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Interzoo 2022



Food and ingredients

How do consumers feel about vegan pet food? How sustainable is BARF? How much demand is there for probiotics? And what about a keto diet for pets?



Global pet industry

What is trending in the pet supplement market? What influences trends in leashes, collars and harnesses? We dive into wearable tech and the continuing acquisition boom in the industry.



Benelux

How has the Benelux pet industry evolved since our last update? Local retailers Tom&Co and Discus share how they're doing and what they're planning.



Vegan pet food survey

What are the main reasons pet parents give their dog vegan pet food? What's stopping those that don't? And what influences their buying behavior? [Page 8](#)



BARF subscriptions

Consumer demand for BARF is increasing. What are the differences between countries and regions? And is it actually better for pets? [Page 17](#)



Wearable tech

A review of the latest developments in this booming market and its changing market players. How are things developing in Asia? And what are the concerns? [Page 54](#)

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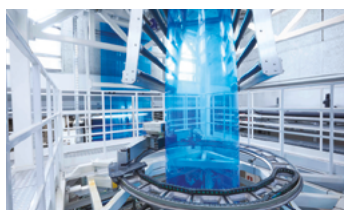
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It's all about what's trending

In the February issue, we discussed the trending topic of sustainability. An important aspect of that is plant-based pet food. But how do pet owners feel about feeding their pets vegan meals? Together with Yummypets, we did a survey to figure out: How many people are feeding their dogs a plant-based diet? What's stopping others from doing it? What factors impact their purchasing decisions? You'll find the answers on page 8.

Whether or not BARF is sustainable – opinions are divided. But there's no denying the increased interest from pet owners. So we dive into the question of how sustainable raw food actually is. And you'll find an update on the raw food subscription market.

What's a hotter topic than sustainability? It would have to be health-enhancing products. Supplements and additives are a booming market that can't be ignored. You'll discover the latest supplement trends, and we zoom in on water additives. On the accessories front: what's trending in leashes, collars, harnesses and tags? And how about wearable tech? Read all about that from page 52 onwards.

For this issue's regional deep dive, we tell you more about the Benelux market. The retailers Tom&Co and Discus talk about how they're carving out positions for themselves. And you'll find a general overview of the industry in this region.

In the last issue, I promised you different types of trends analysis this year. On page 29, you'll see the first 'Trend Alert' that digs into consumer demand for probiotics. Please let us know what you think of this format and, perhaps, other things you'd like to read in the magazine.

The GlobalPETS Forum has the green light for April, so I hope to see you there! *(If you don't have tickets yet, please hurry... before the last 20% are sold.)*

Philippe Vanderhoydonck
Managing Director

PS: If you don't receive our newsletters yet, go to globalpetindustry.com and sign up to keep a finger on the pulse of the industry.



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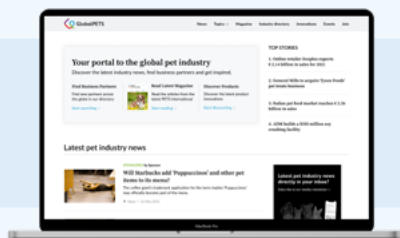
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China lifts ban on certain pet food imports

Exported canned pet compound food (wet food), exported pet snacks, and other commercially sterilized canned pet food of avian origin will not be affected by avian-related epidemics and will be allowed to be exported to China.

So far, 19 countries have been approved to export finished pet food products or raw materials to China: Argentina, Australia, Austria, Belgium, Brazil, Canada, the Czech Republic, Denmark, France, Germany, Italy, Kyrgyzstan, the Netherlands, New Zealand, the Philippines, Spain, Thailand, the US and Uzbekistan.

In addition, exported pet snacks do not need to apply for the Registered License issued by the Ministry of Agriculture and Rural Affairs. For companies that had been blocked from exporting to China due to the ban on poultry ingredients, this is good news.

Fressnapf achieves a record €3 / \$3.4 billion in sales and is opening 400 new stores

In 2021, the pet retail group Fressnapf increased its sales by 19.8% against 2020, with a strong performance in the online channel and the German market. This represents the most significant growth in more than 3 decades of the company's history.

Germany, with sales of €1.81 billion (\$2B), accounted for more than half of the total gross sales of €3.17 billion (\$3.59B). The company said that double-digit growth was also achieved in the other 10 countries where its products are available, accounting for €1.36 billion (\$1.54B). Its online sales grew by 54% in 2021.

Although Fressnapf did not unveil the specific markets where it plans to open new stores, Managing Director Johannes Steegmann highlighted the fact that they have equipped their logistics infrastructure "for the future" with new warehouses in Poland, France and Austria.



Jollies plans expansion after a 30% sales increase in 2 years

The British chain Jollies is set to open 20 new stores across the country amid increased demand for pet products, including dog toys. The company is also looking for more acquisitions following the purchase of 2 businesses in 2021 – Yorkshire-based The Pet Store and Bannerbrook Pets – which took its total number of stores to over 70.

In the half-year to 30 November 2021, company revenue increased to £42 million (€50M / \$56.6M), a 12.5% rise against the previous year. In the same period of 2019, revenue was £29.4 million (€35M / \$39.6M). The company said that sales broke all records last December.





Royal Canin acquires fresh pet food producer Nom Nom

Royal Canin believes that the acquisition of the “fast-growing” DTC fresh pet food company Nom Nom will bring synergies that will support the brand’s success in the dog and cat category, while complementing the multinational’s existing portfolio.

Nom Nom will act as an independent brand within the Royal Canin division, with its own positioning strategies. Although the terms of the deal have not been disclosed, Bloomberg reported that the acquisition is worth \$1 billion (€800M).



Swedencare acquires premium pet supplements company NaturVet

With the acquisition of NaturVet, worth \$447.5 million (€393M), Swedencare gains a stronger foothold in the US pet supplement market. NaturVet was founded in 1994 by CEO Scott Garmon and offers pet supplements in 20 different categories.

NaturVet’s sales for 2020 were \$48.4 million (€42.5M) with an adjusted EBITDA of \$15.3 / €13.7 million (31.7%). Corresponding sales for the period October 2020-September 2021 were \$60.6 million (€53.2M) with an adjusted EBITDA of \$18.9 / €16.9 million (31.1%).

Scott Garmon will continue to lead the company, together with his experienced management team. Garmon will also become one of the largest shareholders in Swedencare.



Protix raises €50 / \$56 million to expand its footprint in the insect protein space

Protix’s next growth phase is all about global site expansion, building new facilities, and increasing capacity. The €50 million (\$57M) investment will be used for international expansion and R&D efforts.

CEO and founder Kees Aarts says: “In 2021, we achieved continued commercial success, completed an exciting and successful breeding program, and strengthened our organization with new talent in key positions. Continued appetite from financial institutions and impact investors alike reinforces our stepwise approach to scaling our business. This is an important step towards further exponential growth.”

Pets at Home revenue grows in 2021 amid robust market

Pets at Home income increased by 5.8% in the last 3 months of last year, while the company warned about an “inflationary pressure” across the supply chain.

The UK’s largest pet care retailer posted £319.4 million (\$431.68M / €382.50M) in revenue in the last quarter of 2021, which means an increase of more than 28% in 2 years.

“The UK pet care market remains robust, with strong continued growth in new pet owner customers, and prevailing customer themes of long-term pet ownership, humanization and premiumization, creating a sustainable tailwind for growth across our business,” the company said in a trading update.



PET INDUSTRY HIGHLIGHTS



German pet industry pioneer Ernst Koch has passed away at age 92

Ernst Koch founded pet accessories company KOCH in 1973 and published one of the first catalogs for pet supplies.

The company announced in an obituary that Koch died on 12 January. "Together with his wife, Ingrid Koch, he built their family business with a great deal of energy, passion and devotion," it reads. The company remembers him as a "well-respected company manager. There will always be memories of his life through thoughts, pictures, moments and feelings. They will always remind us of him and he will never be forgotten."

Pets at Home announces appointment of new CEO

On 1 June, Lyssa McGowan will succeed Peter Pritchard. Lyssa is the outgoing Chief Consumer Officer at Sky UK Limited, with responsibility for its consumer business serving more than 10 million customers and achieving over \$10 billion (€9B) of revenue.



Spanish pet industry protests against proposed act on animal welfare

The local pet industry took to the streets of Madrid on 23 January to oppose the new Animal Welfare Act. In the demonstration, the industry raised concerns about the legal insecurities and lack of scientific arguments for this law, which aims to harmonize animal welfare regulations in the country.

If approved, the new law will oblige pet owners to take good care of animals, and that includes ensuring a good quality living place and hygiene. The draft law also states that owners must make sure that pets do not foul unauthorized areas, and ensure that animals are given obligatory veterinarian treatment. Pet owners will further be obliged to take a test to certify that they are prepared and qualified for owning an animal.



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NATURAL FOOD INGREDIENTS



Food and ingredients

How do consumers feel about vegan pet food? We did a global survey project to find out. And on the opposite end: While the BARF market is heating up, how sustainable is it, really? How are subscription companies doing in this space? Probiotics for pets are also very much on-trend. You'll discover how much demand there is for it, in a new format: a 'Trend Alert'.

Survey: how do pet parents feel about vegan pet food?	8
Is a new era beckoning for meat analogs?	12
Plant structure and nutrient bioaccessibility	15
The state of play in the raw food subscriptions market	17
How can raw meat for dogs remain sustainable in the future?	20

Keto diets as pet food: dangerous or beneficial?	22
Why krill is the new star in the omega-3 pet supplement space	25
Utilizing psychobiotics to improve pet mood	26
Trend Alert: probiotics for dogs and cats	29



Survey: how do pet parents feel about vegan pet food?

What stops pet owners from switching to a vegan diet for their dogs? What types of consumers are more likely to seek out vegan products for their pets? A recent survey conducted together with Yummypets reveals all the answers.

The majority of consumers are still meat-eaters, accounting for over half of those questioned in this survey. The remainder were flexitarian (17.9%), vegetarian (12%), vegan (9.2%) or pescatarian (3.1%).

Human dietary preferences

Missing the taste of meat and fish is the main reason why a majority of respondents have not opted for vegan diets. Health fears, based on becoming protein deficient, and cost are also major considerations.

On the other hand, the main reason why consumers had chosen to adopt a vegan lifestyle is animal cruelty, although US vegan pet parents were more likely to opt for this kind of diet due to health concerns.

Vegan for cats and dogs?

Awareness of dietary needs for pets was high, with over 77% understanding the fact that cats and dogs don't have the same dietary needs.

There was a general feeling that cats are natural carnivores, with only 16.4% of people believing that cats can eat anything.

When it comes to dogs, awareness was much more mixed. 45.6% believe that dogs are carnivores, 42.5% feel they are omnivores, and 2.4% said herbivores. However, most pet parents do not feel confident that they have enough knowledge to judge the impact of a vegan diet on their dog. Although the difference isn't

For those that have tried vegan dog food: How often does your dog get a vegan meal?

I feed my dog a plant-based or vegan meal regularly

18.3%

I've tried it a few times, but I've stopped

19.4%

More than 50% of my dog's meals are without any animal protein

41.7%

My dog is on a 100% vegan diet

20.6%

massive, more US and UK pet owners have greater confidence in their understanding of potential impacts than their French and Canadian counterparts.

Your diet becomes their diet

The overwhelming majority of people taking part in the survey have not fed their dogs a vegan or plant-based diet. Only 20.1% say they have done so. And those are mainly people who are already vegan or vegetarian themselves.

Reasons to go vegan

When asked why they had adopted a 100% vegan diet for dogs, the reasons were varied. 58% believe it's good for their health, while 41.7% point to the fact that it is good for the planet. 38% of respondents are vegan themselves, and another 30.6% indicate that their decision to opt for a vegan pet diet is due to their dog's allergies.

The vegan dog food consumer

The highest percentage of pet parents who have tried feeding their dogs a vegan or plant-based diet live in the UK or US and are generally younger people. More Canadian pet owners indicate that their dog is on a 100% vegan diet, compared to the other countries. Canadian and British dogs are more often on flexitarian diets, with higher percentages of pet parents feeding their dogs vegan meals.

What is the main reason why you prefer not to feed your dog a vegan diet?

I'm not convinced that it's good for my dog's health

52.7%

It's too expensive

10.9%

My dog loves meat/fish and wouldn't be happy without it

20.2%

Without meat or fish, it's not a complete diet

16.2%

Why not do it?

For the group that hasn't adopted a 100% vegan diet for their dogs, cost plays a very small role. Uncertainty about whether this type of diet is good for a dog's health is the main reason why 52.7% of pet parents do not switch to a vegan diet for their dog. Other reasons include a belief that their dog would miss meat and fish too much (20.2%) or that without meat or fish, the dog isn't getting a complete diet (16.2%).

Future vegan adopters

Just under half of the pet owners (45.9%) are willing to put their dogs on a vegan diet. The fact that this would be healthier is the main reason pet parents would be willing to switch, followed by a belief that it would be better for the planet.

Age and location play a significant role in the willingness of pet parents to adopt a vegan pet diet. Older generations and people living in the countryside are less open to feeding their pets that way. Of those who are open to switching, younger people are more likely to be convinced that it would be better for the planet, compared to older people. French pet owners have the strongest conviction that it wouldn't be good for their dog's health. And it is French and Canadians who are least likely to consider switching because it would be better for the planet.

► SEE NEXT PAGE

A large white dog, possibly a Golden Retriever, is lying on a green lawn. A small orange kitten is lying next to the dog's front paws. The background is a soft-focus green field.

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Convincing packaging

When buying vegan or plant-based dog food, packaging certainly affects respondents' decisions. 35.7% of pet owners look for proven health benefits of the specific product listed on the packaging. And 12.2% would grab the most attractive-looking one off the shelves, considering high-quality packaging a sign of a good product.

US pet parents care most about high-quality packaging that indicates a good product, while French consumers care less often about the proven health benefits listed on the packaging. There is also a generational difference. People under 34 years old are most likely to be concerned about the packaging. Pet parents up to 44 years old care more about proven health benefits than older generations.

Ingredients are important too

Another important element that influences a purchasing decision is the origin and quality of ingredients. 20.2% of pet parents state this is the most important aspect they look at when buying a product. Older generations and people living in the countryside care most about this. When reading the labels and nutritional information of vegan pet food, 55.9% of pet owners are looking to see if it's a complete food. 27% of people pay the most attention to protein content, while 17.7% value the vitamin content the highest. Americans care most about vitamin content, while French pet owners regard protein content as more important. Canadians are most interested in having a complete pet food.

Vegan and sustainable?

Whether the product or manufacturer has a low carbon footprint is much less important for pet parents when picking a product to buy.

Do pet parents believe that feeding dogs a vegan diet is a good solution to limiting our carbon footprint? While 42.8% feel that it would contribute to reducing this, 40.9% prefer to focus on reducing the carbon footprint

Why did you decide to feed your dog a vegan or plant-based diet?

Because I'm a vegan myself

38.9%

Because it's better for our planet

41.7%

Because my dog likes it a lot

13.9%

Because of the allergies my dog has

30.6%

I believe it's better for my dog's health

58.3%

in other ways. For 16.3% of pet owners, limiting their ecological footprint isn't important.

A higher percentage of US pet parents state that reducing your carbon footprint is not important, more than twice as high as French and UK pet owners. British consumers are more likely to be convinced that a vegan diet is a good solution, followed by the French. Older generations and people living in small towns and the countryside are more likely to prefer to reduce their carbon footprint in other ways, and fewer of them believe that vegan pet food is a good solution. ♦

A total of 998 pet owners from Canada, France, the UK and the US responded to the survey.

Special thanks to **Yummypets**



Philippe Vanderhoydonck
Managing Director
GlobalPETS

A close-up photograph of two cats, one grey tabby and one orange and white tabby, eating from a white bowl. The grey cat is on the left, with its mouth open and tongue out, eating a piece of food. The orange and white cat is on the right, also eating. The background is dark and out of focus.

Is a new era beckoning for meat analogs?

Interest in creating meat-like textures with plant proteins is on the rise again. Is there a place for next-generation meat analogs?

Meat analogs in pet foods are products that survive heat sterilization (canning) and mimic 'real' meat appearance and texture. Including meat analogs in pet food products can make the product stand out.

Mimicking steak

Starting around the 1960s, science and technology innovations saw accelerated development, patenting and industrialization of meat analogs. Steak could be mimicked using plant-based extrusion, and offal (kidney or liver) mimicked using hydrocolloid gelation of meat slurry. These innovations were both exciting and revolutionary in wet pet food evolution. But they became less popular with pet food premiumization and the demand for high meat content.

So, what does the future hold for the next generation of meat analogs?

Alternative proteins interest

Alternative protein innovation is a key area in human and animal nutrition, including pet food. Based on well-documented benefits around nutrition, sustainability

and animal welfare, ingredients like insect meal are starting to appear in dry pet food (8-12% moisture) as alternative proteins replacing conventional sources. In terms of structure, dry pet food (kibble) is not designed to mimic meat texture and has a relatively simple porous structure. Kibble structure is formed by extrusion processing of cereals and protein meals to create a starch-based matrix with meat protein inclusion.

By comparison, structurally wet pet food (70-80% moisture) is a more heterogeneous matrix. This is typically based on high meat content (as natural meats or heat-set chunks), hydrocolloid gels and thickeners. The low inclusion level of dry ingredients makes alternative proteins formulation more challenging, especially when their current market price is considered.

Opportunities

However, innovative plant-based meat analog technologies, including high moisture extrusion and shear cell technology, offer exciting opportunities for creating meat-like textures using alternative proteins. Innovative opportunities include the

development of flexitarian wet pet food (based on meats and plant-based meat analogs) and increased texture differentiation in vegan/vegetarian dog food. Combinations of different technologies and ingredient functionality also create further opportunities for innovative concepts, for example, shrimp analogs.

Keep it simple?

While there are many interesting meat analogs appearing in the human food sector, one area of concern is the use of food additives to create the desired organoleptic characteristics of real meat, namely, appearance, texture, juiciness, taste, aroma, etc. Could the use of these additives put off pet owners looking for 'clean label' products? Using meat analogs in a simple, 'clean label' pet food formulation might be more achievable and acceptable, given the differing organoleptic expectations of pet food and human food.

Exciting future!

Future implementation of next-generation meat analogs presents many challenges, including scale-

up, cost and pet owner attitudes towards their use. Marketing approaches are an important consideration, as alternative names like 'fake meat' and 'faux meat' might give the perception of cheap recipes to create low-cost fillers that detract from the intended benefits. Transparency is key – pet owners must know what meat analogs are and hear a convincing story about the benefits, including their use in human food.

When these challenges are overcome and marketing is tuned in an appropriate way, we might see a new era of meat analogs in wet pet food. I am excited about the future, are you? ♦



David Primrose

Petfood Consultant, Synergy Petfood
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Plant structure and nutrient bioaccessibility

While consuming plants has many advantages, understanding the processes involved in their digestion and nutrient bioaccessibility can be challenging.

Looking at plants' organs, each has different roles. Roots are rich in starch because energy is stored here. Seeds are filled with macronutrients to sustain the development of the future plant. These organs are made of different types of tissue systems and their cells have different shapes and wall properties – all defining the structure of the plant. It's the cell wall that is crucial for the interaction between plant cells and plants and microbes.

What is bioaccessibility?

Since all the nutrients are located inside the cell, their bioaccessibility and digestibility will be dependent on cell wall degradation or breakdown rate. Bio-accessibility is the amount of nutrients released from the complex food matrix in the digestive tract and available for digestion. Sometimes plant cell walls might be resistant to omnivore or carnivore digestive enzymes. Therefore, we refer to these indigestible parts of plants as dietary fiber in food.

Thus, to be digested and utilized by the (human or dog) digestive system, plants need to be processed by using mechanical force to decrease the particle or fiber size (milling) or by using heat (cooking) or fermentation. These processes will also inactivate the plant's anti-nutrients and increase food absorption and nutritional value.

The effect of structure

Properties of the plant cell walls that affect nutrient bioaccessibility and digestibility are solubility, viscosity, water holding capacity and fermentation. Along with the cell wall composition, the thickness and the pore size distribution will also determine how well the digestive enzymes penetrate these walls. Porosity varies between plants: for example, legumes have less porous cells than potatoes.

But actually, very little is known about the effect of plant structure on macro and micronutrient digestion and absorption. Scientists can use modern techniques to study the plant structure and correlate it with in vitro and in vivo data on nutrient bioaccessibility and digestibility to improve our understanding of the needed steps to increase plants' nutritional value for carnivores.

Meanwhile, what we do know very well is the health benefits of dietary fiber consumption: from regularity, fecal formation, and intestinal microbiota feeding, to chronic disease risk reduction – both for humans and for their companions. ♦



Jelena Šuran, DVM, PhD
CEO at ApiotiX Technologies

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The state of play in the raw food subscriptions market

A growing number of companies offer monthly door-to-door services for pet parents who are looking for biologically appropriate raw food. This segment has the potential to further consolidate its success in the coming years.

Despite still only representing a small part of the industry, biologically appropriate raw food (BARF) is increasingly attracting attention from pet owners who consider that this way of feeding has a positive nutritive impact on the well-being of their pets. A growing number of companies are active in this market segment with subscription-based services.

Home delivered

Raw & Fresh is an Australian direct-to-consumer (D2C) raw pet food supplier that offers a range of home-delivered raw meal options for pet parents. It is currently experiencing growing interest among pet owners who are looking for fresh, complete and balanced meals. "Our customers are generally pet owners who want the healthiest diet for their pets but don't have the time or desire to source the sometimes-difficult ingredients to make batches themselves at home," said the company's CEO, David Elliott.

In Switzerland, Babarf offers tailor-made BARF frozen meals. Customers can choose the weight, composition

(meat, bones, offal, fruits, vegetables and fish), size of pieces, and frequency of deliveries. The company, which only started producing at the end of 2019, doubled its revenue in 2021 and already serves several hundred customers. A monthly food subscription for a medium-sized dog (weighing around 15 kg) costs CHF190 (€181 / \$206), including personalized follow-up to ensure that the diet is successful and suitable for the animal. The brand is primarily targeting owners whose dogs have allergic disorders and digestive problems, as well as customers who want to avoid processed products. "Overall, this is part of a return to nature and healthy products," said Director Morgane Dufaux.

German brand Bello & Friends offers ready-made BARF boxes for dogs. Customers just need to select a small or big meal, depending on the weight of their pet. "They don't have to choose the food; we take care of that, so it is useful for them," pointed out General Director Marius Lejnowski. Most of the clients are health-conscious pet owners who want to take care of their dog's health too, and who

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can afford to spend a bit more on this kind of food. A subscription can cost up to €150 (\$168) per month.

In the US, Maev offers pet parents the option of personalizing raw food for their dogs based on four wellness goals: weight & digestion, anxiety & mental health, hair & skin, and hip & joint. The subscription service of the Austin-based company, which was launched in 2020, is mainly used by dog owners who are intently focused on the latest health and wellness trends that will enhance their quality of life – including by keeping their pets healthy.

More customers

For Raw & Fresh CEO David Elliott, BARF is becoming a “default choice” for some pet owners looking to give their pets the healthiest lives. The company has seen significant growth in customer numbers, partly thanks to the increase in the nation’s dog population. According to Animal Medicines Australia, dog owners increased from 5.1 million in 2019 to 6.3 million in 2021. “We have also seen an increase in pet owners wanting the convenience and safety of having their supplies delivered to their home instead of venturing out to the stores,” he added. Whereas the company’s annual growth rate was 45% between 2018 and 2020, in the period from 2020 to 2022 sales increased by 125%.

Similarly, Bello & Friends in Germany increased its customer base by 40% in the last 2 years, with new clients signing up every month. The company currently has around 2,000 regular customers subscribed to its monthly BARF food service.

And far from stopping there, some players predict that BARF will significantly contribute to the fastest-growing segment of D2C fresh pet food. “We envision that demand will be led by an increase in consumers questioning what’s better for their pets – which is often the reason why they are looking for alternatives

in the first place – rather than by premium and higher-quality products,” said Morgane Dufaux from Babarf.

Marius Lejnowski from Bello & Friends expects that the segment will increase in the near future but it will not experience substantial growth. “Most people are looking for cheap food,” he concluded. According to him, two of the main challenges facing the sector in the coming years are the less costly ways of feeding pets and the fact that some companies are offering product ranges that lack vitamins and minerals.

Markets to watch

The market share of BARF varies from one country to another – the figure can be as high as 10-15% in the markets where the concept is more popular – and the success is expected to be further consolidated in the near future in some regions.

For example, sales of BARF food in the Nordic European countries are increasing. The volume share in the segment currently represents 5% in Finland and 6% in Sweden, according to local player Snellman Pet Food-MUSH. “We’re seeing more and more frozen products on sale in grocery stores and this will lift the BARF segment to over 10% of the market. Over time, we could go up to 15%,” said Company Director Magnus Pettersson, who largely attributes this increase to word-of-mouth between pet owners.

In South-Eastern Europe, regional players believe that the segment currently represents less than 1% of the pet food market. “It is still too premature for small local producers to be able to sustain if they are to provide high-quality food and service,” commented Emil Chomonev from BARF Natural Foods Bulgaria. Although growth of the BARF market has stalled in Romania, it is expanding rapidly in Cyprus and Bulgaria and is also still growing in Greece, despite that being a mature market.

The success of this segment is also linked to some challenges that the industry needs to face. According to Chomonev, producers can never compete with the industry when it comes to quantities. "There will be a moment in the markets when the demand will outperform the supply," he cautioned.

Nutritional or marketing benefits?

The BARF diet consists of different types of raw food, including fresh, uncooked meat, bones, fruits, vegetables, herbs, dairy, whole grains, minerals and supplements. But does it really help pets to have a better life? Marge Chandler, an independent consultant in small animal nutrition, believes that there are some misperceptions about pet nutrition with raw food. "Feeding a BARF diet has a marketing appeal rather than nutritional benefits," she said in an interview with GlobalPETS.

When asked about the advantages of a BARF diet for pets compared with other types of food, Chandler replied that "it is neither better nor safer" and highlighted that there are no scientifically proven benefits. "There are anecdotes both for and against these diets, but the plural of 'anecdote' is not 'data'," she said. The term 'natural', which is often linked to the BARF diet, "does not necessarily result in a better diet, or even a complete diet," she stated. Furthermore, she pointed out that although there is guidance, there are no regulations at a European level on the use of this word on labeling. ♦



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How can raw meat for dogs remain sustainable in the future?

Some ecologists decry the damaging impact of cattle farming – and therefore beef – on the planet, whereas others hail it as a savior. Who is right?

Modern industrial agriculture, including typical beef production, currently makes a significant contribution to global warming (GW). But the good news is that it does not need to. Cows can actually be part of the solution to feeding the world and reversing GW. Indeed, research suggests that they are fundamental to sustainable agriculture for the future of humankind.

Greenhouse gas emissions

Modern farming involves feeding a lot of grain and soy to cattle for beef and dairy production. The animals are typically turned out to graze for weeks, depleting the land of nutrients and trampling any chance of flourishing ecosystems. Meanwhile, corn-heavy and grain-heavy feeding results in high greenhouse gas (GHG) emission levels.

However, in her excellent 2021 book called *Defending Beef*, Nicolette Hahn Niman argues that there are more significant sources of greenhouse gasses. These include the fossil fuels needed to grow the corn and grain as feed, the artificial fertilizers required for high yields, and the transportation of feed over long distances to the cattle farms. This is especially the case in the US, but the situation is similar in Europe.

What about the benefits?

Allowing cows to roam freely on pastures, consuming a diet of grass and forage to which they are biologically adapted, helps to retain carbon and nutrients in local ecosystems. Moreover, cattle convert a resource humans cannot otherwise use – grass – into beneficial products.

In his entertaining and enlightening 2012 book called *Folks, This Ain't Normal*, Joel Salatin, the US-based regenerative farming guru, explains that the health and volume of soil worldwide can be enhanced by mimicking the roaming herds of cattle found in prehistoric times. This ancient system also encourages myriad ecologies.

Cows and the climate

Both authors agree that well-managed cattle and small, local, mixed animal/arable farms are the only way to avoid complete erosion of our topsoil caused by industrial agriculture. Indeed, grass grazed by cattle in carefully managed 2-3 day rotations within electrically fenced-off areas on a larger field, has been shown to turn grass into a vast, powerful fixer of atmospheric carbon. See Joel Salatin's TedX talk entitled 'Cows, Carbon and Climate' for more details.



The authors also agree that grass-fed cattle produce less methane than industrially raised animals. Additionally, they point out that gasses from our bovine friends are insignificant (in greenhouse terms) compared to petrochemical emissions from fertilizer factories. When a factory-made artificial nitrogen, phosphorus and potassium (NPK) fertilizer is applied to vast industrial mono-crops like corn, wheat and soy, nitrous oxide (NO) is produced. NO is 10 times more active as a greenhouse gas than methane from cattle, and it also remains in the atmosphere for longer.

Cattle hold the key to the future

In her 2009 opus called *The Vegetarian Myth*, the poetic yet strident nutrition researcher Lierre Keith supports Salatin's and Hahn Niman's thoughts on how essential beef is to the future planet. She argues vegetarianism is not the answer to feeding the world. All three influential writers agree: well-managed beef production is crucial for a healthy tomorrow.

In fact, cattle are not only vital as a source of beef products to feed us and our pets, but they are also essential in stopping millions of tons of soil from drying up and blowing away due to devastating modern farming practices. And once the soil is gone, it's not coming back. Therefore, cows are the lynchpin of well-managed, small, local farms to feed the world. These farms – and the cattle on them – hold the key to the future for us all! ♦



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Keto diets as pet food: dangerous or beneficial?

Can low carb, high fat ketogenic diets, popular among humans, be used in pet nutrition?



Two basic types of ketogenic diets exist: a ketogenic diet based on long-chain triglycerides (LCT) and a ketogenic diet based on medium-chain triglycerides (MCT). Currently, the MCT diet is the only one implemented in veterinary medicine while the use of the LCT diet is described anecdotally and is currently not backed up by an extensive body of evidence.

Tumor research

The use of the LCT ketogenic diet in humans has been extensively studied in tumor research. Studies indicate that tumor cells have increased glucose consumption, most likely due to mitochondrial dysfunction. Therefore, dietary changes, such as the ketogenic high-fat LCT diet, which induces oxidative metabolism, and limits glucose consumption, represent a possible nutritional approach for inhibition of tumor growth.

Like master, not like pet

The metabolic pathway of ketone bodies is well known: free fatty acids are metabolized in the liver to ketone bodies acetoacetate, β -hydroxybutyrate and acetone. Ketone bodies are further transported to various tissues and used as energy sources. Although metabolic pathways are similar, we must be aware that humans and pets are quite different when it comes to energy utilization, as there are marked metabolic differences between these species.

In dogs, in contrast to humans, a significant increase of ketone bodies in the blood does not lead to marked ketosis even after long-term fasting. Moreover, the

concentration of ketone bodies is at least 10 times higher in humans than in dogs after fasting. These data suggests that dogs utilize ketone bodies far more efficiently than humans.

Cats, as obligate carnivorous species, are known to have high protein requirements and are sensitive to hepatic lipidosis development during marked increase in fatty acids oxidation. They are, therefore, a species where a high-fat LCT diet could lead to significant health risks when amino acid and gluconeogenic capacity is not met. Additionally, cats, like dogs, are thought to possess effective mechanisms for ketone bodies utilization, and a state of ketosis is not easily achieved.

Not without risk

The use of a ketogenic diet in dogs and cats, as nutritional management during treatment or recovery in tumor patients, has not been described in existing veterinary scientific literature. Therefore, it is presumptive to claim that the use of an LCT ketogenic diet is without risk.

According to existing guidelines, a dietary plan for small animal oncology patients should include an individually adapted nutrition plan, with the consideration of clinical symptoms, prognosis and concurrent pathologies. Tumors in dogs and cats often lead to changes in food intake and nutritional status, so oncology patients should receive individually tailored nutritional support to minimize chemotherapy side effects.



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Potential uses

Contrary to the use of the LCT ketogenic diet in oncology patients, the use of the MCT diet in epileptic dogs provided promising results. Ketosis has neuroprotective and anticonvulsant activity, and the research has shown that alterations in neuronal metabolism and neurotransmitter function in ketosis could be beneficial.

Namely, it was found that the frequency of seizures is significantly lower in dogs fed the MCT diet. The ketogenic MCT diet is designed to improve the shortcomings of the classic LCT diet. The fatty acids used in MCT are caprylic and capric acid, and to a lesser extent caproic and lauric acid.

The MCT diet, unlike the LCT diet, is not based on macronutrient ratios but on the concentration of medium-chain fatty acids that are able to derive ketone bodies. The main advantage of the MCT diet is better absorption and faster transport of fatty acids to the liver, avoiding the thoracic duct and chylomicrons formation, resulting in faster β -oxidation and the formation of ketone bodies.

The MCT ketogenic diet requires less fat to achieve a beneficial concentration of ketone bodies: just 10% of energy must be supplied through MCT. A lower proportion of fat and thus a higher proportion of protein and carbohydrates in the diet contributes to better palatability and minimizes the risk of pancreatitis or hepatic lipidosis contrary to a high-fat LCT ketogenic diet. ♦



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Why krill is the new star in the omega-3 pet supplement space



Antarctic krill offers multiple benefits, making it an increasingly popular option – not only in pet food, but also in supplements.

Antarctic krill is an increasingly popular option in pet food as it offers multiple benefits. The same can be said for its role in supplements.

When diet just isn't enough

Sufficient omega-3 levels are essential for health, but – like humans – pets cannot produce omega-3s on their own, and sometimes diet just isn't enough. In that case, supplementation is necessary and krill oil is an excellent option for humans and pets alike.

A super supplement for pets

Not all omega-3s are equal. Krill is made up of a powerful combo of nutrients and, unlike other omega-3 options, it provides long-chain omega-3s (EPA and DHA) mainly in the form of phospholipids. Phospholipids are unique in that they are water-soluble, allowing easy integration into the vital organs where they are needed the most. Krill is also naturally rich in choline and astaxanthin. Choline is essential for a healthy liver and important for brain and muscle health. Meanwhile, astaxanthin is an antioxidant and natural protectant. Just like vitamin E, it helps to boost a pet's immune system, but is a hundred times more effective.

Innovation possibilities

Pets can enjoy the benefits of two unique krill oil products:

- Antarctic Phospholipid Oil is rich in easily utilized marine phospholipid omega-3 (EPA and DHA), choline and the antioxidant astaxanthin.

- AstaOmega Oil offers a natural combination of marine triglyceride omega-3s and high levels of astaxanthin.

As unique and superior ingredients, both QRILL Pet Antarctic Phospholipid Oil and AstaOmega Oil provide several health benefits and can be used as stand-alone products or as ingredients for innovation purposes.

Superior and sustainable

Consumers continue to seek out krill oil to support their overall health and well-being, and numerous studies document the health benefits and efficiency of krill oil in humans. The same can be said for krill oil in pets.

And while it's clear that the health benefits are endless, the health of the planet is also an important topic. Krill is considered one of the most sustainable sources of marine omega-3s. All of Aker BioMarine's QRILL Pet ingredients carry Marine Stewardship Council (MSC) certification, the highest-ranking sustainability certificate available. Furthermore, as the world's most sustainable reduction fishery, the Antarctic Krill Fishery has received an 'A' rating from the Sustainable Fisheries Partnership for the past 7 years. ♦



Andreas Ziener

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Utilizing psychobiotics to improve pet mood



Dealing with a pet with separation anxiety, fear of storms or other behavioral issues is never fun for an owner. Thankfully, solutions are starting to emerge to improve pet mood.

Nutritional scientists believe that good health starts in the gut. This is because the gut is the first point of health impact for all items ingested by a pet. Once in the gut, the animal's body begins to react to those substances. Importantly, what happens in the gut does not stay localized to the gut. For example, since 70% of the lymph tissue is associated with the gut, the body's immune system is highly influenced by gut events.

Gut-brain axis

Likewise, there is an association between the gut and the brain which has been termed the 'gut-brain axis'. Cells that line the gut 'sample' what is occurring inside the gut (or lumen) and send signals back to the brain. This occurs indirectly through the production of hormones or directly through the vagal nerve which connects the gut to the brain. This ongoing gut sampling and signaling phenomenon thus affects brain perception.

Examples in humans

A need to understand ways to address mood and psychological addiction in humans has arisen because people struggle with depression, undergo recovery from drug addiction and experience cognitive decline with aging, for instance. As a result, academic research into how to favorably affect brain function has

accelerated. This research has produced insights into what have been termed 'psychobiotics'.

The term psychobiotics usually relates to a group of probiotics that are orally ingested and then result in some effect on the brain. However, other gut-active dietary components (e.g. prebiotics, postbiotics) have also been lumped into this category. As one example, a clinical study in humans demonstrated a blend of probiotics that improved 'sad mood'. Other examples in humans involve certain strains of lactobacilli having been shown to lessen anxiety or improve cognition and reduce cortisol, which is a stress hormone.

Microbiota composition in dogs

Dysbiosis, i.e. an abnormal/unhealthy composition of intestinal microbiota, has been associated with neuropsychiatric diseases in humans. Dysbiosis of the gut in dogs has also been described and, to date, has been associated with gut inflammation. Differences in microbiota composition have been shown in dogs of varying behavioral types. Since aggressive dogs have been shown to express significantly different microbiota compositions from phobic or normal dogs, it could be concluded that the composition of intestinal microbiota may influence mood and behavior in dogs.

Naturally prebiotic!

Bifidobacterium longum (*B. longum*) is one probiotic that has been studied for its effects on various brain-related disorders. In humans, *B. longum* has been shown to: 1) improve cognition in Alzheimer's patients, 2) improve sleep during periods of stress, and 3) be associated with reduced stress and anxiety when present in the gut. Recently, Nestlé Purina has promoted a 'calming' supplement containing *B. longum* for dogs and cats. Interestingly, it is purported that the mechanism for why this happens is through the vagal nerve, which communicates between the gut and the brain. *B. longum* may also impact tryptophan levels in the body, a precursor to a neurotransmitter involved with the gut-brain axis.

Probiotics are not the only means to affect behavior through the biotics route. Researchers have shown that feeding a postbiotic consisting of inactivated *L. fermentum* and *L. delbruekii* was able to improve sociability in mice and to lower stress hormones. This change was explained by subtle shifts in the gut microbiota.

Growing evidence

In sum, the evidence for the use of psychobiotics in humans to improve brain function (e.g. cognition, mood, sleep, etc.) by impacting gut-level events as well as communication mechanisms to the brain, is rapidly growing. Early evidence in dogs confirms gut microbiota changes between aggressive and phobic or normal-behavior dogs. As such, it is reasonable to consider the role of psychobiotics in impacting gut-level events that could improve brain function in dogs and cats. Various large pet product manufacturers are already taking advantage of these findings. Is your company? ♦



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Johnson Petfoods is a Dutch family-owned company specialized in the import/export and distribution of pet food and snacks. From its own warehouse, the company delivers directly to pet shops in the Netherlands and Belgium.

In recent years, however, it focused on the development of products under its own Private Labels. A good example is the Riverwood brand. Under this label, Johnson Petfoods has built up a complete portfolio of dog and cat foods including an extensive snack line. The latest development is a high-quality range of wet foods.

Under the name Riverwood 'Caviar for Cats' the company will be presenting a range of 14 delicious recipes to its international distributors at the Interzoo tradeshow in Nuremberg.

Interzoo 2022 – Hall 7A, Booth 421

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DOES LICKING MEAN LIKING?

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Trend Alert

Probiotics for dogs and cats

How popular are probiotics for pets among consumers?
And how has demand evolved over the past few years?

With the increased focus on health in general, consumers are also paying more attention to the digestive health of their pets. This article examines the importance of the pet probiotics category and looks more closely at the growth prospects.

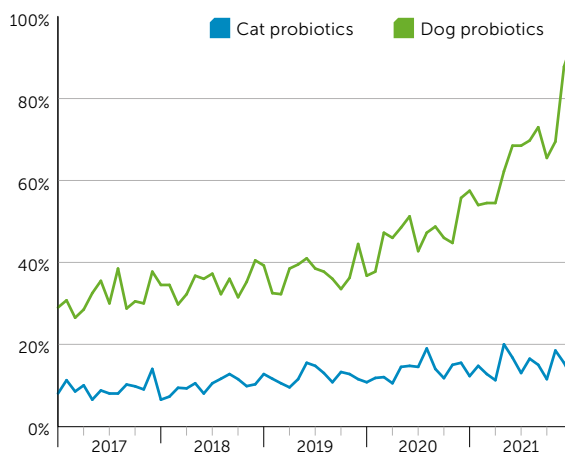
What the Google search data shows

Data from Google shows that while demand for probiotics for humans has stabilized over the last 5 years, dog and cat probiotics are gathering steam. In 2021, search volume had more than doubled for cat and dog probiotics compared to 5 years ago.

Dogs have traditionally consumed the most supplements in the pet industry, and probiotics are no exception. More than 3 times as many searches are performed for dog probiotics compared to cat probiotics.

Consumers from the US search for pet probiotics the most, followed by Canada. The UK, Australia and Singapore are also interested in pet probiotics, conducting roughly half the number of searches compared to the US.

Relative Google search volume



How about Amazon?

On Amazon, there is a similar pattern. The Amazon search data accessed by GlobalPETS indicates that the number of searches for dog probiotics has tripled in the last 3 years, while search volume for cat probiotics is estimated to have doubled in the same period.

► SEE NEXT PAGE

The data also indicates that consumers look for dog probiotics 5 times more often than cat probiotics, which confirms that dog probiotics are more popular than cat probiotics.

Most popular formats

Looking at the products carried by the major pet supplies retailers (including Amazon) in this category, the best-selling type of probiotic supplements is (soft) chews, especially in the US. For example, 6 out of the top 10 probiotic supplements on Amazon US are chews. This compares with 4 out of 10 on Amazon UK, and 3 out of 10 in Canada. Powders that can serve as a meal topper are the second most popular format for dog probiotics.

What about food products?

While there are many pet food products that contain probiotics, they are rarely the main factor mentioned on the packaging or in the marketing materials. Instead, the promotion of pet food products tends to focus much more on digestive health and sensitive stomachs. Therefore, there could be an opportunity to capture the attention of consumers who are actively looking for pet food products containing probiotics by clearly communicating their presence on your packaging.

Size of the pet probiotic supplements market

While the Amazon data does not paint a full picture of the total market size, the estimated sales data from the e-commerce giant's platform does shed some light on the popularity of probiotic products.

The top 3 probiotic supplements for dogs are each selling between \$1.5 million (€1.3M) and \$4.5 million (€4M) worth of product per month in the US alone. In the UK, the most popular dog probiotic supplements are selling at a rate of around £0.5 million (\$0.7M / €0.6M) per month. In contrast, the top-selling probiotic supplements for cats are each estimated to generate closer to around \$0.5 million (€0.4M) per month in the US and much less in other markets.

M&A activity

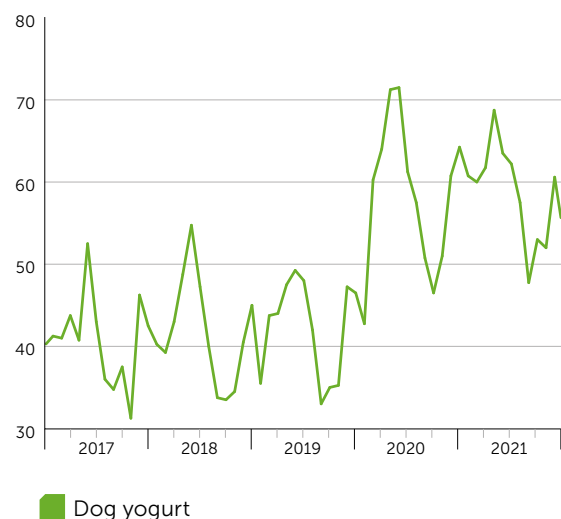
Investors are also keenly interested in getting a slice of the action, both in the probiotics space and in pet supplements generally. Zesty Paws, a pet supplement brand with more than \$100 million (€88M) in revenue and one of the best-selling dog probiotics on Amazon,

was sold for \$610 million (€537M) to H&H Group in September 2021. Meanwhile, Vestar Capital acquired a majority stake in PetHonesty for an undisclosed amount in July 2021, FoodScience added Pet Naturals to its portfolio through an acquisition in 2021, and Swedencare acquired NaturVet for \$447.5 million (€394M) in February 2022.

Dog yogurt

Yogurt is one popular human food product that contains lots of probiotics. In view of the humanization trend, perhaps it should come as no surprise that multiple 'dog yogurt' products are available on the market. Irrespective of whether yogurt is actually effective as a probiotic supplement for dogs, let's focus on what the consumer data tells us. Are dog yogurts a step too far or are they catching on?

Relative Google search volume



Over the past 5 years, consumers have searched increasingly often for dog yogurt (apart from a dip in recent months). On average, there has been a 37.5% rise in interest, so there is clearly a place for these products in the market. Having said that, this is a nascent niche and the search volumes are currently still much lower than for 'probiotics for dogs'. ♦



Philippe Vanderhoydonck
Managing Director
GlobalPETS



Benelux

How has the Benelux pet industry evolved since our last update? What was the impact of COVID? And what about the local retailers? Tom&Co and Discus share how they're doing, what they're planning and they share insights into the Benelux consumers.

The path to differentiation for Belgian retailer Tom&Co	32	Laroy Group <small>BELGIUM</small>	39
The pet industry in the Benelux: an update	34	How one Dutch pet retailer approaches the market differently	41



The path to differentiation for Belgian retailer Tom&Co

Finding the right retail concept for each individual market is set to be the key to future growth at Tom&Co.

Tom&Co has a chain of pet stores across Belgium, France and Luxembourg. Its strategy is based on growth via organic expansion, acquisition and differentiation.

At present, the company has 175 stores trading across the 3 countries. It is already a market leader in Belgium, where the brand is well known and popular. It intends to capitalize on that brand awareness, and develop it elsewhere by identifying the right concept for each market.

Store differentiation

Maud Leschevin, Chief Operating Officer, gives an indication of Tom&Co's ambition: "to increase the number of shops to 250 by 2026". Much of this growth will take place in France, where the company plans to buy smaller chains and to open around 10 new stores every year. In Belgium, 2 new stores will be opened each year, mainly in the Flemish region, while existing stores will be remodeled.

Leschevin says: "We are trying to grow organically in different stores in the same region. We see several opportunities in the way we operate. For example, by taking one destination store, and testing more of them as well as more service stores, with some differentiation between them."

Tom&Co is planning to roll out destination stores based in retail parks where there is a large assortment of products and services, along with franchising stores. This enables it to adapt its stores to local needs and customer requirements, as well as to motivate retail teams.

Brick-and-mortar vs online

Tom&Co currently has a top position in the traditional store sector, but has not yet achieved that online. The company began developing an omnichannel strategy 2 years ago and aims to accelerate this during 2022.

"We are going to become more aggressive online in both food and non-food," states Maud Leschevin.

A click&collect system will be implemented by the end of 2022, as well as a 2-hour same-day home delivery service, either from a store – if the product is available – or from the central warehouse. These omnichannel services will evolve gradually, depending on the market, with home delivery from the warehouse set to reach 10% by 2026.

Store involvement will remain crucial, as Leschevin explains: "We don't want to cannibalize sales from our stores to online. A large part will still be via the stores, using convenient digital solutions like click&collect."

Double-digit growth

Tom&Co has experienced double-digit growth over the past 3 years. Sales have been increasing steadily. 2021 proved to be a record year, with more than €260 million (\$295M) in revenue, and a 10% increase in sales.

Leschevin says that this growth comes from a 6% increase in transactions and a 3% increase in basket size. Customers have been buying 6% more products, although at a slightly lower price point.

This was particularly evident over the Christmas period, when sales of toys and snacks increased, but sales of higher-priced cushions slowed down. In Belgium, the market is growing both in terms of volume and value, with pet specialty stores taking a greater share of sales from grocery stores. Much of this growth is being fueled by an increase in the number of pets per household, as well as in demand for the quality product ranges which can be obtained from specialist pet outlets.

Customer-focused products

In terms of the product range on offer, Tom&Co analyzes the customer platform carefully to identify what people are looking for, and then develops suitable products and services. Exclusive private labels are being used to adopt a much more segmented approach, rather than copycat brands offering better prices.

The company has developed 5 private label brands, either in-house or via an exclusivity agreement with small market brands. This covers 7,000 products in all. One of the more unusual market sectors to be identified was the insect market.

Leschevin comments: "This is a small market, but we have a new private insect label through an exclusive agreement." The intention is to test the waters in the market, but Tom&Co is not likely to launch an own brand for this kind of food within the next 2 years.



Looking at other product ranges, Tom&Co believes that consumers are ready to pay more for quality, since they are conscious of the impact good-quality food has on their pets. One example of this is increased demand from Belgian consumers for specific products to tackle obesity and other health-related issues. Consumers are also seeking greater transparency about the degree of local sourcing, together with information on the amount of sugar and meat in a product. This emphasis on local origin has been a key trend for the past 2 years, as the pressures of COVID-19 led to consumers wanting to buy products sourced within their own country.

Retail concept for the future

As to the future, Tom&Co intends to prioritize its focus on natural, premium and functional foods, plus the provision of vet services within stores, to create a more differentiated offer. The intention is to offer a complete service based on value, pet well-being and advice, with well-trained staff who can sell higher-priced products. This is a retail proposition that needs to continually evolve, while adapting to local needs. It will focus in particular on growth within France on a regional basis.

Having proved its resilience over the past 2 years, Tom&Co believes it has a recipe for long-term success. Its ambition is to create a concept tailored to the consumer and the local market, combining both store-based retail and online to build a comprehensive omnichannel retail business. ♦



David Palacios Rubio
Editorial Manager
GlobalPETS

The pet industry in the Benelux: an update



How is the pet industry doing in Belgium and the Netherlands? How has it been affected by COVID-19?

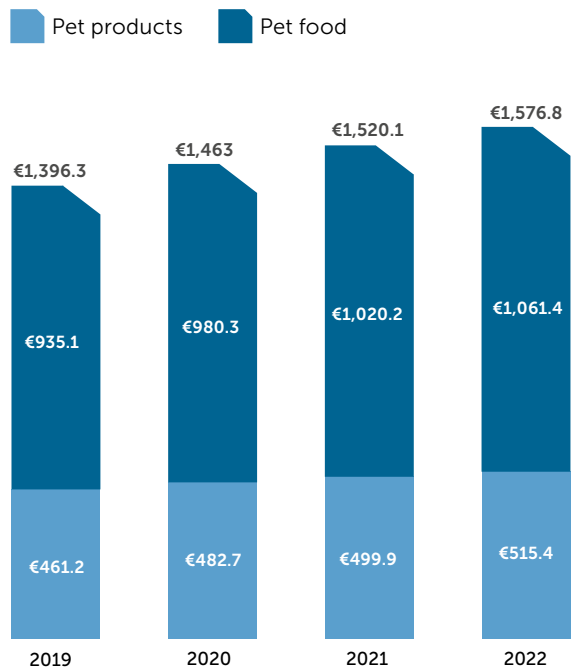
Almost half of the households in the Netherlands own 1 or more pets. The latest results from a survey conducted by I&O Research show that in 2021 a quarter of Dutch households owned 1 or more cats. Dogs come in second: 18% of Dutch households own a dog.

A Belgian Ivox survey confirms that we all love pets more than ever, with 52% of Belgian families owning at least 1 pet. Most owners are young families with children (64%). Yet, remarkably, the average owner has not 1, not 2, but 3 pets. This could be anything from fish or parakeets to tarantulas or ferrets. Cats and dogs are still the most popular, with 1 in 3 families in Belgium (31%) owning a cat, and almost a quarter (23.6%) owning a dog.

The COVID effect on pet ownership

In the Benelux countries, as in other regions, there has been a rise in the total number of pets since the start of the pandemic. Pets provide comfort, support and companionship in difficult times, and people have been able to spend more time caring for them while working and staying at home.

Pet care market sizes in The Netherlands (mln)



Source: Euromonitor



SMART SAMPLING SOLUTIONS



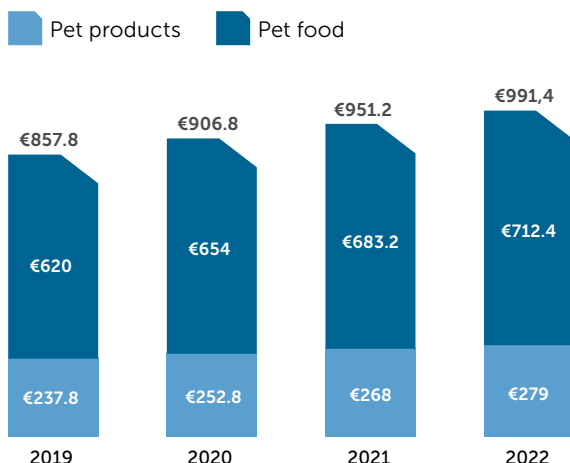
Dutch studies show that attitudes to pet ownership have changed positively for 1 in 5 consumers as a result of the COVID pandemic. For example, 8% of Dutch households acquired a pet during the first year of the pandemic (in 2019 this was just 6.4%). Although lack of time remains the most frequently mentioned reason for not having pets, this has been said less since the COVID crisis began.

The pandemic has also had a positive effect on pet ownership in Belgium: 11.6% of Belgian households welcomed a new pet during the first year of the pandemic, and a quarter of them (25%) did so very much because of the pandemic.

Pets in the office?

While the NVG and BEPEFA trade associations are delighted about the increase in pet ownership, they wonder what will happen after the pandemic, and urge pet owners to continue caring for their faithful companions as everything gradually returns to normal. While 7 out of 10 pet owners in the Benelux would like to take their pets to the office, only 1 in 10 companies allows this currently.

Pet care market sizes in Belgium (mln)



Source: Euromonitor

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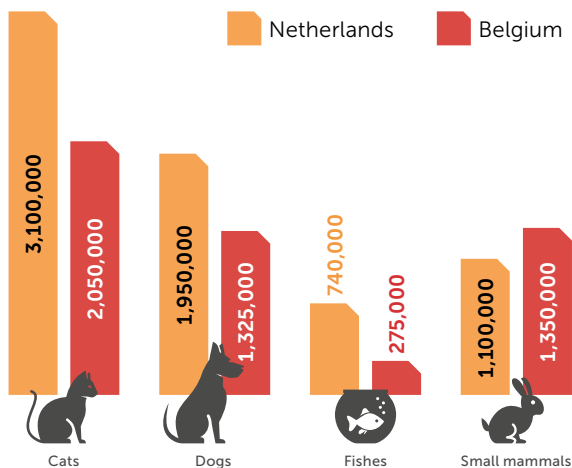
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Pet population in the Netherlands and Belgium



Source: Fediaf

COVID challenges for Benelux companies

The pandemic has also affected the pet food industry in the Benelux, as in other parts of the world. Despite some early challenges with the availability of ingredients, as well as the need to keep employees healthy and safe, the sector successfully stayed on top of its game during hectic times. Thankfully, there were no major issues, and pets in the Benelux were able to enjoy their pet food as usual.

Trends in the sector

The field of nutrition is moving at a fast pace, and pet food products are constantly evolving. There have been dramatic changes over the years, progressing from basic pet food that provides the right nutrients in the right quantities to more sophisticated food with functional ingredients that have special nutritional benefits.

When it comes to caring for pets, a survey conducted for BEPEFA by Ivox shows that choosing pet food keeps 86% of pet owners busy, and almost three-quarters (74%) of them agree that 'only the best is good enough'. 80% of dog and cat owners consider the quality of pet food to be just as important as the quality of their own



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food, and 51% say they're often more concerned about the health of their pet than about their own health.

The humanization of pets is a key trend driving the Benelux pet food market. Many pet owners seek pet food that not only reflects their own tastes, but also fits with their own lifestyle choices. Owners also want to feed their pets in an environmentally friendly way, so sustainable raw materials, environmentally friendly production, and recyclable packaging materials are important factors when choosing pet food. ♦



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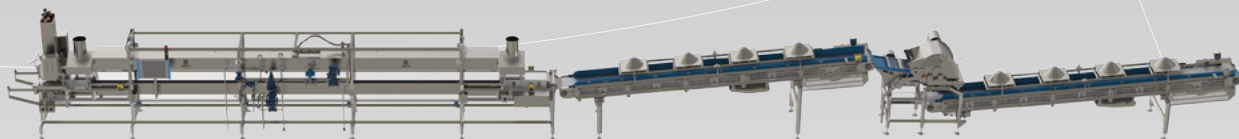
Anuga Foodtec, 26 – 29 April, Hall 10.1, stand E 70 / F79, Köln, Germany

IFFA, 14 – 19 May, Hall 9.1 stand E51, Frankfurt, Germany

Pet Food Forum Kansas, 2 – 4 May, Booth 2915, Kansas City, USA

Pet Food Forum Europe, 23 May, Nürnberg, Germany

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Laroy Group BELGIUM

A year full of change

As it rapidly expands, Laroy Group is busy investing: in new warehouses, production capacity and sustainability. 2022 will also bring lots of novelty to its product range, and extra focus on customer service.

Laroy Group has some major building works planned for the near future. The oldest warehouses on the Wondelgem site will be demolished and replaced by brand new ones. These are to be built according to the latest insights – an investment of €5 million (\$5.7M). The new warehouses will be operational by the end of 2022.

Major investments

The company is also investing in ultra-modern equipment, employee well-being and further automation. For example, all employees have now moved into new offices. At Witte Molen – the compound feed manufacturer that makes a substantial contribution to the Group's growth – €1.5 million (\$1.7M) has been invested in updating production facilities. Witte Molen PUUR will continue its international expansion, and has redesigned the Country range into a modern nostalgic line that will touch shoppers' hearts.

To be able to deal with a larger customer base, while still providing a fast, correct and personal service, the Group is currently investing in a so-called 'omnichannel customer service platform'. All employees are connected to this platform, so together they can handle customer questions as quickly as possible.

Focus on sustainability

Sustainable entrepreneurship is an essential theme for the company. That's why the duvoplus brand was recently given a new look with a reduction in packaging in mind. In the coming year, the company is making investments in electric charging stations and an expansion of the electric vehicle fleet. It is also working on a closer-to-home purchasing strategy in 2022.

Turning all blue

Increased growth also means range renewal at the company's 'house of brands'.

The world-famous Belgian Smurfs and Laroy Group have 'smurfed together' to develop a striking line of pet products. As its exclusive partner in the pet sector, the company is very proud of this collaboration with the popular blue characters, which emphasizes the family business' local connection and values.

Trade fair presence

After the success of Zoomark in Bologna, Laroy Group is looking forward to the upcoming physical trade fairs. With an enthusiastic team, a wide range of products and a lifelike Smurfette, the company hopes to welcome its customers at Interzoo in Nürnberg on 24 and 27 May 2022. ♦

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How one Dutch pet retailer approaches the market differently

It started as a group of 6 entrepreneurs getting together to discuss business and purchase collectively for better deals. Discus Netherlands has since become one of the key retail players in the local pet industry.

Discus has a slightly different model than the typical retailer. No franchisees, no own stores, only independent entrepreneurs that operate a total of 83 pet stores across the Netherlands.

Local heroes

The entrepreneurs are core to how Discus tries to differentiate itself. "Our entrepreneurs are the 'local heroes'. They're the experts and the familiar face for consumers in their area. They know which products work for their customers, and which don't," says Bert de Jonge, CEO of Discus Netherlands.

While people have been saying for years that smaller stores will gradually disappear, De Jonge sees it differently. These local entrepreneurs are what makes Discus special. And he points out that COVID made it clear to all that 'local heroes' will remain an important part of the retail landscape.

Collective vs individual preferences

Discus steers clear of competing on price. If a certain product is offered at very low prices online, Discus often doesn't carry that item at all. "Instead, we focus

on education, a unique product offering, and good service to make the price much less of a factor for consumers," De Jonge explains.

The Discus model also warrants this approach. As a collective of entrepreneurs, being margin-driven is the best way to offer an interesting value proposition to its members.

How does Discus pursue a unique product offering? Discus Netherlands, as the service organization supporting the independent Discus entrepreneurs, makes agreements with preferred suppliers. At the end of the day, it is up to each individual entrepreneur to decide which products they want to buy and sell, based on their intimate knowledge of their customers' preferences. So they make their own choices in assortment within the collective agreements.

Importance of private labels

The Discus private label products also contribute to its unique product offering. And this is clearly a growing category. The Total Bite brand, for example, is one of its top sellers.

[▶ SEE NEXT PAGE](#)

De Jonge believes that these private label and own brands will play an even bigger role in future.

He explains: "Our private label products serve as a flywheel. The more they sell, the better the purchasing agreements we can negotiate, and the higher the margins can be while keeping the prices attractive for consumers."

Pet specialty's strengths

For many pet specialty retailers, driving supermarket buyers to the specialty channel is an opportunity for growth. In the Netherlands, for example, 65-70% of cat owners buy pet food in supermarkets. While De Jonge agrees that this provides an opportunity, he does see it as an interesting challenge:

"The average consumer who buys in a supermarket considers the products they find there to be the 'top brands'. They've seen them on national TV, which makes them think that these products must be really good. So the question is 'How do you explain to people that while those products are good, there might be more suitable products for their own pet'."

For De Jonge, the humanization of pets offers a bigger opportunity for growth. Pet specialty's strengths are knowledge, service and a unique product offering. Consumers need all this to make educated decisions and give their pets the best of the best. Which is exactly why Discus is focusing on these 3 pillars.

Collaborating on sustainability

The pet industry is increasingly looking for more sustainable alternatives, and Discus is no exception. It's working hard to provide products like these for its customers, but De Jonge would like to see closer collaboration within the whole supply chain to achieve more.



"From suppliers to manufacturers to retailers – we should all work together to offer affordable products that are good for our planet. Most consumers aren't yet really concerned with sustainability or healthy food. So to actually make an impact, we need to collaborate more. That will enable us to offer those products at prices that make it a no-brainer for everyone."

More stores?

Most pet retailers grow by opening more stores themselves, or by attracting franchisees to open them. Since Discus doesn't have its own stores, growth depends on existing members opening new stores, or on attracting new entrepreneurs as members.

De Jonge acknowledges that finding new members is not easy, for a number of reasons. An aging population means that a lot of potential Discus members are stepping away from retailing. Although Discus is collaborating with universities to attract new talent, there are few people entering the sector, especially since banks are proving less keen to invest in retail.

Future plans

Within the Netherlands, De Jonge would like to see the organization grow to 150 stores. But it's not sprinting to achieve that goal. Steady growth will get it there over time.

While Discus doesn't have the ambition right now to open stores internationally, it is considering collaborations with foreign partners to sell more private label products and achieve greater economies of scale.

A key project in the next 12 months is the development of a new back-end system. This will centralize data to help the entrepreneurs get better insights, make better business decisions, and serve the consumer even better. ♦



Philippe Vanderhoydonck
Managing Director
GlobalPETS



Global pet industry

The pet supplement market is blowing up. What's trending and what's new? The accessories market isn't standing still either: you'll discover what influences collar, harness and leash trends. Also, we'll dive into wearable tech innovations and the continuing acquisitions boom in the industry.

Pandemic boosts health of pet supplement market	44	Wearable tech: does it improve a pet's life?	54
The latest rage in pet supplements: water additives	46	Petway Petcare <small>AUSTRALIA</small>	57
What's new in the pet supplement sector?	48	New Age Pet <small>UNITED STATES</small>	59
Interzoo – great expectations for the first post-COVID edition in May 2022	51	Shifting pet marketplace leads to further consolidation	60
How human fashion trends lead the way in collar, harness and leash styles	52	Growth of the pet sector has spurred increased acquisitions by equity holding firms	62

Pandemic boosts health of pet supplement market

The onset of COVID-19 didn't just increase the rate of pet ownership. It also made consumers far more health-conscious – for themselves and for their pets.



Demand for pet supplements was already growing before the pandemic, according to Bill Bookout, President of the National Animal Supplement Council (NASC), as pet parents figured that, if a multivitamin was good for them, then it should be good for their pets as well. But in 2020, Bookout says, the pet supplement market grew as much as \$200-300 million (€176-264M) in a single year.

Panic buying?

"Initially, when demand went up like crazy in April, we weren't sure if that was panic buying," Bookout says. "Demand flattened in May, and then it increased again."

With the sector now worth \$1.8 billion (€1.6B) according to NASC, Bookout doesn't believe the breakneck growth is likely to continue, but he doesn't see it disappearing entirely either. COVID, it seems, has permanently changed both the type and quantity of supplements pet owners are inclined to buy.

Well-being top of mind

Nicole Hill, Executive Director of Strategy for brand and insights firm MarketPlace, believes two primary trends are responsible for the rapid growth of interest in pet supplements during the pandemic.

Similar to the dynamics that drove consumers to acquire new pets at record rates, spending more time at home prompted increased awareness of the pet's health and well-being, Hill says.

"As you spend more time at home, you have more visibility of your pet and maybe notice things you may not have noticed before," she says. "Maybe they seem to have some skin or some coat issues, or maybe they aren't as mobile as they could be."

Noticing more health and aging-related concerns, Hill says, led consumers to purchase more supplements in pursuit of solutions. At the same time, she says, there was a marked increase in interest in probiotics and other supplements to promote gut health and immunity.

"We're seeing that people have immunity and quality of life top of mind, for themselves and their pets," she says.

Easing anxiety

Recent market research by Marketplace, Hill says, generally shows shifts in consumer demand that align with these emerging concerns and attitudes. Joint health, and skin and coat conditions remain the top health benefits pet owners seek in a

supplement for their animals, Hill says, but these are now followed closely by anti-anxiety and immunity. Pet owners also reported they were more likely to buy a supplement with more than one benefit – for example, a skin and coat supplement that also offers potential calming benefits.

Effectiveness-issues

The trouble with some of these categories, especially anxiety, is the absence of effective supplements on the market. Despite the glut of anxiety-related supplements entering the market for pets, Hill says, consumers have noticed problems with the consistency of these products, and many pet owners have reported that anxiety supplements that seem to work at first seem to lose potency over time.

COVID-19 further exacerbated this conundrum by both providing more opportunities for owners to observe their pets' behavior before and after taking a supplement, and by potentially exacerbating separation anxiety in some pets, she says. "It's a continual need that pet parents are voicing that does have a very recognizable effect when it works, or when it doesn't work."

A market opportunity

The lack of effective solutions to meet the demand does present an opportunity for innovation and new entrants into the field, Hill says. But both Hill and Bookout noted that the investment in research and development that is needed to identify effective supplements could make it a tough sector to succeed in.

"People are looking for confidence and efficacy," Hill says. "It's a stiff competition in terms of spend required to break into the pet supplement space."

This could be the other upside of COVID-19, Bookout says. The pandemic has not only increased demand for pet supplements but has also raised consumer consciousness of quality and efficacy, which may, in turn, lead to more research and more diverse and effective product offerings. ♦



Emma Penrod
PETS International Contributor

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The latest rage in pet supplements: **water additives**



Water additives for pets is a growing niche as more pet owners seek individually-tailored and healthy supplements for their pets.

Water additives – products that are added to a pet's water – are believed to have several key benefits when compared to the dry alternative, including easier administration and better bioavailability. In theory, this would mean they are fast-acting and offer superior effectiveness. In reality, they are still struggling to find their place under the sun.

Risks and benefits

"The issue with vitamin and trace element fortified pet supplements of any format – both liquid and powder – is that most animals are consuming a complete feed. So, there is a real risk of overdosing nutrients and exceeding the maximum safe nutritional intake level," a spokesperson for the UK Pet Food Manufacturers' Association (PFMA) said.

However, if applied correctly, water additives could bring some real benefits to pets. "Unlike many other animals, dogs don't sweat except a small amount from their pads. They can, though, lose water during exertion through panting. Nutrient-containing drinks

can improve water intake over straight water," the spokesperson said, adding that there is some research that has demonstrated benefits of nutrient-enriched water in working dogs.

On-trend

It is believed that companies producing water additives could take advantage of the pet food customization trend, which has been gaining traction in the past few years.

"In general, items that pet parents can use to 'customize' the diet of their pet are in strong demand. This can come as a treat, a supplement, and an add-on to the meat, like a meal topper or a sauce," said Geert van der Velden, Innovation Manager of IQI Petfood, expressing confidence that the customization trend will develop further.

Currently, suppliers are primarily focused on water-soluble functional ingredients that can enhance the digestive system – including prebiotics or probiotics –

have a calming effect, or have a positive effect on joint health, Van der Velden said.

There are a few water additives for pets available in the market already, the PFMA spokesperson pointed out, and there is clearly space for these sorts of products in certain cases, such as pets with specific needs. For example, he said, Oralade Pet Rehydration Drink for Dogs & Cats has a product that looks to be primarily aimed at dogs and cats with gastrointestinal sensitivities and veterinary use.

Focus on health benefits

In the past years, several pet food launches in the US have come in a drink format, for example, from brands such as Tally-Ho and Wolfspring.

Launched by Ocean Spray, Tally-Ho water enhancers for dogs are intended for daily use to improve flavor while delivering active, functional ingredients. Wolfspring's water supplement contains inulin, glucosamine, omega-3 and potassium as health ingredients.

"Consumers enjoy the format of dog beverage or water additives because it is something they use themselves. But at the end of the day, they want to see their dogs enjoying the experience and getting real health benefits," commented Etienne Legangneux, co-founder of Wolfspring.

COVID-19 has prompted an increased focus on self-care across the globe, with a growing number of people paying closer attention to their health. As the pet food market often follows human consumption trends, this segment is likely to enjoy a growth in demand in the coming years.

"Most of the liquid products and water additives launched over the last few years were simple taste enhancers, which were just not bringing enough. We are creating a new category, in between the food

toppers securing extra nutrition and the supplements securing strong health benefits," Legangneux said. Dogs' wellness will remain the most important trend in the future, he said, and people are looking for new products outside of the usual food-treat-supplement formula.

"We have a lot more formulas in development. We are going to release a 'Weight Management' formula in Q1 2022 and will keep releasing more innovations throughout the year. The idea is to create a wide range of formulas to help dog parents keep their dog healthy, whatever issues they might face," Legangneux added.

Cost and sustainability

Although the humanization trend prompts customers worldwide to spend more money on their pets, water additives still need to prove to customers that they are worth the additional costs.

"I think that most dog owners, in particular, see their pet drinking from dirty puddles so won't pay for bottled specialized pet water. Tap water tends to be well accepted by most pets," the PFMA spokesperson said.


"Some owners I know keep a tap running all the time, as their cats like to only drink from a running source. There are pet water fountains catering to this sector also, but I don't see these products partnering with specific pet waters," he added.

The bottom line, he said, is that flavored waters to encourage intake might be an area of growth, but that it is likely to be small as the cost versus tap water and the sustainability of single-use plastics is a barrier. ♦



Vladislav Vorotnikov
PETS International Contributor

What's new in the pet supplement sector?



Recent years have seen growth in vitamin and mineral usage among pet owners. And more owners swear by them. However, while demand for supplements is growing, new product development is relatively limited.

In the UK, 35% of pet food buyers agree that supplements are the most efficient way of delivering functional benefits to pets. For those aged 25-34, this group rises to 45%.

To serve the increased interest from pet owners, more and more companies around the world are catering to their wishes. In Australia and New Zealand, for example, the share of vitamin and mineral-fortified claims in pet food and pet product launches has doubled over the last 5 years.

'Mood foods' anyone?

Two-thirds of pet food buyers in the UK agree that what you feed your pets has a direct impact on their emotional well-being. Owners' inclination to seek out ways to better manage their own emotional well-being, it seems, is extended also to that of their pets.

Pet food with calming ingredients sparks interest among half of the pet food buyers (48%), signaling that anxiety in pets is a real area of concern for many owners. Much more can be done to further mine the importance of emotional well-being in the pet food market.

This can be through mood-focused marketing messages or by using ingredients with links to

emotional benefits. A fairly rare example of the latter is Pooch & Mutt, with its calm and care supplement including chamomile and L-tryptophan.

Meanwhile, in Sweden, Apotek offers a stress and anxiety supplement that contains the amino acid L-theanine. The brand claims it has a calming effect and contributes to reduced stress and anxiety, without giving a feeling of tiredness.

Turning to CBD

As awareness continues to grow about the potential benefits of hemp and CBD-derived products, for both humans and animals, these products are growing in a variety of innovations. Hemp and CBD are new options for consumers who are increasingly looking for ways to care for their pets that suffer from ailments, neurological disorders, arthritis and even joint issues.

Pet Magic is the first Mexican CBD oil brand exclusively for pets. There are 4 oils to choose from that help to treat stress, anxiety and pain in pets or can serve as an aid to relieve allergy symptoms.

There's also room for CBD-infused grooming products, such as Far Out CBD Moisturizing Shampoo as well as CBD dog treats from beverage brand Recess.

NATURA COMES TO YOUR HOME

Toppers help drive growth

While many toppers are positioned purely for appetite appeal, a growing number also promise functional health benefits. A common denominator across this diversity of functions, forms and benefits is 'customizability'. Toppers enable pet owners to create treating and feeding experiences uniquely suited to their pets' needs, catering to individual taste preferences and dialing in just the right amount of indulgence, care and interaction.

Although the original inspiration for pet food toppers may have been table scraps and other 'people food' mixed with kibble to make a tastier meal, supplemental nutrition has become a key theme as the market has grown.

In the US, Purina Beyond Mixers+ highlights added vitamins and minerals, and features varieties that promise immune and digestive support. In Mexico, Cha-Cha Shaker is a low-calorie, vitamin-packed pet food mixer. And in Colombia, Nutrello Flavoring Chicken Sauce is said to strengthen the immune system, regulate mineral balance and improve bone health.

Digestive and immunity-boosting products

In fact, digestive health seems to be a popular focus of supplements around the world. In China, a liquid probiotic dietary supplement features an imported New Zealand goat milk base, encapsulated with a patented 5-layer coating technology. The dietary supplement is said to be made with 7 types of active probiotics and 5 types of prebiotics.

In Indonesia, Kin Dog Goods capsules claim to work as a stomach soother to naturally coat and lubricate the GI tract and stomach lining. The prebiotic formula is also said to help to promote balanced flora in the gut. ♦



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Interzoo – great expectations for the first post-COVID edition in May 2022

Interzoo, the world's leading trade fair for the pet supplies industry, is looking forward to its very first live edition, after an extended period in which physical get-togethers were no-go due to the pandemic.

"We are extremely happy to offer a robust and live platform for the international pet industry from 24 to 27 May in Nuremberg!" comments Dr. Rowena Arzt, Head of Exhibitions at Interzoo organizer WZF.

Positive signs

Arzt: "We already have exhibitors registered from more than 60 countries. In fact, we see there is a very strong demand from around the world. Country pavilion organizers are also enthusiastic, with 2 new countries having announced their participation. Such positive signs make us extremely confident that Interzoo will, once again, be the place to meet up for people across the globe. A unique and great opportunity after 4 years of face-to-face abstinence. I personally can't wait to see similar big events take off as well."

Safety first

Organizer WZF and Nürnberg Messe – responsible for the organization – are closely following the developments of the COVID-19 pandemic. Of course, many safety provisions have been taken, including a sophisticated safety and hygiene concept and the provision of test capacities. The enormous size of the halls, where the air is completely refreshed several times per hour, offers suitable conditions for a safe trade fair experience with exhibitors and visitors from around the world.

According to recent updates from the Association of the German Trade Fair Industry (AUMA), there are currently almost no travel restrictions for trade fair exhibitors and visitors. This, despite the high number of COVID-19 cases.

Arzt: "It is possible for trade fair participants from abroad to travel to Germany. This also applies to exhibitors and visitors from high-risk areas and for participants who have not been vaccinated against COVID-19. However, entry to trade fair grounds may require proof of vaccination, or proof of recovery from COVID-19."

Optimal trade fair experience

Personal meet-ups with industry colleagues, worthwhile new business contacts, discovering new trends and finding inspiration for your own business: all this and more are the benefits of a classic, live trade fair visit.

"As organizers, together with our partners, we can create the framework for an optimal trade fair experience for exhibitors and visitors," emphasizes WZF Managing Director Gordon Bonnet. "After a long period, with only a few industry events, experiencing the fair with all one's senses is leading at this year's Interzoo event. Being able to meet up in person turns an event into a lasting experience that is more than the sum of its parts." ♦



How human fashion trends lead the way in collar, harness and leash styles

As pet owners seek functional products that match their own style and disposition, they are leaving their mark on what collars, leashes and harnesses look like.

Pet owners are spending more time than ever at home with their pets, due to the COVID-19 pandemic. This has boosted the humanization of pets, according to Charlotte Wicks, Brand Manager at We are Company of Animals.

Fashion isn't just for humans anymore

No wonder what is in fashion for humans is also in fashion for their pets. In fact, anything that is popular among humans is likely to have its counterpart as pet accessory also. Take popular and trending textile motifs such as British plaid, space prints, logos and licensed images, including cartoon and movie heroes. All are extremely popular on leashes, collars and harnesses. The same goes for trending colors.

"Owners try to stand out among the crowd and choose bright and eye-catching outfits," according to Anastasia Kuzmenko, Chief of the R&D Department for COLLAR Company. She notes that the trendy colors are usually defined by Pantone. This year, shades of purple are popular, particularly Veri Peri.

In some places, these fashion trends reflect hyperlocal preferences or pet parents' favorite pastimes. Kim McCohan, Chief Happiness Officer at Bend Pet Express in Bend, Oregon, US, observes that pet owners are gravitating toward brands that reflect the outdoors, like Patagonia. But she also notes that the local store

Pendleton as brand is also popular amongst pet owners. McCohan: "If someone can go the extra mile by reflecting their love for the outdoors even more with their dog gear, why not?"

Sustainability and quality

The recent focus on the environment means that brands are incorporating the use of more environmentally-friendly materials in product design and packaging. COLLAR now produces a wider range of their Re-Cotton Series, which uses recycled cotton.

But sustainability also has everything to do with quality as far as consumers are concerned. With consumers having more money in their pockets to spend, in addition to more pets to spend it on due to the pandemic, premium accessories for their pets is what they are demanding. Quality standards such as ISO 9001 provide pet owners the peace of mind that they are purchasing products that will last.

McCohan notes that locally made gear has performed exceptionally well during the pandemic. Among their best-sellers are accessories from the Spindrift brand, which sources all materials from the US. As a result of global supply and transportation issues, they were the only company that seemed to stay fully stocked with no delays.

Functional gear

Thanks to the increase in active lifestyles, brands have placed more emphasis on the functionality of products to meet consumer needs. Company of Animals created the Halti no-pull head collar and other complementary products to help facilitate no-pull training.

Wicks: "Our Halti training range is designed to stop dogs from pulling on the lead and bring the enjoyment back to your dog walk."

The Company of Animals brand has also adapted its products to dogs that, like humans, come in all shapes and sizes. Products are designed to offer the perfect fit for not only 'regular' size and breed dogs, but also for cross and mixed breeds.

Manufacturers have also seen an increased need for better reflective gear for letting out dogs safely in the dark. COLLAR Company has addressed this demand with a recent launch of their Waudog Waterproof series of collars, leashes and harnesses. The accessories are fitted with reflective tape that makes a dog 10 times more visible in the dark.

Innovation drawn from customer needs

Talking of safety: as pet owners purchase more accessories for their pets, companies are providing more innovative ways to ensure pet safety. COLLAR Company collars and harnesses include a QR code that contains pet identification information.

Last but not least, now that owners are spending more time with their pets, they have become pickier when it comes to the materials or fabrics used in accessories.

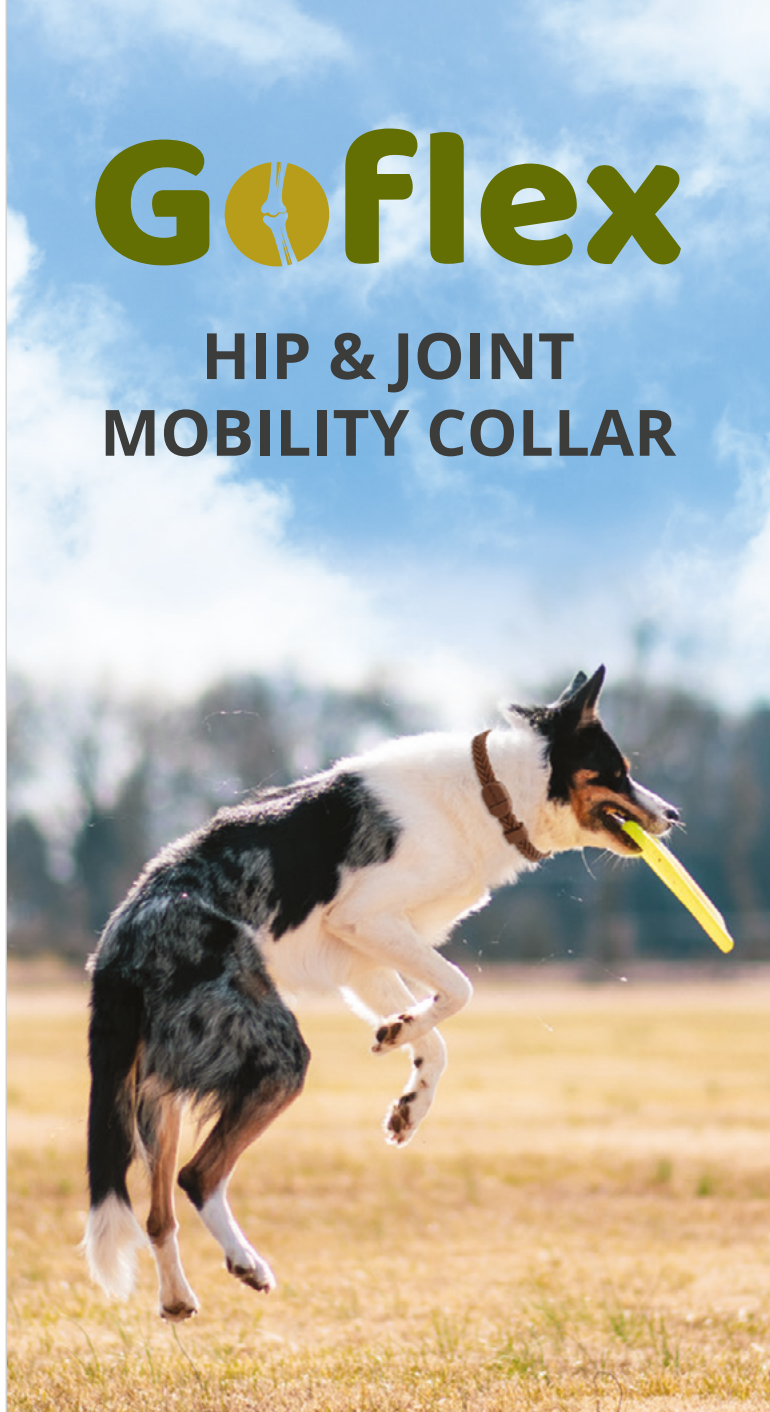
Wicks: "At Company of Animals we continue to create new fabric options that address evolving consumer needs and lifestyles. This includes more lightweight, breathable, hardwearing and reflective materials." ♦



Jen Sotolongo
PETS International Contributor

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Wearable tech: does it improve a pet's life?

More pet parents are starting to see that technology is a good way to keep their four-footed friends healthy and at the right weight – and to keep track of their movements.



Scientific innovations used for human purposes are now being applied to promote pets' well-being. And the pet humanization trend of recent years is reflected in technology, with a great increase in demand for different kinds of devices from pet parents around the world. Today, it's not unusual to see dogs or cats with something attached to their collar to monitor their activity or track their location.

Activity monitoring

"People don't know the answer to questions about how much exercise or the amount of food their dog needs, and that's where activity monitoring comes in," says CEO and co-founder of PitPat, Andy Nowell.

Between 2020 and 2021, this UK developer of a pet tracking device for dogs shipped 39% more of its products. At the same time, the UK pet population increased by 10% to more than 9 million and a new type of pet owner appeared on the scene, the so-called millennial or Gen Y generation. They account for the majority of customers that purchase a wearable tech device, mainly wanting to know how far their pet has gone and what the dog is doing while they're out. Others use wearable devices to measure agility, or do cross-country running with dogs, a sport called Canicross.

According to PitPat, around 100,000 dogs in the UK have now been fitted with activity monitoring devices.

Data clarifies pet needs

Dirk van der Liden, Senior Lecturer at Northumbria University, and author of a set of studies analyzing

the role of such devices on pets, believes that tools like these can really help pet parents improve their pet care. "There is a potential for objective sensor data, with appropriate validated algorithms and interpretation, which can be translated into clear instructions about what our pets need," he said in an interview with GlobalPETS.

According to Van der Liden, these devices can help to avoid unnecessary weight gain. "Pet obesity is such a massive issue in many countries, and obviously most pet owners don't intend to let their dogs get too heavy, but simply don't realize they're doing things wrong, or are on the wrong path."

Although pet parents are the main targeted purchasers, wearable devices have also proved useful to veterinarians – especially as part of a telemedicine service since the pandemic – as well as to universities and pharma companies. They are even used for military purposes.

The state of play

The wearable tech segment is chiefly made up of small start-up companies that compete with other pet industry players such as food producers, insurers or large retailers. But this may change in the near future. "All the big players are extremely interested. They are all into it, and they will jump into the field in one way or another," said Asaf Dagan, co-founder of the US smart dog and cat collar manufacturer PetPace.

One of the most significant investments so far has been the acquisition of the Whistle pet monitor and

GPS tracker by multinational Mars Petcare. Data companies are predicting that the segment will be worth between \$2.4 billion (€2.1B) and \$3.5 billion (€3.1B) in the coming years, with an annual increase ranging between 13.5% and 25% by 2025.

The general consensus among industry players is that the segment is consolidating in top markets such as the US and some European countries, while countries in Asia have been seeing many new launches in the market in recent times.

Developments in Asia

One of the Asian markets to watch is South Korea, where it is believed that 19% of the pets are fitted with wearable tech. Seoul-based PurrSong, the developer of an innovative self-cleaning cat litter box, has recently launched a new smart fitness tracker for cats. "The number of people visiting veterinary clinics has decreased in the recent pandemic years. This has increased pet owners' interest in pet well-being-related devices that can supplement regular check-ups at clinics," said the company's International Sales Manager Seunghee Hong.

Forecasts for the Japanese market are also optimistic. Langualess Technology already sells a harness device for dogs that measures health parameters such as heart rate, and it is expecting to launch a new collar-type device in the local market this year. The company believes that 'many pet owners in Japan want to take even better care of their pets'. Its products use a Heart Rate Variability (HRV) measurement to analyze the pet's mood, happiness, concentration and stress.

Awareness and added value

Despite the segment's potential, there are still some challenges that companies will soon have to face. Awareness is one of them.

"All our market surveys show very clearly that once people understand what you're telling them, and they see the value of wearable tech, there is a strong will to buy it," commented Dagan from PetPace.

"It is a matter of putting the message across. The value is there and the need is there. It's about getting the word out and creating awareness."



According to Andy Nowell from PitPat, the concept of the GPS tracker is better known among pet parents, but there is still work to do in convincing them of the added value of activity monitors. "Data shows that rough search volumes for GPS trackers are 5 times higher than for activity monitors."

Hardware improvements

Companies are also looking to improve the hardware for these pet devices. This technology has to be developed from scratch, as it's not possible to adapt existing products developed for humans. "There is a barrier to market access in terms of the cost of building the device," PitPat CEO Andy Nowell reminded us.

Privacy concerns

Other concerns are about the privacy of these devices and how companies use the data. "Humans and dogs are closely linked in their behavior, so dog data does indirectly reveal a lot about the humans with them," admits Dirk van der Liden from Northumbria University. In one of his studies, he found that many pet wearables do not yet clearly state how they treat and store the data they collect from pets. "This is definitely a concern that needs to be addressed, as the pet data from these devices is valuable in its own right and sought after by other companies in the pet sector."

The use and interpretation of pet data is also something that companies are looking at closely. "What does it mean if I tell you that your dog's pulse is 68 and yesterday it was 65?" asks Asaf Dagan, whose company has over a billion data points, with thousands of animals providing data daily. "No one has had this type of data before. It is a brand-new world." ♦



David Palacios Rubio
Editorial Manager
GlobalPETS



COLLAR Company UKRAINE WAUDOG NASA collection

COLLAR Company issued the WAUDOG collection with cosmic designs approved by NASA. This space-inspired collection includes collars, harnesses, leashes and clothes. Made from tear-resistant nylon; containing pet tags with QR passports. All hardware has a lifetime warranty. The NASA21 collection comes in different designs and sizes to meet customers' needs. The company offers free trade equipment.

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Let's face it, your dog loves playing with a frisbee, but when it falls to the floor things get complicated. Don't worry, Trotto disk is the solution!

Spring is coming and that means outdoor fun, running, sports and pure relaxation. Of all the possible toys, there is one that you can use to train your dog to run and fetch: the frisbee. Seeing the problem, Bamapet reinvented the frisbee and came up with an effective and innovative solution.

Trotto disk is non-toxic, scentless, flexible, resistant, bouncing, floating, with rounded edges, also suitable for agility training. The disk has a handle, so your dog can get it when it's on the floor, without your help and without you having to stop playing to pick it up. Fun guaranteed.

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The secret to the best grooming products: a quality blend



With well over 3 decades of experience, Petway Petcare manufactures and distributes Australian-made premium grooming products that meet the highest standards.

The Petway product range was originally created for the discerning pet professional – groomers and mobile dog wash operators. But they're now also used by vets, rescue groups, pet kennels and pet resorts, and are sold in pet and produce stores. So pet owners wanting the best for their furry family members can buy the same professional-grade product that their groomer uses and recommends.

Naturally based

Petway products are naturally based, bio-degradable and environmentally responsible. They're formulated with essential oils and herbal extracts of natural origin, as well as plant-derived ingredients, and are pH balanced for a pet's sensitive skin. These high-quality products are made using only premium cosmetic-grade raw ingredients and purified water, to ensure they all provide peak performance.

There are almost 50 items across the range, including those free of soap, paraben,

phosphate, sulfate, silicone and DEA.

The shampoos are highly concentrated, so only small amounts need to be diluted in warm water. As a result, less is required to achieve superior grooming results, when compared with other products on the market.

Very personal service

As a hands-on family business, Petway Petcare is extremely passionate about its products and giving great customer service. There is always someone available to answer the phone and assist customers. Much of the company's growth has come from word of mouth, as consumers not only love the products, but also the personal service they get. No generic emails here! And orders are dispatched the same day, with no products ever out of stock.

The company's manufacturing facility is registered with the Australian Pesticides and Veterinary Medicines Authority, and is ISO 9001 Quality Assurance accredited. With

professional quality control measures in place, it can ensure that it always provides customers with premium products. And the R&D team is continuously working to develop new products using the latest proven ingredients, helping to maintain the company's position as an industry leader.

Wanted: new distributors

Petway products are widely used by pet industry professionals and pet lovers throughout Australia, New Zealand and Singapore. They also sell successfully on Amazon in the US and Canada. The cat shampoo is even one of the bestsellers on both of these sites. With trademarks in place across the globe, the company is now looking for new distributors across the US, Europe and Asia to let even more customers into the secret of excellent grooming. ♦

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Agras Petfoods ITALY Schesir's values and products

If it is true that our choices define our identity, it is also true that we need a compass to make the right decisions. Schesir's choices guide their every step: naturalness and quality, well-being and health, sustainability and care for the environment, honesty and transparency. These are the company's choices.

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Agras Delic S.p.A.
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Coveris AUSTRIA Growing sustainably

Irish Dog Food, a UK pet food producer, has teamed up with Coveris to launch their first recyclable bags in bigger sizes. By choosing a proven MonoFlexE brand, the company achieved on-shelf appeal and improved packaging recyclability for its Earls pet food range developed for Aldi.

The goal was to switch from the existing range of bags with a PET/PE structure to a recyclable mono-material PE structure. Additionally, the range included 2 sizes of 10 kg and 12 kg bags which offer the same benefits as the standard structures with a matte finish, while reducing the carbon footprint and environmental impact.

The mono-material solution meets 1 of the 4 targets of the UK Plastics Pact, which is to transform 100% of plastic packaging to be reusable, recyclable or compostable by 2025.

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Coveris
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Bringing durability and style to pets in and outside the house

NewAgePet® is a pet and urban farming products company that has worked for over 20 years to perfect their unique ECOFLEX®-based products. This highly durable material ensures that pets are happy, healthy and comfortable for years to come.

New Age Pet specializes in comfortable and attractive pet furniture that pets love and humans are proud to display. Designing modern, sleek and practical products for dogs, cats, chickens, reptiles and rabbits is their pride and joy. They carefully craft and inspect their high-quality products to bring elegance and style into pet-friendly homes around the world.

Background

The company is headquartered in the San Francisco Bay Area in the US. Their factory is in Shantou, in the Guangdong province, on the eastern coast of China. It's a vertically integrated company that covers the complete production process: from product ideation to manufacturing, through to sales.

New Age Pet has distribution channels worldwide, with customers in Japan, Australia, New Zealand, the UK, Europe, Canada, Mexico, Costa Rica and the US.

Products and materials used

The company started with a simple goal: to create durable, functional and eco-friendly pet products that complement consumers' home décor. To be able to live up to this aspiration, they developed a proprietary composite blend of new and recycled polymers, and reclaimed wood fiber byproducts. This composite blend combines the benefits of wood and plastic into one material: ECOFLEX®.

Different than any other material available on the market, ECOFLEX is durable, long-lasting and non-toxic. It is also resistant to rot, mold and insects. It doesn't expand and contract due to fluctuations in temperature or humidity, as do many similar products.

ECOFLEX products are designed to be especially quick and easy to assemble, with most products having an assembly time of only 20-30 minutes. The material is paintable, which means pet parents can



paint products to their heart's content to match their style and décor.

In the knowledge that their products are highly durable, New Age Pet offers an unrivaled warranty on all its ECOFLEX products. ♦

New Age Pet
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newagepet.com



Shifting pet marketplace leads to further consolidation

As the pet industry continues to grow and outsized returns are realized, capital inflows are driving expansion and competition. Success attracts innovators and imitators alike, and as industry growth slows and competitive dynamics change, consolidation follows.

When first covering the pet industry, the number of businesses with the backbone of 'I could not find it, so I made it' was remarkable. Over time, we have witnessed the industry experience substantive change, evolving from a home-spun category, driven by an entrepreneurial spirit to a systemic global business. That is not to say the founders' flame has been extinguished, but today the industry rises and falls based on the performance of a concentrated set of market participants.

Consolidation

Consolidation in the pet category has accelerated, as disparate point solutions evolved to become systemic businesses. S&P Capital IQ reports that global pet industry transaction volume has grown ten-fold in the past 20 years, with a record deal volume of 335 transactions in 2021, up from 265 transactions in 2020. While 2021 may stand as a record year, we do not believe the consolidation drumbeat will fade in light of several factors.

Most crucially, the pet industry remains an attractive growth category. While industry growth tapered in the largest pet markets leading up to the pandemic, COVID-19 accelerated pet population growth and category spending trends. This injection of demand

created market opportunities for both existing and new entrants.

Coupling this with the continued manifestation of humanization and premiumization in emerging pet markets, few consumer categories can match the same durable growth potential of the pet industry. Profitable growth is one of the most valued attributes in today's transaction markets, and the pet industry has profitability in spades. Capital will continue to flow to the pet category and industries where attractive returns can be realized.

Changing marketplace

A second factor is that the nature of competition has changed. In the US, we have shifted from an economy led by older generations that possess stored wealth, to one driven by younger generations with access to fewer resources. While older generations show a higher propensity to shop in physical retail stores, younger consumers prefer to shop online.

As a result, many incumbent franchises have been disconnected from the customer, both in terms of products or services and preferred sales channels. Acquisitions are often a 'quick fix' for businesses that need to reposition their proximity to the customer.

This theory is being proven by the many buyers seeking and paying a premium for pet businesses offering products in the right formats, or accessing customers in preferred channels.

Operating at scale

It has been demonstrated in consumer categories that the benefits of industry growth are primarily found in scaled franchises. As the pet industry has seen its products and services formats proliferate, and as those that control customer access seek to monetize their position, the cost of doing business has increased. As retailers seek continuity of products on their physical or virtual shelves, they are also favoring larger providers who have more supply chain control and access to substitutes when supply is constrained. Also, competing in the fastest-growing economies requires substantial resources. As a result, many innovative companies are realizing the benefits of being part of larger platforms and operating at scale.

Access to capital

Lastly, and not to be overlooked, money is currently cheap and plentiful. Cash on the balance sheets of large corporations and in the hands of institutional equity investors are at peak levels. S&P Global reported record cash and short-term assets on corporate balance sheets globally at a historical high of \$6.8 trillion (€5.98T) as per August 2021.

According to Preqin, global private equity inflows were on pace to exceed \$1.2 trillion (€1.06T) through the first 9 months of 2021: a new record. Debt also remains abundant and cheap, largely a hangover from easy money policies and stimulus in large industrialized markets. When these capital conditions are prevalent, the pace of M&A has historically been robust and valuations frothy, motivating sellers to transact.

While the Federal Reserve is expected to raise interest rates to fight inflation in the US, we anticipate the pace of consolidation to continue into the foreseeable future. ♦



Bryan Jaffe

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A woman with long brown hair, seen from the back, is holding a small, fluffy white dog. The dog is wearing a colorful, multi-colored knit sweater. The background is blurred, showing what appears to be a busy indoor setting, possibly a pet store or a community event.

Growth of the pet sector has spurred increased acquisitions by equity holding firms

What makes the pet industry attractive for investors?

When Bill Sherk and his partners founded MiracleCorp in 1988, they did so knowing they wanted to one day sell the company. Miracle Corp's first line of products – premium dog shampoos with tea tree oil – may have had the quality to shine, but dog shampoos weren't a particularly large product category at the time, Sherk recalls. Ten years on, it still claimed less than a million in revenue per year.

The pathway to success and selling

MiracleCorp had to expand. So they went on a buying spree of their own, ultimately acquiring 7 other brands to expand into adjacent markets such as collars and tack, and eventually freeze-dried pet foods.

Finally, in the mid-2010s, MiracleCorp's slow and steady growth picked up pace. They sold the majority of their product lines to BrightPet. And they weren't the only pet business to sell.

"Every year for the last 3-4 years, there have been many acquisitions," Sherk says. A growing number of companies – even those outside the pet sector –

want a piece of what has become one of the world's fastest-growing industries. And that growth is likely to continue: "People value pets more than I'd ever imagined. Sometimes it's mind-boggling what people will do for their dogs."

But for the start-ups just breaking into the business, the decades to come will likely look quite different thanks to industry consolidation and the role of online retail.

Pet sector – booming business

"The pet sector has long been attractive to investors, but interest has been especially high the last 2 years," according to Lauren DeVestern, a managing director and partner at L.E.K. Consulting.

Pet care had already demonstrated remarkable resistance to recessions. With more than 90% of people now saying they consider pets to be part of the family, they aren't any less likely to stop feeding the family dog than they are themselves. This makes pet-related companies attractive to investors looking for stable earnings.



Then the pandemic hit, and instead of taking a dive, like so many other sectors, pet ownership and spending on pet care surged. DeVestern: “People who have never invested in pet now want a piece of it. It’s always been an attractive area: recession resilient, and pandemic proof.”

New investors

The stunning performance of the pet industry during COVID-19 not only made pet care companies more attractive. It also changed the type of buyer interested in such acquisitions. Prior to the pandemic, the majority of pet sector acquisitions were strategic purchases of established pet brands by larger pet-focused companies. Since 2020, private equity and other fund managers are responsible for about half of the acquisitions in the industry.

The type of company acquired has also shifted. While pet food brands claimed most deals in the past, recently, other segments have seen an increase in activity. Veterinary services are increasingly popular, as are supplements and pet tech.

Shifting market dynamics

DeVestern remarks that despite the excitement of investors, not every business in the industry is enjoying the same level of success. “The mom-and-pop pet shops are struggling, facing competition from online, as well as other retailers. Everybody is selling pet products.”

Sherk believes that with similar dynamics now sweeping major online retailers, the start-ups of the future won’t be able to follow directly in the footsteps of even the most recent generation of acquisitions. “The distributors have changed over time. They are less interested in building brands. They want to harvest their return quicker.”

New offerings

According to Sherk, MiracleCorp benefited greatly from working with Amazon while the company was still relatively small. However, major names like Amazon or Chewy are now saturated with competing products. A new offering must be truly unique to break out on these platforms. “A direct-to-consumer strategy, or even a platform that allows products to be tailored to individual customers, is likely the winning strategy of the future.”

Nevertheless, DeVestern believes there is still ample room in the market for new offerings. The several million pets adopted over the past 2 years are expected to live an average of 12-13 years. Importantly, pet parents indicate they will be acquiring a second pet over the next few years. “Growth,” Sherk concludes, “will slow down as the pandemic wanes, but we’re not going into low growth territory by any means.” ♦



Emma Penrod
PETS International Contributor

ADVERTISERS INDEX

AFB International	28	Johnson Petfoods B.v./ Riverwood	37
Bacterfield GmbH	21	Kanegrade Ltd.....	6
BHJ A/S Denmark	14	Kormotech Llc	24
Canina Pharma GmbH.....	45	Laboratoire Francodex	back cover
Croci S.p.A.....	49	Laroy Group nv	38
Danube Petfoods d.o.o.....	16	Leiber GmbH.....	27
Dinnissen	35	MUSH Ltd. Oy.....	19
Fischer & Partner / Interzoo	inside back cover	Proilver	40
Grupo Vb Alimentos.....	13	Selo	38
IPV PACK S.r.l. Unipersonale.....	2	Solano Pet Care.....	53
Ingredia S.A.	10	United Petfood Producers Nv/Sa	23
Inspired Pet Nutrition Ltd.....	inside front cover	Yantai China Pet Foods Co., Ltd.....	50
Italfeed Srl.....	61		

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