

March 2008

Petfood WATT Industry



Guide to Petfood
Forum and Focus
on Safety

PETFOOD Forum

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Cutting carbon
footprints: 5 steps

Natural sales rising

Keep a lid on it:
Packaging integrity

Unleashing seasonal petfoods

Roman Versch of
Seasons Pet Foods Co., p. 24

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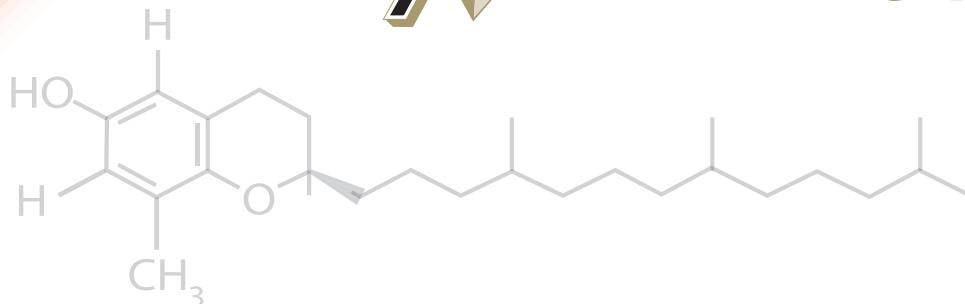
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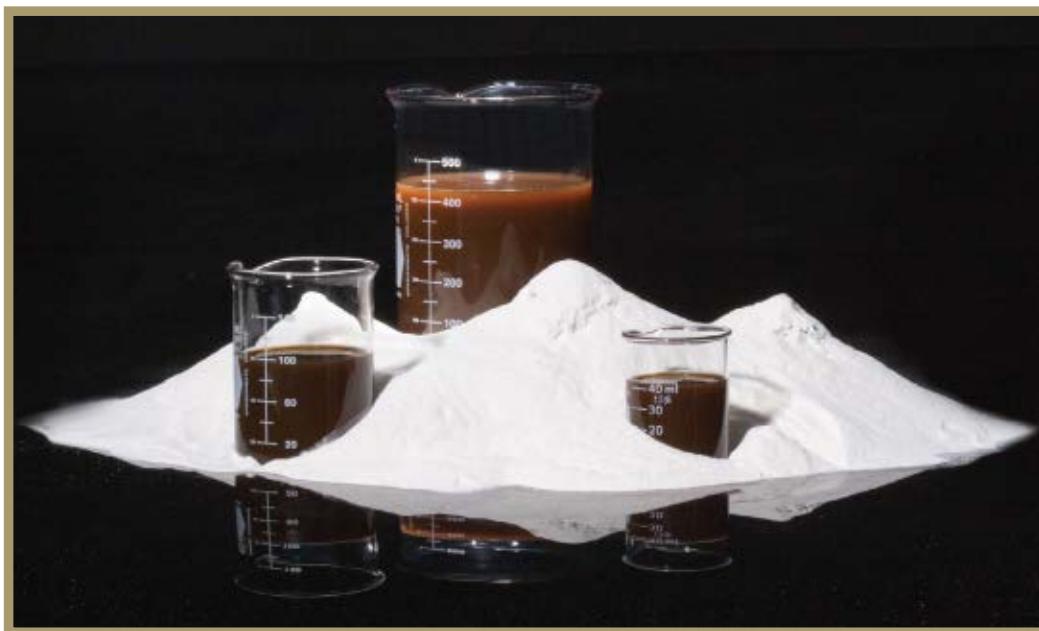
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On the cover: Roman Versch of Seasons Pet Food Co. with Moose the Lab and Molly.

Photo by Michael Justice
(www.michaeljusticephoto.com).

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Drama at the AVMA

It all began for the American Veterinary Medical Association (AVMA) on Friday, March 15, 2007, at 4:15 pm. No, AVMA was not notified by the government, but by a call from a veterinarian employed by Proctor & Gamble (Iams).

"In no time, our phones were ringing off the hook," says Kimberly May, DVM, AVMA's assistant director of professional and public affairs. "The public and the press were calling us and we were receiving E-mails by the hundreds," says May. "People were confused. People were angry. People were panicking. People were sad and grieving. Unfortunately, we had very little information to share in the beginning."

May recently reported on "The veterinarian's role in the petfood crisis" at an ingredient quality conference at the International Feed Expo in Atlanta, Georgia, USA. Following is some of what she had to say.

The front lines

Veterinarians were on the front lines of the recalls in many ways. They got questions from the public, because they were readily available. The media called the AVMA, wanting experts on nutrition, kidney disease and quotes from the AVMA. They wanted the AVMA to explain what the government and industry had said, and put everything in context for pet owners.

At the national level, AVMA had a duty to communi-

Looking for some good that came out of the tragedy, AVMA points to several positive outcomes.



— Tim Phillips

cate as accurately and rapidly as possible with its members and the public. AVMA staff developed a list of recalled products, easily accessible from its website (www.avma.org). Toward the end of the recalls, the list was more than 60 pages long. The AVMA's petfood recall web pages experienced heavy traffic, with page views on one day reaching more than 120,000.

AVMA developed press releases, resources for members and the public, guidelines for treatment and sample collection. One of pet owners' biggest demands was for feeding options, so in cooperation with the American College of Veterinary Nutritionists, AVMA developed recipes for homemade pet diets for short-term use.

Positive outcomes

At first, veterinarians were out of the loop. "Veterinarians weren't initially invited to play a role in this crisis, we elbowed our way to our place at the table," says May. "We found out through the grapevine about conference calls. We called the FDA directly. We called petfood companies and the Pet Food Institute," she says. "We simply wouldn't go away until they realized we should play a major role in responding to this crisis." Once AVMA was included it did in fact play a major and positive role.

Looking for some good that came out

of the tragedy, AVMA points to several positive outcomes:

- ▶ Increased communication with industry, and industry recognition of the role of veterinarians in animal-related issues.
- ▶ Increased communication with the government and governmental acknowledgment of the role of veterinarians in animal-related issues.
- ▶ Increased cooperation with specialty groups, such as the American Association of Veterinary Laboratory Diagnosticians, the American College of Veterinary Nutritionists and the American College of Veterinary Pathologists.
- ▶ Federal legislation to improve petfood safety and speed recognition of problems.
- ▶ Increased industry recognition of the power of human-pet bonds.
- ▶ Industry-developed recommendations for increased communication and cooperation.

Also, says May, a key outcome is that the AVMA is determined it will no longer wait to be invited to the table when animal issues are at stake. ●

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



Veterinarians were on the front lines of the recalls in many ways.

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Quick hits

- ▶ Dinnissen Process Technology has launched its new website, www.dinnissen.nl.
- ▶ Nature's Logic has established new US distribution with Veterinary Service Inc. for Southern California and Nevada, as well as with Premier Distributing covering Missouri and Arkansas.
- ▶ DuPont Liquid Packaging Systems has sold its performance films business segment and its Whitby, Ontario, Canada operating facility to Exopack Performance Films.
- ▶ Procter & Gamble Co. and NBC Universal have partnered together to launch www.petside.com, an online site for dog and cat owners.
- ▶ Pets at Home is exploring a possible sale or initial public offering after doubling profits over the past three years under the ownership of buyout firm Bridgepoint.

Petfood supplier firms indicted

Two Chinese businesses and a US company were federally indicted in February in reaction to the spring 2007 petfood recalls. Xuzhou Anying Biologic Technology Development; Suzhou Textiles, Silk Light Industrial Products Arts and Crafts I/E; and ChemNutra were charged in two separate but related indictments.

One of the indictments charges Xuzhou Anying Biologic and Suzhou Textiles with 13 felony counts of introduction of adulterated food into interstate commerce and 13 felony counts of introduction of misbranded food into interstate commerce. The indictment also names Mao Linzhun, Xuzhou's owner, and Zhen Hao Chen, Suzhou's president.

The US side

ChemNutra and company owners Sally Quing Miller and her husband, Stephen S. Miller, were charged with 13 misdemeanor counts of introduc-

tion of adulterated food into interstate commerce, 13 misdemeanor counts of introduction of misbranded food into interstate commerce and one felony count of conspiracy to commit wire fraud.

The indictments allege that Suzhou Textiles mislabeled 800 metric tons of tainted wheat gluten manufactured by Xuzhou to avoid inspection in China. Suzhou then did not properly declare the contaminated product it shipped to the US as a material to be used in food, the indictment states.

It also says the shipment was falsely declared to the Chinese government in a way that would avoid mandatory inspection of the company's plants. Xuzhou added the melamine to artificially boost the protein content of the gluten to meet the requirements specified in Suzhou's agreement with

ChemNutra.

Steve Stern, a spokesman for ChemNutra, said, "The Millers deny the allegations by the Justice De-



partment in the strongest terms and look forward to the opportunity to prove their innocence at trial."

The Chinese government is cooperating with the investigation and shut down Xuzhou shortly after its connection to the tainted melamine was discovered. The US, however, doesn't have an extradition treaty with China, meaning there is no legal way to force China to hand over Linzhun or Chen.

Take the *Petfood Industry* survey!

Does your company have official initiatives and measurable objectives in place for reducing its carbon footprint? Tell us what you think about that and the articles in this issue. Go to www.petfoodindustry.com/monthlysurvey.aspx.

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PETFOOD INDUSTRY GLOBAL

Successful start for Interzoo 2008.

Most of the leading companies in the pet supplies industry have already booked a stand at Interzoo 2008, taking place in Nuremberg, Germany May 22-25. 1,100 companies worldwide, including industry leaders, have already registered.

“There are more than 250 new exhibitors from all continents and countries. The present display space already exceeds the space booked at Interzoo 2006,” says Klaus Oechsner, president of the German Pet Trade & Industry Association (ZZF), the honorary sponsor of the exhibition.

Interzoo is aimed at buyers from the pet products trade, veterinary surgeons, pet boarding houses, pet grooming salons and official agencies. Over 34,000 trade visitors from 108 countries came to Nuremberg for Interzoo in 2006, including the top buyers from the large trading companies in Germany and abroad.

Name change and top award for GA Petfood Partners. GA Pet Food Partners is the new name for Golden Acres, a manufacturer of private label premium dry petfoods. Ben Helm, sales and marketing director for GA Pet Food Partners, said, “Partnership is what we’re about. We work with some of the biggest petfood brands in the world—and some of the smallest ones, too. But, unlike many of our competitors, we don’t believe in having our own brands. That’s because we see ourselves as a partner, not as a competitor, to our customers.”

The rebranding has also coincided with the news that GA Pet Food Partners has been awarded a Grade A from the British Retail Consortium for quality—the highest grade possible. GA Pet Food Partners’ new website is www.ga-petfoodpartners.co.uk.





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INDUSTRY CALENDAR

April

S	M	T	W	T	F	S
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UK Pet Care Forum

2008, April 13, 2008, The Belfry, Wishaw, Sutton Coldfield, United Kingdom. Contact: Marie Petsis, Pet Care Trust, Tel: +01.234.273933, Fax: +01.234.273550, petevents@petcare.org.uk, www.petcare.org.uk.

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.

Alltech's International Feed Industry Symposium, April 20-23, 2008, Lexington, Kentucky, USA. Contact: Alltech, symposium@alltech.com, www.alltech.com.

The 4th International ZooVet-Expo, April 22-24, 2008, International Exhibition Center, 15 Brovarskyi Ave., Kyiv, Ukraine. Tel: +38.044.258.2732, info@troyan.kiev.ua, www.troyan.kiev.ua/en/exhibition/zoovet.

May

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H.H. Backer Spring

Trade Show, May 4-6, 2008, Baltimore, Maryland, USA. Contact: H.H. Backer Associates Inc., Tel: +1.312.663.4040, Fax: +1.312.663.5676, hhbacker@hhbacker.com, www.hhbacker.com.

Interzoo, May 22-25, 2008, Exhibition Centre Nuremberg, Nürnberg, Germany. Contact: WZF Wirtschaftsgemeinschaft, Zoologischer Fachbetriebe GmbH, Tel: +49.911.86.068646, Fax: +49.911.86.068640, interzoo@nuernbergmesse.de, www.interzoo.com.

June

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AFIA Feed Industry Institute, June 16-19, 2008, Crowne Plaza Chicago O'Hare, Rosemont, Illinois, USA. Contact: Judy Pilgrim, Tel: +1.703.524.0810, afia@afia.org, www.afia.org.

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.

A complete listing of 2008 events is available at www.petfoodindustry.com



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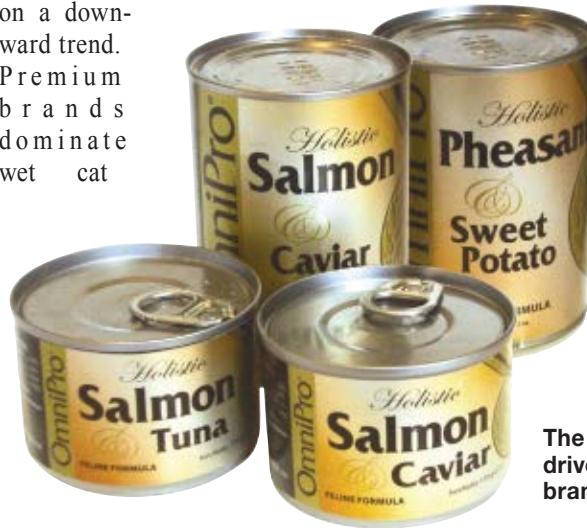
According to www.retailwire.com, growth in the US wet dog food retail sector is coming from smaller cans, and gourmet and premium SKUs. Cans of 6 ounces and less are seeing substantial growth, while 20 ounce cans and larger have recently been on the decline. In terms of price, superpremium and gourmet now comprise just over half of wet dog food sales, with the superpremium segment hitting as much as 10% annual growth in recent years.

The US wet cat food market is being driven by small cans and premium brands as well. Consumers are showing a strong

preference for the smaller sized cans. According to www.retailwire.com, the under 5 ounce cans are the fastest growing SKUs, while the 10 ounce and larger cans are on a downward trend. Premium brands dominate wet cat

food, commanding about three-quarters of dollar sales, with only 15% coming from super premium varieties.

Package types—particularly multipacks—are also seeing rapid gains in both dog and cat wet food. Single cans and pouches still make up about three-quarters of wet dog and wet cat food dollar sales, but new bundled options for pouches and cans are shifting the balance of sales.



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Petfood Forum 2008

April 14-16, Hyatt Regency O'Hare Hotel,
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The petfood market continues its rapid pace of growth, despite recent crises. Find out the best opportunities for expansion and how to lead them in your organization!

Petfood Forum 2008 connects you with the people and information you need to continue to advance. This premier event for the petfood industry features plenty of networking opportunities and exciting 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.

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.



Petfood Focus on Safety

April 16-17, Hyatt Regency O'Hare Hotel,
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Petfood Forum 2008

April 14-16, 2008
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Petfood Focus on Safety

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NOTE: Registrations will not be processed without payment. Rate is determined by date payment is received. Prior to March 1, 2008, attendee registration fees are refundable minus a cancellation fee; contact Nancy Grossnickle at ngrossnickle@wattnet.net or Tel: +1.815.734.5674. Substitution of registered personnel is available at no charge. WATT Publishing Co. reserves the right to substitute speakers and change schedule as necessary. If anyone in your party requires special assistance, please contact us.

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Be sure to identify yourself as a Petfood Forum 2008 or Petfood Focus on Safety participant prior to March 26, 2008, to receive our special group rate. Room availability is limited; reservations will be handled on a first come, first served basis.

THIS MONTH ON PetfoodIndustry.com

Take a moment to stop by www.petfoodindustry.com and peruse this month's collection of Online Extras and our regularly updated content:

- For Colin Mair's original, unedited article on cutting carbon footprints, go to www.petfoodindustry.com/carbon.aspx.
- Listen to a conversation with Roman Versch, founder of the Seasons Pet Food Co. Get the audio from the interview at www.petfoodindustry.com/season.aspx.
- Intrigued by the "Natural sales rising" article? Find more petfood research online! Go to www.petfoodindustry.com for market and nutrition research on petfood in the Featured Research and Research Notes on the homepage.
- To view the latest issue of *The Extru-Technician*, a digital newsletter from Extru-Tech Inc., go to www.petfoodindustry.com/extru-technician.aspx.

Supplement makers want own regulatory category

With a new director of the Food and Drug Administration's (FDA) veterinary medicine center and heightened concerns about dietary supplement safety, makers of dietary supplements for pets are renewing an effort to get FDA to create a separate regulatory category for their products.

Some industry sources say pet supplements are low on the FDA's priority list. The National Animal Supplement Council (NASC) recently submitted to FDA ingredients and accompanying claims that could be part of a regulatory scheme.

Currently animal dietary supplements are considered either food or drugs,

and those considered drugs are technically illegal because they have not been approved. The animal drug industry also wants FDA to crack down on companies

that make unsubstantiated health claims. Pet dietary supplement makers need to be legitimized to get investors to back expanding businesses.

NASC met with FDA officials January 10, 2008. The group submitted to FDA a list of ingredients commonly used in pet health products and statements NASC requires its members use. Also among the ingredients are some that NASC thinks should not be used in petfood or animal health products.



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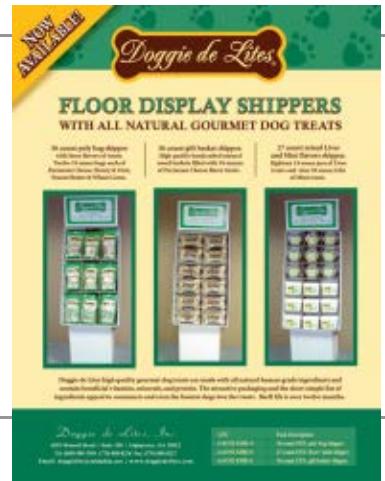


« High protein canine treats

Nature's Logic has introduced high animal protein content treats for dogs. The bone-shaped treats are available in chicken, duck, lamb or venison flavors. According to the company, the product is gluten free and contains high levels of probiotics and enzymes. www.natureslogic.com

Treats arrive in floor display shippers »

Doggie de Lites Inc. offers gourmet dog treats made with 100% USA all-natural human grade ingredients, according to the company. The treats, which come in flavors like Parmesan Cheese, Honey & Oats, Peanut Butter & Wheat Germ, Liver and Mint, are available in three different floor display shippers. One is a 36 count poly bag shipper with three flavors of treats, another is a 36 count gift basket shipper and the other is a 27 count mixed shipper. www.doggiedelites.com



« Specially formulated drinks for animals

Special Waters SAS has introduced Water Cat, Water Dog and Water Little in the US. The range of products has been developed by a team of veterinary nutritionists, and according to the company, the bottled water is the world's first specially formulated daily drinks for dogs, cats, guinea pigs, hamsters, rabbits and ferrets. The products contain natural spring water and other organic/natural active ingredients, and contain no added sugar, salt or artificial flavoring, according to Special Waters. www.specialwaters.com

Treatlike supplements for dogs »

Animal Tech Labs Inc. offers a line of supplement products, OVN Vitamins, an effervescent vitamin formula for dogs. Developed in partnership with DSM Nutritional Products, the formulas are based on DSM's Optimum Vitamin Nutrition (OVN) supplementation program, which takes into consideration vitamin stability, bioavailability and target fortification levels. The supplements are available in three flavors: natural chicken, natural chicken liver and natural bacon jerky. www.animaltechlabs.com



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Feedback

The high cost of low prices

It's been almost a year since the petfood industry faced massive recalls in North America. Since then there has been a lot of discussion about permanently solving "the problem." Potential solutions are new regulations, new committees, new reporting systems, etc. But the root problem, it seems to me, is that financial markets are forcing petfood manufacturers into a situation of extreme cost control.

I ask myself this: "Is the industry prepared to sacrifice the love for pets, to which everybody in the industry pays at least lip-service, for just that little bit of extra profit?" If so, we need only wait for the next disaster to hit. The consequence will be diminishing consumer

confidence in industrially prepared petfoods: our business! Players in the industry might win financial gain, but the industry will not.

If petfood companies are prepared to shoot themselves in the foot for the sake of the quick buck, they will have lost the right to complain about being crippled.

*Marcel Blok, owner
Change Stranamics BV
The Netherlands*

China: a blessing and a curse

Every month *Petfood Industry* conducts an electronic survey of our readers. (For the current survey, log on to www.petfoodindustry.com/

[monthlysurvey.aspx](http://www.petfoodindustry.com/monthlysurvey.aspx).) In December, we asked respondents if they thought their country's economic relationship with China has been beneficial overall? Of the 55 readers responding, 11 did not have yes or no answers. Of the remaining 44, 50% said yes and 50% said no. Examples of respondents' comments include:

- That's a complicated question. I think Americans have benefited from low-cost products, but have also been lulled into a sense of complacency about product safety.
- I think so. In both ways, import and export. Switzerland is importing Chinese products at low prices (like everybody else) and Switzerland exports many highly technical and high-quality products to China.

They agree at one point: Union Pack's packaging makes their pet food look much better.



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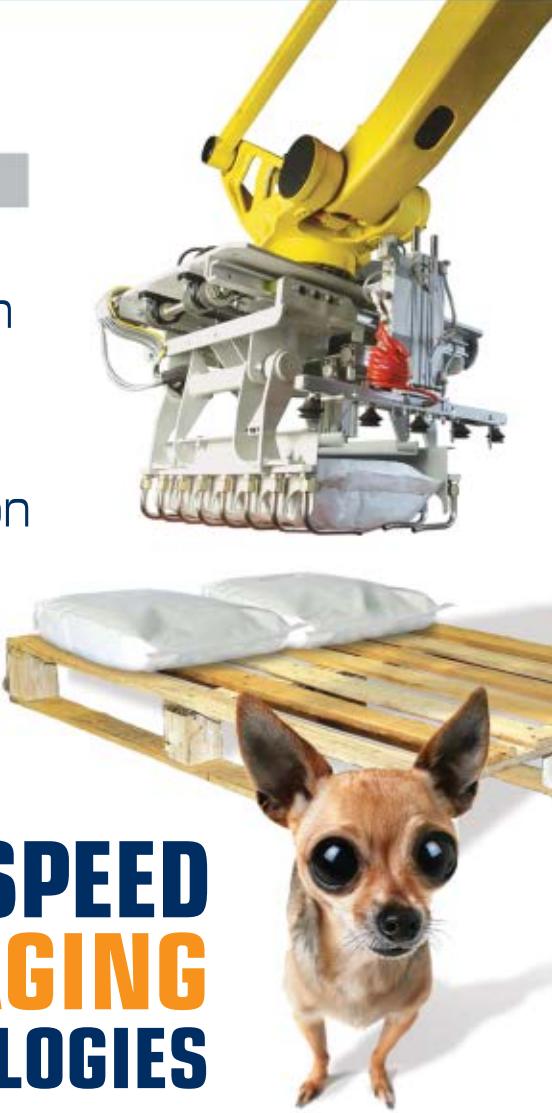
- Yes, but we are getting lazy and not keeping up with China, we are relying on them too much.
- No, Chinese products flood the Philippine market and we cannot compete with them.
- With the recalls and lax regulations in China vs. Canada, it

would hurt us to have more dealings with China.

Better enforcement

In January, we asked respondents if new US regulations are needed to ensure petfood safety? Examples of respondents' comments include:

- We just need better enforcement of existing regulations.
- Yes, because we now have the ability to import from all over the world and all countries do not have the same safety standards for petfood. One must consider cultural aspects because pets are not rated very highly everywhere, so the chance of importing substandard ingredients is very high.
- No. Industry needs to take action—not government.
- Yes, basic safety criteria should be established by the government and exporters should be required to prove they meet those criteria. Then, the buyer can use the documentation to confirm the raw ingredient was tested. This will create a paperwork trail and liability platform for the raw ingredient exporters. If there are problems with the safety of those ingredients and tests reveal deceptive practices, then the government should ban that company from exporting to the US.
- Absolutely, particularly for imported foods and ingredients. The recent tainted wheat gluten from China is all the rationale I need.
- I think that because of the recalls in 2007, the public is demanding more protective measures. As an industry we must meet these demands.
- Yes. New regulations are needed to win back consumer confidence, but the issues facing our industry come from a lack of enforcing the current regulations.
- No, but the US needs to enforce safety regulations more stringently. Suppliers must comply with US regulations.
- No, current regulations are sufficient. Attention to quality of ingredients should be highest on the agenda.



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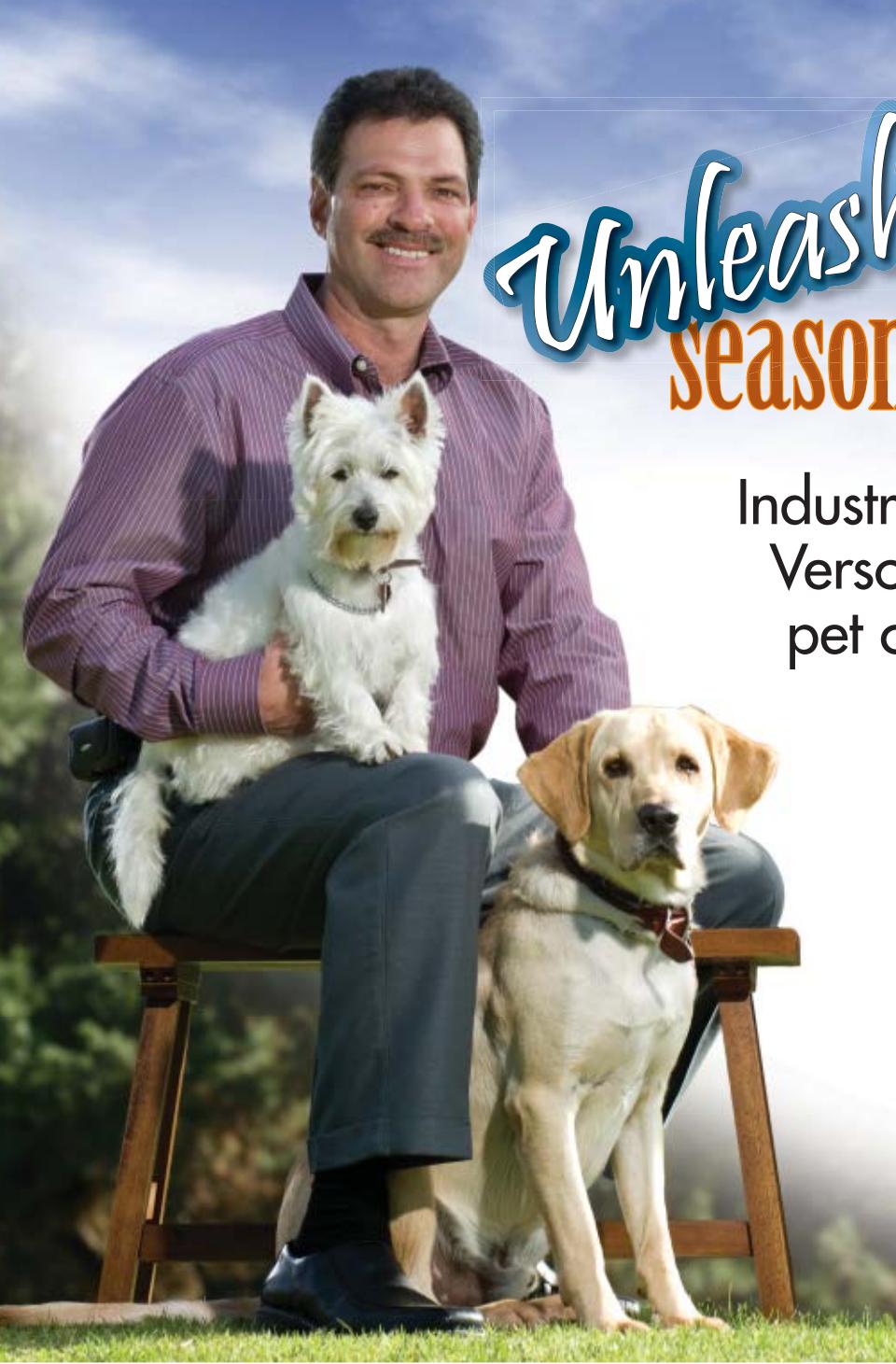
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Unleashing seasonal petfoods

Industry veteran Roman Versch thinks pets and pet owners are ready for winter and summer formulas

BY TIM PHILLIPS, DVM

Roman Versch says he has kibble in his veins. He first joined the pet industry in 1971 when he began working for a pet retailer in Los Angeles.

“Seasons change and so should your pet’s food,” says Roman Versch, owner of the Pet Depot chain of pet stores. Why? “In the summer, dogs need higher levels of linoleic acids and omega oils in a lower protein and fat formula,” says Versch. “In the winter, dogs need higher levels of protein and fat.” As evidence he points to Chapter 11 of the 2006 NRC publication *Nutrient Requirements of Dogs and*

Cats. Versch will soon find out if pet owners are going to buy the concept.

“Shedding is a profound and obvious effect that seasonal changes have on dogs and cats,” notes Versch, “but it is by no means the only one.” He points out that the seasons are a powerful force in our lives. They affect the activities we do, the foods we crave, the clothes we wear and often, the moods we are in. “Our animals are also affected by seasonal changes,” he says.

A patent and licensing

Working with nutritionists, Versch developed petfoods to address seasonal changes. In October 2006, the US Patent Office awarded him a patent entitled

Online extra!

Listen to a conversation with Roman Versch, founder of the Seasons Pet Food Co. Go to www.petfoodindustry.com/season.aspx.

“Selected Climate Change Control of Petfood Formulation and Distribution.” Following up on his patent, Versch founded Seasons Pet Food Co. with the idea of selectively licensing his formu-

“No one was asking for iPods or jet skis, but millions of people are buying them now.”

las to companies capable of global and multi channel petfood distribution. He plans to unleash the concept one way or another by August 2008.

A new path

“Superior ingredients nutrition is a well-worn path in the US,” notes

Versch. “Customers must have a powerful reason to switch from brands they are satisfied with and current petfood leaders in the US will not willingly give away market share.”

He strongly believes Seasons Pet Food Co. is the right company to create a new path based on seasonal formulas. “A survey done by the company shows that the seasons concept is one that 78.6% of consumers are willing to try,” says Versch, “because it makes sense.” When he’s told no one is asking for seasonal formulations, he responds that no one was asking for iPods or jet skis, but millions of people are buying them now.

Versch sees an analogy between seasonal petfoods and hairball control petfoods. “Hill’s Science Diet introduced its hairball formula in 1996 and changed the market overnight,” he says. “Consumers eagerly converted to Hill’s feline hairball formulas with the advantage of natural hairball disposal through food.” Hill’s improved retailer support and created excitement for specialty retailers because the product was not available through mass merchant locations.

Kibble in his veins

“I’ve got kibble in my veins,” comments Versch. He first joined the pet industry in 1971 when he began working for a pet retailer in Los Angeles. There he learned to position and sell petfood products including the original Nutro Pet Food and Science Diet when it was packaged in brown bags and “Acme Buttermilk” kibble from Breeder’s Choice. “As petfood varieties increased,” he says, “consumers became more selective in their petfood purchases. Gradually,

New to the NRC requirements

Entirely new to the 2006 NRC publication *Nutrient Requirements of Dogs and Cats* is a report on the effects of physical activity and the environment on nutrient requirements (Chapter 11). Starting with dogs as athletes, effects of sprinting and endurance activities on nutrient requirements are explored. The effects of temperature, high and low, are examined for energy requirements. Nutrient requirements as a function of amount of exercise and ambient temperatures are discussed for water, protein, fats, carbohydrates, minerals and vitamins (www.nap.edu/catalog.php?record_id=10668).

the industry shifted to natural, holistic trends and breed specific products found on shelves today.”

When working in retail, Versch and others on the staff noticed a pattern every summer: Customers came in desperately seeking advice for helping their pets suffering from dry, itchy coats and hot spots. “We always asked what they were feeding and a pattern of high-protein, corn-based diets emerged,” says Versch. “We further discovered that these customers were often adding canned diets high in protein on top of the high-protein kibble. We recommended lower protein kibble and a skin and coat supplement and many customers came back happy with the results.”

Visible benefits

Versch is confident that pet owners feeding Seasons Pet Food will

Cool Weather Blend is formulated with extra protein and fat to ensure that pets get all the energy they need to fuel their higher energy requirements during cold climatic conditions. It will be sold November through April.

Summer Blend contains higher lineolic acids and omega 3 and 6 oils blended in a lower protein formulation. It will be sold May through October (see www.seasonspetfood.com).



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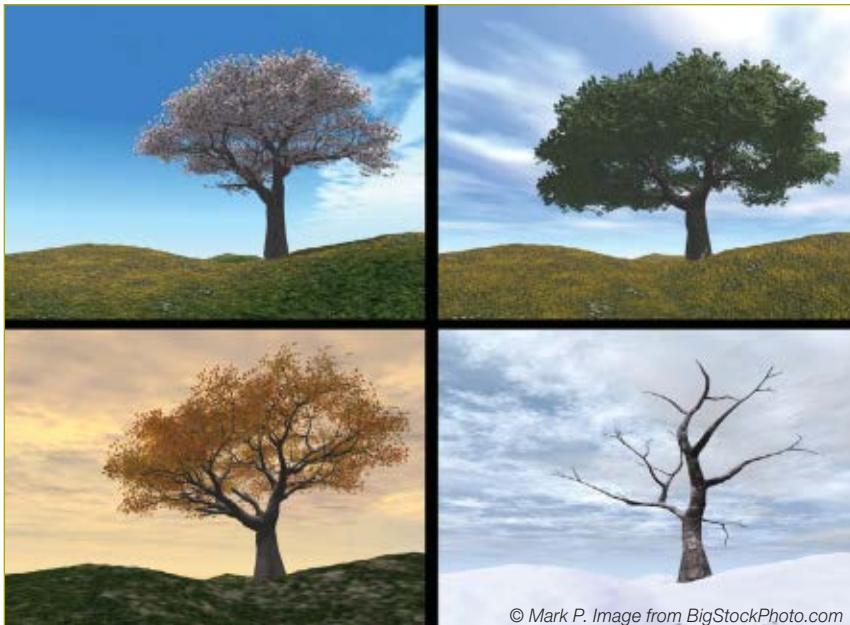
Jan Hall, *Logistics Coordinator*

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The seasons are a powerful force in our lives. They affect the activities we do, the foods we crave, the clothes we wear and often, the moods we are in. Pets are also affected by seasonal changes.

“have a pet with a great coat and better body condition.” He says one

reason why so many pets are overweight is that they receive calories

at a steady rate all year—even when they don’t need as many calories in the summer. “Our formulas increase fat when pets actually need it—on the lower end of the thermo-neutral and critical cold zone,” says Versch. “Fat is decreased when pets least need it during the upper end of ambient temperatures. We also increase very absorbable essential fatty acids which support a healthy coat.” Seasons Summer Blend will be sold May through October. The Seasons Cool Weather Blend will be sold November through April.

These questions remain

For everything there is a season. The seasonal petfood concept is appealing, but are pet owners ready for winter and summer formulas? Do seasons really affect indoor pets that much? Will inventory/stocking be a problem? What benefits will pet owners actually see? Time will tell. ●



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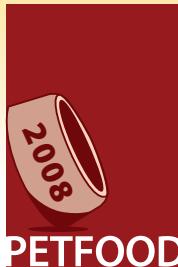


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Guide:



Increase your know-how at these valuable events

Petfood Forum 2008 is once again the meeting place for petfood professionals—an opportunity to learn, network and visit with suppliers. Scheduled for April 14-16 at the Hyatt Regency O'Hare near Chicago, Illinois, USA, Petfood Forum offers so many benefits, you cannot afford to miss it. Again this year, three general sessions are scheduled for Wednesday, April 16, and will include insights from petfood company and pet retailing executives,

plus a panel discussion on new product development.

Following is the most accurate scheduling, topic and speaker information available at press time. Topics in the same time slot are concurrent. For regular updates, bookmark www.petfoodindustry.com/petfoodforum.aspx. For questions, contact Nancy Grossnickle (attendees) at E-mail: ngrossnickle@wattnet.net; Tel: +1.815.734.5674 or Ginny Stadel (exhibitors) at E-mail: gstadel@wattnet.net; Tel: +1.815.734.5691.

Tuesday, April 15 8:00-8:40 am

Complementary technologies: Professor Jean Bouvier examines the advantages and disadvantages of both single and twin screw extruders. He covers what the engineering sciences can add to the discussion.



In-line nutrient analysis: Michael Myrick, PhD, University of South Carolina, explains multivariate optical computing technology and discusses its use in continuous monitoring of the moisture, fat and protein levels in petfood. This new technology allows petfood manufacturers to decrease costs, improve quality and approach true statistical control of their processes.

8:45-9:25 am

Alternative petfoods—fallout from the recalls: David Lummis of Packaged Facts examines changes in the industry stemming from the spring 2007 recalls. He discusses sales of alternative products before, during and after the recalls.



Custodial care of ingredients:



Ed Mareth of 3D Corporate Solutions covers how to source wholesome, high quality ingredients for the finest petfoods and treats. He explains how to develop products, programs and processes to meet a commitment to custodial care of raw materials.

10:15-10:55 am

Global new product trends: Krista Faron, senior analyst for Mintel Custom Solutions, highlights some of the most interesting new petfood product launches in 2007 and looks toward the future.



US regulatory report: Dave Severson, chair of the Pet Food Committee for the Association of American Feed Control Officials (AAFCO), covers mandatory caloric labeling, FDA issues, international trade of petfood ingredients and more.

11:00-11:40 am

The natural and organic markets: Brian Connolly, pack leader at Cas-

tor & Pollux Pet Works, discusses the explosive growth in the natural and organic petfood markets.

Nutritional management of canine hip dysplasia:



Gail K. Smith, VMD, PhD, professor of orthopedic surgery at the University of Pennsylvania, shares his insights on the prevention and treatment of canine hip dysplasia, including dietary management.

1:00-1:40 pm

Covert marking and detecting devices: Peter Gabriele, Armark Authentication Technologies, covers petfood defense steps, including state-of-the-art anti-counterfeit tags and detection devices.



Treat palatability: Aurelie de Ratuld, PhD, SPF's R&D manager for wet petfood and treats, covers the use of palatability enhancers and testing protocols for this large and diverse treat segment of the petfood market.



1:45-2:25 pm

Sustainability and carbon footprints:



Process development expert Colin Mair examines how to investigate and implement a low carbon footprint agenda. For regulatory and financial reasons, these are concepts petfood manufacturers cannot afford to ignore.

Can raw petfoods prevent cancer?:



Dr. Ian Billingham, founder of BARF Australia, presents his theory on what drives neoplasia in companion animals, along with possible solutions for preventing it. He discusses whether raw diets are the answer.

3:15-3:55 pm

Private label petfoods—a global status report:



Lee Linthicum of Euro-monitor International highlights the importance of private label petfoods in regions of the world. He looks at

where private label petfoods are strongest and weakest.

EU regulatory update:



Thomas Meyer, secretary general of the European petfood trade association (FEDIAF), updates what's happening on the European regulatory scene, including the new animal by-products regulation and the feed additives saga.

4:00-4:40 pm

Petfood safety systems:



Quality expert Dr. David Rosenblatt, PDCA Training Solutions, will explore how to implement state-of-the-art petfood safety and quality management systems.

Emerging ingredient trends: Euro-monitor's Lee Linthicum looks at the petfood ingredients rising in popularity, including organic, reliably safe and functional ingredients. Also, he discusses Euro-monitor's new approach to ingredients market intelligence.

Wednesday, April 16—

General sessions

8:00-9:30 am

Executive roundtable: Decision makers from four petfood companies share their insights on the important topics in the petfood industry, including the effect of the spring 2007 recalls, difficult challenges and predictions for the future.

10:15-10:55 am

Pet retailers speak: Executives representing various petfood retailers discuss what might be the next big thing and consumer wants and needs from the pet retailing perspective.

11:00-11:40 am

New product development ideas: A diverse group of experts analyze what it takes to make new product development successful. Questions cover conceiving, feasibility studies, research and marketing.

Petfood Focus on Safety

Petfood Focus on Safety, April 16-17, will follow Petfood Forum 2008, providing a comprehensive, in-depth educational program on the crucial issue of petfood safety. Following is the most accurate scheduling, topic and speaker information available at press time. If you have specific questions, contact Nancy Grossnickle at E-mail: ngrossnickle@wattnet.net; Tel: +1.815.734.5674.

Wednesday, April 16

3:00-3:40 pm

Good purchasing practices: Dr. David Rosenblatt, quality expert for PDCA Training Solutions, covers what it takes to make wise and safe petfood ingredient purchases.

3:40-4:20 pm

Introducing ISO 22000: John Surak, who leads the US delegation to the ISO 22000 international working group, discusses the world's most advanced food safety management system and how it applies to petfood manufacturers.

4:50-5:30 pm

Adverse event reporting and preferred vendors:



Bill Bookout, president of the National Animal Supplement Council, discusses ideas his group has implemented aimed at preventing disaster. He covers how these systems could help the petfood industry.

Thursday, April 17

8:00-8:40 am

Crisis contingency planning: A discussion of preparing for a crisis by practicing for one (mock recalls) and of a logical crisis management flow chart.

8:40-9:20 am

Case study—Natural Balance:



Frank Koch, executive vice president at Natural Balance Pet Foods, covers how the company handled the recall of its products and instituted a "buy with confidence" program.

10:00-10:30 am

Finding the right insurance: Dave Rindom, vice president of human resources for MGP Ingredients, shares his insights into analyzing insurance needs and implementing a comprehensive plan.

10:30-11:30 am

Consumer connections roundtable:

Petfood safety perspectives from a veterinarian, a blogger, a petfood retailer and a pet owner.

Registration link

For online registration, go to www.petfoodindustry.com/petfoodforum.aspx

Petfood Forum 2008 Exhibitors

As of press time, the following companies are exhibiting at Petfood Forum 2008, listed below by category. The number(s) listed with the company name is the booth number. Following the exhibitor list, you'll find contact information received as of press time (listed by company alphabetically), with advertisers in this issue indicated.

Equipment

- 822.....Aeroglide Corp.
- 519.....APEC
- 100.....Baker Perkins Inc.
- 902.....Bliss Industries LLC
- 108.....Bühler Inc.
- 217.....Cablevey Conveyors
- 409.....Cetec Industrie
- 212.....CFS
- 415.....Clextral Inc.
- 619.....Columbia Okura LLC
- 101.....Combitac Limited
- 600.....Conforma Clad
- 316.....Conveying Industries Inc.
- 604.....Coperion Corp.
- 207.....Cozzini Inc.
- 918.....CPM Roskamp Champion
- 920.....CPM Wolverine Proctor
- 103.....Dinnissen BV
- 717.....Drying Technology
- 807.....EDL Packaging Engineers Inc.
- 223.....E.S.E. & Intec
- 408.....Ever Extruder Co.
- 200.....Extru-Tech Inc.
- 713.....Fischbein Co.
- 208.....Food Process Automation
- 603.....Foss North America
- 914.....Geelen Counterflow USA Inc.
- 300.....Harpak Inc.
- 206.....McLanahan Corp.
- 222-223..Pappas Inc.
- 512.....Parsons-Eagle Packaging Systems
- 304.....Pertin Instruments
- 515.....PPI Technologies
- 612-614...Promens, Bonar Plastics & Sæplast
- 602.....Schenck Accurate

- 817.....Selo Food Technology BV
- 707.....Tapco Inc.
- 401.....Weiler and Company Inc.
- 719.....Wenger Manufacturing Inc.
- 815.....Westfalia Technologies

Ingredients

- 900.....3D Corporate Solutions
- 923.....ADF—American Dehydrated Foods Inc.
- 318.....ADM Alliance Nutrition
- 702-704-803-805...AFB International
- 601.....Alltech
- 823.....Ameri-Pac Inc.
- 615.....American Casein Co.
- 214.....BioOregon Protein Inc.
- 703-705...Cargill Corn Milling
- 201.....Cereal Byproducts Co.
- 315.....Dakota Dry Bean Inc.
- 113.....Dakota Organic Products/Hesco Inc.
- 308.....Danisco USA Inc.
- 716-718...DSM Nutritional Products
- 107.....Enzyme Development Corp.
- 102.....Fairview Mills
- 215.....Fiberstar
- 806-808..Gourmetceuticals LLC
- 402.....Griffin Industries Inc.
- 608.....GTC Nutrition
- 305.....International Fiber Corp.
- 801.....International Ingredient Corp.
- 106.....International Protein Colloids Inc.
- 213.....J. Rettenmaier USA
- 419.....Jones-Hamilton Co. SBS-Pet
- 522-523..Kemin Nutrinsurance Inc.
- 912.....LaBudde Group Inc.
- 708.....Marshall Industrial
- 513.....Martek Biosciences Corp.
- 607.....Nealanders International Inc.

- 809.....Novus International Inc.
- 917.....NutraCea
- 909.....Omega Protein Inc.
- 616-618...Penford Food Ingredients
- 518.....Peterson Co. (The)
- 818.....Petfood Ingredients
- 301.....Pizzey's Nutritionals
- 906-908..Poet Nutrition
- 109.....Rose Acre Farms
- 506.....Silva International Inc.
- 509.....Simmons Feed Ingredients
- 406.....Specialty Ingredients Inc.
- 117-119...SPF-USA
- 715.....SunOpta Ingredients Group
- 413.....Scoular Co. (The)
- 216-218-317-319 Trouw Nutrition USA
- 622-623 Tyson Foods Inc.
- 907.....US Commodities
- 205.....Van Druenen Farms
- 802.....Vitalfa LLC
- 812.....Wilbur-Ellis Co.

Packaging

- 322.....Alcan Packaging
- 418.....Altivity Packaging
- 609.....Bancroft Bag Inc.
- 407.....Bemis Company Inc.
- 405.....Bemis Flexible Packaging-Milprint Division
- 307.....Coating Excellence International
- 701.....Exopack
- 903.....Hood Packaging Corp.
- 306.....Mega Embalagens of Americas LLC
- 202-204 .Nordenia USA
- 219.....Pacific Bag Inc.
- 302.....Pactiv Corp.
- 613.....Palmetto Industries

- 312-314.. Peel Plastic Products Ltd.
- 412..... Reuther Verpackung GmbH & Co. KG
- 501..... Sanimax
- 112..... Sealstrip Corp.
- 813..... Union Pack Embalagens
- 819..... Werthan Packaging Inc.
- 203..... Zip-Pak

Services

- 209..... Alabama Power Co.
- 722..... Bachelor Controls Inc.
- 905..... C.J. Foods Inc.
- 712..... Creative Formulation Concepts
- 308..... Danisco USA Inc.
- 605..... Eurofins Scientific Inc.
- 309..... Evanger's Dog & Cat Food Co. Inc.
- 118..... Fibertech Inc.
- 115..... IPE/IFE
- 114-116.. KC Animal Health Corridor
- 709..... Neogen Corp.
- 303..... New Jersey Feed Lab Inc.
- 423..... New Technology Inc.
- 804..... Pet Food Solution Inc.
- 516..... Petfood Enterprise Technologies
- 417..... Preference Technology Inc.
- 915..... Quality Technology International Inc.
- 412..... Reuther Verpackung GmbH & Co. KG
- 503..... Rush Direct/Total Alimentos

Testing

- 700..... Ankorn Technology
- 800..... Kennelwood Inc.
- 517..... Midwest Laboratories
- 919..... Ometric Corp.
- 403..... Romer Labs Inc.
- 913..... Summit Ridge Farms
- 502..... Vicam Group of Waters
- 504..... Waters Corp.



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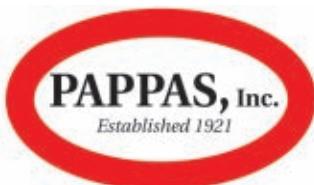
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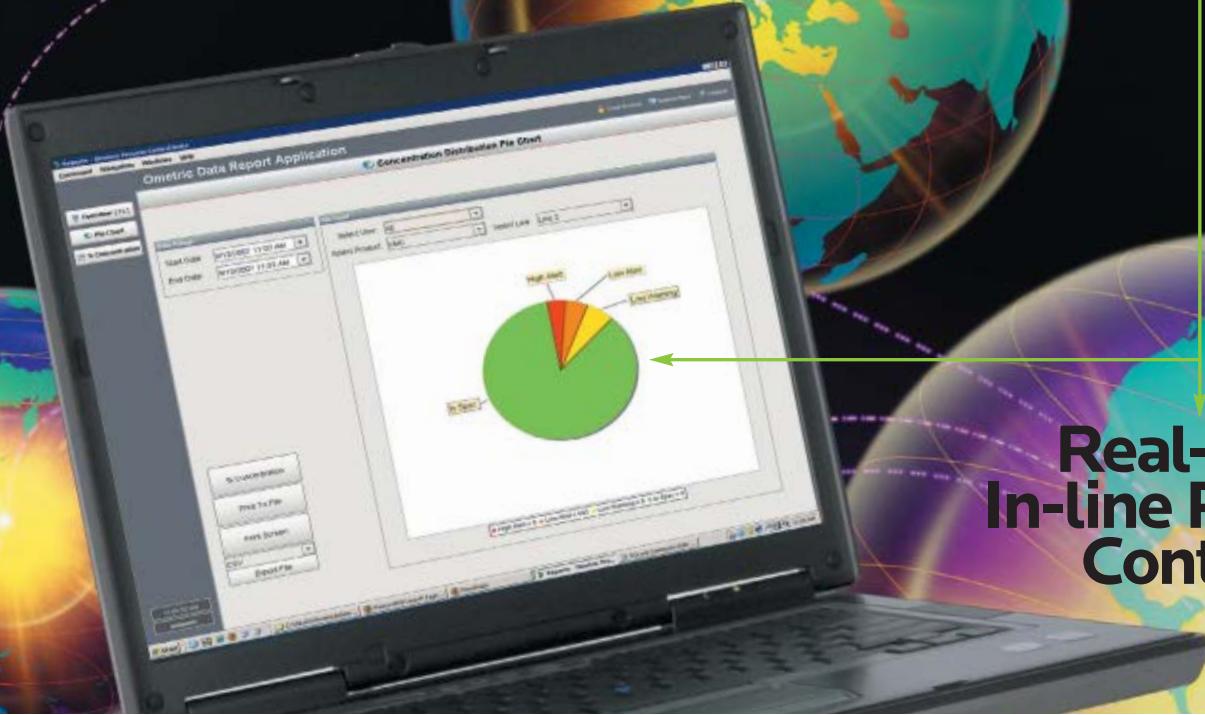
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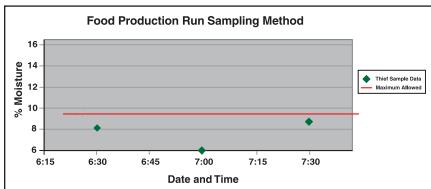


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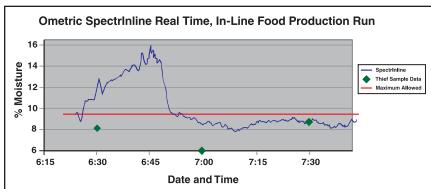


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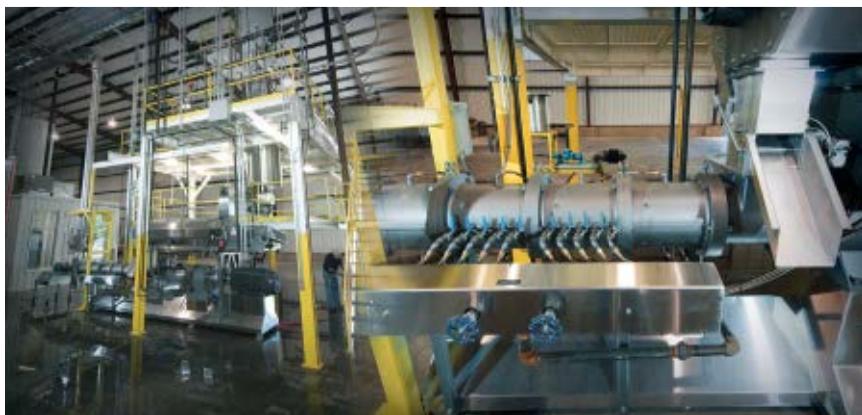
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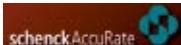
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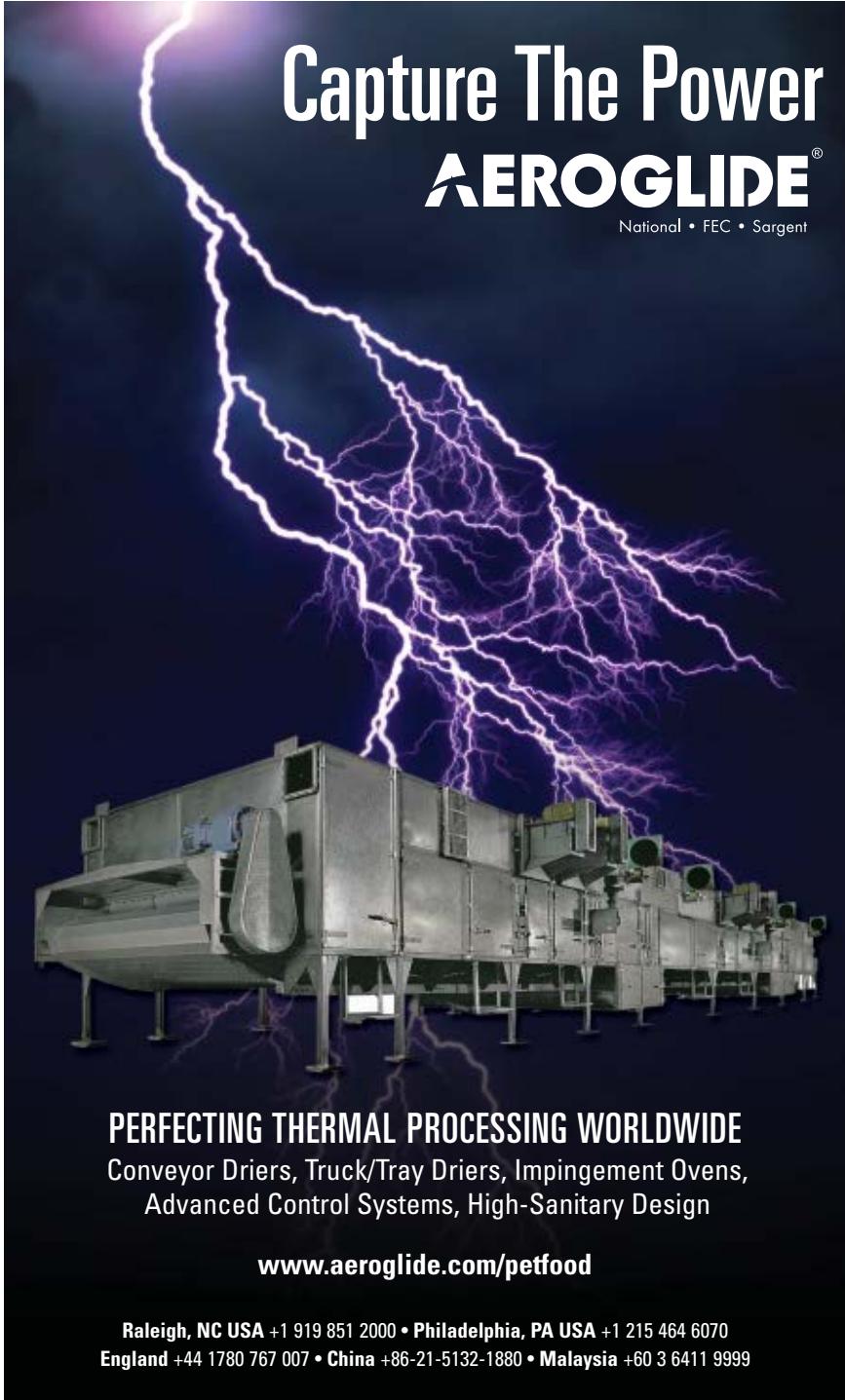
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5 steps

How to investigate and implement a low carbon footprint agenda

BY COLIN MAIR

Very few people now dispute the fact of global warming, though there are lively debates about the rate of warming and how much of it is a direct result of mankind's activities. Many consumers, retailers and governments are expressing the need to do something now about global warming. In particular there is increasing pressure to reduce carbon footprints—the measure of the impact human activities have on the environment in terms of the amount of greenhouse gases produced. This ar-

ticle will cover five steps for reducing carbon footprints:

1. Understanding the issue.
2. Calculating your carbon footprint.
3. Weighing risks and benefits of a low carbon agenda.
4. Focusing on manufacturing.
5. Looking at the big picture.

The carbon footprint concept requires petfood manufacturers to analyze the total “carbon cost” of manufacturing in a way that goes well beyond direct energy costs.

Understanding the issue

Carbon dioxide (CO₂) is recognized as the principal greenhouse gas. Without CO₂ in the atmosphere the earth would be uninhabitable. The presence of just 0.037% of this gas in our atmosphere is responsible for the retention of infra-red heat that otherwise would be radiated out into space, leaving the earth as a ball of ice floating in a huge cold space.

Note that before the industrial revolution the average atmospheric concentration of CO₂ was 0.028%, now it is 0.037%. Most scientists think that this increase in CO₂, as well as other greenhouse gases, is creating a situation where an increasing amount of heat is being retained by the earth, leading to a net warming effect.

The industrial revolution created a sudden demand for energy that led to our use of fossil fuel sources such as coal, oil and natural gas. The carbon that was locked into these materials is being released as CO₂ into the atmosphere. The earth can substantially buffer this release—a great majority of the released CO₂ is absorbed by the oceans and vegetation. However, as the rate of CO₂ release has increased in the last century, the earth's buffering capacity has not been able to keep up. Hence there is a global drive to decrease or offset carbon emissions.

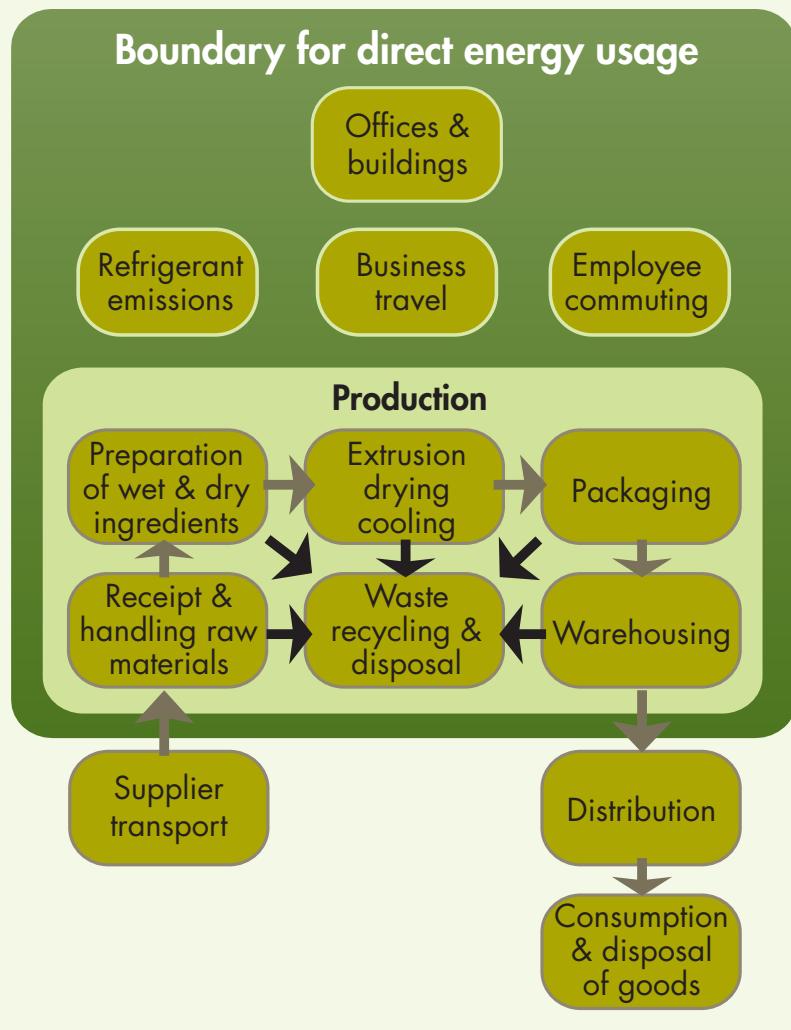
Various governments and organizations have established plans that allow industries to offset their carbon emissions. This is achieved by investing in an accredited plan to buy carbon credits. Theoretically an organization can pay for the carbon it emits, or partially

Online extra!

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

Figure 1: Manageable parts

Break down your company into manageable parts so action plans can be formulated and implemented.



offset the amount of carbon it emits, by investing in an endeavor that reduces carbon emissions. Carbon offset endeavours include:

- Renewable energy;
- Energy efficiency;
- Methane capture; and
- Forestry.

Calculating your carbon footprint

Petfood companies need to calculate their carbon footprints before investing in either company changes or carbon offsets. To do so, use one of the many carbon footprint calculators available on the internet, for example www.carbonfootprint.com/calculator.

aspx. The following information will need to be prepared in advance to carry out the calculation:

- Number of staff and sites;
- Annual fuel consumption in kilowatt hours;
- Amount of waste disposed to landfill and/or incinerated;
- Annual distance or fuel consumption of company owned vehicles, including gasoline, diesel, hybrid, LPG, electric and hydrogen;
- Annual business travel distance or fuel consumption of company vehicles;
- Annual business journeys taken by taxi or train;
- Annual number of flights;

- Annual number of hotel nights; and
- Annual commuting distances by staff—cars, motorcycles, public transport.

After calculating the carbon footprint, the next step is to break down your company's wishes into manageable parts so that action plans can be formulated and implemented (see Figure 1).

Weighing risks and benefits

Petfood companies need to weigh the risks and benefits of adopting a low carbon agenda. Investments in technology can be expensive, but can also reduce some costs. To make good decisions, companies will need an overview of the genuine cost efficiency benefits and the positive impacts on sales, reputation, trust and long term sustainability.

Focusing on manufacturing

The biggest energy user in a petfood company is the manufacturing plant. It is here that the biggest savings can be quickly made, not always with the need for high capital investment. The use of process flow diagrams can assist with analysis and planning. Start by answering the following questions:

- What is the no-load power draw on all the motors?
- Are motors run for long periods with

6 ways to cut carbon emissions

From the blog for the European Business Summit 2008 (<http://greeneconomy.blogactiv.eu>):

1. Facilitate reduced business travel and commuting.
2. Cut energy use in manufacturing via intelligent design.
3. Improve efficiencies in logistics and transportation.
4. Implement energy savings within the power grid.
5. Reduce energy use in buildings.
6. Enable carbon accounting.

Investments in technology can be expensive, but can also reduce some costs.

- no product running? If so, why?
- Which motors would benefit from the use of inverters?
- What is the theoretical use of steam in the conditioner compared to actual?
- Do we pre-heat conditioning water?
- What benefit would pre-hydration of dry feed give us?
- What are air-flows, temperatures and humidities?
- Can we re-use process air?
- Is the dryer optimized?
- Are production rates maximized?
- How much start-up and shut-down waste is there and why?
- How is waste handled and why?
- Are we over-drying product?
- Can we handle ingredients in re-usable vs. disposable containers?
- Are we using extruder cooling water as boiler make-up water?
- Do we know exact energy cost for each product?

The big picture

As an integral part of the implementation strategy, there should be a strategy in place that presents clear and upfront information to customers through labeling, advertising and personal communication. Achievable targets should be established to reduce carbon footprints that give measurable objectives in terms of energy savings and compliance with targets.

Whether or not we agree with any or all of the issues related to global warming, it can only do our companies good to adopt a culture of minimized energy and waste. There is an opportunity to demonstrate to our customers and regulatory authorities that our companies follow practices of sustainability and ethical manufacture and are empathic with public perceptions and changing global issues. ●

Colin Mair is the founder of Cormal Technology, which develops technology to support thermal processing systems, colinmair@btinternet.com, Tel: +44.1526.344495.

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Natural sales rising

US sales of natural and organic petfood are growing at double-digit rates

BY DEBBIE PHILLIPS-DONALDSON

Consumers are turning more and more to natural and organic products. By 2006, 98% of the US buying public reported purchasing a natural product, and 60% reported buying organic, says Information Resources Inc. (IRI). Those consumers who are also pet owners seem to be extending their purchasing habits to their pets' dietary needs.

According to Packaged Facts, sales of natural petfood in the US reached US\$1 billion in 2007. This figure represents 6% of total US petfood sales and a whopping 50% total growth—or a compound annual growth rate (CAGR) of 25%—since 2003. Packaged Facts projects the segment to grow another 16% CAGR by 2012, increasing to more than US\$2 billion (Table 1).

In its report *Natural, Organic and Eco-Friendly Pet Products in the US*, released in October 2007, Packaged Facts says US sales of organic petfood have also increased at booming rates: 55% over 2006 and 48% CAGR since 2003. While still less than .5% of the total US petfood market, 2007 organic sales ended up at US\$67 million, according to data from the Organic Trade

Association. Packaged Facts projects that number to increase another 23% CAGR by 2012 to US\$188 million.

Recalls and more

Besides growing consumer interest, Packaged Facts attributes these sales increases to other factors including:

- ▶ Continuing fallout from the 2007 US petfood recalls;
- ▶ Large petfood companies introducing natural brands in addition to ones from specialty marketers;
- ▶ The number and type of retail outlets carrying natural and organic products is expanding.

“Heightened consumer concerns over petfood safety stemming from the recalls in spring 2007 will keep consumer interest in natural and organic petfood high in the months and years ahead,” predicts David Lummis, senior pet market analyst with Packaged Facts. “Looking across the hundreds of products directly involved in the recall, it cannot be chalked up to coincidence that almost all organic and high-grade natural petfoods were spared.” He says the few natural products that were recalled fell victim to cross contamination rather than actually containing tainted ingredients, though he acknowledges

Table 1: US sales of natural and organic petfood

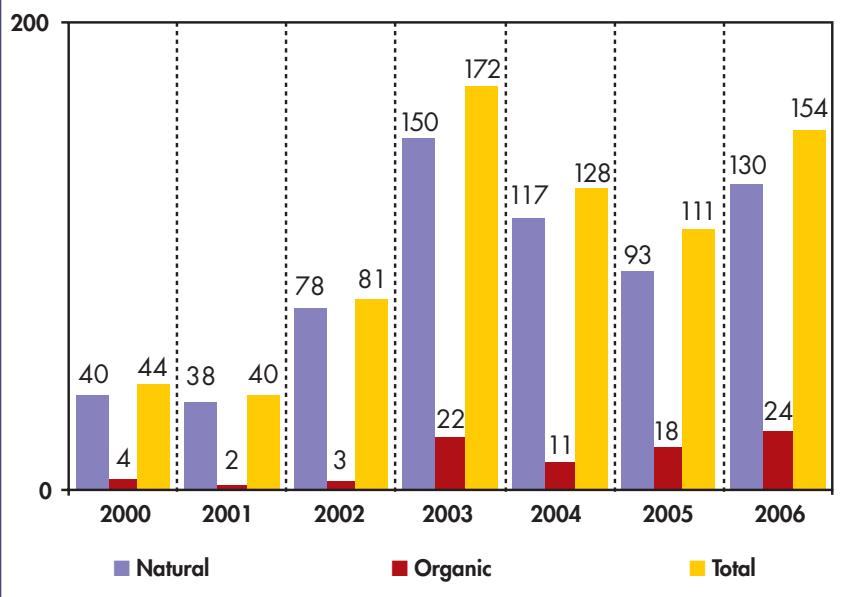
According to Packaged Facts, sales of these categories have grown significantly since 2003 and are projected to keep growing steadily through at least 2012. (CAGR = compound annual growth rate.)

Year	Natural petfood sales		Organic petfood sales	
	US\$ millions	% CAGR	US\$ millions	% CAGR
2003	\$417	15%	\$14	NA
2007	\$1,006	25%	\$67	48%
2012	\$2,097	16%	\$188	23%

Figure 1: Natural and organic petfood product launches

From 2000 to 2006, petfood marketers increased the number of new natural and organic dog and cat food products they introduced in the US. The numbers continued to increase in 2007.

Source: Datamonitor's Productscan new products database. Used with permission.



exceptions such as Nutro products.

Though some petfood manufacturers point to a lack of scientific proof that natural and organic products are indeed healthier or safer, Lummis emphasizes that many natural petfoods and virtually all organic ones contain higher-quality ingredients and are produced in more closely monitored environments. In many cases, this is simply because the companies and production batches are much smaller, he adds.

According to Packaged Facts, other product categories benefiting from the recall fallout include raw/frozen, refrigerated, homemade, 100% US sourced and locally grown—many of which also bear labeling and marketing claims of natural or organic.

Big dogs moving in

Despite the preponderance of smaller petfood companies in the natural/organic category—brands such as Breeder's Choice, Castor & Pollux, Evanger's, Natural Balance, Newman's Own Organics and Old Mother Hubbard are often cited—one of the most significant shifts in the past few years

has been the top five US petfood marketers entering this segment. "As of 2005, only two of the top marketers—Del Monte and Hill's (Colgate-Palmolive)—offered natural brands, and both

were restricted to the pet specialty channel," Lummis says.

Since then, the other top three marketers—Nestlé Purina, Mars and Iams (Procter & Gamble)—have begun offering natural petfoods in both pet specialty and mass market retail outlets. Examples include Nestlé's Natural Blends extension of its Purina ONE line, Mars' Goodlife Recipe line and even Mars' purchase of Nutro in the wake of the 2007 recalls. All signs point to this trend continuing.

Beyond specialty stores

The expansion into natural and organic is not limited to the marketer side; US mass-market retailers are also getting in on the action. Since 2006 Wal-Mart, for example, has been adding related products, including Natural Life certified organic petfoods.

A June 2007 *U.S. News & World Report* article cites Food Marketing Institute data that about 75% of conventional US grocery stores, including major supermarket chains like Kroger, now sell organic food. This seems to spill over to petfood: According to IRI's *Infoscan*, sales of natural petfood in

Natural, organic or neither?

Though US consumers are increasingly purchasing petfoods labeled as natural or organic, they may not know exactly what they're buying. No single official or universally accepted definition for either category exists, so pet owners are often left to figure out product marketing and labeling claims on their own.

The US Association of American Feed Control Officials has a definition for natural petfoods, but many experts believe it leaves too much room for interpretation and does not exclude undesirable ingredients, says Packaged Facts. Plus, the interpretation can vary significantly from state to state, because animal feed regulations are created and enforced primarily at the state level in the US. Not even veterinarians or animal nutritionists agree on a standard definition for natural.

The situation with organic petfoods could become clearer this year if recommendations from a Pet Food Task Force are accepted by the US Department of Agriculture's (USDA) National Organic Standards Board (www.ams.usda.gov/nosb/meetings/orgpetfood.pdf). Currently, many marketers of organic petfoods follow the standards for human foods under the USDA's National Organic Program, though those standards have no specific provisions for petfoods. The intention in forming the task force was to create such specificity.

Without it, the potential for consumer confusion is real. According to Packaged Facts, a survey by a natural and organic direct marketing company called Mambo Sprouts Marketing showed a widely varying interpretation by consumers of the meaning of the USDA organic seal. Perhaps as a result, only 25% of the respondents said they selected products with the seal, while 70% said they instead chose ones simply labeled organic.

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US mass-market outlets (supermarkets, drugstores and mass merchandisers except Wal-Mart) grew 236% in 2006, to US\$29 million, then added US\$57 million more during the first half of 2007.

In addition, Packaged Facts says pet retailers, including the “big box” chains, PetSmart and Petco, continue

to offer more natural and organic petfoods. In the natural and organic retailing area, outlets from small to large, such as Whole Foods, are adding petfoods to their product mix.

Fueling the growth

Seeing all these positives, petfood manufacturers are adopting a strategy that has fueled overall sales growth: ramping up new product development. Datamonitor’s Productscan Online service says that in the US in 2006, companies introduced 154 new petfood products with natural or organic claims, up from 111 in 2005 (Figure 1, p. 57). As of July 31, 2007, another 76 petfood products billed as natural and nine labeled organic had debuted.

Three times as many new natural and organic dog foods versus cat foods have been introduced, according to Packaged Facts. Its 2007 report also mentions that many of the new natural and organic petfoods are designed to help specific health conditions in pets, just as more mainstream petfood products are formulated to do.

Don’t look for any of these trends to slow down anytime soon. Rightly

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**Sales of
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US reached
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or wrongly, many pet owners consider natural and organic petfoods the best way to feed their pets. ●

For more information, see Natural, Organic and Eco-Friendly Pet Products in the US at www.packagedfacts.com. Free registration allows you to access abstracts and search inside reports.

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Keep a lid on it

Packaging testing technology that will protect your products

BY JESSICA TAYLOR BOND

From cans and jars to pouches and bags, different packaging materials require different safety precautions.

There is an increased awareness about the importance of package integrity across many industries, and with the scrutiny heightening on ours, the pressure is on to invest in better quality inspection technologies that can be applied for both off-line testing and in-line automated inspection. Companies that keep using destructive test methods that were developed and approved for use decades ago should re-evaluate their process and investigate technologies that provide valuable data that will improve manufacturing processes, helping reduce overall costs.

Consistency and reliability

According to Tony Stauffer, president of Packaging Technologies and Inspection LLC (PTI), packaging testing has changed over the past decade by becoming simpler, more cost effective and efficient. Most important is the fact that package integrity testing has become more reliable, thanks in part to high precision non-destructive inspection technologies coupled with a user-friendly approach.

There is a growing need for the development of rapid, non-destructive, non-invasive testing technologies. Some of the non-destructive test methods that address this are:

- Vacuum/ pressure decay;
- Airborne ultrasound inspection; and
- Force load testing.

These methods are not only reliable, but yield repeatable, quantifiable statistical test data. Because they are non-destructive, the same samples can be repeatedly tested, a greater number of samples can be tested and even the actual market product itself can be tested.

Other methods—like water bath, dye tests, and peel and burst tests—are

simple to perform and require less expensive equipment, but are destructive to both package and product. These tests also produce test results that are dependent on technique, sample preparation and operator variability, making them more time consuming in the end. Not to mention results from peel and burst tests can be difficult to interpret or correlate to manufacturing process parameters, package quality or shelf-life performance.

Detection and inspection

According to Mettler-Toledo Safeline, processors and packagers in the petfood industry face certain unique



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challenges, including detecting contaminants, detecting damaged or missing products and identifying overfill and underfill. A presentation about x-ray technology and how it addresses these concerns is available for download at www.mt.com/xraytechnology. The presentation, entitled *X-ray Inspection — The Future of Packaging Inspection*, explains the technology and its specific application to our industry, as well as demonstrates that x-ray provides capabilities not available in metal detectors or vision systems.

Checking for seal integrity using Seal-Scan, an airborne ultrasonic inspection technology from PTI, is a fast, efficient, non-destructive method to verify seal quality and pinpoint type, size and location of seal defects, according to the company. The inspection technology is also capable of testing many different types of packaging materials, such as aluminum, foil, paper or a combination of materials.

Integrated packaging solutions

Doboy Inc., a division of Bosch Packaging Technology, offers the TFT Bag Sealer for woven polypropylene bags. The TFT Sealer trims, folds and tapes woven polypropylene bagging material to provide a sturdy, durable seal, yet is easy to open, according to the company.

The double fold closure features a fold depth of 1.25 inches secured with 2 inch wide case sealing. The double fold tape is resistant to both hot and cold temperatures, and the sealing method provides a sift-proof closure to prevent leakage during shipping and storage. With a high speed of 150 feet per minute, the TFT unit is suited for automatic feeding and is easily integrated into most high speed automatic bagging lines, Doboy says.

A packaging line that emphasizes integrated packaging solutions and a “one-stop-shop” approach is also available from Doboy. The packag-



A packaging line that emphasizes integrated packaging solutions and a “one-stop-shop” approach is simple and cost-effective.

© gila. Image from BigStockPhoto.com

Results from peel and burst tests can be difficult to interpret or correlate.

ing line consists of three machines: the Cobra Carton Former, the Linium 301 Horizontal Flow Wrapper and the Presto Top Loader.

Products on the packaging line are wrapped by the Linium 301 Flow Wrapper, which uses flat wound roll stock film and creates a fin seal, crimped-end wrapper. The Cobra Carton Former offers flexibility with hot melt, lock or simplex carton style forming on a small footprint. The Top Loader collates wrapped products being fed from the Linium 301 and places them in formed cartons for the Cobra.

Unique technology

Cross directional laser technology is another way to keep the good things in and the bad things out. LaserTear cross machine directional (CMD) scoring technology from Alcan Packaging can improve pet-food processing with easy-open convenience, superior appearance and tamper evidence, according to the company.

CMD laser-scored film works with zipper applications and creates a unique, "hooded" package that allows for the removal of the entire package header to expose the resealable feature.

By scoring below the zipper, this innovation delivers easier consumer access and eliminates the potential for contents to collect between the zipper and the package. Compatible with vertical form/fill/seal equipment, Alcan Packaging's film featuring LaserTear CMD scoring exhibits excellent machinability, running at

top speeds and meeting operational demands, the company says.

Packaging for bulk shipments comes with its own distinctive problems. EDL Packaging Engineer's Unit Load Systems enclose bulk, variable sized or palletized products for shipment. Translucent low den-

sity polyethylene film provides

both product and handling point visibility during transit, at a lower price than corrugated based packaging. The opaque film also protects from ultraviolet radiation exposure during periods of outdoor storage, according to EDL. ●

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AAFCO moves toward calorie statements

Fans of the band Asleep at the Wheel are likely familiar with its version of the song “Across the Alley from the Alamo” (much older folks will remember it as a Mills Brothers song). In the case of the Association of American Feed Control Officials (AAFCO) January mid-year meeting in San Antonio, Texas, USA, it was right across the street from the Alamo. In the shadow of this symbol of perseverance in times of adversity, AAFCO deliberated on petfood regulatory matters.

Weight management

After considering the report and recommendations of the Calorie Statement Working Group, the AAFCO Pet Food Committee (PFC) accepted, at least in principle, the American College of Veterinary Nutrition proposal to require mandatory calorie content statements on dog and cat food labels. It did not accept any specific regulatory verbiage, however.

Still in question is whether this amendment should apply to all dog and cat food products as originally proposed or whether there should be exceptions (e.g., supplements and treats). A new working group has been assigned to look at this. In fact, PFC combined this group with another one assigned last August to look at the issue of weight management/control claims and develop a comprehensive approach.

Small business policy?

A new issue brought before PFC is whether there should be an AAFCO policy regarding deviation from strict compliance with state labeling or registration requirements for small busi-

The mid-year meeting addressed several regulatory matters affecting petfoods.

— David Dzanis



nesses such as pet bakeries and sellers of homemade treats. The issue is that many of these modest enterprises are not aware of the existing state requirements or find them too burdensome, thus failing to register and subsequently avoiding all regulatory scrutiny.

There was consensus among the attendees of the need for more education and outreach, but less of a meeting of the minds as to whether and what exceptions to the rules may be appropriate. However, there is precedent in the Food and Drug Administration (FDA) and US Department of Agriculture to make some regulatory exceptions for small businesses. A new working group has been formed to explore these matters and make recommendations.

The PFC formed yet another working group to look at the proposed labeling for raw milk products as recommended by the AAFCO Feed Labeling Committee. Also, the deliberations of the expert panel in reviewing and revising the AAFCO *Dog and Cat Food Nutrient Profiles* and feeding trials are continuing, as are plans for AAFCO to

host a Petfood Regulatory Workshop in conjunction with the annual meeting in August. Finally, it was reported that a revised edition of the AAFCO *Petfood and Specialty Petfood Labeling Guide* is now available for purchase from AAFCO’s web site (www.aafco.org).

Adulteration confusion

The Model Bill & Regulations Committee (MBRC) had a number of action items on its agenda but became quickly bogged down during discussion of the recently drafted Model Good Manufacturing Practice Regulations for Feed and Feed Ingredients. This was sent for consideration from the Feed Manufacturing Committee (FMC) after years of deliberation.

The document raised a number of concerns for MBRC, but most notable is the draft regulations’ definition of adulteration. It varies significantly from the definition for the term in the Model Bill and, for that matter, from the Federal Food, Drug and Cosmetic Act. The reported intent of FMC in drafting it this way was to focus on cases of adulteration having direct safety consequences while ignoring those that do not (e.g., viable weed seeds).

I don’t think it’s prudent or workable to have two AAFCO documents with two different definitions for the same

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term; it can only lead to confusion and inconsistent interpretation. MBRC has requested a group comprised of members from both MBRC and FMC be formed to resolve these concerns.

Not ingredient names

The item with the most potential to affect petfoods discussed by the Ingredient Definitions Committee was the proposed feed terms for various forms of carbohydrates, namely fructans, starch and sugars. Of concern was the possibility of misinterpretation of intended use of these terms. They are intended to allow for claims and guarantees relating to the concentrations of these substances in a product.

Current AAFCO policy does not consider claims for carbohydrates to be necessary or meaningful, since it is a vague term that comprises a large category of substances. However, use of these more precise terms on the label could have nutritional merit. The terms are not intended for use as a part of an ingredient name, though. The addition

Most notable is the draft regulations' definition of adulteration.

of a parenthetical "(nutrient)" after each term in its listing in the AAFCO *Official Publication* will distinguish these terms from those allowed to be used as part of an ingredient name—usually distinguished by the parentheticals "(part)" or "(process)" in its listing.

Longest acronym award

Perhaps the biggest topic discussed within several committees was the new federal legislation affecting petfood safety and labeling (see my December 2007 column). AAFCO has formed a multi-committee Coordination Task

Force to deal with matters pertaining to the Food and Drug Administration Amendments Act of 2007—in doing so creating the longest acronym I've seen in recent years (FDA AAAAFCOCTF, pronounced *eff-dee-aaaaay-eff-coke-tif*). This task force will serve as the liaison between AAFCO and FDA. ●

Dr. Dzanis is a writer and independent consultant for the petfood and animal feed industries on 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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Does adding enzymes to petfoods help digestion?

Adding enzymes to the diet to aid digestion has been a source of intrigue for the petfood industry for a number of years. Enzymes (for example, digest and hydrolyzed proteins) are common in petfood production but are seldom found as ingredients in the diet. They have been used successfully in livestock feed applications and hold a great deal of promise to resolve numerous issues for companion animals.

However, there are challenges to including enzymes as part of the diet:

- ▶ They are not robust enough to survive typical petfood production;
- ▶ Supporting research is almost nil;
- ▶ Labeling is clumsy; and
- ▶ Most people, even those who would propose to use enzymes, don't really know what purpose they serve.

So are they worth a second look?

Enzymes hold a great deal of promise but also present challenges.

— Greg Aldrich



What are enzymes, exactly?

Enzymes are proteins that catalyze (accelerate the rate of) biochemical reactions. They are produced by and found in all plant and animal cells. Enzymes are complex molecules with hydrophilic and hydrophobic regions, active sites and functional specificity (they only catalyze certain types of reactions). Some are produced in active form, and others known as zymogens must be modified to become functional. The efficacy of enzymes is not quantified by amount but rather the ability to catalyze a reactant to a product. This is often described as activity and is dependent on conditions such as pH

and temperature.

In dogs and cats, as in other mammals, digestive enzymes are produced by cells in the salivary glands, stomach, small intestine or pancreas. They are a complex of large, three-dimensional proteins

Enzymes are produced by and found in all plant and animal cells.



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composed of hundreds of amino acids that function within the gut to catalyze the breakdown of food.

Digestive enzymes are typically identified by the compound that they act on followed by the suffix “ase” (e.g., protease digests protein) and span the range of food components in the diet (e.g., amylase digests amylose, lipase digests lipid, etc.). Digestive enzymes are not absorbed intact and do not end up in the circulation to perform metabolic functions; rather, they are washed along the gastrointestinal tract with the digesta or hydrolyzed to their constituent amino acids.

The most prominent example of enzyme use for dogs and cats is supplementation to replace digestive enzymes when the pancreas fails to produce adequate levels, a condition known as exocrine pancreatic insufficiency. Supplementing with a cocktail of digestive enzymes can alleviate symptoms associated with this disease, such as constant hunger, soft yellowish stools and undigested food in the feces (Wiberg *et al.*, 1998).

Natural benefit of raw diets?

Proponents of a feeding strategy that has become popular in the past several years, raw foods, tout the natural supply of enzymes as one of its benefits. There is a thread of truth to their theory, since enzymes are found in raw ingredients and are denatured during cooking.

There are a few food enzymes that could be loosely considered digestive in function. Examples in meat are calpains, the multi-catalytic proteinase complex and cathepsins. These enzymes are involved in the conversion of muscle to meat and also help with tenderizing.

Enzymes like the pectinases,



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hemicellulases and cellulases are involved in post-harvest ripening/softening of some fruits and vegetables. In seeds, amylase is activated during germination to liberate sugars that were stored as starch. In oil seeds, lipase enzymes cleave fatty acids from triglycerides.

While the enzymes contained in uncooked foods can participate in food degradation akin to digestion, their impact is likely overwhelmed by the potent acid-chyme of the stomach and cascade of pancreatic enzymes reaching the small intestine of healthy animals. Further, the impact

There are a few food enzymes that could be loosely considered digestive in function.

of these raw ingredient enzymes on overall diet digestibility has not been reported.

Potential for adding enzymes

That doesn't mean the addition of digestive enzymes to companion animal diets doesn't have great potential to:

- ▶ Degrade nuisance and anti-nutritional compounds;
- ▶ Unlock bound nutrients;
- ▶ Improve dietary utilization; and
- ▶ Modulate the rate of nutrient release.

It is especially promising if the added enzymes provide functions uncommon to mammals.

For example, supplementing with cellulase or hemicellulase enzymes could improve digestion of fibrous ingredients, and supplementing with lactase or alpha-glucosidase could hydrolyze flatulence producing di- and tri-saccharide sugars such as lactose, stachyose and raffinose found in milk and legumes.

Supplementing with keratinase or collagenase enzymes could improve the utilization of poorer quality (feathers, wool or cartilage) or heat-damaged proteins. Supplementing with phytase might improve the utili-



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zation of phosphorus and bromelain could resolve hairballs in cats (US Patent #6,080,403).

Practical considerations to adding enzymes

Commercially, enzymes are available from three primary sources:

1. Plant extracts;
2. Animal organs and their extracts;
3. Microbial fermentation.

Most of the digestive enzymes are available for purchase as concentrated powders and are required by regulation to identify their origin and activity level. That's the easy part.

Adding enzymes to a normally processed petfood is difficult due to their loss in activity when heated. Thus, canned foods are definitely out. Extrusion and baking also destroy the enzymes, so surface applica-

It is especially promising if added enzymes provide functions uncommon to mammals.

tion is necessary for these types of products. Unfortunately, achieving satisfactory coating at nano-quantities is near impossible with today's technology.

That leaves tablet and powder supplements as one of the few viable routes for delivering dietary

enzymes. On the positive side, long-term supplementation of enzyme preparations does not negatively impact baseline pancreatic enzyme activities in dogs (Manas *et al.*, 1996); nor does diet affect supplemental enzyme activity (Stock-Damage *et al.*, 1984). However, effective doses, adverse effects or allergic reactions have not been reported.

So, while there are potential benefits for digestive enzyme supplementation in companion animal diets, its practical application remains elusive. ●

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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Healthy convenience foods for pets

If human trends are any indication of what to expect in pet products, mature petfood markets like the US may be in for some significant shifts as new products sync up with busy consumer lifestyles. According to Simmons Market Research Bureau consumer survey data, almost two-thirds of American adults are trying to eat healthier foods these days, although this often dictates compromises (Table 1).

Narrowing the survey responses to dog and cat owners, the results remain remarkably similar, signaling an emerging trend Packaged Facts believes will begin to reshape the US market in 2008.

Fueling the craze

This trend is analyzed in depth in Packaged Facts' February 2007 report, *Pet Food Packaging and Convenience Trends*, which notes, "Several factors are converging to create dynamic opportunities for convenience, travel and portable products." These include:

- ▶ Increasing time constraints among pet owners;
- ▶ A tendency to seek out human-style pet products;
- ▶ The aging pet population (which increases the need for healthier products); and
- ▶ The high level of new product development.

Also fueling the convenience craze is the trend for pet owners to allow their pets to accompany them outside the home, venturing far beyond the parameters of the usual around-the-block walk.

Innovations

What's different is that petfood convenience is no longer just about products that are easy-open, resealable or single-

serve. Take SmartPak, which started out in the equine market with controlled-dosing, peel-off-top, blister-pack technology. The company has expanded into canine supplements and complete diets, providing pre-measured dog food along with medications and supplements, with customized packs being home-delivered to dog owners every 28 days. Prior to

Big convenience news

The biggest news in convenience foods for pets may be what Mars is calling a third feeding method. Developed through the company's Waltham Centre for Pet Nutrition and launched in the US in February, WholeMeals are promoted as the first 100% balanced adult dog meal shaped like a bone, also offering

Table 1: US attitudes—healthy foods and time constraints

Looking at the total US population of 215.1 million adults vs. US pet owners, a 2007 survey asked if respondents agreed with the following statements. Source: Simmons Market Research Bureau, Spring 2007 Study of Media and Markets; compiled by Packaged Facts.

% of US adults	All US adults	Dog or cat owners
Try to eat healthier food these days	64.9%	64.0%
Like trend toward healthier fast food	51.3%	52.2%
Don't have time to prepare/eat healthy meal	33.3%	35.4%
Fast food fits my busy lifestyle	21.9%	23.0%
Often eat store-made, precooked meals	20.7%	21.2%
Rarely sit down to a meal together at home	20.5%	20.9%

making the monthly shipment, the company E-mails the pet owner to check on portion sizes and supplement specifications (among 300). Soon to be available for cats, the service costs about US\$1.48 per day to feed a 20-pound dog.

Going a different route is Jakks Pacific. By licensing popular petfood brand names like Milk-Bone and Meow Mix, Jakks has made a name for itself by extending those brands into non-food pet supplies.

In late 2007, the company made its first direct push into petfood, parlaying its licensing deal with the American Kennel Club into AKC-brand Natural Pet Baked Travel Convenience Meals. Packed in "fresh sealed containers for everyday convenience," the products come with ready-to-use serving bowls.

clinically proven oral care benefits and trendy ingredients like antioxidants and glucosamine. It is being sold exclusively through the pet specialty channel.

Interestingly, in its marketing Mars makes no mention of WholeMeals' convenience appeal, which may be the product's biggest ace in the hole. What could be more convenient than a petfood that eliminates the need for a bowl? ●

Information provided by Packaged Facts, www.packagedfacts.com.

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Research Notes

Key Concepts

► Isoflavones reduce fat accumulation

(Y. Pan, 2006): A diet containing soy isoflavones was very effective in reducing body fat accumulation in spayed/neutered dogs.

► Protein and cats' fecal microbiota

(D.C. Lubbs, 2007): Consumption of high protein diets results in vast changes in the intestinal microbiota of cats.

► Combating cognitive decline

(N.W. Milgram, 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.

Isoflavones reduce fat accumulation

Estrogen plays a key role in regulating fat metabolism and maintaining normal body composition in both female and male animals. Both soy isoflavones and exogenous estrogen have been shown to significantly reduce body fat accumulation in ovariectomized rodents.

In this study, we fed spayed/neutered Labrador Retrievers with either a control diet (Ctl, n=13) or a test diet containing soy isoflavones (Iso, n=14). The dogs were fed 25% more than their maintenance energy requirement. At the end of the 12-month study, the dogs in the Ctl group gained twice as much body weight as the dogs in the Iso group (5.54 vs. 2.68 kg). A soy isoflavones-containing diet was very effective in reducing body fat accumulation in spayed/neutered dogs.

Source: Y. Pan, 2006. Use of soy isoflavones for weight management in spayed/neutered dogs. *FASEB J.* 20:A854-A855.



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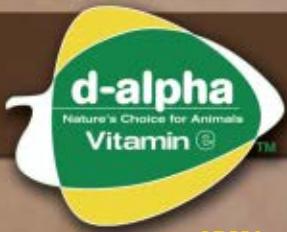


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Protein and cats' fecal microbiota

This study's objective was to identify changes in the fecal microbiota of cats fed high- or moderate-protein diets. Eight healthy female cats (1 year old) were acclimated to a control diet (38% protein) for four weeks. After acclimation, fresh fecal samples were collected and stored at -80°C . Cats were then randomly allotted to a moderate-protein (34% protein; $n=4$) or high-protein (53% protein; $n=4$) diet and fed for eight weeks. Fresh fecal samples were again collected and stored.

Following DNA extraction, denaturing gradient gel electrophoresis and quantitative polymerase chain reaction were performed to identify qualitative and quantitative changes in microbiota, respectively. Dice's similarity index was calculated as a measure of microbial diversity. Compared to baseline, cats fed the high-protein diet had a similarity index of 40.6% compared to 66.7% for those fed the moderate-protein diet. The study concludes that consumption of high protein diets results in vast changes in the intestinal microbiota.

Source: D.C. Lubbs, *et al.*, 2007. Qualitative and quantitative changes in fecal microbiota of cats fed high- or moderate-protein diets. *FASEB J.* 21: 705.2

Combating cognitive decline

Beagle dogs between 7.6 and 8.8 years old administered a twice daily supplement of alpha-lipoic acid (LA) and acetyl-L-carnitine (ALC) over approximately two months made significantly fewer errors in reaching the learning criterion on two landmark discrimination tasks compared to controls administered a methylcellulose placebo. Testing started after a five-day wash-in. The improved performance on the landmark task of dogs supplemented with LA + ALC provides evidence of the effectiveness of this supplement in improving discrimination and allocentric spatial learning. We suggest 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.

Source: N.W. Milgram, *et al.*, 2007. Acetyl-L-carnitine and alpha-lipoic acid supplementation of

aged beagle dogs improves learning in two landmark discrimination tests. *FASEB J.* 21: 3756-3762.



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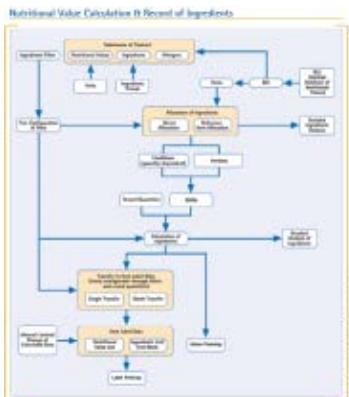
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tions per grain type, but according to the company, the Aquamatic only needs one calibration for all grains and oilseeds. USDA research states that the 150 MHz technology and UMA (unified moisture algorithm) reduces rebound effect and gives the true moisture content rather than the surface moisture content. All results are stored on the integrated flash memory, and the Aquamatic is barcode reader-ready.

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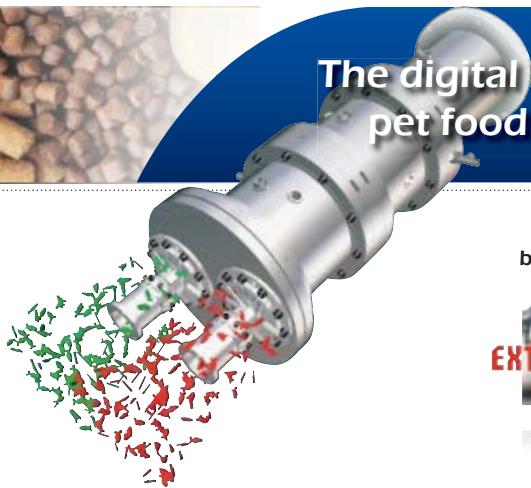
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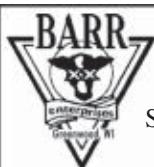
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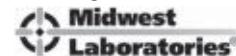
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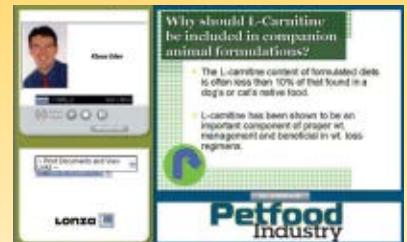


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Recovering from a crisis

It was about this time a year ago—March 16, 2007, to be exact—that the petfood industry, at least in the US, became aware of some sort of product recall. We started hearing that Menu Foods had issued a precautionary recall of cuts-in-gravy style dog and cat foods because of possible contamination.

What started as “precautionary” and “possible” quickly became a real crisis, as more than 60 million cans and pouches of petfood representing about 100 brands—from economy-priced to superpremium—were pulled from shelves over the ensuing weeks. It seemed nearly every day brought a new recall notice, as another manufacturer’s products were implicated, including a few dry foods.

Dozens of pets were reported sickened or killed by petfood contaminated with melamine that had been added to ingredients—wheat flour mislabeled as wheat gluten, plus rice protein—imported from two Chinese suppliers.

One year later ...

A report issued a couple months ago by the American Association of Veterinary Laboratory Diagnosticians showed more than 300 North American pets—236 cats and 112 dogs—had died from eating the contaminated food. (That number may increase, because it included only verifiable cases reported to authorities at that time.)

As we were working on this issue, we received news that a federal grand jury in Kansas City, Missouri, USA, had indicted the two Chinese companies along with ChemNutra, the Las Vegas, Ne-

We have ongoing signs that our industry is still strong and continuing to grow.

— Debbie Phillips-Donaldson



vada, USA, company that had imported the contaminated ingredients into the US. (See Industry News, p. 8.)

And, as reported in recent issues, the US federal government has introduced and, in some cases passed, new laws and regulations affecting petfood safety. At the same time, many manufacturers—those that had products recalled and those fortunate enough to escape direct involvement in the crisis—have been stepping up their safety and testing programs to prevent similar contamination problems in the future. These companies and others have also begun to promote their safety measures to consumers.

The silver lining

Our April issue will include much more in-depth analysis of how the 2007 recalls have affected the industry in the short and long term. Not all the outcomes are negative. A renewed focus on safety can only be a good thing, especially if it might lead to at least closer to adequate funding for US regulatory oversight.

And, we have ongoing signs that our industry is still strong and continuing to grow. Besides hard data, such as sales gains in both the US and global petfood markets, my recent business trips have provided anecdotal evidence:

- ▶ A Feeds & Pet Food Extrusion seminar at Texas A&M University (College Station, Texas, USA) in late January included participants

from around the world seeking to learn more about petfood. They represented not just developed markets like Western Europe and North America but also countries from regions starting to come on strong, such as Egypt, Thailand, Romania, Columbia, Mexico and Trinidad.

- ▶ A visit to Novus International Inc. in St. Charles, Missouri, USA, revealed how animal feed ingredient suppliers are beginning to see the huge potential in petfood and are even considering going directly to consumers with retail products.
- ▶ Global Pet Expo, the largest pet trade show in the US (held in San Diego, California, in February this year), showcased dozens of new petfood-related products: potentially category-changing ones such as WholeMeals from Mars (see Market Report, p. 70), plus lots of premium, natural or organic petfoods and treats (sweet potatoes and exotic animal parts were everywhere, along with functional ingredients).

While we’re all still learning from the lessons of the 2007 recalls, I’d say most of the industry is moving quickly ahead.

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

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