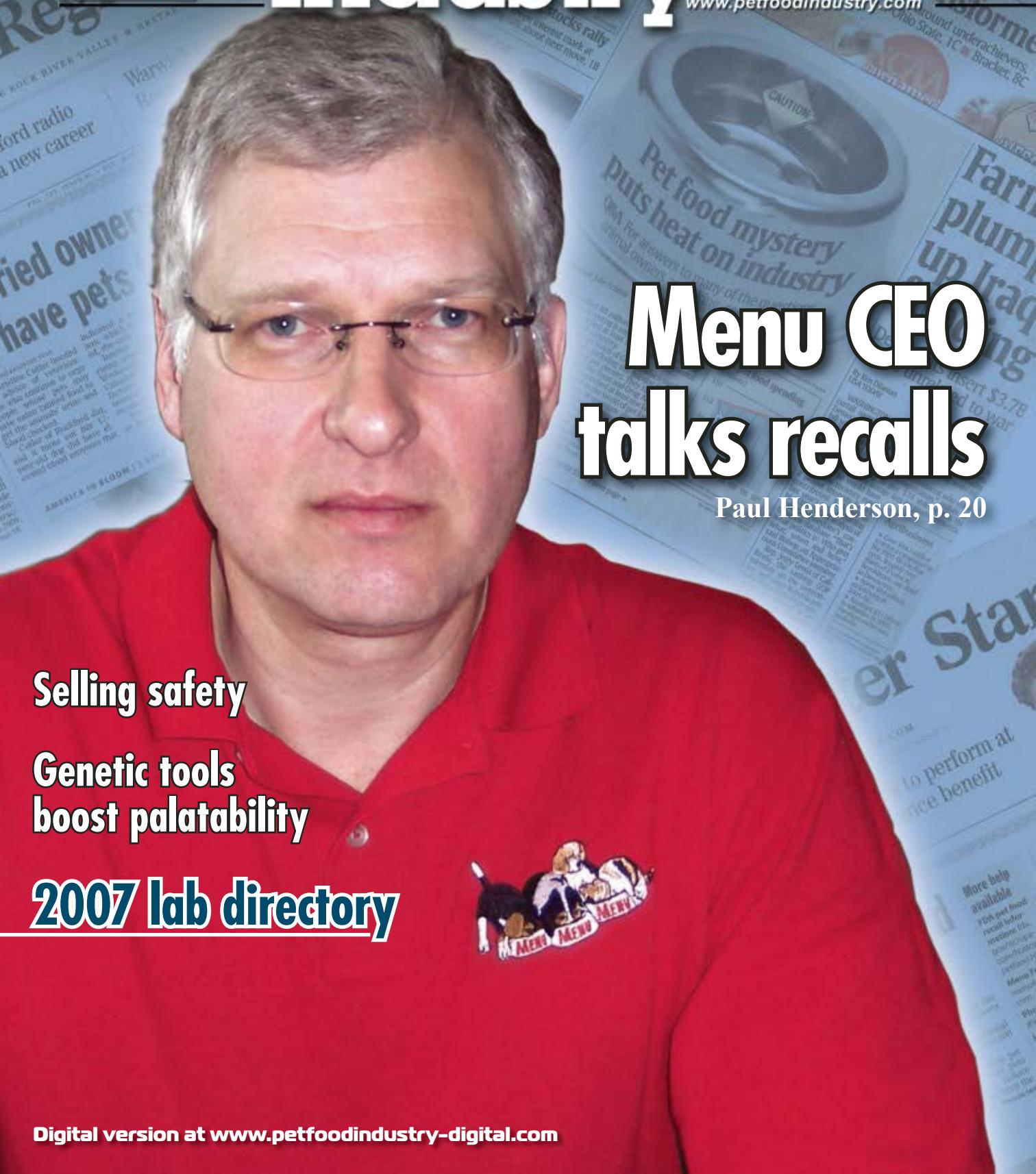


September 2007

Petfood Industry

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Menu CEO talks recalls

Paul Henderson, p. 20

Selling safety

**Genetic tools
boost palatability**

2007 lab directory



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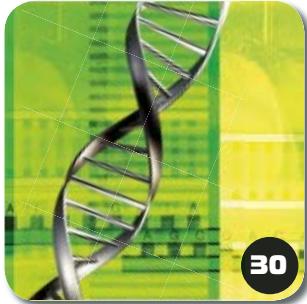
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Good ideas for preventing disaster

I attended the thought-provoking annual meeting of the Association of American Feed Control Officials in early August. There I learned about the National Animal Supplement Council (NASC) efforts to ensure the safety of animal supplements. I think you'll find them well thought out and interesting.

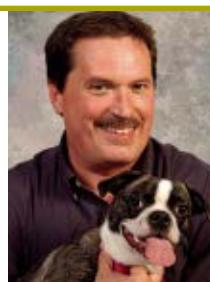
NASC preferred vendors

The NASC (www.nasc.cc) was concerned that some raw material suppliers were providing false certificates of analysis (CA) for ingredients. The supplements industry had historically relied on a supplier's CA as the sole means of verifying the authenticity of a raw material. Because of the falsification of some CAs, NASC set up a preferred vendor program. It requires raw material vendors to independently verify their CAs. This verification is done by independent labs that NASC specifies. Currently, three labs are used to verify raw material suppliers CAs: Schuster, Eurofins and Analytical Labs. To qualify as a NASC preferred vendor the ingredient supplier must perform the following:

- ▶ A specific sample from each unique batch or lot must be independently tested by one of the three US laboratories specified.
- ▶ Independent testing must be completed for each specification on the supplier's CA, which will provide verification.
- ▶ In addition NASC may require additional testing for potential contaminants at the

The computer program used in their adverse event reporting system could easily be adapted for the petfood industry.

— Tim Phillips



discretion of NASC.

- ▶ Each batch or lot of raw material (ingredient) sold to a NASC member must be accompanied by the vendor's CA and the laboratory report.

Early warning system

About four years ago, NASC initiated its customized adverse event reporting system (NAERS) and gave the US Food & Drug Administration access. The current database consists of more than 300 million total administrations of various supplement products for horses, dogs and cats.

"It is cost prohibitive for members and suppliers to conduct safety studies such as those required for drug companies," says Bill Bookout, NASC president. "However, we do understand the need to maintain vigilance for both products and ingredients. Our adverse event reporting system provides members with a comprehensive system to help them properly evaluate adverse events and take corrective action if necessary." Bookout notes NASC is ca-

pable of producing a risk report for any ingredient marketed by members.

NASC considers an adverse event a complaint linked to any negative physical effect or health problem that may or may not be associated with the use of an animal supplement. An adverse event includes transient occurrences such as diarrhea or vomiting. Each member company is required to report, investigate and resolve any adverse event monthly.

NAERS has been in place since 2003, but to get a more complete view NASC members are entering historical data as far back as 1995. NASC members are required to enter their adverse events on a monthly basis, or attest there were no events reported. The system tracks adverse events by product/ingredient, as well as the aggregate administrations for 643 ingredients in the marketplace. Bookout tells me that the computer program used in their adverse event reporting system could easily be adapted for the petfood industry. Sounds like an idea worth checking out. ●

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



The NASC is committed to educating consumers about the benefits of purchasing products that display the NASC seal of quality through advertising and PR.



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Industry News



Petfood Forum to debut in Asia

Petfood Forum, the premier event for the petfood industry for 15 years, will debut in Asia March 5 in Bangkok, Thailand, as part of Victam Asia 2008, the agrifeed event.

Petfood Forum Asia will be the meeting place for petfood professionals in Asia and around the world. It will include networking opportunities as well as sessions on:

- Global and Asian petfood sales trends;
- Petfood safety and traceability;
- Update on nutrition;
- New and functional ingredients;
- Advances in palatability;
- Hot product trends.

Registration includes a light breakfast, buffet lunch and coffee break. Early-bird registration fee (through January 15, 2008) is US\$225 and registration after January 15 is US\$275. Register and check for regular updates on the program at www.petfoodindustry.com/petfoodforum.aspx.

AAFCO discusses calorie statements

The Association of American Feed Control Officials (AAFCO) held its annual meeting in Grand Rapids, Michigan, USA, August 1-3. In the Pet Food Committee, there was a great deal of discussion about the American College of Veterinary Nutritionists' proposal to amend the AAFCO Model

Pet Food Regulations to require mandatory calorie statements on dog and cat food labels. At present voluntary calorie statements are permitted with a calculation method designated for regulating such claims. Industry representatives voiced opposition, saying the proposal is not needed.

In other news, the AAFCO Board postponed consideration of the new Policy Statement 29. The policy would allow educational statements on petfood labels without activating a requirement for guarantees of nutrients or ingredients, e.g. "Meat and Bone Meal for Calcium for Strong Bones and Teeth." The AAFCO Board and membership are expected to consider it at their January 2008 meeting.

Euromonitor launches Passport Ingredients

Euromonitor International has launched *Passport Ingredients*, a web-based subscription product and information system that measures the use of ingredients in consumer products. The research system is a first for market analysis in the ingredients industry, according to Euromonitor. The system analyzes and measures volume demand for 400 ingredients across 600 product categories in 80 different countries.



Passport Ingredients combines ingredients statistics with analysis of the key drivers influencing ingredient demand. The product has been developed by applying recipes and formulations of leading brands to existing Euromonitor product volume data. The result is ingredient tonnages by category based on actual consumption.

Passport Ingredients analyzes both supply and demand-side issues, from consumer and product trends

such as growing health awareness and flavor preferences, to product and technology developments.

"Being able to transparently size the market for all these ingredients is valuable in itself, but being able to tell companies into which products ingredients are going, and how this is evolving over time, is a first," explains John Madden, ingredients manager at Euromonitor International.

Action filed to compel FDA investigation

In May and June of this year, a Texas laboratory claimed to have discovered acetaminophen in samples of petfood submitted by petfood manufacturers and consumers. On June 5, the FDA announced it would launch its own investigation into the claims. Eight days later the agency concluded, "At this point, FDA sees no compelling need to analyze any more samples for acetaminophen," stated FDA spokesman, Mike Herndon.

According to lab personnel and consumers who submitted the samples, the FDA reached this conclusion without testing the petfood found to be contaminated with acetaminophen. On August 9, an action was filed to compel another FDA investigation into the petfood poisonings of companion animals, calling the FDA's five-month investigation "whimsical."

The main issues raised in the action claim the FDA has controlled, withheld and otherwise manipulated information, and destroyed essential evidence; and that the agency has focused on melamine, to the exclusion of contrary evidence and expert testimony showing the substance to be virtually nontoxic. The action seeks non-monetary relief, asking the FDA to properly investigate recalled and unrecalled petfood and to cease destroying related petfood evidence.

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Menu Foods loses biggest customer

Menu Foods Income Fund reported a second-quarter net loss of C\$3.6 million, or 19 cents a unit, compared with a profit of C\$1.97 million, or 11 cents, a year earlier. Sales fell to C\$47.2 million, a 44% drop. Since the March 16 recall, customers accounting for at least 16% of revenue have stopped using Menu Foods Ltd. and units have plunged 58% since March 15, the day before the recall was announced.

On August 14, 2007, Menu Food's biggest customer announced it would stop buying products from the company in the fourth quarter. The unnamed customer, whose total purchases made up nearly 10.8% of Menu Food's sales volume in 2006, said it would stop buying loaf products from Menu starting October 1. Earlier this year, the same customer said it would stop purchases of other Menu Foods products.

"Menu Foods is disappointed in the

reaction of this customer to the pet-food recall. The intentional tainting of product inputs from a third party supplier in China was a fraudulent act that victimized many petfood manufacturers, customers and consumers," Paul Henderson, Menu's president and chief executive, said in a statement.

Menu Foods will also sell a U.S. production facility in South Dakota and other assets to Mars Inc. for US\$26.3 million. Mars no longer wants Menu to produce its Royal Canin and Nutro brands of petfood and the proceeds will go to pay down debt, Menu said.

Pets Choice to undergo expansion

Pets Choice Ltd., Lancashire, UK, is to undergo an expansion program after management completed a buy-out of the firm. The directors of Pets Choice have completed the acquisition of the company after purchasing its entire share capital. Tony Raeburn, chief

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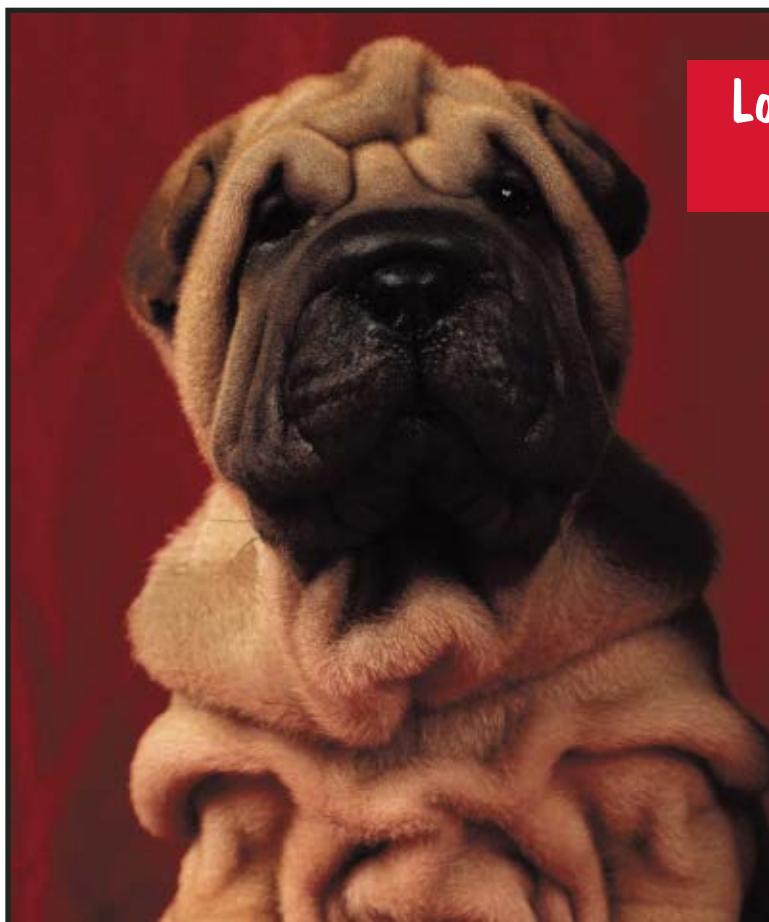
at www.petfoodindustry.com.

executive of Pets Choice, and Ted Davies, executive vice chairman, bought the firm for an undisclosed fee. They have now become directors and shareholders of the new company, called Pet Food Brands Limited (PFB).

The new board has promised to invest cash to expand the company and hopes a number of new jobs will be created. Running and trading arrangements of the firm will remain unchanged following the deal. The company will continue to trade as Pets Choice Ltd. and PFB will act solely as the group holding company.

Natural Balance named in lawsuit

On August 8, 2007, a class action lawsuit was filed in San Francisco Superior Court by attorney William Audet,



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who is believed to be the first to target a Chinese company in the petfood recall cases. This lawsuit is particularly unusual because it uses both California and Chinese consumer protection laws. The lawsuit seeks damages up to US\$5 million on behalf of pet owners whose animals ate contaminated food and also asks for an undisclosed amount of money for mental anguish for the loss of pets.

The biological technology company targeted by the suit shipped contaminated rice protein into San Francisco. The protein went into some Natural Balance Pet Food products, which is named in the lawsuit and was among many brands tainted with melamine.

Surprised to be named in the suit, Natural Balance president Joey Herrick said his company has paid all claims of people whose pets died or were sickened by the tainted food. According to Herrick, Natural Balance has paid more than US\$100,000 to nearly 200

pet owners, including vet bills and in some cases, the cost to replace an animal. In one case, he said, US\$14,000 was paid to a pet owner to cover veterinary care that eventually saved the animal's life.

Canned petfood recalled due to botulism scare

The Food and Drug Administration (FDA) is warning consumers about more than 80 types of stew, chili, hash and petfood produced out of

Castleberry's Georgia-based plant. Castleberry has temporarily closed the plant where the foods were produced. Castleberry's says using the products could result in botulism poisoning, the country's first major botulism threat in over 30 years.

The canned petfood products affected by the recall are Natural Balance Eatables for Dogs. For a full list-

ing of recalled products and barcode numbers, visit http://castleberrys.com/news_productrecall.asp.



PFI to kick off its 50th year celebration

The Pet Food Institute will be kicking off its 50th year celebration at its annual meeting October 15-16 at the Omni Shoreham Hotel in Washington, DC, USA. A technical session on the morning of the second day, which is presented by only affiliate members of PFI, is an educational forum for the attendees of the annual meeting and typically incorporates presentations by three speakers on the chosen subject. The session is a non-commercial presentation on new information and technologies of benefit to PFI members.



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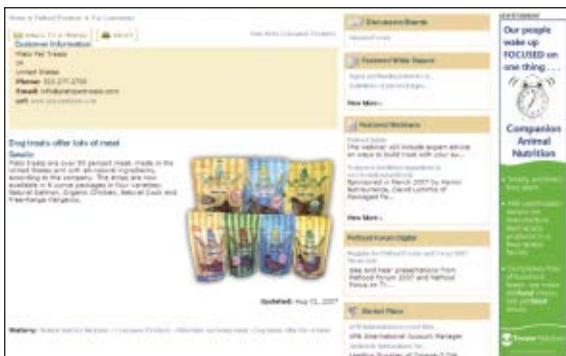
An important tool for knowing the industry

Now that you've gotten a chance to begin exploring some of the features of PetfoodIndustry.com, why not take a moment to check out some of the site's dynamic content? Navigating through the abundance of information on the site may seem like a daunting task, but once you become familiar with different areas and what they have to offer, you'll be pointing and clicking your way to a wealth of petfood knowledge.

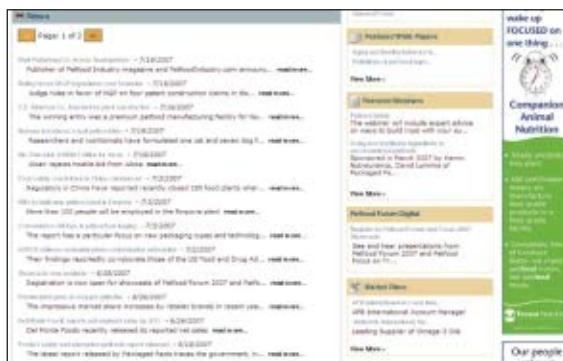
On the homepage of PetfoodIndustry.com you'll find the section Featured Columns on the bottom left. This feature allows you to choose from some of *Petfood Industry's* engaging monthly columns. Catch up on Editorial Notes you missed or read the latest from Ingredient Issues.



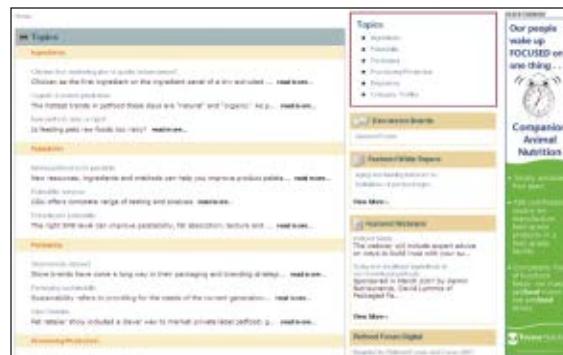
Also located on the homepage, above the Featured Columns, is the New Products box. Click on the Consumer or Manufacturer sections to browse through the hottest new petfood products or offerings from suppliers to the industry.



For up-to-the-minute news, click on a headline that catches your eye in the Industry News section, located on the top left of the homepage. For an entire list of news, click the View All button in the right-hand corner of each news item.



A large portion of the PetfoodIndustry.com homepage consists of Topics such as Ingredients and Company Profiles. If you're looking for a specific article, just click on the topic you're interested in. For a more generalized list of all topics available, click the Topics tab at the top middle of the page and browse from there.



Our Featured Articles section is always changing, so check back often. To fully immerse yourself in PetfoodIndustry.com, make sure to peruse our Featured Research and Nutrition News sections, where you'll find content to help you on the job everyday.

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This webinar is presented by Petfood Industry magazine and sponsored by Alcan Packaging and Packaged Facts.

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AKC puppy training treats

AKC premium puppy training treats are made with real liver and come in a 6oz. resealable bag to maintain freshness. The moist treats are nutritionally formulated for health and longevity and fortified with vitamins, according to the manufacturer. www.jakkspacific.com

Treats use meat, not wheat

Biscuits with Benefits are made with all-natural chicken breast and no wheat, corn, by-products, artificial flavors, colors and no added sugar or salt, according to Dogswell. The treats are available in supplemental varieties including Happy Hips, Vitality and Breathies. www.dogswell.com



Canine dental health bars

Bluechews are canine dental health bars developed by Veterinary Scientific, a division of Vetradent Inc. The bars reduce plaque by 22% and tartar by 61%, according to the company. The soft outer cover is designed to allow a dog's tooth to penetrate the chew, which promotes dental cleansing. Independently, the inner core promotes mechanical cleaning. www.bluechews.com

Hypoallergenic treats for pets

Hill's Prescription Diet Hypoallergenic Treats Canine and Hypoallergenic Treats Feline are designed for pets with allergies and sensitive skin. According to the company, the treats help eliminate the potential for adverse reactions to foods, as they contain hydrolyzed proteins. Additionally, the canine treats support skin barrier function and nourish the skin and coat with antioxidants and omega fatty acids. The canine and feline treats are sold exclusively through veterinarians. www.hillspet.com





Wellness for canine health

Wellness Core dog food is based on the raw feeding philosophy. According to the company, the kibble is grain-free, using ingredients like deboned turkey and chicken, turkey and chicken meal, vegetables, oils, fruits and botanicals. Wellness Core is available in two varieties: Original Formula and a Reduced Fat Formula, both in 4, 12 and 16 pound bags. www.wellnesspetfood.com

Holistic dog food with lamb

Halo, Purely for Pets offers Spot's Stew "Luscious Lamb Recipe" for dogs sensitive to chicken. Made from human-grade lamb muscle meat and prepared in USDA-approved kitchens, according to the company, the holistic dog food includes no chemicals or by-products. www.halopets.com



Dog treats pack a meaty bite

Plato treats are over 90% meat, made in the US and with all-natural ingredients, according to the company. The strips are now available in 6 ounce packages in four varieties: Natural Salmon, Organic Chicken, Natural Duck and Free-Range Kangaroo. www.platopettreats.com

Munchies use hemp meal

2-Chomp Munchies and NuHemp Munchie Plus from KicX Nutrition feature hemp meal, which is a whole-food, gluten-free vegetable protein powder, according to the company. The Munchie Plus holistic line is available in Crunchy Peanut Butter and Luscious Liver & Cheese, and is meant to target canine health issues. The 2-Chomp Munchies are available in Roasted Turkey with Cranberries, Luscious Liver & Cheese, Crunchy Peanut Butter Maple, Crunchy Peanut Butter Banana and an Assorted package. www.nuhemp.com



Menu CEO talks recalls

Paul Henderson calls for industry-wide cooperation and action

BY TIM PHILLIPS

Henderson thinks it is wrong to characterize the melamine and related compounds (MARC) recall as a failure of supplier quality programs.

Over the past six weeks, I had the opportunity to question Menu Food's CEO Paul Henderson about the petfood recalls. Excerpts from our first interview appeared in the August issue of *Petfood Industry* (Editorial Notes, "Rebuilding Menu"). For the entire interview, go to www.petfoodindustry.com/menuq&a.aspx. Following are more of Henderson's answers, including ones to follow-up questions.

Why baffled?

Why was the entire petfood industry baffled by the inclusion of melamine and related compounds in petfood ingredients? The Chinese have reportedly been adding melamine to plant protein products for several years. Who should have checked up on these Chinese suppliers?

Henderson: At the recent Global Food Safety & Quality Conference, Dr. David Acheson, assistant secretary for food protection at the US Food and Drug Administration (FDA), said, "Melamine was an out-of-the box risk FDA had not thought about. There was not even a definitive analysis measure for melamine." We at Menu were also unaware of any reports that melamine or related compounds were suspected as a component to the vegetable pro-

Business Basics

Corporate headquarters: Streetsville, Ontario, Canada.

Brands: Menu is the leading North American private-label and contract manufacturer of wet petfoods sold by supermarkets, mass merchandisers, pet specialty retailers and other retail and wholesale outlets.

Officers: Paul Henderson, president and CEO; Mark Wiens, CFO; Dr. Richard Shields, EVP technical services; Christopher Mifflin, EVP operations; Randall Copeland, EVP sales and marketing; William Grant, EVP corporate purchasing and logistics.

Plants: Streetsville, Ontario, Canada; Pennsauken, NJ, USA; Emporia, Kansas, USA; the plant in North Sioux City, South Dakota, USA is being sold to Mars Inc.

Sales in 2006: US\$356 million.

Employees: 924.

Website: www.menufoods.com.

teins used by the human or petfood industries. Since the incident, Menu no longer sources vegetable proteins from China, and we test all vegetable proteins for melamine.

It is wrong to characterize the melamine and related compounds (MARC) recall as a failure of supplier quality programs. It was the result of a fraudulent act by Chinese suppliers that no one could have anticipated.

Mars' intentions

Given Mars recent tendency to purchase companies recovering from a major setback, has Mars shown interest in purchasing Menu?

Henderson: On August 9, 2007, Menu announced that we entered into agreements to release Mars from certain contractual obligations to purchase product from Menu and to sell Mars our production facility in North Sioux City, South Dakota, USA. We believe this is in the best interests of our company and our unit holders. Going forward, we will meet our expected customer demand through our three remaining facilities. Menu will receive a total of US\$26.3 million under the terms of these transactions, which will be used to reduce indebtedness with secured lenders. The release is effective immediately, and the plant sale is expected to close about October 1, 2007.

The MARC recall affected as many as 11 petfood manufacturers and is a watershed moment in the petfood industry.

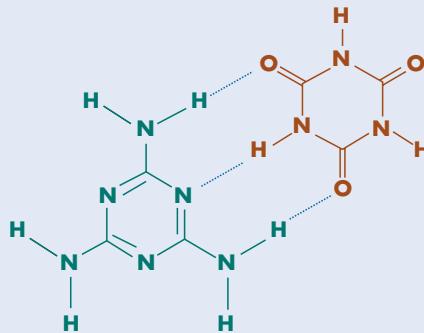
Greed and melamine

Melamine is a nitrogen-rich chemical that Chinese wheat gluten suppliers added surreptitiously to foods to make them look higher in protein than they really are. Melamine is polymerized with formaldehyde to make melamine resin (melamine formaldehyde is frequently called melamine, although it is not the same). Crystallization and washing of melamine generates a considerable amount of waste water, which is a pollutant if discharged directly into the environment. The waste water is often concentrated into a solid for easier disposal.

This solid waste by-product of melamine synthesis is what has been referred to in news stories as "melamine scrap" and is the melamine rich substance added to the Chinese wheat gluten that wound

up in petfood. This scrap is mainly melamine (70%) but contains a significant amount of the oxytriazines, among them, cyanuric acid. One of the leading theories of how pets were harmed is related to this combination of melamine and cyanuric acid. It's known that melamine and cyanuric acid can form networks of hydrogen bonds, creating a tile-like planar structure through molecular self-assembly. Evidently, these two relatively non-toxic materials when combined can interfere sufficiently with kidney function to produce the pet deaths.

Apparently, the corrupt Chinese manufacturers got too greedy. They went from substituting melamine for protein to substituting the much cheaper melamine scrap for protein and big trouble ensued.



Melamine (green) and cyanuric acid (red) easily form hydrogen bonds (blue dotted lines) with each other. Melamine and cyanuric acid can form networks of hydrogen bonds, creating a tile-like planar structure through molecular self-assembly.

Supplier relationships

How has the recall changed your relationships with your suppliers?

Henderson: We are part of a global economic environment where it is common to source suppliers worldwide. Manufacturers all have to heighten our awareness to ensure we work with the best suppliers available. Menu has made changes in our own processes and we suspect that many other companies and industries are doing the same.

The entire industry was affected by the fraudulent acts of the Chinese wheat gluten suppliers. The globalization of the animal and human food supply systems is a fact. But this trend in globalization brings new challenges, requires new safeguards, the resources to implement them and a new determi-

nation to strengthen our controls. Such an initiative demands industry-wide cooperation and action.

I can tell you that Menu Foods no longer sources plant proteins from China and we are actively looking at new US and European suppliers for other ingredients that have been traditionally provided by Chinese suppliers.

Most surprising

What surprised you the most about this entire ordeal?

Henderson: The fraud by the Chinese suppliers was a surprise to the entire industry. No one in this industry suspected melamine. It just hasn't ever happened before and none of the industry standard tests, which we all used, could have detected it. To our knowl-



At Menu's annual general meeting in late June, Henderson got to the melamine issue right away.

edge, no petfood or human food manufacturer had ever tested wheat gluten for melamine prior to this.

As pet owners ourselves, it was difficult. We were very saddened by the events. It is a complex story. The MARC recall affected as many as 11 petfood manufacturers and is a water-

shed moment in the petfood industry.

Media assessment

What's your opinion of the media's handling of the situation?

Henderson: From the moment we announced the first recall, media coverage has been extensive and for a time it seemed almost constant. While there were more than a few instances of erroneous reporting, the fact remains that the coverage did facilitate the publication of all brands affected. This helped pet owners identify and return contaminated products listed in the recall. So that was good.



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Essential communication

From a communications perspective, what are the most important things to do in a situation like the recall crisis?

Henderson: We work to get as much useful information to our customers as quickly as possible. Our direct sales force is made up of industry veterans who understand the importance of trust between customer and supplier. With the support of our technical staff, they worked with our customers to understand and implement the recall and then to explain in detail to our customers and potential customers our quality assurance efforts. We are dedicated to getting the word out that we are producing products with industry-leading quality.

Online extra!

For the entire interview, go to www.petfoodindustry.com/menuq&a.aspx.

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Besides natural, organic and raw or fresh petfoods, consumers are turning to products with ingredients that are locally grown or at least US-sourced.

Selling safety



Consumer concern creates opportunity for marketers of homegrown, alternative petfoods

BY DAVID LUMMIS

Although the largest petfood recall ever has ceased making daily headlines as it did from March through May, consumer concerns over the safety of the US food supply remain at an all-time high and will continue to transform the petfood market. Some of this concern is warranted, and much of it reflects a new-found public awareness of just how closely intertwined the human and animal food supplies are.

The melamine implicated in the pet deaths was also found in protein ingredients commonly used in human foods, including bread, cereal, pasta and veggie burgers. And it was consumed by more than 150,000 hogs and broilers, which were eventually released for processing and human consumption. This joint decision by five US federal agencies was based on tests confirming that the meat was safe, although the Food and Drug Administration (FDA) and US Department of Agriculture called for additional scientific analysis.

Melamine aside, US consumers have reasons to worry. These in-

clude *E. coli* infection of spinach and *Salmonella* infection of peanut butter in the past 12 months and limited FDA staff and funding. (For “10 reasons to be spooked,” go to www.petfoodindustry.com/foodsafety.aspx).

You get a potential brand shift of US\$1.3 billion to US\$4.3 billion.

A wakeup call

Prior to the petfood recall, most Americans were unaware of the alarming state of affairs with food safety. Apparently, not even frequent contamination or infection of human food products was enough to warrant major media coverage, making the amount of attention the petfood recall received all the more remarkable.

Even as the media was chowing down on the recall tragedy, the US public tuned in in surprising numbers. During the week ending April 30, 2007, nearly three in 10 Americans (28%) followed the petfood recall “very closely” while another 17% said it was the single news story they followed more closely than any other, according to the Pew Research Center. Only the Iraq war attracted more public interest.

For years, pet industry insiders have been claiming a sea shift in the human-pet relationship. If this doesn’t affirm the intensity of emotion, nothing will. Despite the horrific circumstances of the recall, for petfood manufacturers able to rise to the occasion, this high interest level may turn out to be a positive and bellwether of things to come.

For example, Packaged Facts’ June 2007 report, *Product Safety and Al-*

Online extra!

For more on why consumers are concerned about food safety, visit www.petfoodindustry.com/foodsafety.aspx.

ternative Pet Foods: *North American Market Outlook*, speculates that billions in petfood retail sales may be in play as consumers consider switching brands. The estimate derives from recent surveys showing the number of pet owners who've said they are open to switching, which ranges from 8% in a GfK Custom Research North America study to 27% in one by the Pet Food Institute. If those percentages are applied evenly to 2006 North American petfood sales of US\$16 billion, you get a potential brand shift of US\$1.3 billion to US\$4.3 billion.

Packaged Facts believes those billions could soon be going toward purchasing alternative products such as natural and organic, raw/frozen, refrigerated and homemade petfoods, as well as other categories explained below. Indeed, such movement may have already started (see Figure 1).

Knee-jerk reaction: no China

Addressing the primary food import concern raised by the recall, one knee-jerk reaction is "China-free." This makes sense in some cases, such as in eliminating suspect China-sourced ingredients. Petfood makers including Menu Foods and Mars division Royal Canin USA are, for example, either cutting back on ingredients from China or phasing them out altogether. Menu says

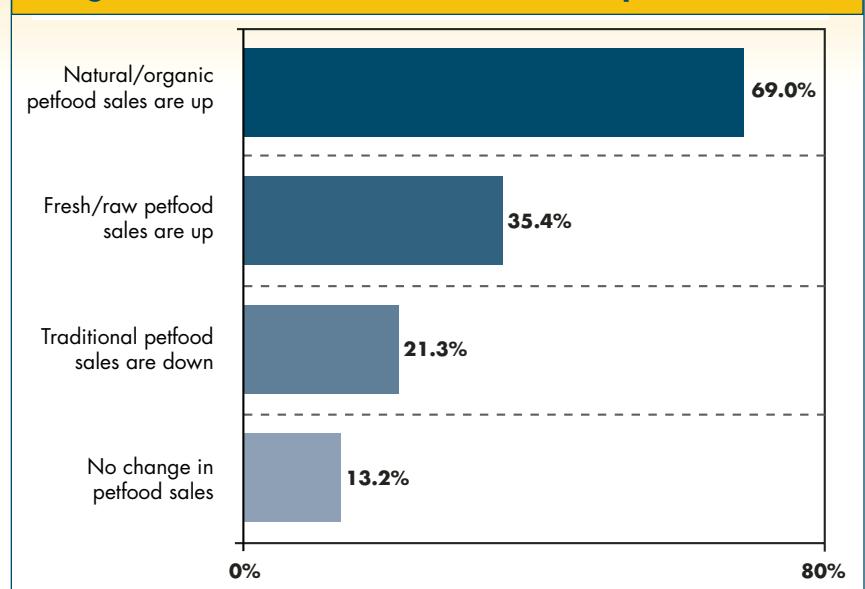
it won't resume using them until the company and the world community are assured they are safe.

In fairness, China isn't alone in turning out below-par foodstuffs, and in most countries, executing food safety officials for putting the public at risk (which recently happened in China) isn't an option. Plus, Chinese-made ingredients are now so ubiquitous in the US food supply that any form of scal-

ing back without causing serious trade disruptions would take years. But, the fact that the China-based addition of melamine and other toxic ingredients to ingestible products has been part of a deliberate and widespread pattern is enough to give any consumer pause.

In the short term, therefore, consumers concerned about the health of their pets and families may respond to label claims like "safe" and "China-free,"

Figure 1: How the recalls have affected petfood sales



In May *Pet Age* magazine surveyed 319 pet specialty retailers on how the recalls affected petfood sales in their stores. (The percentages do not total 100 because respondents were allowed to choose more than answer.) Reprinted by permission from *Pet Age*, September 2007.

- > General animal food
- > Pet food
- > Pet snacks, Treats
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which, until the new mandatory country-of-origin food labeling regulations kick in (see sidebar), may be the next best thing. Even the often seen “made in the USA” doesn’t ensure product safety since, for example, that Sara Lee bread you may have toasted this morning contains ingredients (vitamin supplements)

from China.

One company betting on positive consumer response is Food for Health, based in Orem, Utah, USA, which says its products are made from organically grown foods processed and packaged in the US without chemical additives. Its new labeling plans call for “safe” and

“China-free” stickers on human and pet supplements, including its Healthy Dog line.

100% US-sourced ingredients

In light of the petfood recall and the pending country-of-origin labeling, the Packaged Facts report predicts that “100% US-sourced” will emerge as a key petfood market positioning in the coming months, especially among alternative products like organic and raw foods. After the recall, Newman’s Own Organics spent weeks researching the source of the ingredients used in its petfood line, and the company recently announced that every ingredient in its products comes from US sources.

Ninety percent of the ingredients used in North Hollywood, California, USA, based Artemis Pet Food Company’s human-grade products are US-sourced, with the rest coming from

Country-of-origin labeling

Mandatory country-of-origin labeling is on the way for food products sold in the US, though not without controversy. Originally set to go into effect in 2004, implementation of the new law was repeatedly pushed back by the formerly Republican-controlled US Congress, most recently until 2008. In early 2007, however, the newly empowered Democrats introduced legislation to move the deadline back up a year, and in July 2007 the House Agriculture Committee voted to require country-of-origin labels on meats starting in 2008.

This is not just a partisan political issue. Overwhelmingly, US consumers want to be informed about where their food comes from. In a *Consumer Reports* survey of more than 1,000 Americans conducted in June 2007, 92% said they wanted to know which country produced the food they are buying. Many also said they’d like the choice of buying products made with ingredients sourced only in the US, since food imports can no longer be assumed safe.

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Canada (7%) and New Zealand (3%), according to the company. Sales for this \$20 million business have soared by 25% to 50% as a result of the recall, even though its dog food costs nearly three times as much as the average bag of supermarket petfood.

Going local

Packaged Facts also predicts much stronger interest in products made from locally grown ingredients. Human-grade organic petfood producer Ewanger's, whose business has surged as a result of the recall, buys all its ingredients locally, most of them within 40 miles of its plant in Wheeling, Illinois, USA. In an interview with the *Chicago Tribune* (May 28, 2007), company vice president Joel Sher said that buying locally has taken on much greater importance since the recall. "You've got to know your suppliers and the kind of people they are. With the local ones, you can know as much as you want to know. You can visit them."

Packaged Facts' expectations for "locally grown" as a potent petfood sales proposition is not based solely on the recall. Trends in the petfood market don't just follow human food trends, they often do so at accelerated rates, and the trend toward locally grown is in full swing on the human side.

In its May 2007 report *Fresh and Local Foods in the US*, Packaged Facts conservatively estimates that locally grown food could be a \$7 billion business by 2011, up from its current level of about \$5 billion. This optimistic forecast is based on trends including the rapid growth of farmers' markets, consumer perceptions that locally grown products are tastier and healthier, consumers' growing desire to support their local economy and corporate support for sustainable agriculture. ●

David Lummis is senior pet market analyst for Packaged Facts. Contact him at Tel: 1+240.747.3000, editor@packagedfacts.com, www.packagedfacts.com.



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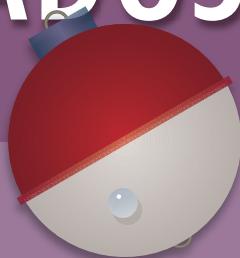
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Genetic tools will be important in determining nutrient requirements, testing novel ingredients and developing nutritional therapies.

Genetic tools can boost palatability

Creating chemicals that evoke or block olfactory and taste sensations in the dog

BY TIM PHILLIPS, DVM

"Several petfood companies are now looking at how dogs respond genetically to a particular diet. They do so by profiling genes that are turned on and off in response to the diet in question." That's according to Keith E. Murphy, PhD who spoke at Petfood Forum 2007 on the topic, "The impact of genetics and genomics on research concerning palatability."

Murphy is professor of genetics, pathobiology and biotechnology at Texas A&M University, College Station, Texas, USA. His laboratory studies the domestic dog with the goal of improving the dog's health and quality of life via increased understanding of canine genetics. His research also serves as models for study of certain human hereditary diseases as well as aging in humans.

Smelling is believing

"For the dog, palatability is about smell," says Murphy. "Several studies

have shown taste plays very little role in the choice of food for the dog. The dog enjoys food through its olfactory sense, which is deeply rooted in its basic genetic composition."

The National Institutes of Health (NIH) has a large program that studies taste and olfaction. In 2004, NIH spent US\$55 million to sequence the canine genome.

Thus we now know every chromosome in the dog and what genes are on what chromosomes.

"We are able to start dissecting any

trait we wish," notes Murphy. "We are starting to understand the genetic basis for complex behaviors such as olfaction and taste." This is of critical importance to pharmaceutical companies and petfood companies, because compliance is much better if their therapeutic products are palatable.

As for cats, Murphy points out that our understanding of feline genetics lags behind that of the dog, but there has been progress. In August 2006, several labs studying feline genetics presented papers at the third international conference on "Advances in canine and feline genomics and inherited diseases," at the University of California Davis.

Genomic technology

"Genomic technology enables less invasive and more informative research that may some day result in petfoods formulated for specific genotypes," according to Kelly S. Swanson, PhD, assistant professor of animal and nutritional sciences at the University of

Compliance is much better if their therapeutic products are palatable.

Illinois. Genomics is the branch of genetics that studies organisms in terms of their genomes (their full DNA nucleotide sequences).

Functional genomics, the study of assessing gene function, is of major importance. If applied correctly, nutritional genomics will enhance our understanding of metabolic pathways and aid in maximizing the nutritional and health status of the dog and cat.

Gene expression profiling also may aid in efficacy and toxicity testing of functional ingredients that have become very popular in petfoods. Mechanisms of action, optimal inclusion levels and toxicological effects of most functional ingredients are not completely under-

stood, especially in dogs and cats.

Pharmaceutical companies already are heavily involved in the development of genotype-specific products for precise treatment of disease. However, if genotype-specific diets are formulated that result in decreased incidence of disease, pharmaceutical use can be

minimized. Populations with the most to gain from the development of genotype-specific diets are those highly susceptible to disease or those already diagnosed with a disease.

“These tools,” says Swanson, “will be important in determining nutrient requirements, testing novel ingredients

Tasty medicine

Even a miracle drug is useless if your pet won't take it. Hence, Wedgewood Pharmacy has introduced the Gourmeds compounding service for companion-animal veterinarians and the people who struggle with giving medications to their pets. This new service provides the compounded preparations that veterinarians prescribe frequently in chewable, naturally flavored tablets that are easy to administer—and tasty as a treat. The service uses the same chicken and fish meals that are used as palatants in leading-brand petfoods.



Gourmeds are currently available to prescribers in six commonly prescribed pet medications: cisapride, metronidazole, diethylstilbestrol (DES), methimazole, pergolide and trilostane. And, there are other companies that offer this service.

Wedgewood Pharmacy is the largest veterinary compounding pharmacy in the US, serving more than 20,000 prescribers of animal and human compounds. It is located in Swedesboro, New Jersey, USA. Contact Marcy Kelly at mkelly@wedgewoodpharmacy.com.

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and developing nutritional therapies used to prevent and treat diseases.”

New tools

“Genomic tools have provided extensive information about the DNA sequences that encode odor, taste and irritant receptors,” according to Nancy E. Rawson, PhD, at the Monell Chemical Senses Center. We now have tools to identify and characterize the molecular binding sites in the receptor proteins responsible for sweet, bitter and meaty (umami) sensations—basic tastes sensed by specialized receptor cells on the human tongue.

Expressing these receptor proteins in high throughput assay systems permits screening candidate flavors in much the same way pharmaceutical companies screen for active pharmaceuticals. Yet this approach has proven far more challenging than expected

Canis familiaris is an excellent model for genetic research because the species has wide phenotypic diversity, closed breeding populations and good medical surveillance. The dog and human are perfect synergistic models—when one species benefits the other does also.



It is likely that there will be significant breed differences in flavor perception.

and few commercial applications have been forthcoming.

Based on studies of evolutionary genetics, it now appears that chemosensory receptor genes evolved to be more susceptible to mutation than other types of physiologically important genes. This feature would be an advantage to the species as it would increase the ability of the population to detect and discriminate a wider variety of chemicals in their environment. The more information available to use in learning friend from foe, food from toxin, potential mate from relative, the more likely the population is to survive in a changing environment.

Ultimately, it may be possible to

design petfoods targeting the taste/odor perceptual abilities of individual breeds. In view of the evolutionary importance of chemosensory ability, it is likely that there will be significant breed differences in flavor perception that will become more pronounced over successive generations.

These tools will permit the design of flavor chemicals that improve palatability by evoking, enhancing or blocking particular qualities.

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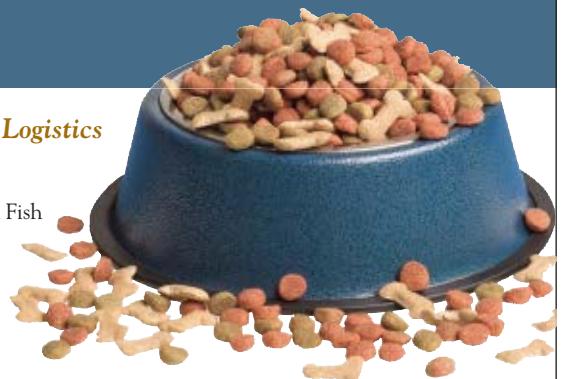
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Laboratory	Nutrient analysis	Nutraceutical analysis	Microbiological assays	Drug/antibiotic/pesticide residues	GMO/organic screens	Mycotoxin screening	Melamine testing	Antioxidant testing	Mineral analysis	Fatty acid profiles	Palatability	Complete & balanced claims (AAFCO trials)	Digestibility/bioavailability	Urine pH	Food safety	Quality	Dental studies	Other
A&A Laboratories	x		x			x			x									
A&L Analytical Laboratories Inc.	x	x	x															
ABC Research Corp.	x	x	x	x		x	x	x	x	x					x			Problem solving
Adolf Lutz Institute	x		x			x												
AFB International											x							Feeding trials for dry petfoods, semi-moist products and canned products
Agland Marketing Inc.																		Other
Allpax Products LLC															x	x		FDA process filings, thermal process establishment, deviation analysis, temperature distribution
Alpha MOS	x	x																
Ameri-Pac Inc.								x										Peroxide value, aldehyde, alkenal, oxygen bomb, OSI
Andres Pinaluba SA			x	x		x												
Ashland																		Other
Barrow-Agee Laboratories Inc.	x		x	x		x												
Biomin GTI GmbH						x												
Blue Ridge Kennel											x							
Caraster Inc.																		Other
Carolina Analytical Services LLC	x		x	x		x	x	x	x	x								
Central Testing Labs LTD	x		x	x		x			x	x					x	x		
Cornell University - NEAS	x			x		x												Amino acid profiles
Cornerstone Laboratories LLC	x			x			x	x	x	x								Sudan dye testing
Craft Technologies Inc.	x	x																Plasma and urine analysis for bioavailability studies
Dairy One	x																	
Diversified Laboratories Inc.	x			x			x			x					x			
Eclipse Scientific Group	x			x		x												
EnviroLogix																		Other
Eriez Magnetics																		Other
ESE & Intec China	x											x						
Eurofins GeneScan	x	x	x	x	x	x					x	x	x	x				
Eurofins Scientific Inc.	x	x	x	x	x	x	x	x	x	x			x		x	x		Rancidity testing, peroxide value
Exopack LLC																		Other
Exquim SA																		Other
Farmer S.p.A.	x					x												Amino acid profiles
Food Safety Net Services	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	Various, inquiries welcome
Food Technology Institute	x					x												
GeneScan USA	x		x	x	x													
Genetic ID					x													
Great Lakes Scientific Inc.	x		x	x		x			x	x								
Harlan Sprague Dawley Inc.																		Other
Holmes Laboratory Inc.	x		x			x			x									Water suitability
Industrial Laboratories of Canada Inc.	x		x	x		x			x	x					x	x		Vitamin assays
Integrated Biomolecule Corp.	x	x	x	x			x	x	x	x								
Iowa Testing Laboratories Inc.	x																	
Kansas State University			x	x		x								x				Pathology, bacteriology, serology, toxicology, parasitology and rabies
Kennelwood Inc.											x	x	x	x	x			Stool quality, treats

Laboratory	Nutrient analysis	Nutraceutical analysis	Microbiological assays	Drug/antibiotic/pesticide residues	GMO/organic screens	Mycotoxin screening	Melamine testing	Antioxidant testing	Mineral analysis	Fatty acid profiles	Palatability	Complete & balanced claims (AAFCO trials)	Digestibility/bioavailability	Urine pH	Food safety	Quality	Dental studies	Other
KGK Synergize Inc.		x						x	x						x		x	Rodent bioavailability, toxicology models, atopic dermatitis in vitro
Koffolk Ltd.	x			x		x												
Lab Tec Analises Quimica LTDA	x		x	x		x	x	x	x	x								
Lareal	x	x		x	x	x												In vitro digestibility
Lipid Technologies LLC	x	x								x								
Lonza Inc.																		Other
Masterlab	x		x			x												Amino acid profiles, other
Medallion Laboratories	x		x			x	x	x	x	x								Shelf-life and sensory evaluations
Microbac - Friend Laboratory	x	x	x	x	x	x												
Microbac Laboratories Inc.	x	x	x	x	x													
Midwest Laboratories Inc.	x		x	x		x	x		x	x						x		
Mocon Inc.																		Other
Mother Murphy's Laboratories											x							
NP Analytical Laboratories																		Other
Neogen Corp.			x		x	x												
New Jersey Feed Lab Inc.	x		x						x									Fat-by-acid hydrolysis testing, peroxide value, ethoxyquin and proximate
Nutrition Laboratory, Massey University	x	x	x	x		x												
Ontario Nutri Lab Inc.	x										x	x	x	x				
Panelis											x							
Peterson Co.																		Other
Petfood Ingredients Inc.																		Other
Pet Food Solution Inc.	x		x				x	x	x	x	x	x	x	x	x	x	x	Full amino acid profiles, problem solving, product development
Precision Analytical Laboratories	x		x	x		x								x				
Preference Technology Inc.											x							
Previmex SA	x		x			x							x	x				
Prince Agri Products Inc.	x					x							x					Ingredients/premixes, mixer evaluation studies
Provimi B.V.											x	x	x	x	x		x	Acceptability
Romer Labs Inc.	x		x			x			x									
Rotronic Instrument Corp.																		Other
Safest, a Division of MP Biomedicals						x	x								x			
SDK Laboratories	x		x	x		x						x	x					
Selko BV																		Additives
Senso											x							
SGS North America Inc.	x															x		Fat content, peroxides, FFA, alkenals, malonaldehydes
Sherburne Pet Food Testing Center											x							
Shuster Laboratories Inc.	x		x	x	x	x		x	x	x								
Silliker Inc.	x	x	x	x		x									x	x		
Southern Testing & Research Laboratories	x	x	x	x		x												
Specialty Enzymes																		Other
Summit Ridge Farms											x	x	x	x	x		x	
T&E - Analytical	x																	
Tasqa Servicios Anliticos Ltda.			x	x	x	x												
Technology Lab	x																	
TNO Nutrition and Food Research											x	x	x	x	x		x	Blood level protocols, weight loss protocols, customized protocols (upon request)
Trilogy Analytical Laboratory		x			x	x												
Trouw Nutrition USA LLC																		Other
University of Brasilia																		Amino acid profiles
University of State of Sao Paulo				x														
Vicam L.P.			x			x												
Warren Analytical Laboratories Inc.	x	x	x	x	x	x							x					Additional studies available
Wenger Manufacturing Inc.																		Other
Wysong Corp.																		Other



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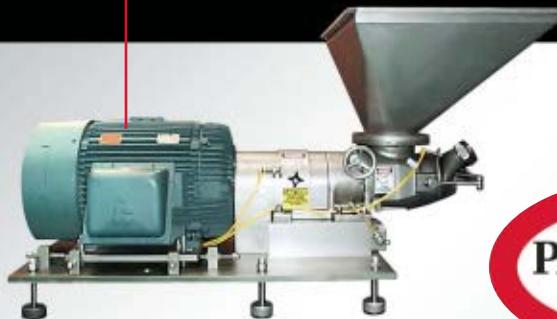
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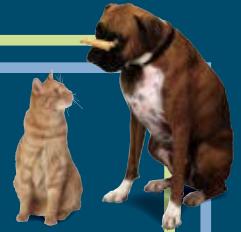
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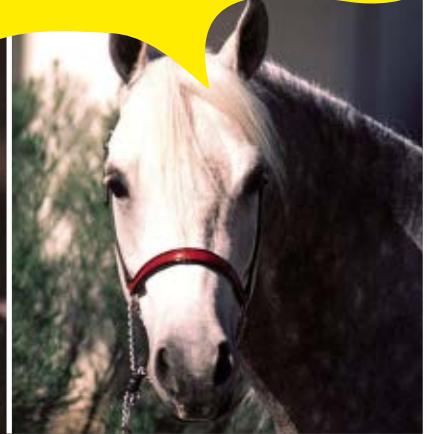


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How will canine weight loss drug affect our market?

During the 2007 Forum of the American College of Veterinary Internal Medicine in Seattle, Washington, USA, I attended some interesting presentations regarding a new drug for weight control in dogs (Kirk *et al.*, 2007). Slentrol (dirlotapide), a microsomal triglyceride transfer protein inhibitor, was approved in the US for management of canine obesity in February 2007. A similar drug (Yarvitan) has been approved in Europe.

While Slentrol is a welcome addition to the arsenal to fight canine obesity, it is not a panacea, and traditional methods of calorie control via dietary modification still will be required.

How does it work?

Briefly, dirlotapide partially blocks the proteins in the cells lining the intestine that are responsible for transfer of fat molecules into the body, thus keeping those proteins from working efficiently. In other words, the fat molecules get into the intestinal cell but can't get out as easily. This buildup of fat in the cells then triggers a hormone that tells the brain, "I'm full." The result is the dog is not as hungry as usual and simply eats less.

Appetite suppression accounts for approximately 90% of the drug's function. The rest is due to the normal sloughing and replacement of the intestinal lining cells. The sloughed fat-laden cells are then excreted in the feces, resulting in a loss of some of the fat that would normally have been absorbed into the body. However, this is not as extreme an effect as that from drugs that simply block absorption of fats from the intestinal lumen or from foods made with

Is this the demise of "lite" petfoods?

—David Dzanis



nondigestible fats (e.g., olestra), where oily feces reportedly could become a problem.

How is it used?

A veterinarian must examine the dog to determine health and suitability for treatment. Slentrol is not recommended for dogs with liver disease or on long-term corticosteroid treatment and has not been studied in dogs under 1 year of age or those that are breeding, pregnant or lactating. While reported side effects are mild and often resolve over time, there may be cases where continued use may not be advised. It is strongly cautioned not to use this drug in cats or people, as potentially very serious side effects could occur.

An initial dose is determined, which is adjusted periodically to achieve

an effective but safe rate of weight loss. During this treatment phase, the dog's regular food does not need to be changed to a "lite" or lower calorie food. In fact, the presenter considered it ill-advised to switch diets; the ideal is to allow the drug to do its work without other alterations in the dog's routine.

After the dog has reached the desired weight, though, the weight management phase is critical. This is because once the drug is discontinued, the dog's appetite will return with a vengeance. Thus, rebound weight gain can be a considerable problem if the dog is not adjusted to a more fitting calorie intake pattern before the drug is withdrawn.

Impact on the industry

It's during the management phase (recommended three months minimum) of use of dirlotapide that dietary choices, food quantities and exercise regimens appropriate to maintain proper weight must be determined. Lesser amounts of the same food as fed previously may suffice, but in many cases a lower calorie dog food may be a better choice for long-term benefit and pet satisfaction.

This does not have to necessarily be a lite or even "less calorie" food, though. There are many foods intended

The fat molecules get into the intestinal cell but can't get out as easily.

for maintenance of adult dogs that may be suitable alternatives. The market is replete with products bearing claims for weight management or control, but since they circumvent the current Association of American Feed Control Officials (AAFCO) regulations requiring calorie content statements for lite and less calorie foods, that information most often does not appear on the label. I believe this greatly diminishes the choices dog owners have to select and use an appropriate food.

Fulllest potential benefit

As previously discussed in this column, the American College of Veterinary Nutrition (with me as its representative in front of AAFCO) has proposed changes to the Model Pet Food Regulations to require calorie content statements on all dog and cat food labels. The fate of this proposal has not been determined as of this time (see p. 8), but it is my opinion that if passed by AAFCO, it would help pet owners and veterinarians tremendously in choosing the most appropriate food for the management phase and eventually post-treatment. More importantly, it would help in using the chosen product to its fullest potential benefit.

Successful weight maintenance benefits not only the dog and its owner but ultimately the petfood industry as a whole. Consumers will be happier with the performance of products, translating to repeat sales.

In any event, limited calorie petfoods will continue to have a purpose on the market. Some dogs (and all cats) will not be able to take the drugs presently approved, and it's doubtful that will change in the near future. Even for dogs that do achieve weight loss through dirlotapide or similar agents, the need for calorie controlled diets will remain if long-term success is to be anticipated. ●

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Ingredients as nutrient delivery devices

Companion animal researchers and industry professionals gathered recently at the annual American Society of Animal Science meeting in San Antonio, Texas, USA, for research presentations/posters and a companion animal symposium entitled “Ingredients as nutrient delivery devices.” Here are highlights from the symposium.

Research limitations

Dr. George Fahey Jr. of the University of Illinois provided a comprehensive overview of the methodologies available to companion animal researchers. As part of his conclusions he emphasized two main limitations.

The first, while not addressing a method in and of itself, is the lack of a comprehensive, accurate, up-to-date nutrient database for the various ingredients used in companion animal diets. He noted that the last real nutrient database was published more than 25 years ago, and the current National Research Council publication does not, by design, fully cover the topic. It is unlikely the situation will change any time soon as none of the governmental or nongovernmental entities have expressed any interest.

The second major limitation is the virtual moratorium on invasive testing on dogs and cats. Evaluating the metabolic impact of various dietary ingredients becomes impossible in these situations, and applying results from other species is a guess at best.

Anti-nutrients in ingredients

Issues regarding anti-nutrients in petfood ingredients were addressed

A valuable exchange of new science and information from around the world of companion animals.



— Greg Aldrich

by Dr. Chris Grieshop of P&G Petcare. These anti-nutrients are not to be confused with the issues the petfood industry currently faces with man-made “economic” adulterants (e.g., melamine).

A staggering array of naturally occurring toxins and non-nutritive compounds are found in various ingredients commonly used in petfoods. These include pathogenic bacteria, protease and trypsin inhibitors, biogenic amines, various mycotoxins and heavy metals.

Other intrinsic factors may also

affect metabolism, such as bioflavonoids in soy products, thio-sulfur compounds in onions and numerous others. Unfortunately, the many lists of “poisonous plants and food items” found in reference texts and on the web are often based on anecdotal reports, case studies and extrapolation from other species. Much of this information has not been fully substantiated.

Changes to protein meals

On the protein front, Dr. Ross Hamilton of Darling International shared several interesting statistics. He noted that in the US more than 52 billion pounds of animal co-products are rendered annually, and the amount is increasing. Part of the reason for this growth is that for every pound of meat the US consumer eats today, there is 1 pound of waste product produced. This is partially because people are eating less of the otherwise edible organ meats such as livers, hearts, tongues and tripe.

The meat industry’s loss could become the petfood industry’s gain—that is, if consumers will allow it in their pets’ food. Hamilton provided numerous examples of how the mix of raw

The last real nutrient database was published more than 25 years ago.

materials in the production of protein meals can have a substantial impact on the composition and utilization of the final diet.

Because of changes in the meat industry, traditional protein meals, like meat and bone meal or chicken by-product meal, have changed dramatically over the last several years. Thus, reference information from the early 1980s may now be obsolete, further justifying updates to reference databases and possibly new consumer-friendly names more indicative of the changes in the raw materials.

Retarding oxidation of lipids

On the fat side of the animal and vegetable front, Dr. Rob Brannon of Ohio University spoke on the fundamental chemistry of lipid oxidation, how it can affect animal health and provided some input on methods to retard oxidation.

Beyond chemical antioxidants, Dr. Brannon noted that in a triglyceride, the location of the unsaturated fatty acid can have an influence on the susceptibility of that fat to oxidation. Further, work from his lab and others has shown that oxidation can be affected by a surface phenomena in which clusters of triglycerides called a reverse micelle allow the fat to “turn its back” to the attack by oxidants or free radicals.

Another interesting point was that, contrary to dogma, very low water activities ($A_w < 0.2$) may actually be protective of fats. He cited the example of beef jerky in which a very dry, low water activity product remains very shelf-stable for extended periods.

Inorganic vs. organic trace minerals

Rounding out the presentations, Dr. Lee Southern of Louisiana State University evaluated the literature on

farm and companion animal species to determine whether it was better to use inorganic or organic trace minerals. He noted that most experiments feed both the inorganic and organic forms in combination and not individually.

Because of this mixed data from animal studies, direct support for organic minerals as more bio-available and functional are hard to come by. However, that should not be interpreted to mean that organic minerals are no better than inorganic minerals. It may simply mean that researchers need to focus more specifically on direct comparisons and to determine these responses against the proper response criteria.

Looking to Indianapolis in 2008

For more information about the symposium or a copy of any of the 19 abstracts submitted for scientific presentations, go to <http://adsa.psa.ampa.asas.org/meetings/2007/> or any of the

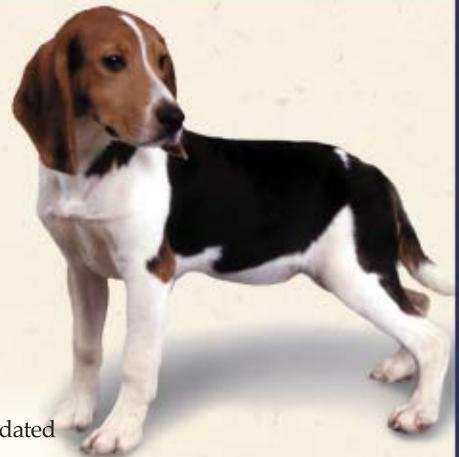
member societies.

Next year the meeting will be held July 7-11 in Indianapolis, Indiana, US, and no doubt will prove to be another valuable exchange of new science and information from around the world of companion animals.

If you are interested in submitting an abstract or poster for next year's meeting, check <http://adsa.psa.ampa.asas.org> frequently for its call for abstracts and electronic submission information. No deadlines have yet been announced, but for this year's meeting, submissions were due in mid-February. ●

Dr. Greg Aldrich is president of Pet Food & Ingredient Technology Inc., which facilitates innovations in foods and ingredients for companion animals. Tel: +1.785.271.0238, aldrich4@cox.net.

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Crisis drives growth in alternatives

The alternative petfood segment has embraced the crisis arising from the petfood recalls earlier this year. Expectations for the health of the segment is that it could realize double-digit growth over the next couple years as consumers' negative perceptions about the safety of traditional mass-produced foods drive down sales of those products.

A significant volume and dollar share opportunity now exists as a result of the recall crisis. According to Packaged Facts, this is a highly emotional issue for many petfood manufacturers,



A significant volume and dollar share opportunity now exists

—Huntley Manhertz Jr.



as potential brand shifting in the market might happen as a result of consumers seeking safer, higher quality foods for their pets.

The introduction since June 4 of

38 new petfood products claiming “no wheat” on their labels—more than were rolled out in all of 2006—shows just how fast the industry has changed. The main beneficiaries in the brand-switch-



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ing trend will be higher quality petfoods, especially natural/organic, homemade and other alternative types of products, according to Packaged Facts. (For more information, see "Selling safety," p. 24). While many of these alternative brands had significant momentum before the recall, concern over petfood safety stands to boost sales of these items even more.

Veterinary response to homemade petfoods

A quick Internet search lists hundreds of articles touting the benefits of homemade petfoods. But some veterinarians strongly urge pet owners to think twice before preparing their own petfoods.

"I don't recommend that people make their own dog food from household ingredients," says Jim Kramer, DVM, owner of Columbus Animal Hospital PC in Columbus, Nebraska, USA. "It's quite difficult to nutritionally balance the petfood with the proper amounts of vitamins, minerals and trace minerals."

Dr. Kramer says petfoods are, by law,

fortified with the proper balance of nutritional components and are nutritionally sound foods for dogs and cats. He believes there is no reason for pet owners to panic. The use of homemade foods could be especially harmful to young animals with age-specific needs; large breed, fast growing dogs; and animals that require prescription diets, he adds.

Harold Lange, DVM, of A&M Veterinary Clinic, also in Columbus, Nebraska, agrees. "I would recommend sticking to prepared petfoods that have not been incriminated in the recent problem," Dr. Lange said. "Most people already feed small amounts of table scraps to their pets. I would not recommend homemade formulas as this could be more detrimental to the animal's overall health."

Tell us what you think!

Send letters to the editor to editor@petfoodindustry.com or post your comments online at www.petfoodindustry.com

100 years of benefits

An informal survey of veterinary clinics and pet boarding facilities revealed an increased number of calls about the problem and a consensus among veterinarians against homemade petfood or a diet of table scraps. "The truth is, many of the increased medical problems we see are with animals that have too much human food in their diet," Dr. Kramer said. "We have a couple of dozen animals that have died from contaminated petfoods, but no one is talking about the millions of animals that have benefited from prepared petfoods for the past 100 years they have been on the market." ●

Dr. Huntley Manhertz Jr. is a consumer product goods market researcher and an independent writer. He can be reached at Tel: +1.813.699.4682, hmanhertz@yahoo.com.

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Research Notes

Managing weight loss in chronic disease

Cachexia, a loss of lean body mass, is common in companion animals with chronic diseases, such as heart failure, renal failure, hepatic failure and cancer. The weight loss that occurs in cachexia is unlike that seen in a healthy dog or cat that loses weight. In a healthy pet that is not receiving enough calories to meet its requirements, metabolic adaptations allow fat to be used as the primary fuel source. Conversely, in an animal with chronic disease, the primary fuel source is muscle. This muscle loss has negative effects on strength, immune function and survival.

For animals with chronic diseases in which weight loss is a component, practical methods to help owners in manag-

Key Concepts

► Managing weight loss in chronic disease

(Freeman, 2007): A loss of lean body mass is common in pets with chronic diseases. Dietary modification and feeding strategies are often beneficial in improving food intake and quality of life for these animals.

► Dietary therapy of protein losing enteropathies

(Zoran, 2007): In dogs with protein losing enteropathies, a combination of an elemental diet with a hydrolyzed diet or a homemade ultra-low-fat, highly digestible diet may be effective.

► Diet-induced obesity and insulin resistance

(Zhao, 2007): A high fat and sucrose diet (HFSD) induced insulin resistance and increased adipose accumulation in rabbits, suggesting that HFSD-fed rabbits may become a model for research on human insulin resistance and obesity.

ing their pets' appetite are critical to success. This is especially true because anorexia is one of the most common reasons owners decide to euthanize their pets. Dietary modification, assisted

feeding or feeding strategies are often beneficial in improving food intake and quality of life for these patients.

Source: L.M. Freeman, 2007. *Proc. 25th ACVIM, Seattle, WA.*




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Dietary therapy of PLE

Protein losing enteropathies (PLE) in dogs comprise a complex group of gastrointestinal (GI) diseases causing severe loss of proteins from the GI tract. PLE can be a primary disease entity, such as the disorders that occur in certain breeds (Wheaton Terriers and Basenjis), but is most often secondary to a wide variety of diseases of the small bowel. For PLE patients, the selection of an appropriate diet is a challenge.

Following are diseases commonly associated with PLEs:

- ▶ Right-sided congestive heart failure;
- ▶ Neoplasia;
- ▶ Lymphangiectasia (congenital);
- ▶ Secondary lymphangiectasia;
- ▶ Constrictive pericarditis;
- ▶ Foreign body;
- ▶ Food allergy;
- ▶ Infectious enteritis;
- ▶ Inflammatory bowel disease;
- ▶ Systemic lupus erythematosus;
- ▶ Budd-chiari syndrome; and
- ▶ Hyperadrenocorticism.

Nutritional support using elemental diets, amino acid supplements and vitamins must be added or they must be used in combination with another diet. In PLE dogs, a combination of an elemental diet with a hydrolyzed diet or a homemade ultra-low-fat, highly digestible diet may be effective. Elemental diets are liquid diets that attempt to provide all of the nutrients an animal needs.

Source: D.L. Zoran, 2007. *Proc. 25th ACVIM*, Seattle, WA.

Diet-induced obesity and insulin resistance

This study examined whether rabbits fed a diet containing high fat and sucrose could develop obesity and insulin resistance, the major pathophysiological features of metabolic syndrome. Male Japanese white rabbits were fed either a normal chow diet (control) or a high fat and sucrose diet (HFSD) for 36 weeks. Plasma levels of triglycerides, total cholesterol, glucose and insulin were measured. HFSD led to a significant increase in body weight, caused by significantly higher

visceral adipose tissue accumulation. Although there were no differences in plasma triglycerides, total cholesterol, glucose, insulin levels and blood pressure between the two groups, HFSD-fed rabbits showed impaired glucose clearance associated with higher levels of insulin secretion compared to

control rabbits. Results showed that HFSD induced insulin resistance and increased adipose accumulation in rabbits, suggesting that HFSD-fed rabbits may become a model for research on human insulin resistance and obesity.

Source: S. Zhao, et al., 2007. *J of An Physiology and An Nutrition* (OnlineEarly Articles).



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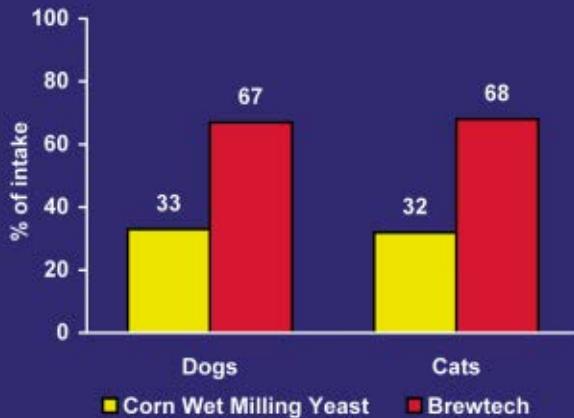


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➤ **National Annual Pet Industry Trade Show**, September 16-17, 2007, Toronto, Ontario, Canada. Contact: Pet Industry Joint Advisory Council – Canada (PIJAC), Tel: +1.613.834.2111, Fax: +1.613.834.4854, executiveoffice@pijaccanada.com, www.pijaccanada.com.

➤ **GLEE/GLEE PETINDEX**, September 16-18, 2007, National Exhibition Center, Birmingham, England. Contact: Adam Ash, Tel: +1.609.921.0222, reg@whitehoundadv.com.

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

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

➤ **Short Course on Aquaculture Feed Extrusion**, September 23-28, 2007, Texas A&M University, College Station, Texas, USA. Contact: Dr. Mian Riaz, Tel: +1.979.845.2774, Fax: +1.979.458.0019, mnraiz@tamu.edu, www.tamu.edu/extrusion.

➤ **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, pet@vnu.com.br, 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, Tel: +1.651.454.7250, Fax: +1.651.454.0766, aacc@scisoc.org, www.aaccnet.org.

➤ **PetExpo**, October 10-16, 2007, Melbourne Exhibition & Convention Center, Melbourne, Australia. Contact: Pet Industry Association of Australia Ltd, Tel: +61.2.9659.5811, Fax: +61.2.9659.5822, 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., Tel: +1.312.663.4040, Fax: +1.312.663.5676, hbacker@hhbacker.com, www.hhbacker.com.

➤ **PFI Annual Meeting**, October 15-16, 2007, Omni Shoreham Hotel, Washington, D.C., USA. Contact: PFI, Tel: +1.202.367.1120, info@petfoodinstitute.org, www.petfoodinstitute.org.

➤ **Aquafeed Euro-Asia 2007**, October 23-24, 2007, Novotel Istanbul, Zeytinburnu, Istanbul, Turkey. Contact: Aquafeed-ID&A, Tel: +32.0.51.31.12.74, Fax: +32.0.51.31.56.75, aquafeed@scarlet.be.

For a complete list of 2007 events, visit
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Send meeting dates to Jessica Taylor Bond at jbond@wattnet.net. Include date, location, contact name, address, phone, fax, E-mail and website.

► **NRA Annual Convention**, October 23-27, 2007, Miami, Florida, USA. Contact: National Renderers Association Inc., Tel: +1.703.683.0155, Fax: +1.703.683.2626, renderers@nationalrenderers.com, www.renderers.org.

► **3rd Kemin Science of Petfood Symposium**, October 24-25, 2007, Paris, France. Contact: Silke Taris, silke.taris@kemin.com, www.kemin.com/petfoods/symposium.

► **China International Pet Show**, November 15-18, 2007, Chinese Export Commodities Fair, Pazhou Complex, Guangzhou, China. Contact: China Great Wall International Exhibition Co. Ltd., Tel: +1.0086.10.68748621, Fax: +1.0086.10.68748993, wangxinyu@263.net, www.cipscom.com.

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► **North American Veterinary Conference (NAVC)**, January 19-23, 2008, Orlando, Florida, USA. Contact: NAVC, Tel: +1.352.375.5672, Fax: +1.352.375.4145, info@tnavc.org, www.tnavc.org.

► **Conference on Pet Food Ingredient Quality**, January 22-23, 2008, Georgia World Congress Center, Atlanta, Georgia. Contact: Jarrod Kersey, American Feed Industry Association, jkersey@afia.org, John Starkey, Poultry Protein & Fat Council, jstarkey@poultryegg.org, www.petfoodconference.com.

► **International Poultry and Feed Expo**, January 23-25, 2008, Georgia World Congress Center, Atlanta, Georgia. Contact: IPE, Tel: +1.770.493.9401, www.ipe08.org.

► **13th International Industrial Trade Fair**, Cereals, Mixed Feed and Veterinary, February 5-8, 2008, All-Russia Exhibition Centre, Moscow, Russia. Contact: Alexandra Zharko, Tel: +7.495.956.41.52, Fax: +7.495.730.19.32, garko@intourist.ru, www.intourist.ru.

► **Global Pet Expo**, February 14-16, 2008, San Diego Convention Center, San Diego, California, USA. Tel: +1.203.532.0000, Fax: +1.203.532.0551, www.globalpetexpo.org.

► **India International Pet Trade Fair**, February 29-March 2, 2008, National Small Industries Corporation (NSIC) Expo Complex, Okhla Industrial Estate, New Delhi, India. Contact: Mr. Binoy Sahee, Tel: 91.989.101.3797, www.iiptf.com.

► **Petfood Forum Asia**, March 5, 2008, Queen Sirikit National Convention Center, Bangkok, Thailand. Contact: Debbie Phillips-Donaldson, Watt Publishing Co., Fax: +1.847.390.7100, dphillips@wattnet.net, www.petfoodindustry.com.

► **Aquafeed Horizons Asia**, March 6, 2008, Queen Sirikit National Convention Center, Bangkok, Thailand. Contact: Suzi Fraser Dominy, Tel: +1.808.732.7499, conferences@aquafeed.com, www.aquafeed.info.

► **Victam Asia**, Queen Sirikit National Convention Center, Bangkok, Thailand. Contact: Henk van de Bunt, Victam International, Tel: +31.33.246.4404, Fax: +31.33.246.4706, expo@victam.com, www.victam.com.

► **Petfood Forum**, April 14-16, 2008, Hyatt Regency O'Hare Hotel, Chicago, Illinois, USA. Contact: Debbie Phillips-Donaldson, Watt Publishing Co., Fax: +1.847.390.7100, dphillips@wattnet.net, www.petfoodindustry.com.

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Subscription print edition prices: USA \$84.00/yr, Canada
\$102.00/yr, Outside USA & Canada via Airmail \$144.00/yr;
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Petfood catching up to human food?

“Trends in the pet-food market don’t just follow human food trends, they often do so at accelerated rates,” says David Lummis, senior pet market analyst for Packaged Facts, in his article “Selling safety” (p. 24). As consumers increasingly humanize their pets, they’re looking for products to help them feed their furry charges similarly to how they feed themselves.

At the end of July I attended FoodSmarts, the 2007 annual meeting of the Institute of Food Technologists (www.ift.org). This is one of the key events in the US for the human food industry; this year’s edition attracted more than 23,000 attendees and exhibits from more than 1,000 companies.

Many of those companies have divisions operating in the petfood industry, and those that don’t easily could, because their products and services could readily be adapted to petfood. Think functional ingredients, nutraceuticals, innovative packaging and testing solutions, to name a few.

Eerie similarities

In the same vein, the FoodSmarts conference followed right along the story lines coming out of our industry:

- ▶ David Acheson, assistant commissioner for food protection at the US Food and Drug Administration, talking about food safety;
- ▶ A panel of experts discussing ingredient safety in a global market;
- ▶ Recalls giving a boost to organic foods;
- ▶ The growing role of sustainability in manufacturing and business.

With the global ingredient safety

The two markets share a common cause forged by contamination crises and negative PR.

— Debbie Phillips-Donaldson



discussion in particular, “petfood” could have easily been substituted whenever the word “food” was used, and it would have sounded eerily similar to the panel discussion on traceability during Petfood Forum 2007 in April or our July webinar on petfood safety. (Visit www.petfoodindustry.com/viewwebinar.aspx?id=13598 to access the free webinar archive.)

Take these excerpts from the FoodSmarts discussion on the IFT website:

- ▶ “Though driven by recent problems with Chinese ingredients, this is not a problem with China alone but stems from working in an increasingly complex global environment.”
- ▶ “Global sourcing is a must ... consumers know no seasonality, making sourcing ingredients from all over the world a necessity.”
- ▶ “With the opportunity of great growth in certain markets comes great risk, and the challenge is managing that risk. More attention should be paid to the supplier relationship, including the technical, cultural and language aspects.”
- ▶ “Many consumers wonder why more inspections won’t simply solve the problem. But, you can’t inspect everything; limited resources mitigate against this. If

everything goes to a lab, nothing ends up on a plate.”

- ▶ “What has been learned from the outbreaks? To dig deeper into the supply chain. It is no longer enough for companies to go back to just one source, they may need to go back to the source’s source. Industry cannot be complacent and simply trust their suppliers to do the necessary quality assurance. Companies are ultimately responsible for the safety of their products.”
- ▶ There’s an “opportunity for trade association and select supplier programs to enhance supplier credibility and ... education.”

Common cause

It seems our industry may be catching up to and converging with the human food industry faster than anyone has expected. After all, the two markets share a common cause forged by contamination crises and negative PR: There’s a prevailing desire among professionals in both industries to make safe, healthy products. Perhaps, working together, we can achieve that goal.

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

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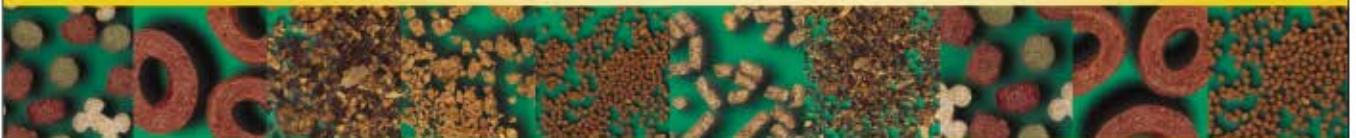
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