

November 2007

Petfood WATT⁹⁰ **Industry**

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Bringing home success

Leigh Kirtley of OmniPro, p. 18

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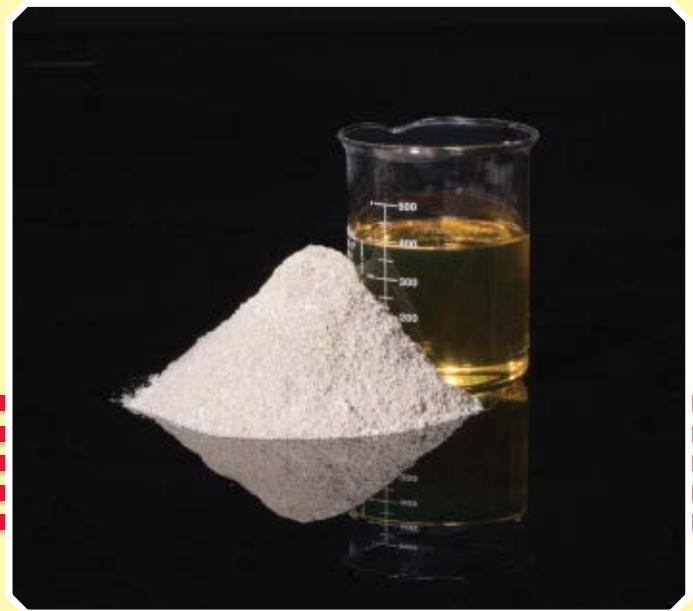
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Photo by Harold Head Photography (www.haroldhead.com)

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Feeding based on breed-specific problems

There is no such thing as no risk for living creatures. Life is risk. But reducing risk, that's another story, and it's the story of Royal Canin's mission. In my opinion, it should also be the mission of all dog and cat breeders.

Royal Canin has formulated a special food for Golden Retrievers by considering the breed's health risks and metabolic particularities. That's what I heard about at Royal Canin's Canine International Symposium focused on the Golden Retriever. The event, held in Chicago, October 10-12, was invigorating and time well spent gathering petfood related information. Here are highlights and comments from some of the presentations I attended.

Hip dysplasia and cancer

Dr. Gail Smith, professor of orthopedic surgery at the University of Pennsylvania's School of Veterinary Medicine, gave a fascinating talk on the genetics of canine hip dysplasia (CHD) and osteoarthritis. He believes the Distraction Index, used in the PennHip

program, is presently the best way to screen for CHD. But, he notes that breeding CHD out of some breeds is an incred-

Cancer risk and prevention can be profoundly affected by nutrition.

— Tim Phillips



ibly difficult task. On the bright side, he had data showing restricted feeding can work remarkably well in postponing or eliminating the pain often associated with CHD.

Dr. Michael Lucroy, associate professor in oncology at Purdue University, emphasized that cancer risk and prevention can be profoundly affected by nutrition. He also discussed what might be the next big thing: epigenetics, the study of heritable changes in gene function that occur without a change in the DNA sequence. We now know that epigenetic mechanisms play a vital role in gene activation and inactivation.

Supporting a lustrous coat

Dr. Denise Elliot, director of scientific communications for Royal Canin USA, talked about the nutrients that can promote healthy skin and a beautiful coat. She asserts that:

- The luster of the coat is related to the presence of sebum, which helps prevent tangling. Sebum quantity and quality are improved with a balance of animal fat, fish oils and vegetable oils (borage and soy).

Online extra!

See a scene from the Royal Canin conference at www.petfoodindustry.com

- Antioxidants, especially working in synergy, reduce oxidative stress. Various antioxidants include vitamin E, vitamin A, taurine, carotenoids and flavonoids.
- The long-chain omega-3 fatty acids EPA and DHA inhibit the synthesis of arachidonic acid, which causes inflammatory reactions.
- Biotin, niacin, panthothenic acid, choline, inositol and histidine work to improve the protective skin barrier. Vitamin A, working in synergy with zinc and sulfur containing amino acids, helps combat seborrhea and dandruff.

Not a gimmick

I confess I used to consider breed-specific nutrition as mostly a gimmick. But over the past few years my opinion has changed. Breed-specific feeding makes a lot more sense to me now. ●

Royal Canin has formulated a special food for Golden Retrievers by considering the breed's health risks and metabolic particularities.



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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Industry News

Register online for Petfood Forum events

Registration for Petfood Forum Asia, Petfood Forum 2008 and Petfood Focus on Safety is now available via a new online system, accessible at www.petfoodindustry.com/petfoodforum.aspx.

Petfood Forum Asia will take place March 5, 2008, in Bangkok, Thailand, in conjunction with Victam Asia 2008 (www.victam.com). Topics for Petfood Forum Asia include global and Asian petfood sales trends, petfood safety and traceability, and new and functional ingredients.

The US events at the Hyatt Regency O'Hare Hotel, Chicago, Illinois, USA, are both scheduled for April. Petfood Forum 2008, April 14-16, features networking opportunities and exciting, informative sessions such as:

- ▶ Ingredient popularity and trends.

- ▶ Preventing brand theft.
- ▶ Packaging case study.
- ▶ The natural and organic markets.
- ▶ Sustainability and carbon footprints.
- ▶ Petfood safety management systems.
- ▶ Weight loss through prebiotics.
- ▶ Alternative petfoods and the melamine fall-out.
- ▶ Ranking the importance of private label worldwide.
- ▶ Managing palatability for treats.
- ▶ Global trade issues.

The Petfood Focus on Safety symposium, April 16-17, gives you an in-depth look at:

- ▶ Crisis contingency planning.
- ▶ Good purchasing practices.
- ▶ Adverse event reporting and preferred vendors.
- ▶ Finding the right insurance.
- ▶ Case studies on quality/safety



programs at a petfood supplier and a manufacturer.

- ▶ ISO 22000—the world's most advanced food safety management system.

Plus, for the first time, the Focus symposium will include a panel discussion on the consumer connection: how best to communicate with consumers, especially during a safety crisis.

Grand jury focuses on petfood plant

In Muskogee, Oklahoma, USA, in September, a federal grand jury investigating political corruption heard testimony from former state Rep. Joe Hutchison and former state Sen. Gene Stipe's estranged business partner, Steve Phipps. While grand jury proceedings are secret, the lineup of witnesses indicates the testimony may have centered on financial transactions involving a McAlester dog food plant built largely with state and city taxpayer money.

Phipps is co-owner of National Pet Products, which incorporated in June 2002. Four months later, the company received US\$419,000 in state money earmarked by then-state Rep. Mike Mass, US\$250,000 from the city of McAlester and US\$100,000 from the McAlester Foundation, a quasi-private

entity. An FBI affidavit alleges Stipe arranged for the state funding and picked the plant's location—a piece of property he owned. Records show Stipe received US\$190,000 for the property, which he had bought five years earlier for about US\$75,000.

Phipps has agreed to cooperate with the ongoing investigation as part of his guilty plea to a conspiracy charge. Phipps admitted paying kickbacks to three legislators who secured state money for his businesses.

Industry heal thyself

Food industries and federal regulators are, according to the *Wall Street Journal*, increasingly advocating "pre-

ventive controls" following a rash of food-borne illnesses: Have companies police themselves and take action to prevent outbreaks. But this system of preventive controls has worked in the past only with adequate regulatory enforcement and industry support—neither of which is guaranteed.

Mike Taylor, a food-safety expert who worked in the administrations of George H.W. Bush and Bill Clinton, was quoted as saying, "The reason you have regulation is some companies don't have the market incentive to meet high food-quality standards. The public doesn't trust a system that leaves it entirely to the industry."

A White House cabinet-level group set up to address import safety problems has recently touted preventive controls as a solution. The FDA is likely to advocate the same in a new food-safety plan to be released soon.

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AFIA to discuss import ingredient safety

AFIA will be hosting a national dialogue on Import Ingredient Safety on November 28-29 in Chicago, Illinois, USA. Information on the registration for the meeting is available at www.afia.org. The topic of discussion will

be AFIA's draft *Guidance for Industry* created for the US Food and Drug Administration (FDA) to issue as safety guidelines for purchasing ingredients.

The national dialogue will be two half-day meetings and begin with a presentation of FDA's perspective on the import safety issue of melamine. It



will be followed by a panel of importers detailing their procedures to ensure safe imports. Then two groups will be formed to discuss two parts of the AFIA draft *Guidance for Industry* and will conclude the first day.

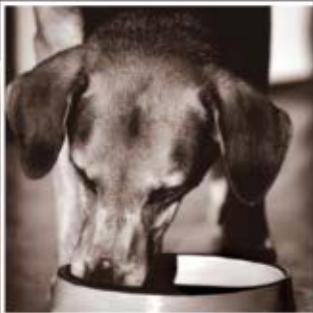
The second day will begin with the two groups concluding their discussions and preparing recommendations on the draft, which will be considered by all attendees. When completed, the draft will be presented to the AFIA Executive Committee for action before the end of this year.

Natural petfood the future of the industry?

Natural, Organic and Eco-Friendly Pet Products in the US (2), the latest report from Packaged Facts, says that the 2007 recalls of petfood has contributed to a huge shot in the arm for the natural pet products market.

According to Packaged Facts, until the early 2000s natural pet products

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PetSmart cuts profit forecast

Continuing to recover from the petfood recalls, PetSmart Inc. cut its third quarter and 2007 profit forecasts last week, citing weak consumer spending, sending its shares down by 5%. CEO Philip Francis said weak consumer spending, along with unusually warm weather that hurt sales in key cold weather categories, will cut into business. For the current quarter, PetSmart expects earnings of US17 cents to US20 cents a share. Previously, the

fell mainly in the scope of smaller marketers, few of which had annual sales of more than a few million dollars. Since then, top petfood players like Nestlé Purina, Mars, Del Monte, Hill's and Iams have been steadily increasing their presence in the natural segment. Packaged Facts suggests the natural pet products market will grow from US\$1.3 billion in 2007 to US\$2.5 billion by 2012.

Coupled with the recalls, Packaged Facts points to "...the growing clout of premium pet demographics, the trends toward pet humanization and 'functional pampering' and the aging pet population..." as causes of a 500% rise in sales of petfood in the segment during the 52 weeks ending July 15, 2007.

Packaged Facts charts further movement beyond organic to "human-grade" and locally grown and sourced ingredients.

Fresh petfood big trend at expo

The major food trend at this year's Natural Products Expo East show in Baltimore, Maryland, USA, was fresh petfood. The cooked, sliceable food

company forecast US21 cents to US23 cents.

Francis said the recalls would cut PetSmart sales by "some tens of millions of dollars" by the end of the year. He expects to have all brands back on shelves by the second quarter of next year. PetSmart, which already cut third quarter same-store sales outlook in August citing the recalls, said sales would come in below its original forecast of a rise in the low- to mid-single digits.

For the full year, the company forecast earnings of US\$2.02 to US\$2.07 a share, including a gain from the sale of shares of MMI Holdings Inc. which operates PetSmart's in-store veterinary hospitals. It previously forecast US\$2.08 to US\$2.10 a share.

showcased was packaged either like rolls of sausage or in resealable plastic containers. Companies like Deli Fresh and Freshpet are confident they are on the verge of huge sales, due in no small part to this year's recalls. Earlier this month, Deli Fresh puppy and adult dog food became available through Ama-

zon.com.

"It may take some retraining on the part of the grocers to find a place for fresh petfood on the refrigerated aisle," said Cathal Walsh, COO of Freshpet. "But other countries are well on their way. Fresh petfood accounts for 20% of the Australian market."

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Feedback

Will Menu Foods survive?

Following are responses to an online survey of *Petfood Industry* readers in September 2007. Of 52 respondents, 26

replied to this question: **Do you believe Menu Foods will be able to recover fully from the recalls earlier this year? Why or why not?**

Thirteen respondents said no, 11 said yes and two said

maybe. Here are some of the comments:

- ▶ Maybe. This will be a big blow to them and it really depends on how deep their pockets are. I think

some customers are still avoiding foods produced at Menu. We need a wet petfood plant in Canada, so if Menu becomes insolvent, I'm sure they would be purchased by some other consortium.

- ▶ No. I don't think Menu Foods will recover. Pet owners treat their pets like they are human and don't want to take any chances when choosing their food. There are hundreds of companies out there that were not affected by the recall.
- ▶ Yes. Even though they lost a lot a business and had to sell their North Dakota, USA, plant to Mars, Menu Foods is a solid company and will get by this recent adversity.

- ▶ No, because their reputation will be difficult to repair.
- ▶ Yes. Their manufacturing is vital to the industry.
- ▶ No. Their business is primarily private label or co-packing for other brands. Some of their biggest accounts are moving to other co-manufacturers or building their own plants.
- ▶ Yes. They will improve quality control of incoming ingredients. Also, the industry needs Menu's capacity.

Please post your comments on the Discussion Board at www.petfoodindustry.com/discussions.aspx.



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- Ingredient popularity and trends.
- Preventing brand theft.
- Packaging case study.
- The natural and organic markets.
- Sustainability and carbon footprints.
- Petfood safety management systems.
- Weight loss through prebiotics.
- Alternative petfoods and the melamine fall-out.
- Ranking the importance of private label worldwide.
- Managing palatability for treats.
- Global trade issues.

Plus! These insightful roundtables:

- Top petfood company CEOs discuss the state of the industry.
- Leading pet retailing executives highlight consumer trends.
- Experts on new product development debate the push and pull between science and marketing, R&D and production.



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New this year!

A panel discussion on the consumer connection: how best to communicate with consumers, especially during a safety crisis.



For more information or to register for either event, turn the page or visit www.petfoodindustry.com/petfoodforum.aspx.

Or contact Nancy Grossnickle at ngrossnickle@wattnet.net or Tel: +1.815.734.5674.

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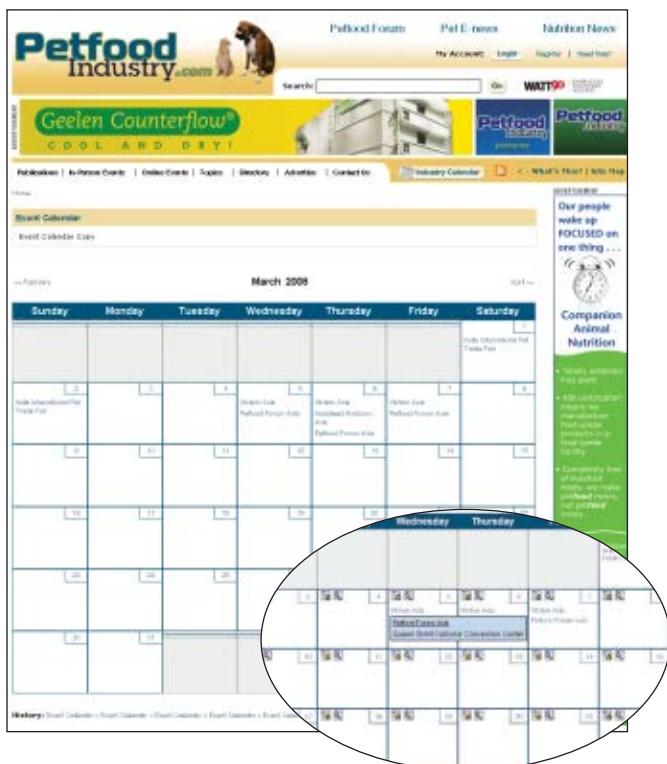
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Save the date and plan ahead

PetfoodIndustry.com makes it easy to keep track of upcoming petfood industry events with the Industry Calendar function. Simply click on the Industry Calendar icon on the upper right of the homepage to find a plethora of trade shows, symposiums, short courses and other dynamic events, all at your fingertips.

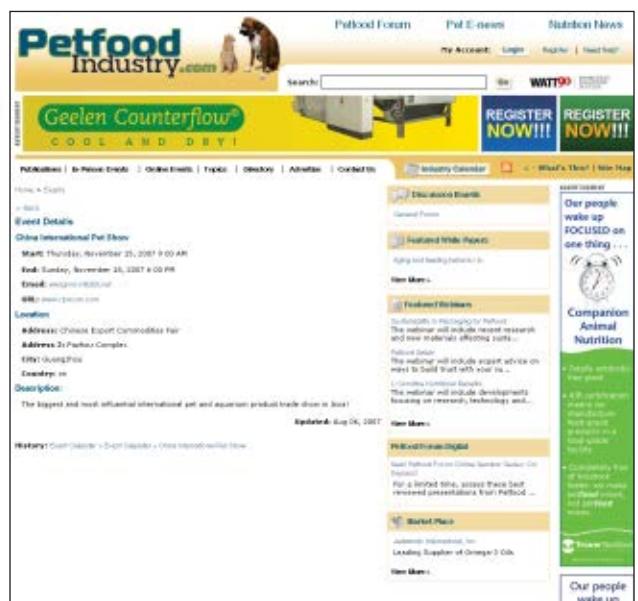


After clicking on the Industry Calendar tab, this month's calendar will appear on your screen, with upcoming events viewable by date. Use the left and right arrows at the top of the calendar to view other months, listing past and future events. Scroll over an event you're interested in for a brief



description or click on a particular event to view more specific details.

Once you have chosen a particular event to view, you will be taken to the Event Details page. Here you will find the starting and ending times, the location, contact information for registration and a brief description of the event.



The Industry Calendar is not only a great tool for planning your schedule around industry events, but also an easy way to keep an eye on what's going on in the industry around the world. The Industry Calendar is also a supplement to the Meeting Planner section of this magazine – if you need further information on an event you see listed in print, simply log on to PetfoodIndustry.com and check the Calendar for more details.

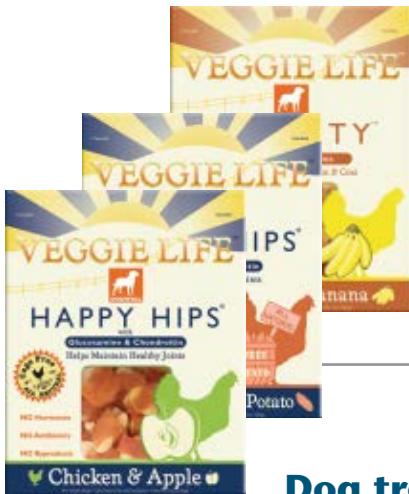
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« Food line for small breed dogs

Royal Canin has introduced MINI Miniature Schnauzer 25, MINI Toy Indoor Adult 25 and MINI Indoor Puppy 27 to their MINI dog food line, intended for dogs weighing less than 20 pounds at adulthood. MINI Miniature Schnauzer has a lower fat content to help decrease the risk of cholesterol deposits, a common occurrence in the breed. MINI Toy Indoor Adult is meant for dogs reaching only 6 pounds at adulthood, and according to the company, can help minimize the effects of exposure to viral or environmental contaminants. MINI Indoor Puppy is designed to support nutrition and curb obesity starting at a very young age in the less active indoor dog. www.royalcanin.us

» Omega Sauce for cats and dogs «

NuHemp Omega Sauce, which is designed for both cats and dogs, features hemp oil, a source of omega 3, 6 & 9 essential fatty acids, according to Kix Nutrition. The line of supplements includes flavors such as Roasted Chicken, Sizzling Bacon, Luscious Liver and Peanut Butter Smoothie. The holistic Omega Sauce "Plus" is for dogs and cats with joint, hip or digestive problems and has MSM, glucosamine and FOS. www.nuhemp.com



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Bringing home success

After prospering overseas, a woman-owned business brings innovation to the US

BY DEBBIE PHILLIPS-DONALDSON

OmniPro is unique in being owned and managed by a woman—a rarity in the male-dominated petfood industry.

Leigh Kirtley is a “machine,” according to her banker. In the past year, she has launched 10 new petfood products, established her OmniPro superpremium petfood line in 21 countries outside of North America and set in motion an ambitious US launch to start in early 2008. Until recently she has done all this on her own in the male-dominated pet industry from an office in tiny Madison, Mississippi, USA.

“It’s a lot to manage,” she says. “When my banker said I was a machine, I replied, ‘I have to be!’”

But her management achievements this year have included finding key support people and partners and developing a plan for what she insists will be controlled growth. “Companies can grow themselves out of business,” she says, “so we are targeting a 50% growth rate because we feel this is the most we can manage.”

Through the back door

Kirtley started OmniPro in 2004 to complement her export business, K & K Pet Products Export Inc., which she opened in 2000. After successfully exporting products from Chomp Inc. (treats), Nutri-Vet Nutraceuticals LLC and Feline Fresh (cat litter) to 51 countries, she decided she needed petfood to round out the line. To better control the product line in what she saw as an ever-changing regulatory environment, she

launched her own petfood company.

“For now we are a boutique operation in a highly competitive niche market, one of the main reasons we decided, from a marketing standpoint, to come in through the ‘back door,’” Kirtley says. “We established dominance in the less competitive overseas market first to achieve a stable base of repeat customers. We simply found a need in the global market and filled it. And, I had established contacts through trade shows and referrals in the industry.”

Kirtley’s college degree is in international trade, and she had worked as a

Business basics

Headquarters: Madison, Mississippi, USA

Officers: Leigh Kirtley, president; Bill Porter, CFO; Sheri New, customer service

Brands: OmniPro Superpremium dry foods, OmniPro Holistic canned foods

Facilities: All production done by contract manufacturers

Distribution: Available in 21 countries in Asia, the Middle East and Europe. Will be available at major US pet retailers starting in the first quarter of 2008

Employees: 6

Website: www.omnipropet.net

trade specialist for the state of Mississippi, helping companies import and export. When she decided to leave that job and start her own business, she chose the pet industry because of its high volume, which she had noticed while doing research for other companies. "It was a numbers game," she says.

Unique ingredients

OmniPro began with a line of superpremium dry foods that has grown to 23 SKUs for all lifestages. The formulations were developed using chicken and rice or lamb and rice as the base, plus other ingredients designed for export to the European Union and other countries with strict regulatory environments for imports, according to Kirtley.

She explains that she worked with experts at her contract manufacturers to develop the formulations. "I tried to keep them clean so they would clear customs in all the countries," she says, referring to the dry food formulations.

When it came time to develop a wet food line, Kirtley had three goals:

1. Innovation;
2. Humanization;
3. Health.

The result was OmniPro Holistic canned foods with unique ingredients such as caviar, sweet potatoes and pheasant. The base protein for most of the wet products is salmon because, Kirtley believes, "You don't have to explain the health benefits of salmon. It's delicious with exceptional nutritional value (omega 3 essential fatty acids) found in few other foods.

"For the carbohydrate, I didn't want rice or potato because everyone has it, and it's bland. I wanted something different," she adds. "The caviar was a natural for me because I go to the sushi bar, and I get that all the time."

To Kirtley, adding caviar was also a way to humanize the product—and it worked. Sales doubled, she reports, af-

A MAP for exporting US petfoods

To market OmniPro and other pet products outside the US, Leigh Kirtley arranges an exclusive distributorship in each of the countries to which she exports. "We use the Market Access Program, or MAP, which is part of the Foreign Agriculture Service (FAS) within the US Department of Agriculture (USDA)," Kirtley explains. MAP includes a matching marketing funds program, which allows her distributors to receive 50% back on their marketing plans for the products they sell for her companies.

According to the FAS website (www.fas.usda.gov), MAP uses funds from the USDA's Commodity Credit Corp. to "help US producers, exporters, private companies and other trade organizations finance promotional activities for US agricultural products. MAP encourages the development, maintenance and expansion of commercial export markets for agricultural commodities." The program provides funding for consumer promotions, market research, technical assistance and trade servicing.



Working with an exclusive distributor in each of 21 countries outside the US, OmniPro uses a USDA program that gives the distributors matching marketing funds. This delivery van belongs to the distributor in Finland.

ter the first four flavors hit the market in September 2006.

Kirtley built on the initial success by adding lifestages to the wet foods line. These include puppy and kitten formulas with a double protein source (chicken added to the salmon), plus lite products with a second main ingredient (besides the salmon) of sweet potato.

Kirtley is positively bullish on the latter ingredient. "The sweet potato not only adds an all-natural flavor to the product but also delivers health benefits without the extra calories," she says. Plus, her home state of Mississippi is a major producer of this crop,

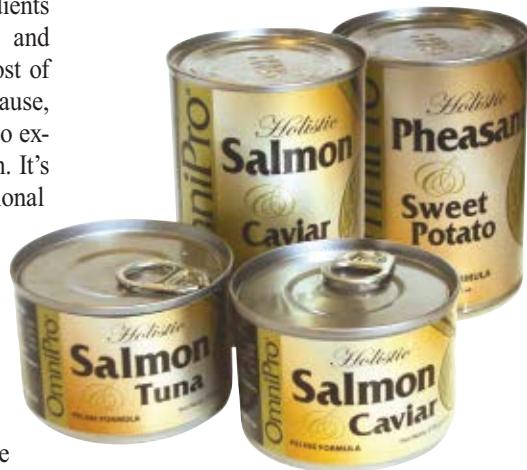
and it's a staple in many cultures around the world where OmniPro products are sold.

Building a team

With the global success of OmniPro, Kirtley believes other elements are aligning to launch it in the US, which she's planning for the first quarter of 2008. But rather than continuing to go it alone, now she's reaching out to a team of experts to help, including a transportation manager and CPA, both part-time and off-site.

Kirtley also relies on customer service representative Sheri New and a national sales firm that is working to get the products into major US pet and natural food retailers. Also joining the team is Bill Porter, a local businessman with a wealth of experience working with small, minority-owned companies and now serving as OmniPro's part-time CFO.

Porter sees more success and profit ahead for the company because of Kirtley's passion to create unique



The OmniPro Holistic canned line features unique ingredients like caviar, pheasant and sweet potato, with salmon as the base.

products that the market wants. “Those are usually the best sellers, especially in a small company,” he says. “You live it, go to sleep with it, wake up the next morning and it’s still yours. And you’re just so committed, and I’ve always felt that’s the best.”

For the US launch Kirtley is also

relying on her existing partners at her contract manufacturers to deliver the volumes needed for the US market. Both the dry and canned food manufacturers have doubled capacity this year, with the final phase of expansion for the canned manufacturer due in the first quarter of 2008.

“You live it, go to sleep with it, wake up the next morning and it’s still yours.”

Made in the USA

Kirtley sees her relationships with these vendors as key to OmniPro’s success. “None of the plants I work with were involved in this year’s recalls because none of them import ingredients,” she says. (The lone exception is the lamb used in some OmniPro dry foods, which comes from New Zealand. According to Kirtley, because the US has had cases of BSE, other countries require lamb used as an ingredient to be from New Zealand or Australia.)

Kirtley says the fact that all other OmniPro ingredients are US grown or produced has been a major selling point. “Our whole concept is ‘Made in the USA.’ We have the American flag on everything,” she explains. “In overseas markets, ‘Made in the USA’ carries a lot of weight, because it’s perceived that we can make a higher quality food than can be made in other countries.”

Kirtley believes that perception means the industry will continue to prosper, despite the US recalls. “I still think the US makes the best petfood on the planet, and everybody knows that,” she says. “Our plants are booming.”

Her long-term goal is to come out with a dry petfood line to match the holistic canned line. “That will be the only dry food on the market with caviar in it,” she says. “Conventional wisdom says that a healthy diet is one low in fat and—invariably—short on flavor. I beg to differ.” ●

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US petfood sales go boom

Up 34% with more spending on products that are less utilitarian and more fun

BY TIM PHILLIPS, DVM

The total US market for petfood and supplies, adjusted for inflation, grew more than 34% from 2002-07, according to IRI Infoscan data in an August 2007 report from Mintel (www.mintel.com). The study attributes some of that growth to pet owners spending more on products for their pets that are less utilitarian and more fun. Consumers are also becoming more discerning about the quality and makeup of products they feed their pets in light of the wide-scale petfood recalls that began in March 2007. Mintel expects the market to continue dynamic growth through 2012 as consumers continue to treat their pets as well as, or better than, they treat themselves.

For its report, Mintel commissioned exclusive consumer research through Greenfield Online to explore pet ownership and care. Fieldwork was conducted in May 2007 among a nationally representative sample (weighted against the total population for estimation) of 2,000 adults aged 18+. The report also includes data from Simmons Research, using the National Consumer Survey (NCS) and IRI's Infoscan data. Wal-Mart sales are not included in the IRI data, but Mintel estimates US sales of petfood and supplies through Wal-Mart will be US\$3.7 billion in 2007, accounting for 15% of sales. Value figures are at retail selling prices (rsp) excluding sales tax.

Key findings

Hispanic outreach. Hispanics, a quickly growing part of the US market, are more likely than non-Hispanics to own a dog. Marketers should consider more outreach through channels that Hispanics are apt to use.

Changing channels. Mass merchandisers command 34.5% of the total market for petfood and supplies, compared to 22% for supermarkets and 19% for pet specialty stores. Mass merchandiser prices are 13-18% lower than the prices in traditional supermarkets, according to *Progressive Grocer*. On the other hand, pet specialty stores offer a "warm and fuzzy" shopping experience and frequent shopper programs.

Pets as reflection of self. The shifting perception of the family pet, from companion to reflection of oneself, continues unabated. Pet owners are increasingly interested in products and services on the higher end of the pet care spectrum.

The recall effect

A May 2007 Greenfield Online survey found that 93% of pet owners were aware of the petfood recalls. Asked if the petfood recalls changed their petfood purchases, 30% said yes and specified as follows:

- I changed the brand of petfood I buy62%.
- I made homemade petfood for my pet 28%.
- I switched to organic petfood..... 16%.
- I changed the retailer from which I buy petfood.....15%.
- Other reasons..... 18%.

This shows that some pet owners will go to great lengths

to care for their pets and keep them safe. Manufacturers have their work cut out for them in rebuilding trust with these consumers. However, Mintel believes that most of the organic/all-natural converts who switched due to the recall will not stay with these versions into 2008. Food safety scares often change consumers' behavior just temporarily.

Market drivers

Pet populations. According to the American Pet Products Manufacturers Association, there are approximately 88 million pet cats in the US today. Cats outnumber dogs by 14 million; however, the number of dogs increased 1.2% between 2005 and 2007, and the number of cats declined by 2.4% during that period.

Green products. Pro-environmental products and services for pets seem to have an especially bright future. Expect aglines like "Love your pet; love your Earth."

Obesity solutions. Pet owners are addressing pet obesity much as they would for themselves, creating opportunities for both traditional weight loss solutions and weight loss "shortcuts" for pets. Mimicking some human weight loss solutions, such as Jenny Craig for dogs, could be beneficial.

Aging pets. A significant percentage of U.S. pets have reached the mature lifestage—15% of dogs and 17% of cats are over the age of 11. More pet owners will be purchasing more expensive lifestage- and condition-specific foods, sup-

plements and treats, like those that address joint and digestive health, as well as those that maintain vision.

Dog food sales

Among US dog owners, dry food is the preferred type. The most cost-effective of the three types, dry dog food is available in larger sizes than wet and semi-moist varieties are. However, dry food does not have the same image of freshness that some wet foods have. Manufacturers like Pedigree have attempted to change this perception by introducing its products in resealable zipper bags.

Because the recent recalls primarily affected wet pet foods, Mintel expects to see a notable shift in 2007, with wet food buyers shifting to dry foods. More than three in four dog owners say they buy biscuits or treats. Like dry dog food, biscuits and treats were largely unscathed by the recalls; however, major manufacturer Del Monte did announce the recall of a number of its treat products on suspicion of contamination.

While use of dry dog food was scattered across a number of brands, wet dog food buyers appear to have a clear preference for the Pedigree and Alpo brands.

The Pedigree brand was not a part of the recall, which means that household penetration should remain steady or increase in 2007. An increase is likely as wet products from Alpo, Iams and Eukanuba were all voluntarily recalled,

Popularity contest



Simmons NCS data indicate that in US households, between January and October 2006, the most popular brands for these petfood segments were as follows.

Dry dog foods

Pedigree (Mars).....	16%
Iams (P&G).....	12%
Ol' Roy (Wal-Mart).....	12%
Kibbles n Bits (Del Monte).....	11%
Purina Dog Chow (Nestlé Purina)....	9%

Wet dog foods

Pedigree (Mars).....	37%
Alpo (Nestlé Purina).....	28%
Mighty Dog (Nestlé Purina).....	11%
Cesar (Mars).....	7%
Iams (P&G).....	6%

Dry cat foods

Friskies (Nestlé Purina).....	17%
Meow Mix (Del Monte).....	15%
Purina Cat Chow (Nestlé Purina)....	15%
Iams (P&G).....	11%
9Lives (Del Monte).....	8%

Wet cat foods

Friskies (Nestlé Purina).....	38%
9Lives (Del Monte).....	31%
Fancy Feast (Nestlé Purina).....	30%
Whiskas (Mars).....	18%
Hill's Science Diet (Colgate).....	4%

Post-recall messages

The role of marketing communication has been heightened in the petfood market in the aftermath of the petfood recalls of early 2007, says Mintel. With products from more than 100 brands recalled, many consumers were and are unclear as to which brands and products are safe. Companies that had no contaminated products are distancing themselves from those that did, proclaiming that their brands were not affected and providing information as to the sourcing of their ingredients.

Some brands, such as Purina Cat Chow, have taken a "less is more" approach, simply stating that their products have not been recalled and leaving it at that. The Pedigree brand goes

further. This brand also has a statement in small print at the top of its homepage asserting that the brand is "safe and not part of the recent nationwide petfood recall." However, site visitors requiring more information are then directed to a longer, more specific statement, disavowing any relationship with Menu Foods, the manufacturer cited as the source of many of the contaminated products.

For companies that were directly impacted by the recalls, recovery efforts have been more extensive and more costly. In April 2007, Procter & Gamble, parent company of the Iams and Eukanuba brands, took out full-page ads in 59 US newspapers. The company assured consumers that, even though a small number of its wet petfoods under the Iams and Eukanuba labels were impacted by the recalls, products remaining on shelves were safe, a claim supported by an independent task force of veterinarians.

Food safety scares often change consumers' behavior just temporarily.

and some wet food consumers have switched brands as a result.

Cat food sales

Dry cat foods tend to be the staple foods used by US cat owners surveyed, although there appears to be a great degree of overlap in types of products used, with nearly half of cat owners saying they also use wet food. Dry cat food buyers are twice as likely as wet cat food buyers to say they use a light variety, which is not surprising given that wet cat food typically carries an indulgent positioning.

There appears to be a fair amount of overlap in the brands of treats/snacks used by cat owners. With cat owners being more likely to buy treats on impulse (as opposed to the planned purchase of food), it is likely that pet owners buy a regular treat that they know their pet likes and some other brand that looks good to them at the time.

The fact that not even 20% of cat owners use any one particular brand of listed dry cat food brands points to a highly populated dry cat food segment. As companies continue to merge (e.g., Del Monte acquiring Milk-Bone and Meow Mix in 2006), it will become even more important for manufacturers to evaluate product lines to discontinue non-performers and possibly merge brands where products overlap.

Just as was seen with wet dog food, cat owners have clear brand preferences, with the largest percentage reporting that they use Nestlé Purina's Friskies brand. Another 30% say they use the company's Fancy Feast brand.

Sunny forecast

Mintel uses the SPSS time series package to forecast the market to 2012. SPSS correlates historic market size data with key economic and demographic determinants, identifying factors having most influence on the market. Mintel expects US sales of petfood and supplies to rise to US\$35.3 billion by 2012, an increase of 26% (adjusted for inflation). ●

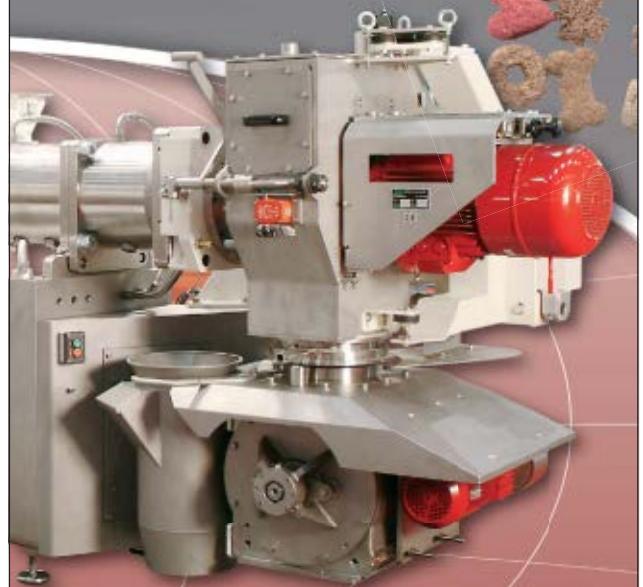
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Save energy

It's time to tackle carbon footprint issues urgently

BY COLIN MAIR

In the petfood industry we use massive amounts of energy. With the combination of ever increasing energy costs and public and legislative pressure to reduce energy use, now is the time to increase efforts to measure and minimize energy costs.

Most major retail chains have made commitments to drastically slash the carbon footprint for their own operations, with a parallel target of adding a carbon label to all of their products. It is in our interest as an industry to tackle these issues urgently.

Following is an overall strategy for measuring direct energy costs. Also presented are ideas for improving extrusion plant performance that can save up to 25% on energy costs (see ideas in the purple backgrounds).

Start at the top

I recommend a unified method for approaching the subject, thus preventing fragmentation of standards and techniques. The first issue with any company is to ensure the project is fully endorsed by all of the key decision makers, starting at the top. One senior

Pre-warm conditioning water

For faster hydration; quicker warm-up in conditioner, effectively increasing size of conditioner; use less steam to warm up water

person is normally designated as energy manager. For smaller companies this can be an existing manager.

Often there is a need to bring in support from outside the company, usually in the form of consultants with the appropriate skills. The company need not rely on any one organization, as there will be a lot of expert help available from existing suppliers.

The major retail chains have made commitments to drastically slash carbon footprints.

Define scope and implement

The next step is to define the overall scope of the project. This may be a simple definition of targets for energy reduction or may be much more complicated, covering corporate ambitions to achieve ISO 14000 environmental quality management accreditation.

As with all projects, poor planning produces pretty poor performance (5 Ps). Initial planning should be thorough. There are plenty of public resources available that can help. Use the Web to check federal, regional and state resources. These will help with advice

Use misting injector to condition steam

For more rapid heating; more homogenous heating; better absorption of steam thus reducing waste

on implementation strategies, financial assistance available and regulatory issues. Also study models of strategies used by companies around the world.

When implementing the plan follow these rules:

- ▶ Plan and re-plan before doing anything.
- ▶ Measure consumption before acting.
- ▶ Make changes to improve performance.
- ▶ Validate the beneficial effects of the changes.

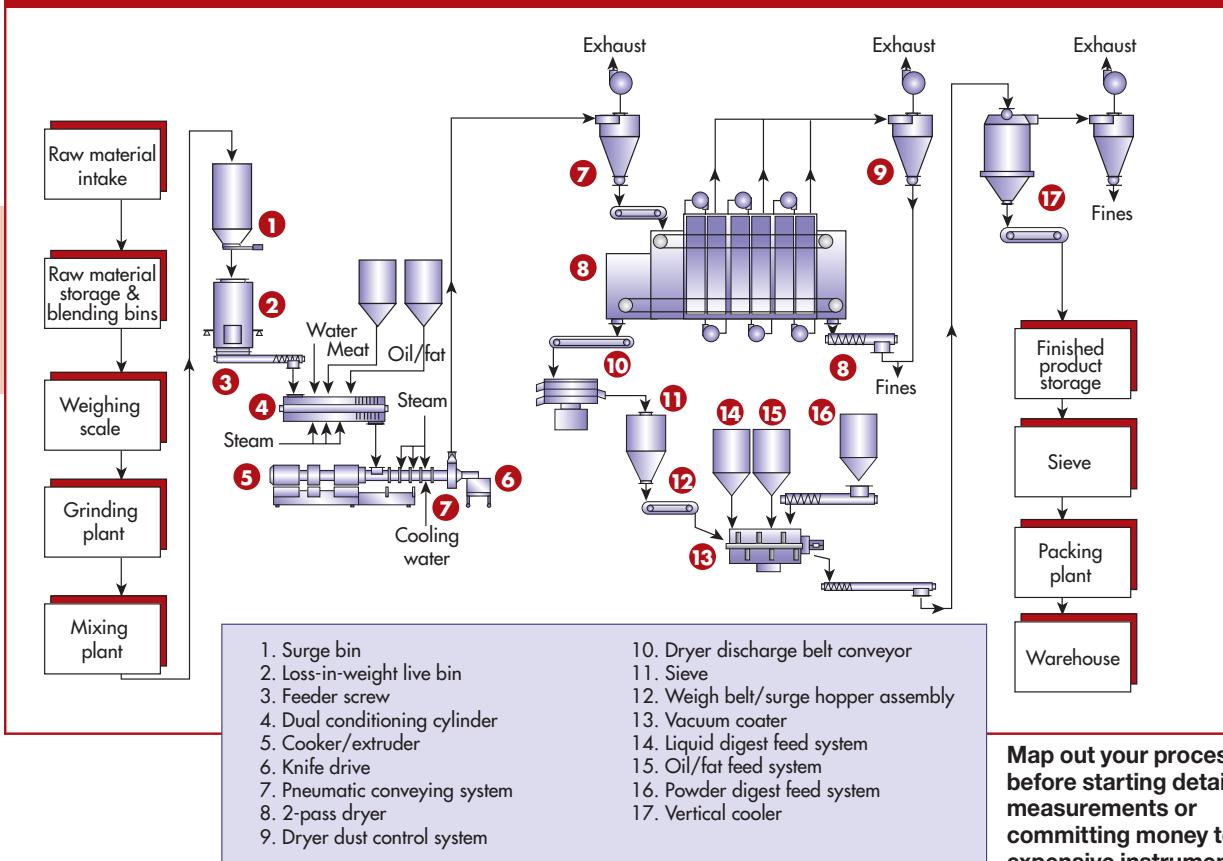
Use pulse jet injection

For better control of injection rates; avoids conditioning steam ratholing, giving better absorption

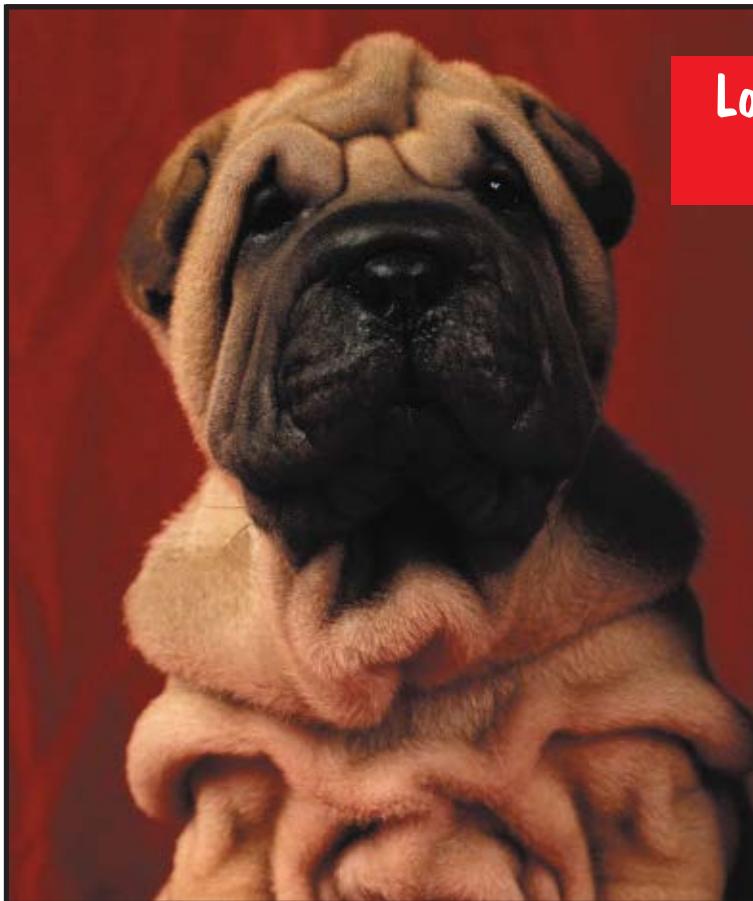
Look at overall consumption

Overall consumption can be reported in several ways, usually cost per unit of product—expressed either as monetary value of product or as weight. Expression as cost per weight of product is more convenient because

Figure 1: Typical process diagram for the production of petfood



Map out your processes before starting detailed measurements or committing money to expensive instrumentation.



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Pre-dampen cereal grains

For removing moisture variations and improving hydration and cook before grinding

historical comparisons can easily be made as the project progresses, especially where external influences produce large changes in product pricing. However, energy costs as a proportion of product value is important, especially when looking at added value products vs. low margin products.

Map before measuring

Map out the process before starting detailed measurements or committing money to expensive instrumentation. This can be in the form of block flow diagrams, plan maps of the facility or a process flow chart of the plant (Figure 1, p. 27).

Pre-dampen mixed powders

For more rapid and homogeneous heating and hydration in conditioner

Use the process map to identify key points for energy measurement. It is a good exercise to measure no-load and full-load power consumption of all electric motors, but at the very least target the large motors with the most potential for savings. Also have product samples tested thoroughly for quality characteristics, as these will be used later for comparison.

It's ideal if the entire plant has all its parameters measured for every product when running under equilibrium conditions, with all the motors also measured when under no-load conditions. This will allow a snapshot view of key performance indicators (KPIs) for each product. The following list indicates some useful baseline KPIs per unit of product, whether this is measured in weight or value.

- Total direct energy costs;
- Extruder specific mechanical energy;
- Extruder total electrical energy;
- Extruder/conditioner specific thermal energy;
- Dryer thermal energy costs per unit of product;

Use water from barrel cooling

For conditioner water or boiler make-up water; avoid capital and energy expense of chillers

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Reducing energy costs is highly complex and should be approached in a highly systematic way—ideally reflecting methodologies and practices recommended by government authorities and the many initiatives introduced by retail chains. There are many competent organizations that can help us audit our energy costs and carbon footprint, but it is in our own industry that we have the skills to address the heart of our processes to minimize these costs. ●

Colin Mair has worked for 30 years in product and process development. He is the founder of Cormal Technology, which develops technology to support thermal processing systems. Contact him at colinmair@btinternet.com or Tel: +44.1526 344495.

Online extra!

For Colin Mair's complete, original article, go to www.petfoodindustry.com/energy.aspx.

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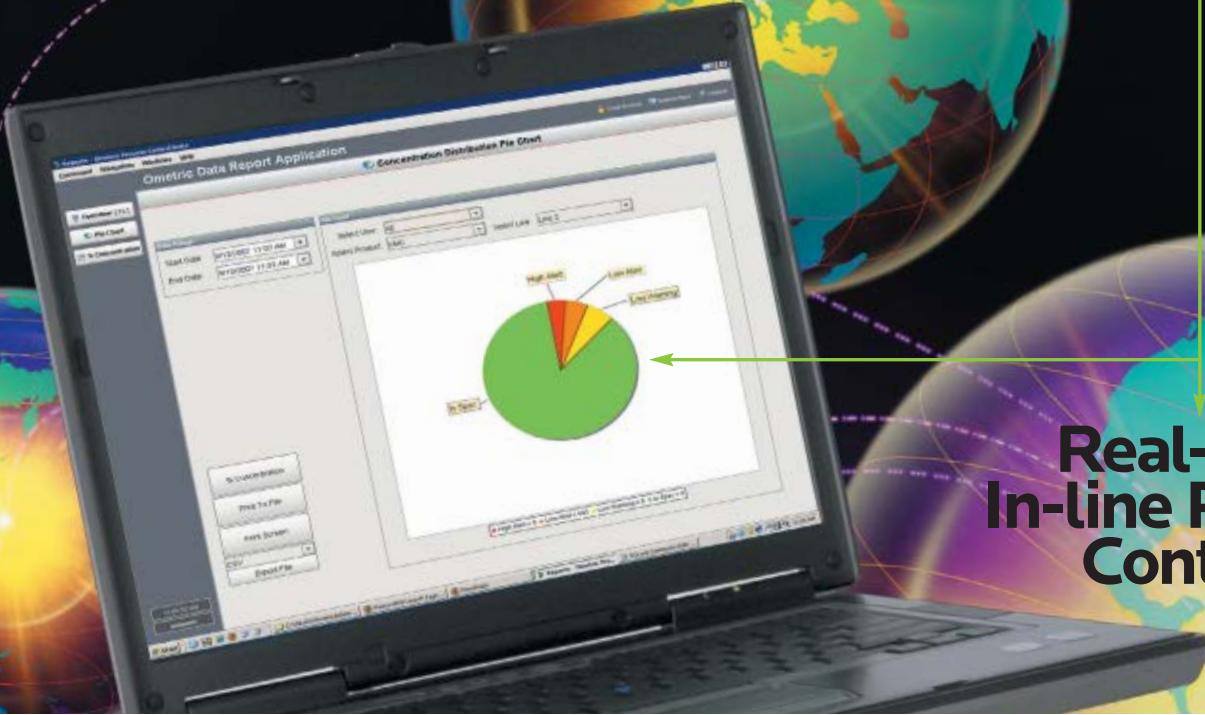
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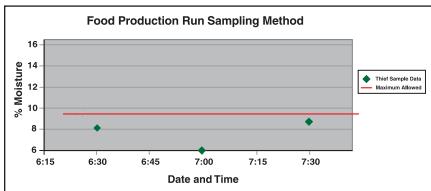


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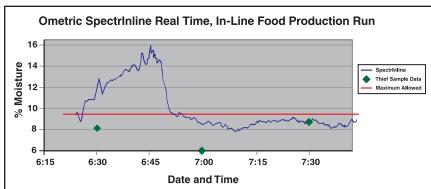


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For a successful
product launch,
all pieces of
the business
need to work
in concert

BY STEVE SIEMBIEDA

Imagine your favorite song, sonata or symphony. Hear the beauty and elegance of all the instruments working in harmony to create a composition that has the ability to evoke emotion or quiet the soul.

Suddenly that same musical piece digresses from the perfect; one or more key instruments are out of tune or missing altogether. Now a completely different sound is heard. For the inexperienced listener, this new piece might not be objectionable. For the experienced, however, it would be unbearable.

Successful product introduction should be more like the full musical experience. All pieces of the business enterprise need to work in concert to successfully launch a new product. The required components of the ensemble include a company's marketing, regulatory, research, operations/production and sales divisions. Each area has unique and specific obligations for the launch and product introduction. Communication between these functional units is the key.

Virtually anyone in an organization can come up with a moneymaking or moneysaving idea.

The functionally connected organization

Virtually anyone in an organization can come up with a moneymaking or moneysaving idea. Employee empowerment is the key. Companies that encourage everyone in the organization to think about new products provide a powerful network of connectivity. From the salesperson in the field to the research scientist on the bench, the functionally connected enterprise with a clearly stated and understood vision and mission and open lines of communication will maximize its capacity to introduce new products and grow its business.

As the advertising and development costs associated with product launches have increased dramatically while product life cycles have shrunk, the rate of success for new products has decreased considerably (Dalens *et al.*, 2002). Little insight has been provided on the role of functional business units and the importance of communication within the product launch process.

The launch process

Figure 1 shows how an idea might proceed from the product launch perspective. Since marketing is ultimately responsible for product launches in most companies, this department plays a central, linchpin role. Marketing acts as the mediator between the functional units. It's tasked with discerning what products the customer wants and communicating that to the organization, along with how to position and sell new

products. Defining product qualities based on customer needs is one of the first steps in the product launch.

The functional units' interactions generally take the following path:

- The research and regulatory departments (square 1) are involved heavily in the initial stages of product launch.
- Next, regulatory and operations (square 2) must provide assistance and guidance in gaining regulatory approval and engineering the production process.
- Finally, operations and sales (square 3) finish the product development process as they manufacture, introduce and sell the product to the customer.

Marketing plays pivotal role

Miscalculations at the marketing stage are likely to doom the product to failure, no matter how well subsequent units execute. The marketing department must determine the ideal market segment in which to sell the product, applying the four P's of marketing: product, place, promotion and price.

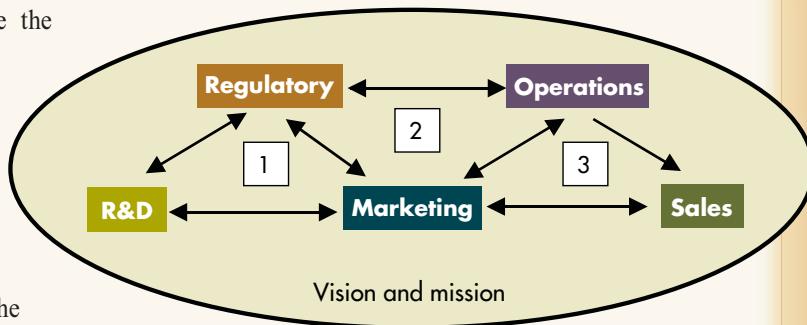
Along with understanding what the market/customer wants, marketing personnel must have a strong technical understanding of the product. They must be aware of physical, chemical, biological or other constraints while establishing the essential characteristics of the new product. Marketing must also sift through and incorporate ideas coming from other functional units, determine potential, formulate a position statement and eventually create a full-blown market plan.

Finally, good marketers must know how to differentiate the product from the competition. The ultimate goal is to make the product number one or two in its product class.

Regulatory requirements

The regulatory department's focus is to work with the appropriate government agencies to obtain certificates of approval/registration for the new product. Often this is the last department to be consulted in the product launch. The experienced company knows, however, that consulting with

Figure 1: Organizational product launch map



In the product launch process, marketing acts as the mediator between the functional units as it discerns what products the customer wants and communicates that to the rest of the organization. The numbered boxes indicate key interactions between units.

regulatory personnel should be the first stop, since fulfilling requirements usually consumes significant time and money.

Managing expectations of senior management is crucial when government approval is required for a new product. Most companies have limited control over the approval process aside from response time to office actions requested by the agency. Providing realistic estimations of the current approval timelines as well as evidence of frequent contact with the agency can address concerns from senior management.

Research and development

Patented, proprietary products that have the potential to achieve number one or two in a given market are critical to maintaining an edge over competitors. The main role of research and development is to discover novel technologies and conduct relevant research to support a product launch.

In a commercial setting, designing experiments that support regulatory and marketing claims is essential to the product launch. Concomitant research to understand how the product works is often necessary and completed simultaneously with the efficacy studies.

Research studies can generally be divided into three areas:

- Basic research;
- Safety research;
- Clinical/efficacy study research.

If one set of experiments can fulfill the requirements of more than one of these research areas, both time and money can be saved.

Manufacturing's focus

The main role of the operation/production department is to build the product to specified parameters (as designed through the launch process) and make a quality product consistently and efficiently. Standard operating procedures, process controls (such as HACCP) and an understanding of good manufacturing procedures are all important. Generally, the operations department is also in charge of inventory control

Virtuoso performance

To successfully launch a new product, various functional units of a company must perform together like a virtuoso musical ensemble. Required "instruments" include:

- Marketing;
- Regulatory;
- Research and development;
- Operations/production;
- Sales.

and production scheduling.

During product launch, changes to the manufacturing process are common; however, defining an established process to make the product within the allotted specifications is the ultimate goal. Early and excessive process optimization, with the otherwise admirable goal of reducing costs and improving final products, can result in costly delays in product launch. To ensure a successful and timely launch, validated quality control assays should be developed prior to final equipment placement and adjustment.

Sales: on the front lines

Members of the sales department are ultimately responsible for selling the new product to the customer base as defined by the marketing department, so a considerable amount of communication between these two departments is a must. During a product launch, a representative from the sales team should be involved in the later stages so he or she can anticipate and express the concerns of future customers. An experienced sales manager will ensure the sales team is on board with the concept and desirable features of the new product.

Outside of early market research focus groups and con-

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Miscalculations at the marketing stage are likely to doom the product to failure.

sumer test panels, the company's sales force is the first to see customer response to a new product at the grass roots level. Enlightened company management will encourage salespeople to report their observations of customer reactions, both positive and negative. This information can be used to improve the product, including highlighting ways to market it more effectively or in conjunction with other products.

Successfully launching a product is a difficult task. It requires the proper company focus, well-coordinated functional units and motivated employees. Communication between the functional units can assist in not only creating the best products but also moving them into the market in a timely manner.

Steve Siembieda is former assistant marketing director for Kemin Nutrinsurance (www.kemin.com) and now COO of Advanced Analytical (www.aati-us.com).

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AAFCO news, part 2

Last month, I reported on some of the pertinent happenings from the annual meeting of the Association of American Feed Control Officials (AAFCO), held in August. This month includes news from other AAFCO committees that may affect the petfood industry.

Dual declarations

The Model Bill & Regulations Committee (MBRC) rectified a matter regarding policy statement #29. If passed, this policy would allow for certain claims relating to nutritive value of ingredients on petfood labels without prompting the need for supportive guarantees for those nutrients. Unfortunately, the proposal to accept the policy came to AAFCO's board of directors through the Pet Food Committee, not MBRC, so it was turned down for procedural reasons. MBRC has now sent the proposal to the board.

After discussion, MBRC accepted draft language to amend the Model Bill, model animal feed and petfood regulations to require net quantity declarations in both avoirdupois (e.g., pound, quart) and metric units. The Food and Drug Administration had proposed amendments to federal regulations to implement these requirements under the Fair Packaging and Labeling Act in the mid-1990s.

For some reason, the proposed rule was never finalized, even though dual avoirdupois-metric declarations have become the standard. Assuming these amendments are eventually enacted by AAFCO, they should help clarify the issue for both regulators and industry.

Carb considerations

The Carbohydrate Working Group under the Feed Labeling Committee (FLC) recommended that policy statement #1 stay as is, effectively consider-

Committees discussed key proposals such as a possible shift in the oversight of animal feeds.

— David Dzanis



ing “carbohydrate” guarantees as misleading in that the term is too broad to be meaningful to the consumer.

However, the group also recommended that the AAFCO Feed Term Definition for “starch” be amended to better describe its nutrient content and that new feed term definitions be established for “sugars” and “fructans.” These steps would allow for guarantees for these components—e.g., “sugars and starch (max). ... 11%”—thus providing a means to include carbohydrate-related information on the label. While FLC accepted the recommendations, this item has to go to the AAFCO board for further action.

Also important to note, there's been no discussion to date as to applying descriptive terms to these nutrient components, e.g., what constitutes “low sugars and starch.” So, without a consensus on that aspect, the prudent approach initially would be for any associated claims to be comparative in nature (e.g., “___% less sugars and starch than ___”).

Raw milk requirements

FLC also accepted proposed amendments to impose labeling and other requirements on raw milk products sold as

animal feed. New labeling requirements would include a very prominent “not for human consumption” statement with additional warning regarding the potential for presence of harmful microorganisms in the product.

The new regulations would also require the products be decharacterized via addition of food coloring, be sold only in containers so they do not resemble human milk products and not be sold at retail in the vicinity of human milk products. This all appears to have been done to address some states' concerns regarding sale of raw milk under the guise of animal feed but in fact intended for human consumption.

While the feasibility of the minimum size of the required warning statement was discussed, there was little other objection. However, I do not believe any manufacturers that would be directly affected by the new regulations were present at the meeting.

Shift in oversight?

The Feed Manufacturing Committee put final touches on the draft Model Good Manufacturing Practices (GMPs) for Feed and Feed Ingredients document before sending it to the board and MBRC. If eventually enacted, this new set of regulations would represent a major shift in how animal feeds, including petfoods, may be subject to oversight by feed control officials.

More from AAFCO

Read part 1 of Dave Dzanis' roundup on the AAFCO annual meeting at www.petfoodindustry.com/0710insights.aspx.

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Presently, only medicated feeds and low acid canned foods are subject to GMPs. These new regulations would require that all feed facilities meet specified manufacturing standards, including how they process feeds, store and transport ingredients and final products, maintain sanitation and keep records.

The Model Bill has always identified adulteration as a prohibited act, but enforcement has largely consisted of inspection and testing of the end product, with little regulatory emphasis on the process by which the product got there. The new regulations would now include process control requirements as well as

Dual avoirdupois- metric declarations have become the standard.

product requirements, and as I interpret it, not following them could be considered evidence of adulteration by itself.

For example, if an inspector found that a facility failed to follow adequate sanitary procedures to minimize the risk of adulteration with pathogenic microorganisms, that finding could be interpreted as a *de facto* sign of adulteration, even without testing the end products. Even if my interpretation is overreaching the regulations' intent, it's clear that firms will be subject to a host of manufacturing stipulations that weren't looked at with much importance before.

Not related to recalls

Development of these GMP regulations was initiated years before the petfood contamination incident this year. Because of that incident's unique circumstances, it's likely that even if the regulations had been in place, they would not have prevented the problem.

Regardless, these measures appear prudent and, in my estimation, for the most part reflect the commonsense procedures manufacturers should be following anyway for their own protection, whether or not dictated by regulation. ●

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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DL-methionine: several vital functions

Methionine is one of the 10-plus essential amino acids that are required by both the cat and dog. It is a non-polar, glucogenic amino acid and, according to the 2006 US National Resource Council (NRC) report, it is typically the first limiting amino acid in cat diets and the first or second limiting amino acid in dog diets.

A partial explanation for its first or second limitation status is due to its ability to donate or receive constituent groups. At the whole-animal level, methionine is part of body proteins and is important for skin and coat condition, eye health, heart health and more. At the metabolic level, methionine is a methyl (CH₃) group donor through formation of the co-enzyme S-adenosylmethionine necessary for methyl group transfer. It is a sulfur donor and thereby an indicator of B-vitamin status.

Methionine is also an initiator of protein synthesis. It serves as a precursor to other amino acids like cysteine which can then be converted into taurine. Methionine can also be converted into glutathione, an important physiological antioxidant, and into the cat pheromone felinine. It is an amino acid that is vitally important to the long-term health of the dog and cat.

Dietary methionine

Common petfood ingredients rich in methionine include animal proteins such as meat and poultry and their associated protein meals, egg products, marine proteins such as fish and fish meals, corn co-products such as corn gluten meal and brewers dried yeast.

Methionine has been used in cat diets to help support urine acidification.

— Greg Aldrich



Many diets that contain these ingredients are adequate in methionine and do not require any supplementation. For diets that contain minimal amounts of meat proteins, are heavily weighted to vegetable proteins like soy or are low calorie foods diluted with inert ingredients such as cereals and cellulose, there may be a need for supplemental methionine.

There are also some petfoods in which the basal diet is likely more than adequate in methionine, but contain supplemental methionine as well. This may occur for several reasons, not all of which are to meet the animal's minimum requirements. Probably the biggest reason is to demonstrate to those purchasing the petfoods that it addresses the amino acid needs of the cat (predominately) and dog.

Secondly, some do so to help promote the palatability of the diet, as cats have been reported to have an "appetite" for methionine. In addition,

methionine has been used in cat diets to help support urine acidification for those with concern regarding urinary tract health. It can also be used as a substitute for a portion of the dietary choline.

Complex chemical synthesis

Unlike many of the other amino acids, a fermentation method to produce methionine has not been developed—though many have tried. Instead, supplemental methionine is produced in a complex chemical synthetic process. There are numerous companies and locations around the world that produce DL-methionine commercially; and there are hundreds of patents that describe the subtle nuances regarding DL-methionine synthesis and purification.

Regardless of company, geography or patent, the general process is fairly similar and yields a racemic (50:50) mix of D and L isomers. Animal tissues require the L form for active protein synthesis. The D form can be inverted and effectively utilized by both the dog and cat. Conversion of the D form to the L form has been reported to be approximately 80-90% in cats.

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The starting materials for production of DL-methionine are acrolein (a 3-carbon aldehyde) derived from propylene (a petroleum derivative), methyl mercaptan derived from methanol and various sulfur sources and hydrocyanic acid (HCN). Acrolein and methyl mercaptan are reacted to form a relatively stable intermediate, 3-methylmercaptopropionaldehyde, known as MMP. The MMP is then reacted with HCN to form a rudimentary mix of DL-methionine and contaminants which is further refined through clean-up steps.

In general, there are two principal commercial products available in the petfood and feed market, a dry crystalline DL-methionine (99% purity) and a liquid hydroxy-methionine analog (HMA; 88% purity; chemically known as 2-hydroxy-4-(methylthiol) butyric acid). Other forms also available, but seldom encountered, include a calcium-bound dry hydroxy analog (86% purity) and a sodium salt (DL-methionine Sodium; 45.9% purity).

Use in petfood

Crystalline DL-methionine has become the standard of the petfood industry. It is a white to light tan free-flowable powder. It fits well with the small and intermittent formula-dependent use of supplemental methionine needed by many companies.

While less expensive, the HMA is a corrosive liquid that requires specialized equipment and plumbing for addition to the ingredient mix. Thus, use of HMA is more suited for mills in which methionine is applied at a constant and significant level.

Further, HMA requires physiological oxidation and transamination (addition of nitrogen) in the liver of the animal to become DL-methionine. For this reason, HMA is often considered to be less biologically available than crystalline DL-methionine. However, studies in dogs indicate that on a molar basis the two forms of the ingredient are the same. Both of these products, while starting from very caustic materials, are

relatively stable in standard food processing conditions, during time on the shelf or during exposure to normal environmental conditions.

So, the decision regarding the DL-methionine source to use falls not to nutrition concerns, but to cost, handling and labeling considerations. ●

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, E-mail: aldrich4@cox.net.

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How is the US market trending?

This year we have experienced many positive and not so positive social and economic factors that have impacted the US petfood market. Now that we're in the fourth quarter, let's look at the state of the market and future trends.

Reaching nearly US\$25 billion in sales for 2007, the US petfood and pet supplies market has grown by 54% in current terms and 35% in constant terms since 2002, according to Mintel. Given what we have seen, heard and experienced, the five-year prognosis is forecasted to be bullish, with total US sales of petfoods and pet supplies expected to grow at an annual average rate of 7.3% in current dollars and increase 4.7% per annum after adjusting for inflation.

The market dynamics this year were fueled by increased retail competition via channel switching and consumer tastes, as customers purchased more premium pet consumables for the past three years.



The five-year prognosis is forecasted to be bullish.

— Huntley Manhertz, Jr.



Sales through mass merchandisers and pet special stores were major contributors to the overall sales growth in 2004 and 2005, with these channels acquiring more market share from traditional grocery stores. Mass merchandisers offered pet owners lower prices and a wider variety of products, while pet specialty stores offered a wider variety of products and a wider price range.

Movement due to recalls

In addition, this year witnessed a variety of quality concerns about petfood

with the massive recalls in the spring. Despite that, this year's category sales are expected to be higher than last year's. The recalls did not push consumers out of the market for obvious reasons: Pet owners still needed food for their pets. Hence, this episode only fueled cross-subcategory purchases, from segments impacted by the recalls to segments where there was no impact. In addition, re-evaluating the affected segments shows that losses due to the recalls were limited to a small group of brands, most of which were low-margin items.

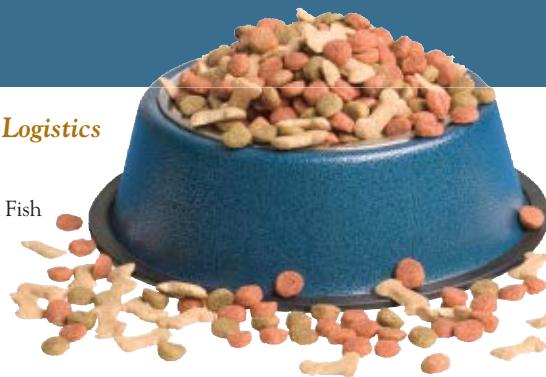
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Evidence from both retailers and manufacturers indicates that a notable share of concerned petfood consumers switched to more expensive natural and organic foods in response to the recalls (16%, Mintel says). This movement would serve to sustain market sales.

Pampering technology

Innovation and personalization have encouraged pet owners to continue to pamper their pets more than they did even a year ago. Technology also plays a major role in the lives of some pet owners. For example, after reading a 52-page user guide, a pet owner can use the automated Perfect Petfeeder to set the feeding time and amount of food for a pet.

Impact of older pets

Wellness is another trend that will drive growth. According to an October 2007 article in *Prepared Foods*, a significant percentage of US pets have reached the mature lifestage—15% of dogs and 17% of cats are over the age of 11.

In the short term, a large number of doting owners will pay a premium for products and services that enhance and lengthen the lives of these pets. For some this will likely include the purchase of more expensive lifestage and condition-specific foods, supplements and treats, like those that address joint and digestive health, as well as those that maintain vision. One example is Purina One Adult Dog Total Nutrition, said to ensure the health of the immune system, bones and joints, digestion, skin, coat, eyes and teeth. ●

Dr. Huntley Manhertz Jr. is a CPG 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

Need more fatty acids?

“Petfoods are manufactured to maintain the health of healthy pets and already contain adequate essential fatty acids (EFAs),” says Dr. John Bauer, a professor of clinical nutrition at Texas A&M University’s College of Veterinary Medicine. “But some pets may need more EFAs in their diet from time to time.” Bauer is one of the authors of a study investigating the role of EFAs in canine skin health.

“The best example is how a dog with dry, maybe scaly skin, would benefit from having some additional oil containing EFAs added to its diet,” Dr. Bauer says. “But, pet owners should not self-medicate. A veterinarian should recommend an appropriate amount of oil to be added to the diet.”

Dr. Bauer and his colleagues fed dogs with skin and coat problems dry petfood mixed with higher amounts of oil and noticed improvements in about

28 days. The most noticeable improvements were seen at seven weeks.

Source: Kirby, *et al*, 2007. *JAVMA*, Vol. 230, No. 11, pages 1641-1644.

Key Concepts

► Need more fatty acids?

(Kirby, Hester, Bauer, 2007): Petfoods contain enough essential fatty acids (EFAs) for most pets. But, some pets may need more EFAs in their diet.

► Improving cognitive function

(Milgram, *et al*, 2007): Long-term maintenance on alpha-lipoic acid and acetyl-L-carnitine may be effective in attenuating age-associated cognitive decline by slowing the rate of mitochondrial decay and cellular aging.

► Kitten milk intake constant

(Hendriks and Wamberg, 2007): The milk intake of suckling kittens remains relatively constant throughout the first four weeks of lactation.

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Improving cognitive function

Nutritional supplements have successfully been used to improve the memory, ability to learn and cognitive function of old dogs—and might be able to do the same thing with humans. This according to a new study published in the *FASEB Journal*, produced by the Federation of American Societies for Experimental Biology.

In this study, Beagle dogs between 7.6 and 8.8 years of age received a twice daily supplement of alpha-lipoic acid (LA) and acetyl-L-carnitine (ALC) over two months. They made significantly fewer errors in reaching the learning criterion on two landmark discrimination tasks compared to controls administered a methylcellulose placebo. This research suggests that long-term maintenance on LA and ALC may be effective in attenuating age-associated cognitive decline by slowing the rate of mitochondrial decay and cellular aging.

The study builds on similar findings made several years ago, done with mice and published in *Proceedings of the National Academy of Sciences*. In that research, the activity and energy level of old rats taking these same supplements almost doubled, and memory and cognitive function improved.

Source: Milgram, *et al*, 2007. Oregon State University press release.

Kitten milk intake constant

The daily milk intake of 14 domestic short-haired kittens from five litters was estimated during 1–4 weeks postpartum using the isotope dilution technique. Kittens received a single intraperitoneal injection of tritiated water, and blood samples were obtained from the jugular vein for radioactivity measurements at 2 and 96 hr. after in-

jection. One kitten in each litter was used as a control to allow calculation of recycling of tritiated water. The mean (\pm SEM) biological half-life of tritiated water in the kittens increased from 2.4 ± 0.1 d in week 1 to 4.9 ± 0.2 d in week 4 postpartum. Recycling of tritiated water accounted for (mean \pm SEM) 5.9 ± 0.8 , 12.0 ± 0.5 , 7.7 ± 1.3 and $10.0 \pm 1.3\%$ of the kittens' daily water intake during postnatal week 1–4, respectively. Daily milk intake of the kittens during 1–4 weeks postpartum was 47.3 ± 0.8 , 47.4 ± 1.5 , 48.7 ± 1.6 and 43.7 ± 2.0 g, respectively. There was no effect of gender on milk intake.

The daily metabolizable energy requirement of suckling kittens, estimated by multiple regression analysis, was $356 \text{ kJ/kg}^{0.75}$, whereas the metabolizable energy required per gram of gain was estimated to be 7.8 kJ/d . The milk intake of suckling kittens remained relatively constant throughout the first four weeks of lactation, and during this period, they seemed to have a lower en-

ergy requirement for maintenance.

Source: Hendriks and Wamberg, 2007. *J. Nutr.* 130: 77-82.

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Product News



Double Planetary Mixer for vacuum mixing

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Slider technology for large format bags

The Zip-Pak Slider is specifically designed to enable brands featured in large format bags to provide consumer convenience, while maintaining package integrity. According to the company, the Slider is the first of its kind to be applied without the need for package alteration or modification to equipment. The Slider is meant for packages ranging from 1 to 55 pounds. The technology can be used on multi-wall paper and laminate pouches, and is the only slider system available for use on woven pouch formats.

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Newly designed tine dough feeder

The Peerless Tine Dough Feeder has been re-designed for enhanced sanitation and maintenance, according to the company. Meant for dry and/or agglomerated doughs, the Tine Dough Feeder efficiently breaks, spreads and forwards the dough for even feeding of downstream dough-forming machines. Designed and certified to BISSC stan-



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dards, the machine's components can withstand washdown sanitation. The units can be fed by multiple mixers and integrated with the Peerless proprietary Automated Conventional Batch Mixer (ACBM) system.

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Ergonomic extruder

Clextral's Evolum LT 145 extruder offers optimum torque and higher screw speeds for maximum throughput, according to the company. The Evolum LT 145 operates at throughputs from 5-10 tons per hour and incorporates temperature control for managing complex recipes in the processing of premium dry and semi-moist petfoods. The machine includes ergonomically designed anti-slip steel foot mounts, as well as a handrail and foot rail.

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Correction: This product was mis-identified on p. 36 of the October issue. We regret the error.

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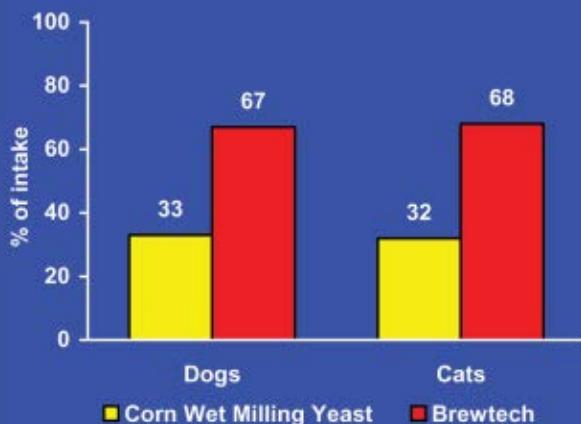
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► **PFIAA Technical Seminar and Annual Dinner**, December 3, 2007, RACV City Club, 501 Bourke St., Melbourne, Victoria, Australia. Contact: John Aird, executive manager, Pet Food Industry Association of Australia (PFIAA), Tel: +61.3.9722.1857, info@pfiaa.com.au, www.pfiaa.com.au.

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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@navc.org, www.tnavc.org.

► **Conference on Pet Food Ingredient Quality**, January 22-23, 2008, Georgia World Conference Center, Atlanta, Georgia, USA. 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, USA. Tel: +1.770.493.9401, www.ipe08.org.

► **PETS International Global PETS Forum**, January 24-25, 2008, Grand Hotel Kempinski, 19 quai de Mont-Blanc, 1211 Geneva, Switzerland. Contact: Corine van Winden, Tel: +31.33.4225833, Fax: +31.33.4225838, corine@pets.nl, www.petsinfo.net.

► **18th Annual Practical Short Course on Feeds and Pet-food Extrusion**, January 27-February 1, 2008, Food Protein R&D Center, Texas A&M University, College Station, Texas, USA. Contact: Dr. Mian N. Riaz, Tel: +979.845.2774, Fax: +979.458.0019, mnriaz@tamu.edu, www.tamu.edu/extrusion.

► **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. Contact: APPMA, 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: Binoy Sahee, Tel: +91.989.101.3797, www.iptf.com.

► **Petfood Forum Asia**, March 5, 2008, Queen Sirikit National Convention Center, Bangkok, Thailand. Contact: Nancy

Grossnickle, Watt Publishing Co., Tel: +1.815.734.5674, ngrossnickle@wattnet.net, www.petfoodindustry.com.

► **Victam Asia**, March 5-7, 2008, 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.

► **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.

► **Petfood Forum**, April 14-16, 2008, Hyatt Regency O'Hare Hotel, Chicago, Illinois, USA. Contact: Nancy Grossnickle, Watt Publishing Co., Tel: +1.815.734.5674, ngrossnickle@wattnet.net, www.petfoodindustry.com.

► **Petfood Focus on Safety**, April 16-17, 2008, Hyatt Regency O'Hare Hotel, Chicago, Illinois, USA. Contact: Nancy Grossnickle, Watt Publishing Co., Tel: +1.815.734.5674, ngrossnickle@wattnet.net, www.petfoodindustry.com.

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► **IFT Annual Meeting and Food Expo**, June 26-30, 2008, New Orleans, Louisiana, USA. Contact: Institute of Food Technologists, Tel: +1.312.782.8424, Fax: +1.312.782.0045, info@ift.org, www.ift.org.

► **AVMA/AAAP Annual Convention**, July 19-23, 2008, New Orleans, Louisiana, USA. Contact: AVMA, Tel: +1.847.925.8070, Fax: +1.847.925.1329, avmainfo@avma.org, www.avma.org.

► **National Annual Pet Industry Trade Show**, September 21-22, 2008, 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.

► **SuperZoo West**, September 24-26, 2008, Mandalay Bay Convention Center, Las Vegas, Nevada, USA. Contact: World Wide Pet Industry Association (WWPIA), Tel: +1.800.999.7295, www.wwpia.org.

► **H.H. Backer Christmas Trade Show**, October 3-5, 2008, Donald E. Stephens Convention Center, Rosemont, Illinois, USA. Contact: H.H. Backer Associates, Tel: +1.312.663.4040, hhbacker@hhbacker.com, www.hhbacker.com.

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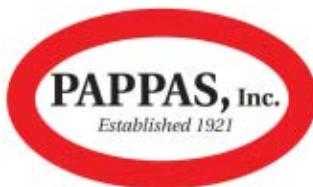
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Ingredients: a tale of two markets

I write this just a couple days after the Pet Food Institute's (PFI) annual meeting, which featured the initial report from the National Pet Food Commission. PFI formed the commission in April to review the petfood recalls happening in the US then and develop recommendations for the industry and government on how to prevent future incidents.

As of our press time, the commission's recommendations were not formally released, but by the time you receive this issue, we will likely have information available on our website (www.petfoodindustry.com) and in our e-newsletters (also accessible on our site). Meanwhile I can share some highlights.

Communication, safety

Many of the recommendations centered around greater interaction and communication among all relevant stakeholders, including petfood manufacturers, government and feed control agencies and the veterinary community.

Another theme was an emphasis, not surprisingly, on food and ingredient safety. This echoed remarks made earlier in the meeting by Stephen Sundlof, director of the US Food and Drug Administration's Center for Veterinary Medicine. He talked about a task force directed by the US president to look at import safety, including for food. (The report from that committee's work is also due soon.)

For me, this was somewhat of a contrast to another petfood meeting I had attended just days before.

Escalating costs

At a seminar held by Wenger Manufacturing in Istanbul, Turkey, for many of its European petfood-producing cus-

Producers around the world are scrambling to find consistent sources for grain-based ingredients.

— Debbie Phillips-Donaldson

tomers, discussion during meals and breaks focused on the escalating cost of ingredients, caused by high demand and declining supplies.

Only one person mentioned that the US recalls had an effect on his business; everyone else was worried about how long their companies could continue to absorb those high ingredient prices without passing them along to consumers. Or, if they are already passing them along, whether the humanization and premiumization driving sales growth in mature petfood markets has a ceiling: Just how much will owners be willing to pay for their pets' food?

Feeling more pain

Coincidentally, the issue of *USA Today* (October 16, 2007) I read on my flight home from my travels included an article on the cost of grain-based ingredients and how that was affecting food-related industries worldwide. The article confirmed what I had heard during the Istanbul event: European food producers are feeling additional pain because European Union policies on imports are much more stringent than those in other parts of the world (for example, not allowing genetically modified grains).

The article also said that produc-

ers around the world—including in the US—are scrambling to find consistent sources for grain-based ingredients as crops are affected by bad weather, the increasing human population spurs demand and a growing emphasis on biofuels gobbles up crop yields.

Turning to China?

Will US petfood producers eventually find ingredient shortages and high prices a bigger problem than safety? Will more producers around the world—including even in Europe—be forced to turn to places like China, the source of the contaminated ingredients behind the US recalls, because of its more abundant supplies? ●

Tell us what you think

If you have insights or ideas as to where this situation is headed, please share them. Post your thoughts on our Discussion Board at www.petfoodindustry.com/discussions.aspx or e-mail them to editor@petfoodindustry.com.

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



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