DOMINOES FALLING IN PETFOOD INGREDIENT MARKET

p. 18

Update: the global petfood market for 2011
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NEARLY EVERY PETFOOD producer I have talked with this year, including in Europe, has expressed concern about the continually escalating cost of ingredients, especially commodities.

If you have to buy grain ingredients for your company or track their prices, you’re probably feeling a sense of déjà vu. It was just three years ago that we saw prices for corn, wheat and other grains continually rise, eventually reaching historic highs, forcing overall costs higher and significantly impacting the bottom line for every entity in the supply chain.

Well, here we go again. Yet in comparing the grain crisis of 2008 to this year’s, there is good news and bad, according to Paul Aho, PhD, a poultry economist writing in the March/April issue of Feed Management (www.feedmanagement-digital.com).

The good news, he said, is this year’s prices should not spike to the record-high levels they hit in 2008 (though, as of this writing, corn futures for this month were trading on the Chicago Board of Trade at US$7.07 a bushel, according to WattAgNet.com). The bad news is the high prices will persist longer. “This will be a war of attrition in comparison to the blitzkrieg of 2008,” he wrote. “The inevitable subsequent fall in grain prices may be delayed for more than a year.”

DR. AHO’S ANALYSIS centered on corn, and with many of you using corn-based ingredients in your formulations, you could be in for a long siege. The price hit US$6 a bushel in March (it took until summer for it to reach that level in 2008) and has since kept climbing higher. The Food Agriculture Organization’s June Food Outlook projects the high prices and volatility to continue throughout this year and into 2012.

The culprit, as usual, is demand outpacing supply. As the world recovers from the recession, demand for feed grains is increasing, especially in countries like China, Dr. Aho said. Some grains like corn are also going toward ethanol production. On the supply side, a very wet, cool spring in the US Midwest has slowed planting for corn and other commodity crops. While recent warmer weather is improving the outlook, there’s no question yields could be affected.

The US Department of Agriculture projected 92.2 million acres of corn would be planted in the US this year, yielding 13.5 million bushels. But as of the end of May, USDA reported only 86% of the crop had been planted. Craig Solberg, meteorologist with Freese-Notis Weather Inc., was quoted by Jeff Caldwell on Agriculture.com saying that for the first time since 1996, more than 10% of the US corn crop is being planted in June. And global stockpiles of corn are expected to reach their lowest levels since 1974, according to Bloomberg.

Even if you don’t use corn-based ingredients, you are likely feeling the pinch of higher pricing, because it’s also hitting wheat, soybeans and other commodities—and all are interrelated. Even higher prices and demand for cotton affect grain prices because the more cotton grown, the less land available for grain crops. Add in continually escalating fuel prices, and it’s not a pretty picture.

There is a silver lining, Dr. Aho said: The continued high prices will create a powerful incentive to increase grain production globally, but that will likely take a year or two to ramp up.

On p. 18, Dr. George Collings of Nutrition Solutions offers tips on how to plan for and mitigate this situation. The key, he says, is to be proactive—usually the best advice for most business and industry challenges.
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Budget cuts proposed by US House Republicans to the US Food and Drug Administration would undermine the agency’s ability to carry out the food safety legislation passed by Congress in December 2010, according to an article from The Washington Post.

President Obama is seeking US$955 million for food safety at FDA in the fiscal year that starts October 1. The US House Appropriations subcommittee that oversees FDA scaled back that amount to US$750 million, which is US$87 million less than the amount the agency is currently receiving for food safety.

Food safety advocates said that without additional money, FDA will not be able to meet many requirements of the new law, including increased inspections of food manufacturing plants, better coordination with state health departments and developing the capacity to respond quicker to foodborne illnesses. The proposed budget cuts would also hinder FDA’s ability to increase scrutiny of imported foods, according to Erik Olson, director of food and consumer product safety programs at the Pew Health Group.

Call for papers for 2012 Petfood Forum events announced

A call for papers for Petfood Forum 2012 and Petfood Forum Asia 2012 has been announced by the editors of Petfood Industry, organizer of the events.

Petfood Forum is scheduled for April 2-4, 2012, at the Renaissance Schaumburg Convention Center Hotel in the Chicago, Ill., area. Potential speakers are invited to submit non-commercial abstracts featuring new research or innovations on topics such as nutrition, ingredients, petfood safety, marketing and market trends, packaging and case studies. The deadline for submissions is October 1, 2011. More information is available www.petfoodindustry.com/PFF2012.aspx (click on the “Call for papers” tab).

Petfood Forum Asia will take place February 16, 2012, at the Bangkok International Trade & Exhibition Centre in Thailand. The editors are seeking non-commercial papers on topics such as the Asian and global petfood markets, nutrition and ingredients, regulatory and export issues and processing innovations. The deadline for submissions is September 1, 2011. Visit www.petfoodindustry.com/PFFAsia2012.aspx and click on the “Call for papers” tab.

Proposed budget cuts may hinder FDA’s food safety regulation

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Corrections

“Emerging food safety technologies” in the April issue inadvertently misstated that one of the technologies, high pressure processing, used by raw petfood manufacturers such as Nature’s Variety, causes the petfood to no longer be raw. This is not the case; HPP does not cause any chemical transformation or structural changes to the foods.

“US petfood import and export trends” in the June issue had a mistake in Figure 1 on p. 26. The lines denoting imports and exports were transposed. For the correct version, please see www.petfoodindustry.com/7100.html (click on the “More images” tab). We regret the errors.
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Nestlé Purina PetCare Co. offers Purina One Beyond line for dogs and cats. Purina says it’s One Beyond line features real meat as the number one ingredient, but also contains vitamins, minerals and whole grains accented with fruits and vegetables. Two adult dog formulas are offered: Chicken & Whole Oat Meal Recipe with carrots, tomatoes and apples; and Lamb & Whole Barley Recipe with blueberries, sweet potatoes and spinach. Two adult cat formulas are also offered: Salmon & Whole Brown Rice Recipe with cranberries, tomatoes and spinach; and Chicken & Whole Oat Meal Recipe with carrots, sweet potatoes and apples.

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All Life Stages Chicken dog food
Carna4 Inc. offers All Life Stages Chicken dog food. The company says the dog food is made with fresh, table-grade chicken, wild salmon, eggs, whole produce and sprouted seeds. The food is baked, according to Carna4, to preserve authentic flavors and natural nutrients.

Carna4 Inc.
+1.855.422.7624
carna4.com

Grain-Free Chicken Formula cat food
Natura Pet Products offers California Natural Grain-Free Chicken Formula cat and kitten food. The food is formulated using limited ingredients to support a healthy skin and coat, the company says. The food includes ingredients such as chicken, peas, flaxseed, sunflower oil and vitamin E, according to Natura. The food for all lifestages is available in 5-pound and 15-pound bags.

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www.naturapet.com

Gimborn Pro-Treat Plus for dogs and cats
Miracle Corp. Products offers Gimborn Pro-Treat Plus treats for dogs and cats. The treats are all-natural and freeze-dried, according to the company. The line includes four varieties: chicken with broccoli, strawberries and carrots; chicken with sweet potatoes, cranberries and peas; liver with peas, carrots and bananas; and liver with sweet potatoes, broccoli and cranberries.

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www.infiniapetfood.com

Clear Conscience Pet SuperGravy
Clear Conscience Pet LLC offers SuperGravy. It's a holistic instant gravy mix, according to the company, that contains liver and heart from grass-fed, free-range raised bison and beef, Aztec omega fatty acids and organic spinach, pumpkin and carrots. SuperGravy comes packaged in a small pouch for a 30-day supply, the company says.

Clear Conscience Pet LLC
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www.clearconsciencepet.com

Smartdog Jerky dog jerky treats
Smartdog Jerky offers dog jerky treats. The treats are made with natural, US Department of Agriculture-certified ingredients and are high in protein and low in carbohydrates, according to the company. The jerky treat line includes Real Chicken Breast Jerky, Red Beef Jerky and Real Beef Jerky Sticks. The treats come in packages that feature different rescued dogs.

Smartdog Jerky
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www.smartdogjerky.com

Sergeant’s Fresh Catch dog treat line
Sergeant’s Pet Care Products Inc. offers the Fresh Catch dog treat line. These treats are made from fish and are rich in fish oils, offering heart and immune system support, according to Sergeant’s. The treats are good for any size dog, the company says.

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July 2011
**Dual head extruder die change-out machine**

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**Insta-Pro International coolers**

Insta-Pro International offers a line of coolers. The company says its coolers remove heat and vapor from extruded meal products prior to storage. The coolers are available in mild or stainless steel construction and have optional drum guards for CE-compliance applications. Insta-Pro offers four models of coolers, with cooling capacities from 1,000 pounds to 8,000 pounds.

**Concetti Group petfood bagging systems**

Concetti Group offers petfood bagging systems. The fully automatic bagging systems come in the following models: IPF40, IMF, IGF and Continua FFS. The bagging systems work with a variety of bag materials and bag types and offer closing systems such as heat sealing at different heights, pinch-top, adhesive tape application, sewing or various combinations, according to the company.

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For Manufacturers

**Buhler Inc. Kubex T pellet mill**
Buhler Inc. offers the Kubex T pellet mill. The company says its pellet mill comes in two versions: Kubex T12, with power up to 585 kW, 1200 mm die diameter and pelleting capacities up to 80 tons/hour; and Kubex T9, with power up to 410 kW, 900 mm die and production capacities of up to 50 t/h.

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Reduced ingredient inventories, use of grains and fats for biofuels and increasing fuel prices are among the factors contributing to a domino effect in the market.

Smart producers who understand contributing factors and take a proactive approach will likely be the ones left standing in the petfood ingredient market. The days of US$2-per-bushel corn seem a faint memory for those of us who have been in the petfood business for many years. Today, corn prices are over US$7 per bushel, with some experts projecting a rise as high as 35% over the next year.

The decision to use US corn crops to produce ethanol for automobiles concerned many of us (approximately...
35% of corn is used in ethanol production) and has become a domino on the prices of other ingredients and products. Wheat and soy prices increase along with corn prices because farmers replace their acreage with corn. In turn, this drives up feed/food production costs and potentially will reduce production. All of this will lead to increased prices of meat, milk and eggs and will be felt in the petfood industry.

Additionally, unstable and rising fuel costs will increase manufacturing and logistics costs throughout the pipeline. Using fats as biodiesel will likely reduce inventories necessary for the petfood industry. Adding insult to injury are the unexpected natural phenomena (rain, wind, storms, floods, earthquakes and fire). All of these reduce or slow farm or fleet output/harvest, destroy potential inventories and reduce delivery.

Further complicating the situation, the humanization of petfood products has increased the use of some ingredients (e.g., pea, potato, chicken meal) with limited inventories while demonizing the use of more common ingredients (e.g., corn, wheat, soybean) with larger inventories. Add to this a greater demand for export and increasing quality standards, regulations and inspections—the domino effect is profound.

**What can a petfood company do before the dominoes fall?** A simple answer is to build a comprehensive business plan covering all phases of the business and focusing on efficiency, cost containment and planning. If your company is a petfood producer, it must make sure the pipeline of ingredients is connected to the goals of marketing/sales. Communication between groups is more vital than ever. Providing quality ingredients to production is as critical to the fulfillment of the business plan as any marketing/sales campaign.

**Unstable and rising fuel costs will increase manufacturing and logistics costs throughout the pipeline.**

More importantly, a good business must become more proactive and less reactive. Don’t wait for the dominoes to fall and reduce the company’s potential. In recent years, short supplies of ingredients (e.g., chicken meal, fish meal) have unexpectedly hit companies quite hard. A proactive business:

- Builds relationships with ingredient suppliers, increasing communication to know inventories, production and quality issues;

**Some of the immediate, shorter-term choices with falling dominoes include:**

- **Price increases.** With increasing ingredient prices comes the unavoidable increase in the final finished food or treat price. While in times past, this might have happened annually or with a shift in ingredient use, we might see prices increase much more often in the future.

- **Package size and density.** Another choice is to reduce package sizing or decrease density. Minor changes to
package volume are less noticeable, and if coupled with a lighter density, the package seems the same. All of this helps minimize the perceived impact to the consumer.

- **Formulation review.** Oftentimes, petfood products are over-formulated past guarantees. This increases cost-of-goods and can overuse some key, higher-priced ingredients. Projections should be made for best use of potential inventories as well as tightened up formulations. This can reduce costs of formulas and help reduce price increases.

- **Brand review.** Falling dominoes should force a review of the purpose of each ingredient used. Some ingredients may be too expensive and need adjustment. Some ingredients may be unnecessary in supporting the brand image and overall nutritional profile. The purpose is to reduce the cost-of-goods while maintaining the brand image. All of this must be kept in balance with packaging inventory costs.

- **Production review.** Equally important is a specific review of production focusing on issues with ingredient handling and delivery, inventory management, production throughput, yield, quality hurdles and contaminations. As dominoes fall, this is vital to improve efficiency and manage costs. Those who grasp these issues and implement a proactive posture will be the ones most likely left standing when future dominoes fall.

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Dr. Collings is general manager of Nutrition Solutions (www.nutrisolutions.com), a consultancy for all phases of new and existing nutrition businesses (pet, animal, human).
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IN 2010, SALES of the overall global pet market remained positively resilient (a predicted US$80 billion), according to Lee Linthicum, head of global food research for Euromonitor International. This represents a growth of 4.4% over 2009.

When the entire pet care channel is broken into categories, dog and cat food are the biggest categories, with total market shares of 55%. The dog food category has grown in its relative importance against cat food, says Linthicum. This is due in part to greater ownership of dogs in general, especially in emerging markets such as Latin America.

The humanization of companion animals is a strong driver in the way consumers perceive pet products and pet brands globally. What does that mean for the future?

Update: the global petfood market for 2011

By Jessica Taylor

In recent years, various factors like pet humanization, sustainability and ingredients that are human-grade or have health benefits for animals are driving developed global markets forward.
North America is by far the largest retail market for petfood. It is also the most mature market, with the average household expected to spend US$225 per household on petfood and pet products in 2010.

In contrast, Eastern Europe and Latin America are relatively immature markets with average household expenditures of less than US$50, less than a quarter of those in North America. However, household expenditure on pet care has risen tremendously over the past five years. In Eastern Europe, household expenditure has grown by more than 60% over the past five years, which is equivalent to 13% every year. This is largely due to the fact that many pet owners are still feeding their pets with table scraps and home-cooked food, not commercially prepared food.

According to Euromonitor, cat treats and mixers are the fastest growing segment in the petfood, treats and mixers category, increasing market share globally by 12% over the past 10 years. Categories like premium dog food (9%), premium cat food (9%), dog treats and mixers (7%) and pet dietary supplements (5%) have also experienced growth in a global way.

Value-minded private label petfood is also increasingly bringing new consumers into the global petfood market, especially in developing markets like the Asian-Pacific region, Latin America and Eastern Europe. This trend is bolstered by the expansion of supermarkets/hypermarkets in these regions as well.

In more developed markets, private label petfood is becoming more premium-minded, and the

Figure 1. Change in US retail sales of petfood, 2006-2015
According to Packaged Facts data, overall sales of petfood will grow slightly until 2013 and then remain stagnant for several years.

<table>
<thead>
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<th>Year</th>
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<td>2008</td>
<td>5.4</td>
</tr>
<tr>
<td>2007</td>
<td>6.1</td>
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<tr>
<td>2006</td>
<td>5.0</td>
</tr>
</tbody>
</table>

Source: Packaged Facts

Figure 2. Top marketing claims for US petfood products, 2008-2010
‘Natural’ continues to be the buzzword driving US consumers to choose one petfood over another on the shelf, while claims like ‘no artificial color’ and ‘no preservatives’ are not as popular as they were several years ago.

<table>
<thead>
<tr>
<th>Package Tag/Claim</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Natural</td>
<td>159</td>
<td>182</td>
<td>211</td>
</tr>
<tr>
<td>High vitamins</td>
<td>111</td>
<td>114</td>
<td>106</td>
</tr>
<tr>
<td>Upscale</td>
<td>139</td>
<td>168</td>
<td>88</td>
</tr>
<tr>
<td>High protein</td>
<td>89</td>
<td>75</td>
<td>87</td>
</tr>
<tr>
<td>High minerals</td>
<td>93</td>
<td>84</td>
<td>86</td>
</tr>
<tr>
<td>No preservatives</td>
<td>89</td>
<td>99</td>
<td>75</td>
</tr>
<tr>
<td>Real</td>
<td>54</td>
<td>48</td>
<td>63</td>
</tr>
<tr>
<td>No wheat</td>
<td>67</td>
<td>56</td>
<td>61</td>
</tr>
<tr>
<td>No artificial color</td>
<td>67</td>
<td>58</td>
<td>45</td>
</tr>
<tr>
<td>Low fat</td>
<td>45</td>
<td>34</td>
<td>41</td>
</tr>
</tbody>
</table>

Source: Product Launch Analytics; Packaged Facts. This material is reprinted with permission.

Viva Italia!

Market focus: Italy
According to the 2011 report, *Pet Food and Pet Care Products* from ASSALCO (the Italian Association of Pet Food and Pet Care Companies) and Zoomark International, in 2010 the Italian market of petfood and pet care products continued to show a positive trend, although at a lower rate than in the recent past, due to a generalized consumer crisis. The information on the main segment, i.e. dog and cat food, showed a growth of 2.2%.

On the major distribution channels as a whole (including pet shops, pet superstores and the grocery channel), the Italian market of dog and cat food in 2010 exceeded 1.6 billion Euro (US$2.3 billion). Wet food dominated the cat food sector and is continuing to grow faster than dry food (2.8% vs +1.7%) thanks to high quality gourmet recipes and single-serve formats, according to the report. Dry dog food exceeds wet dog food, but the latter has a more positive performance (2.9% in value) while the sales of dry food remain substantially stable. The performance of wet food is therefore positive for both the dog and cat sectors, reaching a market share of 53% in value.

The treats and snacks segment in the Italian region represented 4.8% of the total dog and cat food sold in 2010. Also, because of its relatively recent introduction in the Italian market compared with traditional petfood, the treat segment has shown great vitality (up 9.8% in 2010 over 2009).
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In well-established markets like the US and Western Europe, consumers pay close attention to labels, packaging and marketing claims. Recent research stressing the importance of the human-animal bond and the humanization of companion animals are strong drivers in the way consumers perceive pet products and pet brands in general.

**Pet humanization** has also led to specialized formulas flooding rapidly growing markets like Brazil and China, with foods addressing a multitude of health issues. In Japan, petfoods focused on the aging and senior pet population are popular.

Euromonitor predicts that countries like India, Russia, Turkey and Poland will experience the fastest amount of growth until 2015. The US, Brazil and Japan will remain the largest markets. Globally, the entire pet segment has room to grow and more market share to gain in developing regions in Eastern Europe, the Middle East and China.

---

**Figure 3. Dog and cat food: key growth segments globally**
Fastest growing segments in the petfood, treats and mixers category, globally.

<table>
<thead>
<tr>
<th>Segment</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cat treats and mixers</td>
<td>12</td>
</tr>
<tr>
<td>Premium dog food</td>
<td>9</td>
</tr>
<tr>
<td>Premium cat food</td>
<td>8</td>
</tr>
<tr>
<td>Pet healthcare</td>
<td>8</td>
</tr>
<tr>
<td>Dog treats and mixers</td>
<td>7</td>
</tr>
<tr>
<td>Economy dog food</td>
<td>6</td>
</tr>
<tr>
<td>Dietary supplements</td>
<td>5</td>
</tr>
<tr>
<td>Mid-priced dog food</td>
<td>5</td>
</tr>
<tr>
<td>Mid-priced cat food</td>
<td>5</td>
</tr>
<tr>
<td>Economy cat food</td>
<td>4</td>
</tr>
</tbody>
</table>

Global expansion of pet superstores is creating new opportunities for private label petfood to grow market share. Treats, premium food and an emphasis on pet healthcare are also driving global growth.

In well-established markets like the US and Western Europe,

---

**Figure 4. Dog and cat food: largest vs. fastest growing global markets**

According to Euromonitor data, countries like India, Russia and China will grow their petfood markets the fastest into 2015.

10 largest markets in 2015

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<thead>
<tr>
<th>Country</th>
<th>2015 US$ Millions</th>
<th>2010-2015 CAGR</th>
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</thead>
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<tr>
<td>Brazil</td>
<td>5,857</td>
<td>6.2</td>
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<tr>
<td>Japan</td>
<td>4,435</td>
<td>0.2</td>
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<tr>
<td>France</td>
<td>4,219</td>
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<tr>
<td>UK</td>
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<td>1.1</td>
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<td>Germany</td>
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<td>Italy</td>
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<td>Russia</td>
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<tr>
<td>Canada</td>
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<td>3.1</td>
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<tr>
<td>Australia</td>
<td>1,675</td>
<td>1.9</td>
</tr>
</tbody>
</table>

10 fastest growing markets to 2015

<table>
<thead>
<tr>
<th>Country</th>
<th>2015 US$ Millions</th>
<th>2010-2015 CAGR</th>
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</thead>
<tbody>
<tr>
<td>India</td>
<td>82</td>
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<tr>
<td>Saudi Arabia</td>
<td>28</td>
<td>9.8</td>
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<td>Russia</td>
<td>2,161</td>
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<td>Turkey</td>
<td>220</td>
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<td>Romania</td>
<td>246</td>
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<tr>
<td>China</td>
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<td>Ukraine</td>
<td>304</td>
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<td>Morocco</td>
<td>57</td>
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</tr>
<tr>
<td>Poland</td>
<td>685</td>
<td>7.5</td>
</tr>
</tbody>
</table>
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Products China
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Nor Feed A/S
Novo SA
Novus Nutritional
Brands LLC
NutriCea
Nutrissence Innovations LLC
Ortra Additives BV
Ortra Inc/Exsentials
Petfood Enterprise Technologies LLC
Procter Pet Nutrition
Premier Pet Nutrition
Premium Ingredients
International
ProFood Inc
Proves BV
Select Botanical SL
Societe Francaise de Premie
Specialties, Hivos NDA Group
Solar Industries Ltd
SpanTechs
SPS Press (Import & Export)
Styrka Botanics

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We surveyed German Shepherd breeders in the Netherlands about the use of puppy milk replacers (PMR). The metabolizable energy, calcium, phosphorus and vitamin D content of the eight most used PMR were compared with that of bitch milk, as reported in the literature.

The protein and fat content of most PMR were somewhat lower compared with bitch milk. The vitamin D content of one of the PMR samples was sevenfold the level recommended by the Nutrient Requirements of Dogs and Cats (National Academy Press, 2006) and threefold the average level of bitch milk. The clinical relevance of this high amount is questionable, as bitch milk contains mainly 25-hydroxy-vitamin D and only limited amounts of vitamin D, as was determined in this study.

Dutch German Shepherd breeders tended to overfeed their puppies. We calculated that misguided use of PMR can increase the risk of excessive calcium, phosphorus and possibly vitamin D intake during a vulnerable period, potentially giving rise to bone and cartilage problems later in life.


Key concepts

- Use of puppy milk replacers in large breeds
- Misguided use of PMR can increase the risk of excessive calcium, phosphorus and possibly vitamin D intake during a vulnerable period.

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- **International Grains Program Extrusion Processing Short Course**, August 9-12, 2011. The IGP Conference Center, Kansas State University, Manhattan, Kansas, USA. To view the course schedule and registration, visit www.grains.k-state.edu/igp.
- **International Grains Program Recent Advances in Biofuels Short Course**, August 25-26, 2011. The IGP Conference Center, Kansas State University, Manhattan, Kansas, USA. To view the course schedule and registration, visit www.grains.k-state.edu/igp.

### Online events

- **Virtual Petfood Forum – Making Safe Petfood in Today’s Rapidly Changing Environment** will take place October 26, 2011, 8-5PM CST. This is a live event, so make sure to go to www.petfoodindustry.com/petfoodforum.aspx for the latest information and for information on registration, topics and schedule.
- **Mocon Inc.** has announced its 2011 Free Webinar Series which began March 9, 2011, and takes place once a month until December 10, 2011. To view class details and registration information, please visit www.mocon.com/events.php.
- **AFIA Webcasts: Controlling Salmonella in Your Facility and Management Considerations for Salmonella/Microbial Control** are available for download at www.afia.org.
- The **Powder and Bulk Online Training Center** is a virtual campus providing online training and lectures on topics such as Pneumatic Conveying, Mixing & Blending and Solids Flow. All of these web-only classes are available at www.powderandbulk.com/online_training.
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