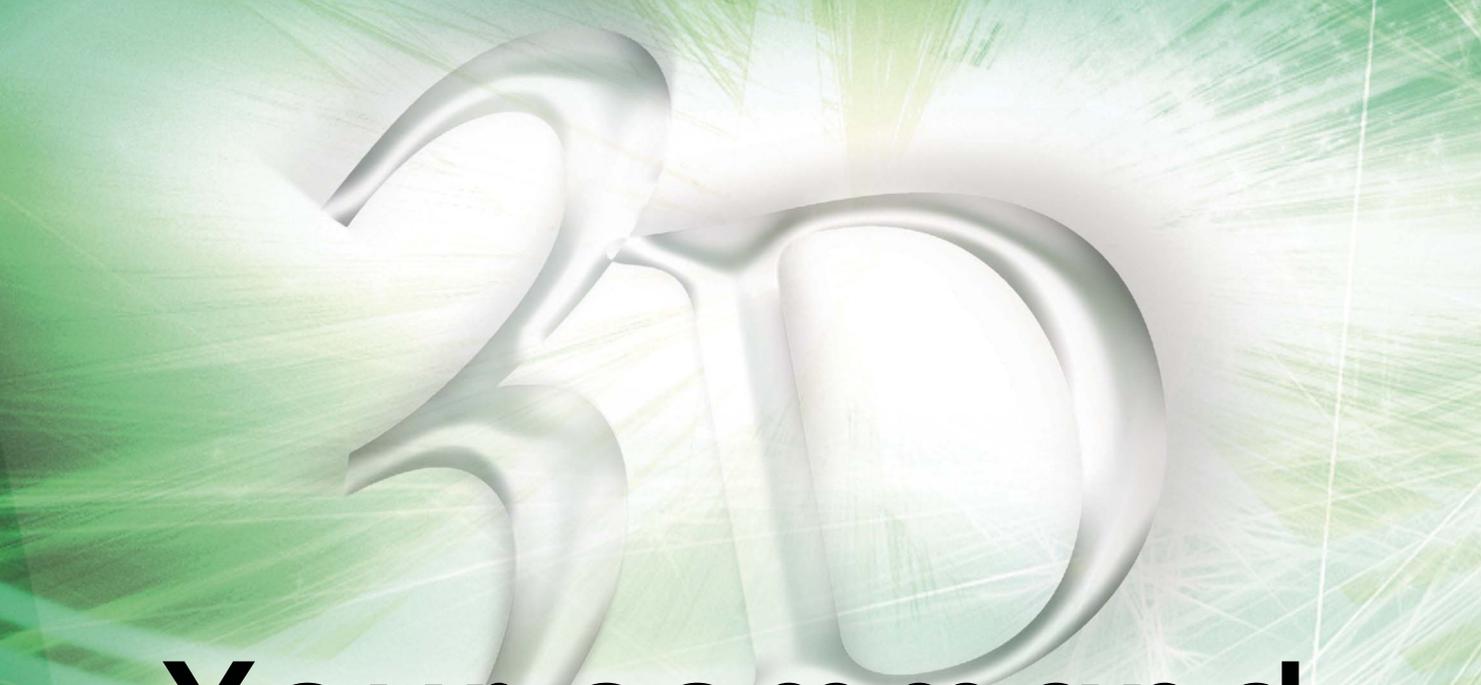
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Raw petfood: risky or right?

Is feeding pets raw foods too risky? On the other hand, is feeding typical commercial petfoods too risky? Following are both sides of this timely debate.

Feeding pets raw ground beef might not be the best idea, according to Robert Backus, assistant professor at the University of Missouri, at Columbia (AllAboutFeed.net, February 19, 2007). “We are experiencing a trend in the US where pet owners are feeding their pets raw meat because they think it is healthier, but that couldn’t be further from the truth,” says Backus, director of the Nestlé Purina Endowed Small Animal Nutrition Program.

“Feeding your pet raw meat puts the safety of not only the pet in danger, but also the household,” asserts Backus. Harmful bacteria, and other microbes and parasites, may live on raw meat, which is why he urges pet owners to be careful about how they handle it.

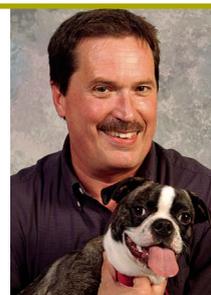
Additionally, says Backus, raw meat can affect the pet’s health. Animals that consume cooked or uncooked bones can experience tears anywhere along their digestive tracts from their mouths to their intestines. “Petfoods offer a safe alternative to raw meat diets,” concludes Backus.

FDA warning

In a February 13 press release, the US Food and Drug Administration (FDA) warns consumers not to purchase, or use, Wild Kitty Cat Food due to the presence of *Salmonella*. During routine monitoring activities, FDA collected and analyzed a sample of frozen raw Wild Kitty Cat Food and detected *Salmonella* in the product. Cats and other pets consuming this food may

It boils down to how much risk from what source.

— Tim Phillips



become infected with *Salmonella*. People can also become infected with *Salmonella* if they handle or ingest this cat food, touch pets that consumed the food or touch any surfaces that came into contact with the food or pets, according to the release.

In its response to the FDA warning, the Wild Kitty Cat Food company notes, “Since there is no ‘kill’ step (cooking or irradiation) in the production of any raw meat petfood, and none required by FDA or USDA, the consumer and pet will always have some risk of exposure to foodborne pathogens.” The response goes on to say, “We believe our extremely knowledgeable customers think the benefit of a raw diet outweighs the risk, are aware of this risk and follow the FDA-mandated sanitation and handling guidelines that are on the container of our cat food.”

The raw side

“A properly formulated raw diet is the most complete and balanced diet possible,” contends Dr. Ian Billinghurst, “because it supplies all essential nutrients that we know and *do not* know about.” He notes a raw diet has:

- Appropriate levels of sodium and potassium.
- The evolutionary form and balance of calcium and phosphorus.

- Enzymes and probiotics.
- Biologically appropriate antioxidants and other protective nutrients.
- No artificial chemicals, such as colorings, flavorings or preservatives.
- No added sugar, excessive salt, grains or fillers.
- No heat processing.

Says Billinghurst, “High-carbohydrate diets cause problems in people, dogs and cats such as obesity, hyperinsulinemia, insulin resistance, inflammation and hyperglycemia.” What’s more, he thinks biologically inappropriate diets could cause arthritis, diabetes, renal disease, autoimmune disease, epilepsy and cancer.

Life is risk

Sounds like the choice of raw or regular petfood boils down to how much risk from what source. Perhaps a logical compromise is to go the route Bil-Jac Foods has chosen (p. 20). “Bil-Jac is essentially a raw food that has been pasteurized and carefully dehydrated,” says Bil-Jac president Bob Kelly. ●

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

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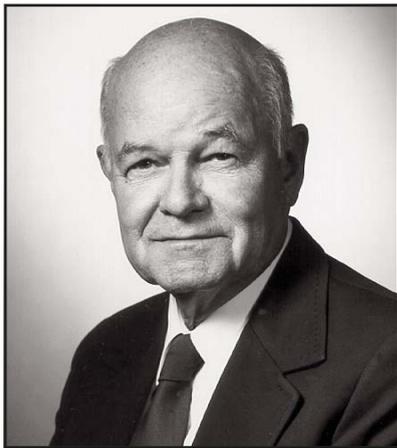
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Industry News



Passing of a petfood pioneer

Dr. James E. Corbin, an industry leader and pioneer, died March 1. He was born in 1921 in Providence, Kentucky, USA, and earned his bachelor's

and master's degrees at the University of Kentucky. He earned his doctorate at the University of Illinois. Corbin joined the Ralston Purina Co. as manager of special chows research in 1954 and became the first director of the Purina Pet Care Center. In 1973, he joined the Department of Animal Science at the University of Illinois and established a world-class teaching and research program in companion animal biology. He retired from the University in 1984 but was an active emeritus professor.

"Few persons have had greater impact on the petfood industry. Besides pioneering the concept of extruded petfood as an industry scientist, Jim's mentorship of literally hundreds of petfood professionals has helped make the industry the dynamic organization that it is today," said

colleague Dr. George Fahey.

A public memorial service honoring Corbin was held on March 31 at the College of Agricultural, Consumer and Environment Sciences (ACES) Library, Information and Alumni Center. A reception was planned to follow the service. A guestbook has been set up online by *The News-Gazette* for those interested in leaving or reading the comments about Dr. Corbin. Visit the guestbook at www.legacy.com/Link.asp?I=GB000086662741.

In recognition of his many contributions, a memorial scholarship fund has been established—the Dr. James E. Corbin Companion Animal Biology Scholarship—for students in the University of Illinois College of Agri-



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Menu Foods recalls wet food products

Menu Foods Inc. recently announced a precautionary recall of its “cuts in gravy” style dog and cat foods produced at two of its US facilities between December 3, 2006, and March 6, 2007. The products are sold in the United States, Canada and Mexico. The products are packaged in cans and pouches under numerous brand names and are marketed nationwide by many petfood retailers including Ahold USA Inc., Kroger Company, Safeway, Wal-Mart Stores Inc., PetSmart Inc. and Pet Valu Inc.

The recall was prompted by consumer complaints received by the manufacturer and by trials conducted by the manufacturer. There have been reported instances of cats and dogs in the US that developed kidney failure after eating the affected product. Ten deaths, one dog and nine cats, have been reported thus far. Shortly after receipt of the first complaint, Menu Foods initiated a substantial battery of technical tests, conducted by both internal and external specialists, but has failed to identify any issues with the products in question.

Menu Foods has listed all the potentially contaminated products online at www.menufoods.com/recall. The US Food and Drug Administration (FDA) is conducting an investigation and working with Menu Foods to ensure the effectiveness of the recall. Consumers who wish to report adverse actions or other problems can go to www.fda.gov/opacom/backgrounders/complain.html to contact the FDA complaint coordinator in their state.

Menu Foods discovered that timing of the production associated with the complaints coincides with the introduction of an ingredient from a new

supplier. The manufacturer stopped using this ingredient shortly after this discovery, and production since then has been undertaken using ingredients from another source. In addition to changing suppliers, Menu has increased testing of all raw materials and finished goods.

Menu estimates that based on currently available information, this recall could cost between US\$30 million and US\$40 million. Menu is continuing to produce product, utilizing a different supplier for the ingredient in question, to replenish its customers as quickly as possible.



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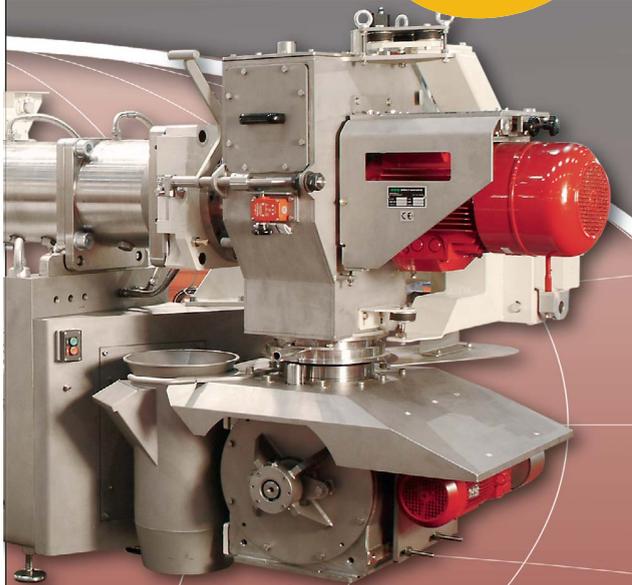
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Industry News >

Payne leaving PFI

Steve Payne, vice president of communications, is leaving the US Pet Food Institute (PFI) to become the vice president of corporate communications for Feld Entertainment, which manages Ringling Brothers and Barnum & Bailey Circus and other entertainment events, and is headquartered in the Washington, DC area. Kurt Gallagher will now become PFI's new director of communications and export development. He will be responsible for PFI's public affairs program. Gallagher was with PFI previously in an administrative role. He returns to PFI after handling communications and other projects for a large member association and an online company.



Kurt Gallagher

He will be responsible for PFI's public affairs program. Gallagher was with PFI previously in an administrative role. He returns to PFI after handling communications and other projects for a large member association and an online company.

Del Monte Foods profit declines in third quarter

Del Monte Foods Co. has reported a 10% decrease in third-quarter profit due to higher costs and a decline in sales volume. Del Monte posted a profit of US\$46.5 million for the third quarter, compared with US\$52 million for the same quarter a year ago. Sales increased by 15% in the third quarter, mainly due to its acquisition of petfood brands Meow Mix and Milk-Bone. Del Monte said growth from new products and net pricing also contributed to the 15% increase in total sales.

For the third quarter, pet products net sales increased by 56.7% to US\$356.2 million, from US\$227.3 million in the prior year period. Total sales in the third quarter were US\$907 million, up from US\$789.6 million during the same period in 2005. Growth from new pet products (including 9Lives Daily Essentials, Kibbles 'n Bits Brushing Bites and Pup-Peroni Ribs), a shift in promotional timing from fourth quarter fiscal 2007 to third quarter fiscal 2007 and net pricing also positively contributed to the increase in net sales.

For fiscal 2007, the company continues to expect sales growth of 12-15% over fiscal 2006 net sales of US\$3.0 billion. Fiscal 2007 net sales growth is expected to be driven primarily by the Meow Mix and Milk-Bone acquisitions.

Nestlé announces record sales figures

Nestlé SA reported that its sales amounted to a new high of US\$80.9 billion (CHF 98.5 billion) in 2006, up US\$5.99 billion (CHF 7.3 billion), or 8.1%. The single-most important factor in this increase was organic growth of 6.2%.

With sales of US\$9.4 billion (CHF 11.4 billion) in 2006, PetCare enjoyed 7.1% organic growth, with real internal growth of 4.3%, and doing well all over the world. In the premium segment, Dog and Puppy Chow together achieved US\$821.8 million (CHF 1 billion) in sales for the first time in 2006. The superpremium segments, with products such as Beneful and Pro Plan, are also developing well.

Webinar archive available online

A recorded version of the recent webinar, *Using non-traditional ingredients in unconventional petfoods*, is now available. Presented by *Petfood Industry* magazine and *Petfood Forum* 2007, and sponsored by Kemin, the webinar featured an in-depth discussion on the types of ingredients that are being used in the next generation of petfoods—including fresh/frozen meats, whole animal/bird parts, and fruits and vegetables.

Log in today to hear David Lummis, pet market analyst for *Packaged Facts*, and Dr. Greg Aldrich, *Pet Food & Ingredient Technology Inc.*, discuss this important topic. To view the recording of the presentation, go to www.ian.ibeam.com/events/watt001/21136.



Wild Kitty Cat Food found to have *Salmonella* contamination

The US Food and Drug Administration (FDA) recently informed consumers not to purchase or use Wild Kitty Cat

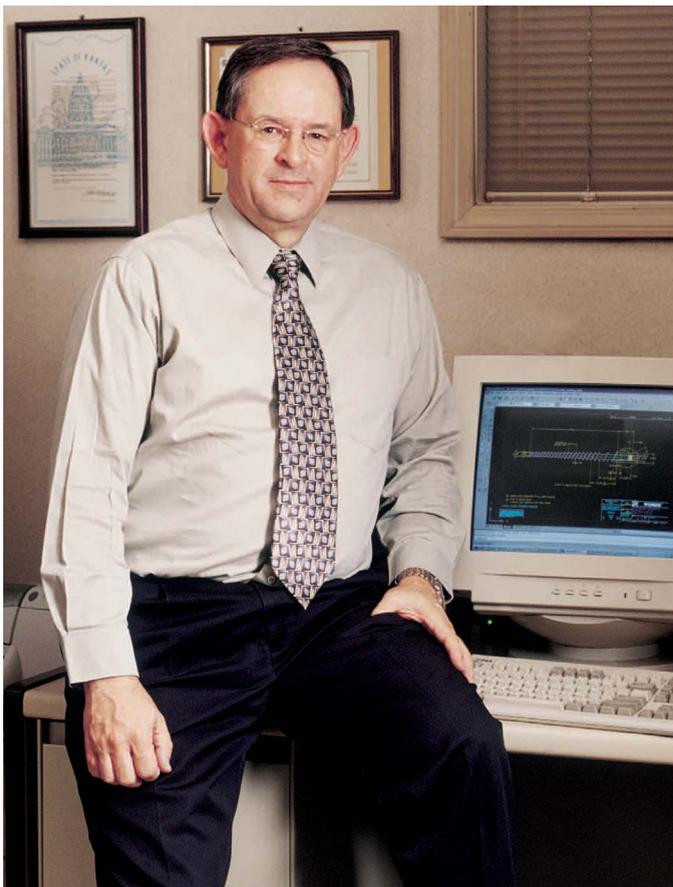
Food due to the presence of *Salmonella*, a bacterial pathogen. During routine monitoring activities, FDA collected and analyzed a sample of frozen raw Wild Kitty Cat Food and detected *Salmonella* in the product. The specific products covered by this warning are Wild Kitty Raw All Natural, Frozen Cat Food—Chicken with Clam Recipe, net weight 3.5 oz. (100g) and 1 lb. in plastic containers. FDA noted that some of these containers may be uncoded. The Wild Kitty Cat Food is sold nationwide to retail stores and through distributors and internet sales.

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These formulas include Labrador Retriever Formula; Yorkshire Terrier; German Shepherd Formula; Boxer Formula; and Dachshund Formula. In addition, the brand will soon offer a Custom Care line-up for dogs with special health concerns. Eukanuba Custom Care diets address key health issues such as weight loss, sensitive skin and stomach and joint care issues. Eukanuba's Customized Nutrition line-up includes Small Breed Formula; Medium Breed Formula; Large Breed Formula; Natural Lamb & Rice; and Premium Performance Formulas.

WWPIA launches website for pet-related info

The World Wide Pet Industry Association Inc. (WWPIA) has launched its new website—www.PetSource.org. PetSource.org aims to be the one-stop source for consumers, industry retailers and experts alike. Doug Poindexter, vice president, WWPIA, noted that PetSource.org will bridge the gap between consumer and industry expert.



The site will feature interactive tools, such as the national "Pet Store Locator," where retailers can upload information and promote their business to consumers and industry experts. Professional members will also have access to educational seminars, panel discussions, new product showcases and more. The site also offers pet owners a comprehensive directory of breeders, vets, rescue groups, pet products and other services.

Masterfoods Petcare plant opens in Australia

MasterFoods Petcare has added a production and petfood packaging plant in Wodonga, Victoria, Australia, that employs more than 700 people. The plant will reportedly manufacture a wide range of dog and cat food in single-serve packs with the capacity to produce more than 100 million units per year for both the Australian market and diverse export markets within the Asia Pacific region. The plant represents an investment of approximately US\$35 million, and will use the latest state-of-the-art robotics on product lines that can be changed rapidly, allowing maximum flexibility to meet customer demands.

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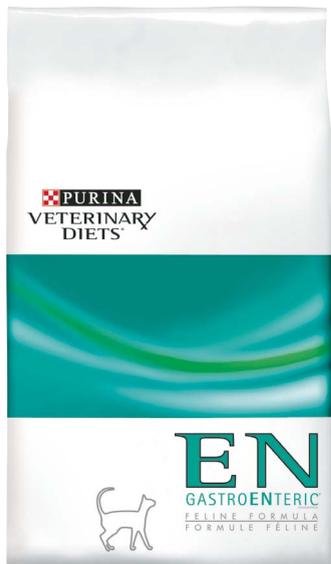
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Therapeutic diet for cats

Nestlé Purina has introduced a therapeutic diet for the management of cats with gastrointestinal problems utilizing a low-carbohydrate approach. New EN GastroENTERic brand feline formula dry cat food is formulated with a high fat content because, company literature states, cats with chronic diarrhea usually respond well to a higher fat intake. www.purinaveterinarydiets.com

Nutripet Chicken Meal and Rice formula

Quixtar's new Nutripet dog and cat foods offer complete nutrition for canine and feline "family members." The foods offer a holistic approach to the pet's overall well-being, according to Quixtar. Nutripet foods contain no by-products, wheat or soy. Highly digestible chicken meal, rice and oatmeal along with added *L. acidophilus* support digestion and nutrient absorption. www.quixtar.com



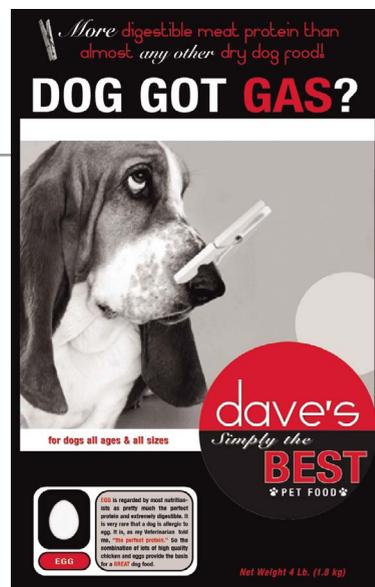
The Goodlife Recipe

A recently founded division of Mars Inc., the Goodlife Recipe Pet Care Co., has launched its line of dog and cat food and treat products. The Goodlife Recipe food for cats and dogs was developed with high-quality ingredients and a blend of natural flavors, according to the company. The Goodlife Recipe brand is expected to be in full distribution by mid-March at supermarkets, mass merchandise stores and specialty pet stores. www.goodliferecipe.com

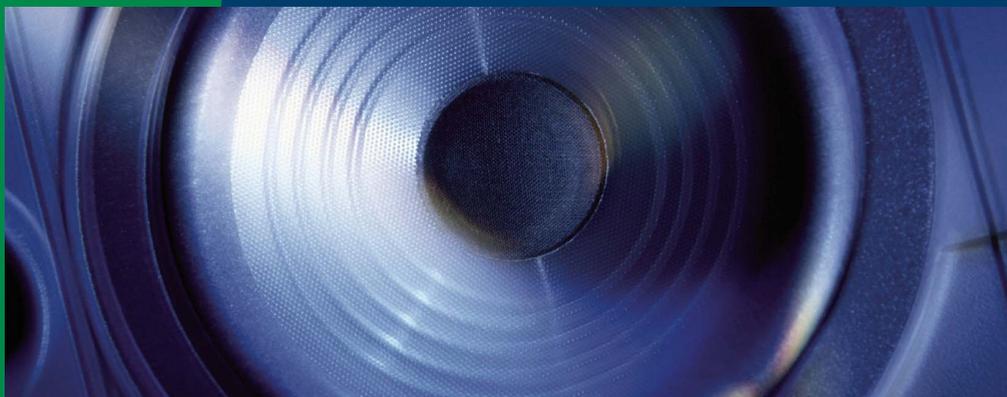


Dog got gas?

Dave's Simply the Best has let loose with a clever marketing campaign to get consumers' attention, while aiming to alleviate a common pet owner complaint—gas. According to Dave's, its Simply the Best new dog food product contains about 75% animal source protein, and on average it is about 85% digestible. Ingredients such as egg, chicken and rice are included in the highly digestible formulation. www.davespetproducts.com



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Bil-Jac products are slender pellets that are much easier to dry than typical extruded petfoods.



Bil-Jac starts with fresh, chilled chicken and uses a unique low-temperature vacuum processing system

The art of processing

BY TIM PHILLIPS, DVM

Talk about being ahead of your time. Bil-Jac Foods has made frozen dog food since 1947. And, since the mid-1980s, the company Bill and Jack Kelly founded has made dry petfoods with a unique processing system. A system that does not use extrusion. “It costs substantially more than typical dry petfood processing systems,” says Bil-Jac president Bob Kelly, “but it is crucial to Bil-Jac’s success—it is really more of an art than a process.”

What is unique?

“No one comes close to making petfood the way we do,” contends Kelly. How is Bil-Jac’s processing unique? Let us count the ways:

1. Fresh chicken. Bil-Jac works closely with name-brand chicken processors and has control of the chicken from the time it is processed. The chicken ingredients are chilled immediately to maintain quality, and within hours

Business basics

Corporate headquarters: Medina, Ohio, USA

Annual sales: Bil-Jac is growing at a double-digit percentage rate per year. The company is privately held, total sales are not disclosed.

Manufacturing: Bil-Jac frozen is manufactured in Medina, Ohio, USA; Bil-Jac dry products are manufactured in Berlin, Maryland, USA. In addition, there are distribution centers in Tulsa, Oklahoma; Marietta, Georgia; Gardner, Massachusetts; Charlotte, North Carolina; and Dallas, Texas, USA.

Brands: Bil-Jac Dog Food (dry); Bil-Jac Frozen Dog Food; Bil-Jac Cat Food (dry); and Bil-Jac Pet Treats (for both dogs and cats).

Officers: William Kelly, chairman of the board; Robert Kelly, president; James and Ray Kelly are both executive vice presidents.

Exports: Bil-Jac exports its dry foods to Japan, Canada, Chile, Korea and Malaysia, with many other export opportunities pending.

Website: www.biljac.com.



Bill Kelly in front of the first delivery truck circa 1951, delivering the company's first product, Bil-Jac Frozen dog food.



Bill Kelly and his three sons, pictured from the left: Bob, Bill, Ray and Jim Kelly.

they are in a bag of Bil-Jac petfood. Most petfood companies rely on rendered chicken meals, processed at 280-300°F, for their primary protein source.

2. Low-temperature, vacuum processing. Bil-Jac products are first pasteurized at about 200°F to destroy harmful bacteria. Then, vacuum processing brings the boiling point of water down to 165°F (versus 212°F at normal atmospheric conditions). During processing at these lower temperatures, the amino acids in the protein are not overheated. The result: Protein denaturation is greatly decreased. Notes Kelly, "Bil-Jac is essentially a raw food that has been pasteurized and carefully dehydrated."

3. Starches cooked separately. Bil-Jac starches undergo a separate, slow-cooking process to make the carbohydrates more digestible—around 99%. "Most petfoods have carbohydrate digestibilities in the 75-90% range," says Kelly. "Sometimes people think their pet is allergic to certain grains, but what they may actually be reacting to is the way the grain is processed."

4. No added fat. The typical rendering process melts off much of the fat. The majority of petfood manufacturers then spray this rendered fat back on the extruded kibble to make it palatable. Bil-Jac does not add fat. Kelly points out, "The fat that occurs naturally in fresh chicken is preserved, retaining the nutrients necessary for a healthy skin and coat."

5. Low-temperature drying. After vacuum dehydration, Bil-Jac is made

"Word of mouth is sometimes better than going out and touting yourself."

into slender pellets that are easier to dry than the typical extruded chunks that are larger and crusted. Because these pellets are so slender, the final drying is accomplished at a much lower temperature, which enhances protein digestibility.

The Bil-Jac challenge

"A big part of what most petfood companies put into a marketing budget goes into processing at Bil-Jac," states Kelly. He acknowledges Bil-Jac doesn't spend a lot of money on advertising and promoting its products. "Word of mouth is sometimes better than going out and touting yourself," he says.

Getting breeders, show enthusiasts, pet owners and pet retailers to spread the word about Bil-Jac is of utmost importance. One way Kelly says the company achieves this goal is by getting potential customers to put Bil-Jac products to the test. "We want them to comparison feed; we want everyone to take the Bil-Jac challenge," he says.

Amino acids make life

Here's a phrase from biochemistry: "DNA makes RNA makes protein makes life." Since proteins are made from amino acids, it follows that amino acids make life. This concept runs deep at Bil-Jac. It is why the company uses fresh-chilled chicken ingredients and low-temperature cooking and drying.

The genetic information in DNA is stored as a sequence of nucleotides—the order of which determines the information. When a gene is activated, the DNA strands separate and one of them serves as a template for copying a messenger RNA (mRNA).

The mRNA, containing the information for a particular protein, is transported from the nucleus to the cytoplasm, where protein synthesis takes place. Amino acids are joined together as pearls on a string.

There are numerous amino acids, some of which are very susceptible to high heat damage. Their order in the protein molecule determines its structure and function. Proteins may serve as enzymes, hormones or structural components of a cell. The final protein molecule may consist of several hundred amino acids linked together according to the instructions encoded in the mRNA.

The challenge procedure is simple: “Take a bowl of Bil-Jac food and, at a regular feeding time, place it next to a bowl of the pet’s usual food,” Kelly suggests. “Then let your pet decide.”

Time travel

Let’s go back to what became the future. Bill and Jack Kelly grew up on a fox farm. After serving in World War II, they returned to their hometown of Medina, Ohio, USA. They advanced the experience they had formulating fox food into making dog foods. “Their products filled a nutritional gap in the dog food market,” says Kelly.

For 40 years, Bil-Jac was only available as a frozen product. In the 1970s, Bill was fielding questions from customers regarding dry dog foods. “People always asked my dad why he didn’t have a dry dog food, and I heard his answer many, many times,” Kelly says. “He said he wasn’t going to make a dry food until he was confident that he could present his customers with a

product of the same quality as his frozen foods.”

Over a 10-year period, the Kellys tested and developed a low-temperature, vacuum-drying process by which moisture could be eliminated from meat products without sacrificing nutritional value. With this new technology perfected, Bil-Jac released its line of dry petfoods.

Staying awake

Bil-Jac’s biggest opportunity: “A lot of people don’t yet understand the difference between Bil-Jac and other petfoods,” says Kelly. “We want trial.” I ask him about what keeps him awake at nights. He says, “The excitement about how we’re growing.” Not a bad way to stay awake. ●



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GUIDE Petfood Forum Europe 2007

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Petfood Forum Europe 2007 is a unique event and the meeting place for European petfood professionals. It is an opportunity to learn, network and visit with suppliers. The symposium lectures are scheduled for May 8, 2007, at Jaarbeurs Halls, Utrecht, Netherlands, in association with Victam International.

At Victam Utrecht, you'll have the chance to visit many feed and petfood industry suppliers (equipment and ingredients). For a free online registration to the Victam exhibition, go to www.victam.com/international.php. Also at this site, you can find several hotel options.

Jaarbeurs Utrecht is easily accessible by train and car. There is a direct train from Schiphol Airport in Amsterdam to Utrecht, which stops just a short walk away from Jaabeurs. For cars, there are 5,800 parking places. The Jaarbeurs facility has several restaurants, the Beatrix Theater and the Holland Casino.

Following is the most accurate and up-to-date scheduling, topic and speaker information available at press time. For regular updates, bookmark www.wattnet.com/petfoodforum. If you have specific questions, contact Marcia Riddle (attendees) at E-mail: mriddle@wattnet.net; Tel: +1.815.734.5633.

Tuesday, May 8

10:00—10:40

Nutrition and longevity

Anton C. Beynen, PhD, from Utrecht University, Faculty of Veterinary Medicine, explains that caloric restriction may increase the quality and length of life in dogs. Furthermore, he covers how diet composition may decrease the signs of aging. For example, increasing vitamin E intake and lowering phosphorus intake may help.

10:40—11:20

Niche markets

Lee Linthicum, who manages the research program for the global pet care products industry at Euromonitor International, provides insight into trends driving niche market

opportunities. These trends include foods reflecting increased consumer awareness of pet health, functional offerings and ultra-premium products.

11:20—12:00

Regulations update



Thomas Meyer, secretary general of FEDIAF, the European petfood manufacturers trade association, discusses three major European Union (EU) regulations in the pipeline:

- ▶ The ongoing review of the animal by-products regulation;
- ▶ The complete revision of the labeling and claims rules; and
- ▶ New rules for the re-authorization



Petfood Forum Europe 2007 is an opportunity to learn, network and visit with suppliers.

of all existing petfood additives.

He also looks at efforts aimed at self-regulation, such as FEDIAF's *Guide to Good Practice on the Manufacture of Safe Pet Foods*—which received EU approval in 2007.

13:30—14:10

Advances in palatability testing

Martin Hoogewaard from Morgenstond Kennels focuses on what is new in the world of dog and cat palatability testing.

14:10—14:50

Global petfood market trends through 2012



David Lummis from Packaged Facts shares exclusive, primary research surveying hundreds of pet industry executives from around the world, with a focus on Europe. Key topics include globalization, cultural shifts, human population shifts, marketer shifts, product pricing factors, new product trends and the role of the Internet.

15:30—16:10

Production innovations



Galen Rokej, process manager at Wenger Manufacturing Inc., discusses improving energy efficiency and reducing recipe costs. In addition, he'll cover driving product properties via:

- Control of product density;
- Adjustment of SME inputs (specific mechanical energy); and
- Retention time control.

16:10—16:50

New and functional ingredients



John Lowe, PhD, Tuttons Hill Nutrition, looks at a range of ingredients from prebiotics through novel plant and animal products. He discusses handling, nutritional functionality and stability issues associated with these novel ingredients.



At Victam Utrecht, you'll have the chance to visit many feed and petfood industry suppliers (equipment and ingredients).

Petfood exhibitors at Victam International 2007

This year's Victam International, May 8-10, Utrecht, Netherlands, will be the 16th in a series that started in 1965, but the first to have a focus on petfoods alongside the event's regular theme of animal feed manufacturing. Besides Petfood Forum Europe, companies offering machinery, ingredients and control/QC systems for manufacturers of dry petfoods will be among the more than 350 exhibitors displaying their products and services. At press time, the following petfood-related companies were registered as Victam exhibitors. For an updated list, visit www.victam.com/international.php. Names in yellow and bold indicate advertisers in this issue.

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Actemium	Netherlands	Celsius	Netherlands
Adifo.....	Belgium	Cetec Industrie	France
Aeroglide Corp., p. 32	United Kingdom	Chemoforma	Switzerland
Aerox Verder	Netherlands	Chief Industries UK	United Kingdom
Agromatic	Switzerland	Chronos Richardson	United Kingdom
Airconveyors International	Netherlands	Cima Nutrition	Belgium
Akzo Nobel Surface Chemistry	Sweden	Cimbria	Denmark
Almex BV, p. 37	Netherlands	Cletral	France
Amandus Kahl	Germany	Compound Feed Engineering	Ireland
Andritz Sprout, p. 12	Denmark	Concetti	Italy
Anitox	United Kingdom	Conforma Clad	USA
Applied Plasma Physics	Norway	CPM/Europe, p. 26	Netherlands
Arodo	Belgium	Crowley Engineering	Ireland
Ausloos Verpakkingstechniek	Belgium	Cusinato Giovanni	Italy
Bakker Magnetics	Netherlands	Danvaegt	Denmark
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Brabant van Opstal	Netherlands	Dinnissen BV, p. 13	Netherlands
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Organic & natural predictions

Industry segments look at the future of this hot category

BY JENNY KVAMME, DVM

The hottest trends in petfood these days are “natural” and “organic.” As pet owners are trying to eat healthier, their interest in these types of products for their pets continues to grow. In fact, sales of natural and organic petfoods are expected to outpace those in the overall petfood market soon.

This can be seen on the shelves, as 674 new SKUs tagged “natural” were brought to the US market in 2006, compared with 535 in 2005; while the number of “organic” SKUs rose from 62 in 2005 to 243 this past year (see Figure 1, p. 32).

Getting in the game

According to David Lummis, senior pet market analyst with Packaged Facts, sales of natural petfood in 2005 reached US\$520 million, and estimated sales for 2010 is US\$1.042 billion, with the organic segment approaching US\$100 million. This reflects compound annual growth rates of 15% and 25%, respectively. While much of this activity will remain centered among smaller marketers in the pet specialty channel, Lummis expects major mass marketers will also be firmly entrenched in natu-

ral/organic petfood within the next two years. Packaged Facts also expects to see leading natural petfood marketer Nutro Products primped up for sale to a major player in the market, with Mars as the top prospect.

Lummis notes that most of the new product activity in natural—and all of the activity in organic—continues to come from smaller marketers serving the pet specialty channel such as Castor & Pollux, Evanger’s and PetGuard. For more information, Packaged Facts offers several reports on the natural petfood market including *Natural, Organic and Pet Products*, which will be available in September.

Private label segment

AnimalPharm (January 2007) recently referenced a study by the Private Label Manufacturers Association (PLMA) which shows that US consumers are purchasing private label products in US supermarkets, drug stores and mass merchandisers in ever greater numbers. According to this article, almost half of the respondents in the PLMA survey said that up to a quarter of all food they bought was private la-



bel, while a fifth said that at least half of all items they bought were private label. The article also revealed that because of the popularity of private label, mass merchandisers are expanding into channels beyond the usual food stores.

The private label market captured a 17% share of the global market last year and is still growing. In the global private label petfood market in particular, growth was 11% (US\$978 million in 2005). In terms of percentage

Sales of natural petfood reached US\$520 million in 2005.



share, petfood ranked fourth at around 21%. This raises the question: What are private label petfoods doing to bring about such growth in this segment of the retail industry?

One way is to start producing premium-quality private label brand petfood products. According to Steve Rubow, a regular contributor/columnist for *Private Label Magazine*, "There is evidence of greater doting on pets with the advent of such things as pet insurance, gourmet foods, stylish clothing, etc. Retailers are not a group to invest very long in new items that don't sell, and we're seeing much more attention given to premium private label products (i.e., Ol' Roy Chicken Strips, Wegmann's Bruiser line, Safeway Select products) being brought into petfood."

Rubow also notes that future trends in private label brands will be led by retailers such as PetSmart. "They are a true innovator for petfoods and products and are a big player in private brands. Food stores can't go to the same extreme, but they watch PetSmart," he said.

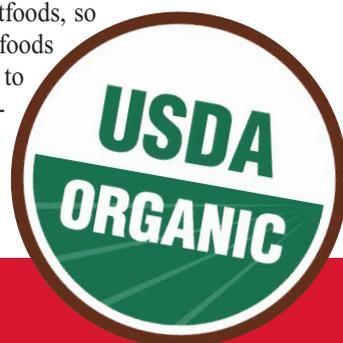
Organic trends

In the organic arena, petfood manufacturers are beginning to see the merits of branching out into this hot category.

According to the Organic Trade Association's 2006 Manufacturer Survey, organic petfood sales grew 40% to reach US\$46 million (representing 0.19% of all US petfood sales) in 2005. Barbara Haumann, OTA press secretary, notes that the survey projects that sales of organic petfoods are expected to grow by about 36% in 2006—and by at least 24% each year for 2007 through 2010.

As more companies embrace the notion of manufacturing organic products, issues regarding proper production practices come to the forefront. "There definitely is a growth in interest in certification," says Jessica Walden, a technical specialist with Quality Assurance International Inc. Currently, the organic regulation under USDA's National Organic Program (NOP) does not cover the manufacturing of organic petfood products, which has caused some frustration in the petfood industry. This is because certifiers have had to certify petfood products to the organic handling requirements for human food. However, growing interest has inspired the NOP and the National Organic Standards Board to set up a Pet Food Task Force.

The task force has addressed this issue by acknowledging the existing regulations for petfoods, so organic petfoods will be able to compete equitably with the rest of the non-



Organic petfood certification basics

The certification process begins by requesting a certification packet from the chosen certification agency. The application packet includes an organic plan questionnaire and resources such as sample recordkeeping forms, materials guidance documents, a certification program manual and educational materials. Certifiers will conduct an initial review of organic plan documents to determine apparent compliance and to clarify any preliminary concerns.

The organic plan materials then go to an organic inspector, who schedules an on-site inspection, from which a report is generated. The report, organic plan documents and often additional post-inspection communications are used to make the certification decision. The entire process

can take several months.

Sometimes this can be expedited, depending on inspector availability, geographical logistics and the operator's ability to be prepared for inspection. Most certifier fee schedules are dependent on the scope and complexity of the certification, and/or the size or projected product volume of the organic operation. Submission of organic plan information and fees, and on-site inspection, are required annually.

Additional information is available at www.ams.usda.gov/nop, which includes a list of accredited certifying agents worldwide. Individual certification agencies should be able to answer your specific certification questions.



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organic industry. The *Interim Report* of the NOP Organic Pet Food Task Force is available at www.ams.usda.gov/nosb/meetings/orgpetfood.pdf. Until the recommendations by the task force have been adopted by the NOP, and made regulation, organic petfood products can only be certified to the existing

NOP regulation.

According to Walden, the biggest challenge for manufacturers is being able to devise a formulation that meets current organic regulations. Other challenges are ensuring that organic ingredients maintain their organic integrity from the moment they arrive until they

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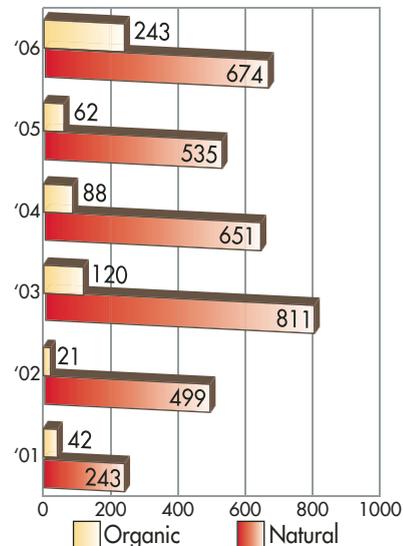


Figure 1. New US natural/organic petfood SKUs, 2001-2006. Source: Packaged Facts August 2006 report: *Pet Food in the US*. Figures reflect Datamonitor's Productscan Online data.

are made into the finished product and are distributed.

Currently, the scope of the NOP does not cover petfoods. So, petfoods can make an “organic” claim without being certified. Walden notes, “Certification gives the consumer the assurance that the organic claim is a truthful one. Once the regulation is adopted by the NOP, the certification of organic petfoods will no doubt explode, because the demand is endless.” ●

Sources include:

- ▶ **David Lummis**, senior pet market analyst, Packaged Facts (www.marketresearch.com).
- ▶ **Steve Rubow**, *Private Label Magazine* contributor/columnist and consultant with Leo J. Shapiro & Associates (www.ljs.com).
- ▶ **Barbara Haumann**, press secretary, the Organic Trade Association (www.ota.com).
- ▶ **Jessica Walden**, technical specialist with Quality Assurance International, Inc. (www.qai-inc.com).
- ▶ **Stephen Walker**, certification program manager, Midwest Organic Services Association (www.mosaorganic.org).

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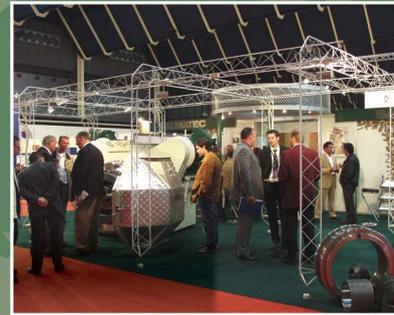


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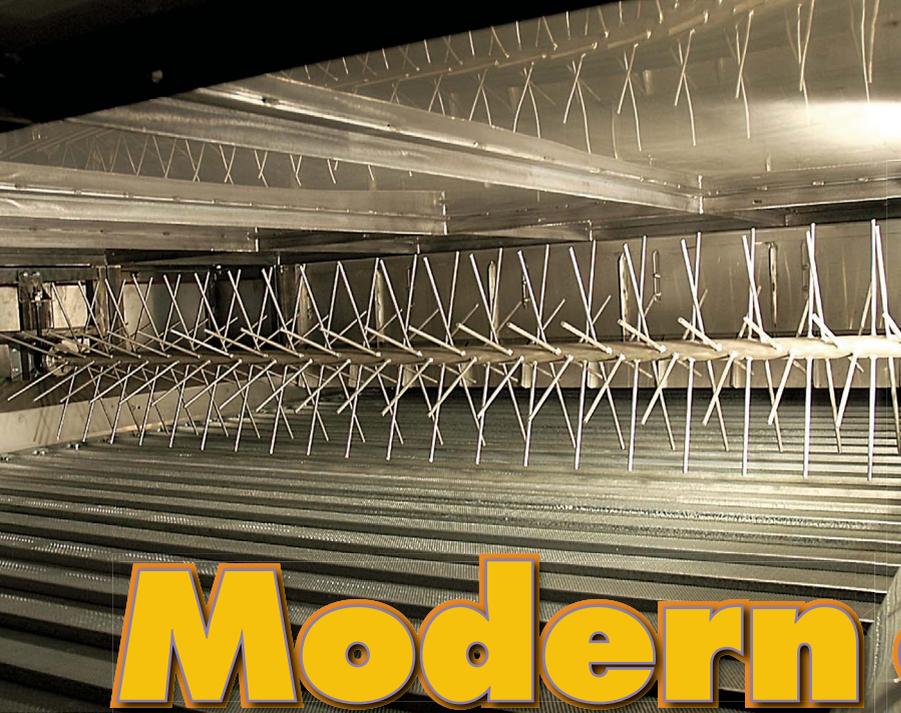
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Specific processing line improvements and procedures can significantly reduce cross-contamination.

Modern equipment



New technologies can reduce energy costs, make products safer and improve nutritional value

BY HENK VAN DE BUNT

Many factors are increasing demands on petfood producers: changing market conditions, more rigorous product specifications and operating requirements, added regulations and intensified competition. Fortunately, new technologies can improve plant performance by:

- ▶ Reducing costs;
- ▶ Reducing downtime as a result of longer machine life, longer maintenance intervals and improved operational safety.
- ▶ More easily producing high-quality and safe products.

Many petfood enterprises increasingly recognize that the use of modern equipment improves profits. Victam International 2007 is a good place to learn about new technologies for petfood processing. It will take place in Utrecht, the Netherlands, from May 8-10, 2007 (www.victam.com). In conjunction with this year's Victam, Petfood Forum Europe will be held on May 8, 2007 (www.wattnet.com/petfoodforum).

Reducing energy consumption

An effective means of cost reduction is to lower energy consumption—which also lessens the environmental impact. Big price increases in the last two years and a general fuel shortage suggest high costs can be expected to continue for the energy-intensive petfood plants. In some countries, higher taxation for energy-intensive industries will also impact the bottom line.

Because of relatively low energy costs in past decades, many petfood plants need to catch up with operational investments that can help offset increased energy costs. In particular, modern air-pressure systems, frequency-controlled electric motors and reduced steam production can help reduce energy use. Seemingly small measures should not be overlooked; they add up quickly. An example is the use of energy-saving lamps that can lead to a noticeable reduction in costs.

Greater savings should always be sought with the desired particle size re-

duction and raw material characteristics in mind. Besides familiar measures for saving thermal energy, new concepts have been developed to recover thermal energy from dryers and coolers. These systems can sometimes be combined with a closed exhaust air circuit with an integrated odor reduction system. Electrical consumption can also be lowered significantly by suitable conveying solutions. The same goes for the selection of the most suitable particle-size reduction or a combination of particle-size reduction systems.

Preventing cross-contamination

A significant trend in petfood processing is just-in-time production in multi-product plants. The increased number of recipes creates logistic and technological challenges in the production process. The frequent product changes necessitated by the variety of formulations increase the risk of carry-over of essential micro-ingredients and therefore cross-contamination becomes problematic. Older plants are often unable to meet the greater flexibility and safety demanded for accuracy.

Specific processing line improvements and procedures can significantly reduce cross-contamination. Elevator boots that require minimal cleaning, the substitution of screw conveyors, shorter conveying distances, correct dimensioning of pneumatic conveyor systems and complete-emptying mixers are some

improves profits



important measures that can considerably reduce cross-contamination.

End-of-line ingredient additions

Ingredient additions at the end of the process, by bulk blending or post-extrusion applications, offer several

Many petfood plants need to catch up with operational investments that can help offset increased energy costs.

advantages. End-of-line ingredient addition can overcome some of the disadvantages of just-in-time production by minimizing:

- Complex logistics—which are susceptible to mistakes;
- Increased wear and power demand by frequent starting and stopping of machines; and
- Damage to sensitive additives (e.g. enzymes, probiotics and vitamins).

The range of different application possibilities provides improved accuracy and greater flexibility in production planning.

Hygienic plant designs

Excellent product safety is now a basic requirement of petfood production. Special consideration must be given to eliminating bacteria, pathogenic germs and mold and to preventing contamination and recontamination. Interesting concepts have been created by machine and plant builders specifically for this purpose: applying hygienic design principles at the concept stage of equipment and devices, creating defined treatment conditions and avoiding germ-laden cooling air.

The traceability, demanded by legislation in some countries, for all raw materials coming into a petfood plant and for finished products is clearly simplified by modern information technol-

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ogy systems. These systems also create the transparency in the supply chain required by some legislation.

Reliable sampling

It is highly beneficial to control product quality and safety during processing. A condition for this is reliable sampling

procedures in the receiving area, as well as in the production area that guarantees representative samples are taken. Because sampling is the basis for further investigation, for negotiation with trading partners and for traceability, sources of error should be minimized as much as possible.

Petfood plants are increasingly using

automatic or semi-automatic sampling equipment in the receiving area and in processing. In addition, a huge number of possibilities exist for obtaining essential information about the composition, structure and moisture content of mixes and single ingredients by quick analysis. Meanwhile, on-line NIR systems are used in petfood plants for controlling the moisture levels and/or for determining essential ingredients.

Preventing dust explosions

In these intensely competitive times, minimizing downtime through the application of modern technology takes on even greater importance. The European Union ATEX Directive (from the French "ATmospheres EXplosibles") aims to prevent potentially explosive concentrations of gas, vapor, mist or dust in the air. Zones as designated by ATEX categories must be followed for devices and protective systems according to the law. Moderate investment can lead to improved operational safety that meets both legal and insurance requirements. Examples include modified aspiration designs, metal separation before critical elevators and applying certain minimum standards for conveyors, sifters and storage.

Improved products

Adding value entails improvements to products' physical characteristics and nutritional value. Detailed targeted improvements are often necessary. Research indicates that vacuum technology can raise product fat content and reduce product abrasion. The result is a new product that can provide competitive advantages.

Modern technology improves efficiency and reduces risk. Whether the investments required are worthwhile can only be determined by weighing the predicted benefits against the costs. ●

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Viewing the archive is FREE, however registration is required. View the recorded webinar over the Internet — a high-speed Internet connection, such as cable modem or DSL, is required.

Using non-traditional ingredients in unconventional petfoods

Fresh, real, meat, holistic, and raw are all terms used in profusion to describe the many new products emerging onto the scene in the petfood aisle. These are all a part of the movement underfoot in the petfood industry to create more humanized foods that use meaningful language to consumers and take advantage of new approaches to dog and cat nutrition.

Join pet market analyst, David Lummis of Packaged Facts and consultant, Dr. Greg Aldrich from the Pet Food & Ingredient Technology, Inc. for a discussion on the types of ingredients that are being used in the next generation of petfoods. These ingredients include fresh/frozen meats, whole animal/bird parts, and fruits and vegetables.

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Speakers



DAVID LUMMIS
PET MARKET ANALYST,
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CONSULTANT,
PET FOOD & INGREDIENT
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Biofuel co-products: do they have a place in petfoods?

The development of alternatives to fossil fuels in meeting the United States' energy needs truly is a commendable goal. Both biodiesel and ethanol have great potential in this regard, and the energy industry is rapidly expanding production of both products. However, this increased production is accompanied by the increased generation of co-products.

An oversupply of potential feed ingredients such as glycerin and distillers grains is anticipated in coming years, resulting in lower costs of these ingredients as well. To address what this may mean for the animal feed and petfood industries, the Association of American Feed Control Officials (AAFCO) held a special session entitled "Fitting Biofuel Co-products Into Feed: Symposium on Process, Definition & Utility" at its January midyear meeting in Savannah, Georgia, USA.

Glycerin

Contrary to the assumptions of some, biodiesel is more than simply filling your gas tank with spent French fry oil. Rather, it is produced by breaking up the triglycerides in fats and oils with an alcohol such as methanol. This reaction results in the formation of fatty acid methyl esters, which becomes the biodiesel fuel. The co-product of this reaction is glycerol (or glycerin). For every triglyceride molecule, three molecules of fatty acid esters and one molecule of glycerin is produced.

That glycerin has to go somewhere. Potential destinations include use as fuel, in de-icers and dust control agents, as a substrate for fermentation and for synthesis of chemical compounds such

An oversupply of potential feed ingredients is anticipated. — David Dzanis



as propylene glycol. However, it also has significant potential for use in feed.

Glycerin is presently AAFCO-defined and codified as generally recognized as safe (GRAS) for use in animal feed (including petfood) in Food and Drug Administration (FDA) regulations. As reported by some of the presenters at the symposium, it has good energy value (equivalent to corn, better than molasses), is water soluble, has a pleasant odor and sweet taste. Its inclusion in feeds can also have preservative properties while helping the product retain moisture. Recommended inclusion rates in feed range from 5-20% depending on intended species. Use in petfoods specifically isn't mentioned, though.

Distillers grains

When fermented, one bushel of corn (54 pounds) yields about 2.6 gallons of ethanol fuel. However, a sizable portion of the corn is not fermentable. About one-third (17 pounds) of that same bushel ends up as "distillers dried grains with solubles" (DDGS). Again, that material has to go somewhere.

Distillers grains are also AAFCO-defined and have long been used as a good source of energy and protein in animal feed. In fact, presenters reported

that this co-product is better than that derived from fermentation to produce potable alcohol and exceeds existing National Research Council (NRC) data for nutritive value. For example, the estimated metabolizable energy value of DDGS from fuel ethanol production for swine is 3828 kcal/kg, while NRC reports only 3032 kcal/kg. In addition to DDGS, there are other potential co-products that may be suitable for use in feed. For example, corn germ removed from the corn "up front" (prior to fermentation) is higher in protein and amino acids while lower in fat.

Regulatory concerns

While data to demonstrate the potential use of these co-products in feed appear promising, FDA still has some significant issues with feed ingredients derived from fuel production versus traditional sources. For example, while glycerin is codified as GRAS, there is still question as to whether glycerin from this source would meet the Food Chemicals Codex or United States Pharmacopeia standards. FDA is also concerned about potential residues in glycerin from production of biodiesel, especially methanol residues. While there is precedent for establishing limits on methanol residues for feed ingredients in the FDA regulations, the concentrations of methanol in

glycerin most often would be higher than previously allowed.

With respect to distillers grains, FDA is concerned about the types and amounts of antibiotics used in the fermentation process for fuel ethanol production and the potential for residues to form toxic metabolites or create antibiotic resistant strains of microorganisms. Another potential issue is the fact that any mycotoxins that may be in the corn become concentrated in the DDGS portion. FDA is also concerned about the use of "next generation" grains, yeasts and enzymes in the production of fuel ethanol that might not be acceptable for use in feed and the potential effects of processing aids like defoamers.

Future in petfoods?

As I understand it, industry is responding to FDA concerns with submission of safety data. Assuming the regulatory issues can be successfully addressed, what does the anticipated market glut of glycerin and distillers grains mean for the petfood industry? Glycerin is often used in soft-moist petfoods as a humectant. Its popularity for this purpose increased when regulations prohibiting use of propylene glycol in cat food were enacted in the mid-1990s. While soft-moist foods are not as popular on the market as they once were, perhaps a readily available, less-expensive source of glycerin will prompt new growth in this category.

Glycerin is often used in soft-moist petfoods as a humectant.

Distillers grains have never been extremely popular for use in petfoods, but there's no compelling reason why they can't be used for that purpose. Perhaps the unappealing character of the ingredient name has hindered use. Regardless, maybe the economic, plentiful source that's predicted to be available in the near future as a result of in-

creased ethanol production will spark new interest in this ingredient.

Copies of the slides used in the symposium presentations were not available on the AAFCO website (www.aafo.org) at the time of this writing. For those interested, they may be posted by the time this appears in print. ●

Dr. Dzanis is a writer and independent consultant for the petfood and animal feed industries on matters related to 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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Mars' response to opportunity

The US petfood industry is one of the few parts of the US food industry undergoing sustained growth. The US petfood, supplies and services market was valued at US\$38.4 billion in 2006 and has experienced 12% inflation-adjusted growth between 1998 and 2003. Growth continues, with a 3.4% inflation-adjusted increase in sales mainly attributed to sales growth from pet owners' increasing demand for premium products.

The key market drivers continue to be humanization of pets and the impact it has on consumer lifestyles. According to one survey, 83% of pet owners call themselves "mommy" or "daddy," and 59% celebrate their pet's birthday (Mintel). Now we see this attitude has strengthened, at least in terms of money spent on food with quality ingredients, healthy snacks, services and health care.

With rampant discounting and shrinking margins, there is also an increased focus on health and quality. Pet product marketers are charting new courses of growth via premium and natural products—including organic and eco-friendly items—which are at the center of the new product explosion. As a result, manufacturers have been able to compete more on the quality, taste and function of food—rather than putting primary emphasis on a low price.

The Goodlife Recipe

A case in point is Mars PetCare US, which has launched a high-end petfood brand called the Goodlife Recipe. Marketing for the brand plays up its premium ingredients and mainstream price.

On the brand's website (www.

Pets offer real life benefits above and beyond affection and companionship.

— Huntley Manhertz Jr.



goodliferecipe.com), you'll see this paragraph: "At the Goodlife Recipe Pet Care Co., a division of Mars Inc., we choose to get more out of life. A life filled with everything we love balanced with everything we need. To us, that's what a good life is all about. And we don't just want it for ourselves, we want it for our cats and dogs, too."

The humanization of pets is nothing new, and the relationship continues to evolve as pets further prove their importance in our lives. A recent survey conducted for the Goodlife Recipe brand shows celebrating life with pets is increasingly based on a more shared relationship because people are finding pets offer real life benefits above and beyond affection and companionship.

"The Goodlife Recipe food," reads the promotional material, "was developed to offer pets a variety of foods, snacks and treats that achieve the perfect balance of taste and nutritional value—without compromising on either." Its tag line is, "inspired by cat- and dog-loving people like you."

"We developed the Goodlife Recipe products to ensure the food we give our pets provides more than just the basics for good health and taste. Our philosophy involves a balanced approach and focuses on adding enjoyment to their lives. The Goodlife Recipe is all about

feeding pets nutritional, great-tasting foods that embody the love we feel for them," says Fiona Tomlin, the Goodlife Recipe brand vice president.

The cat litter market

Some months ago, I received a product from one of our readers called Pet Proof. This product claims to remove stains and eliminate unwanted pet odors from "you know what." I found the product to be amazing and it prompted me to talk a bit about the cat litter segment in my column this month.

Trends in this segment seem to mirror those we're seeing in the petfood market. In 2002, the size of the cat litter market was in the range of US\$1.2 billion to US\$1.5 billion and the overall growth rate of the category was 2-3% per year. This market is segmented into three groups: clay, clumping clay and alternative (litters that are not made from clay or minerals).

The clay segment accounts for about one-third of sales, the clumping clay segment about 60% of sales, and so that leaves 7-10% for the alternative segment. However, this segment is the fastest growing segment at 6% annually. Although the market for cat litter seems to be maturing, the trend toward premium products and other factors will contribute to modest sales

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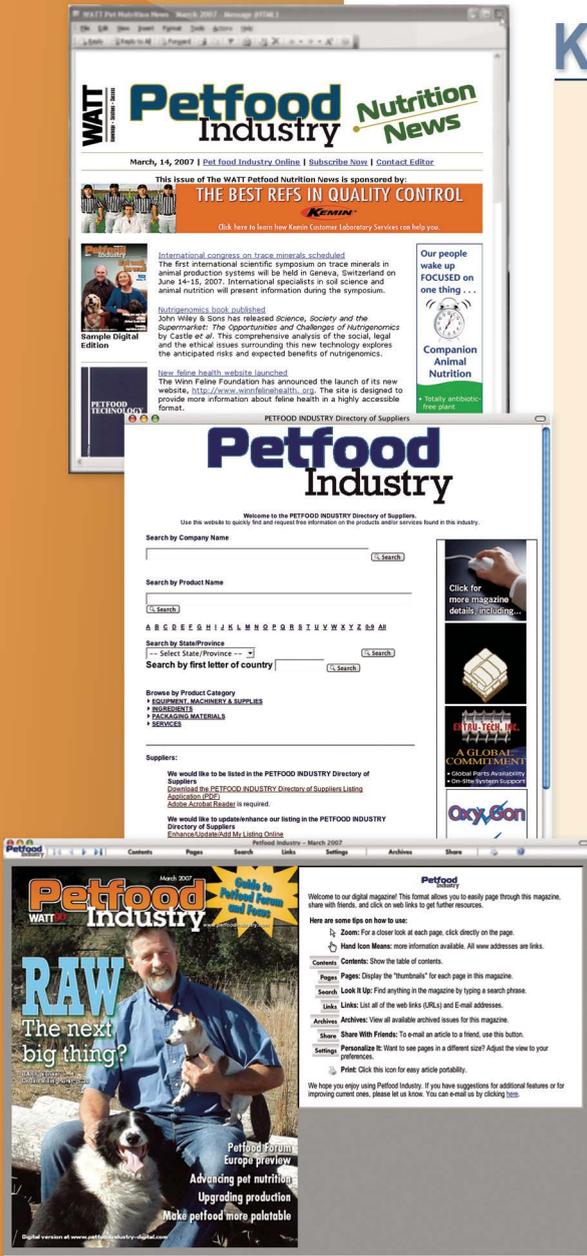
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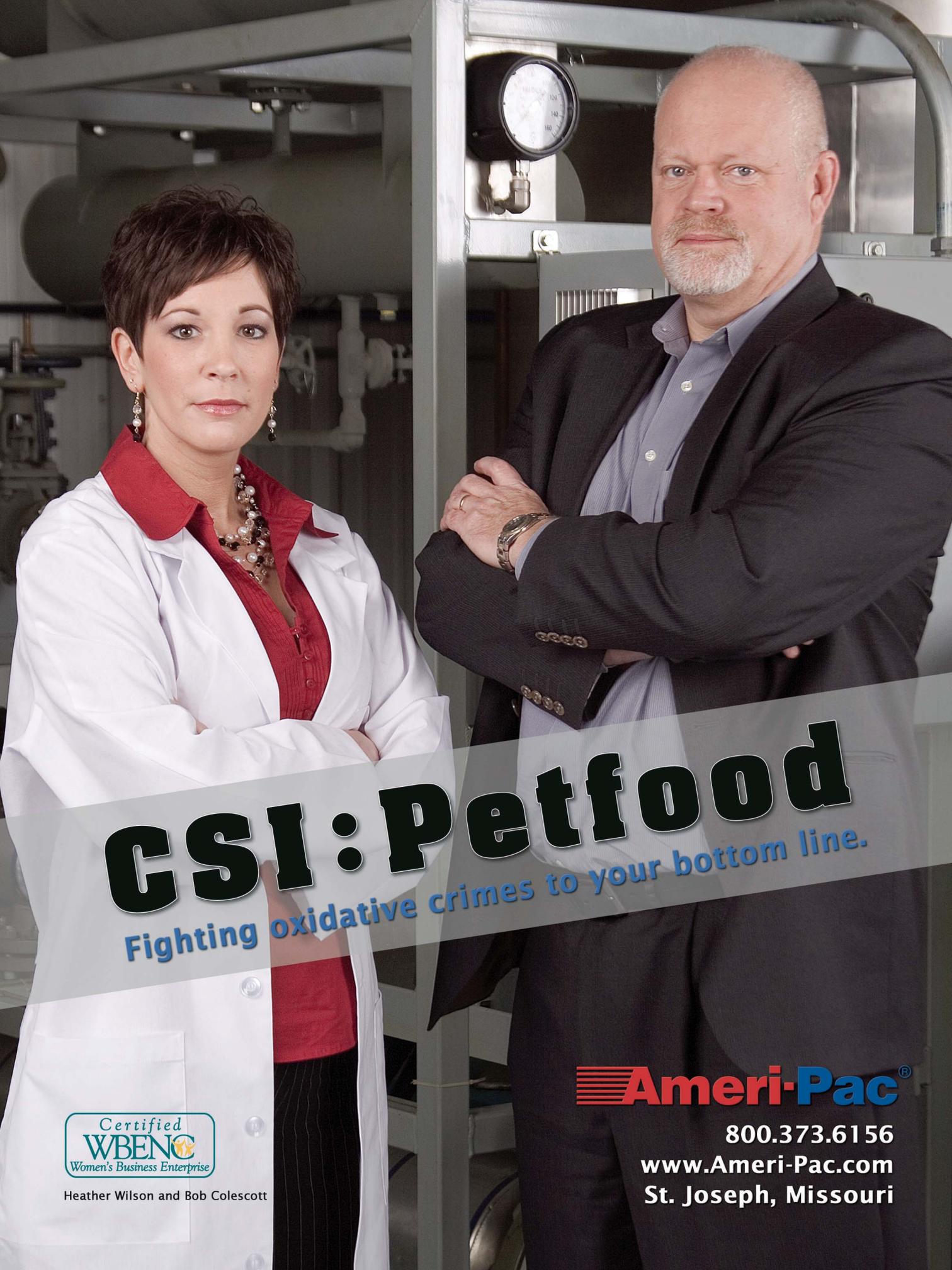
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growth for years to come. In 2005, cat litter sales at the retail level were up by 3.2% to US\$1.22 billion.

This modest growth trend will continue, as more pet owners become concerned about the global environment. New product introductions that tap into environmentally aware consumers and new information about the health risks of both traditional clay-based litters and newer silicone-based litters are combining to drive consumer interest in alternative (and more expensive) litter products.

The popularity of private label litters, which are undergoing a transformation along with the rest of the pet products segment, is another emerging trend seen in this segment. Private label cat litter is benefiting from its perceived value by consumers, as well as from the higher margins it offers

**In 2005,
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billion.**

to retailers. IRI reports that the average private label price per unit was US\$2.67, versus the branded product average of US\$4.22.

For the 52 weeks ending March 19, 2006, IRI reported that private label cat/dog litter and deodorant sales in food, drug and mass merchandisers (excluding Wal-Mart) was US\$103.1 million, up 3.8% versus 2005. At Wal-Mart, private label petfoods/supplies is the third-largest private label sales category, with an estimated US\$967 million in sales value. ●

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Research Notes

Natural source vitamin E chemistry and metabolism

Vitamin E is the generic name for lipid-soluble tocopherols and tocotrienols. Natural source vitamin E is derived from vegetable oils and is comprised of RRR-alpha-tocopherol, with very small amounts of beta, gamma and delta tocopherols and tocotrienols. Synthetic vitamin E, or all-racemic-alpha tocopherol (formerly known as dl-alpha tocopherol), consists of eight stereoisomers.

All eight alpha-tocopherol isomers of synthetic alpha-tocopherol appear to be absorbed in the intestine and

transported to the liver. In the liver, RRR-alpha-tocopherol is preferentially incorporated into very low density lipoproteins by alpha-tocopherol transport protein (alpha-TTP). The alpha-TTP preferentially binds RRR-alpha-tocopherol over the other RXX alpha-tocopherol forms, with minimal binding of SXX isomers.

A rat fetal resorption assay was used to determine the relative biological value of synthetic and natural source vitamin sources. In this assay, based on 1949 data, d-alpha-tocopheryl acetate had a biological value of 1.36

as compared to dl-alpha-tocopheryl acetate. Recent data suggests that the biological value of d-alpha-tocopheryl acetate is at least two times that of dl-alpha-tocopheryl acetate, likely due to the rat fetal resorption assay overestimating the value of the synthetic vitamin E source and underestimating the value of d-alpha-tocopheryl acetate. This 2:1 ratio is derived from the alpha-tocopherol binding protein and net tissue retention.

Source: D.A. Hill, ADM Alliance Nutrition Inc., 2007.

Key Concepts

► Natural source vitamin E chemistry and metabolism

(Hill, D.A., 2007): Recent data suggests that the biological value of d-alpha-tocopheryl acetate is at least two times that of dl-alpha-tocopheryl acetate, likely due to overestimation of the value of the synthetic vitamin E source and underestimating the value of d-alpha-tocopheryl acetate.

► Probiotics in health and disease of dogs and cats

(Beynen, A.C., 2007): This literature review suggests that administration of probiotics is beneficial in dogs and cats under stressful conditions.

► Linseed cake effect on digestibility

(JAPAN OnlineEarly articles): Working and racing dogs can utilize up to 4.2% linseed cake of diet DM as a fiber source without severe reductions in nutrient digestibility or feed consumption.

► Food intake effect on ileal digesta

(JAPAN OnlineEarly articles): Ileal digesta viscosity of dogs appears to increase with increased diet intake and increased ileal DM concentration. More digestible diets result in less ileal DM and lower viscosity constants.

Probiotics in health and disease of dogs and cats

This study presents an overview of the literature on the effects of probiotics in dogs and cats. Probiotics survive passage through the gastrointestinal tract, diminish proliferation of *Clostridia* and stimulate the immune system. Probiotic administration in the form of *Lactobacillus acidophilus* or *Enterococcus faecium* at a daily dose of 10^9 colony-forming units may be an effective adjuvant in the treatment of infectious diarrhea and may also prevent the development of diarrhea. It is suggested that administration of probiotics is beneficial in dogs and cats under stressful conditions such as weaning, change of home and situations of high animal density and variable



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group composition such as occurring in large colonies, kennels and pet shops. Literature reviewed indicated administration of probiotics has no adverse effects. No definite conclusion from the literature can be drawn as to the type, mixture and dose of probiotics that will be most beneficial. It is likely that multi-species probiotics will be more effective than a monostrain probiotic consisting of one strain of a certain species.

Source: Beynen, A.C., 2007. Literature review.

Linseed cake effect on digestibility

This experiment was conducted with a 6X4 cyclic changeover design. Six adult Alaskan Huskies were assigned to diets containing 0%, 2%, 4%, 6% and 8% linseed cake. A linear decrease in the apparent digestibilities of organic matter (OM) ($P < 0.020$), ether extract (EE) ($P < 0.003$), neutral detergent fiber ($P < 0.015$), nitrogen-free extract (NFE) ($P < 0.001$) and crude carbohydrates ($P < 0.001$) was noted. Digestibilities of dry matter (DM) and crude protein (CP) were unaffected by the treatment.

Wet weight of feces increased ($P < 0.001$) and DM of feces decreased ($P < 0.001$) linearly as the percentage of dietary linseed cake increased. Serum cholesterol concentration tended to decrease ($p = 0.094$) as the proportion of linseed cake increased. Apparent OM, EE, CP and NFE digestibility coefficients for linseed cake were 52%, 77%, 54% and 37%, respectively, and the digestible energy (DE) value was 13.22 MJ/kg DM.

Results showed that working and racing dogs fed the extruded and kibbled diet can utilize up to 4.2% linseed cake of diet DM as a fiber source without severe reductions in nutrient digestibility or feed consumption. Even higher levels of linseed cake, up to 8.5% of diet DM, can be used for normal or obese dogs, but more feces will be excreted.

Source: Kempe, R. and Saastamoinen, M., 2007. *Journal of Animal Physiology and Animal Nutrition* (OnlineEarly Articles).

Food intake effect on ileal digesta

Two experiments were conducted to determine dietary factors affecting digesta viscosity. In experiment 1, six ileal-cannulated dogs were either full ($607.1 \text{ kJ/BW}^{0.67}$) or restricted ($303.5 \text{ kJ/BW}^{0.67}$) fed. In experiment 2, four dog foods were surveyed for effects on digesta viscosity based on protein source [animal protein (AP) or plant protein (PP)] or dietary fiber source [soluble dietary fiber (SDF) or insoluble dietary fiber (IDF)].

Dry matter (DM) intake was higher ($P < 0.05$) when dogs were full (11.4 g/kg)

compared with restricted fed (5.98 g/kg). Ileal digesta viscosity tended to be higher ($P = 0.07$) for full fed [$10,251$ centipoise (cP)] compared with restricted-fed dogs ($6,677$ cP). Ileal digesta viscosities were $6,561$, $11,074$, $13,830$ and $15,967$ cP for dogs consuming IDF, SDF, AP and PP treatments respectively.

DM digestibility coefficients were lowest (71.2%) for the PP treatment and highest (88.7%) for the IDF treatment. Ileal digesta viscosity of dogs appears to increase with increased diet intake, and increased ileal DM concentration. More digestible diets result in less ileal DM and lower viscosity constants.

Source: Dikeman, C.L., Murphy, M.R. and Fahey, Jr., G.C., 2007. Food intake and ingredient profile affect viscosity of ileal digesta of dogs. *Journal of Animal Physiology and Animal Nutrition* (OnlineEarly Articles).

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Product News



Generic case printing systems

Iconotech offers equipment that prints shipping cases, wraparounds, die cuts and multi-wall kraft bags, contributing to the sustainability bottom line. On-demand printing eliminates or reduces pre-printed inventory, according to Iconotech. The level of purchasing complexity and going generic eliminates small run orders, may consolidate case sizes and frees a company to shop its generic inventory. Iconotech systems also eliminate printing plates and pre-printed case obsolescence.

Iconotech, P.O. Box 918, One Heritage Park Road, Clinton, CT, 06413 USA, Tel: +1.800.521.0194, Fax: +1.860.669.5109, E-mail: lbertelsen@iconotech.com, Website: www.iconotech.com.

Centrifugal impact mill grinds, de-lumps wet or dry solids

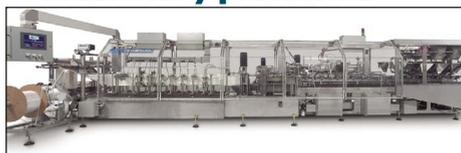


A new 24-inch (610 mm) sanitary stainless steel centrifugal impact mill Model CIM-24-SS from Munson Machinery provides coarse to fine grinding (325 mesh) of friable materials into controlled particle sizes, as well

as lump breaking and conditioning of fibrous materials. High-speed rotation of the inner disc creates centrifugal force that accelerates bulk material entering the central inlet of the opposing stationary disc. Setting the variable rotor speed between several hundred rpm and 5,400 rpm provides the flexibility to use the machine for coarse grinding and de-agglomerating as well as for fine grinding, says the company.

Munson Machinery Co. Inc., 210 Seward Ave., Utica, NY 13503 USA, Tel: +1.800.944.6644, E-mail: info@munsonmachinery.com, Website: www.munsonmachinery.com.

Stand-up pouch machinery platforms



The Robert's new generation C-series stand-up pouch packaging systems offer production outputs of up to 200 pouches per minute for popular stand-up style packaging targeted for a wide variety of products. The C-Series systems may be configured for press-to-close or slider zipper reclose features. According to the company, the new generation Robert's C-Series models incorporate new rapid change tooling modules for improved changeover. The new C-series models utilize advanced servo technology, improved operator interface (HMI) and new standard stainless steel construction for both dry and USDA production environments.

Alliedflex Technologies Inc., 8586 Potter Park Drive, Sarasota, FL 34238 USA, Tel: +1.941.923.1181, Fax: +1.941.922.0035, E-mail: dlc@alliedflex.com, Website: www.stand-up-pouch.com; www.robertspackaging.com.

VPL-400 packaging machine

The VPL-400 continuous motion machine is Rovema's latest develop-



ment incorporating modern linear servo drive technology. The VPL-400 is now available for the production of flat-bottom bags and Stabulo Seal bags. The VPL-400 allows users to set functions such as sealing time, sealing pressure, cooling time, speed and all jaw movements, both vertical and horizontal, for highest performance, flexibility and top seal quality, according to Rovema.

Rovema Packaging Machines, Tel: +1.770.513.9604, Fax: +1.770.513.0814, E-mail: ldelamora@rovema.com, Website: www.rovema.com.

Stackers for plants or warehouses

Stackers from Southworth Products allow workers to lift, transport and position up to 3,000 pounds at a time. Available with manual or electric drives, Southworth Stackers feature battery-



powered electric lift with lifting heights of up to 80 inches. Designed to handle any type of pallet or skid, they are available in two basic configurations. According to Southworth, the “fork over” design works with any type of open-bottom pallet or skid, and the “straddle” style accommodates any pallet or skid, even those with “closed” bottoms.

Southworth Products Corp., P.O. Box 1380, Portland, ME 04104 USA, Tel: +1.207.878.0700, Fax: +1.207.797.4734, E-mail: salesinfo@southworthproducts.com, Website: www.southworthproducts.com.

500-gallon double planetary mixer



Charles Ross & Son Co. recently introduced its improved 500-gallon Double Planetary Mixer. The mixer is equipped with special high viscosity (HV) mixing blades. The HV blade design permits the mixing of extremely viscous materials. Most of the heavy-duty double planetary mixers are used for non-flowing materials that require deaeration to ensure an air-free product before packaging. Designs are available from 1 pint through 750 gallons capacity. A variety of options, including complete control packages, discharge systems and sanitary designs, are available.

Charles Ross and Son Co., P.O. Box 12308, Hauppauge, New York 11788 USA, Tel: +1.800.243.ROSS, Fax: +1.631.234.0691, E-mail: sales@mixers.com.



Packaging machines offer simple reliability

Fully automatic Rollstock vacuum packaging machines are readily available and provide reduced cost of ownership, according to the company. Available in a variety of web widths from 285 mm to 459 mm, all Rollstock machines feature programmable PLC controls with readable diagnostics and a vacuum leak check program. The

chain system is guided and has an auto-tensioning system to reduce stretch and wear. Dies are manufactured in Rollstock’s facility from solid aluminum block and lifted by a triple knee lever system, driven by a 4-inch air cylinder with variable height control.

Rollstock Inc., Craig McBee, 8600 N.E. Underground Drive, Kansas City, MO 64161 USA, Tel: +1.888.314.2152, Website: www.rollstock.com.

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DDC preconditioner No. 600 produced

Wenger Manufacturing recently announced the production of the 600th differential diameter cylinder (DDC) preconditioner since the product was patented and introduced in 1987. Sizes range from 56 liters to 3,060 liters, which can process meal throughputs ranging from 50-24,000 kg/hr. Retention time of the recipe in the DDC preconditioner can be controlled from 30 seconds to 8 minutes. The product offers several advantages to users.

Wenger, 714 Main St., Sabetha, KS 66534 USA, Tel: +1.785.284.2133, Fax: +1.785.284.3771, E-mail: info@wenger.com, Website: www.wenger.com.

High-speed palletizer

A-B-C Packaging has introduced a high-speed palletizer with a low-level construction that gives packagers the convenience and economy of floor-level operation with the performance most often associated with high-level machines. The palletizer features a novel automatic grouping module that



allows layer transfer during product accumulation, effectively staging and stacking layers every 15 seconds (four layers per minute). Products are repositioned to any required orientation during high-speed operation with the servo-operated overhead orienter.

A-B-C Packaging, 811 Live Oak St., Tarpon Springs, FL 34689 USA, Tel: +1.800.237.5975, Fax: +1.727.938.1239, Website: www.abcpackaging.com.

Trouble-free palletizing

Schneider Packaging Equipment Co. Inc. introduces the Schneider Bag Palletizer, available for single and multiple line systems. According to Schneider, it is ideal for bag palletizing of heavy or industrial sized bags of product. Schneider's state-of-the-art Bag Palletizer offers consistent throughput where well-packed unit loads are essential.

Throughput of up to 20 bags per minute can be achieved depending on product and pack pattern requirements. Schneider customizes the end of arm gripping tools on each machine for optimal performance based on your specific environment and product characteristics.



Schneider Packaging Equipment Co. Inc., P.O. Box 890, 5370 Guy Young Road, Brewerton, NY 13029 USA, Tel: +1.315.76.035, Fax: +1.315.676.2875, Website: www.schneiderequip.com.

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► **Japan Pet Fair**, March 29-April 1, 2007, Pacifico Yokohama, Tokyo. Contact: Tomo Miura, Tel: +81.3.3512.5674, E-mail: jpf2007@smj.co.jp, Website: www.jpjpm.or.jp/2007jpf/e/index.html.

► **H.H. Backer Spring Trade Show**, March 30-April 1, 2007, Atlantic City Convention Center, Atlantic City, New Jersey, USA. Contact: H.H. Backer Associates Inc., 200 S. Michigan Ave., Suite 840, Chicago, Illinois 60604 USA, Tel: +1.312.663.4040, Fax: +1.312.663.5676, E-mail: hhbacker@hhbacker.com, Website: www.hhbacker.com

► **Petfood Forum**, April 16-18, 2007, Hyatt Regency O'Hare Hotel, Chicago, Illinois, USA. Contact: Marcia Riddle, Watt Publishing Co., 122 S. Wesley Ave., Mt. Morris, Illinois 61054 USA, Fax: +1.815.734.5631, E-mail: mrriddle@wattnet.net, Website: www.wattnet.com/petfoodforum.

► **Petfood Focus on Treats**, April 18-19, 2007, Hyatt Regency O'Hare Hotel, Chicago, Illinois, USA. Contact: Marcia Riddle, Watt Publishing Co., 122 S. Wesley Ave., Mt. Morris, Illinois 61054 USA, Fax: +1.815.734.5631, E-mail: mrriddle@wattnet.net, Website: www.wattnet.com/petfoodforum.

► **DeZooFa**, May 4-6, 2007, Wiesbaden, Germany. Contact: De-ZooFa, Tel: +49.611.144.295, Fax: +49.611.144.6295, E-mail: dezoofa@rhein-main-hallen.de, Website: www.dezoofa.com.

► **Petfood Forum Europe**, May 8, 2007, Utrecht, Netherlands. Contact: Marcia Riddle, Watt Publishing Co., 122 S. Wesley Ave., Mt. Morris, Illinois 61054 USA, Fax: +1.815.734.5631, E-mail: mrriddle@wattnet.net, Website: www.wattnet.com/petfoodforum.

► **Victam International**, May 8-10, 2007, Utrecht, Netherlands. Contact: Henk van de Bunt, Victam International B.V., P.O. Box 197, 3860 AD Nijkerk, Netherlands, Tel: +31.33.246.4404, Fax: +31.33.246.4706, E-mail: expo@victam.com, Website: www.victam.com.

► **Zoomark International**, May 10-13, 2007, Bologna, Italy. Contact: Piesse srl, via Rezzonico 23, 22100 Como, Italy, Tel: +39 31 301059, Fax: +39 31 301418, E-mail: vimax@zoomark.it, Website: www.zoomark.it.

► **Alltech's 23rd International Feed Industry Symposium**, May 20-23, 2007, Lexington, Kentucky, USA. Contact: Paulo Rezende, events manager, Alltech, 3031 Catnip Hill Pike, Nicholasville, KY, 40356, USA, Tel: +1.859.887.3328, Fax: +1.859.881.2237, E-mail: symposium@alltech.com, Website: www.alltech.com/symposium.

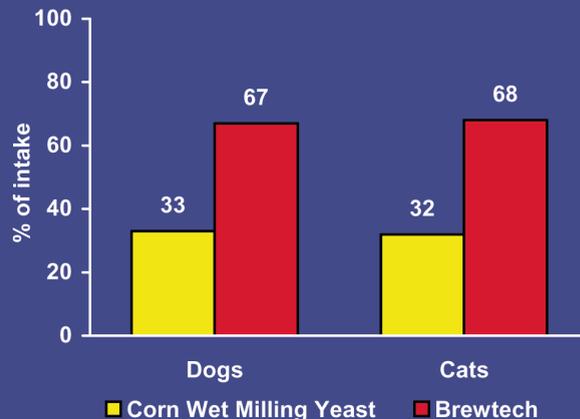
► **VIV Russia**, May 21-23, 2007, Crocus Expo Exhibition Center, Moscow, Russia. Contact: Richard de Boer, VNU Exhibitions Europe, P.O. Box 8800, 3503 RV Utrecht, Netherlands, Tel: +31.30.295.2714, Fax: +31.30.295.2809, E-mail: richard.de.boer@vnuexhibitions.com, Website: www.vnuexhibitions.com or www.viv.net.

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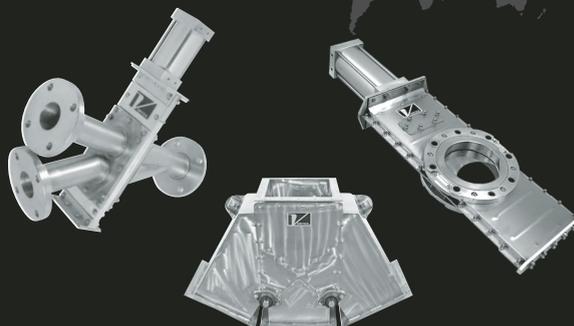


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> **ACVIM Annual Forum**, June 6-8, 2007, Seattle, Washington, USA. Contact: ACVIM, 1997 Wadsworth Blvd., Suite A, Lakewood, Colorado 80214-5293 USA, Tel: +1.303.231.9933, Fax: +1.303.231.0880, E-mail: acvim@acvim.org, Website: www.acvim.org.

> **ZDS Petfood Update**, June 18-19, 2007, Solingen, Germany. Contact: ZDS, De Leuw-Str. 3-9, 42653 Solingen, Germany, Tel: +49.212.59.610, Fax: +49.212.59.6161, E-mail: info@zds-solingen.de, Website: www.zds-solingen.de.

> **VIV Turkey**, June 28-30, 2007, Istanbul, Turkey. Contact: Richard de Boer, VNU Exhibitions Europe, P.O. Box 8800, 3503 RV Utrecht, Netherlands, Tel: +31.30.295.2714, E-mail: richard.de.boer@vnuexhibitions.com, Website: www.vnuexhibitions.com or www.viv.net.

> **Animals Science/Poultry Science 2007 Joint Annual Meeting**, July 8-12, 2007, San Antonio, Texas, USA. Contact: Poultry Science Association, 1111 N. Dunlap Ave., Savoy, IL 61874 USA, Tel: +1.217.356.5285, Fax: +1.217.398.4119, Website: www.poultryscience.org.

> **AVMA/AAAP Annual Convention**, July 14-18, 2007, Washington, D.C., USA. Contact: AVMA, 1931 N. Meacham Road, Suite 100, Schaumburg, Illinois 60173 USA, Tel: +1.847.925.8070, Fax: +1.847.925.1329, E-mail: avmainfo@avma.org, Website: www.avma.org.

> **IFT Annual Meeting and Food Expo**, July 26-30, 2007, Chicago, Illinois, USA. Contact: Institute of Food Technologists, 525 W. Van Buren, Suite 1000, Chicago, Illinois 60607 USA, Tel: +1.312.782.8424, Fax: +1.312.782.0045, E-mail: info@ift.org, Website: www.ift.org.

> **AAFCO Annual Meeting**, August 1-4, 2007, Amway Grand Plaza Hotel, Grand Rapids, Michigan, USA. Contact: Gina Davis, Tel: +1.517.241.2084, E-mail: DavisG9@michigan.gov, or Tina Salisbury, Website: www.aacomichigan2007.com.

> **PIJAC Canada**, September 16-17, 2007, Toronto, Ontario, Canada. Contact: Pet Industry Joint Advisory Council – Canada (PIJAC), 2442 St. Joseph Blvd., Suite 102, Ottawa, Ontario K1C 1G1 Canada, Tel: +1.613.834.2111, Fax: +1.613.834.4854, E-mail: executiveoffice@pijaccanada.com, Website: www.pijaccanada.com.

> **GLEE Petindex**, September 16-18, 2007, Birmingham, England. Contact: Adam Ash, Tel: +1.609.921.0222, E-mail: reg@whitehoundadv.com.

> **SuperZoo West**, September 18-20, 2007, Mandalay Bay Convention Center, Las Vegas, Nevada, USA. Contact: World Wide Pet Industry Association (WWPIA), Tel: +1.800.999.7295, Website: www.wwpia.org.

> **Sizoo**, September 20-23, 2007, Barcelona, Spain. Contact: Tel: +34.93.233.2000, Website: www.sizoo.com.

> **Pet South America**, September 26-28, 2007, Transamerica Expo Center, Sao Paulo, Brazil. Contact: VNU Business Media, Tel: +55.11.4613.2000, Fax: +55.11.4613.2001, E-mail: pet@vnu.com.br, Website: www.vnu.com.br.

> **AACC Annual Meeting**, October 7-10, 2007, San Antonio Convention Center, San Antonio, Texas, USA. Contact: American Association of Cereal Chemists, 3340 Pilot Knob Road, St. Paul, Minnesota 55121-2097 USA, Tel: +1.651.454.7250, Fax: +1.651.454.0766, E-mail: aacc@scisoc.org, Website: www.aaccnet.org.

> **PetExpo**, October 10-16, 2007, Melbourne Exhibition & Convention Center, Melbourne, Australia. Contact: Pet Industry Association of Australia Ltd (PIAA), P.O. Box 7108, Baulkham Hills Business Center, Baulkham Hills N.S.W. 2153, Australia, Tel: +61.2.9659.5811, Fax: +61.2.9659.5822, E-mail: info@piaa.net.au, www.piaa.net.au.

> **H.H. Backer Christmas Trade Show**, October 12-14, 2007, Donald E. Stephens Convention Center, Rosemont (Chicago), Illinois, USA. Contact: H.H. Backer Associates Inc., 200 S. Michigan Ave., Suite 840, Chicago, Illinois 60604 USA, Tel: +1.312.663.4040, Fax: +1.312.663.5676, E-mail: hbacker@hhbacker.com, Website: www.hhbacker.com.

> **PFI Annual Meeting and Supplier's Mart**, October 15-16, 2007, Omni Shoreham Hotel, Washington, D.C., USA. Contact: PFI, 2025 M St. N.W., Washington, D.C. 20036 USA, Tel: +1.202.367.1120, E-mail: info@petfoodinstitute.org, Website: www.petfoodinstitute.org.

> **Pack Expo International Conference 2007**, October 15-17, Las Vegas, Nevada, USA. Contact: Packaging Machinery Manufacturers Institute (PMMI), 4350 N. Fairfax Drive, Suite 600, Arlington, Virginia 22203 USA, Tel: +1.703.243.8555, +1.888.275.7664, Fax: +1.703.243.3038, E-mail: expo@pmmi.org, www.packexpo.com.



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In case you needed confirmation that the petfood industry is a good one to be part of, new research provides just that. According to the 2007-2008 APPMA National Pet Owners Survey, just released by the American Pet Products Manufacturers Association, the number of US households that own some kind of pet has increased by 2 million since 2004, the last time the survey was conducted.

Those 71 million pet-owning households in 2006 represent 63% of the US population, a percentage that has held steady for several years now. The households own a total of about 74.8 million dogs, 88.3 million cats, 16 million birds, 24.3 million small animals, 13.4 million reptiles, 13.8 million horses and nearly 150 million fish. Those numbers represent a slight increase for dogs (1.2%) and fish (2.2%), a slight decrease for cats (-2.4%) and birds (-3.6%) and whopping growth for small animals (33.5%) and reptiles (21.8%). (Horse ownership was not previously measured.)

Most importantly for the makers of pet products, those households spent US\$38.5 billion on their pets in 2006—US\$15.4 billion of that on petfood, according to the survey. Based on the increase in these numbers since 2004, APPMA projects them to reach US\$40.8 billion and US\$16.1 billion, respectively, by the end of this year.

Health: powerful trend

Where specifically is that growth coming from? For one thing, US owners are increasingly pampering their pets with treats; at least 69% of US pets receive them, with a full 90% of

Those households spent US\$38.5 billion on their pets in 2006—US\$15.4 billion of that on petfood.

— Debbie Phillips-Donaldson



dogs enjoying them. For birds, treat usage increased from 73% in 2004 to 82% in 2006.

Judging by the number of new treats on display at the Global Pet Expo—held in February in Orlando, Florida, USA, and where APPMA first released the survey results—many of you are contributing to and capitalizing on that trend.

Besides food and treats, another large product category is pet health, according to the survey. This includes veterinary care, pet insurance, pharmaceuticals and over-the-counter medications, as well as specialty and functional food products: weight management foods, sports drinks, energy treats, treatments, supplements and natural and organic offerings.

In fact, APPMA cites pet health as the “most powerful trend across the industry.” Pet owners can afford to feed this trend thanks partly to their healthy incomes, reported to be higher than those of the total US population. Dog owners, for example, have an average annual income of US\$49,000 compared with the overall US average of US\$43,000, according to the survey. The average annual income of all US pet owners is US\$47,000.

Looking globally

Currently, North America owns 38% of the total global pet market of US\$58.2 billion, according to Euro-monitor International. (These are 2005 numbers, the most recent global figures available.) Experts expect that developed regions like the US and Western Europe will gradually lose market share to developing areas like Asia (especially China), Latin America and Central and Eastern Europe, but all will still continue to grow. And that’s certainly good news.

For more information on the future of the global petfood market, watch for the May issue of *Petfood Industry*, which will feature a report on exclusive research we’ve conducted with Packaged Facts. Highlights of this research will also be presented at Petfood Forum this month (April 18) in Chicago, Illinois, USA, and at Petfood Forum Europe on May 8 in Utrecht, Netherlands. Check out www.wattnet.com/peffoodforum for details. ●

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

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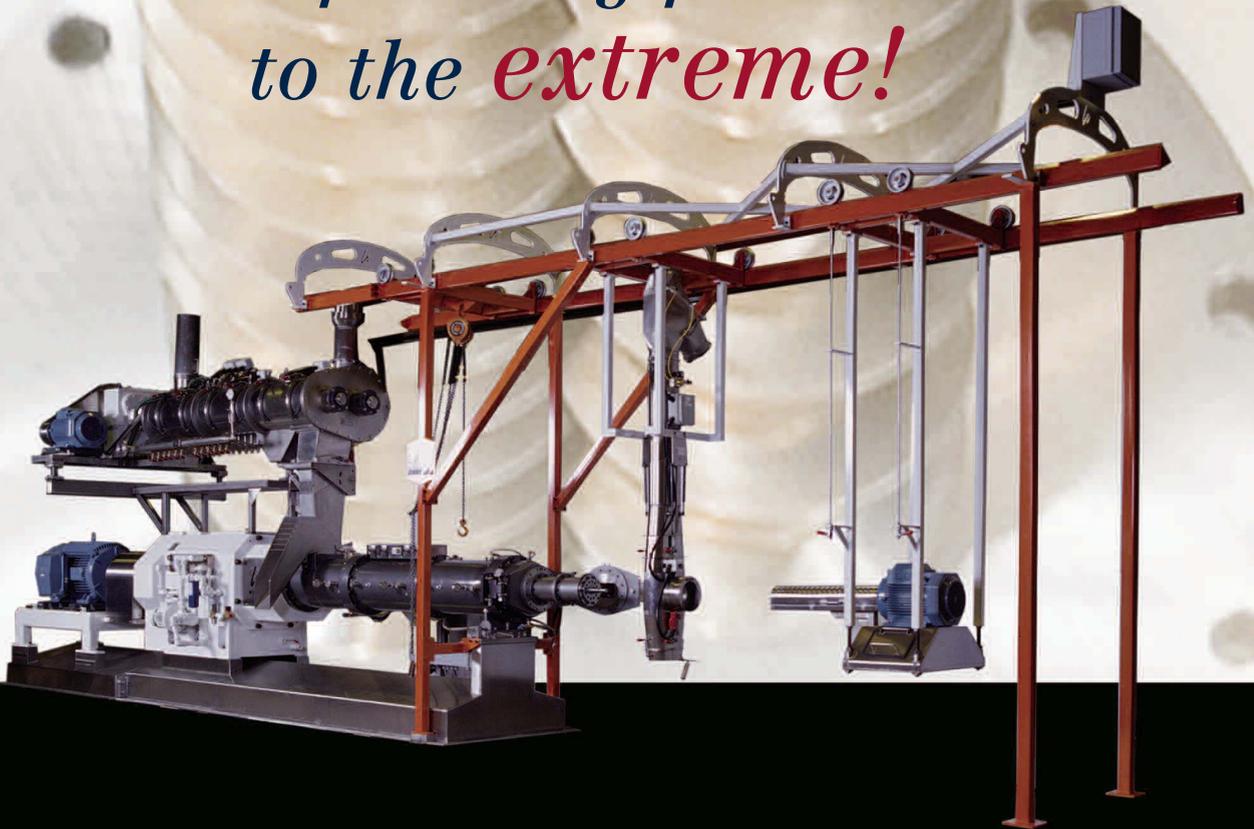
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