

March 2009

Petfood Industry

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Guide to
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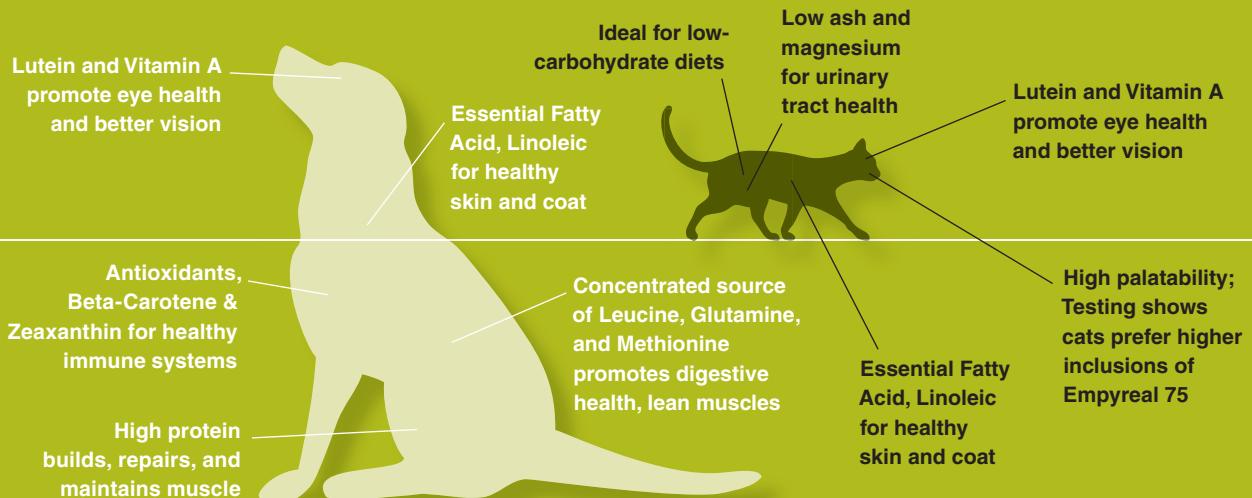
Petfood goes wild
Are your labels legal?



A promise worth keeping

Dave Carter of Pet Promise, p. 24

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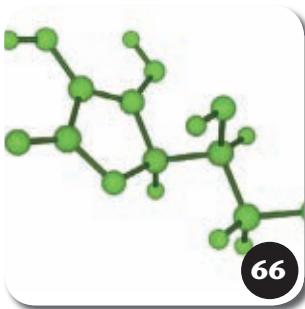


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*Photo: Diane Huntress Photography
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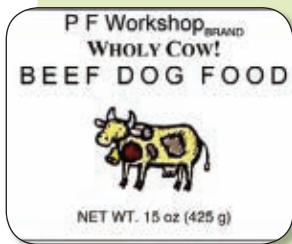
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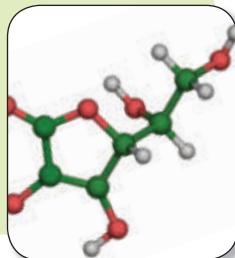
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EU regulatory changes Learn about the European Union's proposed new pet-food labeling rules, among other legislative changes. www.petfoodindustry.com/0903PETlabel.aspx



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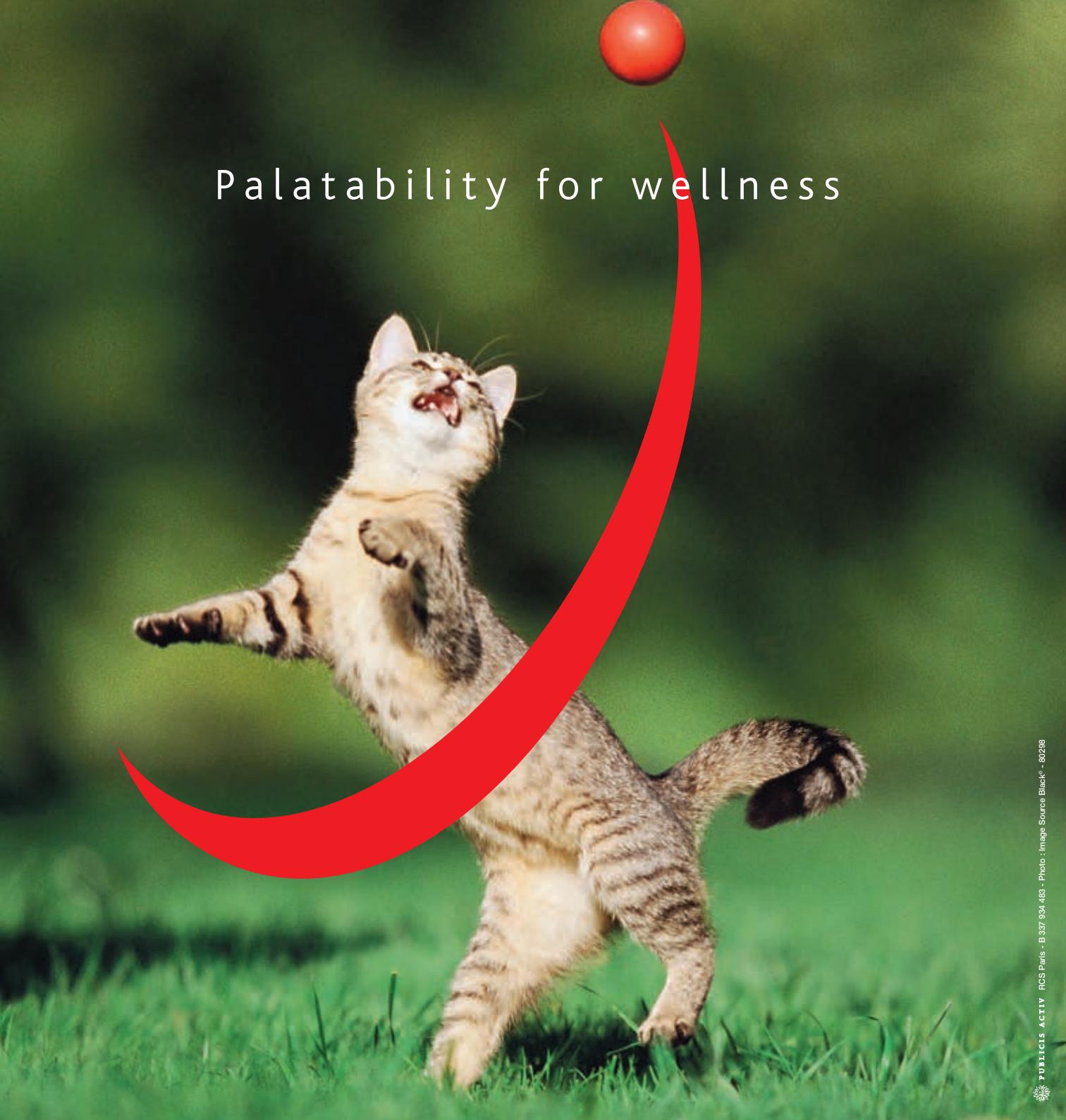
Contact the Circulation Department at 303 N. Main St., Ste. 500, Rockford, Illinois 61101-1018 USA. Tel: +1.815.966.5400; Fax: +1.815.968.0513; E-mail: jwessel@wattnet.net. Subscription print edition prices: USA \$84.00/yr, Canada \$102.00/yr, Outside USA & Canada via Airmail \$144.00/yr; \$14.00 per copy unless marked. Digital edition sent by email: \$36.00/yr. Prices in US dollars. Business or occupation information must accompany each subscription order. For change of address, contact the circulation department listed above and give BOTH old and new address.

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Not much meat

The March 2009 issue of *Consumer Reports* contains a petfood report with a firm grasp of the obvious. Its conclusion: “When it comes to buying petfood, higher cost doesn’t always mean higher quality.”

Who can argue with that? It’s true of all products and services. But, the article doesn’t tell pet owners how to find higher quality petfood options.

Eight experts speak

Consumer Reports asked eight experts in dog and cat nutrition at seven US veterinary schools what consumers get by spending more for petfood. (The publication declined to identify the experts by name.) They were also asked what they served their own pets. Most said they use a variety of common brands sold at pet stores or supermarkets.

The bottom line, says *Consumer Reports*: It’s more important to look for the overall nutrient profile of a particular petfood brand than it is to shop by price or even individual ingredients. However, the publication gives no clue as to what profile to look for.

“Your main goal is to ensure your animal is active and healthy,” says Jamie Hirsh, associate health editor at *Consumer Reports*. “That suggests the food you’re buying is doing its job. But it’s also important to know you don’t have to choose the most expensive food to get what’s best for your pet. Look for food labeled ‘complete and balanced,’ which indicates it can be the pet’s sole nourishment.”

Validating adequacy

Hirsh advises pet owners to look for labels stating that the food’s nutritional

Consumer Reports contains a petfood report with a firm grasp of the obvious.

— Tim Phillips



adequacy was validated by animal-feeding tests based on protocols from the Association of American Feed Control Officials (AAFCO), a regulatory group. That statement is a step above the other one that AAFCO allows—that a food was formulated to meet the group’s nutrient profiles, notes Hirsh. “In addition, make sure the package has contact information for the food’s manufacturer, in case you have questions,” Hirsh says.

Hirsch adds that consumers should also take into consideration the age of the pet and whether he or she has special needs. For example, cats with kidney or urinary problems might benefit from the moisture in wet food, while animals with dental issues might do better with dry food.

The meaning of labels

For petfood, there’s no official definition of natural, human-grade, premium, no fillers or gourmet. Gluten-free foods are generally necessary only for the tiny percentages of

pets that are intolerant of that protein. There’s some evidence that antioxidants—such as vitamin E—and some omega-3 fatty acids might enhance pets’ immunity or help protect against certain diseases, but the experts interviewed by *Consumer Reports* were split on whether consumers need to look for them.

Expert advice

Fortunately, the expert remarks from the article were sound. Those interviewed by *Consumer Reports* advised pet owners to be extra careful about feeding homemade diets, to feed age-specific petfoods and consider the costs of feeding wet versus dry products. For details, go to www.petfoodindustry.com/0903PETedit.aspx.

Be aware

So there you have it. The report may lack substance, but it’s good for petfood company people to be aware of it. There will be questions. ●

Read the report

To read the article from the March 2009 issue of *Consumer Reports*, including expert advice, go to www.petfoodindustry.com/0903PETedit.aspx.

Dr. Phillips is the editor of Petfood Industry magazine. He can be reached at Tel: +1.815. 966.5544, E-mail: tphillips@wattnet.net.



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Industry News

Quick hits

- ▶ Bentoli AgriNutrition Inc. announced the appointment of Dr. K. R. Gunasekar as territory sales manager in Coimbatore, India.
- ▶ The UK's Pet Care Trust Forum, June 18 to 19, 2009, will be sponsored by Burns Pet Nutrition.
- ▶ Philip Schreiber has joined Bachelor Controls Inc.
- ▶ Multivac Inc. appointed Jim Brigman as western regional service supervisor.
- ▶ Tapco recently added John Paul Santangelo and Randy LeMaster to its staff.
- ▶ The DuPont Qualicon BAX system PRC assay for Salmonella is now certified by the Association of Analytical Communities.
- ▶ Doggies.com now has a forum section as part of its services to the online dog lover community.

PetfoodForum 2009

Industry gearing up for Petfood Forum 2009 and Petfood Workshop

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 years prior. A new Petfood Forum blog is updated regularly on PetfoodIndustry.com to keep you abreast of new speakers, presentations and other exciting Forum and Workshop news. Check out the latest from keynote speaker, Dr. Marty Becker DVM, for example.

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.

For more information on both events, see p. 28 of this issue. Or contact Jackie Thrash, Tel: +1.404.760.2823, Fax: +1.404.240.0998, petfoodforum@meetingexpectations.com or contact Ginny Stadel, Tel: +1.815.966.5591, Fax: +1.815.968.0941, gstadel@wattnet.net.



PetfoodWorkshop 2009
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Petfood recall: First veterinary case surfaces

The first veterinary case of a dog sickened from tainted peanut products has been reported on the US West Coast, according to *DVM Newsmagazine*.

The dog, a 3-year-old mixed breed from Oakland, Oregon, USA, developed diarrhea after its owners fed it Happy Tails Multi-Flavored Dog Biscuits, a treat containing peanuts from the Peanut Corp. of America (PCA) that was included on the Food and Drug Administration's (FDA) recall list and sold at Albertson's grocery stores.

The sickened dog was treated with fluids and antibiotics and is expected to make a full recovery, according to the state veterinarian.

PCA shut down the Blakely, Georgia, USA, plant, and the FDA is conducting a criminal investigation after discovering that the company shipped products even after receiving positive *Salmonella* tests on the lot. PCA announced February 10 that it is also was shutting down operations at one of its subsidiary plants in Plainview, Texas, USA.

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News >

Refrigerated dog food market grows

Refrigerated, fresh dog food is a growing market that is predicted to increase to US\$473 million in annual sales by 2012, research firm Packaged Facts told *The State Journal-Register* (Springfield, Illinois, USA) in a recent online article.

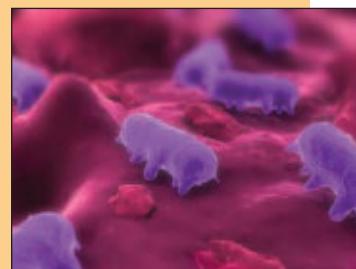
The Freshpet Select brand, for example, is a mixture of brown rice, eggs, peas, carrots and barely cooked meats (chicken, turkey, beef, liver), plus added vitamins and minerals. "It's been here over a year, and it's going really well," said Dennis McCaddon, grocery manager at the Schnucks in Springfield. "Customers are saying their dogs really love it."

Packaged Facts attributes the popularity of fresh dog food to convenience, technological advances, better distribution channels and heightened food-safety concerns.

Salmonella petfood recall expanded

The list of recalled US dog food and dog treats grew in February 2009, as a result of *Salmonella*-tainted peanut butter that originated from the Peanut Corp. of America's manufacturing plant in Georgia, USA, where some of the peanut butter was found to be contaminated with *Salmonella*.

At the start of February, just a few recalled dog treats were on the Food and Drug Administration's list of foods that may be contaminated with *Salmonella*. By the latter part of the month, the list of recalled petfoods had grown to include many more dog treats and petfoods manufactured by American Nutrition Inc. and the Scotts Co. LLC.





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PETFOOD INDUSTRY GLOBAL

India pet fair sees increase in domestic visitors. The India International Pet Trade Fair (IIPTF) ran from January 30 to February 1, 2009, at the Delhi International Expocentre in Noida, India, according to a review by the event's creator, Creature Companion.

The third annual IIPTF 2009 was considered a success. While the number of visiting foreign exhibitors and business delegates/buyers was down from previous years, reportedly due to the global financial turnaround (foreign delegates/buyers from 21 countries at the 2008 edition, whereas there were 12 countries represented in IIPTF-2009), the number of domestic visitors was up substantially.

According to Euromonitor International, the Indian pet market is projected to grow at 20% per annum, at least until 2011. This is in part due to the rise in the number of nuclear families and dual-income households.

Grupo Dibaq acquires Rodi Petfood Group. The Spanish Grupo Dibaq, a leading manufacturer of petfood and aquaculture feed in Southern and Eastern Europe, acquired 80% of the controlling entity of Rodi Petfood Group, a leading manufacturer of petfood, snacks and biscuits in Central and Northern Europe, according to a press release.

This acquisition gives Rodi access to new capital, according to the press release, which will enable it to target the northwestern European market more effectively.

"The new combination is a perfect match," said Juan Gargallo of Dibaq. "We can meet customer demand for dry and moist foods, biscuits and snacks from manufacturing and logistic facilities in Germany, Spain, the Czech Republic, Denmark, the Netherlands and the United Kingdom."



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Pets' top medical conditions of 2008

Veterinary Pet Insurance (VPI), the US's oldest and largest provider of pet health insurance, recently analyzed medical claims received in 2008 to find the year's most common pet maladies, according to a VPI press release.

The results indicate that pets visit the veterinarian for many of the same reasons humans visit the doctor, with ear infections the No. 1 condition for dogs and lower urinary tract disease No. 1 for cats. The top 10 conditions accounted for nearly 340,000, or close to 25%, of all canine and feline medical claims received in 2008.

"The large number of claims received for these medical conditions attests to their often repetitive or chronic nature," said Dr. Carol McConnell, vice president and chief veterinary medical officer for VPI. "A dog with allergies, for example, will most likely require continuing care and a cat with diabetes will be no stranger to the veterinarian's office."

Menu Foods rebounds from recall

Menu Foods Income Fund reported a narrower quarterly loss on February 18, 2009, as it recovered from the lingering effects of the costly petfood recall. Menu Foods said it lost CA\$3.3 million (US\$2.62 million) in the fourth quarter, compared with a year-earlier loss of CA\$23.9 million (US\$19 million). The company said its results were helped by increased sales volumes as its regular customers returned to the fold, as well as by three price increases in 2008 to its private label products.

Ameri-Pac expands with new facility

Ameri-Pac Inc. announced the completion of its newest production facility in St. Joseph, Missouri, USA. The new plant adds 20,000 square feet of additional manufacturing floor space, increasing capacity and production efficiency. Dry blending equipment has been moved to the new location, and a new blender increases daily dry blending capacity by 80%. The additional space also creates an additional storage capacity of at least 500,000 pounds of ingredients and finished goods.

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ZooExpo, March 21-22, 2009, Exporama Trade Fair Centre, Oslo, Norway. Contact: Norweigen Pet Trade Association (NZB), zooexpo@nzb.no, www.nzb.no.

April

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H.H. Backer Spring Trade Show, April 3-5, 2009, Atlantic City, New Jersey, USA. Contact: H.H. Backer Associates Inc., 200 S. Michigan Ave., Suite 840, Chicago, Illinois 60604 USA, Tel: +1.312.663.4040, Fax: +1.312.663.5676,

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Petfood Forum, April 20-22, 2009, Hyatt Regency O'Hare, Chicago, Illinois, USA. Contact: Tara Smalley, Tel: +1.404.760.2823, Fax: +1.404.760.0998, petfoodforum@meetingexpectations.com, www.petfoodindustry.com.

Petfood Workshop: Essential Training, April 22-23, 2009, Hyatt Regency O'Hare, Chicago, Illinois, USA. Contact: Tara Smalley, Tel: +1.404.760.2823, Fax: +1.404.760.0998, petfoodforum@meetingexpectations.com, www.petfoodindustry.com.

May

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Zoomark International, May 7-10, 2009, BolognaFiere, Bologna, Italy. Contact: Operative Secretariat, Monte Rosa 11, 20149, Milano, Italy, Tel: +39.02.4391.1502, Fax: +39.02.436763, pienesse@zoomark.it, www.zoomark.it.

BIO International Convention, May 17-20, 2009, Atlanta, Georgia, USA. Contact: Biotechnology Industry Organization, 1225 Eye St. N.W., Suite 400, Washington, D.C. 20005 USA, Tel: +1.202.962.9200, Fax: +1.202.589.2545, info@bio.org, bio.org.

HLASA/CEELA Conference, May 23, 2009, Budapest, Hungary. Contact: Dr. Sandor Fekete, HLASA Chairman, Tel: +1.361.478.4250, Fax: +1.361.478.4124, Fekete.Sandor@aotk.sziesz.hu, www.dietvet.hu.

A complete listing of 2009 events is available at www.PetfoodIndustry.com

June

S	M	T	W	T	F	S
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28	29	30				

IFT Annual Meeting and Food Expo, June 6-10, 2009, Anaheim, California, USA. Contact: Institute of Food Technologists, 525 W. Van Buren, Suite 1000, Chicago, Illinois 60607 USA, Tel: +1.312.782.8424, Fax: +1.312.782.0045, info@ift.org, www.ift.org.

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Sergeant's Pet Care acquires Chomp

Sergeant's Pet Care Products Inc. has reached a deal to acquire Chomp Inc., according to the Associated Press. Omaha, Nebraska-based Sergeant's is adding to its 400-plus products by buying the maker of Yip Yap Breath Treats and Pit'r Pat Tasty Treats. Sergeant's president and CEO Bob Scharf says buying Chomp will give his company a greater market share in pet treats and pet dental care products.

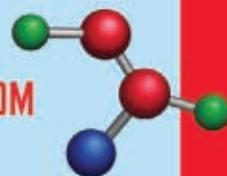
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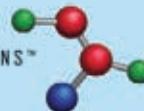
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« Freeze-dried treats

Etta Says! offers beef, chicken and lamb liver treats, freeze dried to lock in flavor. The products consist of protein, fat, fiber and moisture. According to the company, the snacks are all natural. www.ettasays.com

Fruit dog treats »»

Fruitables petfood offers several varieties of fruit dog treats, including the Pumpkin and Blueberry flavor. According to the company, the treats are a source of vitamin C, vitamin K, manganese and fiber. www.fruitablespetfood.com



« Organic jerky for dogs

Darford Brand's True jerky for dogs is 95% USDA-certified organic. The jerky comes in a Turkey and Sweet Potato flavor, is grain free and contains no artificial colors, preservatives or flavors, according to the company. www.darford.com

Grain-free entrees »»

Fromm carries grain-free dog entrees in the Surf & Turf flavor, featuring duck, salmon, chicken, vegetables, fruit, eggs and cheese. According to Fromm, the entrees have a high meat and low ash content and are rich in glucosamine. www.frommfamily.com



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To help support struggling US farmers and ranchers, the founders of Pet Promise, including Dave Carter, conceived an idea to make a natural petfood with exceptional nutrition that comes from pure protein sources.



A promise worth keeping

Business basics

Headquarters: Boulder, Colorado, USA

Officers: Dave Carter, co-founder; Anthony Zolezzi, co-founder; Myron Lyscanycz, co-founder; Julie Mueller, VP of marketing

New products: Large Dog Health, Turkey and Brown Rice (dog and cat), Chicken and Wild Salmon (dog), Turkey and Wild Salmon (cat), Chicken and Wild Tuna (cat)

Website: www.petpromiseinc.com

The founders of Pet Promise didn't start out to form a petfood company. "We are a mission-based company that's dedicated to educating consumers on ingredient quality and where their ingredients come from," explains Dave Carter, co-founder of the company. "Our mission led us to establish a brand based on

With a mission to support US farmers, natural petfood Pet Promise was born

BY JESSICA TAYLOR

source-verified protein coming from US family farmers." So Carter and his fellow co-founders, Anthony Zolezzi and Myron Lyscanycz, set out to help farmers and ranchers committed to quality, sustainability standards and the humane treatment of animals.

To help support these struggling US farmers and ranchers, they conceived an idea to make a natural petfood with exceptional nutrition that comes from pure protein sources. "We aren't just a petfood but part



The company's commitment to US-sourced and hormone-free ingredients is not only serious, but serious business.



The power of a promise

According to Pet Promise, since 2005 the petfood company has helped eliminate over 147 million doses of antibiotics in the food chain and more than 28 million doses of artificial growth hormones fed to cattle. Not only does America's farmland benefit, but consumers can see the direct impact when they purchase products for their dogs and cats, the company says.

One year of a pet owner feeding his or her dog Pet Promise can:*

- Help eliminate over 2,000 doses of antibiotics fed to chickens and cattle;
- Help eliminate over 670 doses of artificial growth hormones given to cattle; and
- Provide the dog with 80 pounds of natural beef or chicken from US farmers (and absolutely no chicken or meat meal).

One year of a pet owner feeding his or her cat Pet Promise can:*

- Eliminate over 1,000 doses of antibiotics fed to chickens; and
- Provide over 40 pounds of natural chicken to the cat.

**Based on the average annual consumption of dry and canned petfood per pet and according to www.petpromiseinc.com*

of the natural foods movement,” says Julie Mueller, vice president of marketing. “We are a mission-based company. That’s how our brand started and is why we exist today.”

A formulation for trust

Unlike many companies on the market today, Pet Promise describes its products based on what isn't in its formulations. “An educated consumer is our biggest opportunity,” attests Cart-

er. “As people become more interested in what is going on their plates, they want to know what they are feeding every member of their family—including their pets.”

From the outset, the petfood manufacturer made a commitment to “let by-products be by-gones” (its slogan). That meant eliminating the rendered proteins that have supplied the foundation for commercial petfoods for decades. “One of the most difficult challenges is that because of our high standards for ingredients, we have to work with smaller suppliers and develop strong relationships,” says Carter. “They are not always easy to find and you have to work with them on a much longer term basis.”

Because of this new approach to pet nutrition, the company selected each ingredient according to the attributes it would provide for its formulations.

- Natural meat, poultry or fish as the lead ingredient in every product;
- Brewer's rice for its highly digestible carbohydrate qualities;
- Corn gluten meal, which is high in the amino acid methionine;
- Egg product, high in lysine and linoleic acid;
- Oatmeal, provides energy from carbohydrates & protein;
- Pearled barley for its soluble fiber; and
- Soy flour, which is

Shipments of five new wet items (three cat and two dog) to increase flavor offerings recently started at Pet Promise.

high in lysine and tryptophan.

This past year Pet Promise introduced Large Dog Health for large dogs that have unique nutritional needs, according to the company. The formula contains a natural source of glucosamine that helps support joint health and mobility. Shipments of five new wet items (three cat and two dog) to increase flavor offerings also started at the end of January 2008.

Promise of purity

Mueller describes the company's key to growth as, “Attracting new users to our brand by our ‘Promise of Purity’ message and excellent product performance. Once consumers try our products, they tend to be very loyal.”



Promise wants to be known for leading the way in source verification.

This vow means consumers know where their protein is coming from—Promise wants to be known for leading the way in source verification—and other guarantees, such as:

- ▶ No animal by-products such as lungs, spleens, brains, blood, beaks, feet and feathers;
- ▶ No added growth hormones;
- ▶ No antibiotic-fed protein;
- ▶ No rendered meats such as beef, chicken or by-product meals;
- ▶ No factory-farm meat or poultry; and
- ▶ No artificial colors, flavors or preservatives.

The company's commitment to US sourced and hormone-free ingredients is not only serious, but serious business. "We are very proud that we quickly became and continue to be the #1 brand in the natural channel," says Mueller.

Looking to the future, naturally

"The overall momentum of natural petfood continues to grow and the interest among retailers grows, allowing Pet Promise to expand into pet specialty," says Mueller, predicting what she sees in Pet Promise's future. "But it is because of our strong interest from the natural products consumers that made this trend possible."

What about the entire petfood industry? "It's an industry in transition. The petfood industry was developed under a model of disposing of waste products and developed in a time when people looked at pets much differently than they do today," comments Carter. "Now that pets are becoming an important part of families, people are becoming more concerned about the health of their animals, and the petfood industry will need to respond." ●

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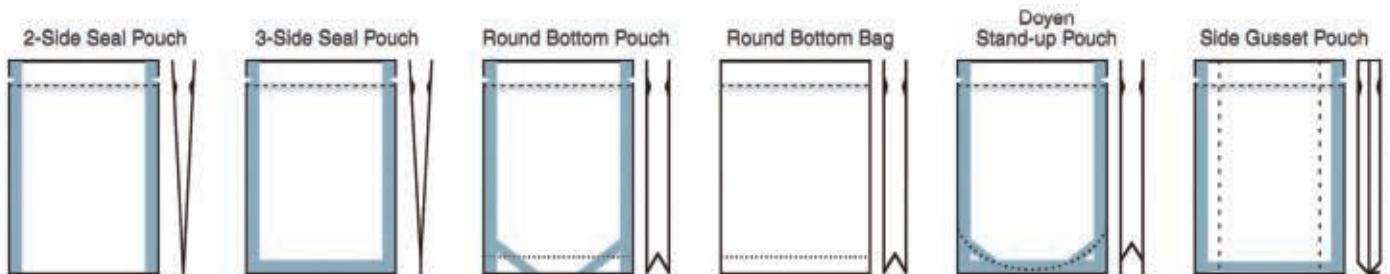
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Guide to **Petfood Forum**

Get the most out of this event—plus the new Petfood Workshop—to improve your business

How can you keep growing your business, even during an economic downturn? Come to Petfood Forum 2009 to learn new ideas, network with key suppliers and partners and reconnect with longtime colleagues.

Scheduled for April 20-22 at the Hyatt Regency O'Hare near Chicago, Illinois, USA, Petfood Forum will provide information to help you capitalize on the trends that are driving continuing growth in the industry, including humanization and health and wellness. That starts with keynote speaker Marty Becker, DVM, sharing

insights on how to leverage the human-pet bond to your advantage, and continues with Rick Rockhill, the Petco executive in charge of dog food. You'll also hear from a consumer researcher on what pet owners want in terms of sustainable petfood, plus 18 other experts on new product development, nutrition and ingredients, the latest petfood regulations, plant efficiency and much more.

Plus, you'll see posters showcasing the latest petfood research and enjoy many networking opportunities, including a new venue exclusive to Forum guests.

On these pages you'll find speaker and

topic information as of press time. For scheduling and updates, bookmark www.petfoodindustry.com/petfoodforum.aspx. For specific questions, contact Ginny Stadel, gstadel@wattnet.net or +1.815.966.5591; for help with registration, contact Jackie Thrash, petfoodforum@meetingexpectations.com or +1.404.760.2823.



Greg Aldrich, PhD, president, Pet Food & Ingredient Technology



Julie Lenzer Kirk, president/CEO, Path Forward International

Petfood Forum

Tuesday, April 21

8:00-9:30 am



Keynote: Marty Becker, DVM, is a veterinarian, author and regular contributor to Good Morning America. He provides insights on the human-animal bond and how to educate pet owners about nutrition and petfoods.

they're looking for in environmentally friendly petfood.

2:05-2:45 pm



Guerrilla marketing: Vicki Lynne Morgan, president of Animal Brands, says that instead of big marketing budgets, tomorrow's success lies in a targeted, 360-degree approach using three critical elements, technology and a "guerrilla" state of mind.

mis, lead pet market researcher for Packaged Facts, shows how communicating product benefits and tapping into the potent human/animal bond are more important than ever in these tough economic times.



Product testing with household panels: John Presutti, managing director of Market-i Research, demonstrates that with a new product launch, understanding the impact of product formulation is best assessed through extended *in situ* usage, via a household panel.

10:15-11:00 am



General session: Rick Rockhill, VP of dog food consumables for Petco, explains what retailers want from petfood manufacturers.



Ingredient sourcing and cytotoxicity testing: Jennifer Radosevich, director of R&D and regulatory affairs, explains how Kemin Nutrinsurance has instituted this testing as part of a multi-layered, early alert program for certain ingredients to better address safety concerns.

4:20-5:00 pm



The changing world and new product development: John Adams, director of Adams Developments, discusses long-term, fundamental, global movements—climate change, demographic shifts, cost of energy and raw material supply—and how they will impact the market.

11:05-11:50 am



General session: Craig Ostbo, principal with Koopman Ostbo, a marketing communications firm, reveals consumer research on what sustainability means to pet owners and what



3:30-4:20 pm
Petfood market update: the value equation: David Lum-

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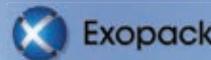
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Following Petfood Forum on April 22-23, also at the Hyatt Regency O'Hare, Petfood Workshop: Essential Training will provide a thorough overview of the petfood industry to newcomers or people who need a better understanding of functions other than their own.

For more information, visit www.petfoodindustry.com/petfoodforum.aspx or contact Ginny Stadel, gstadel@wattnet.net or +1.815.966.5591. For help with registration, contact Jackie Thrash,

Wednesday, April 22

2:00-3:00 pm



General session: Lee Linthicum, head of global food research for Euromonitor International, discusses market data, forecasts, company profiles and key trends.

3:20-4:35 pm

First round of breakout sessions (each an interactive workshop on one key area):



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



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



Energy source impact on production costs, product and the environment: Galen Rokey, petfood process technology manager for Wenger

(pictured), and Rick Scholtens, project engineer for Interstates, review the energy inputs common to extrusion and plant operations and how those sources can be used to reduce cost and environmental impact and change product characteristics.

Wednesday, April 22

8:00-8:40 am



Probiotics in veterinary nutrition: Dr. Anton Beynen, professor of nutrition and consultant to Bacterfield SA, explains the many benefits of using probiotics in petfoods.



New EU petfood marketing rules: Dr. Wolfgang Trunk, policy officer with the European Commission, gives an overview of new rules just adopted by the European Union 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, manager of regulatory affairs for Trouw

(pictured), and Ron Rompala, VP of nutrition for Blue Seal Feeds, discuss how differences in forms of chelated trace minerals and a lack of complete understanding about their mode of action create questions about the proper use of these ingredients.



Functional properties of plasma proteins: Dr. Javier Polo, director of R&D and quality assurance for APC Europe, reviews the benefits of spray-dried animal plasma for wet petfood production and as a palatability enhancer, particularly for cats.

10:05-10:45 am



Health and wellness in the global petfood market: Lee Linthicum, head of global food research for Euromonitor International, explains how the use of functional ingredients is proliferating, as are products addressing food intolerances. This creates many opportunities for petfood companies.

Managing your unsaleables: Debbie Grosh, president of DLG Strategies, addresses the problem most companies would rather not deal with: handling damaged product. But managing the problem can improve your bottom line and the environment.

10:50-11:30 am

How petfood affects behavior: Guido



Bosch, PhD, professor of animal nutrition at 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, director of ingredients/state legislative affairs for the American Feed Industry Association, discusses how identifying a regulatory approval mechanism for novel ingredients offers potential for better petfoods and opportunity for manufacturers to educate consumers.

11:35 am-12:15 pm
Packaging and marketing to today's pet parents: Jim Morris, president of Morris Packaging/Heartland Ingredients, offers insights on how today's highly involved, discriminating pet owners think and respond to marketing and packaging of petfoods.



Regulatory issues for unapproved ingredients: Bill Bookout, president 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.



Processing/production:

Galen Rokey, petfood process technology manager for Wenger, uses a virtual petfood extrusion demonstration to showcase hardware, software and other process control tools in real time.

Packaging: Scott Whiteside, PhD, associate director of the Center for Flexible Packaging at Clemson University, reviews the types of materials, equipment, processes, design and engineering considerations that go into the packaging of petfoods, as well as the petfood innovations that are leading the packaging world.

4:40-5:55 pm

Second round of breakout sessions (groups rotate among the four rooms)

Thursday, April 23

8:00-8:40 am



General session: Krista Faron, senior analyst for Mintel, shows new products and explains how they drive growth in the petfood industry.

8:45-9:25 am

General session: Tom Willard, industry consultant, gives an overview of the structure and flow of the petfood industry.

9:50-11:05 am

Third round of breakout sessions (groups rotate among the four rooms)

11:10 am-12:25 pm

Fourth round of breakout sessions (groups rotate among the four rooms)

Register online

Register for Petfood Forum 2009 and Petfood Workshop at www.petfoodindustry.com/petfoodforum.aspx.

Petfood Forum 2009 Exhibitors

As of press time, the following companies are registered to exhibit at Petfood Forum 2009 and listed below by category. Following this list, starting on p. 37, you'll find contact information received as of press time (listed by company alphabetically), with advertisers in this issue indicated.

For booth numbers, visit www.petfoodindustry.com/petfoodforum2009exhibitors.aspx.

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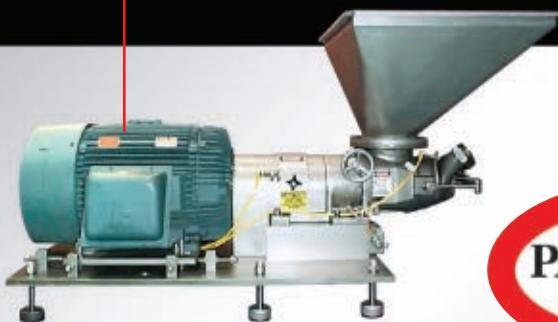
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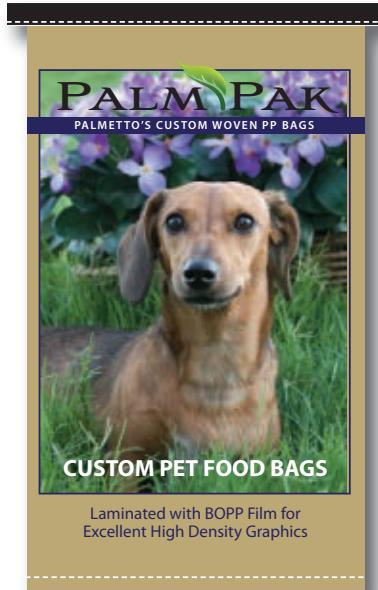
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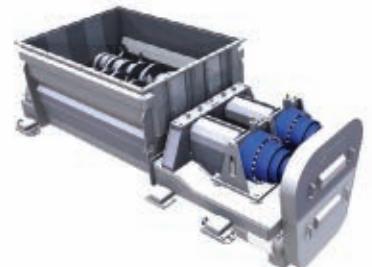
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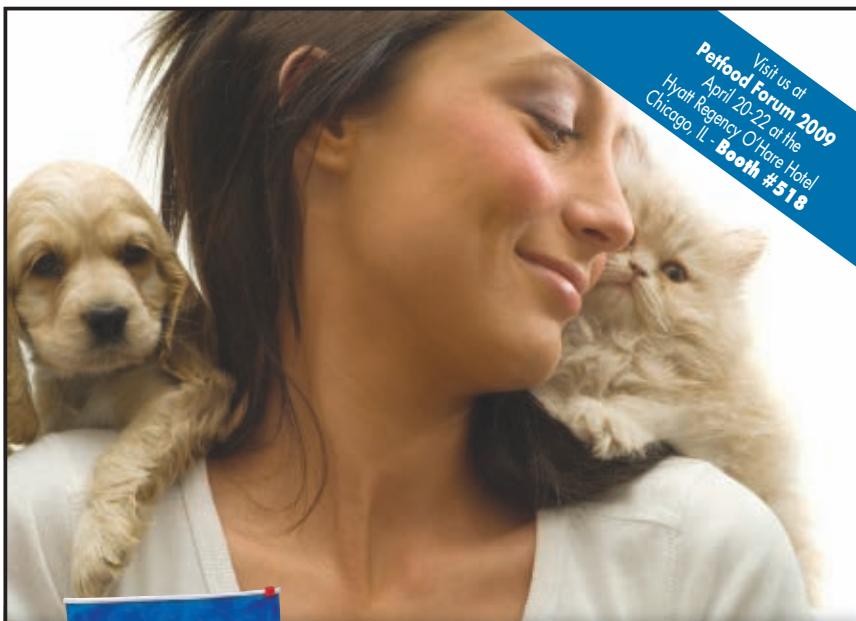
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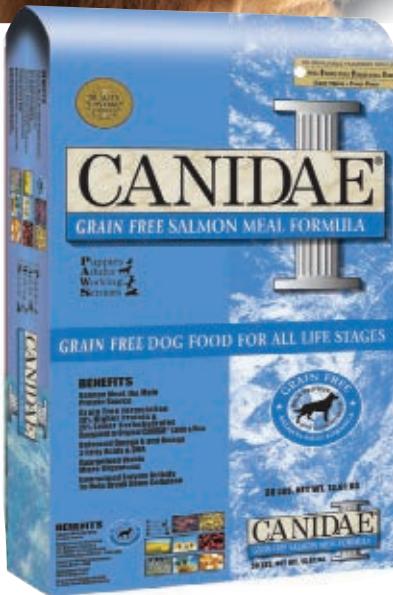
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Petfood goes wild

An improved understanding of evolution and canine and feline ancestral diets will unlock innovations

BY TIM PHILLIPS, DVM

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Canidae touts its grain-free dog and cat food formulas with various “wild” ingredients—including salmon.

Above: Examples of wild ingredients: bison and acai palm berries.

Why are petfood manufacturers touting “wild” ingredients? Promotional material for Eukanuba’s Naturally Wild products sums it up this way: “Before dogs were domesticated, meat was their key source of nutrition.

Inspired by a dog’s heritage and nutritional needs, Eukanuba Naturally Wild was developed to nourish every dog as nature intended.” Sounds good, but the science is not always clear as to what nature intended.

Unbiased scientific research on canine and feline ancestral diets has unlocked and will continue to unlock important innovations. However, sometimes marketing the concept of wild, ancestral petfoods gets ahead of the science. With that caveat, let’s look at some of the wild petfood diets that are becoming more popular.

Wild assertions

Marketers of wild-ingredient-based dog and cat foods say they provide a diet rich in quality meat with high nutrient bioavailability—the way nature intended. Other claims include:

- ▶ “We use a savory fresh protein from US Department of Agriculture in-

spected sources as the number one ingredient, and quality, low-ash chicken meal as the number two ingredient.”

- ▶ “It’s a return to your dog’s ancestral diet while recognizing its modern day lifestyle. We use only meat protein sources, healthy fruits and vegetables—no grains, fillers, by-products or artificial colors, flavors or preservatives.”

- ▶ In addition, the standard claims and disclaimers tend to apply: no grain, no by-products, roasted meat, fish and poultry, all natural, no artificial preservatives, colors or flavors, no corn, no wheat, no soy, no gluten, no fillers, chicory root for digestive support, antioxidants to protect cells, the ideal blend of omega fatty acids and chelated minerals.

For the most part, proponents of wild-ingredient products believe the ideal diet is the pre-agricultural diet on which a species evolved. They say such diets contain the foods that best suit the species’ digestive and metabolic systems and are least likely of all foods to cause an allergic reaction.

Eukanuba Naturally Wild

Iams Eukanuba’s (www.iams.com) entry into the wild petfood segment implies that there’s good market re-

search supporting the concept. Procter & Gamble, the company's parent, is famous for being a highly skilled, careful marketer—so you can bet that a lot of market research went into the idea. Products include:

- ▶ North Atlantic Salmon & Rice Formula;
- ▶ Country-Grown Turkey & Multi-Grain Formula; and
- ▶ New Zealand Venison & Potato Formula.

Evolution petfood

An early example of wild petfood marketing is the Evolution Diet Pet Food Corp. (www.petfoodshop.com), which started in 1987. It's not typical of most wild petfoods in that the products are vegetarian. I remain confused, but the company's name begs for it to be included.

Founder and CEO Eric Weisman says he founded the company after examining what went into conventional petfoods and deciding he wanted a "better alternative" for his own pets. His dogs and cats were having health issues he thought were related to the ingredients in conventional petfoods.

The ideal diet is the pre-agricultural diet on which a species evolved.

Weisman worked with Darwin Brightsman, PhD, an animal nutritionist, to formulate Evolution Diet Pet Food products. At the time, Weisman was a physician in private practice using vitamin, botanical, nutraceutical and nutrition therapy for people. Weisman notes he is still using "state-of-the-art combinations" of vitamins, herbs and nutraceuticals developed to treat joint, vascular and other diseases in sick pets at the Evolution Diet Res-

cue facility, which he has operated in St. Paul, Minnesota, USA, since 1987.

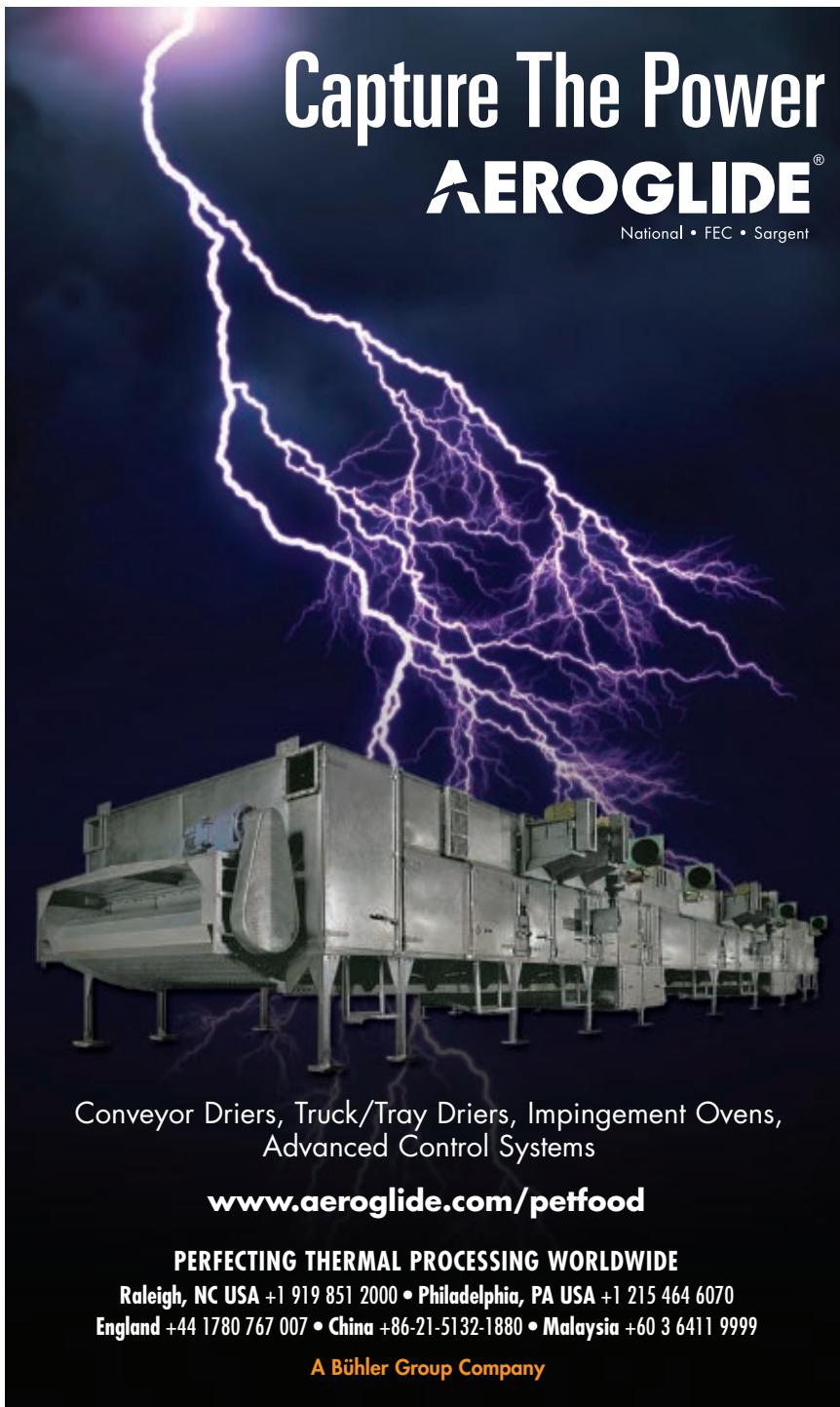
Before Grain

Merrick (www.merrickpetcare.com), maker of Before Grain products, asserts that dogs and cats do better when fed grain-free diets. This is, they

say, what nature intended. The company says a diet based primarily on

Digging deeper

Find more on evolutionary diets at www.petfoodindustry.com/0903PETwild.aspx.



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Wild people food

What do you think about making petfoods with so-called wild ingredients? Do you like the idea for your pets? How about wild foods for yourself?

Researchers estimate our human ancestors obtained about 35% of their dietary energy from fats, 35% from carbohydrates and 30% from protein. Saturated fats contributed approximately 7.5% total energy, and harmful trans fatty acids contributed negligible amounts.

Polyunsaturated fat intake was high, with an omega 6 to omega 3 fatty acid ratio of about 2:1 (versus 10:1 today). Cholesterol consumption was substantial, perhaps 480 mg/day. (S.B Eaton, 2006. "The ancestral human diet: what was



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it and should it be?" *Proceedings of the Nutrition Society*, 65, 1-6).

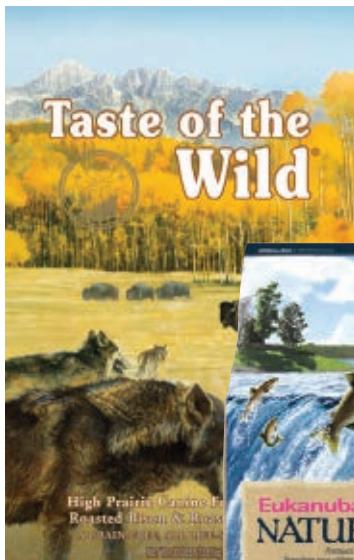
Carbohydrate came from uncultivated fruits and vegetables, approximately 50% of energy intake compared with the present level of 16% energy intake in the US. High fruit and vegetable intake and minimal grain and dairy consumption made ancestral diets base (low pH)-yielding, unlike today's acid (high pH)-producing pattern.

Honey comprised 2-3% of energy intake compared with the 15% that added sugars contribute today.

Fiber consumption was high, perhaps 100 g/day.

Vitamin, mineral and phytochemical intake was typically eight times that of today except for that of sodium.

Our knowledge of nutrition is still quite deficient. However, an understanding of the human evolutionary experience and our ancestral diets will help address this critical deficiency.



A company called Taste of the Wild boasts a High Prairie Canine formula with roasted bison & roasted venison.

ally that Before Grain products contain acai, an Amazon palm berry, and blueberries. Freeze-dried acai berries and blueberries are "carefully added to the kibble after the cooking process." Merrick contends these "super blue fruits" are high in antioxidants and anthocyanins.

Taste of the Wild

"Years of domestication have turned pets from fierce predators to best friends," contends Taste of the Wild Pet Foods. "However, modern science proves that dogs and cats still share the DNA of the wolf or wild cat. Taste of the Wild Brand Dog and Cat Food offers pets a diet dictated by genes. It allows pet owners to provide their pets the kind of natural, balanced diet that they could find in the wild."

The company has four dry formulas:

➤ High Prairie Canine Formula with Roasted Bison

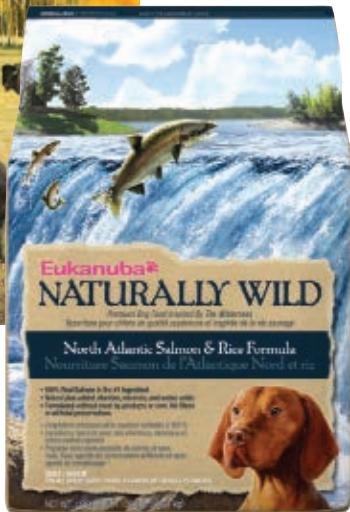
& Roasted Venison;

➤ Pacific Stream Canine Formula with Smoked Salmon;

➤ Wetlands Canine Formula with Roasted Wild Fowl; and

➤ Rocky Mountain Feline Formula with Roasted Venison & Smoked Salmon.

Iams Eukanuba has a North Atlantic Salmon & Rice formula.



Merrick Pet Care offers buffalo, chicken and salmon formulas for dogs—some containing acai berries, which have powerful antioxidants.



fresh meat, blue fruit, nutrient-dense vegetables and high-quality meat contributes to better health and longevity. Ingredients used include buffalo, beef, chicken, salmon, turkey and tripe.

Merrick points out enthusiastically

Unbiased scientific research on canine and feline ancestral diets has unlocked and will continue to unlock important innovations.

Canidae All Natural

Canidae All Natural Pet Foods offers grain-free formulas for dogs and cats. Most contain 80% protein and 20% fruits and vegetables, "designed to increase energy levels." The products contain no corn, wheat, soy, grain fractions, glutes or fillers, says the company.

Those who market wild-ingredient products believe the ideal diet is a pre-agricultural diet. This diet, they say, contains the foods that best suit digestive and metabolic systems and are least likely to cause an allergic reaction. It's an appealing idea, but the jury is still out. ●

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Are your labels legal?

A look at federal and state regulations for petfoods sold in the US

BY TIM PHILLIPS, DVM

In the US, petfood labeling is regulated at two levels: federal and state. Federal regulations, enforced by the Food and Drug Administration's (FDA) Center for Veterinary Medicine (CVM), establish standards applicable for all animal feeds (including petfood): proper identification of product, net quantity statement, manufacturer's address and proper listing of ingredients.

Some states also enforce their own labeling regulations. Many of these

states have adopted the model petfood regulations established by the Association of American Feed Control Officials (AAFCO). These regulations are more specific in nature, covering aspects of labeling such as the product name, the guaranteed analysis, the nutritional adequacy statement, feeding directions and calorie statements.

Product name

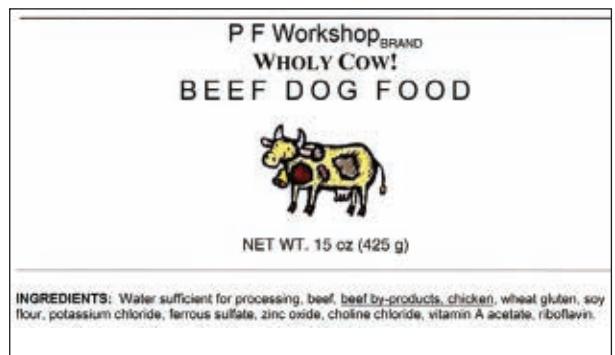
The product name is the first part of the label noticed by the consumer and can be a key factor in the consumer's decision to buy the product. For that reason, manufacturers often use fanciful names or other techniques to emphasize a particular aspect. Since many consumers purchase a product based on the presence of a specific ingredient, many product names incorporate the name of an ingredient to highlight its inclusion in the product. The percentages of named ingredients in the total product are dictated by AAFCO rules (see AAFCO's *Official Publication* for details).

Net quantity statement

The net quantity statement tells you how much product is in the container. There are many FDA regulations dictating the format, size and placement of the net quantity statement. A cost-per-ounce or per-pound comparison between products is always prudent.



AAFCO's 2009 *Official Publication* contains a great deal of information about US petfood labeling. It can be purchased at www.aafco.org.



On the label, the percentages of named ingredients in the total product are dictated by AAFCO rules.

Manufacturer information

The "manufactured by..." statement identifies the party responsible for the quality and safety of the product and its location. If the label says "manufactured for..." or "distributed by..." the food was manufactured by an outside manufac-

EU changes

Currently, the European Union has three major petfood legislative projects. They are:

- ▶ The review of the Animal By-Products Regulation 1774/2002/EC, which sets forth the permitted use of animal protein, not intended for human consumption, by various sectors.
- ▶ The proposal for a regulation on the use of feed, which will set new labeling and claims rules.
- ▶ The implementation of the requirements for reapproving additives already authorized for use in animal feed and petfood.



Trunk

Dr. Wolfgang Trunk from the European Commission will cover new European petfood regulations at Petfood Forum 2009 in Chicago, Illinois, USA, April 20-22 (www.petfoodindustry.com/petfoodforum.aspx).

For more information about the EU changes, read the analysis from Thomas Meyer, secretary general of FEDIAF, the European petfood industry association, at www.petfoodindustry.com/0903PETlabel.aspx.

turer, but the name on the label still designates the responsible party.

Ingredient statement

All ingredients are required to be listed in order of predominance by weight. The weights of ingredients are determined as they are added in the formulation, including their inherent water content. This latter fact is important when evaluating relative quantity claims, especially when ingredients of different moisture contents are compared.

For example, one petfood may list “meat” as its first ingredient and “corn” as its second. The manufacturer doesn’t hesitate to point out that its competitor lists “corn” first (“meat meal” is second), suggesting the competitor’s product has less animal-source protein than its own. However, meat is very high in moisture (approximately 75% water).

On the other hand, water and fat are

removed from meat meal, so it is only 10% moisture (what’s left is mostly protein and minerals). If we could compare both products on a dry matter basis (mathematically “remove” the water from both ingredients), one could see that the second product had more animal-source protein from meat meal

than the first product had from meat, even though the ingredient list suggests otherwise.

Guarantees

At minimum, a petfood label must state guarantees for the minimum percentages of crude protein and crude fat

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and the maximum percentages of crude fiber and moisture. The “crude” term refers to the specific method of testing the product, not to the quality of the nutrient itself.

Some manufacturers include guarantees for other nutrients as well. The maximum percentage of ash (the mineral component) is often guaranteed, especially on cat foods. Cat foods commonly

Petfoods can vary greatly in calorie content, even among foods of the same type.

bear guarantees for taurine and magnesium as well. For dog foods, minimum percentage levels of calcium, phosphorus, sodium and linoleic acid are found on some products.

Guarantees are declared on an “as fed” or “as is” basis, that is, the amounts present in the product as it is found in the can or bag. To make meaningful comparisons of nutrient levels between a canned and dry product, they should be expressed on the same moisture basis. The most accurate means of doing

this is to convert the guarantees for both products to a dry matter basis.

Nutritional adequacy statement

Any claim that a product is “complete,” “balanced,” “100% nutritious” or suggests that a product is suitable for sole nourishment that is not, in fact, nutritionally adequate is a potentially unsafe product. For this reason, an AAFCO nutritional adequacy statement is one of the most important aspects of a dog or cat food label. A “complete and balanced” petfood must be substantiated for nutritional adequacy.

Feeding directions

Feeding directions instruct the consumer on how much product to offer the pet. At minimum, they should include verbiage such as “feed ___ cups per ___ pounds of body weight daily.” On some small cans, this may be all the information that can fit. The feeding directions should be taken as rough guidelines, a place to start. Breed, temperament, environment and many other factors can influence food intake.

Calorie statement

Petfoods can vary greatly in calorie content, even among foods of the same type (dry, canned) and formulated for the same life stage. In addition, feeding directions vary among manufacturers, so the number of calories delivered in a

Check out the checklist



You can see the American Association of Feed Control Officials' label review checklist at 0903PETlabel.aspx.

daily meal of one food may be quite different from another. The number of calories in a product roughly relates to the amount of fat, although varying levels of non-calorie-containing components, such as water and fiber, can throw this correlation off.

Other label claims

Many petfoods are labeled as “premium,” and some now are “superpremium” and even “ultra premium.” Other products are touted as “gourmet” items. However, products labeled as premium or gourmet are not held up to any higher nutritional standards than are any other complete and balanced products.

The term “natural” is often used on petfood labels, although that term does not have an official definition. The term usually is intended to mean a lack of artificial flavors, artificial colors or artificial preservatives in the product.

“Natural” is not the same as “organic.” The latter term refers to the conditions under which the plants were grown or animals were raised. There are now official rules governing the labeling of organic foods (for humans or pets). ●



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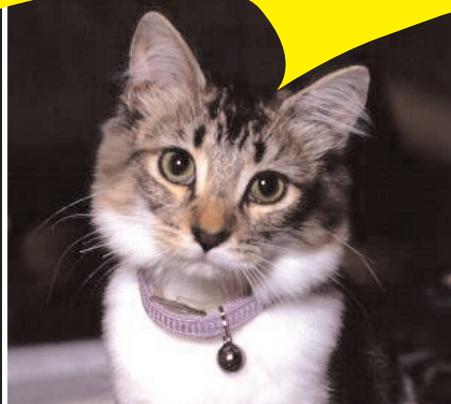
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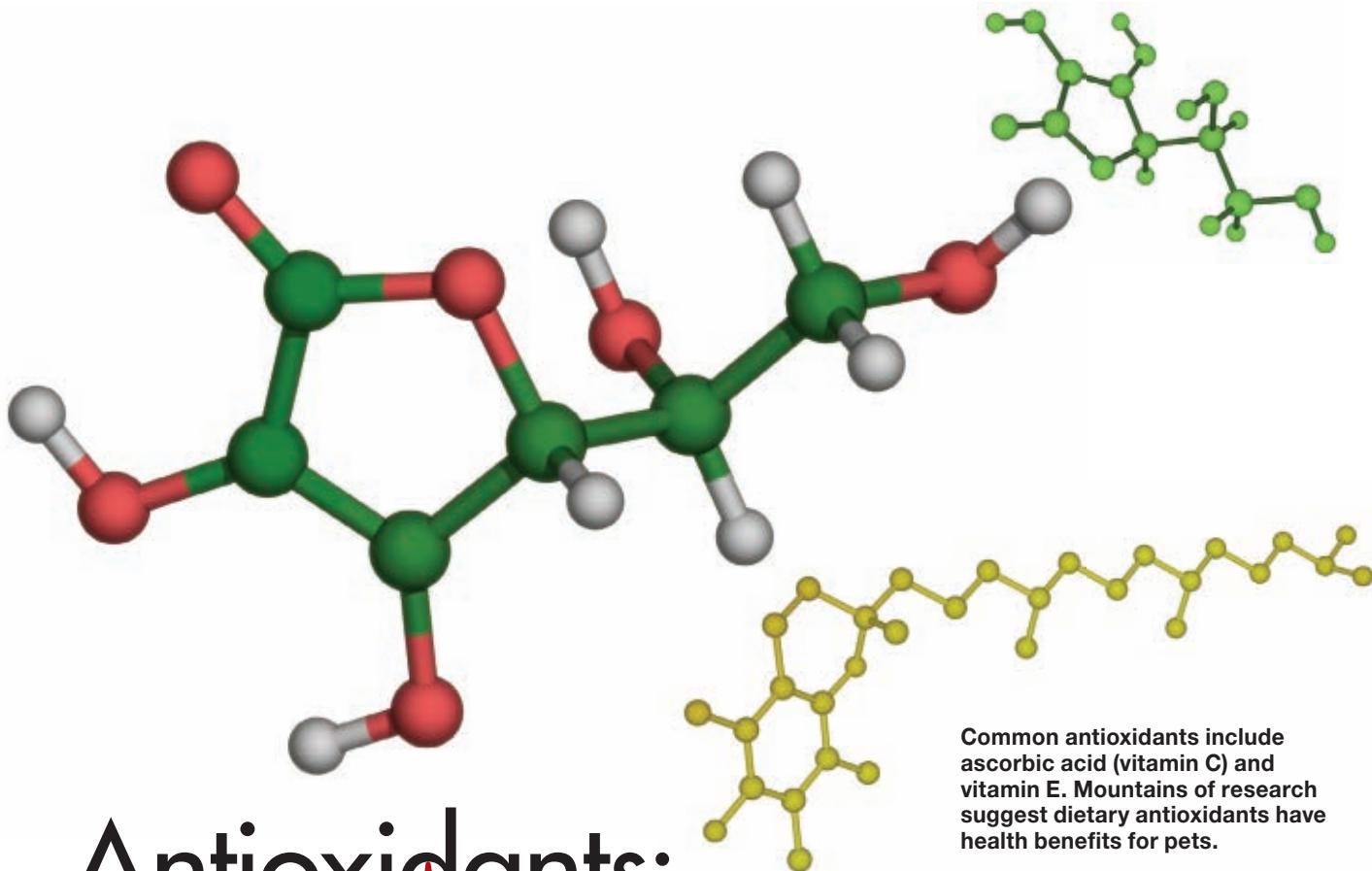


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Common antioxidants include ascorbic acid (vitamin C) and vitamin E. Mountains of research suggest dietary antioxidants have health benefits for pets.

Antioxidants: elixirs of health?

Yes and no—we have much to learn about their pros and cons in petfoods

BY TIM PHILLIPS, DVM

Oxidative stress is an important cause of many pet diseases. Hence, the petfood industry's strong interest in antioxidants. Petfood researchers have intensely studied these so-called "elixirs of health" and their role in promoting health.

Mountains of research suggest dietary antioxidants have health benefits

for pets and people. Conversely, some large clinical trials with antioxidant supplements did not detect benefits with the formulations tested.

Do not annihilate

The following reports focus on dietary antioxidant health benefits for pets. However, when considering antioxidants, it should be remembered

that more is not necessarily better. Oxidative stress is involved in the pathogenesis of many diseases, but its complete annihilation may lead to negative clinical effects in our pets. In other words, excess supplementation may be harmful (see "Antioxidants: can they be harmful?").

Inflammatory bowel disease

Khoo showed that higher levels

Online extra!

Find source materials for this article at www.petfoodindustry.com/0903PETantiox.aspx.

Antioxidants: can they be harmful?

Pets (and people) have evolved and adapted to symbiotically live with persistent, low-grade, oxidative stress. To some extent, this oxidative stress may actually benefit the physiological functioning of cells. Thus, using antioxidants to reduce oxidative stress to levels below some physiological threshold may trigger intracellular signaling pathways that damage cellular machinery.

Laviano contends this should be a critical area for future investigations (Laviano, 2007). He complains about the "media-driven assumption that oxidative stress is always harmful and antioxidant supplements are nearly always beneficial." He points out that when considering antioxidant therapy, more is not necessarily better.

What do you think? Stand up for your opinion at www.petfoodindustry.com/Discussions.aspx.

of dietary antioxidants or nutrients such as fish oil may be indicated for decreasing inflammation in cats (C. Khoo, *et al.*, 2007). He studied the effect of antioxidants on immune and inflammatory parameters in cats with inflammatory bowel disease (IBD).

Ten healthy and 10 IBD cats were fed wet food with low antioxidants (Ctrl) and test food (Aox) with added vitamin E, vitamin C and beta carotene for four weeks each in a random-

ized cross-over design. Both foods were completely balanced for adult cats. Serum vitamins E and C, DNA damage (comet assay), lymphocyte subsets and proliferation were measured at weeks four and eight.

Results showed that serum vitamins E and C were significantly increased in healthy and IBD cats on the Aox vs. Ctrl food. The Aox food tended to reduce the lymphocyte pro-

liferation activity in both groups of cats. Results showed that IBD cats have a dysregulated and hyper-inflammatory immune response compared to healthy cats.

Improving memory

Milgram's work suggests that long-term maintenance on alpha-lipoic acid (LA) and acetyl-L-carnitine (ALC) help improve memory in older dogs

It should be remembered that more is not necessarily better.

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(N.W. Milgram, 2007). These antioxidants apparently attenuate age-associated cognitive decline by slowing the rate of mitochondrial decay and cellular aging.

Beagle dogs between 7.6 and 8.8 years of age administered a twice daily supplement of LA and ALC over two months made significantly fewer errors in reaching the learning criterion on two landmark discrimination tasks compared to controls administered a methylcellulose placebo.

The improved performance on the landmark task of dogs supplemented with LA and ALC provides evidence of the effectiveness of this supplement in improving discrimination and allocentric spatial learning.

Boosting immunity

Park demonstrated that the dietary antioxidant bixin heightened cell-mediated and humoral immune response in cats (J.S. Park, *et al.*, 2007). Spe-

cifically, it inhibited DNA oxidative damage and inflammation in cats.

Bixin is an antioxidant compound extracted from the annatto seed. Female domestic cats were fed bixin daily for 16 weeks. Blood was sampled

Oxidative stress is involved in the pathogenesis of many diseases.

in weeks zero, six, 12 and 16. All cats were then vaccinated with an attenuated polyvalent vaccine in weeks 12 and 14. Skin hypersensitivity response (DTH) to saline, concanavalin A, the

vaccine and histamine was assessed in weeks 12 and 16.

Cats fed 5 mg bixin generally showed the highest immune stimulatory and antioxidative action. In this treatment, bixin enhanced lymphoblastogenic response, populations of T helper and T cytotoxic cells, NK cytotoxicity and IgG production.

Bixin also inhibited DNA damage. At 10 mg, bixin stimulated DTH response to con A, percent of total T and T cytotoxic cells, and IgG production; however, it inhibited mitogen-induced lymphocyte proliferation. All doses of bixin reduced skin response to histamine and CD18 subpopulations.

Complex impact

The evidence for supplementing petfoods for health benefits is good but mixed. Research focused on dogs and cats is really just in its infancy. It's a highly complex field that will continue to impact petfood formulation. ●

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AAFCO mid-year report: new ingredients and label terms

Because of budget restrictions for various states in the US, attendance was down at the Association of American Feed Control Officials' (AAFCO) mid-year meeting in January. (AAFCO holds its annual meeting every August, so the January one is referred to as mid-year.) But important work was accomplished, and people from the northern US who were able to attend revel in the warmer weather of Tuscon, Arizona, USA.

Still pending

Most of the pending items for the Pet Food Committee's (PFC) consideration are still being discussed by various working groups:

- ▶ The group working on regulatory language for calorie content statements and weight-related terms on dog and cat food labels is still deliberating;
- ▶ The expert panel reviewing the AAFCO Dog and Cat Food Nutrient Profiles and feeding trial protocols

New feed terms pave the way for label claims relating to specific carbohydrates.

reported good progress but had nothing for public dissemination yet;

- ▶ The group looking at issues related to possibly exempting very small treat producers from rules or fees on local sales had no report; and
- ▶ The Food and Drug Administration

fit when labeling a specialty petfood.

For example, minimum and maximum salt guarantees may make sense for cattle feed but not for a food for iguanas or guinea pigs. Expressing guarantees in terms of mg/lb while dog and cat food labels guarantee the same nutrients

Also on the agenda: edited GMPs and food for pets other than cats and dogs.

— David Dzanis



(FDA) reported it is working daily on developing the new federal petfood regulations mandated by the FDA Amendments Act of 2007 but cannot release details until a notice is published in the Federal Register.

Guinea pigs, not pigs

An item introduced for PFC consideration was a proposal to change AAFCO PF4 with regard to guarantees for specialty petfoods—those for birds, reptiles, hamsters and other species besides dogs and cats. Currently, the regulation refers back to the AAFCO Model Regulations for livestock feeds, a poor

in mg/kg is also confusing.

The amendments to the regulation would allow specialty petfood guarantees to follow the same format and units as ones for dog and cat foods. This language actually was proposed a few years ago, along with other changes to PF4, but when that latter issue was dropped, so was this language. More discussion is expected at the annual meeting.

Edited GMP regulations

After several years of deliberation between the Model Bill and Regulations Committee (MBRC) and the Feed Manufacturing Committee, final editing of the Model Good Manufacturing Practice (GMP) Regulations for Feed and Feed Ingredients was completed and is moving to the AAFCO board. When eventually enacted, these regulations will impose additional requirements on animal feed—including petfood—manufacturers to comply with handling, processing, transportation and record-keeping provisions.

The recommendations from PFC regarding new regulations for raw milk products were accepted by MBRC. These now need to go to the AAFCO board and membership for final action.

The new rules will have minimal impact on petfood products. Rather,

they are designed to address raw milk products that are sold under the guise of animal feed to elude state human health regulations but in reality are intended for human consumption.

New fiber source

Most of the items discussed in the Ingredient Definitions Committee (IDC) had little bearing on petfood except for ground pecan shell, which was previously reviewed and found acceptable by FDA as a source of dietary fiber. While accepted for use in all animal feeds, the item was proposed by a petfood company, so it is safe to assume this ingredient will be used at least in dog and cat food formulations in the foreseeable future.

With IDC's acceptance of the new definition, it still has to jump through a few hoops within AAFCO before it is officially recognized. However, it is anticipated that the definition will appear in the 2010 edition of the *AAFCO Official Publication*.

Carb claims

IDC also accepted a new feed term for dietary starch. At the last meeting, the feed terms for sugars and fructans were accepted. These all came from work by a group under the Feed Labeling Committee (see below), whose charge is to develop a means to allow for carbohydrate-related label claims.

Presently, AAFCO Policy Statement #1 discourages guarantees for carbohydrates or nitrogen-free extract as neither necessary nor meaningful for the purchaser's information. However, that policy was last amended in 1963.

The working group recommended the policy stand on the basis that "carbs" is a vague term encompassing a lot of different compounds. But these new feed terms pave the way for label claims relating to specific carbohydrates of interest in both equine and pet nutrition.

There was also a proposal to delete two definitions—ground soybeans (AAFCO #84.1) and soybean hulls (AAFCO #84.3)—on the basis that the Model Bill already exempts these commodities from the definition of commercial feed.

Ground pecan shell was previously found acceptable by FDA as a source of dietary fiber.

However, the universal concern among attendees was that these deletions would complicate what to call these materials when mixed with other ingredients to make a commercial feed. The proposal was defeated.

Use on labels

With definitions for dietary starch, sugars and fructans established, the working group under the Feed Labeling Committee will continue its deliberation on how these terms can be used on labels. For example, it will attempt to define criteria as to what levels in a product constitute low dietary starch/sugars and how claims are to be supported by guarantees. While the working group will address these issues both for petfoods and animal feeds (particularly horse feeds), the recommendations regarding petfoods will likely be passed through PFC before going to MBRC. ●

Dr. Dzanis is a writer and independent consultant on nutrition, labeling and regulation. Contact him at Tel: +1.661.251.3543; E-mail: dzanis@aol.com.

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Is canola oil toxic?

Canola oil has become an especially popular ingredient in human nutrition circles because of its heart-healthy message. This popularity has begun to migrate to petfoods with a few specialty products that contain canola oil. But, is adding this oil to petfoods wise?

Some mistaken websites contend that canola oil is toxic to man and animal alike. This is unequivocally false. Years of published studies in laboratory animals and humans have shown it to be nutritious and safe, and it is recognized as such by regulatory and health agencies around the world.

It is true, however, that we lack research about canola oil being fed to dogs or cats. This is a gap, but not an indictment. In the absence of direct evidence, maybe a bit of background would be beneficial in order to dispel the myths and provide an understanding of whether canola oil has a place in pet nutrition.

A checkered past

Canola oil wasn't always in vogue. It owes much of its newfound popularity to a name change, along with decades of hard work by researchers, plant breeders, growers and trade associations. In the years leading up to, and during, World War II, canola was known solely as rapeseed. A member of the *Brassica* family, canola/rapeseed is related to turnips, cabbage, mustard, broccoli and brussel sprouts.

Rapeseed, the progeny of *Brassica campestris* (a seed variety) and *Brassica napus* (a forage variety), was originally grown for its oil. This oil had a high content of erucic acid

What we know about feeding it to dogs and cats is extrapolated from other species.

— Greg Aldrich



(an omega-9 fatty acid) that made it an effective industrial lubricant important to the war effort. Unfortunately, consumption of rapeseed by livestock led to an enlargement of the heart and poor performance as a direct result of erucic acid.

No reports of issues with acceptance or adverse reactions have surfaced in the veterinary community.

The hull from the rapeseed was also high in lignified fiber, which was poorly digested and contained a goitrogenic (thyroid enlarging) glucosinolate (glucose-amino acid compound). These negatives made rape-

seed unsuitable for food or feed. This was a real challenge following the war as many temperate areas of the world where rapeseed had been grown no longer had a market for their crop, and few alternatives such as soybeans or corn were adapted to the climate or growing season.

Plant breeders to the rescue

Varieties low in erucic acid and glucosinolates (the so-called double low cultivars) were developed using classic plant breeding techniques. But, as current myths demonstrate, the negative connotations associated with rapeseed's name persisted. So, a name change was in order. The new name "canola" is a conjunction of "Canada oil low acid," which aptly describes the location and outcome from breeding efforts.

To assure this carries through to the consumer, there are standards for what qualifies rapeseed as canola. In the US, canola is defined as "seeds of the genus *Brassica* from which the oil shall contain less than 2% erucic acid in its fatty acid profile and the solid component shall contain less than 30.0 micromoles of any one or any mixture of 3-butenyl glucosinolate, 4-pentenyl

glucosinolate, 2-hydroxy-3-butenyl, or 2-hydroxy-4-pentenyl glucosinolate, per gram of air-dried, oil-free solid...” (US Code of Federal Regulations).

Health considerations

Canola oil is rich in oleic acid (an omega-9 fatty acid that is about 60% of the oil), has significant levels of the essential linoleic acid (an omega-6 fatty acid that is about 19% of the oil) and beneficial levels of the omega-3 linolenic acid (9% of the total). The oil is also reported to be rich in vitamin E (alpha and gamma tocopherols), vitamin K (as K1; phyloquinone) and have measurable levels of phytosterols such as stigmasterol, campesterol and beta-sitosterol (US Department of Agriculture, 2009). There are also specialty varieties with elevated levels of oleic acid (70%) to improve shelf life, or enriched with gamma-linolenic acid (GLA, a special omega-6 fatty acid) as an option to borage or evening primrose oil.

Canola oil inclusion in the diets for people and experimental animals has been reported to lower cholesterol, inhibit cardiac arrhythmias, lower blood pressure, reduce body fat composition and improve weight control as a result of its low content of saturated fatty acids and elevated levels of mono- and poly-unsaturated fatty acids. While interesting, these heart-healthy factors would not be the prime motivators for inclusion in pet diets.

Canola oil in a pet diet contributes a significant amount of the essential nutrient linoleic acid. With its content of linolenic acid, it helps narrow the ratio of these two fatty acids to a level consistent with the values suggested by the US National Research Council (2006). Any concern that canola oil, with its abundance of monounsaturated oleic acid, could impede the production of anti-inflammatory mediators is unnecessary.

Formulation perspective

From a formulation perspective, canola oil is commonly used in home-made “elimination diets” (used to

Canola oil inclusion in the diets for people and experimental animals has been reported to lower cholesterol.

identify and eliminate allergens)—partly because of its novelty to the pet but also because of its availability to pet owners. In these applications, no reports of issues with acceptance or adverse reactions have surfaced in the veterinary community. In other spe-

cialty diets, canola oil is often requested for addition as a dietary option, i.e., instead of animal or poultry fat.

In comparison to animal and poultry fats, canola has a comparable to higher level of linoleic acid and also brings along some omega-3 fatty acids. So, it can be a reasonable option in these circumstances. However, as noted previously, what we know about feeding canola oil to dogs and cats is an extrapolation from other species at this stage. While all logic would suggest that this is a safe and nutritionally effective option for our petfoods, there would be real value in confirming this with dog and cat validation studies. ●

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

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Market Report

Surprise: US petfood sales solid in 2008

During this first quarter of 2009, petfood industry participants have every reason to breathe a sigh of relief—and to take a deep breath. Looking back over the past year, it's reassuring to see that the market has been living up to its reputation of being recession-resistant, with US sales up 6.4% to US\$5.9 billion during the 52-week period through November 2, 2008, in outlets tracked by Information Resources Inc.'s (IRI) *Infoscan Reviews* (supermarkets, drugstores



In this market climate, one thing marketers and retailers cannot afford is complacency.

and mass merchandisers except Wal-Mart). Packaged Facts says overall US petfood market sales increased 5.5% in 2008, to US\$17 billion for the year.

Yes, much of this growth stems

from rising materials costs, with the US producer price index for petfood up 15% in 2008 compared with 2007 and the consumer price index up 11%. But the fact that US consumers are

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Table 1: Share of US pet-food spending by income

By 2007, households earning US\$70,000 or more annually had more than doubled since 1997.

Source: Packaged Facts, based on US Bureau of Labor Statistics Consumer Expenditure Surveys.

Year	Income over US\$70,000	Income under US\$70,000
1997	23.4%	76.6%
1998	27.2%	72.8%
1999	30.9%	69.1%
2000	28.1%	71.9%
2001	32.2%	67.8%
2002	32.8%	67.2%
2003	36.4%	63.6%
2004	43.6%	56.4%
2005	42.7%	57.3%
2006	45.8%	54.2%
2007	49.8%	50.2%

continuing to demonstrate a willingness to pay more for petfood—with the average household expenditure increasing 68% from 1997 to 2007 and 10% in 2007 alone—is a good sign indeed.

Recalls' impact continues

Rather ironically, the worst disaster in petfood history, the spring 2007 recalls, appears to be having an insulating effect during the down economy as manufacturers and consumers continue to place a premium on higher-quality ingredients and product safety. It is this very focus, Packaged Facts believes, that caused the market to do even better in value sales during 2007 than it had in previous years, as consumers converted to higher priced foods across all channels, from mass-market to pet specialty to natural supermarket.

Although many market watchers wondered whether the consumer switch to higher-priced petfood categories would last, the IRI retail sales returns suggest this trend is in fact

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Market Report >

returns suggest this trend is in fact demonstrating staying power and will remain a major market driver in the years ahead. Also good news is the fact that fuel and basic ingredient costs are down, implying better margins in the months ahead.

Premium demographics still key

Petfood market value continues to shift into the pocketbooks of premium demographics, with households earning US\$70,000 or more annually claiming four additional percentage points worth of petfood spending in 2007 compared with 2006. That means this group now accounts for half (49.8%) of all US petfood spending—up from 23.4% in 1997 (see Table 1, p. 75).

This matters not just because it shows that marketers fielding higher priced foods are handily hitting their mark, but also because these consumers are in a better position to weather the economic downturn. Often they are also the same better educated shoppers most likely to pay attention to product ingredients and claims and to view higher priced petfoods in terms of their potential health dividends.

Still the best insurance

Despite the good news about upscale pet owners, two factors at play in 2009 should give pause to even the most bullish petfood market observers:

1. The recession; and

2. The question of just how much market value can be squeezed into (or out of) those higher-income households.

The recession will almost certainly put a damper on value sales during 2009, with even higher-income consumers looking for ways to save. At the same time, more moderately priced premium products continue to infiltrate the market, giving pet owners more price point options in products that are increasingly looking alike.

For example, the practice of prominently featuring whole ingredients—meat, fruits and veggies—on product packaging is no longer restricted to specialty products but has also become widely characteristic of significantly less expensive mass-market petfoods.

In this market climate, one thing marketers and retailers cannot afford is complacency. Rather, now more than ever it's essential that petfood market participants clearly communicate the specific health benefits of their products and position themselves on the front line of preventive pet healthcare. ●

*This information is based on the Packaged Facts report *Petfood in the US: Health, Humanization and High Quality Ingredients in an Increasingly Value-Driven Global Market (January 2009)*, www.packagedfacts.com.*

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(FASEB J. 22:444.6) A discussion of the factors known to regulate expression of a peptide transporter (PepT1) including development, diet, hormones, diurnal rhythm and disease.

Man's best friend?

We are a nation of dog lovers. Never before in our history have we spent more time, money and emotional energy on a group of animals kept solely for companionship. Petfood is a multibillion dollar industry, and pet owners are spending more than US\$11 billion each year on veterinary care. This devotion is further illustrated by the exponential growth of the pet supply industry, including increasing numbers of pet superstores, play parks, training centers and doggie day care centers.

During the 1980s, recognition of the human-animal bond led to serious study of the roles that dogs play in our lives. These studies have shown that pets provide significant benefits to our emotional, physical and social well-being. It is ironic, then, that at a time when we recognize and appreciate our bonds with canine companions, dark elements of this relationship are equally pervasive. Animal shelters in the US kill between 3 and 4 million dogs and cats annually.

How did we come to have such paradoxical treatment of our canine companions? This question is explored through an examination of the ancestry of the dog and the prevailing myths and facts about canine domestication.

Source: L. Case, 2008. *FASEB J.* 22:444.6.

Peptide utilization

In ruminants, peptides make a contribution to the portal-drained visceral flux of total amino acids and are detected in circulating plasma. Peptides can be utilized by the mammary gland for milk protein synthesis and by a variety

of other tissues. Covered are the factors known to regulate expression of PepT1 including development, diet, hormones,

diurnal rhythm and disease.

Source: E.R. Gilbert, *et al.*, 2008. *FASEB J.* 22:444.6.

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Product News



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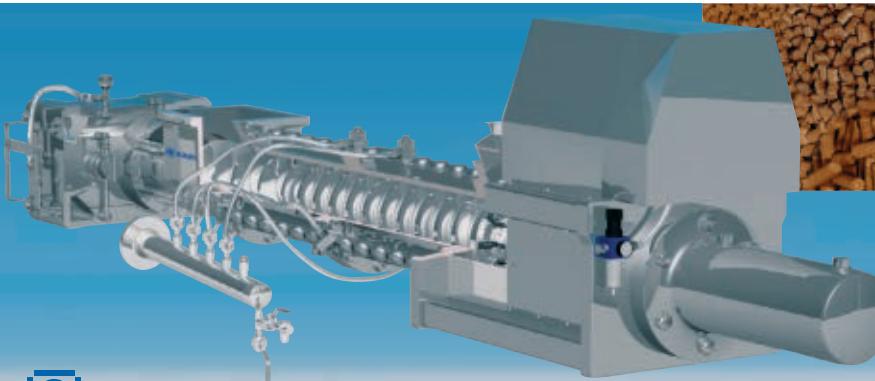
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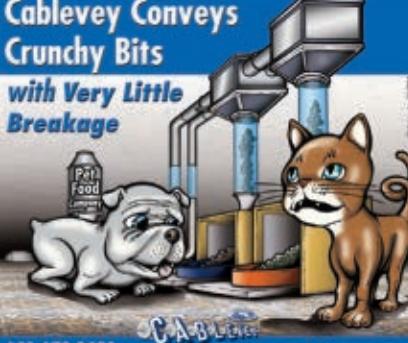
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The R word

At Global Pet Expo (GPE) 2009, held in Orlando, Florida, USA, in February, the dreaded “R word”—recession—reverberated in the aisles and meeting places, just as it has in every gathering place lately. But in this case it was accompanied by another R word: resistant. As in, can we believe what we hear about the pet industry being recession resistant?

The American Pet Products Association (APPA), organizer of GPE, was pushing this line hard, claiming the number of booths this year was even with GPE 2008 and the number of retail buyers was up 10%. Very few exhibitors or attendees seemed to believe either claim, judging by simple observations of the show floor. But APPA did have some solid data to back its headlines about a robust and resilient industry.

More spent on petfood

In a preview of its *2009-2010 APPA National Pet Owners Survey*, the association announced that overall US pet spending totaled US\$43.2 billion for 2008, up almost 5% from 2007's total of US\$41.2 billion. As usual, petfood was the largest segment at US\$16.8 billion, representing a 3.7% increase from 2007, which ended at US\$16.2 billion. (APPA's petfood figures are lower than those from Packaged Facts; see “Market Report,” p. 74.)

Survey respondents reported spend-

Online resources

APPA, www.americanpetproducts.org

DVM Newsmagazine, <http://veterinarynews.dvm360.com>

Brakke Consulting report, <http://www.brakkeconsulting.com/studies/economy.shtml>

Advertising Age, www.adage.com

Is the pet industry truly recession resistant?

— Debbie Phillips-Donaldson



ing US\$229 on dog food and US\$203 on cat food for the previous 12 months (namely, 2008). This compares to US\$217 spent on dog food and US\$188 on cat food in 2006, the last time the survey was conducted.

Realistic projections?

Perhaps even more heartening, APPA projects that this year the US pet industry will grow nearly 5%, to a total of US\$45.4 billion, with US petfood sales growing 3.6% to US\$17.4 billion by the end of 2009. During a press conference, Bob Vetere, president of APPA, said he believes petfood and treats will be the leading edge of a recovery from any slowdown the pet industry may be experiencing.

APPA bases its projections on recent trends. For example, veterinary services is the fastest-growing segment of the US pet industry, with nearly 10% growth in each of the last three years. In 2007, it overtook pet care supplies as the second largest industry segment (petfood being first). APPA projects veterinary care to grow another 10% this year.

I've heard recent anecdotal reports that companion animal veterinarians in the US are seeing their revenues decline. A study by Brakke Consulting at the end of 2008 showed some US pet owners were cutting back spending, including on petfood and veterinary services, as a result of the recession. But according to a poll *DVM Newsmagazine*

took at the end of last year, 60.4% of responding veterinarians have seen their accounts receivables remain the same over the past six months, while another 20% have seen an increase.

Thank humanization

This often conflicting information may be reconciled by the most important driver behind the industry's growth the past few years: humanization. Vetere mentioned several consumer opinion polls showing that US pet owners are willing to sacrifice spending on themselves before they spend less on their furry “kids.” One poll came from *ShopSmart* magazine last year, which said female shoppers are more likely to buy cheaper brands of everything from medication to milk than switch to less-expensive petfood and pet care items.

In a February article in *Advertising Age* magazine, Bill Pearce, Del Monte's senior VP/chief marketing officer, said that because of such research, the company is increasing marketing for several of its petfood brands. “Petfood is one of the things that [consumers] can tell you, ‘I will change what I feed my family before I change what I feed my dog,’” he said. ●

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



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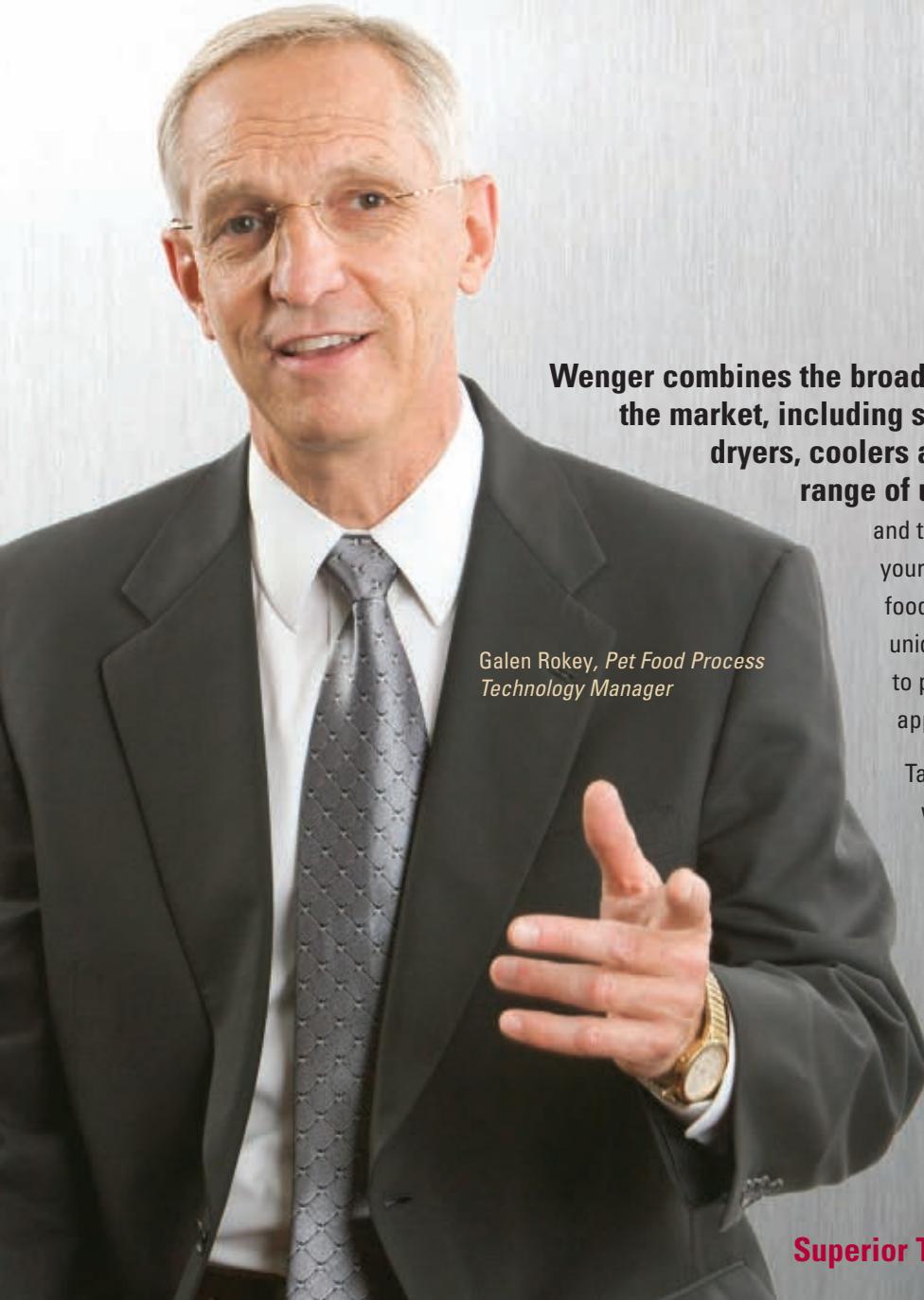
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