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Petfood Industry

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www.PetfoodIndustry.com

Guide to
Petfood Forum Asia



What are
Chinese
pet owners
buying?

Under the
microscope:
Salmonella
control

STILL GROWING

TOP 10 GLOBAL PETFOOD PLAYERS

The most successful companies remain industry leaders and continue to reach new heights even in an uncertain economy

Digital version at www.petfoodindustry-digital.com



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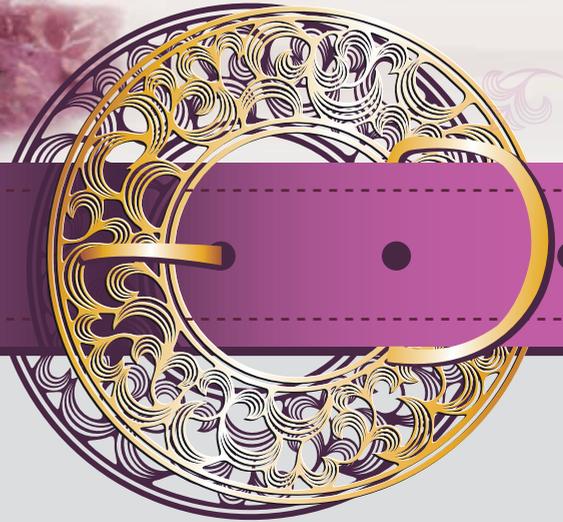
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On the cover: Even during a global recession, the top petfood companies around the world have continued to thrive.

Photo by Willie Cole, Fotolia.com

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ASIA 2010



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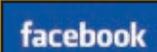


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Community

Petfood-Connection: Finalizing payment with companies in China

www.petfood-connection.com/profiles/blogs/finalizing-payment-with

Daily Tweets

www.twitter.com/petfoodindustry

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www.companies.to/petfood-connection.com

Petfood Industry TV

www.youtube.com/user/petfoodindustrytv

Online exclusives

Profiles: Top 10 petfood companies

Read more about the top global players and their brand philosophies.

www.petfoodindustry.com/Top10extras.aspx

Timelines: Worth celebrating

Delve into the histories of petfood companies and suppliers celebrating significant anniversaries.

www.petfoodindustry.com/Milestones.aspx

Article: Controlling mycotoxins

Karin Griessler, technical manager with Biomin, explains how mycotoxins can present such a risk to petfood but also can be controlled.

www.petfoodindustry.com/Mycotoxins.aspx

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Something to Chew On

Debbie Phillips-Donaldson

Share your thoughts

Comment on this month's issue at Petfood-Connection.com or e-mail editor@wattnet.net.

Innovation still drives success



Our industry continues to grow because you keep creating healthier, more convenient and appealing products.

BUSINESS AND MARKETING experts have always known the way to continued growth and success is through innovation. In no industry is that more true than petfood.

The fact that our industry has continued to grow, despite the global recession, is at least partly because petfood manufacturers keep finding and creating new ingredients, formulations, processes, formats and packaging to make even healthier, more convenient and appealing products.

This is true of the pet industry overall. In 2008, the number of new pet product launches in the US alone hit 1,074, compared with 957 in 2007, according to Packaged Facts (citing Productscan Online from Datamonitor). And that's with the recession officially starting in December 2007 and hitting the US economy hard in September 2008.

In "Top 10 global petfood players" (p. 24), you can see the new product trend continuing for petfood. Data from Mintel show the top 10 companies for new cat and dog food product launches globally for 2009 through October. The total number of new products from these leaders has increased compared with the amount from the top 10 for the same period through 2008: 648 new cat food products for 2009 vs. 625 in 2008 and 615 new dog food products in 2009 vs. 585 in 2008.

Over the last several years, the top 10 companies for new petfood products have

included several from rapidly growing regions such as Latin America (Nutriara Alimentos, for example) and Asia (Nisshin Seifun Group). In fact, Asia is the only region where the growth rate in cat and dog food sales is expected to be nearly the same over the next five years as in the previous five (see p. 39).

YOU CAN FIND examples of some new cat and dog products starting on p. 18. As you have probably noticed, we're introducing a few changes in the magazine, and that's one of them: We've expanded this department, combining new retail products (for consumers) with new products from suppliers (for manufacturers). We've also added a larger Industry Calendar (see p. 64).

In contrast, we've downsized the news section (p. 10), because by the time we can get news into a printed magazine, most of it is not so new! But rest assured we will continue to update news online as frequently as possible and deliver it to your inbox regularly via our e-newsletters, *Pet e-News* (bimonthly) and *Nutrition News* (monthly). You can sign up for both free newsletters www.wattnet.com/subscription/petsub.html.

SPEAKING OF ONLINE, we will be carrying many of these changes through to our website, PetfoodIndustry.com, this summer with completely new functionality and features, including more blogs and better access to other media such as videos, podcasts and eLearning. Please stay tuned for updates throughout the year.

We hope you enjoy the magazine's new look and, especially, continued success in this new year. ■

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

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Industry News

Quick-Hits

- Horizon Systems Inc. has appointed Alex Gordzica as its corporate compliance engineer.
- American Dehydrated Foods announced the addition of Aime King to the position of sales and marketing manager.
- Ken Chancey, president of wholesale distributor Pet Food Ltd., died on December 2 at the age of 53.
- Castor & Pollux Pet Works has appointed Robb Caseria as CEO and Andrew Mitchell as VP of sales & marketing.

Last chance to save on Petfood Forum Asia

Early-bird registration for this dynamic event, and 20% savings, end January 18. Petfood Forum Asia will take place March 3 in Bangkok, Thailand in conjunction with the largest feed event in the world, Victam Asia.

Headline speaker Dr. George C. Fahey, PhD, of the Department of Animal Sciences at the University of Illinois, is a noted expert in companion animal nutrition and will be sharing his research on feline nutrition. For information on other speakers and to register, visit www.petfoodindustry.com/petfoodforum.aspx.

PetfoodForum 2010
ASIA

Learn more

The latest news and updates are always on www.PetfoodIndustry.com

PetfoodWorkshop 2010

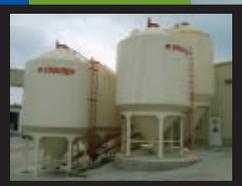
All you've ever wanted to know about pet nutrition ...

... You can ask the experts at Petfood Workshop: Hands-on Nutrition!

This interactive symposium, scheduled for April 14-15 in Chicago, Illinois, USA, will feature a panel of experts answering your questions about companion animal nutrition issues. The panel will include noted nutritionists such as consultants Greg Aldrich, PhD, and Tom Willard, PhD, and Serge Boutet (of Mondou Ltd. in Quebec, Canada).

Be sure to register for Petfood Workshop 2010 by February 15 so you can save up to 20%! And if you also register for Petfood Forum 2010 (April 12-14), you'll save even more. For more information and to register, go to www.petfoodindustry.com/petfoodforum.aspx.

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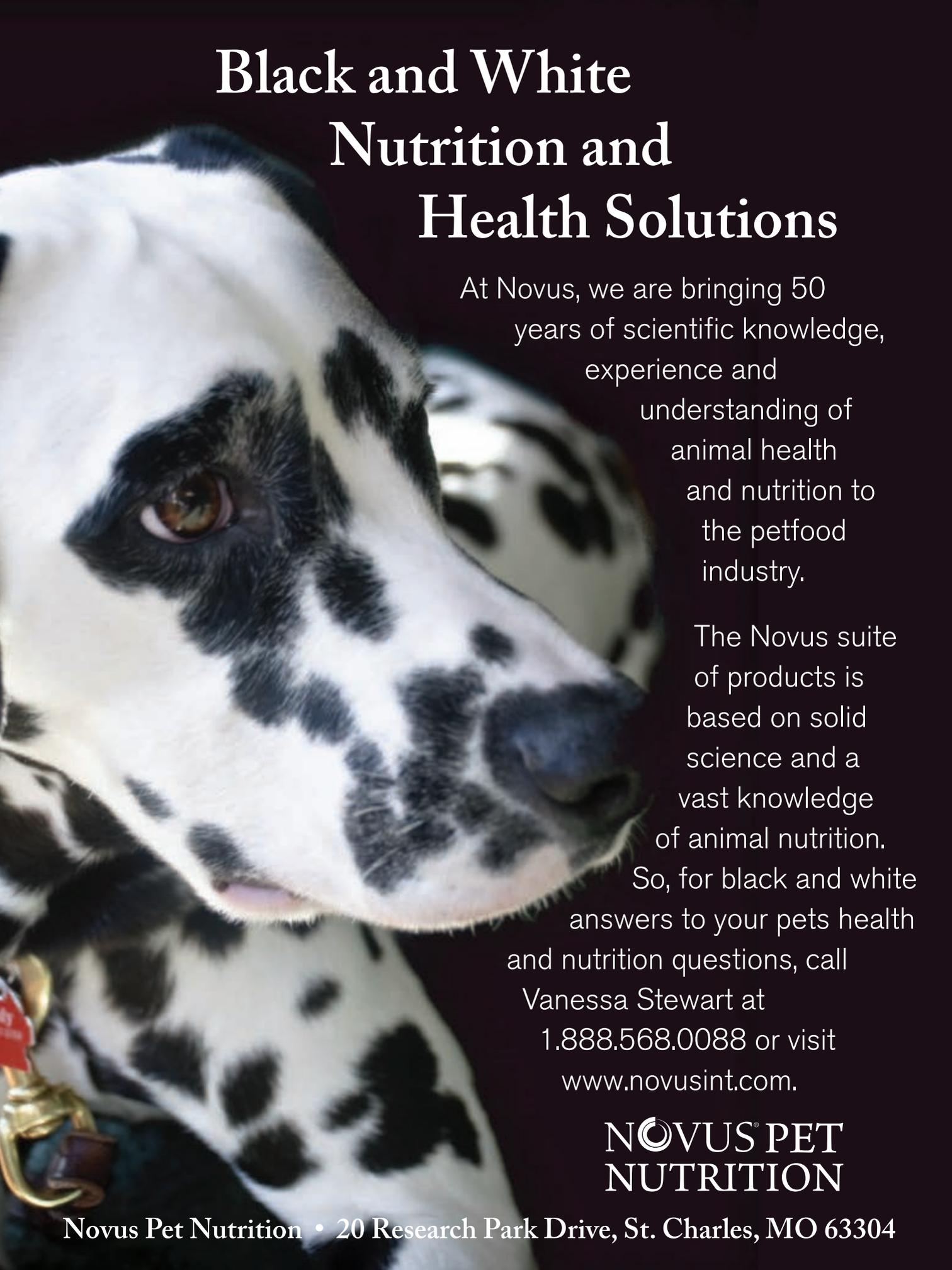
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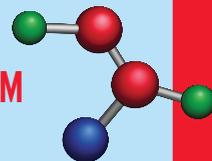
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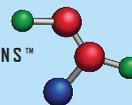
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Novus renovates farm, receives LEED certification

Novus International Inc., an animal health and nutrition company, recently purchased a small farm in Montgomery City outside St. Louis, Missouri, USA, for use as a research facility.

The company embarked on a major renovation that now qualifies the home for the internationally recognized Leadership in Energy and Efficient Design (LEED) for Homes certification.



The LEED-certified Novus research facility in St. Louis, Missouri, USA.

FDA launches pet widget

The US Food and Drug Administration recently launched a pet health and safety widget for consumers as part of an ongoing effort to provide timely public health information.

The widget—a portable application that can be copied onto any other website or blog—will include topics such as how to report a problem with petfood, purchasing pet drugs online and caring for a pet in a disaster. Visit www.fda.gov/AnimalVeterinary/ResourcesforYou/ucm192894.htm.



AFIA embraces use of social media

The American Feed Industry Association (AFIA) now has accounts with Facebook, Twitter and LinkedIn to disseminate news, information about AFIA issues, events, job openings and more.

Links to each of these outlets can be found on AFIA's home page, www.afia.org.



Ireland company expands with exports

Ireland-based Mackle Petfoods announced it is investing £250,000 (US\$406,267) in the extension of warehouse premises and construction of an effluent plant to support new contracts with supermarket retailers in England, which are expected to increase annual turnover by up to £5 million (US\$8.1 million), according to the *Belfast Telegraph*.

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NÜRNBERG  **MESSE**

Zuke's announces support initiatives for retailers

Zuke's, a manufacturer of all-natural pet treats, announced its 2010 retailer support initiatives, many of which are currently in effect.

"We want to support this trend by providing our retail partners with the tools and incentives they need to increase the sell-through of these products in natural and general grocery," said Patrick Meiering, founder of Zuke's.

Support initiatives include in-store sampling programs, store locators on the Zuke's website to push retailer sales and tradeshow specials to support new and existing products.



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PetfoodForum 2010

Executives discuss safety at Petfood Forum 2010

A roundtable of executives from petfood companies, suppliers and industry organizations will hold a strategic-level discussion on petfood safety during Petfood Forum 2010 (April 12-14, Chicago, Illinois, USA). For an updated list of the executives, visit www.petfoodindustry.com/forum2010schedule.aspx.

Also learn from a keynote presentation by world-renowned dog trainer Joel Silverman, host of Animal Planet's Good Dog U, and a market outlook report from David Lummis of Packaged Facts. Find other speakers and topics at www.petfoodindustry.com/forum2010content.aspx.



Petfood Forum

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For Consumers

Dry bison formula

Natural Balance Pet Foods' Limited Ingredient Diets has a dry dog food with bison as the main protein source. The formula is free of grains and contains no corn, soy or wheat, according to the company. The offering is part of the company's grain-free hypoallergenic line.



Natural Balance Pet Foods
Inc.

+1.800.829.4493

www.naturalbalance.net

Hand-rolled dog treats



Cardinal Laboratories offers Pet Botanics Omega Treats for dogs. The hand-rolled snacks look like sushi and are made from all-natural, human-grade ingredients, according to the company. The snacks feature codfish layered with tuna, salmon, duck or chicken, depending on the flavor. Omega Treats also have omega 3 and omega 6 fatty acids.

Cardinal Laboratories

+1.800.433.7387

www.cardinalpet.com

Raw bison dog formula

Nature's Variety offers Raw Bison for dogs as the seventh variety in its frozen raw diet line. The bison diet is formulated with grass-fed, free-range bison and is free of grains and fillers, according to the company. The raw diet is designed for increased control of allergy symptoms, healthy skin and less shedding.

Nature's Variety

+1.888.519.7387

www.naturesvariety.com



Weight management formula

Dogswell's Shape Up is a weight management formula containing L-carnitine, dried kelp, dandelion oil, ginger and turmeric. It is available in both dry food and chicken jerky treats. The chicken and oats recipe is low in fat and calories, according to the company.

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For Consumers

Holistic feline recipe

Holistic Select from WellPet/Eagle Pack Pet Foods offers the canned Holistic Select Chicken Lamb recipe for cats. It features vitamins, minerals, fruits and vegetables. The recipe is designed for healthy, acidic urine and contains lower levels of magnesium, according to the company.



Eagle Pack Pet Foods Inc.

+1.800.225.0904

www.holisticselect.com

Dog digestion supplement

Dog-Wa's herbal supplement is designed to aid digestion, reduce gas and promote fresh breath.



The liquid supplement features vitamins, minerals and antioxidants and is meant to be mixed with water or food.

Dog-Wa

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www.dog-wa.com

Wet dog food



Mars' Pedigree + offers Healthy Skin & Coat wet food for dogs with chicken, rice and omega-3 rich salmon. It features ingredients to promote a soft, shiny coat and healthy skin, according to the company, and is suitable for adult dogs of small, medium and large breeds.

Mars Petcare US Inc.

+1.615.309.1044

www.mars.com



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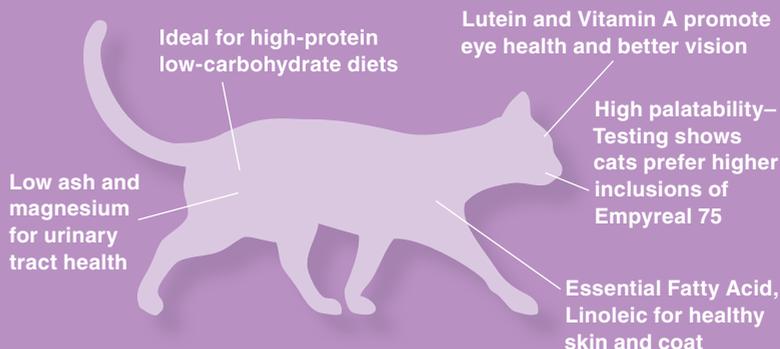
varieties. Formulas include Turkey & Chicken, Red Meat, Herring & Salmon and Weight Management. The treats are designed with high meat and lower carbohydrate levels.

Natura Pet Products Inc.

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For Manufacturers



E. coli, Salmonella test

DuPont Qualicon offers the Bax System *E. coli* O157:H7 MP enrichment media for *Salmonella* testing. The product is validated for use on ground beef, beef trim, spinach and

lettuce, according to the company.

DuPont Qualicon
+1.302.695.5301
www.qualicon.com

Torque device

Plastic Technologies Inc's TorqTraQ device is designed to simplify torque testing on both closures and cappers, while minimizing down-time. The portable TorqTraQ has a metal disk with indentations to facilitate gripping and is approximately 4 inches in diameter. It can measure in pounds of force per inch or newtons per meter.



Plastic Technologies Inc
+1.419.725.5620
www.plastictechnologies.com

Fish oil powder

Pharmachem Laboratories has Pharmomega, a fish oil powder for dry applications in petfood. Standardized to 9% EPA and 6% DHA, Pharmomega is produced through a proprietary process under cGMP standards, according to the company.

Pharmachem Laboratories Inc
+1.201.246.1000
www.pharmachemlabs.com

Lubricant line

Krylon Products Group offers food-grade lubricants for the Tri-Flow and Sprayon product lines. The lubricants meet industry food-grade standards, according to the company. Products in the line include Sprayon Food Grade Silicone Lube, Sprayon Moly Chain and Pin Bushing Lube, Tri-Flow Synthetic Food Grade Grease and Tri-Flow Synthetic Food Grade Oil.

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For Manufacturers



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Drum dumper

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mates the cone against a gasketed connection and discharges bulk material through a slide gate valve. The dumper accommodates drums from 30 to 55 gallons. A pneumatically actuated slide gate valve prevents

material flow until the discharge cone has been properly seated in the gasketed receiving ring.

Flexicon Corp

+1.888.353.9426

www.flexicon.com

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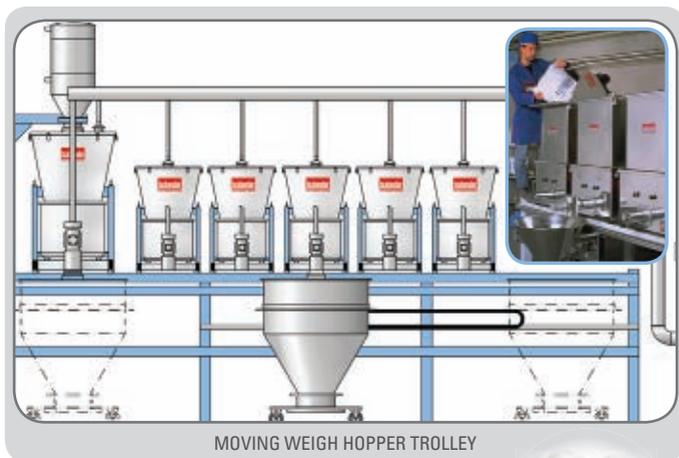
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Check out in-depth cover profiles of the top 10 companies and get to know the brand philosophy behind the globe's most successful petfood lines at www.petfoodindustry.com/Top10extras.aspx.

With bold strategies like new products, flashier packaging and exotic ingredients, it's no wonder the industry keeps growing, paws and claws holding on tight!



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Top 10 global petfood players

By Jessica Taylor

The most successful companies remain industry leaders and continue to reach new heights even in an uncertain economy

SINCE 2007, PETFOOD and pet product sales have continued to rise during one of the bleakest global economic climates in decades. Despite the recession and recalls, worldwide retail sales of dog and cat food reached nearly US\$53 billion in 2008, according to data from Euromonitor International. That's a total growth of 34% from the 2004 amount of US\$38.9 billion.

Although this kind of market expansion is certainly exciting and somewhat unexpected, research firms like Packaged Facts, Mintel and Euromonitor all predict a plateau in growth over the next year, as the world market will either remain in recession or begin to stabilize. In Packaged Facts'

report *U.S. Pet Market Outlook 2009-2010: Surviving and Thriving in Challenging Economic Times*, senior pet market analyst David Lummis says the four areas shaping petfood trends during these uncertain times are humanization, health/wellness, competition and demographics.

Not surprisingly, American and European consumers are monitoring their spending more closely than they have in recent years, yet petfood companies continue an onslaught of new products, flashier packaging and exotic ingredients. With bold strategies like these, it's no wonder the industry manages to thrive, paws and claws holding on tight!

1. Mars Inc.

World headquarters: McLean, Virginia, USA (Mars Petcare: Franklin, Tennessee, USA)

Approximate 2008 global retail sales: US\$13.6 billion

Officers: Luc Mongeau, president, Mars Petcare US; Debra Fair, director of corporate affairs; Kevin Rabinovich, global sustainability director

Top brands: Pedigree, Cesar, Goodlife Recipe, Whiskas, Royal Canin

Websites: www.mars.com

Mars Petcare, both in the US and internationally, seems to be bursting at the seams with growth. Expanding

production in countries like Russia and New Zealand, launching several new lines in India and the US, partnering with institutes and promoting research in England—Mars seems to be showing no signs of slowing down. With more new product releases than any other petfood company in both cat and dog food (see Figure 1), Mars continues to remain a force to be reckoned with.

Pedigree was re-launched in India along with a new range of snacks and treats. The US-based Mars is looking to increase its retail presence in India with hopes of achieving a retail sales value of

US\$1 billion this year from the product.

In June 2009, Pedigree announced the biggest brand re-launch in the product’s history. “Good Honest Food” is a new US\$11.5 million marketing campaign aimed at promoting consumer trust in dog food and focuses on new recipes and improved appearance and nutritional content.

2. Nestlé SA

World headquarters: Vevey, Switzerland (Nestlé Purina PetCare: St. Louis, Missouri, USA)

Approximate 2008 global retail sales: US\$12.8 billion

Officers: W. Patrick McGinnis, CEO, Nestlé Purina PetCare; Terrance Block, president, PetCare North America

Top brands: Purina, Purina One, Alpo, Beneful

Websites: www.nestle.com; www.purina.com

A constant on the top 10 list, Nestlé Purina has continued to pump out new product launches, falling just behind Mars in terms of growth (see Figures 1 and 2, p. 26), and although pets remain the company’s focus, environmental (as well as economic) sustainability has become increasingly important.

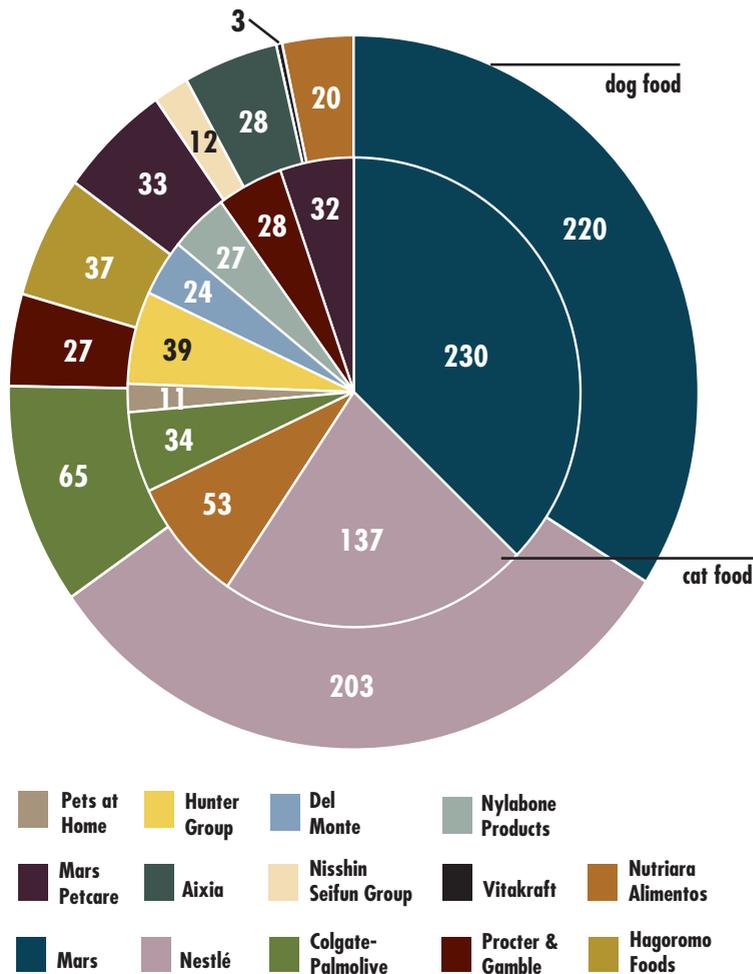
In May 2009, Nestlé Purina PetCare celebrated the installation of a pilot solar energy array on its plant in Denver, Colorado, USA. The new system made the company the first manufacturer to use renewable energy to produce petfood, according to Nestlé Purina.

The new solar array is just the latest effort by the company to increase energy efficiency; it says that between 1998 and 2008, it reduced energy usage at its nine dry petfood plants by about 20% per metric ton of product produced.

While going green in its facilities, Nestlé’s pet products continue to bring in the green as well. Nestlé’s recent sales of pet care products under the Purina

Figure 1: Top 10 in new product launches

The top companies for new global dog and cat food product launches in 2009*. Source: Mintel Global New Products Database (GNPD)



*2009 includes only new products tracked through October 7, 2009

TOP 10 Figure 2: Top 10 in global petfood sales

Approximate global dog and cat food sales in 2008 (in US\$ millions) decide the rankings of our annual top 10 list. Source: Euromonitor International

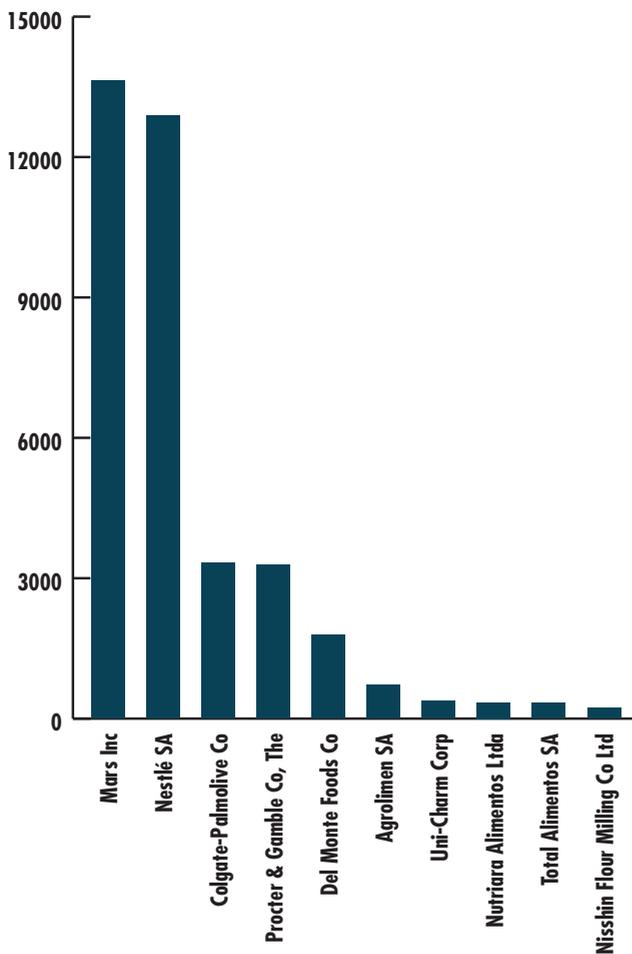
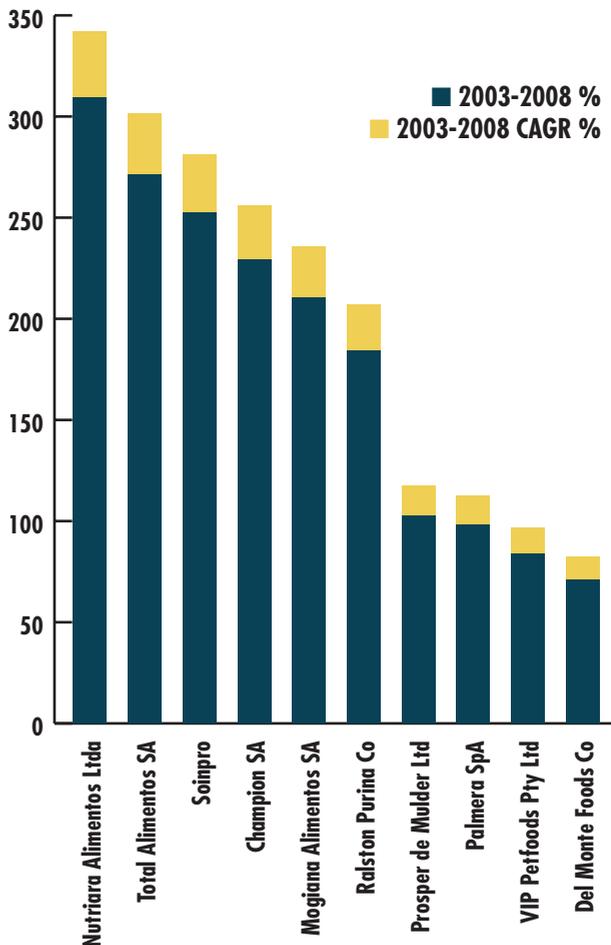


Figure 3: Top 10 global growth leaders

These petfood companies experienced the highest percentage of continued growth (2003 to 2008) and compound annual growth rate (CAGR). Source: Euromonitor International



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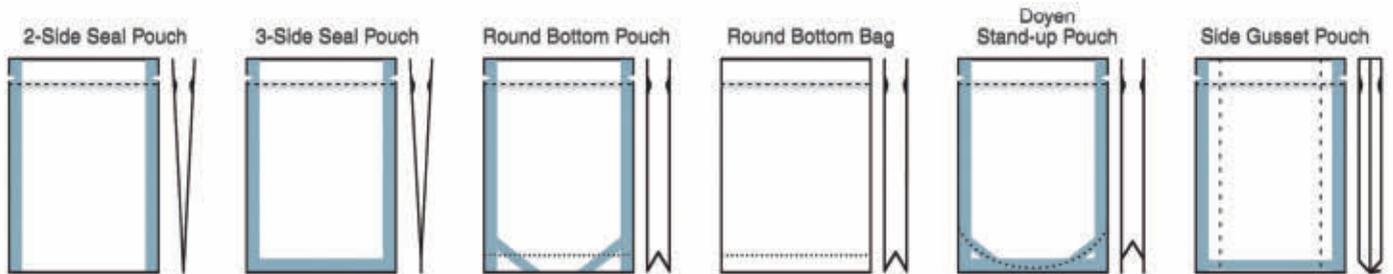
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Making milestones

While all the companies on our top 10 list are breaking new barriers every year, plenty of other petfood players are making a lasting mark, too. Whether it is an anniversary celebrating another successful year in business, a willingness to change with trends or making the manufacturing, packaging and distribution of petfood easier, these companies certainly deserve some extra attention.

- Wenger Manufacturing, leading maker of extrusion, drying and cooling products, celebrates its 75th anniversary in 2010. www.wenger.com
- Established in 1935, Evanger's Dog & Cat Food Company is celebrating its 75th anniversary. www.evangersdogfood.com
- Linn High Therm GmbH, a leading manufacturer of custom industrial scale and laboratory furnaces, recently celebrated its 40th anniversary. www.linn.de
- The LaBudde Group, an ingredient supplier to petfood manufacturers, has been in business for over 100 years. www.labudde.com
- 65 years ago the processing and packaging systems provider Selo was formed by Willem Seffelaar Sr. and Iman Looyen in the Hague, Netherlands. www.selo.com
- The Eukanuba brand of dog food, now made and marketed by P&G Petcare, is celebrating its 40th anniversary. www.eukanuba.com
- For more on these companies, visit www.petfoodindustry.com/Milestones.aspx.

name, according to the most recent quarter's reports, rose at more than double the rate of food and beverage sales for the rest of the parent company. Nestlé

also plans to bring new petfood plants to Russia and Thailand to bolster international profits.

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- **Nutraceuticals and immune function** – David Thomas, PhD
- **Impact of process hardware on petfood safety** – Galen Rokey
- **How to save energy in your processing plant** – Enzhi (Michael) Cheng, PhD, and Will Henry
- **Ensuring freshness in petfood ingredients** – Jim Mann

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For more information, please contact Kathy Syversen at ksyversen@niu.edu or Tel. +1.815.753.7922.

Petfood Forum Asia 2010 is held in conjunction with Victam Asia 2010. Registration to Victam Asia is free if made online at www.victam.com prior to March 3, 2010. For information on hotels and travel packages, please visit www.victam.com.



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TOP 10 **Figure 4: Market size according to retail value**

The market, although still strong, is starting to slow down as the economy catches up (in US\$ millions).

	2004	2008	2009	2004-09 %	2004-09 CAGR %	2004-09 Absolute
World						
Dog and cat food	38959.1	52957.8	52197.9	34	6	13238.9

Figure 5: Market size according to retail volume

The small increase of volume in tons of petfood in 2009 reflects the market's changes (volume in metric tons).

	2004	2008	2009	2004-09%	2004-09 CAGR %	2004-09 Absolute
World						
Dog and cat food	18415676.6	19646256.7	19727469.8	7.1	1.4	1311793.2

Sources: ©2009 Euromonitor International

3. Colgate-Palmolive

World headquarters: New York, New York, USA (Hill's Pet Nutrition: Topeka, Kansas, USA)

Approximate 2008 global retail

sales: US\$3.3 billion

Officers: Neil Thompson, Hill's Pet Nutrition president and CEO; Janet Donlin, chief, Veterinary Business Channel

Top brands: Hill's Science Diet, Hill's Prescription Diet

Websites: www.colgate.com; www.hillspet.com

Hill's Pet Nutrition barely held on to its spot above P&G Pet Care in total global retail sales, according to

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Euromonitor, with US\$3.3 billion (see Figure 2, p. 26). In 2009, Neil Thompson, who took the position of president and CEO of Hill's Pet Nutrition after Robert Wheeler retired, was elected secretary of the Pet Food Institute, further solidifying the company's innovation and staying power in the industry in the US.

Last year Hill's announced scholarship programs for veterinarians, dental contest and nutrition challenge winners and partnered with the American Veterinary Medical Association to prevent and curb pet obesity. Staying in touch with consumers also remains high on Hill's list of important and ongoing goals. Earlier in 2009, the company announced a Culinary Creations Creative Presentation and Sweepstakes contest, inviting US residents to submit their ideas for new petfoods.

4. Procter & Gamble

World headquarters: Cincinnati, Ohio, USA (P&G Pet Care: Dayton, Ohio, USA)

Approximate 2008 global retail sales: US\$3.27 billion

Officers: Robert McDonald, CEO; A.G. Lafley, chairman

Top brands: Eukanuba, Iams

Websites: www.pg.com; www.eukanuba.com, www.iams.com

P&G Pet Care managed a modest amount of growth, with US\$3.27 billion in retail sales in 2008 and a strong showing in new product launches in cat food (Figure 1, p. 25) but falling behind relatively newer and smaller pups like Nutriara Alimentos, Pets at Home and Nylabone in new dog food SKUs.

Iams Eukanuba's entries in the new petfood segment include Eukanuba Naturally Wild dog foods and the inclu-

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To read more about petfood players celebrating milestones this year, go to www.petfoodindustry.com/Milestones.aspx.

sion of prebiotics in all of its improved formulations. P&G Pet Care has introduced prebiotic petfood formulas in both its Iams and Eukanuba brands to help maintain pets' gastrointestinal health. Featuring the prebiotic FOS (fructooligosaccharides), these new formulas stimulate the balance of gut microflora, which in turn promotes a stronger immune system to help fight disease, according to P&G.

5. Del Monte Foods

World headquarters: San Francisco, California, USA

Approximate 2008 global retail sales: US\$1.78 billion

Officers: Richard G. Wolford, chairman, president and CEO; Jeff Watters, Del Monte Pet Products senior VP

Top brands: Meow Mix, Kibbles n' Bits, Milk-Bone, Snausages, Nature's Recipe (Cat and Dog)

Website: www.delmonte.com

Del Monte, holding strong in the fifth position with a healthy increase and US\$1.78 billion in sales, has remained resilient and innovative, developing the newest product in its Snausages line, Breakfast Bites, using input from a social network of dog owners it formed. Del Monte developed its new product in just six weeks with the guidance of the exclusively formed group of pet consumers.

In September 2009, the company reported first-quarter sales jumped more than 20% to US\$412.3 million, from US\$342.7 million in 2008. In response to generally strong industry performance, analysts point to stable pet product



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consumer habits to explain the strong stock performances.

Del Monte also managed 24 new SKUs in the dog food category with the help of product launches from Snausages, Milk-Bone and Nature's Recipe (see Figure 1, p. 25). Del Monte was also the only US-based company on our list that rated among the highest in growth, with a 71% increase from 2003-2008 (see Figure 3, p. 26).

6. Agrolimen SA

World headquarters: Sant Cugat del Vallés, Spain (main plants/facilities: El Monjos, Spain; La Chapelle Vendôme and Moulins, France)

Approximate 2008 global retail sales: US\$0.72 billion

Officers: Mario Franques, markets managing director; Franc Andreu, operations managing director

Top brands: Affinity, Ultima, Brekkies, Brekkies Excel, Advance Veterinary Diets

Website: www.affinity-petcare.com

Affinity says it is committed to the following values: imagination, innovation, flexibility and a scientific, systematic approach. Besides expanding distribution in Europe, Affinity's growth strategy is based on new product development and strong promotion efforts, according to markets managing director Mario Franques.

"We have introduced nine new varieties for cats and four for dogs in different European countries in the last 12 months," he said in a 2008 *Petfood Industry* interview. "Our keys to growth are that we have new and innovative products, and we are focusing our efforts in geographical areas in Europe where dry products are growing the most."

The company is already the leader in Spain in total market and dry petfood with shares above 40% and is making considerable gains in countries like France, Germany and Italy.

7. Uni-Charm Corp

World headquarters: Tokyo, Japan

Approximate 2008 global retail sales: US\$0.37 billion

Officers: Toshio Takahara, chairman; Gumpei Futagami, president/CEO

Top brands: Aiken Genki, Neko Genki, Gaines

Websites: www.unicharm.co.jp; www.uc-petcare.co.jp

Unicharm shares climbed 17% in the last six months of 2009 and were trading at 5.2 times book value during that period. Unicharm Petcare has said it plans to focus on selling food for dogs and cats aged 13 years and older, an extremely well-thought out and deliberate marketing move, according to Kazuaki Hashiguchi of Ichiyoshi Research Institute.

"The company is adapting well to the changing needs of pet owners, with products for aging or obese pets," said Hashiguchi. "It's focusing on strengthening certain areas that are in demand, maximizing the profitability."

8. Nutriara Alimentos Ltda.

World headquarters: Arapongas, Paraná State, Brazil

Approximate 2008 global retail sales: US\$0.34 billion

Top brands: Foster, Freddy's, Bybos, Dog Show, Blog Dog

Website: www.nutriara.com.br

Nutriara Alimentos Ltda. remains in the eighth spot on our list, capitalizing on the booming Brazilian petfood market. In Brazil, consumption of prepared petfoods surpassed 40% in 2008, Euromonitor says, an increase of nearly 20 percentage points from 1998. Nutriara topped the list in overall growth from 2003-2008 (Figure 3).

With an almost overwhelming range of products for both cats and dogs, Nutriara continues to strive to offer pet products for animals of all ages, sizes

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and special health needs. Many products are bestsellers, thanks to their quality and acceptance, and can be found in every region of Brazil. The company was on both the cat and dog food new product launch top 10 lists, according to Mintel (Figure 1, p. 25). The company has also recently incorporated the pet units from Cargil Foods.

9. Total Alimentos SA

World headquarters: Três Corações, Brazil

Approximate 2008 global retail sales: US\$0.32 billion

Officers: Antônio Teixeira Miranda Neto, president; Paulo Tavares, financial director; Anderson Duarte, technical director

Top brands: Família Max, Big Boss, Lider, K&S, Equilibrio

Website: www.totalalimentos.com.br

Total Alimentos has ranked as the

ninth largest petfood company in the world the past three years, having experienced the second fastest rate of growth from 2003-2008 (Figure 3, p. 26). That growth has shown no signs of slowing down, as Total and Nutriara battle it out over the booming Brazilian market. Besides being one of the largest petfood producers selling to the Brazil market, Total exports to 33 countries.

To keep quality and service high, Total maintains a large sales force selling directly to 12,500 pet store and other retail accounts. As the company has expanded globally, it has opened sales branches in China, US and Europe. Today, petfood comprises 70% of the company's sales. Company president Miranda estimates the Total portfolio encompasses 125 product lines or about 850 stock keeping units (SKUs).

10. Nisshin Seifun Group

World headquarters: Tokyo, Japan

Approximate 2008 global retail sales: US\$0.23 billion

Officers: Osamu Shoda, chairman; Hiroshi Hasegawa, president

Top brands: Run, Carat, Lovely

Website: www.nisshin.com

Nisshin Petfood Inc. has rounded out the top 10 companies since 2007, according to Euromonitor data. The company provides a pet advice and consultation service, website and various other forms of communication to continuously gather up-to-the-minute feedback from pet owners concerning their problems and needs. According to Figure 1, Nisshin introduced 12 new cat food product SKUs this past year, many of which are targeting elderly and aging pets. ■

AFIA's PET FOOD COMMITTEE IS PROUD TO SPONSOR THE 3RD ANNUAL

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LOCATION: GEORGIA WORLD CONGRESS CENTER (B301-306), ATLANTA, GA.

The conference will feature presentations on the following:

- A Global Perspective on the Pet Food Market
- A Look at International Ingredient Purchasing & Supply
- International Regulatory Update
- AFIA's Salmonella Control Guidance Document
- FDA's Current Regulatory View of Salmonella Control in Pet Food, Ingredients and Feed
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IN THE FAST-GROWING ASIA-PACIFIC

PETFOOD market, information and knowledge lead to business growth. Petfood manufacturers can gain all by attending Petfood Forum Asia, where leading industry experts will share their insights on important topics such as nutrition, safety and market trends.

Scheduled for March 3, 2010, at the Queen Sirikit National Convention Center in Bangkok, Thailand, Petfood Forum Asia will be held in conjunction with Victam Asia 2010, one of the largest agrifood events in the world.

In addition to learning about the industry during the Petfood Forum Asia sessions, you'll enjoy plenty of networking with new and familiar colleagues. You can also visit exhibits of ingredients, equipment and other supplies vital to the petfood industry and meet with key suppliers' representatives.

Following is the latest scheduling, topic and speaker information available at press time. For updated information, visit www.petfoodindustry.com/PFFAsia2010content.aspx. ■

Schedule of events

9:00-10:00 Registration and breakfast

10:00-10:40 Market and new product trends driving growth: A leading research firm presents data and trends explaining what's behind petfood growth in Asia-Pacific and globally, and offers projections for the industry's future.



10:40-11:20 Fermentable carbohydrates in feline diets: George C. Fahey Jr., PhD, professor of animal and nutritional sciences with the Department of Animal Sciences at the University of Illinois, presents his research on fiber as an important ingredient for feline health.



11:20-12:00 Impact of process hardware on petfood safety: Galen Rokey, process manager of the Petfood Applications Group for Wenger Manufacturing, explains how petfood

safety can be directly impacted by key hardware components in the extrusion process, with an emphasis on controlling *Salmonella*.

12:00-13:30 International Lunch Buffet, Retro Live Cafe



13:30-14:10 All-breed versus breed-specific diets for dogs: Anton C. Beynen, PhD, head of R&D for Vobra Special Pet Foods, the Netherlands, and professor of animal nutrition at Rajamangala University of Technology in Thailand and King Saud University in Saudi Arabia, discusses his research into whether breed-specific diets make sense for dogs.



14:10-14:50 Ensuring freshness: managing biogenic amines in petfood ingredients: Jim Mann, technical service manager for Kemin Nutrition, introduces measures that can reduce the risk of bacterial degradation and biogenic amine formation in petfoods.

14:50-15:30 Coffee break



15:30-16:10 Critical processing issues in today's production environment: Enzhi (Michael) Cheng, PhD, technical sales engineer/director of sales, Asia, for Extru-Tech Inc (ETI), and Will Henry, technical sales engineer/research & development for ETI, cover important topics that can help you save money on your factory floor.



16:10-16:50 Effect of nutraceutical ingredients on the immune function of cats: David Thomas, PhD, director of the Centre for Feline Nutrition and senior lecturer with the Institute of Food, Nutrition and Human Health at Massey University in New Zealand, has developed a simple protocol to evaluate the immune-enhancing effects of adding supplements to commercial cat foods.

Petfood growth in Asia still strong

Despite the worldwide recession, the petfood industry is still growing—though Euromonitor International says the growth rate has slowed dramatically from the huge

increases of recent years.

But the Asia-Pacific market is one in which growth will stay healthy: Sales of dog and cat food will increase more

than 17% from now through 2014, reaching US\$5.98 billion, according to Euromonitor, down just slightly from the 18.6% growth the Asia market has

Table 1. Asia Pacific cat and dog food sales and growth

Euromonitor says growth rates in most Asia-Pacific countries will decline over the next five years but will still be in the double digits.

Country	Sales in US\$ millions			% total growth		% CAGR	
	2004	2009	2014*	2004-09	2009-14*	2004-09	2009-14*
China	\$171	\$305	\$407	78.2	33.4	12.2	5.9
Hong Kong	\$48	\$60	\$74	25.1	23.2	4.6	4.3
Japan	\$3,490	\$3,803	\$4,285	9.0	12.7	1.7	2.4
Malaysia	\$47	\$71	\$87	52.8	21.9	8.9	4.0
Singapore	\$30	\$46	\$51	53.5	11.5	8.9	2.2
Taiwan	\$158	\$219	\$257	38.8	17.5	6.8	3.3
Thailand	\$121	\$282	\$409	133.4	45.0	18.5	7.7
Total Asia-Pacific	\$4,300	\$5,101	\$5,980	18.6	17.2	3.5	3.2

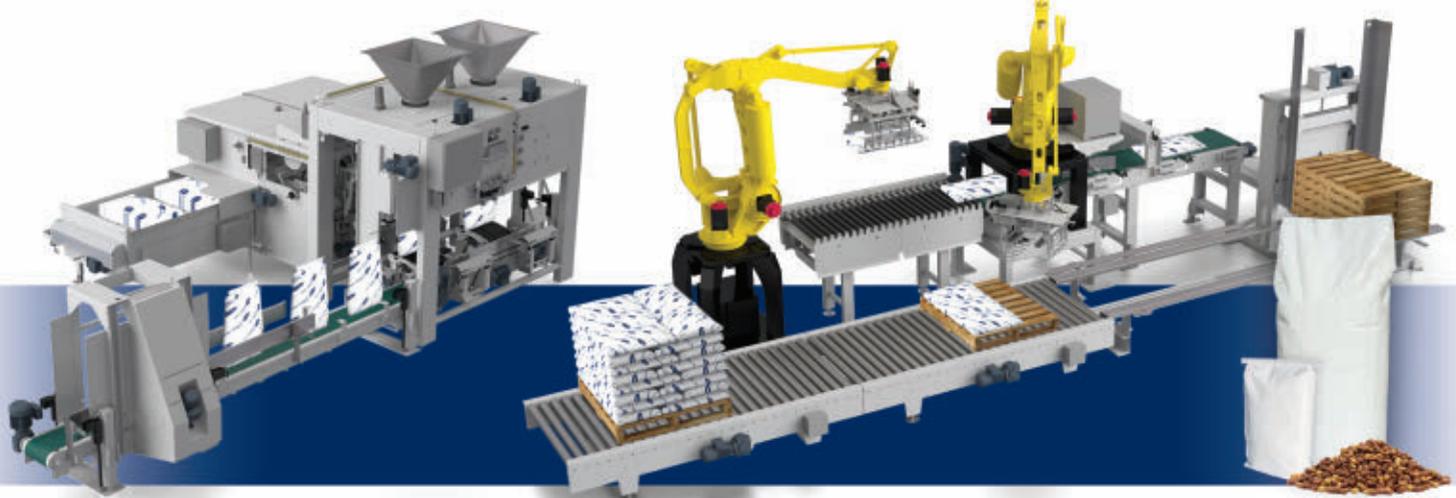
* Projections from Euromonitor International. CAGR = compound annual growth

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enjoyed from 2004-2009. (see Table 1, p. 39). As of November 2009, the region's cat and dog food sales totaled US\$5.1 billion.

Breaking down the data by country, Euromonitor says all the main Asia-Pacific markets will enjoy double-digit growth in cat and dog food

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sales from 2009-2014. As dynamic as those rates are, nearly all are lower than over the past five years; and most of the growth is happening

on very small bases.

For example, China's cat and dog foods sales rose 78% from 2004-2009 but still only amounted to US\$305 million for the last year. Euromonitor predicts the growth rate will decline to 33% from now through 2014, with sales reaching US\$407 million that year. (For more on this petfood market, see "What are Chinese pet owners buying?" on p. 42.)

But there's good news for the host country for Petfood Forum Asia: Thailand's cat and dog food sales will increase 45% over the next five years, according to Euromonitor, reaching a total of US\$409 million in 2014. The Thai cat and dog food market had grown 133% from 2004-2009.

And while developed, mature petfood markets elsewhere in the world will see

Online extra!

To see how the rest of the global petfood market compares to the Asia-Pacific region, find more data from Euromonitor at www.petfoodindustry.com/stillgrowing0912.aspx.

much lower growth—and in some cases, even declines—Japan's sales will rise 12.7% from now through 2014, Euromonitor projects, up from 9% over the past five years. That growth will lead to a total of US\$4.285 billion in 2014.

Euromonitor also projects volume (in metric tons) of dog and cat food sold in Asia-Pacific will grow by nearly the same amount (15.5%) as will sales.

All the data points to a steadily growing petfood market for this part of the world.

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Brady Carter

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Half of the pet owners in Chinese urban areas buy petfood from retail outlets.

More Chinese pet owners are buying commercial petfood, especially those in urban areas, and basing their purchase decisions on price, package size and product reputation.



What are Chinese pet owners buying?

By Coco Liu

Petfoods with low prices, larger packages and good reputation are popular in China

ZHAO NAN, a 23-year-old clerk from Xi'an, China, who favors Samoyed, lost two dogs last year, one because broken chicken bones in homemade petfood pierced its guts. To avoid further accidents, Zhao says he decided to buy prepared petfood for his third Samoyed.

Like Zhao, more pet owners in China have started purchasing commercial petfood rather than cooking for their pets at home as they become more concerned about their pets' health and seek convenience (see Figure 1). Half of the pet owners in Chinese urban areas buy petfood from retail outlets, and the number is even higher in major cities such as Chengdu, Beijing and Guangzhou.

But this does not mean Chinese pet

owners will pick up whatever they find on the shelf. As interviews with several demonstrate, many have established their petfood purchasing standards according to price, package size and product reputation.

ALTHOUGH CHINESE PETS are starting their love affair with commercial petfood, most can only enjoy inexpensive products worth about 10 yuan (US\$1.46) per kilogram. Price sensitivity is a major reason Chinese pet owners stay away from high-end petfoods and pet snacks.

"Price always comes first," says Lin Shujie, 25, a journalist from Southeast China's Xiamen. "Of course I would like to buy the cheapest one as long as it does not make my cat sick."

Lin buys two packages of Whiskas—the only cat food brand available in Xiamen—each month for her 5-year-old cat. Since the retail price increased from 29 yuan (US\$4.25) per 1.5 kilo to 37.5 yuan (\$5.49) per 1.4 kilo this year, Lin started complaining about her “picky” cat. “If my cat showed interest in homemade food, I would not buy commercial petfood.”

Several other pet owners say they also care about petfood prices. As a result, they usually mix premium products—Royal Canin, for example—with value-priced brands to provide enough nutrition at a lower cost.

Wei Chunlong, analyst at Shenzhen’s Globrand, says over 60% of Chinese petfood buyers can only afford low-end products, and price concerns prevent most rural pet owners from

buying commercial petfood.

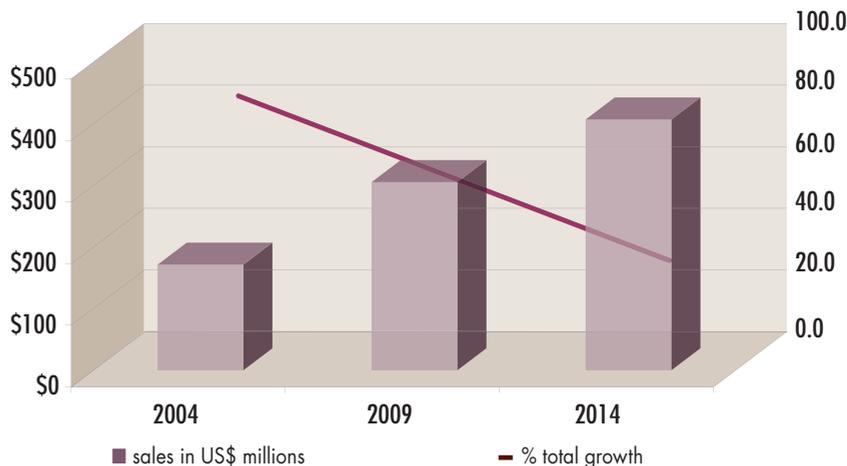
BECAUSE OF COST and convenience, large packages of petfood—10 to 20

kilos—are moving to the top of pet owners’ shopping lists, Wei says.

Quan Tian, 24, an advertising agent from Chongqing, says she buys

Figure 1. Sales of cat and dog food in China

Though still totaling less than US\$500 million a year, petfood sales in China have grown 78% over the past five years and will grow another 33% over the next five, according to Euromonitor.



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16-kilogram packages of the Health Food brand from Life's Abundance for her Miniature Schnauzer. "I prefer to buy a large package because it is cheaper. Also, I can share it with other pet owners to lower my spending."

Larger packages are also favored

by busy working pet owners. "I travel a lot and do not have time to buy food for my three cats frequently," says Guo Cheng, a photographer from Hainan province. "Thanks to large packages, I only need to go shopping once every two weeks. So, for me, bigger is better."

Price sensitivity is a major reason keeping Chinese pet owners away from high-end petfoods.

Although larger packages of petfoods are sold in supermarkets and pet markets, many people say they prefer to buy directly from petfood company websites to avoid counterfeit products. Also, online stores usually offer delivery services, so buyers don't have to carry heavy goods home.

REPUTATION PLAYS A key role in the foods Chinese pet owners seek for their pets. Petfood from well-known companies and with nice packaging can attract new buyers, but experienced pet owners pay more attention to product quality and users' reviews.

Huang Guoping, 49, who works at a Chongqing energy company, says she considers petfood made by well-known companies reliable products.

"When I first got my dog, I had no idea how to choose petfood. So I started with a brand from Nestle. Because I think if humans can drink Nestle's milk, it should be fine for my dog to eat Nestle's petfood," Huang says.

Huang Ying, a writer in her late 20s from Shanghai, says before buying, she likes to fully understand quality. "Ingredients are a key factor," she says. "I have never bought domestic brands because they are not natural."

Huang says she also reads magazines and Goumin.com—a popular site for Chinese dog owners—for reviews from previous buyers. "I recently shifted to Orijen because it was recommended as 'six star' dog food." ■

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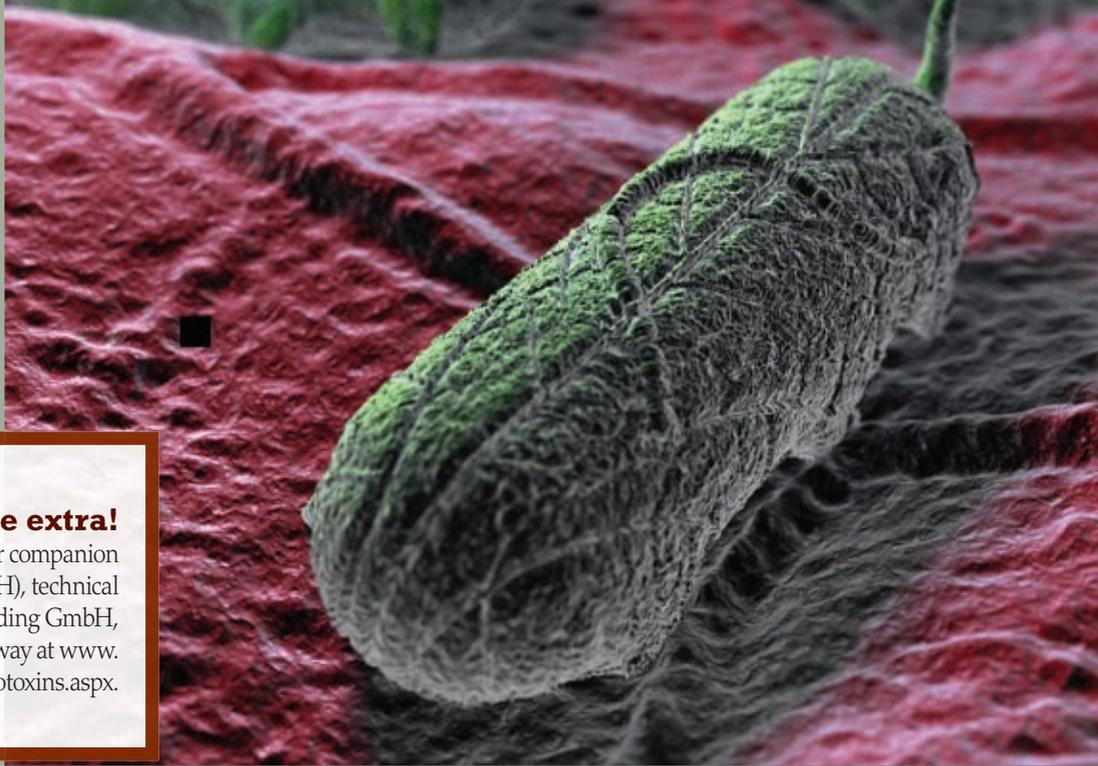
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Online extra!

Do mycotoxins pose a risk for companion animals? Karin Griessler DI (FH), technical manager of Biomin Holding GmbH, investigates the natural way at www.petfoodindustry.com/Mycotoxins.aspx.



Under the microscope: *Salmonella* control

By Kendra M. Waldbusser

Biomapping may be the future to aid manufacturers in suppressing and controlling bacterial contamination

WHETHER YOU ARE an ingredient supplier or a finished petfood manufacturer, evaluating each and every stop along your process, especially in the form of a biomap, is key in eliminating *Salmonella*. *Salmonella* is often considered an indicator organism for post-lethality contamination in pet

products, but I would encourage you to look at all of your processes and not just the steps after lethality.

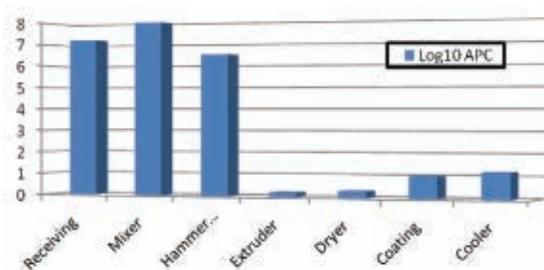
MANY PROCESSORS RECEIVE raw materials off of certificates of analysis (COAs) that most likely indicate the material has been tested and found

to be *Salmonella* negative. The certificates typically do not inform processors on the methodology used for analysis, the number of samples taken or where in the process the samples were taken. All these variables will affect whether that COA is representative of the material you are bringing into your plant. The transport mode/vehicle might also affect the product (e.g., the product may have been shipped in bulk and come in contact with the shipping vehicle, which may have *Salmonella* present on it prior to loading).

COAs have their place but do not replace your being an educated buyer/receiver of ingredients. Know your suppliers. Visit their plants, ask questions and understand their process. You should see and understand how your ingredients are handled as they are transported to your plant. You should

Figure 1. Biomap of micro load by location

An example of an aerobic plate count (APC) biomap in a mock plant, helping track the location of each load and narrowing down where *Salmonella* contamination may occur.





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SEVERAL FACTORS INFLUENCE the growth and proliferation of *Salmonella*

(time, temperature, nutrient availability, pH, water activity (Aw) and other microbial interactions) in your processing environment. The more of these components you can make inhospitable to *Salmonella* throughout your process, the less prolif-

eration of *Salmonella* you will have.

The goal is to reduce the amount of *Salmonella* at multiple steps in your process (often termed a multiple hurdle approach) so you have as few as possible viable cells going into your kill step.

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MOST PROCESSORS TRUST their kill step to eliminate *Salmonella* entirely, but it is important to know what log reduction you get through your kill step. For example, if you are getting a 4 log reduction through your lethality step, any raw materials that contain over 10,000 cfu/gm of *Salmonella* will likely produce a finished petfood product with viable cells of *Salmonella*.

Comprehensive studies should be done on your lethality step that provide an accurate expected reduction. By looking at all of your incoming materials and your formulations, you should be able to calculate the odds of having viable *Salmonella* survive your kill step.

PROTECTING THE PRODUCT prior to packaging and distribution is also key. Assuming you have validated your lethality step and you are confident that your finished material is *Salmonella* negative, your ultimate goal now is to not contaminate the product.

Although *Salmonella* is not generally known as an aggressive environmental contaminant, it can be if given the right conditions. Environmental swabs can be tested for the presence of *Salmonella*, and the results will help you determine your risk for post-lethality contamination.

An environmental sampling plan might include swabbing non-product contact items such as drains, air handling units, on/off switches and air hoses; just as the name "non-contact" indicates, these areas do not come in contact with the product. A positive result most likely does not implicate

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- **Prebiotic and probiotic supplements in petfood: impact on immunity**—Sara Cutler, Kemin Nutrisurance
- **Sustainability as a business—and survival—strategy**—Jan Hoijtink, consultant
- **Convenience trends in petfood packaging**—Alexander Mikolasek, Mondi Packaging
- **Making private label super premium petfoods competitive**—Serge Boutet, Mondou Ltd.
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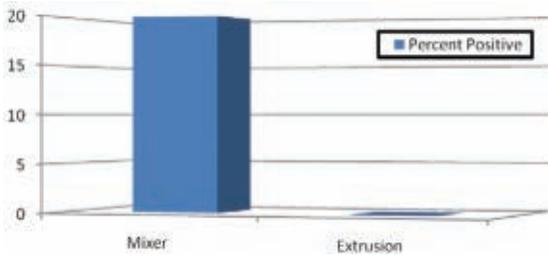
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Figure 2.
Salmonella incidence by location

An example of a positive validation through a lethality step in a mock *Salmonella* searching scenario.



product but will tell you if you have *Salmonella* present in your post-lethality processing area.

WHEN REVIEWING SALMONELLA results, always remember pathogen testing such as *Salmonella* is done after enrichment.

In layman's terms, this means the laboratory has taken your sample and assumed that if *Salmonella* is present, it would need to be resuscitated. This means the lab staff put the sample in media with optimum growth conditions (food, water, pH, temperature) for *Salmonella* to revive and replicate.

IT IS CRITICAL to determine your micro loads at each step in the process. You can do this with a biomap of your facility. Take samples at various locations throughout the process and analyze them for the amount of bacteria present.

If you expect your *Salmonella* incidence to be quite low or you would rather not test for *Salmonella* due to the expense, another indicator test or organism may work better, such as aerobic plate count (APC) testing or possibly *E. coli* or coliforms. When you sequentially plot the results of your biomap on a chart, you may discover hot spots and processes that decrease your micro load (see Figure 1, p. 46).

If any process is considered a control step, you may want to validate the reduction using the same methodology (test the load prior and after the intervention as in Figure 2). I encourage you to perform a biomap. The results should help you determine multiple places for control measures for *Salmonella*. ■

Kendra M. Waldbusser is Director of Quality Assurance for Tyson Foods' Renewable Products Division. Contact her at kendra.waldbusser@tyson.com.

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Color my world



FDA proposes new color additive regulations.

IN NOVEMBER 2009, the US Food and Drug Administration (FDA) published a proposal regarding the declaration of color additives in animal feed (including petfood) labels. The proposed amendment to Title 21 Code of Federal Regulations Section 501.22 (Federal Register, Vol. 74, No. 224, pp. 61068-61074) would add a subsection (k) to incorporate these labeling changes as mandated by the Nutrition Labeling and Education Act of 1990 (NLEA).

In response to NLEA, an amendment was incorporated into the human food labeling regulations [21 CFR 101.22(k)] in the mid-1990s. Although I recall from my service at FDA that a similar regulation for animal feed and petfood labels was also drafted around the same time, it was not proposed until now.

BOTH CERTIFIED AND non-certified food colors must be approved by FDA before use in food or feed and then only as specified in the resulting regulation. Certified food colors have the additional requirement of batch certification, wherein samples of each production batch must be tested for compliance with codified specifications.

Certified color additives are identified by a color and number (e.g., "FD&C Red No. 40," "FD&C Blue No. 1 Lake"). Those intended for use in food or feed would be preceded by an "F" (i.e., "FD&C" vs. "D&C," the latter indicating approval only for drug and cosmetic use).

The new regulation 21 CFR 501.22(k)(1) would require that all certified food color additives be declared by their names as specified in their respective regulations—they cannot

continue to be declared generically as "artificial color" or like terms. However, for purposes of label declaration, "FD&C" and "No." may be omitted from the name. The name "Lake" must be used if applicable, though. For example, the additives mentioned above could be declared as "Red 40" and "Blue 1 Lake."

UNDER THE NEW 21 CFR 501.22(k)(2), food colors that are exempt from certification may continue to be declared as "artificial color," "artificial color added," "color added" or equivalent terms without further elaboration as to the particular color additive used. However, there are several reasons why a petfood manufacturer may choose not to follow that option.

For one, the names of many non-certified color additives in petfoods—caramel, iron oxide—are apt to be more appealing to the consumer than the words "artificial color." Also, a non-specific declaration may prompt inquiries both from consumers seeking more information and from regulators needing confirmation of compliance with the certified colors provisions.

When the actual name of a non-certified food color is used in the ingredient list, the

How to comment

You can read the complete Federal Register Notice, "Animal Food Labeling: Declaration of Certifiable Color Additives," at <http://edocket.access.gpo.gov/2009/pdf/E9-27984.pdf>. Direct questions to Dr John Machado at +1.240.453.6854 or john.machado@fda.hhs.gov. Electronic or written comments are due February 22, 2010. Note that electronic comments must be submitted via <http://www.regulations.gov>, not directly to FDA. Reference Docket No. FDA-2009-N-0025 or RIN 0910-AG02 in your comments.

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new regulations would still require it to be clearly identified as a color additive. It is not uncommon practice today for some colors to be declared without this indication, but the new regulations would clarify that practice is not permitted. So, for example, the food color "caramel" would have to be declared as "caramel color" or "colored with caramel."

WHETHER OR NOT they know it, many petfood manufacturers are already compliant with these new regulations. As I recall, FDA had provided informal education to manufacturers in the 1990s in anticipation of the impending changes under NLEA. This must

Both certified and non-certified food colors must be approved by FDA before use in food or feed.

have helped, since FDA notes that an informal 2007 survey of 68 petfood and specialty petfood labels found only 13 to be questionably compliant and only one definitely out of compliance with the proposed rule.

For those products not currently in compliance with the proposed rule, FDA proposes the effectiveness date to be two years from the date of publication of the final rule. FDA does not view any necessary changes as constituting major label redesign but wants to allow for an adequate transition period to deplete existing label inventories.

Interested parties, including petfood manufacturers, may make comments on this proposal for

consideration in the final rule (see "How to comment"). Because the amendment is mandatory under NLEA, there is likely little argument that can be made to dissuade FDA from proceeding with a final rule much different from the current wording.

On the human food side, FDA recently inserted some clarifying verbiage to 21 CFR 101.22(k)(2) that is not present in the animal feed proposal. It would be prudent to include similar clarifying language to the animal feed amendment before it is finalized. ■

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Call to action 2010



5 small steps would streamline information on petfood ingredients to help communicate with pet owners.

CUSTOMARILY THIS COLUMN deals with specific issues pertaining to a single ingredient. Things like ingredient origin, impact from processing, nutritional value and ingredient misperceptions are unpacked and rewrapped in context. Seldom has this been a forum for broader petfood ingredient discussions. Maybe as we turn the corner on a new year, it is a good opportunity to add a new wrinkle.

So, rather than making a new year's resolution, the following action list is proposed. The purpose is to identify a few small steps that would streamline information exchange about ingredients used to produce petfoods and offer more clarity to communicate with the pet owner/consumer. The list could be long, but these five are proposed as a place to start.

1. INGREDIENT SUPPLIERS: PROVIDE a complete nutrient breakdown of your ingredients. Petfood companies are obligated to meet the requirements of more than 40 nutrients for the foods they sell. This information doesn't just fall out of the sky. The company must either perform the analysis themselves at several thousand dollars per nutrient or rely on reputable nutrient resource datasets when assessing whether the ingredient will work in a particular product.

To their credit, a number of responsible ingredient suppliers routinely supply this detailed information, but too many do not. Some presume, incorrectly, that this is the sole responsibility of the petfood company or that accurate data is available in reference tables. However, the supplier is the expert on their particular

ingredient(s) and needs to supply this information. That includes full nutrient analysis of premixes, too!

2. PREMIX AND FLAVOR suppliers: voluntarily provide your customers with the full list of ingredients and their inclusion levels. Getting this information shouldn't require a nondisclosure agreement. Without exception, none of the ingredients used in these mixes is exempt. So, if the petfood company has to include it to comply with the prevailing regulations—then so should you.

Further, when assembling ingredient listings in order of predominance, the micronutrients or additives are often sorted down to the fourth and fifth decimal place. Without a detailed composition (to two or more decimal places) it is impossible, outside of guessing, to properly align these minor ingredients on the label.

3. STATE FEED CONTROL officials and Food and Drug Administration: mandate the use of parentheses for vitamin and trace mineral premixes on ingredient lists and discard the term "byproduct" from the lexicon.

To construct an all-inclusive list of ingredients in order of predominance, the individual vitamins and trace minerals often get interspersed with non-nutritive additives and other micro-ingredients. This causes confusion for consumers to the point that some call customer service departments asking for the removal of key nutrients (e.g., menadione sodium bisulfite complex, ethylenediamine dihydriodide) because they don't recognize these chemical names as vitamins or minerals. The use of parentheses is consistent with human food labeling and could reduce confusion for the pet owner.

In this "green" age, insisting on the term byproduct is earth-unfriendly. We should be promoting the use of quality secondary material

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streams in an effort to reduce, reuse and recycle. Plus, it is technically incorrect to assume the chicken leg on your dinner plate is the principal product when, in fact, it is a secondary product now that it is not being used for locomotion by the chicken. Thus, by your own definition, everything we eat or feed our pets is actually a byproduct.

So, come clean with the name and reduce our carbon-footprint at the same time by simply naming ingredients as what they are—if it is a lung, spleen or intestine, allow it to be labeled as such. For rendered meals, define them as “with” or

It is technically incorrect to assume the chicken leg on your dinner plate is the principal product.

“without internal organs” whether they be from fowl, fin or hoof. Then consumers will be armed with the information they need to make an informed choice.

4. NATIONAL RESEARCH COUNCIL (NRC): commission a full and comprehensive update of the United States-Canadian Tables of Feed Composition. This document was last updated in 1982. To put it into perspective, this precedes laptops, cell phones and the World Wide Web. The world has changed and so has the composition of many ingredients.

In today’s internet age, an online application, maybe even a wiki, would lend itself to a community effort—with independent commercial laboratories, petfood manufacturers and ingredient companies all participating—and continual improvement as new feed/petfood ingredient analyses were performed. Any bias could be removed through judicious use of statistics and an agreement among participants on definitions.

While national and regional

governments have funded human and livestock work along these lines, any progress that the US petfood industry makes will require self-funding. So, where previous efforts have fallen short, the industry, possibly led by the American Feed Industry Association or Pet Food Institute, will have to help nudge (shove) NRC forward to make this a reality.

5. UNITED STATES DEPARTMENT of Agriculture (USDA): include some pet-centric nutrient information in USDA National Nutrient Database for Standard Reference SR22. There are several food databases around the world,

but this is one of the most comprehensive nutrient datasets known.

Given so many petfoods have begun incorporating meats, vegetables, fruits, herbs and other ingredients out of the human ingredient supply chain, this dataset could expand its constituent base if it included just a few more nutrients. Examples would include things like crude fiber, chloride, iodine and biotin and, while you’re at it, a value for taurine would be nice, too. Further, add the nutrient profile for the “refuse” identified on many ingredients—some pets relish those parts.

IF ANY ONE of these actions were to be initiated this year, it could provide immediate benefit to pets and owners with lower costs, more choices and more responsive pet products. Thus, if any of these actions compels you, please tell someone. Maybe by mass action we will get momentum behind some of these actions and take our industry into a more ingredient-informed age. ■

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Research Notes

Key concepts

- **Higher fecal moisture in large dogs**
(*JAPAN* 93:703-709. doi:10.1111/j.1439-0396.2008.00858.x) Higher fecal sodium concentration and colonic permeability could be important explanations for higher fecal moisture in large dogs.
- **Feline iodine need lower than 2006 NRC**
(*J. Anim. Physiol. Anim. Nutr. (Berl.)* PubMed ID: 19906136) The iodine requirement determined for adult cats was higher than current AAFCO recommendations but lower than the 2006 NRC recommended allowance.
- **Flaxseed and PUFA enrichment in dogs**
(*Lipids*. PubMed ID: 19890671) One-way transport of DPAn-3 in the circulation may help conserve this fatty acid as a substrate for DHA synthesis in brain and retinal tissues, especially when dietary intake is low.

Higher fecal moisture in large dogs

This experiment was conducted to evaluate colonic permeability in dogs varying in body size and to determine whether it is related to fecal sodium concentration and quality. Six dogs each from four breeds were used: Miniature Poodles, Standard Schnauzers, Giant Schnauzers and Great Danes (GD).

The urinary lactulose to sucralose ratio was significantly lower in GD, indicating a higher colonic permeability. GD also presented higher fecal sodium concentrations and the poorest fecal quality. The higher fecal sodium concentration could be explained by the higher colonic permeability; both variables could be important explanations for higher fecal moisture in large dogs.

Source: D.C. Hernet *et al.*, 2009. Colonic permeability is higher in Great Danes compared with smaller breed dogs. *JAPAN* 93:703-709. doi:10.1111/j.1439-0396.2008.00858.x

Feline iodine need lower than 2006 NRC

The purpose of this study was to determine the iodine (I) requirement in adult cats. Forty-two healthy euthyroid cats (1.6-13.6 years old) were fed a dry basal diet (0.23 mg/kg I) for a minimum of one month, then switched to a

different basal diet supplemented with seven levels of KI for one year. Analyzed I concentrations were 0.17, 0.23, 0.47, 1.1, 3.1, 6.9 and 8.8 mg I/kg diet (dry matter basis).

No significant changes in food intake, weight gain or clinical signs were noted. Serum I, daily urinary I, daily fecal I and urinary I:creatinine ratio were linear functions of iodine intake. An estimate of the I requirement (i.e., breakpoint) was determined from regression of Tc(99m) thyroid:salivary ratio on I intake at 12 months as well as nine months I balance.

The I requirement estimate at 12 months for adult cats (0.46 mg I/kg) was higher than current Association of American Feed Control Officials recommendations (0.35 mg I/kg) but lower than the 2006 National Research Council recommended allowance for I (1.4 mg I/kg).

Source: K.J. Wedekind *et al.*, 2009. The feline iodine requirement is lower than the 2006 NRC recommended allowance. *J. Anim. Physiol. Anim. Nutr.* (Berl.) PubMed ID: 19906136

Flaxseed and PUFA enrichment in dogs

A study assessed n-3 long chain polyunsaturated fatty acid (PUFA) incorporation after feeding an alpha-linolenic (ALA) rich flaxseed supplemented diet (FLX) to dogs. Enrichment of ALA, eicosapentaenoic acid (EPA) and docosapentaenoic acid n-3 (DPAn-3) in the FLX-group occurred early on in both phospholipids (PL) and triacylglycerol (TG) fractions but no docosahexaenoic acid (DHA) was found, consistent with data from other species, including humans.

The accumulation of DPAn-3 in fasting PL and TG fractions is likely due to post-absorptive secretion after tissue synthesis. Because conversion of DPAn-3 to DHA occurs in canine neurologic tissues, this DPAn-3 may provide a circulating reservoir for DHA synthesis in such tissues.

Although conversion of DPAn-3 to DHA is slow in most species, one-way transport of DPAn-3 in the circulation may help conserve this fatty acid as a substrate for DHA synthesis in brain and retinal tissues, especially when dietary intake of DHA is low.

Source: B.L. Dunbar *et al.*, 2009. Early and sustained enrichment of serum n-3 long chain polyunsaturated fatty acids in dogs fed a flaxseed supplemented diet. *Lipids*. PubMed ID: 19890671

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- I believe through globalisation all consumers are becoming alike, so my way of doing business will be a roaring success in each country I try to enter.
- I've never missed a new opportunity, so unlike others I never have to say: "why didn't I think of that first?"
- My business is running as smoothly as it can, or is it that I usually tune out the things I don't like to be confronted with.
- I'm certain that I talk to my customers in a way they easily understand and that can fulfil their needs – No one does this better than me and my organization.
- I have my team of internal experts; they know what I need to know.

Results of the mirror test for your petfood business:

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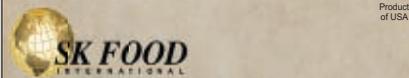
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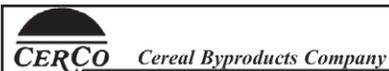
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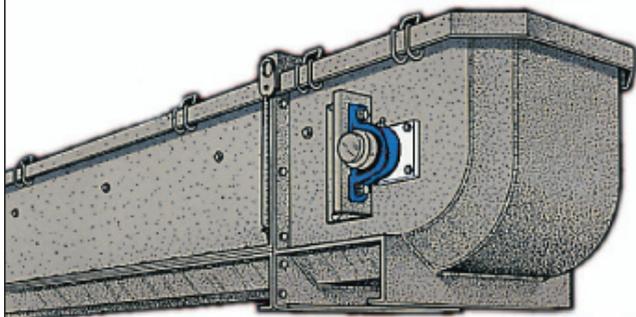
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- AFIA Pet Food Conference, January 26-27, 2010, Georgia World Conference Center, Atlanta, Georgia, USA. For more information, visit www.petfoodconference.com/2010PFC/index.cfm.



- International Feed and Poultry Expo, January 26-29, 2010, Georgia World Conference Center, Atlanta, Georgia, USA. For more information, visit www.ipe10.org.
- Global PETS Forum, January 28-29, 2010, Vienna, Austria. Visit www.petsinfo.net/pets/petsinfo/globalpetsforum for more information.
- Practical Short Course on Feeds & Pet Food Extrusion, January 31-February 5, 2010, Texas A&M University, College Station, Texas, USA. Register at www.tamu.edu/extrusion.

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- Packaging Conference, February 8-10, 2010, ARIA Resort, Las Vegas, Nevada, USA. Visit www.thepackagingconference.com or email info@plastictechnologies.com for more information.
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- Zoo Russia Professional, February 18-21, 2010, Hall 1, Crocus Expo, Moscow, Russia. For registration information, email nviongradova@astigroup.ru or visit www.zoorussia.ru.
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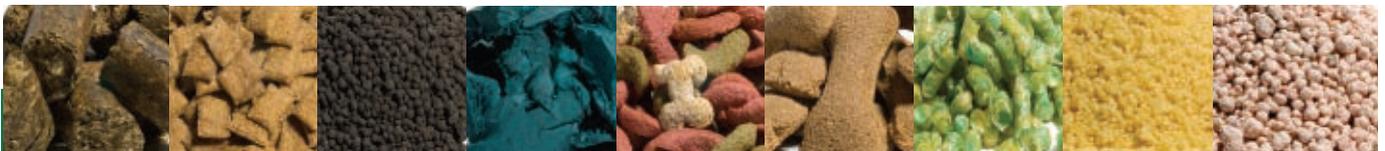
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