

June 2009

Petfood WATT Industry

Market Report:
the dogness effect

[petfoodindustry.com](http://www.petfoodindustry.com)

As good as it gets

Bud Wright, Kirk Young and Mike Compton of Precise Pet Products, p. 18

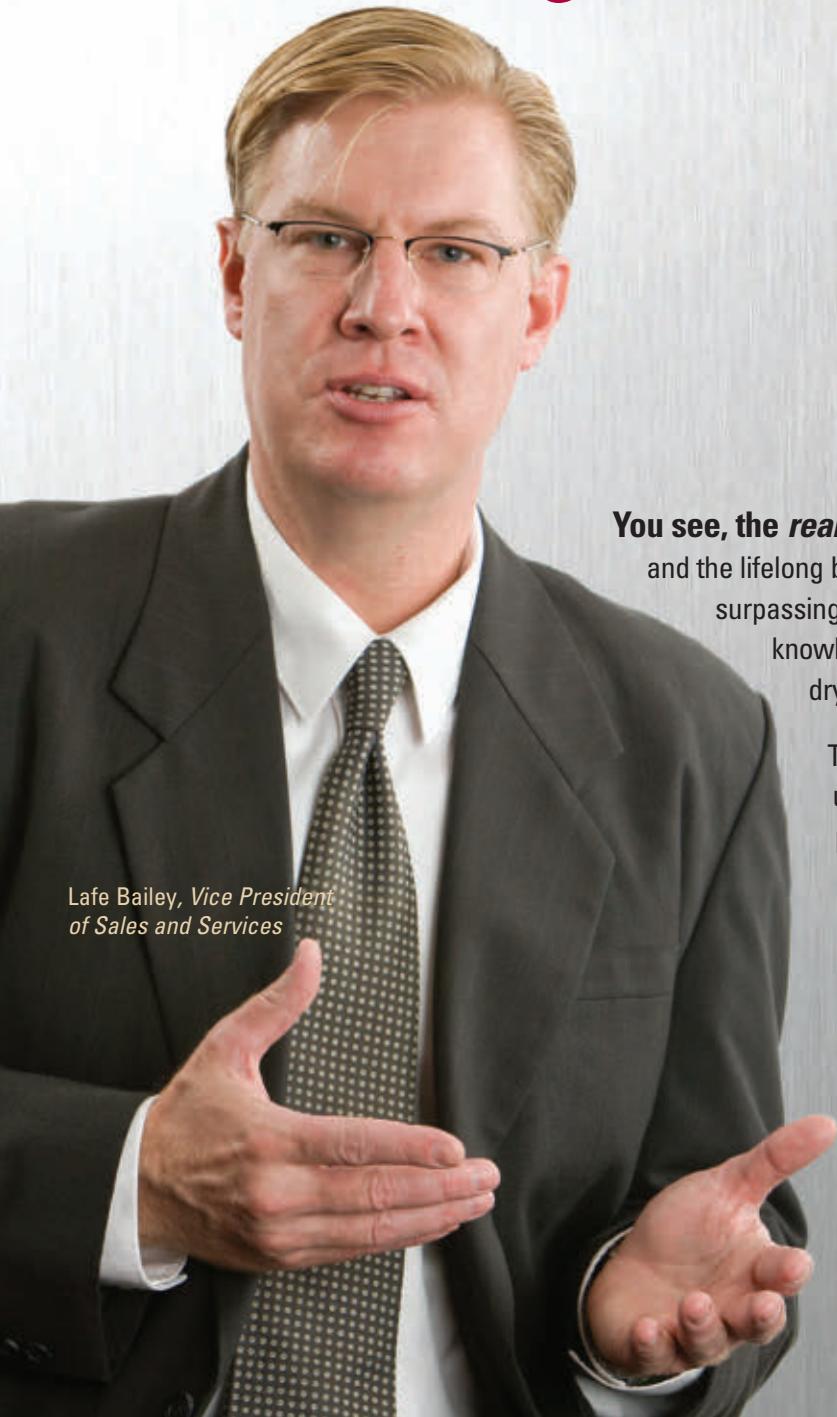
What retailers want—and need

New weapons against contaminants

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Photo courtesy of Dan Bryant Photographs (www.danbryant.com)

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*Nutrition and ingredients

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What do retailers want from you? Read more advice from Rick Rockhill, Petco VP, and view his Petfood Forum 2009 presentation. www.petfoodindustry.com/retailerwants.aspx

Case study: fighting contaminants

Find out how Del Monte successfully implemented new technology. www.petfoodindustry.com/DelMonteCaseStudy.aspx



Weapons against Salmonella

Read the entire scientific report on a new ingredient and what it can do to protect your petfoods. www.petfoodindustry.com/XIMstudy.aspx

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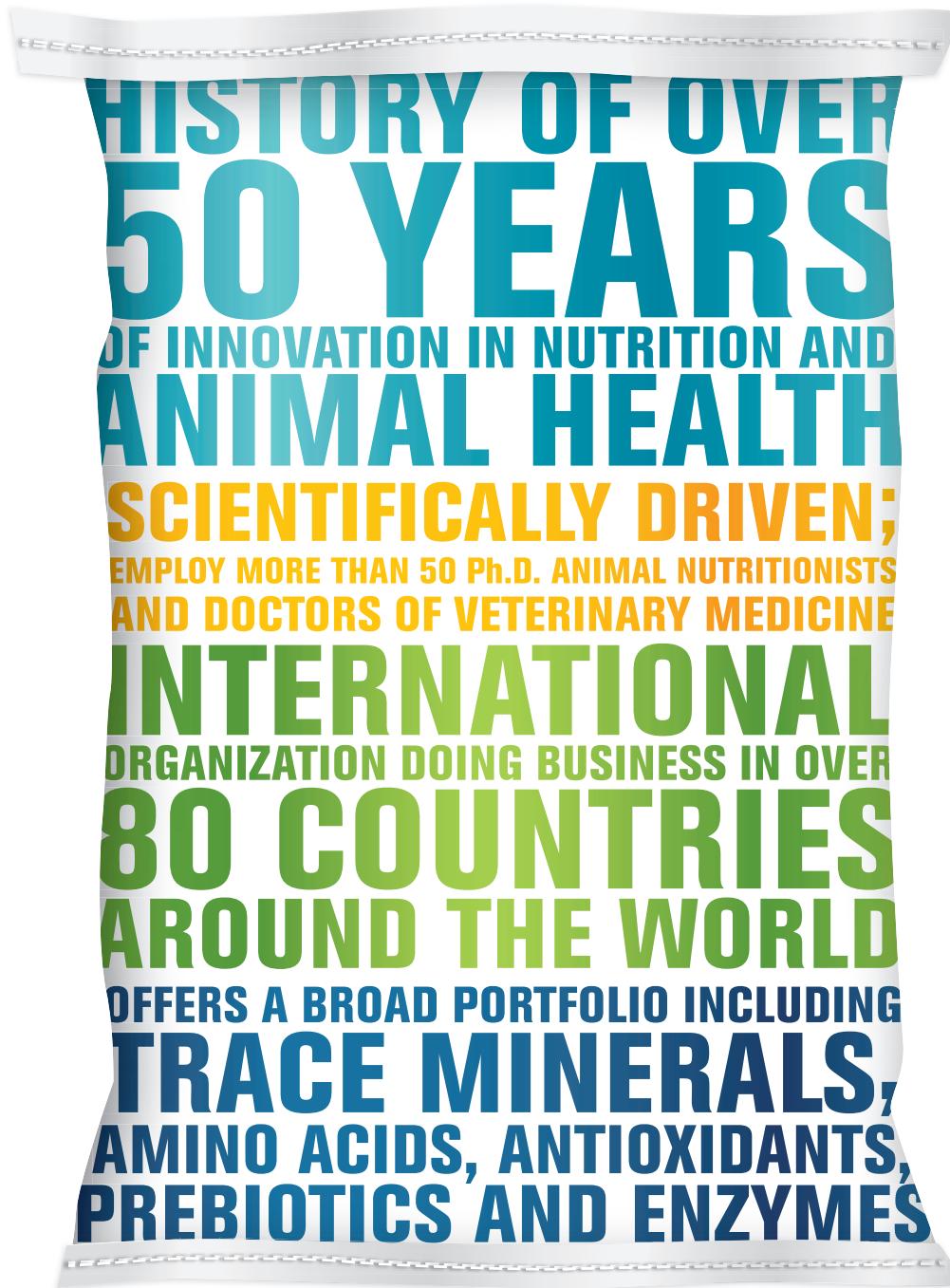
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Flip side of human-pet bond

Humanization. The human-animal bond. Pets as family members. For several years now we've all heard, and used, these phrases as reasons for the petfood industry's continued growth, especially in developed markets. As more consumers pamper their pets and elevate them to the level of human family, they've been willing to spend more on petfood.

Naturally, many of you have oriented your brand and product marketing toward this trend. (Sometimes that means a marketing message that parodies or questions the trend; see p. 36.)

But as an industry, are we missing a huge opportunity to take advantage of another aspect of the human-pet bond? Because there's a flip side: what people get out of the relationship.

The connection

During Petfood Forum 2009, keynote speaker Marty Becker, DVM, talked about how pets' roles have evolved over the past several decades. "In my lifetime I saw them move from outside to inside. What really changed was the connection. Once we welcomed them into our hearts and homes en masse, we started having a different kind of relationship based on close physical contact and intimacy."

Dr. Becker emphasized that the change hasn't just benefited pets; a growing body of research is showing how this intimacy is helping people live longer and healthier. He cited findings also reported by Kay Lazar of the *Boston Globe* on April 20, the day before his keynote (http://www.boston.com/lifestyle/articles/2009/04/20/animal_attraction). Consider:

- ▶ A study conducted by the Minnesota Stroke Initiative at the University of Minnesota in Minneapolis showed cat owners are 40% less likely to die from a heart attack than non-cat owners;
- ▶ The same study showed cat owners are

Are we missing out on a huge marketing opportunity?

— Debbie Phillips-Donaldson



less likely to die from all cardiovascular diseases, including strokes, even when the researchers took into account several risk factors for heart disease;

- ▶ Several studies showed interacting with a pet may help protect against allergies, asthma and even cancer;
- ▶ Recent findings suggest smokers who are told second-hand smoke harms their pets are more willing to quit;
- ▶ The Research Center for Human Animal Interaction at the University of Missouri in Columbia found that dogs are more likely to inspire older people to stick with a walking program than two-legged walking companions do.

Looking for impact

So much is happening in this area of research that many entities are getting involved. In the US that includes veterinary schools—see Purdue University School of Veterinary Medicine's Center for the Human-Animal Bond (<http://www.vet.purdue.edu/chab>)—as well as governmental agencies such as the Centers for Disease Control, which has a program called Healthy Pets Healthy People (http://www.cdc.gov/HEALTHYPETS/health_benefits.htm). The National Institutes of Health (NIH), the US government's main agency for medical research, just announced a research partnership with Mars (<http://newsinhealth.nih.gov/2009/February/feature1.htm>).

The scientists involved in this research stress that not all of it is conclusive, and

some findings even disprove the claim that owning pets makes people healthier. James Griffin, a deputy branch chief with NIH and leader of the Mars initiative, emphasizes that health experts need large-scale, controlled studies to determine the true impact of pets on human health.

But the fact that governments, universities and corporations such as Mars would put money behind this research indicates there's probably a positive and potentially significant impact to find.

Online extra!

Watch Marty Becker, DVM, talk about the human-pet bond as well as the benefits of food puzzles for pets, at www.petfoodindustry.com/DrBeckerVideo.aspx.

What's your play?

Findings so far point to a possibly powerful new marketing and positioning strategy for petfoods or perhaps an evolution of humanization-themed campaigns already in play. After all, it can't hurt to tell customers that feeding good-quality petfood not only can increase their pets' lives but also potentially their own. ●

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

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Industry News

Quick hits

- ▶ Denmark-based Haarslev A/S introduced a new corporate brand, Haarslev Industries.
- ▶ Clextal announced the opening of a new subsidiary in Australia.
- ▶ Australian pet products company Pets Palace is launching a line of natural mineral water for dogs.
- ▶ Wellness Natural Pet Food is sponsoring Romeo the Cat, a new online fundraising effort for animal welfare and rescue.
- ▶ Weruva was a 2008 Buzzillions Reviewer's Choice Award Finalist for Best Cat Food Overall and Best Cat Food for Long-Time Pet Owners.
- ▶ Nutri-Vet announced Charie Jankowski as its new project coordinator.
- ▶ Global Pet Foods announced the expansion of Nature's Harvest to now include grain-free petfood and biscuits; it also launched a hypoallergenic petfood and biscuits line.

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While you're at it, why not visit us at www.twitter.com/petfoodindustry and follow along as our editors tweet about the latest, up-to-the-minute news. Get online and get going!

Greenies restricted to vets, specialty retailers

Nutro Products Inc. has restricted the sale of Greenies canine and feline dental chews to veterinary hospitals and pet specialty retailers.

Pet owners suggested that the treats were too difficult to digest because when some pets swallowed the chews whole, the treats became lodged in the pets' throats.

However, the company created a new Veterinary Oral Health Council-approved, 96% digestible formula for the chews in 2006. Since the reformulation, no problems with the chews have been reported.

The website stated the reason for the restriction: "Each of the five sizes [of Greenies] is specially formulated to deliver the maximum dental benefit to each weight range."

"Pet medical professionals at veterinary hospitals and well-trained, knowledgeable staff at pet specialty stores are best equipped to ... make the right recommendation," said Carolyn Hanigan, vice president of marketing at Nutro.



Menu Foods stocks, sales increase

Menu Foods Income Fund reported its first gain in profits since its petfood contamination lawsuit in 2007, according to a Canadian Press article.

The company's stocks increased by 25% in the first quarter of 2009 to a 52-week high of CAN\$1.68 (US\$1.44) on the TSX.

Sales also increased from CAN\$55.6 million (US\$47.75 million) to CAN\$84.1 million (US\$72.2 million), which the company attributed to three price increases as well as a 6.7% rise in the volume of can and pouch sales, according to the article.

Going green



Canidae plant runs on wind power

Canidae All Natural Pet Foods is going green by manufacturing its Snap-Biscuits and Snap-Bits dog treats at a wind-powered facility in Oklahoma, USA.

Thirty-four towers and turbines, with massive 110-foot blades, combine to produce 50 megawatts at peak output.

Canidae saves about one pound of coal for every kilowatt-hour generated by wind, according to the company.

Purina plant uses solar power

Nestlé Purina PetCare officially unveiled and dedicated a new solar-panel array May 14 at the company's petfood plant in Denver, Colorado, USA, according to the *Denver Business Journal*.

The array is comprised of 467 panels and covers about 21,000 square feet on the roof of the plant.

About 100 kilowatts of power are produced by the panels – approximately 1% of the plant's electricity needs.

"It makes Nestlé Purina the first petfood manufacturer to use any kind of renewable energy directly in the production of our petfood," said Tom Plymell, operations performance manager at the plant.

If the system works well, Purina will consider putting solar systems on its dry petfood plants in Flagstaff, Arizona, USA, and Maricopa, California, USA, according to the article.

Novus receives LEED certification

Novus International Inc.'s new global headquarters in St. Charles, Missouri, USA, received the Plati-

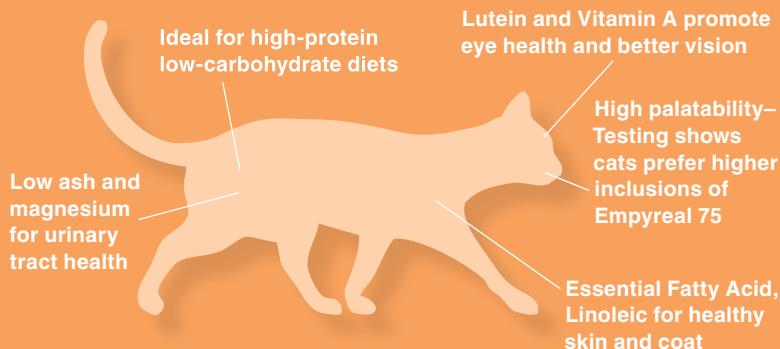
num LEED certification by the US Green Building Council in April, according to the company.

The 90,000-square-foot building has an under-floor air distribution system and solar panels spread over

a 5,000-square-foot area.

The headquarters includes 10 research labs, a fitness center and a cafeteria, in addition to office space. Much of the material used came from salvaged and recycled content.

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Mars Petcare expands in New Zealand. Mars Petcare is expanding its work schedule at its New Zealand plant from three shifts to four to handle increased demands in Australia, according to an article in the *Wanganui Chronicle*.

Mars plant manager Colin Fergus said some growth came as the result of a new product – a protein innovation his company developed with AgResearch and Massey University.

“This project and growth in demand for our product were linked,” he said in the article.

Mars has seen demand increase by 3,000 tons this year alone, requiring the plant to hire 40 more employees to run a new 24/7 shift schedule, according to Fergus.

“A four-shift operation would give us the capacity to produce 19,000 tons of petfood, but if we continue to see the growth that we’re now experiencing, then we’d expect to consume that volume by the end of 2010,” Fergus said in the article.

Mars supports New Zealand research group. Protein Innovation New Zealand, a research consortium aiming to advance meat science for pet care, was launched by AgResearch, Mars and Massey University in Wanganui, New Zealand, on May 8.

The consortium’s mission is to better understand the protein interactions and nutritional contributions of raw meat materials and how this knowledge can contribute to the development of highly nutritious petfoods. “The partnership promises further significant benefits in animal and human nutrition as well as in health sectors,” said Erica Nicholls, the group manager of investments at New Zealand’s Foundation for Research, Science and Technology, a supporter of the partnership.

**Target:
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Vegan-based pets diets gaining popularity

Vegan-based diets for pets are gaining in popularity as some vegan owners are deciding that they want their pets to adopt a similar diet to their own. Mainstream public opinion, including other vegans, hasn't offered much support, given the fact that dogs are omnivores and cats are carnivores: Some require nutrients not found in human diets, vegan or otherwise.

Despite this fact, some petfood companies have made their niche selling vegan petfood, such as the Minnesota-based Evolution and Canada-based Medi-Cal Royal Canine.

Some veterinarians are skeptical of the idea, pointing to the fact that owners and their pets are completely different species, each requiring their own specialized diet and nutrition.

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June

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IFT Annual Meeting and Food Expo

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

July

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27	28	29	30	31		

AVMA/AAAP Annual Convention, July 11-15, 2009,

Seattle, Washington, USA. Contact: AVMA, 1931 N. Meacham Road, Suite 100, Schaumburg, Illinois 60173 USA, Tel: +1.847.925.8070, Fax: +1.847.925.1329, avmainfo@avma.org, www.avma.org.

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

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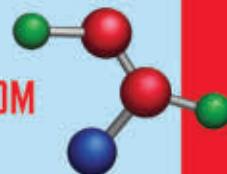
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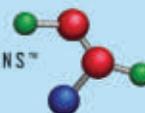
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« Raw bones

Bravo! now offers Bag-O-Bones, fresh frozen, raw bones made with all-natural beef and buffalo marrows and knuckles. Each is individually wrapped and packaged in freezer-grade reclosable bags. The bones are made in Bravo's USDA facility with human-grade, hormone-free, grass-fed red meats, according to the company. www.bravorawdiet.com

Wafer treats »

Nutri-Vet Sensitive Care Wafers are grain-free and made with duck and potatoes. The treats contain no artificial colors, preservatives or flavors, according to the company. They're meant to promote a healthy, glossy coat for dogs. www.nutri-vet.com



« High value dog, cat food

Natura Pet Products offers HealthWise, dog and cat food designed with affordability in mind. Ingredients in the food are all-natural and include flaxseed and herring oil, according to the company. Carbohydrates such as whole oatmeal, barley and brown rice also are used in the line. www.naturapet.com

Chicken treats with goat's milk »

Canus Goat's Milk is adding a new, all-natural chicken treat to its Nature's Dog line made with fresh goat's milk. The treats are made with barley, brown rice and flaxseed and are free of wheat, corn and soy. They contain no preservatives, artificial colorings, flavorings or animal by-products, according to the company. www.canusgoatsmilk.com





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As good as it gets

Precise Pet Products wants you to know it as the independent, pet specialty store petfood manufacturer

BY JESSICA TAYLOR

Business basics

Headquarters/ Facilities: Nacogdoches, Texas, USA

Officers: Bud Wright, president & CEO; Mike Compton, vice president, operations; Kirk Young, executive vice president; Gary McEuen, CFO

Brands: Precise and Precise Plus

Distribution: Worldwide

Employees: 130+

Website(s): TexasFarmProducts.com; PrecisePet.com

Precise Pet Products has graced our cover before: Bud Wright poses with a 1978 issue featuring the Precise plant at that time.

Precise Pet Products, a division of Texas Farm Products, is a US-based manufacturer that strives to be known for its consistent quality controls, single source suppliers of ingredients and the company's integrity in manufacturing.

When asked what sets Precise apart from the competition, Bud Wright, president and CEO of Texas Farm Products, says: "Our US-based, family-owned company's complete reliance on petfood manufacturing sets us apart. We do not have a chocolate division, cosmetics division or other divisions to rely on; therefore, our dedication to petfood manufacturing excellence sets us apart. We are known as the independent, pet specialty store petfood manufacturer."

Taking strides

"Precise is poised to take independent retail shelf space away from other brands that are making strategic decisions to move into other retail formats," continues Wright. This means Precise will be taking on a bigger role and stance in maintaining its dedication to the independent retail store business across the country, which the company sees as its biggest opportunity.

The Precise brand was completely repackaged in 2008 with new graphics, new point-of-sale materials and support programs. In addition, the new formula Lamb & Sweet Potato was introduced and quickly ascended to rank among the company's top 10 products in just one year.

According to Wright, overall the product is doing well; consumer response has been very favorable for palatability, pet acceptance and digestibility. Even with all the good news and success Precise has been experiencing, the consumer petfood market is trending down in price, according to Wright. The petfood manufacturer knows times are tough for consumers and decided to do something about it. "Precise Pet Products was the first brand to lower prices to ensure pet stores kept valuable consumers shopping in their stores," Wright says.

Focus: ingredients

Precise Plus is now in the process of taking the concept of premium petfood and moving it a giant step forward, states company literature. With this new line, Precise is taking a holistic approach, using only ingredients that are all-natural, including preservatives, vitamins C and E. The company website, www.precisepets.com, invites consumers to look at the ingredients list on the Precise Plus packages. This is what they'd find:

- Protein: chicken meal, fresh chicken meat;
- Fruit: cranberries, carrots;
- Dried kelp;
- Flaxseed (canine formulas);
- Herbs: rosemary, turmeric, peppermint, dandelion and chamomile;
- Probiotics;
- Vegetable fibers (Feline Hairball Formula only);
- Ester-C brand vitamin C;
- Chelated minerals;
- Taurine (feline formulas);
- Vitamins A & E.

The company website goes on to explain each individual ingredient's benefits—leaving few questions for pet owners to have when it comes to dinner time for their pets—and that's just what Precise wants.



Focus: source

More consumers want to know who is making their pets' food and where. "Consumer surveys show that pet owners, while informed about what they feed, are increasing their knowledge and participating in questioning the manufacturers," states Wright. "Having our brand made right at our plant gives us the ability to talk specifically and directly about every step of the production process."

Although Precise was a manufacturer

affected by the 2007 recalls, Wright cites the catastrophe as bringing the manufacturer in sync with its suppliers. "It has brought a closer working relationship with ingredient suppliers so now we can keep up with the changing requirements of each state, country or regulatory body. In short, you



Precise Pet was the first brand to lower prices to ensure pet stores kept valuable consumers shopping in their stores, says Bud Wright, president and CEO of Texas Farm Products.

must be working in tandem with your suppliers to make sure your process flow is seamless.”

Fetching the future

As far as plans for the future are concerned, Wright says: “We have the right people in place and new plans in development to ensure continued company growth in the years to come. We have very strong new product ideas

for the future, and our facility is getting upgrades to accommodate all these products.”

Capacity issues will become an increasing problem for many brands that outsource the manufacturing of their products, speculates Wright. “Here we have the capacity and footprint to triple our output as we continue to grow. In addition, the increase in regulatory controls will place added burdens on many older plants that have had ingredients run through their facilities that are no longer acceptable.” For instance, beef products and certain other ingredients may hinder certain plants from shipping to other countries, Wright points out.

Texas Farm Products is well positioned for most global markets, currently shipping to more than 40 countries around the world.

Most recently Precise added a few senior management members—who happen to be industry veterans—to its roster. “The biggest asset we have is our



By making the Precise Pet brand right at its plant, the company has the ability to talk specifically and directly about every step of its production process.

long-term employee base,” Wright says. “We are a leading employment provider in Nacogdoches, Texas, and are lucky to have employees who have been with us for generation after generation.” ●

Precise is poised to take independent retail shelf space away from other brands.

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What retailers want—and need

Strong branding, communication and education can help pet retailers sell more of your products

BY RICK ROCKHILL

Consider this scenario: A consumer just adopted a dog and needs to find food. She heard it is important to start her puppy off right. But, right according to whom?

She is faced with the largest assortment ever of petfood brands. (I use “she” because most petfood buyers are women.) It’s overwhelming and difficult to make comparisons. And I have news for you: The educated consumer is just as confused.

We’re not just selling petfood. We’re in the relationship business with pet parents. So explaining what retailers want from the petfood industry starts with what the customer wants and needs from us.

Trust is the bottom line

We know our customer:

- ▶ Is willing to pay for quality products that deliver results;
- ▶ Is asking questions and reading

- labels. Ingredients matter to her now more than ever;
- ▶ Remains concerned about product safety and relies on company reputations. It is critical to earn and maintain her trust.

Our customer is very resourceful and gathers information from a variety of sources. Certainly her experience at the retail level plays a major part, as does what your product label communicates. She may also be influenced by vets, breeders and shelters, but more than ever, the word of friends, family and complete strangers are influencing her opinion of us all. You may

know these strangers she trusts—yes, it’s the millions of invisible faces on the Internet.

While today’s petfood consumer seeks information from individual brand and retailer websites, our research shows she is leery of what

Pet parents trust and listen to each other and can get their questions answered easily by reading an online review.

Overall Rating: 5 of 5	Best Puppy Food A+	Date: April 26, 2008
Written By: MyYorkieBuddy (San Diego, CA)	"I highly recommend this food to any dog owner who wants to give their dog the best nutrition! Plus less clean-ups for us!! Great Product!! I've tried plenty out there. Try it!"	
Overall Rating: 5 of 5	great food	Date: April 23, 2008
Written By: sweetpea2078 (FL)	"My puppers seem to be a little picky about eating healthy, but they loved this."	
Overall Rating: 5 of 5	this stuff is good too	Date: March 19, 2008
Written By: Anonymous Reviewer (wisconsin)	"Have friends created puff the one that has far it is about 18 weeks old kites is the same. Litter went out its food anymore cats dog food dogs gets bath every weekend far is so soft no skin problems out lives to pull up next to him can you say two birds with one stone"	
Overall Rating: 5 of 5	My dog loves this	Date: March 9, 2008
Written By: Standardpoodleman (Tulsa, OK)	"Tried several brands on my new puppy. This was the only one she liked. Her coat looks better, too."	



Today's customer is very resourceful and gathers information from a variety of sources, including at the retail level from product packaging and store associates.

your company says on its site and places more weight on what she reads online in independent views, blogs, message boards and customer reviews. The fact is, pet parents trust other pet parents; 70% of customers surveyed said that when it comes to petfood, they believe their peers more than an authority.

6 wants, 5 needs

As a retailer, I want your website to tell your story and tell the customer what she needs to know. To sell more of your products, I also **want** you to:

1. Know your target consumer and how she perceives your brand;
2. Effectively communicate your brand position and role;
3. Know your competition—what is your point of difference? How does your cost per pound compare? Use syndicated data for trends and talk to store associates;
4. Decide how to explain your

Among Petco's 1,000 locations, most have a store-within-a-store natural shop dedicated to natural, organic and holistic petfoods.

12 things retailers need from you

Besides the five areas described in the article, you need to provide:

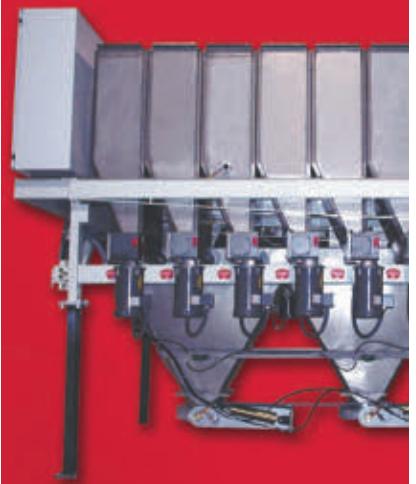
1. A well-defined brand with a unique value proposition;
2. Clearly communicated product features;
3. Innovative formulas with meaningful benefits;
4. Formulations with high-quality ingredients;
5. Safety testing (with test results that are easily accessible and understandable);
6. Designs to keep pets happy and healthy;
7. Manufacturing with sustainable practices;
8. Packaging and shipping that ensure freshness;
9. Good marketing to drive customers into the pet specialty channel;
10. Informative training materials, websites and resources for the consumer;
11. Visible evidence that you're a vendor partner who cares about animals and the industry;
12. A mutual goal to deliver better-than-average profits.

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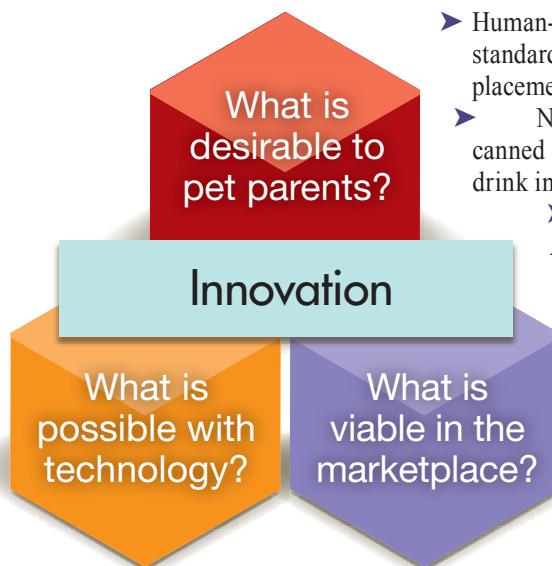
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Consumers embrace new technology when it offers obvious benefits, solves a problem or meets a need.

formula—ingredients and message matter;

5. Have a distinct marketing strategy—a comprehensive, well-funded, well-developed plan (in the absence of information, retailers will make it up!);
6. Plan collaboratively—partner with retailers to customize tactics. Understand differences in your retail customer base.

I also **need** your help in these five key areas:

1. Industry standardization on the basics;
2. Meaningful advances in petfood technology;
3. Partnering to educate our customers;
4. Collaboration to drive out unnecessary costs;
5. Going green together.

Standardize the basics

To help you better sell your products, we retailers are seeking industry standardization on:

- ▶ UPC code placement on bags (picture a slightly built sales associate having to lift, turn over and rotate a 40-pound bag of dog food to find the UPC);

- ▶ Human-readable date codes with standardized formatting as well as placement;
- ▶ Narrow case packs for canned food—look to the soft drink industry for ideas;
- ▶ Association of American Feed Control Officials ingredient definitions—especially for by-products, by-product meals and meals. We understand you have only so much influence on this process as a petfood manufacturer, but a united industry might be able to accomplish changes.

Advance technology

History shows that innovation drives growth. Consumers embrace new technology when it offers obvious benefits, solves a problem or meets a need. Examples to date include formulations to reduce hairballs in cats or allergic responses in pets, plus products developed specifically for large or small dogs, certain breeds, indoor cats or pets with sensitive skin or stomachs.

Each of these innovations contributed to the revitalization of the premium petfood category. To continue to grow, our industry must have meaningful new advances in petfood technology. As the saying goes, innovate or die.

Educate our customers

The shift of consumer preferences toward natural petfoods is part of an evolution that started with premium and superpremium products and was influenced by lifestyle choices and the belief that natural and organic foods are safer.

Online extra!

Read more of Rick Rockhill's advice to the petfood industry and view his Petfood Forum 2009 presentation at www.petfoodindustry.com/retailerwants.aspx.

But I believe the shift also happened because these simpler formulations translate into a straightforward and easily understood message and ingredient deck. This has lessons we can apply to educating customers about petfoods:

- ▶ Use honest ingredients and formulas;
- ▶ Make clear product claims;
- ▶ Avoid misleading terminology;
- ▶ Partner with retailers on training materials;
- ▶ Hire only ethical in-store demonstrators; and
- ▶ Do not resort to negative selling vs. other brands.

Let me be clear: Negative selling techniques are not only bad for business but also undermine the entire superpremium petfood industry. Customers get confused by the contradictory statements and are not sure whom to believe.

Drive out unnecessary costs

The pet retail and petfood industries should partner to reduce costs in areas such as assortment productivity, demand management, supply chain management, distribution and commodities and raw ingredients.

Let's go green together

Our customers have come to expect us to be environmentally conscious. While it may not drive the initial purchase decision, it reinforces the customer's choice and endears loyalty to your brand. The actions are to reduce, reuse, recycle, review packaging and carton use and follow sustainable practices in our plants, distribution chains and corporations.

You'll find another succinct list of our needs in "12 things retailers need from you" (p. 25). We're committed to the petfood industry, so please read these in the spirit of our wanting to help you continue to thrive. ●

Rick Rockhill is VP/division merchandise manager of dog consumables for Petco, www.Petco.com.



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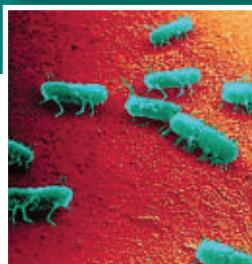
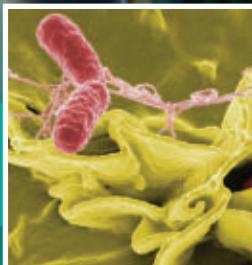
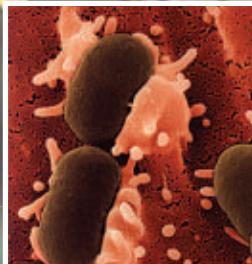
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New weapons against contaminants

Say sick 'em to *Salmonella* and other disaster-causing impurities by implementing the latest technology and processes

According to the US Centers for Disease Control, from 2006 through 2008, a total of 79 cases of *Salmonella* infection were linked to dry petfood.

BY JESSICA TAYLOR

As food safety issues continue to remain a hot-button topic, it's up to petfood and treat manufacturers to start implementing procedures that ensure the safety of their products to the consumer and their pets. According to the US Centers for Disease Control (CDC), from 2006 through 2008, a total of 79 cases of *Salmonella* infection were linked to dry petfood. Far less costly than a recall, evaluating your current procedures now and executing new

procedures and standards is the only way to protect your brand, as well as the pets consuming the product. So where should you begin?

Electronic nose analysis

According to a recent study at the Animal Nutrition Department of Veterinary Sciences and Technologies for Food Safety at the University of Milan, Italy, the increased focus and interest in pets' health and welfare make it essential that petfood complies to specifica-

tions ensuring good nutrition, as well as prevention and treatment of cat and dog diseases. There is an increasing need for new technologies and applications for existing technologies for a more comprehensive screening of petfood. A recent technique, based on the use of a technology called the electronic nose, may represent a promising analytical approach by providing quantization of quality and safety in real time with the objectivity of an instrumental response.

“An e-nose is an instrument that comprises an array of electronic chemical sensors with partial specificity and an appropriate pattern recognition system, capable of recognizing simple or complex odors,” explains the study. The e-nose does not distinguish each volatile substance, but expresses the global odor of a product. Sensor array formats in the e-nose interact with different volatile molecules and provide an electronic signal that can be used effectively as a fingerprint of the volatile molecules associated with the product.

The application of the e-nose in the petfood industry can provide an interesting approach for quality control and qualitative protein source characterization, the study claims. Currently the main applications of the e-nose technology are in the food industry with the aim of monitoring freshness, onset of microbial spoilage or bioprocesses of food and determining food authenticity. “We can take what we know from the food industry and foresee future analytical challenges in the petfood industry,” the study’s authors say.



According to a recent study by the XIM Group, acidic calcium sulfate can lower the pH of petfoods to microbial stable and antimicrobial levels.

Fighting *Salmonella*

According to a recent study by the XIM Group, acidic calcium sulfate (ACS) can lower the pH of petfoods to microbial stable and antimicrobial levels. There are a number of unique challenges associated with control of *Salmonella* contamination of products in the petfood industry. Of primary significance is that the ingredients used for producing petfood are vulner-

able to contamination with *Salmonella* and other microbes as they arrive at the manufacturing facility, supplying a steady stream of new microbial inoculants to the processing plant.

Broadly speaking, there are two general approaches to addressing the issue of potential recontamination of



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products (after the extrusion kill-step in dry petfoods). The first is to attempt to eliminate as much as possible the potential sources of *Salmonella* recontamination.

A second approach, which is underutilized in the industry today, according to XIM, is to implement

Online extra!

To read the entire scientific report on the pHresh ingredient and what it can do to protect your petfoods, go to www.petfoodindustry.com/XIMstudy.aspx.

a means of reducing or eliminating microbial populations in products that may become recontaminated. In the food industry, one method commonly used for preserving high-water activity foods is to create

acidified foods by adding acids to lower the pH to less than 4.6.

Some petfoods, in particular soft-moist foods and treats, already use parts of this approach by utilizing the addition of phosphoric acid, hydrochloric acid or other acids to lower the pH. Generally it is used in combination with other ingredients added to control water activity. ACS is a new ingredient available to the petfood industry under the trade name pHresh from pHresh Technologies, Sabetha, Kansas, USA.

ACS can be used to lower the pH of petfoods to microbial stable and antimicrobial levels, and is available in a strength similar to phosphoric acid for this purpose.

A unique characteristic of ACS is that it does not have the strong sour flavor associated with other acids. Therefore, addition levels required

to reach a microbially stable or antimicrobial pH will not negatively impact the palatability of most petfoods, according to the company. In fact, some indicators show that the addition of ACS to certain foods, including extruded kibble or the coating of canine diets, results in increased preference. ●

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The GRAS is always greener

In April the US Food and Drug Administration (FDA) announced it will begin accepting generally recognized as safe (GRAS) notifications for ingredients for use in animal feed and petfood. Some people in the petfood industry hailed this as a positive step. Why? What does it mean for petfood?

What's GRAS?

Under FDA law, all ingredients in a food that are not approved as food additives or otherwise sanctioned must be generally recognized as safe. To be GRAS means there is sufficient publicly available information on the ingredient so experts qualified to make the determination would agree as to its safe use for its intended purpose.

GRAS status can be based on a history of safe use in food commonly consumed in the US prior to 1958 (the year the Food Additives Amendment was enacted). More often today, though, a substance is deemed GRAS on the basis of scientific procedures—for example, feeding studies

GRAS status is published in the form of a regulation. This is typically a lengthy and arduous process.

The need for speed

In 1997 the FDA proposed regulations that would eliminate its GRAS affirmation process in favor of a new notification process. Although the rules have never been finalized, the FDA has been accepting GRAS notifications for human food ingredients for the past decade. On the other hand, the Center for Veterinary Medicine (CVM) within the FDA has not been accepting either notifications or affirmation petitions for animal feed or petfood ingredients.

The FDA will soon accept GRAS notifications for petfood ingredients.

— David Dzanis



The FDA does not do an independent evaluation and does not say it agrees with the sponsor that the substance is GRAS. However, the FDA will say it “has no questions” about the sponsor’s determination. In regulatory-speak, this is the closest you can get to “no objection.”

The primary advantage of this notification method is speed, at least compared to the affirmation process; we’re talking months vs. years. Unlike the affirmation process, though, the FDA does not issue a regulation as a result of its findings. However, the agency has been publishing its findings for human food GRAS notices on its website, so whether a substance has been subject to a GRAS notification can be easily ascertained.

Why bother with a notice?

Technically, the GRAS notification process is voluntary. An interested party may conduct a self-determination of GRAS and market that ingredient without informing the FDA. However, submitting a notification has distinct advantages.

Perhaps the most important benefit is that the notice becomes known to regulators. While the notice doesn’t result in a new regulation, there will be a record of its submission to the FDA and the FDA’s response; I am assuming the submissions for use in animal feeds will be published on the Internet, the same as is currently done for human foods.

The hope is the Association of Amer-

In regulatory-speak, this is the closest you can get to “no objection.”

or other testing. Since it must be generally recognized, the bulk of this information must be in the public domain, such as publication of studies in a scientific journal.

The affirmation process is very similar to the food additive approval process in that a sponsor submits all pertinent data on that ingredient for the FDA review. When and if the FDA concurs, the ingredient’s

In the notification process, sponsors must still collect all pertinent information and conduct an evaluation to determine whether a substance is GRAS. This is usually done by convening a panel of unbiased experts in the field (e.g., toxicologists, nutritionists) to render an opinion. Assuming the panel concurs about the ingredient’s GRAS status, the sponsor notifies the FDA of its findings.

ican Feed Control Officials could also publish this list in its *Official Publication*. That way, all state feed control officials can be aware of the ingredient's GRAS status. Otherwise, state feed control officials may be reluctant to accept the findings of a self-determination and refuse registration of products containing the ingredient.

Burden of proof

The potential disadvantage of a notification is that the FDA may not agree with your determination. Instead of responding that it has no questions, it could say the submission "does not provide a sufficient basis for a GRAS determination."

That response could happen because the notice did not include appropriate data and information or because the available data and information raised questions about the safety of the notified substance. However, if a "no questions" finding appears unlikely, a sponsor can withdraw its notice before the FDA reaches a nega-

tive finding. That would allow the sponsor to conduct further evaluation and resubmit the notice at a later time.

Whether a substance is the subject of a GRAS notification or a self-determination, the burden of proof is the same. Under FDA regulations, the scientific evidence of safety must be the same quan-

Online resource

Although the Center for Veterinary Medicine does not have guidance on the GRAS notification process for petfoods posted as of this writing, the Center for Food Safety and Applied Nutrition (the entity that oversees the human food GRAS ingredient process) has very useful information posted on its website, <http://www.cfsan.fda.gov/~dms/opa-noti.html>. Links on the page explain the history, process and requirements for GRAS notifications, as well as a list of all GRAS notifications received by the FDA along with the agency's responses.

tity and quality as required for a food additive approval. In fact, a GRAS determination may be more burdensome, since the majority of the data must be publicly available, rather than from unpublished studies.

When can I notify FDA?

To implement this new process, CVM must hire new personnel to handle the increased workload. It anticipates that it will be ready to accept notifications by late summer this year. Since it is neither easy nor quick to prepare a notification, it behooves petfood companies and suppliers that may be interested to become familiar with the process now. ●

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

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Mold inhibitor of choice

Preventing the appearance of mold in foods is a constant battle, and petfoods are no exception. Everyone has experienced the gray-green mold on bread or splotches on cheese; with petfoods, many have had an encounter with “fuzzy” biscuits or green kibbles.

Unfortunately, despite our best efforts, mold is an inescapable part of food production regardless of whom the food is intended to serve. Once we exhaust all other measures, we often turn to chemical preservatives such as potassium sorbate to gain some control.

Mold: insurmountable challenge

In elementary school we learned that starting a fire requires three simple elements: fuel, oxygen and heat. A mold-bloom is similar in that it only requires three elements: food, mold spores and moisture. Because we are making food, element one is obvious. All that remains for a mold-

bloom are spores and moisture.

Mold spores are easy enough to find. The soil is loaded with them—molds are the earth’s machinery for decay and rejuvenation. Because of this, any ingredient produced from or near the ground will be inoculated

Potassium sorbate is safe, effective and one of the more popular ingredients for battling mold.

— Greg Aldrich



by billions of spores. This doesn’t just apply to grains and tubers; meats are affected, too.

Given that petfoods are produced from raw agricultural commodities, inoculation with spores is inevitable. Agronomic practices can influence the level of inoculation; for example, modern no-till practices leave more crop residue in the field, resulting in increased mold production.

Mass transit system

Seasons can affect mold counts, too. Considering that mold spores are light enough to float in the air inter-

plant serves as the mass transit system for mold spores and food inoculation.

This is exacerbated by petfood production systems that depend on repetitive additions and subtractions of water. Regardless of food or treat type—extruded dry and semi-moist or baked—we add moisture as free water, steam or part of other ingredients. Once our purposes have been achieved, we drive off that moisture with super-heated air via dryers and ovens.

The only purpose behind drying is to decrease the water activity to a point that it limits microbial growth. Unfortunately, achieving just the right level of heat and dryness while not overcooking or damaging the food is tricky. Sometimes if we err on the side of saving a little energy by drying less, or if problems occur with the dryer or oven controls, or if we have product “case-hardening” that prevents moisture escape from the interior of the food piece, the water activity may be high enough for mold to occur.

Solution: a final barrier

So, because all the elements for a mold-bloom are lying in wait for any minute lapse in sanitation or process

Mold is an inescapable part of production regardless of whom the food is intended to serve.

bloom are spores and moisture.

Mold spores are easy enough to find. The soil is loaded with them—molds are the earth’s machinery for decay and rejuvenation. Because of this, any ingredient produced from or near the ground will be inoculated

minably, harvesting grain in the fall can release them into the air. Case in point: *Alternaria* mold counts are often reported with the weather as part of autumn allergy alerts. The net effect is that the air we use to cool and dry our products in the manufacturing

control, a final barrier or hurdle is essential if we are going to prevent it from overtaking our products. One of the more popular ingredients for this role is potassium sorbate.

Chemically, this substance is the potassium salt of sorbic acid (2,4-hexadienoic acid), a fatty acid and naturally occurring compound that was first isolated from unripe rowan berries from the European Mountain Ash. (It is the Latin name of this shrub, *Sorbus aucuparia*, from which sorbic acid derives its name.)

Common petfood applications of potassium sorbate are 0.1-0.3% in baked treats, intermediate moisture or semi-moist foods and treats, and higher levels in liquid ingredients such as flavor digests. Its salts are more water soluble than the sorbic acid alone, which may explain its greater popularity. Sorbic acid is more effective as the pH drops below 6.5 and has a pKa of 4.75 (the pH at which half the molecule is undissociated). Plus, at common food pH, sorbic acid is more potent than other organic acids such as the propionates or benzoates.

Interrupting the outgrowth

The active agent, sorbic acid is thought to work by interrupting the outgrowth of the vegetative microbial cells through disruption of nutrient transport across the cellular membrane and (or) by disrupting critical enzyme systems necessary for internal microbial cell homeostasis. These mechanisms affect microbial cells of fungi, including those that produce mycotoxins, many types of yeast and numerous types of bacteria, especially vegetative species, but not mammals.

When ingested by mammals, sorbic acid, like other fatty acids, is metabolized to CO₂ and H₂O. In a report on toxicity of various food additives, no ill effects were noted in dogs which were fed diets, for three months, in which potassium sorbate was included at up to 2% (FAO, 1967).

The authors also noted that rats tolerated a huge dose of potassium sorbate of up to 10% of the diet, with a rat LD50 that exceeded 4,920 mg/kg body weight. In other words, by commonly accepted toxicology methods, potassium sorbate is considered very safe.

Directly synthesized in modern facilities

Sorbic acid is said to occur naturally in fruits other than rowan berries, but evidence of meaningful quantities is limited. Today, the majority of the ingredient intended for commercial use is produced by direct synthesis in modern dedicated chemical facilities, many of which are located in China.

Synthesis of sorbic acid is carried out by condensing crotonaldehyde and malonic acid in a pyridine solution. The yield can be increased by condensing crotonaldehyde and ketene in the presence of boron trif-

luoride (Merck, 1997). Potassium sorbate is produced by the reaction of equimolar potassium hydroxide with sorbic acid and recrystallized with ethylene hydroxide.

Potassium sorbate is a white to off-white granulated crystal or fine powder. It is most often packaged in a polyethylene bag within a cardboard box. The commercial product is traded at more than 99.0% potassium sorbate on a dry-weight basis, and specifications commonly call for maximum levels of ash, sulfates and heavy metals. It is a safe and effective choice for inhibiting the growth of mold in ingredients or petfoods. ●

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

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The dogness effect

The trend toward pet humanization and pampering supports product premiumization and is the No. 1 driver in the US petfood market. So when Nestlé Purina decided to poke fun at pampered pets in a high-profile ad campaign, it was not without risks.

Launched in spring 2009, the “Quick, get that dog some Alpo” program features pooches pampered to the extreme, including a dog in a tub with cucumber slices soothing its eyes and an undignified-looking Afghan with rollers in its fur. “Lost!” cry out posters referring to dogs like Spike, who was last seen sporting flashy duds and a sequined collar.

The campaign’s interactive online features (www.alpo.com) include a “Fifi Test” through which pet owners can gauge their pet’s “dogness” and a film documenting the “rescue” of overpampering-endangered canines. The point (aside from the obvious one of selling Alpo) is that America’s dogs are in danger of losing touch with their true canine nature, a tragedy that can be averted by simply feeding them “real meat Alpo.” Ergo the tagline, “Real dogs eat meat.”

Meaty proposition

The campaign is effective on multiple levels:

- ▶ Due to its tongue-in-cheek approach, it probably manages to avoid offending even the most zealous pet pamperer;
- ▶ Through its reliance on billboards and online media, it delivers both cost savings (to the advertiser) and heavy-duty visual clout;
- ▶ It calls attention to a value brand that some would argue can’t hold a candle to all those superholistic/human-grade products out there these days, except in this way: It costs a whole

Though humorous, the theme is rife with underlying messages that should be taken seriously.

lot less—83 cents (US) a can to be exact, according to Information Resources Inc. InfoScan Review data for supermarkets, drugstores and mass merchandizers other than Walmart (week of October 5, 2008).

That’s below the wet dog food unit price average of US\$1 and the unit price of Purina’s own Beneful Prepared Meals (US\$1.82) and way below the prices of ultrapremium brands like Pet Promise (US\$3.21). For dog owners during these tough economic times, saving that kind of money on a product promising real meat and “re-caninization” may seem like, well, a meaty proposition.

Commenting on the campaign to *Advertising Age* (February 7, 2009),

Dean Hanson, art director at Minneapolis, Minnesota, USA, ad agency Fallon, explained, “It seemed like a natural to take this very solid substantial dog food and say it’s time to wake up and get back to fundamentals” since “everybody is guilty of putting human personality on dogs.”

The next big thing?

Indeed, Packaged Facts believes Fallon may very well have (inadvertently?) touched on one of the next big things in pet ownership and product marketing: a swing away from the fashion of treating pets like people in ways that are not the healthiest for either the pet owner or the pet.

As Martin Deeley, veteran dog trainer and president of the International Association of Canine Professionals, notes in his introduction to celebrity dog trainer Cesar Millan’s bestselling *Cesar’s Way*: “Dogs are not small humans ... Dogs are dogs, and we need to respect them as dogs. We do them a huge disservice by treating them like humans and thus create many of the bad behaviors we see today” (an assessment with which, by the way, Millan agrees).

So then, will we be seeing a shift away from anthropomorphism, toward encouraging our dogs to be dogs and our cats to be cats? Absolutely, Packaged Facts predicts, based in part on the fact that, in the area of pet nutrition, we already are.



Nestlé Purina’s ad campaign for Alpo carries some risks, considering humanization and pampering comprise the top trend driving the petfood market.

Where the trends begin

One potent indicator of this trend is growing consumer interest in raw/frozen foods designed to mimic as closely as possible what pets would eat in the wild, driven by activity in the pet specialty channel—where the big petfood trends almost always begin. According to our July 2008 report, *Fresh Pet Food in North America: The Raw/Frozen, Refrigerated and Homemade Wave*, sales of fresh petfood including raw/frozen foods will make double-digit annual percentage gains through 2012.

Find more online!

Read about the concept of feeding pets the way they would eat in the wild at www.petfoodindustry.com/PetfoodGoesWild.aspx.

Also playing the wild card are a number of marketers fielding dry petfood, including Eukanuba with Naturally Wild; Canidae, via ingredients including salmon; and Taste of the Wild, whose High Prairie Canine formula features bison and venison. Mars' Whole Meals dog food encourages dogs to interact with their food much as they would with a bone, in keeping with the practice of their spokesperson—celebrity veterinarian Marty Becker, DVM—to encourage the use of food puzzles to promote foraging.

In other words, funny though it may be, Nestlé Purina's "dogness" theme is rife with underlying messages that should, Packaged Facts believes, be taken quite seriously. ●

Information provided by Packaged Facts (www.packagedfacts.com), based on reports including US Pet Market Outlook 2009-2010: Surviving and Thriving in Challenging Economic Times (March 2009) and Pet Food in the US: Health, Humanization and High Quality Ingredients in an Increasingly Value-Driven Global Market (January 2009).

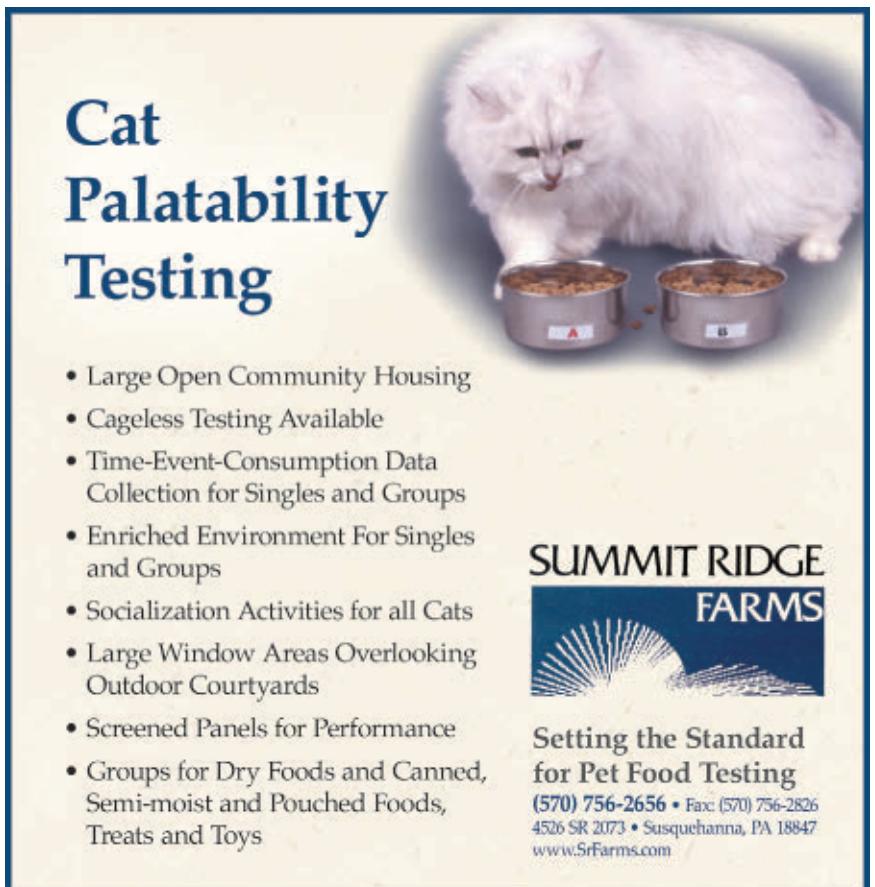


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Research Notes

Key Concepts

- ▶ **Oxidized fat for racing Greyhounds**
(JAPAN 93:144. doi:10.1111/j.1439-0396.2009.00921_6.x) Oxidation should be considered as one possible explanation for an increase in serum alkaline phosphatase during a diet trial.
- ▶ **Oxidative stress in diabetic cats**
(JAPAN 93:145. doi:10.1111/j.1439-0396.2009.00921_8.x) Despite strong association of diabetes mellitus with oxidative stress in humans, this simple relationship is not found in diabetic cats.
- ▶ **Dogs in community households**
(JAPAN 93:143-144. doi:10.1111/j.1439-0396.2009.00921_5.x) Further research and analysis will be required to elucidate relationships between health status and dietary patterns in dogs.

Oxidized fat for racing Greyhounds

Racing dogs are often fed raw meat, which may become oxidized. Few studies have examined the effect of feeding oxidized food. This study was originally designed to determine the effect of different concentrations of dietary fat on Greyhound performance. After the experiment had been completed, it was discovered that the peroxide values of both diets were elevated, indicating that fat oxidation had been present.

The study compared performance and blood parameters in eight trained Greyhounds fed either a high fat moderately oxidized (HFMO) diet or a medium fat highly oxidized (MFHO) diet for eight weeks. Dogs were raced over 500 m twice weekly. Dogs fed the MFHO food ran 0.04 m/s slower ($p = 0.06$) and serum alkaline phosphatase concentrations were higher (149 vs. 56 U/L; $p < 0.0001$) than in dogs fed the HFMO diet. Further evaluation is needed to determine whether lower dietary fat or increased oxidation was responsible for the altered perfor-

mance, but oxidation of the food should be considered as one possible explanation for an increase in serum alkaline phosphatase during a diet trial.

Source: R.C. Hill, *et al.*, 2009. Oxidized dietary fat, alkaline phosphatase concentrations and performance in racing greyhounds. JAPAN 93:144. doi:10.1111/j.1439-0396.2009.00921_6.x

Oxidative stress in diabetic cats

Increasing evidence implicates oxidative damage in the progression and complications of human diabetics. This study assessed antioxidant status and oxidative stress in cats with diabetes mellitus (DM, $n = 10$) and a control group ($n = 10$).

Alpha tocopherol was increased and gamma tocopherol was decreased in diabetic vs. control cats. Fructosamine was greater in diabetic vs. control cats. Antioxidant status/oxidative stress was not associated with glycaemic control in diabetic cats.

Despite strong association of DM with oxidative stress in humans, this simple relationship is not found in diabetic cats. They have both increased and decreased parameters of systemic oxidative stress compared with control cats. This may be due to higher levels of antioxidants in feline therapeutic diets, the relatively short duration of disease in cats or other factors.

Source: J.R. Smith, *et al.*, 2009. Antioxidant status and biomarkers of oxidative stress in cats with diabetes mellitus. JAPAN 93:145. doi:10.1111/j.1439-0396.2009.00921_8.x

Dogs in community households

The purpose was to investigate the feasibility of performing an epidemiological analysis of dietary patterns and health of dogs living in community households. The study included 50 humans and their canine companions. Questionnaires administered to the 50 participants included questions on demographics, activity, diet recall, food frequency and general health. Three-day food recalls were validated against food frequency data.

The results revealed 24% of canines enrolled were diagnosed as obese by their veterinarians, which was consistent with self-reported weight status, where 11 subjects reported an overweight dog (22%). Of the 50 respondents, 38 stated their companion animals were at an ideal weight (76%) and one stated the companion animal was slightly underweight (2%). The majority of companion animals were standard to large size (32%). The average age of the dogs sampled was 5 years.

The majority of subjects fed their canines treats daily (94%). Also a majority fed a premium, commercially available dry dog food, with another 14% feeding a commercially available specialized diet and one respondent feeding a prescription diet. Further research is needed to elucidate relationships between health status and dietary patterns in dogs.

Source: R.A. Heuberger, K.D. Glassman, 2009. Survey of dietary patterns and health in community dwelling canines. JAPAN 93:143-144. doi:10.1111/j.1439-0396.2009.00921_5.x

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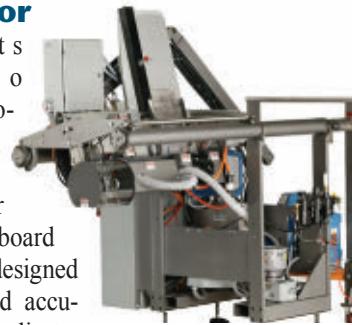


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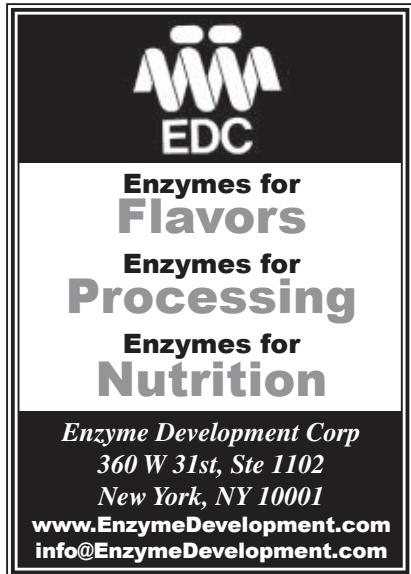
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