How diet affects behavior
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Focusing on private label
Kurt De Cock of Fides Petfood, p. 18

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**Exclusive Web content**

1. **More on Petfood Forum 2009**: Register online, see the list of exhibitors to date and find updated scheduling and speaker information. [www.petfoodindustry.com/petfoodforum.aspx](http://www.petfoodindustry.com/petfoodforum.aspx)

2. **The diet-behavior link**: Read some of the research behind possible effects of petfood ingredients on pet behavior. [www.petfoodindustry.com/0902PETbehave.aspx](http://www.petfoodindustry.com/0902PETbehave.aspx)

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Tapping into pet power

The popular press is full of stories of people who, through their strong relationship with their pets, have found a reason to go on living despite illnesses,” notes Marty Becker, DVM. This strong relationship, this bond, will be the topic of Dr. Becker’s keynote address at Petfood Forum 2009 on Tuesday, April 21, 2009 at the Hyatt Regency O’Hare in Rosemont, Illinois, USA.

Why is this bond so powerful? Evidence points to the fact that it gives us nonjudgmental, close relationships. Such relationships can help lower our heart rates, decrease blood pressure and enhance our mood. All this makes me happy that there is an organization called Delta Society devoted to fostering this bond.

Fostering the bond
Delta Society (www.deltasociety.org) is a service organization dedicated to promoting the human-animal bond. It seeks to improve human health through therapy and service animals. It also works to increase awareness of the positive effects of animals, reduce the barriers that prevent the involvement of animals in everyday life and expand the therapeutic role of animals in society.

Vision quest
Founded in 1977 and based in Bellevue, Washington USA, Delta Society has these goals:

Advance knowledge. The group works to educate health care and other professionals, as well as the general public, about the healing powers of animals. They promote the ongoing advancement of research designed to demonstrate how animals positively impact human lives.

Empower individuals. By connecting people with disabilities with resources and tools they need to utilize service animals, Delta Society enhances the quality of their lives.

Heal people. The organization encourages people to share the bond they have with their pets with others in need of the unconditional love that only an animal friend can bring.

Delta Society programs
Following are some of the resources available through Delta Society:

➤ The human-animal bond resource center has articles and abstracts for learning more about the wide variety of health benefits people of all ages gain through animals. Subject matter includes the healing power of pets for children, adults, seniors and families.

➤ The service animal resource center is a Web-based program providing information and resources for people with disabilities, as well as their friends and family, who are considering getting a service animal or who are currently partnered with a service animal.

➤ The Pet Partners program trains and screens volunteers and their pets for visiting animal programs in hospitals, nursing homes, rehabilitation centers, schools and other facilities.

For more information contact Delta Society, 875 124th Avenue NE, Suite 101, Bellevue, WA 98005, USA. Tel: +1.425.679.5500; Fax: +1.425.679.5539; joanmt@deltasociety.org

Dr. Phillips is the editor of Petfood Industry magazine. He can be reached at Tel: +1.815.966.5544, E-mail: tphillips@wattnet.net.

The group works to educate health care and other professionals.

— Tim Phillips

Teamwork
The Delta Society educates Pet Partners teams that are registered (not certified). This education covers topics such as infection control procedures, how to effectively engage with different populations and how to recognize stress signs in pets and the people they visit.

The human with its animal partner is also screened using a 22-part evaluation process. Once the team passes these requirements, plus a health-screening from their veterinarian, the team can then register with Delta Society. The organization requires new evaluations, animal health screenings and renewal registrations every two years.
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Industry News

Quick hits

➤ Thai Union Frozen Products reports that canned petfood accounted for 9% of its record sales in 2008.

➤ Jean Grunewald is the new CEO of Nestlé Purina Pet Care Germany.

➤ Nupro All Natural Pet Supplements is celebrating its 20th year in business this month.

➤ Bentoli AgriNutrition Inc. announced the appointment of Larry G. Henry as its new territory sales manager for the Midwest, USA.

➤ Del Monte Foods has named Draftfcb its integrated marketing agency of record for its entire portfolio of pet products.

➤ Key Technology has launched its new online training program, www.key.net.

➤ Mocon Inc. is partnering with Clemson University and Sealed Air to support the new Cryovac Flavour Mark Retort Laboratory.

Last chance for early bird registration for Petfood Forum & Workshop 2009

Petfood Forum 2009 will take place April 20-22, 2009, at the Hyatt Regency O’Hare Hotel near Chicago, Illinois, USA. The premiere event for the petfood industry offers even more learning and networking opportunities than before. Early bird registration for this exciting event is still available. A new Petfood Forum blog is also updated regularly on PetfoodIndustry.com to keep you abreast of new speakers, presentations and other exciting Forum news. For example, check out the latest post from keynote speaker Dr. Marty Becker, DVM.

Petfood Workshop: Essential Training will take place April 22-23, 2009. This seminar will provide a thorough overview of the petfood market, its structure and key players, plus the important growth driver of new products and how they impact the industry.

Turn to p. 22 of this issue for a list of topics and speakers for Petfood Forum and Petfood Workshop. For more information, contact Jackie Thrash, Tel: +1.404.760.2823, Fax: +1.404.240.0998, E-mail: petfoodforum@meetingexpectations.com or contact Ginny Stadel, Tel: +1.815.966.5591, Fax: +1.815.968.0941, E-mail: gstadel@wattnet.net.

Increased petfood prices strain sales

Surging petfood expenses are pinching the profit margins of pet store owners, who say the cost increases and the declining economy are driving customers to cheaper supermarket or price club brands, according to an article from The Record, a newspaper in Bergen County, New Jersey, USA.

Petfood makers point to rising costs of energy, ingredients, packaging and transportation, though many of those prices have declined in recent months. Corn, a main ingredient in many dog foods, climbed to a record US$7.99 a bushel on June 27, 2008, abetted by the push to use corn-based ethanol in gasoline. Oil prices surged to more than US$147 a barrel in July, driving up transportation costs.

Industry experts and analysts have cited the pet products industry as one of the few to be insulated from economic troubles, but small pet store owners believe the economic slump has finally caught up with pet owners and they are shifting to the cheaper supermarket and price club brands.

“I can’t make money if people stop coming in because things are too expensive,” says Janet Kaine, owner of Oak Ridge Pet Food and Supply in Newfoundland, New Jersey, USA. “We’re trying to not go any higher than we absolutely must.”

At discount retailer Target Corp., dog and cat food sales have been up in the past 12 months and “are performing above our projections and exceeding expectations,” said spokesman Joshua Thomas in the article.
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Manufacturers launch Global Data Synchronization in Russia. Global manufacturers Kraft Foods, Nestlé Purina and Procter & Gamble, along with German-based retailer Metro Group, have extended the use of the Global Data Synchronization Network to synchronize data in Russia.

The companies intend to synchronize their product catalogs in multiple countries with Metro Group representation and expect benefits such as reduced paperwork and strengthened service levels.

In addition to Russia, Metro Group is currently synchronizing GDSN data in Germany, Poland and the UK and is working toward rolling out its efforts to other countries, such as Denmark and Hungary.

China pet show draws record crowds. The 2008 12th China International Pet Show drew 25,000 trade visitors and 476 exhibitors to the Beijing Exhibition Centre from November 6-9, 2008, according to show organizers.

Exhibitors came from China and 18 other countries, and the number of international trade visitors rose by 30%. Nürnberg Global Fairs and China Great Wall International Exhibitions organized the show, which featured many petfood products.


Free food for Obama dog

Anthony Holloway, owner of www.K9Cuisine.com, is willing to deliver free dog food to the White House doorstep for the new First Dog.

“I want to reach out to my former Illinoisans’ future pooch,” says Holloway. “First we have to figure out how free shipping and delivery is handled at the secure White House.”

President Barack Obama reportedly is looking for a hypoallergenic dog for his daughters. The Obama family has narrowed its choices for the new First Dog and is looking in Washington-area shelters. Daughters Sasha and Malia soon will own a Labradoodle or a Portuguese water dog.

Holloway’s online pet store is based in Paris, Illinois, USA, and offers petfood without gluten, soy, corn or wheat, according to the website.

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INDUSTRY CALENDAR

February
19th Annual Feeds & Pet Food Extrusion Short Course, February 1-6, 2009, Texas A&M University, College Station, Texas, USA. Contact: Dr. Mian Ruiz, Tel: +1.979.845.2774, Fax: +1.979.458.0019, mruiz@tamu.edu, www.tamu.edu/extrusion.

Global Pet Expo, February 12-14, 2009, Orange County Convention Center, Orlando, Florida, USA. Contact: APPMA, Tel: +1.203.532.0000, Fax: +1.203.532.0551, globalpetexpo.org/contact.asp, globalpetexpo.org.

March

April


A complete listing of 2009 events is available at www.PetfoodIndustry.com
Study shows recession is affecting pet care

According to a recent US study, *Economy and Pet Care*, from Brakke Consulting, the pet care industry is not completely recession proof.

The study, which surveyed 1,500 dog and cat owners and 225 companion animal veterinarians, found many pet owners are cutting back on purchases of pet products and services, impacting retail and veterinarian sectors.

According to the research, 46% of pet owners indicated their financial situation was worse in 2008 than in 2007. More than one fourth—27%—said the employment status of the main household wage earner declined during the past year.

The impact was worse in the Midwest region of the US than in other parts of the country and among families with annual household incomes under US$50,000. Services such as boarding, grooming and veterinary care took the biggest hits, according to the research. Average transaction charge barely will have grown in 2008, according to study results.

For copies of the complete report, contact John Volk at jvolk@brakkeconsulting.com or by calling +1.773.327.4941.

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New on the Shelves

Grain-free cat meals
Wellness brand now offers grain-free Healthy Indulgence Naturally Delicious Every-day Entrees for cats. The meal pouches consist of sliced morsels in sauce, in Chicken & Chicken Liver, Tuna, Salmon & Tuna and Turkey & Chicken flavors. According to the company, each entree is rich in antioxidant phytonutrients such as cranberries and blueberries to promote urinary tract health. The product contains no grains, wheat or wheat gluten, meat by-products, corn, soy or artificial preservatives, colors or flavors, Wellness says. www.wellnesspetfood.com

Biscotti for dogs
Dr. Harvey’s Healthy Formulations Inc. has created Barkotti—a crunchy biscotti for dogs. The vegetarian recipe offers vitamins and minerals from ingredients such as bee pollen, fruits and vegetables, according to the company. The barkotti is available in two sizes—for small dogs and medium to large dogs. www.drharveys.com

Fish treats for dogs
Pet ‘n Shape Natural Catch from Pet Ventures are fish treats for dogs. Made in Iceland, the treats provide omega-3 and 6 fatty acids, according to the company. Four varieties are available: salmon, shrimp, lobster and white fish. Pet Ventures says the treats can help maintain healthy joints, sustain a smooth coat and promote strong muscles. www.petventures.com

Dental chew bone
Terrabone—an edible dental chew bone—is available from Complete Natural Nutrition. The bone is designed to clean teeth and freshen breath with 100% natural and 50% organic ingredients, sourced and made in the US, according to the company. Terrabone does not contain wheat, gluten, soy, corn or animal by-products. The product is available in two sizes for both small and large dogs. www.completenaturalnutrition.com

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Being a successful player in today’s fiercely competitive private label petfood arena requires exceptional flexibility and solid cost controls. This basic thinking guided the setup of Fides Petfood—both its business model and the 2006 construction of its plant in Ostend, Belgium.

Part of Group Depré, Fides Petfood operates an ultra-modern plant that stems from the decision to establish an autonomous, dedicated production site, entirely focused on private label dog and cat foods. The goal was to improve its products and better meet specific market requirements.

The Fides Petfood plant in Ostend, Belgium, was built in 2006.

Focusing on private label

Fides Petfood’s single-minded attention to maximum efficiency has paid off

BY STEFANIA PES

Business basics

Headquarters: Group Depré, Beernem, Belgium; Fides Petfood, Ostend, Belgium

Facilities: Group Depré, Agro Division has two facilities (Beernem and Antwerpen); Group Depré, Petfood Division has two facilities (Beduco in Schoten, Fides Petfood in Ostend)

Officers: Fides Petfood—Kurt De Cock, plant director; Dirk Buysse, general director

Sales: Group Depré: EUR 150 million (US$200 million)

Employees: Group Depré—170 in four facilities; Fides Petfood—5

Brands: Euro Premium, Fides Breeder Line and Mr. Dog

Website: www.groupdepre.be; www.fidespetfood.be
Counterflow drying advantages

Fides Petfood, seeking optimum energy efficiency, selected a Geelen Counterflow dryer. Dryers are the largest energy consumers in any petfood facility, notes Kurt De Cock, plant director. According to Geelen, its dryer achieves an energy efficiency that is 20-50% better than available alternatives.

The reason is the use of counterflow principles, which enable a more efficient exchange of energy and water between product and air. The dryer’s internal recirculation leads to a lower exhaust air volume, a lower exhaust air temperature (typically only 50-60° C) and a very high relative humidity of exhaust air, Geelen says.

The dryer is made of double walled stainless steel, with material between the inner and outer walls providing complete insulation from the ambient environment. Thanks to only one controlled air inlet and exhaust, continuous, real-time measurement—displayed on the control screen—of all relevant variables (product flow rate, actual moisture, temperature and air volume of each drying stage) allows the operator to monitor the mass and energy balance of the dryer continuously online. Measuring these flows is a critical step toward minimizing energy waste.

An optional microwave moisture sensor allows the dryer to react automatically to any changes in moisture of the product or changes in the environment. The use of gravity flow means the dryer has an absolute minimum of moving parts, which are mechanically “overdesigned” to make it nearly maintenance free while meeting the highest industry standards for sanitation, Geelen says.

A diverse feed mix

Group Depré, one of the top five feed companies in Belgium, is a diverse mix of animal nutrition endeavors. It has produced compound feeds for more than 60 years. It entered the petfood industry in the 1990s, with the production of foods for birds, small animals and cats and dogs. Fides Petfood represents a big step toward expanding the group’s branded lines, which are marketed through its sister company Beduco.

“We see Fides as a private label company in every respect,” says Kurt De Cock, Fides’ plant director. “We do produce our own brands like Fides Breeder Line and Euro Premium, and they are distributed by our sister company Beduco, but Beduco operates totally separate from us.

“All we do is petfood manufacturing,” De Cock continues. “From our point of view, Beduco is a customer just like any other. However, when it comes to attaining maximum efficiency,” explains De Cock, “Fides monitors Beduco stocks, thus allowing optimum production planning for just-in-time delivery.”

Just-in-time approach

One of Fides’ goals is to use the just-in-time approach with as many customers as possible. This produces benefits for both sides, but it requires a lot of work building partnerships based on mutual commitment, according to De Cock.

From the beginning, Fides chose to have a very limited warehouse capacity and produce based on customer demand. With a one week lead time, Fides fills 95% of its orders.

“On one hand, this eliminates some potential clients that need more products in stock,” states De Cock, “but it enables us to produce as efficiently as possible. Most important for a private label company are volume and reducing costs. If you can’t control your costs, you lose your profits. Cost control and the ability to produce on demand are what make us different from our competitors,” he says.

Tailor-made kibble

A key issue for Fides is guaranteeing the consistency of all tailor-made kibbles, which range from superpremium to mass market products. Various products are produced for different clients in both wholesale and retail (supermarkets, horticultural centers and specialized pet stores).

Fides responded to this challenge with a lean organizational model. This was not a reengineering of a pre-existing, less efficient process, but the application of a systematic improvement approach, aimed at obtaining greater efficiency and reducing wasted effort, time, space and cost. In other words, Fides worked toward reducing all activities that did not add value.

“Dryers are the largest energy consumers in any petfood facility.”

The new factory was designed to allow further expansion (e.g., to double the extrusion line) with minimum additional investment. It is fully automated and needs only eight people to run—mostly working on the packing line.

Fides Petfood can therefore count on a modern and flexible production line that complies with the highest quality standards and makes it possible to deal with shifting customer demands. The
company has the flexibility it needs to deal efficiently with business variability.

Energy efficiency tactics

Establishing the new Fides plant in Ostend, Belgium, was a strategic decision by Group Dépré. The company has been very careful in selecting every supplier and setting up a modern production unit with a fully automated, PLC-controlled extruder line and state-of-the-art equipment.

Fides chose Ottevanger Milling Engineers, one of the leading European companies specializing in equipment for processing grain and the production of compound feed and petfood. Ottevanger designed the Fides plant and managed construction and procurement of equipment: a macro dosing system, a micro dosing system, a grinding and mixing section, an extrusion line and a drying, coating and cooling system. The plant can produce 6 to 9 tons of petfood per hour.

Future improvements

Future improvements include the possibility of further automation of the packing line, as De Cock explains: “So far the majority of our bags are 15 kg, but the smaller packs are becoming more and more popular. “Now we can do it all on the same line, but we have to divert the 4 kg or smaller bags to another line where we can pack separately,” De Cock continues. “So this is something we are definitely looking at right now, but we must be sure we can do it with maximum efficiency.”

Stefania Pes is a writer for Mediatic (www.mediatic.it), based in Italy.

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Petfood Forum 2009 promises information you need to succeed and plenty of networking with your peers.

PetfoodForum preview

Find out how to keep growing your business at this year’s event—and the new Petfood Workshop

Even in this tough economy, the petfood industry is continuing to grow, thanks to key trends such as humanization, convenience and health. This year’s program for Petfood Forum, scheduled for April 20-22 at the Hyatt Regency O’Hare near Chicago, Illinois, USA, is designed to deliver information on how to capitalize on those trends, starting with the keynote speaker—a first for Forum.

Marty Becker, DVM, is a popular author and regular contributor to Good Morning America. His keynote address will include insights on how to leverage the human-pet bond to your advantage, plus tips on selling premium petfoods he’s learned from 30 years as a veterinarian and animal hospital owner.

This year’s event also includes other exciting speakers such as the Petco executive in charge of dog food and experts on new product development, nutrition, plant efficiency and more. Plus, for the first time at Forum, you’ll see posters showcasing the latest petfood research; and you can enjoy many opportunities to network with peers.

Immediately following Petfood Forum on April 22-23, also at the Hyatt Regency O’Hare, the brand-new Petfood Workshop: Essential Training will provide a thorough overview of the petfood industry to newcomers and professionals who need a refresher or better understanding of functions other than their own. General sessions will cover the market’s size and key players, the new products driving market growth and the industry’s structure.

Then, attendees will rotate through four separate rooms to gain a deeper understanding of key areas:
➤ Nutrition and ingredients;
➤ Regulatory;
➤ Packaging; and
➤ Production (extrusion).

On pages 26 and 29 you’ll find scheduling, speaker and topic information as of press time. For updates, bookmark www.petfoodindustry.com/petfoodforum.aspx, and watch for the March issue. For specific questions, contact Ginny Stadel, gstadel@wattnet.net or +1.815.966.5591; for help with registration, contact Jackie Thrash, +1.404.760.2823 or petfoodforum@meetingexpectations.com.

2009 exhibitors

Petfood Forum blog
Check out the new blog on the Petfoodindustry.com homepage for updates to the program and posts from speakers, including keynote Dr. Marty Becker.

Marty Becker, DVM, is the keynote speaker for Petfood Forum 2009.

Register online
Registering for Petfood Forum 2009 and Petfood Workshop is quick and easy at www.petfoodindustry.com/petfoodforum.aspx. Register by February 20 and save up to 15%.
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To learn more, contact a sales director listed below or visit www.afbinternational.com.
Monday, April 20
1:00-7:30 pm Registration
5:30-7:30 pm Reception

Tuesday, April 21
(Sessions in the same time slot are concurrent.)
7:00-8:00 am Breakfast
8:00-9:30 am Keynote: Marty Becker, DVM, shares his insights on the human-animal bond and how to educate pet owners about nutrition.
9:00 am-7:00 pm Exhibits open
9:30-10:10 am Break
10:15-11:00 am General session: Rick Rockhill, VP of dog food consumables for Petco, explains what retailers want from petfood manufacturers.
11:05-11:50 am General session: Sustainability—why is it important for the petfood industry? How can you make your business more sustainable? (To be confirmed.)
11:50 am-1:00 pm Lunch
1:00-2:00 pm Poster presentations/networking sessions
2:05-2:45 pm Guerrilla marketing: Vicki Lynne Morgan of Animal Brands discusses how tomorrow’s success lies in a targeted, 360-degree marketing approach using technology and a “guerrilla” state of mind.
Ingredient sourcing and cytotoxicity testing: Jennifer Radosevich explains Kemin Nutrisurance’s new early alert program for certain ingredients to better address safety concerns.
2:50-3:30 pm Petfood market update: the value equation: David Luminis of Packaged Facts shows how communicating product benefits and tapping into the potent human/animal bond is more important than ever in a tough economy.
Product testing with household panels: John Presutti of Market-i Research demonstrates that with a new product launch, understanding the impact of product formulation is best assessed via a household panel.
4:20-5:00 pm The changing world and new product development: John Adams of Adams Developments discusses long-term, fundamental, global movements and how they will impact the market.
Energy source impact on production costs, product and the environment: Galen Rokey of Wenger and Rick Scholtens of Interstates review how energy inputs common to extrusion and plant operations can be used to reduce cost and environmental impact.
5:00-7:00 pm Reception

Wednesday, April 22
(Sessions in the same time slot are concurrent.)
7:00-8:00 am Breakfast
7:30-10:30 am Exhibits open
8:00-8:40 am Probiotics in veterinary nutrition: Dr. Anton Beynen, Bacterfield SA, explains the many benefits of using probiotics in petfoods.
New EU petfood marketing rules: Dr. Wolfgang Trunk of the European Commission gives an overview of new rules to enforce safe feed for pets and provide appropriate customer information.
8:45-9:25 am The best ways to use chelated materials: Tom Best of Trouw and Ron Rompala of Blue Seal discuss how differences in forms of chelated trace minerals affect proper use of these ingredients.
Functional properties of plasma proteins: Dr. Javier Polo of APC Europe reviews the benefits of spray-dried animal plasma for wet petfood production and as a palatability enhancer, particularly for cats.

9:30-10:00 am Break
10:05-10:45 am Health and wellness in the global petfood market: Lee Linthicum of Euromonitor explains how the proliferation of functional ingredients and products addressing food intolerances creates opportunities for petfood companies.
Managing your unsaleables: Debbie Grosh of DLG Strategies addresses handling damaged product. Managing the problem can improve your bottom line and the environment.
10:50-11:30 am How petfood affects behavior: Dr. Guido Bosch of Wageningen University, Netherlands, shares highlights of his research on how certain types of petfood ingredients may influence pet behavior.
Petfood’s biggest hurdle: ingredient approval: Jarrod Kersey of the American Feed Industry Association explains why identifying a regulatory approval mechanism for novel ingredients would benefit petfood manufacturers and consumers.
11:35 am-12:15 pm Packaging and marketing to today’s pet parents: Jim Morris of Morris Packaging/Heartland Ingredients offers insights on how today’s highly involved pet owners respond to marketing and packaging of petfoods.
Regulatory issues for unapproved ingredients: Bill Bookout of the National Animal Supplement Council gives another perspective on novel ingredients, following up on Jarrod Kersey’s at 10:50 am—including approaches used in Canada and by other industries.
12:15-2:00 pm Lunch
Register by February 20 & Save 15%
Sign up online today at www.petfoodindustry.com/petfoodforum.aspx

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April 20-22

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- Information on the latest market trends
- Guerilla marketing strategies
- Cytotoxicity testing
- The changing world and its impact on new product development
- Petfood’s biggest hurdle: ingredient approval
- Packaging and marketing to the new age of pet parents
- Creating household panels
- How energy sources impact production costs, product characteristics and the environment.

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Attendee Registration Form
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<th>Petfood Forum (full event)</th>
<th>One-day rate April 21, 2009</th>
<th>Exhibit-hall only pass</th>
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Petfood Forum

Wednesday, April 22
7:00 am-2:00 pm  Registration

2:00-3:00 pm  General session:  Lee Linthicum of Euromonitor discusses market data, forecasts, company profiles and key trends.

3:00-3:20 pm  Break

3:20-4:35 pm  First round of breakout sessions (each an interactive workshop on one key area of petfood):

1. Nutrition and ingredients: Greg Aldrich, PhD, of Pet Food & Ingredient Technology gives an overview on companion animal nutrition and the types of ingredients used in petfood.

2. Regulatory: David Dzanis, DVM, PhD, DACVN, explains what you need to know about US petfood and labeling regulations to achieve nationwide compliance. Includes a fun quiz.

3. Processing/production: Galen Rokey of Wenger uses a virtual petfood extrusion demonstration to showcase hardware, software and other process control tools in real time.

4. Packaging: A packaging expert reviews the types of materials, equipment, processes and considerations that go into the packaging of petfoods.

4:40-5:55 pm  Second round of breakout sessions (groups rotate among the four rooms)

Thursday, April 23
7:00-8:00 am  Breakfast

8:00-8:40 am  General session:  Krista Faron of Mintel shows new products and explains how they drive growth in the petfood industry.

8:45-9:20 am  General session:  Tom Willard, industry consultant, gives an overview of the structure and flow of the petfood industry.

9:30-10:45 am  Third round of breakout sessions (groups rotate among the four rooms)

10:45-11:05 am  Break

11:10 am-12:25 pm  Fourth round of breakout sessions (groups rotate among the four rooms)

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In the wake of the massive 2007 petfood recalls, the US government passed what was intended to be sweeping new regulations. The Food and Drug Administration (FDA) Amendments Act of 2007, or FDAAA, requires the FDA to take a much more active role in the oversight and safety of petfood; yet 18 months later, the rules for implementation are still being debated.

Several groups—including the Pet Food Institute (PFI), National Grain and Feed Association and the Association of American Feed Control Officials (AAFCO)—recently responded to FDA’s call for comments on the new rules. Several key themes emerged:

➤ Despite the 2007 recalls, petfood is among the most regulated and safest products sold in the US.
➤ Any new regulations should align with the already established and in-use AAFCO models; and
➤ All FDA regulations and inspections need to be based on sound science and risk principles.

Two experts share their specific opinions here. For an update on upcoming new European regulations, watch the March issue of Petfood Industry.

Science and feasibility are key

DAVID A. DZANIS, DVM, PhD, DACVN, DZANIS CONSULTING & COLLABORATIONS

Notwithstanding the 2007 recall of products contaminated with melamine and related compounds, petfoods have had a good safety record in the US. Yet, because of their high prevalence and frequency of use in pet-owning households, petfoods receive more than their fair share of blame for adverse health events. In dog and cat poisoning cases where the causes were confirmed, only 1.7% could be attributed to food—far below the number for many other household items, such as drugs, insecticides, plants, rodenticides and cleaning products (Miller et al., 2000).

Despite these statistics, the Internet is replete with sites that disparage the safety of commercial petfood products, often implicating poor regulatory oversight as a major factor. Some of the concerns expressed do have legitimate merit, but many others are without sound scientific or regulatory rationale. Petfood manufacturers who accede to ill-founded concerns for the sake of public image or market share may provide a façade of improved safety, but these acts do little to improve safety per se.

For example, there doesn’t appear to be evidence that the manufacturer-initiated removal of ethoxyquin from petfoods in response to advocates’ demands in the 1990s ever accomplished anything beneficial. Routine testing of outgoing product for melamine content may be prudent in some cases, but when done at the expense of appropriate attention to many other potential safety problems, it serves to offer dubious promises to the consumer more than true improved safety.

Dr. Dzanis is a consultant on veterinary nutrition, labeling and regulation and a regular columnist for Petfood Industry (www.petfoodindustry.com/0902PETInsights.aspx).
Commercial petfoods truly are one of the amazing products of the 20th century. They provide carefully balanced nutrition at an affordable price and have an exceptional safety record that compares favorably to human food. Petfood products are the most highly regulated products on US grocery store shelves, with the exception of infant formula. Federal and state regulations and guidelines apply to virtually every aspect of petfood, including:

- Ingredients used;
- Process by which products are made;
- Nutritional content; and
- Information that appears on labels.

The result is that consumers can choose from a wide variety of products that provide all of the nutrition required by their pet cats and dogs.

The last two years have illustrated a challenge brought about by the new global economy that has resulted in greater US government activity aimed at ensuring the safety of products—including processed food and ingredients—that cross international borders. As a result, the US FDA was mandated to develop national regulations for petfood pertaining to ingredients, manufacturing and labeling. These three areas are already covered by the AAFCO Model Bill and Model Regulations, which have been worked on for over 40 years and adopted widely by the states. It is because they are in place that PFI, in its official comments on the proposed regulations, urged FDA to adopt regulations consistent with the AAFCO models.

As the FDA petfood regulations are expected to be released for public comment in the coming months, it is important to maintain perspective on the long record of production and use of commercial petfood products. Continuous research, innovation and expansion of nutritional knowledge for companion animals have resulted in a highly competitive and dynamic domestic petfood sector. The US petfood industry has set the global standard for quality, nutrition and yes, safety, for many years, as it will continue to do for many years to come.

Stay with AAFCO
BY DUANE EKEDAH, PFI

This is not to say there isn’t opportunity for improvement in petfood safety regulation. FDAAA places much of the burden on FDA to develop and implement improved methods to detect a petfood-borne outbreak in its early stages and communicate on such matters with industry and the public more effectively. While that aspect of the new law only helps after a safety problem erupts, the act also requires FDA to promulgate regulations to improve ingredient, processing and labeling standards as a means of proactively addressing petfood safety.

As of this writing, proposed rules to implement the act are forthcoming, so it is unknown what FDA plans to offer in this area. Whatever is proposed, it is imperative it be scientifically valid, feasible for industry to accommodate and enforceable by regulatory bodies. While additional costs to both government and industry should be expected, any substantial increase in expenditures must be weighed against actual benefit to safety. New regulations pertinent to process control (e.g., Good Manufacturing Practices) would appear to be the most useful complement to the product control regulations already in place, guiding industry to establish procedures that can be both efficient and cost-effective in elevating the standards for petfood safety.

PFI urged FDA to adopt regulations consistent with the AAFCO models.

Read and discuss online
For comments on FDAAA, see www.regulations.gov
(enter Docket #FDA-2007-N-0442).
Behavior is regulated by neurotransmitters and hormones, and changes in the availability of their precursors may influence behavior. But unfortunately, the effects of nutrients on behavior are largely unknown. Following are examples of dietary nutrients most likely to have an effect on canine behavior:

- Phytoestrogens, found primarily in soy, may decrease anxiety but increase aggression;
- Antioxidants may lessen age-dependent cognitive decline in dogs;
- Tryptophan may decrease canine aggression and fearfulness.

Preventing euthanasia

At present, few studies have been conducted to evaluate the role of nutrition in canine problem behavior. But studies that explore this relationship may help improve the welfare of dogs and their owners.

Polyunsaturated fatty acids (PUFA), especially docosahexaenoic acid (DHA), have an important role as structural constituents in brain development. Dietary supply of omega-3 and omega-6 PUFAs could modify aspects of the dopaminergic and serotonergic systems and, consequently, cognitive performance and behavior.
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Finally, persistent feeding motivation between meals can increase stereotyped behavior and aggression and decrease resting time. This feeding motivation may be decreased by the dietary fiber content of the diet.

**Diet and mood changes**

Nutrition and behavior are not usually considered to be closely related, but there are key areas of overlap between these fields. Behavioral factors determine the choice of foods in the diet, and any attempt to change dietary patterns must necessarily involve the central nervous system and may be associated with mood changes.

That diet influences behavior is an ancient human belief. Primitive people attributed friendly and unfriendly feelings to plants and animals and expected these feelings to be transferred to anyone who ate such foods. The reduction of dietary risk factors for chronic disease and the development of effective means to do so are key to good health.

**Eating disorders in humans**

Although infants do not begin life with a choice of foods, some of the most obvious reflexes at birth are those associated with eating. Infants learn to

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**Increasing satiety**

This study ("Comparative in vitro fermentation activity in the canine distal gastrointestinal tract and fermentation kinetics of fiber sources," G. Bosch, et al. J. Anim Sci, 2008, 86:2979-2989) evaluated the variation in fermentation activity along the distal canine gastrointestinal tract. It also assessed fermentation kinetics and end product profiles of 16 dietary fibers for dog foods using canine fecal inoculum. Results of this study can be used to formulate canine diets that stimulate dietary fiber fermentation along the distal gastrointestinal tract and stimulate the level of satiety in dogs.
associate eating with security and relief from anxiety, tension and distress. Later, children eat in conformance to cultural and familial standards. In-grained meanings attached to the roles of food in society suggest reasons that food habits can be changed only with difficulty.

Food selection includes multiple environmental, cultural, genetic, social and sensory variables that interact in complex ways. One exception appears to be an innate preference for foods that are sweet. This preference is acquired in early childhood and continues throughout life.

Selection of foods for nutritional or health reasons is a learned behavior. Infants do not have an inborn ability to select a balanced, nutritious diet. The variety of foods available has an important effect on food consumption; the more the available foods are varied, the more of them people will eat.

Reducing risk for pets
Behavior change is a key element in reducing the risk for chronic disease. Eating behaviors are acquired over a lifetime; to change them requires alterations in habits that must be continued permanently—beyond any short-term period of intervention.

For humans, dietary advice is often restrictive and viewed as depriving. It may also be incompatible with cultural or familial standards. Environmental factors such as peer pressure, advertising of high-calorie foods and alcoholic beverages may strongly counteract recommended changes.

Despite these difficulties, considerable evidence supports the effectiveness of nutrition education in changing dietary intake. These changes can reduce risk factors for many conditions, and the same can be true for pets.

This article is based on “Impact of nutrition on canine behavior: current status and possible mechanisms,” G. Bosch, et al. Nutrition Research Reviews (2007), 20, 1-16.

Pet Food Testing and Feeding Trials for Cats and Dogs

- Dental Protocols (as per VOHC)
- Palatability Testing
- Digestibility / Metabolism Testing
- Stool Quality Analysis
- Blood Level Protocols
- AAFCO Nutritional Adequacy
- Urine pH
- Weight Loss Protocols
- Customized Tests Available
- Product Safety Testing

Source documents
Available online are the supporting documents for this article.


Go to www.petfoodindustry.com/0902PETbehave.aspx to find them.
Over the past year, there seems to be a growing stream of price-increase announcements from petfood packagers, suppliers and retailers. As raw material and transportation costs have edged up, the industry has been forced to increase its prices to keep up with the accelerating costs of production—cost-push inflation in which the cost of packaging spirals upward and eventually trickles all the way through the chain to consumers.

Hill’s Science Diet raised its price several times over 2008, and a 7.4% jump came in January 2009. Nutro boosted its price 26% in three phases since fall 2007 while the company reduced bag sizes. The price increases have come more often and in larger amounts than previous years, pet store owners say, according to an article in The Record, a newspaper in Bergen County, New Jersey, USA.

The price hikes affect virtually all petfood and treat packaging materials, including film, label, adhesives and inks. These are exactly the kind of events that can inspire structural changes in our industry:

➤ Excess packaging and production waste are being attacked;
➤ Companies clamor for innovations that make their processes more efficient; and
➤ Manufacturers need to develop new strategies when purchasing raw materials and developing packaging.

Reduce waste, reduce price

The key to successful petfood packaging is to select the package material and design that best satisfy competing needs with regard to product characteristics, marketing considerations (including distribution needs.
and consumer needs), environmental and waste management issues and cost. Not only is balancing so many factors difficult, but it requires a different analysis for each product, considering factors such as the properties of the packaging material, the type of petfood to be packaged, possible petfood/package interactions, the intended market for the product and costs related to the package throughout the production and distribution process.

Packaging technology must balance petfood protection with other issues, including:

- Energy and material costs;
- Heightened social and environmental consciousness; and
- Regulations on pollutants and disposal of waste.

Source reduction encompasses using less packaging, designing products to last longer and reusing products and materials, according to Food Packaging—Roles, Materials and Environmental Issues. Specific ways to achieve source reduction include lightweighting—using thinner gauges of packaging materials either by reducing the amount used or by using alternate materials—purchasing durable goods, purchasing larger sizes (which use less packaging per unit volume) or refillable containers and selecting toxic-free products.

Technology for an economical transition

Zip-Pak has launched the TopZip Jr. retrofit system to help ease some of the packaging line pain. The new technology is economical, upgradable and has a smaller footprint than traditional stand-alone zipper applicators, Zip-Pak says. This enables companies with varying resources to provide brand-differentiating resealable packaging, according to Zip-Pak.

Traditional zipper attachment systems often require too large an investment for companies in emerging markets, or those that have recently purchased non-resealable vertical form/fill/seal equipment. The TopZip Jr. was designed as a baseline version, but is upgradable to run at higher speeds and with a wide variety of pouch formats and zipper profiles, states the company. The upgrades enable Zip-Pak to offer a highly tailored solution with a low capital investment. The system is ideal for applications that can be a challenge to store conveniently, or keep fresh.

The TopZip Jr. applies press-to-close, and can support pillow, block-bottom, quad-seal and stand-up pouches. Additional upgrades include perforation and ultrasonic sealing. The technology can run anywhere from 30 bags per minute without ultrasonics to 100 bags per minute, depending on the upgrade options.

The price hikes affect virtually all petfood and treat packaging materials, including film, label, adhesives and inks.

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Cutting color and costs

Using a color-harmonization program called Project Rainbow, Unilever is reducing the more than 100 hues it currently uses on its European packaging to just six. The company’s hope is to save tens or eventually even hundreds of millions of dollars a year. According to Advertising Age, if the rest of the petfood packaging industry followed suit, billions could be saved.

LFH, the branding and design group behind the switch, said the initial savings for Unilever in Europe amount to US$13 million to US$26 million. According to LFH, other package-goods companies have begun to express interest, and said savings from color reduction could be applied to other areas of marketing as well.

Taking the cost on packaging aesthetics into consideration, the current economic climate makes a few less blues and reds seem a far more attractive option. Advancements in printing, which have added as many as four additional colors to the old four-color process, have helped make such moves possible, reducing the needs for specialized or “spot” colors to get the right look.

Cost savings and waste reduction, according to Graham Hawkins, production director of LFH, come from buying inks on a greater scale, creating far less ink and packaging waste in the process of doing changeovers and producing final packaging. Reduced complexity can improve quality and consistency.

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Probiotics improve colon health

To determine effects of probiotics on canine colon health, 30 dogs were used. The dogs were allotted to three similar groups and were fed a premium diet twice daily to maintain their body weight. After 31 days of adjustment to the diet, two probiotic groups were given a daily oral dose (10^9 CFU/dog) of Bifidobacterium pseudolongum or Lactobacillus murinus ruminis. The third group (control) was given a placebo during the evening feeding. These treatments continued for 84 days with fecal samples being collected on the day before probiotic dosing and days 21, 42, 63 and 84. Results indicate dietary supplementation of Bifidobacterium improves the microbial ecology of the canine colon by decreasing fecal numbers of the pathogen C. perfringens.


Evaluating probiotics

Results suggest the species Lactobacillus murinus ruminis has the best probiotic potential and galactooligosaccharides have the best prebiotic potential.

Ingredient Issues | nutrition
BY GREG ALDRICH, PhD

Potato, yam or other?

In the ever widening search for novel petfood ingredients, one candidate was literally right under our feet. That is, until the last couple of years, when sweet potatoes became the “darling carb” of new products and increasingly popular in specialty petfoods. For example, sweet potatoes can now be found in:

- Elimination diets for the treatment of food hypersensitivities/allergies (e.g., salmon & sweet potato);
- As an option for pet owners wanting to provide variety (e.g., sweet potato vs. corn or rice);
- As an ingredient in the new no-grain and raw formulas; and
- As a novelty in boutique and ultra-premium petfoods.

However, almost nothing has been published regarding sweet potato nutrition or usage in companion animal diets. Given we are starting from scratch, what information is available?

Not even a potato?

Sweet potatoes (Ipomoea batatas) originated in the equatorial forests of the Americas (Peru and Ecuador) and have been cultivated for 5,000 years. They made their way to Europe following the explorations of Columbus and then on to Asia in the 16th century. Today, global sweet potato production is ranked fifth by weight, with more than 95% produced by developing countries. This is in part because sweet potatoes are well suited for cultivation on small free-holding farms in tropical climates.

Partially due to agronomic and visual similarities between sweet potatoes and yams, there’s confusion about the names, but the two are not actually related. The yam (Dioscorea spp) is a monocot tuber that originates from Africa and Asia, whereas the sweet potato is a dicot storage root from the Convolvulaceae (morning glory) family.

In fact, despite its name, the sweet potato is not even related to the potato (Solanum tuberosum). The “Irish” potato is a member of the Solanaceae (nightshade) family, which includes tomatoes, red peppers and eggplants and originates in the Andean mountain chain of South America. While the yam, potato and sweet potato are all root crops, the yam and potato taste bland and starchy and contain insignificant amounts of carotenoids. The sweet potato, as the name implies, is sweet to the taste, and the orange varieties are high in beta carotene.

That sweet taste

According to the US Department of Agriculture (USDA) National Nutrient Database for Standard Reference, Release 21, raw sweet potato (edible portion only) is mostly water (~77%) and carbohydrate (20%). On a moisture-free basis, the carbohydrate fraction is mostly starch (55%) and dietary fiber (13%), with the remainder soluble sugars. The protein level is comparable to other tubers and grains (~7%), fat is insignificant (< 0.5%) and ash (~4.4%) is a tad higher than other starch sources. The sweet potato represents a decent source of potassium (~1.5%) and is enriched with beta carotene (375 ppm) to a level nearly 60% that of carrots.

The sweet taste of sweet potatoes is developed by the enzymatic production of maltose from starch. Maltose is a disaccharide-reducing sugar composed of two glucose units in a 1-4 linkage and has a mildly sweet taste. Maltose content is negligible; however, during storage and, more importantly, cooking, carbohydrate hydrolysis occurs. As cooking temperatures exceed the gelatinization temperature (~75°C), starch is hydrolyzed to amylose by β-amylase; then β-amylase converts the amylose to maltose.

These enzymes are stable long enough during normal cooking processes for the hydrolysis to occur before inactivation at around 95°C. The variety of sweet potato, storage conditions and cooking practices all influence the production of maltose. Baking is more effective at increasing the maltose concentration than is boiling (canning). The degree to which maltose would evolve during extrusion was not found in the literature. However, one could surmise that the brief residence time in conditioning and extrusion during

Sweet potatoes are the new “darling carb” but their use in petfood is not well researched.

— Greg Aldrich
kibble production would limit maltose development.

Sweet potatoes in petfood are well liked by dogs and are neutral on palatability for cats. Although the sweet potato, like any other plant ingredient, contains some anti-nutritional components (e.g., trypsin inhibitors), these are not identified as an issue. Further, there are no case studies available on dogs or cats in which toxicity, intolerances or sensitivities are an issue.

**Processing and sourcing**

Unlike other root crops that store well, sweet potatoes have a limited shelf life. For this reason, their cultivation is timed so they can be sold fresh, or they are harvested in a “campaign” and frozen, canned or dried to chips or flour.

In canned petfoods, raw sweet potatoes can be chopped to incorporate into the batter. Upon canning, sweet potatoes will retain most of their shape but become soft in texture. In dry petfood applications, fresh sweet potatoes can be a bit more of a handling issue as they must be ground and managed with the slurry—similar to other fresh ingredients like meats, fruits and vegetables.

The other option is sourcing dry sweet potato as a chip, flake or flour. At present, sourcing chips or flakes seems more common, although sweet potato flour is reportedly used as a wheat flour extender during times of scarcity.

Sweet potato as an ingredient is not currently defined by the Association of American Feed Control Officials, so the name likely follows the nomenclature of the common name or USDA standards. Cost is a substantial challenge: Sweet potatoes can run five to 10 times the cost of common grains.

Like other novel ingredients used in petfoods, sweet potato will likely have a long-term fit. But this will be limited by the availability of animal-specific nutritional information and a more petfood-friendly supply infrastructure.

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Dr. Greg Aldrich is president of Pet Food & Ingredient Technology Inc., which facilitates innovations in foods and ingredients for pets.

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**Names and stories**

In North America, the sweet potato is often (mistakenly) called a yam. There are several stories as to why. In one, slaves of the US’s ante-bellum South mistook sweet potatoes for the yams of their native Africa and called them nyami. Another story goes that over-eager marketers in the 1930s, attempting to differentiate their sweet potatoes from another, incorrectly labeled theirs as yams—and the name stuck.

Enough confusion still exists that today the USDA requires products sold as yams (which are actually sweet potatoes) to carry the extra “sweet potato” identification. But, by whichever name they are labeled, sweet potatoes, not yams, are the more commonly available ingredient for petfood applications.
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Something to Chew On  

By Debbie Phillips-Donaldson

Combating misinformation

Here’s an experiment to try: Type “petfood” in a Google search and see how many results you get. (I got more than 66 million in mid-January.)

Besides websites selling petfood, many of these leads link to sites and blogs with “information” on pet nutrition and your products. A large number seem to have sprung up in reaction to the 2007 US recalls, so much of the content is based on emotion and a new sense of activism among pet owners. While such involvement is generally positive, it is not necessarily a reliable base for sound information on pet nutrition.

Now just imagine how many pet owners each day perform this same online search. We would like to hope that’s not the only way they seek information on petfood; ideally they’re talking with their veterinarians and reading well-researched publications as well as product labels and materials you disseminate.

But let’s face it, for some pet owners, the Internet is their main—and sometimes only—source of information. That’s pretty scary, isn’t it?

Online “awards”

Case in point: In early January a website called NaturalNews.com posted a commentary entitled, “The 2008 Biggest Stupid Act in Pet Food Award” (www.naturalnews.com/025251.html). The author, Susan Thixton, bestowed her award on several lucky recipients, including:

- The US Food and Drug Administration (FDA), multiple times, for acts such as the petfood safety meeting it held in May 2008 (“... a complete waste of time and taxpayer money,” Thixton wrote), allowing “federal law to be violated” and not informing US consumers of Chinese imported foods or ingredients;
- US Congress—Thixton essentially said it aided and abetted FDA; and
- A couple industry experts who actually have the knowledge to write and talk credibly about petfood but whose insights Thixton didn’t agree with. You may have come across Thixton’s website, the not-so-subtly named www.truthaboutpetfood.com. She wrote a book with the same name in 2006 that, according to NaturalNews.com, is being updated. Neither this site nor her own includes any information about her education, training or work experience.

But whatever her qualifications may be, the fact is, she has a presence online and quite likely a following. And she’s not alone; there are plenty of other sites and articles like this—and that’s what many pet owners find online.

What can you do?

Fighting misinformation means offering factual, impartial information:

- Make sure your own company’s website offers as much non-promotional, science-based yet layman-friendly information about your products as you can provide;
- Even better, include information or testimonials from credible third-party sources;
- Consider partnering with organizations such as the Pet Food Institute in the US or other petfood companies to offer non-biased, science-based information;
- Reach out to bloggers and other people writing about pet nutrition.

The last item is the riskiest. With some bloggers and writers who consider themselves activists and our industry the enemy, it could backfire. But some people writing online do have a background in pet nutrition and are eager to expand it. Some might welcome your input and want to make their blog or site more objective by including information from a variety of sources, including your company. Try to find an “about the author” page on the site, and look for authors with documented experience or published work as journalists, veterinarians, nutritionists or scientists.

Possibly the worst thing you could do is nothing. Ignoring misinformation won’t make it go away.

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