

September 2009

Petfood Industry

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Tasty and healthy

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All in the family

Ken Nelson, Bob Perszyk and Charlie Nelson of Tuffy's Pet Foods, p. 26

Riding out the recession

The age of convenience



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Features



38

26 All in the family

By Debbie Phillips-Donaldson

Tuffy's Pet Foods succeeds by working family to family and doing the small things right.

30 Riding out the recession

By Jessica Taylor

The tide continues to turn in favor of the petfood market thanks to natural, wellness and new products making waves.



44

38 Tasty and healthy

By Debbie Phillips-Donaldson

Many of today's palatants also deliver nutritional or functional benefits to petfood.

44 The age of convenience

By Jessica Taylor

Single-serve, pouch, resealable, easy-open and easy-carry are buzzwords pet owners are looking for in their petfood packaging.

Departments

6 Something to Chew On

By Debbie Phillips-Donaldson

50 Petfood Insights

By David Dzanis, DVM, PhD, DACVN

52 Ingredient Issues

By Greg Aldrich, PhD



26

On the cover: Ken Nelson, president; Bob Perszyk, traffic and warehouse manager; and Charlie Nelson, VP of sales for Tuffy's Pet Foods.

Photo by Joel Butkowski (www.bdjphoto.com)

10 — Industry News

24 — New on the Shelves

58 — Market Report

62 — Research Notes

63 — Product News

64 — Market Place

68 — Advertisers' Index

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Q&A: Tuffy's in-depth

Check out the full interview with Tuffy's Pet Food.

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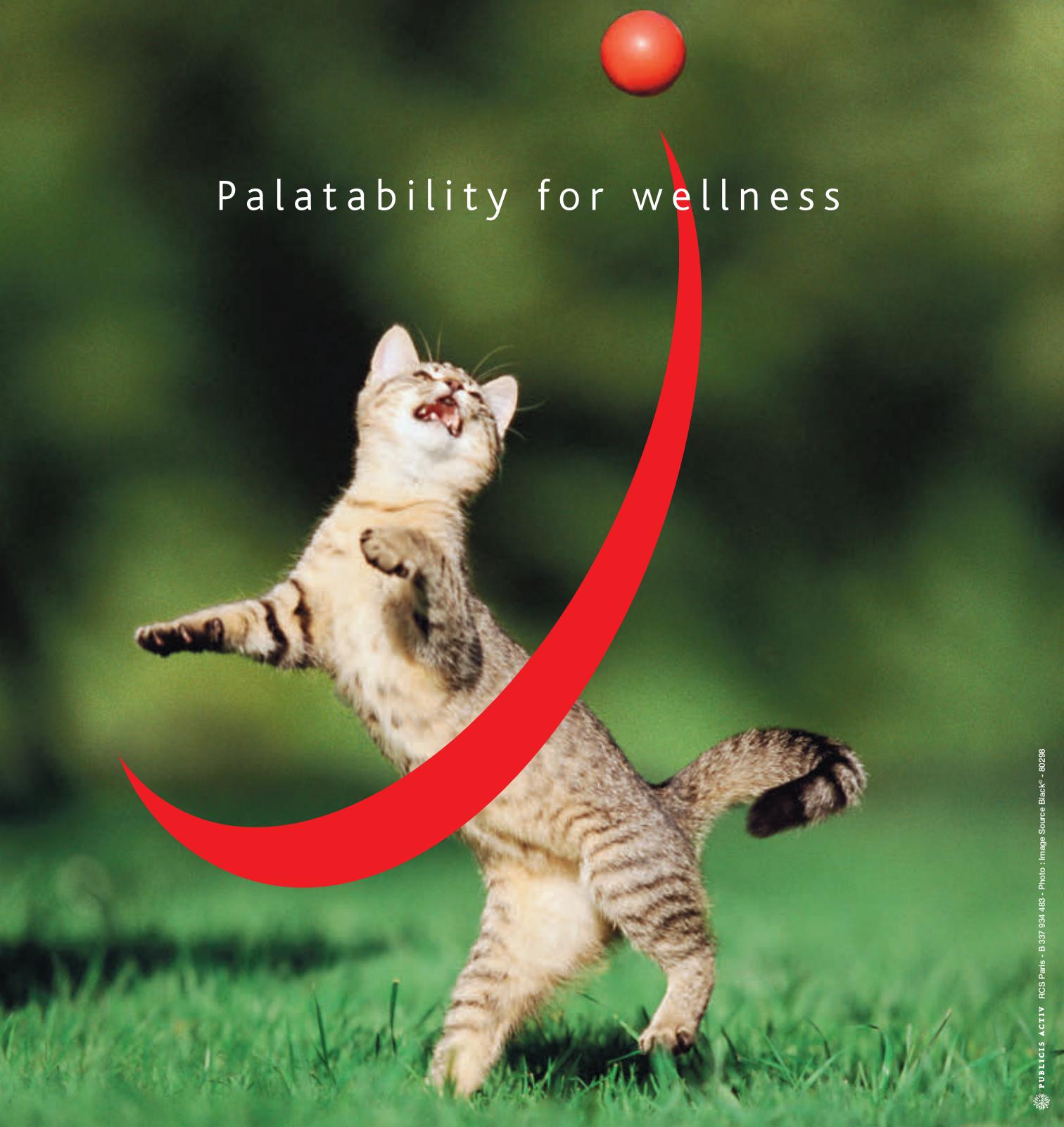
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Getting ahead of food safety regulation

Recently someone described to me what he sees as two basic regulatory approaches:

- ▶ If it's done right, all will be right—which seems to be the European Union (EU) model; or
- ▶ If all turns out all right, it must have been done right—the US approach.

Granted, this is a very simplistic view of a very complicated issue. But it resonated with me in light of the food safety legislation pending in the US Congress.

Inspired by recalls

Though just passed by the US House of Representatives at the end of July, H.R. 2749 could be said to have been inspired at least partially by the petfood recalls of 2007. That string of events—and consumer reaction to them—along with a series of human food safety crises such as *E. Coli*-contaminated produce, led Congress to enact the Food and Drug Administration (FDA) Amendments Act of 2007, imposing new responsibilities on FDA. That included establishing a registry for food and feed companies to report incidents of adulteration (see p. 50).

Shortly after the act's passage, an Interagency Working Group on Import Safety appointed by then US President George W. Bush called for greater recall authority for FDA. After widespread *Salmonella* contamination of peanut products and other crises over the past year, President Barack Obama appointed a new Food Safety Working Group to recommend ways to upgrade laws and better coordinate the myriad US agencies with food safety oversight (11 besides FDA).

All the crises, legislative efforts and work of these groups fed into the new House bill, which would give FDA

You can benefit in the marketplace, no matter what legislation is in effect.

— Debbie Phillips-Donaldson



mandatory recall authority. The bill would also require more frequent inspection of processing plants and for companies to keep better safety records. Part of the financing for all this would come from a US\$500 annual fee for food producers.

Move to influence

While nothing will happen until the US Senate tackles its own version of a food safety bill, criticism of the House bill has included concerns that the producer fees and other new fees such as for reinspection will be passed on to consumers in the form of higher food prices.

The American Feed Industry Association (AFIA, www.afia.org), which said it had input on the House bill—and a seat in the Food Safety Working Group—claimed success in “creating a series of firewalls between food and feed requirements, so any requirements specific and appropriate to human food regulation would not inadvertently impede the manufacture of livestock feed and petfood,” read an AFIA press release.

But the association also urged its members and other industry professionals to carefully monitor food safety legislation as it moves forward. “It’s vital for the livestock feed and petfood industries to be deeply involved in the evolution of these bills,” said Joel Newman, AFIA president and CEO.

By consumer demand

With health care reform and climate change taking priority for the US government this fall, the Senate bill is unlikely to move forward very quickly. But eventually some form of legislation will probably pass and be signed into law by Obama.

That law will be neither as sweeping as its proponents want nor as onerous as its critics fear. And it will likely not do everything right, as EU rules attempt, nor will it guarantee everything turns out all right, as US laws aim to do.

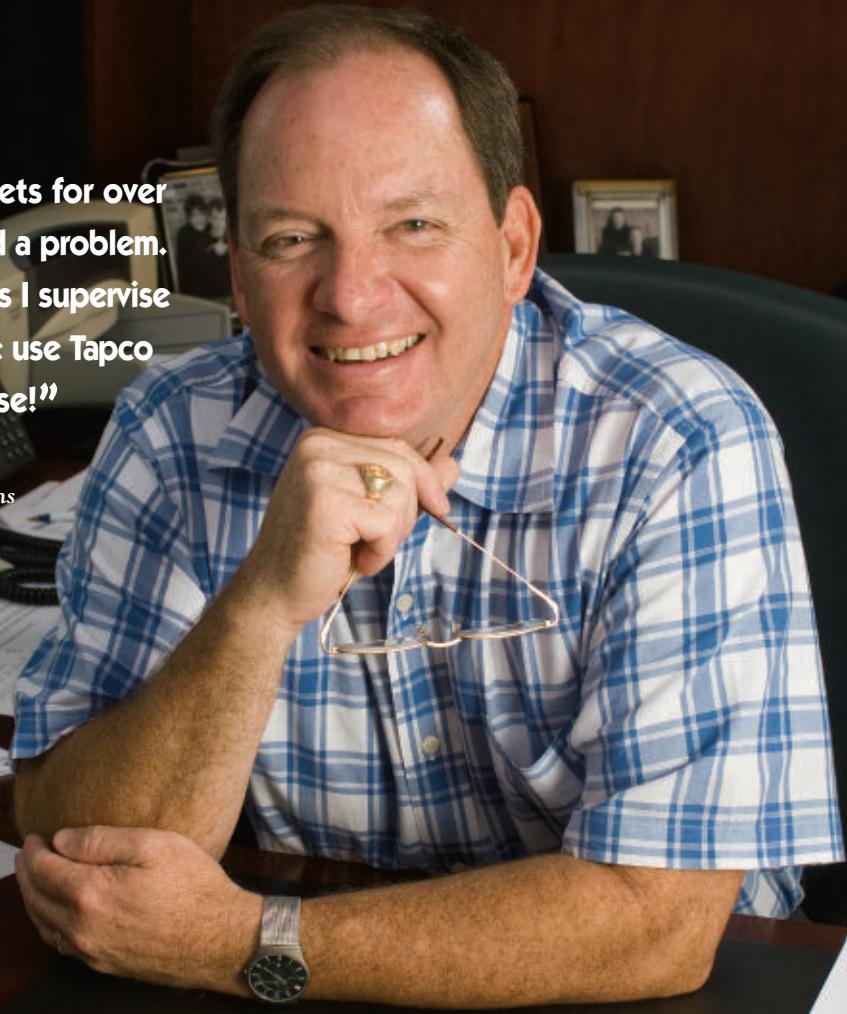
But the importance for petfood companies is that consumers, including pet owners, have been demanding more oversight and attention to this issue, and I believe they will react well to any petfood manufacturer who demonstrates it gets the intent of food safety measures.

If you can show, as transparently as possible, how your ingredient selection, sourcing, testing and other procedures help ensure the safety, quality and health of your products, you should benefit in the marketplace, no matter what type of legislation is in effect. ●

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

- ▶ Group Depré, Belgium, has acquired the petfood division of Trouw Nutrition Belgium with the aim of increasing its market share.
- ▶ BVPI, a researcher and manufacturer of animal-health nutrition products, has launched new site ProbioticSmart.com.
- ▶ Lortscher Agri Service Inc. has appointed Lane Lott as business development manager of its animal nutrition division.

Virtual Petfood Forum: the latest in nutritional information

The all-new, first-ever Virtual Petfood Forum: Target on Nutrition is a live educational event held entirely on the Internet. Scheduled for October 28, it features the industry's leading experts presenting information on companion animal nutrition, then participating in live question-and-answer sessions with attendees.

Speakers and topics include:

- ▶ Exotic ingredients in petfoods—Greg Aldrich, PhD;
- ▶ Dietary components in the treatment of canine osteoarthritis—Anton Beynen, PhD, head of R&D for Vobra Special Petfoods in the Netherlands and professor of animal nutrition, Rajamangala University of Technology, Thailand;
- ▶ Communicating with pet owners about petfoods and unconventional diets—Kathryn E. Michel, DVM, MS, DACVN, University of Pennsylvania School of Veterinary Medicine;
- ▶ The science behind grain-free and raw diets for cats—Brittany Vester Boler, PhD, University of Illinois;
- ▶ When more petfood doesn't equal success—Sean Delaney, DVM, MS, DACVN, Natura Pet Products Inc.

Virtual Petfood Forum also allows you to interact live with your industry peers and with leading solution providers and suppliers to the global petfood manufacturing industry. Registration is free; find out more and register at www.wattevents.com. (If you can't participate live on October 28, you can still view the archive for 90 days afterward as long as you're registered.)



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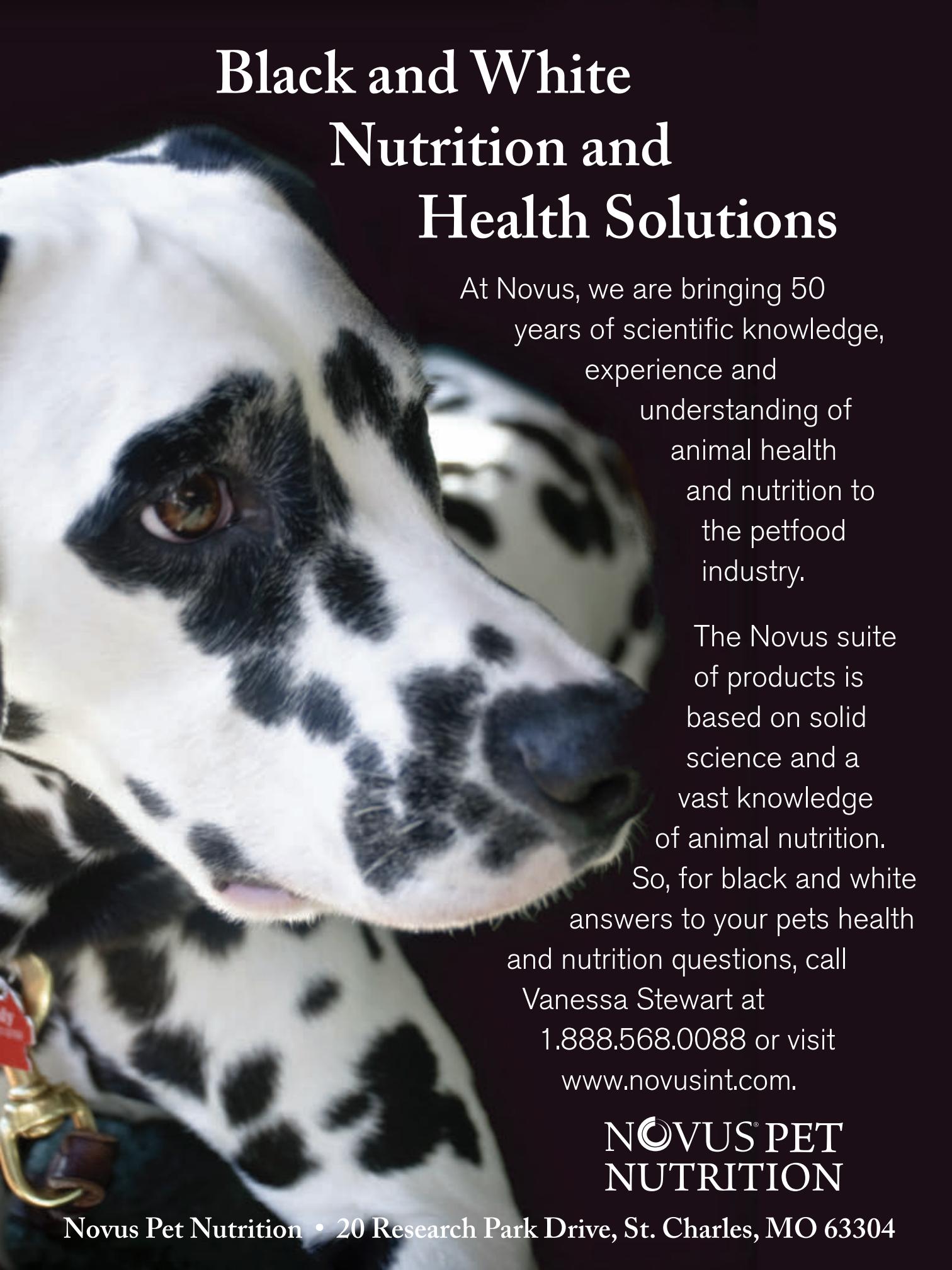
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Nestlé sales show consumer willingness to spend on pets

Nestlé SA reported a reduction in first half profit and revenue as people cut back on purchases of commodities such as bottled water, prepared meals and dairy products, *The Wall Street Journal* reported, but the company's pet care sales grew 9.1% from the year-earlier period.

The company's focus on premium, higher-margin products paid off in the pet care division as people were willing to spend money on their pets, despite the recession. The pet care division's growth beat out all other main Nestlé product segments except powdered and liquid beverages. "Growth in pet care remains resilient," CFO Jim Singh was quoted in the article.

Nestlé's Purina and Friskies brands each increased 6% in sales for the first half of the year, while Dog Chow jumped over 16%—the second fastest growth of any of the company's major products (coffee system Nespresso was first).

WWW.DINNISSEN.NL

Mutt Madness contest for animal organizations

Talk-show host, celebrity cook and face of the Nutrish line of dog food, Rachael Ray, has announced a Mutt Madness Award Program, which began August 6 and aims to disburse more than US\$200,000 as proceeds to nonprofit animal organizations.

The last date for filling out the online entry forms (www.rachaelray.com/pets/muttmadness/index.php) is September

20, 2009. Only organizations that are registered 501(c)(3) charities and employ no-kill practices are eligible.

The top 64 organizations will be selected to face-off in a March Madness style-competition. All finalists will receive US\$1,000 and a chance to win more money. The winner is expected to be announced in early December.

PetfoodForum 2010

Last chance for Petfood Forum 2010 call for papers

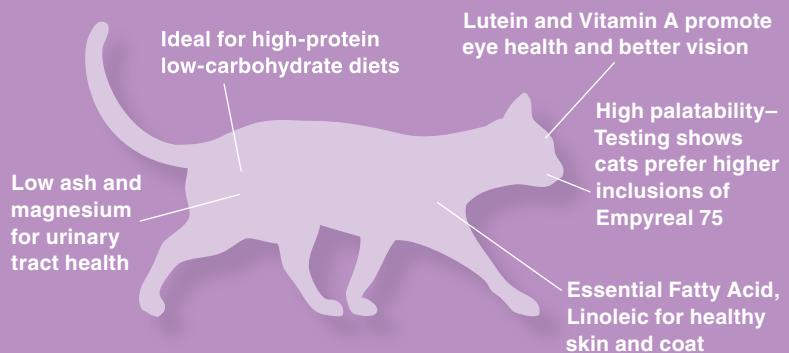
The Petfood Forum 2010 organizing committee invites the submission of abstracts for noncommercial oral and poster presentations on the following topics:

- ▶ Nutrition and ingredients;
- ▶ Packaging;
- ▶ Safety and regulatory issues;
- ▶ Processing and production subjects;
- ▶ Market data, trends and predictions;
- ▶ Company profiles and case studies; and
- ▶ New products.

Petfood Forum 2010 is scheduled for April 12-14, 2010, at the Hyatt Regency O'Hare in Rosemont, Illinois, USA. Abstracts are due September 15, 2009. For more information on what and how to submit, as well as oral presentation requirements, visit www.petfoodindustry.com/petfoodforum2010abstracts.aspx.

You can also still submit abstracts for Petfood Forum Asia, scheduled for March 3, 2010, in Bangkok, Thailand. Go to www.petfoodindustry.com/petfoodforumasia2010abstracts.com.

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13	14	15	16	17	18	19
20	21	22	23	24	25	26
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SuperZoo West, September 23-25, 2009, Las Vegas, Nevada, USA, Contact: World Wide Pet Industry Association, info@wwpia.com, www.wwpia.org.

AFIA Regulatory Training Short Course: What's What in Feed, Ingredient & Pet Food Regulations, September 28-29, 2009, Arlington, Virginia, USA, akeller@afia.org, www.afia.org.

PetEx 2009, September 6-7, 2009, Shelbourne Hall, RDS, Dublin, Ireland, Contact: Pet Expo Limited, Tel: +00353.1.4951645, marie@petex.ie, www.petex.ie.

Woofminster 2009, September 19, 2009, Scarborough, Maine, USA, Contact: Planet Dog Foundation, Kristen@planetdog.com, www.planetdogfoundation.org/events.aspx.

Glee Pet Index, September 20-22, 2009, NEC, Birmingham, UK, glee2009@emap.com, www.gleebirmingham.com.



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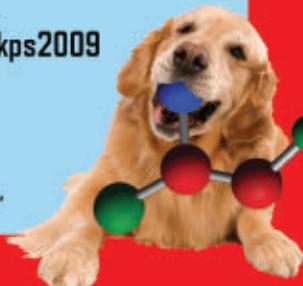
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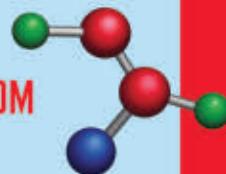
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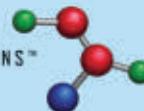
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PETFOOD INDUSTRY

G L O B A L

Pedigree re-launched in India. Pedigree, a dog food brand from Mars Inc., has been re-launched in India along with a new range of snacks and treats.

Nitin Kulkarni, director of corporate affairs, Mars International India, said the Indian market offers tremendous opportunity for the company.

The US-based Mars Inc. is looking to increase its retail presence in India with hopes of achieving a retail sales value of \$US1 billion this year from the product.

Australia withdraws irradiation option for petfood treatment.

Australia will not allow importers to irradiate imported cat food to reduce microbial hazards. The decision follows reports of possible links between irradiated food and neurological damage.

Though studies have found food irradiation safe, in November 2008 University of Sydney's Dr. Georgina Child reportedly found an association between irradiated cat food and neurological damage in cats, according to Sydney Morning Herald.

In June, Australian Quarantine and Inspection Service stated it would withdraw the irradiation option for imported cat food but not imported dog food.



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Canada imposes new rules on petfood industry

The Canadian government has imposed new rules to prevent a rerun of the 2007 petfood recalls.

The new rules require import permits for all petfood and indi-

vidual ingredients entering the country. Also, petfood containing ingredients from US cattle requires



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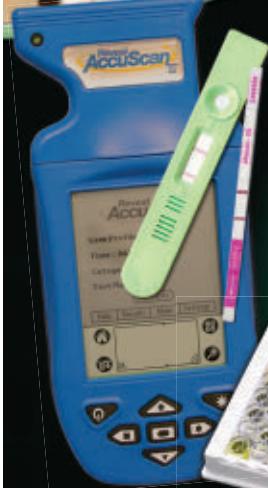
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FDA inspection. The consequences of violations of any law now include plant closings or criminal prosecution.

CFIA inspectors have also been given the authority to run surprise checks at any Canadian petfood manufacturing unit. They also now need to inspect, at least once every year, plants that manufacture petfood items for export.

Castor & Pollux shelter donations pass half million

Castor & Pollux Pet Works donated more than a half million meals to animal shelters in 2008, catchchannel.com reported. The donations were made through the company's partnership with Freekibble.com.

The Clackamas, Oregon, USA-based manufacturer of natural petfood and treats has reportedly donated more than 538,000 meals for dogs and cats to date.

Freekibble.com was founded in 2008 to provide food to dogs and cats in shelters, pledging to raise 10 pieces of kibble for affiliated shelters from Oregon to Florida, USA, for every trivia question answered online.

Castor & Pollux donated its dog and cat foods to about 10 of the 14 Freekibble.com-affiliated shelters.

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Kibble Korner offers new petfood pantry

Kibble Korner Pet Food Pantry in Rockford, Illinois, USA, is helping struggling families get food for their pets during these hard economic

times. The families can visit the pantry once a month.

Statistics released by Winnebago County, Illinois, show the number of

cats and dogs given up through July this year are up 13% and 14% respectively, compared with a year ago.

The pantry has two locations and is accepting donations at both.



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Nutro announces stricter checks



Nutro has reintroduced its dry cat food after the voluntary recall in May 2009. The company said its food-safety program now has stricter quality checks for suppliers and extensive testing of inbound raw materials and finished products. It has also reportedly enhanced the ingredient quality.

In May, the company discovered that two premixes from one of its US-based suppliers contained excessive levels of potassium and zinc.

Nutro announced in August that all its cat food brands were available at petfood retailers.



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« Semi-moist dog treats

Natural Balance Pet Foods offers Tillman's Training Tips, a line of semi-moist dog treats. The bite-sized treats are available in four varieties: Chicken & Vegetable, Lamb & Vegetable, Beef & Vegetable and Turkey & Vegetable. An appropriate snack for puppies and adult dogs, the treats contain no corn, soy, wheat, artificial flavors or preservatives, according to the company. www.naturalbalanceinc.com

Frozen dessert for dogs »

Nature's Variety has a line of all-natural ice cream dog treats called SweetSpots. The treats are 98% lactose-free, fortified with whey protein and enriched with live active yogurt cultures to aid in digestive health, according to the company. www.naturesvariety.com



« Grain-free lamb formula

FirstMate Australian Lamb diet is grain free. Blueberries, raspberries and cranberries also are included in the dog food for palatability and the immune system, the company says. The diet has 24% protein and 13% fat, and can be fed to dogs of all ages. www.firstmate.com

Dog, cat dental treats »

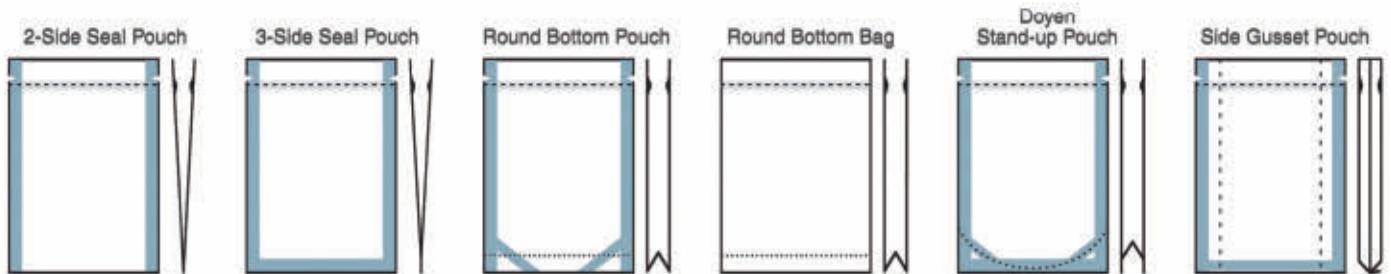
Hartz Mountain Corp. offers Hartz Crunch 'n Clean Biscuits for dogs and Crunch 'n Clean Treats for cats. The DentaShield formula, featuring the ingredient sodium hexametaphosphate, is designed to combat tartar build-up. www.hartz.com



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Part of the Tuffy's team (left to right): Gary Ebeling, Don Foltz (front), Marie Malcolm, Jim Farrell, Randy Ebeling (middle row), Lance Schultz, Dave Doll, Jim Hendrickson, Bob Perszyk, Tim Lachowitz (back).

All in the family

Business basics

Headquarters/facility:

Perham, Minnesota, USA

Officers: Ken Nelson, president; Charlie Nelson, vice president of sales; Jim Farrell, national sales manager

Sales: 30%+ annual growth

Brands: Nutrisource, Natural Planet Organics, Pure Vita, Tuffy's, Tuffy's Gold

Distribution: Independent pet stores in North America, plus the Pacific Rim, Australia and a few Middle Eastern countries

Employees: 150

Websites:

www.nutrisourcedogfood.com,
www.naturalplanetorganics.com,
www.tuffyspetfoods.com

Tuffy's Pet Foods succeeds by working family to family and doing the small things right

BY DEBBIE PHILLIPS-DONALDSON

Tuffy's, based in Perham, Minnesota, USA, is indeed unique, and not just because of its ownership. Its history and collaboration with other divisions of its parent company, KLN Enterprises, brings a distinctive knowledge to petfood manufacturing.

All this adds up to growth of over 30% a year. While that may not be unique in the dynamic petfood industry, it does make the case for—as Tuffy's national sales manager, Jim Farrell, puts

it—striving to “be who we are and keep within our niche.”

The right thing to do

Part of who the company is includes 40-plus years of manufacturing its own petfood, beginning in 1964 when founder Darrell “Tuffy” Nelson and his son, Ken, developed the Tuffy's line of dog and cat food as an offshoot of its livestock and poultry feed business begun in 1947. Petfood sales soon took

“In today's business world, there are fewer and fewer family-owned-and-operated manufacturing businesses, especially ones as unique as ours,” says Charlie Nelson, vice president of sales and part of the family that owns Tuffy's Pet Food.

off, leading the company to discontinue manufacturing feed.

In 1971, Tuffy sold his company to Heinz Pet Products (Star-Kist Foods). The plant in Perham still made Tuffy's Pet Foods in addition to 9-Lives Cat Food. In 1996, Windy Hill Pet Food purchased the plant and Tuffy's label; two years later, Windy Hill merged with Doane Pet Care.

Then in 2001, the Nelson family repurchased the facility and label. Charlie Nelson explains why: "It was the very first company our family got involved in, so it was near and dear to our hearts. Just as important, the current owners were planning to close the facility altogether. Of our town of about 2,200 people, roughly 140 people were employed by that business, a lot of husbands and wives, a lot of people whom we go back with." Buying back the business, he says, "felt like the right thing to do."

At that point Nelson also became involved in his family's company, which, in the years it was not making petfood, had created two other businesses: human snacks and licorice. "We were able to bring some of that expertise on the manufacturing side of human products back to the manufacturing side of petfood, so it was a very nice fit for us," he says. "All three companies have been able to share knowledge and experience. That really separates us, we believe, from others in the petfood industry. To own our facility, be hands-on and have that expertise is key for us."

All available knowledge

Since re-entering the petfood arena, the company has launched three new brands:

- ▶ Nutrisource, a superpremium line on the market since 2003;
- ▶ Natural Planet Organics, a certified organic line launched in 2007; and
- ▶ Pure Vita, a single-source protein formula on shelves since mid-2008.

"When the family took over again in 2001, work started immediately on a superpremium line of products," says Chuck Orvik, product specialist for Nutrisource. "That work went on to make Nutrisource a broad set of products

that used all the nutritional knowledge, all the ingredient knowledge available in 2001 and 2002—it took about two years to develop. That became our main product line."

Not only is the Natural Planet Organics line certified organic by Oregon Tilth, but the Tuffy's plant is also inspected and approved by the Amer-

Proceeds from sales of Natural Planet Organics, a certified organic line, are donated to support a group called Angel of Hope.



The newest brand from Tuffy's, Pure Vita, features a single source of protein such as duck, salmon or chicken.

Nutrisource was the first new brand Tuffy's launched after the Nelson family repurchased the business in 2001; it now includes a full line of cat and dog food products.

ican Institute of Baking. "We're very proud of the product because it's certified, and the feedback we get from customers is that pets really like it," Orvik says. "That hasn't always been true with organic products."

Recently Tuffy's added cat food to the Natural Planet Organics brand. Another point of pride is that the company donates a portion of proceeds from sales of the line to Angel of Hope, an organization of parents who have had a child die.

Focus on independents

The newest product line, Pure Vita, is designed for pets with allergies. "Using a single-source protein like the duck formula, or the separate salmon formula, allows us to target customers

who are looking for a unique protein source or are feeding for a possible allergy," Nelson says. "We also tout high levels of antioxidants."

Tuffy's purchases many of its ingredients from local growers and uses extensive research, state-of-the-art equipment and quality testing to ensure consistent, high-quality products.

Besides some international distribution, the products are sold throughout North America, but only in independent pet stores. "Our focus is to grow our labels on a national basis through the

specialty pet chain," Nelson says. "While we want to be able to sell our products in all states, the channel we do that through is very important to us. We really enjoy working family to family with our business."

Family to family

The family emphasis is not just a warm and fuzzy sentiment; it's part of the company's business strategy as a key



Online extra!

Read the full interview with the Tuffy's team at www.petfoodindustry.com/Tuffys.aspx.

differentiator from competitors. “We like to do business with family-owned distributors and retailers, and that’s how we set ourselves apart,” says Farrell. “That’s what we like to be known for: as somebody big enough to have a high-quality petfood but also able to take care of independent retailers’ needs, ensure their profitability and keep that relationship.”

This strategy permeates the company’s supply chain. “What distinguishes the network of suppliers that provides our ingredients is that they by and large have been suppliers for many, many years,” Orvik says. “We’ve done business with the same suppliers who know us, who know what we expect of them and we’ve developed partnership relationships with many of them.”

“Which kinds of lends itself to why we weren’t involved in the 2007 recalls,” Farrell adds. “We have a large marketing push with our brands that we know our sources.”

Nelson emphasizes the company’s commitment to the strategy: “We have absolutely no plans of not being a family-owned company, and that is a big question we get asked. With so much consolidation going on in this industry, people want to know and like to know and deserve to know that we’re going to be around, we’re going to continue to provide high-quality, ethical products, we’re going to continue to bring new items to the market that our retailers are asking us for.”

Back hunting again

The family touch extends even to consumers. “They contact us all the time with questions and compliments about how great our products are,” says

Paula Sucher, sales coordinator. “We’ve heard testimonials about old and lame dogs that are now back hunting again after eating our food.

“We have a personalized customer service desk here, too,” she continues. “If someone has a question, they can pick up the phone and talk directly to a person. We don’t have any automated phones. People tell us all the time how nice it is to actually talk to a human being right away with a question or concern.”

Nelson chimes in: “If there are questions on ingredients, they’re answered directly by us. That’s why we’re growing and why I think we have nice relationships; it’s doing these small things that we don’t have any plans of getting away from. We remind each other of the grassroots approach to growing this business.” If they stay on that path, he says, “We can continue to grow nicely, focus on our segment of the industry and keep moving forward.” ●

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Riding out the recession

The tide continues to turn in favor of the petfood market thanks to natural, wellness and new products making waves

BY JESSICA TAYLOR

According to the latest data from Mintel, sales of petfood and pet care supplies continue to rise in spite of the recession. Sales will hit US\$27.5 billion in 2009, an increase of 2.9% over 2008. Over the past five years sales have increased 19%, or 3% after adjusting for inflation, and are expected to grow at just less than 3% per annum through 2014, predicts Mintel. Research conducted by Del Monte Foods, reported

in *Ad Age* (May 25, 2009), found that consumers were more likely to sacrifice on their own food before cutting back on petfood.

▶ Dog food dollar sales continue to rise slowly as dog owners seek out what they perceive as superior nutrition and quality ingredients. Mintel estimates an increase of 3% in 2009 to US\$9.8 billion. Over the past five years, dog food sales have increased 19%.

Source: www.npwm.com

Despite the struggling economy, sales of petfood have generally held strong, as most pet owners remain committed to feeding and caring for their pets.

- ▶ Sales of cat food have risen slowly but steadily over the past four years. Segment sales will reach US\$6.6 billion in 2009, an increase of 2.4%. Over the last five years, sales have increased 12%.
- ▶ Sales of food for pets other than cats and dogs has grown less consistently and more slowly overall. Mintel estimates that sales will increase 1.3% in 2009. Over the last five years sales have increased 5%.

Figure 1. Alternative petfood segment performance

Relative to total US petfood market: 2003-2007 (percent, growth rate)

Market classification	Share of total petfood sales	Average annual growth rate
Total	100%	5.3%
Natural†	6.0	24.6
Frozen/raw	.9	35.0
Organic	.5	48.1
Refrigerated	< 0.1**	N/A

* Including organic. ** More than 1,000%. Source: *Packaged Facts*

Emphasizing value

Despite the struggling economy, sales of petfood have generally held strong, as most pet owners remain committed to feeding and caring for their pets—often looked at as family members. The



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continued slow but steady growth of category dollar sales has been influenced by a variety of factors, according to data from Mintel and Packaged Facts:

- ▶ **Specialization.** Pet owners remain willing to pay a premium for specialized petfoods that promise a variety of benefits for pets and, increasingly, appeal to the broader food and nutrition attitudes of the owner.
- ▶ **Inflation.** The food commodity inflation that has pushed up prices all over the supermarket in recent years has also impacted the petfood aisle.
- ▶ **Recall after effects.** The recall of petfoods in the spring of 2007 did little to slow the growth of the industry and, if anything, has motivated more pet owners to seek out what they perceive to be safer alternatives, sometimes at a higher price.

While some pet owners have gravitated to new premium brands promising superior nutrition for their animals, others have been forced to, or chosen to, economize. According to Mintel's recent consumer research, a quarter of pet owners claim to have switched to less expensive petfood due to the economy. A chief beneficiary of this down-trading has been retailers' private labels.

Dog and cat food grows on nature and science

Dog food sales have experienced solid growth in the past two years, as dog owners have displayed increased consciousness of

Alternative petfood share of sales

The strong showing for petfood overall in 2007 and 2008 reflects the switch to higher-priced products including natural and organic varieties, according to Packaged Facts' January 2009 report, *Pet Food in the US*. Natural petfoods account for approximately 6% of total petfood sales, Packaged Facts estimates, with frozen/raw foods at approximately 1% and organic foods at about 0.5%.

Despite their small size, all these "alternative" petfood types are growing significantly faster than the 5 to 6% annual rate of sales increase in the petfood market as a whole. Of the various types of alternative petfoods, organics enjoyed the fastest gains from 2003 to 2007, posting a 48% compound annual growth rate.

According to Packaged Facts' February 2009 pet owner poll, 62% of dog owners and 56% of cat owners purchased natural/organic pet products in the preceding three months, with treats leading the way among dog owners (49%) and food topping the list among cat owners (40%). When asked about organic petfoods specifically, 16% of dog owners and 15% of cat owners reported purchases within the same period.

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ingredients and a greater interest in foods that promise a natural, healthy balance. Brands such as Goodlife Recipe from Mars Inc. and Beneful from Purina have gained share. In addition, brands that cite scientific credentials and research, such as Iams and Purina ONE, have remained strong competitors.

Dollar sales of cat food have continued to rise slowly over the past four years as manufacturers of mainstream brands have offered specialized meals for finicky cats. In many cases these premium priced foods have also featured natural and specific ingredients such as wild salmon and garden greens.

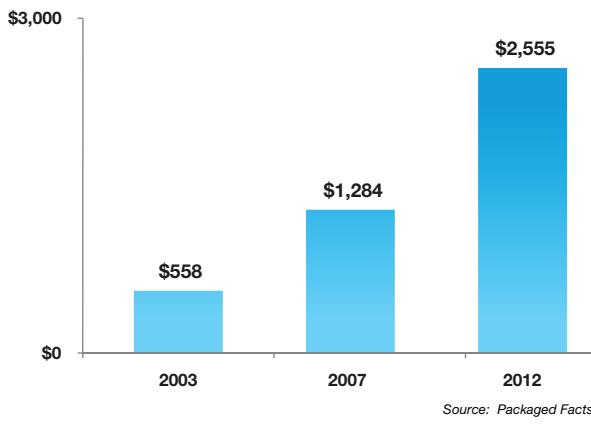
The next niche

Beyond the mainstream dog and cat food market, ample opportunities exist for smaller, more narrowly focused competitors in pet specialty stores, which offer a broader selection of superpremium brands with highly specialized varieties that target pet lifestages, lifestyles, health issues, ingredient preferences, even specific breeds, says Mintel. Many retail channels are starting to compete as well. Supermarkets, mass merchants and pet specialty stores account for most sales, but other channels registering sales include warehouse clubs, dollar stores, natural food stores, convenience stores, drug stores, farm supply stores, home centers and several others.

According to Mintel's Global New Products Database, petfood new product activity has been heaviest over the last few years in the

Figure 2. US sales of natural and organic pet products

Data from 2003, 2007 and predicted growth for 2012 (in millions of US dollars)



area of dog snacks and treats, which have accounted for roughly half of all products launched. New snacks have come from both leading petfood companies and literally hundreds of other competitors, many of them concentrating on all-natural products. Most new pet snacks and treats also embody the emphasis on highly specific pet health and wellness benefits that have overtaken the

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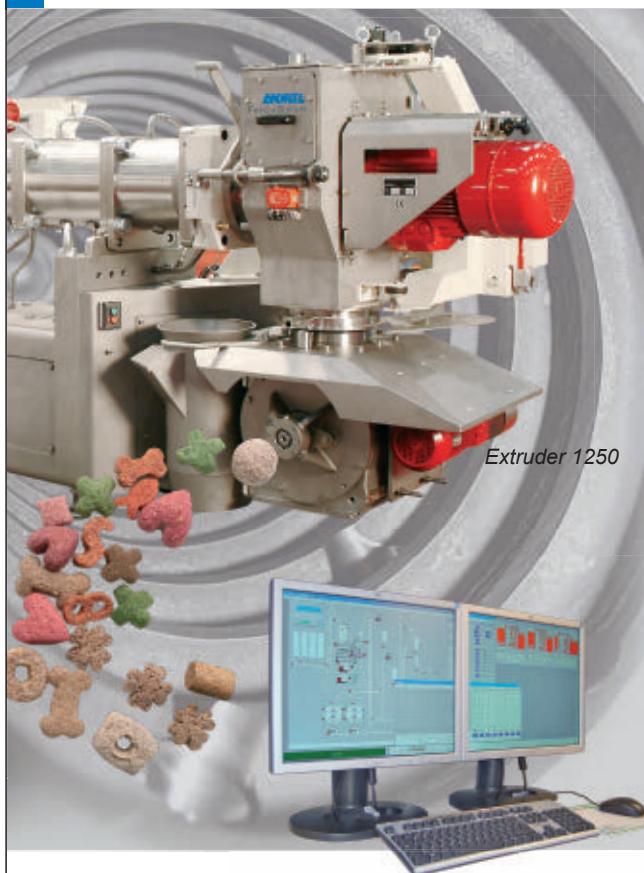


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Get a more in-depth look on what the future of the petfood market holds from Mintel and Packaged Facts at www.petfoodindustry.com/marketwaves.aspx.

entire petfood industry. Functional food claims include such benefits as dental care, immune system support, digestive health, skin health and joint health. Natural ingredients are common, as are antioxidants, omega-3 fatty acids, fiber and vitamins.

The highest growth pet market segments—natural and organic—overlap with retailer trends. Petco recently announced an agreement with TerraCycle to test a petfood bag recycling program in Petco locations. The natural/organic trend dovetails with a new consumer sense of temperance, value and social responsibility. Smart manufacturers will position pets as a primary connection to the earth and all things natural with their ingredients, marketing and packaging. ●

Figure 3. Top 20 marketing claims

Claims by number of new pet product reports, 2008

Marketing claims	Number of reports
Natural	265
High vitamins	238
Upscale	224
High minerals	166
No preservatives	158
High protein	142
No artificial color	141
No artificial flavor	108
High omega-3	96
Organic	85
Fresh	79
High antioxidants	77
No wheat	76
Real	72
High omega-6	70
Single serving	51
No animal	44
No fillers	44
No gluten	44
Low fat	40

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Tasty and healthy

Many of today's palatants also deliver nutritional or functional benefits to petfood

BY DEBBIE PHILLIPS-DONALDSON

Responding to consumer requirements, more and more petfood ingredients ensure good taste along with nutritional or functional value.



Online extra!

For more about AFB's probiotic-powered palatant, visit www.petfoodindustry.com/ProbioticsfromAFB.aspx.

When it comes to what they put in their pets' bowls, today's consumers demand the best quality and nutrition. That means petfood manufacturers and suppliers must develop and select every ingredient and component of a formulation for maximum effect.

Perhaps in no category does this ring more true than palatability. "Industry and customers have required that we take a completely different approach to palatability," said Jennifer Radosevich, PhD, director of R&D and regulatory affairs for the petfood division of Kemin Industries Inc., in a 2008 presentation at the Simposio sobre Nutricao de animais de estimacao in Brazil. "They want to know our products not only taste good but also have nutritional or functional value."

Probiotic power

As more and more consumers seek to provide the same nutritional benefits to their pets that they enjoy, they're also looking for ways to ensure consumption of healthy petfoods. The availability of good-tasting foods containing probiotics is leading to rapid growth in this category.

Unfortunately, says AFB International (www.afbinternational.com), most probiotic species do not survive well in dry petfoods due to the low water activity. Few live strains of probiotics survive the stomach acids or bile acids to actually reach the gut in a viable state. Through a partnership with Ganeden Biotech Inc., AFB has recently created a new palatant to address this problem.

This new product contains GanedenBC³⁰, live spores of a patented strain of *Bacillus coagulans*. The probiotic was reviewed by the US Food and Drug Administration's Center for Veterinary Medicine and found to present no concerns when used in direct-fed microbial products, according to AFB.

GanedenBC³⁰ is currently available in a variety of human food products, providing a link between benefits for owners and pets. The spore-forming nature of this strain allows petfood marketers to use the probiotics in their existing manufacturing process and apply either liquid or dry palatants to the surface without worry about spore survival, AFB says. Key benefits of this approach include more uniform distribution of the probiotics and survival throughout the shelf life of the petfood product (Figure 1, p. 40). This brings active cultures to pets daily through their normal diets, eliminating issues with pets not accepting a supplement.



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The spores' germination is triggered by the transition through the pH changes between the stomach and the intestinal tract. The pet's own system becomes the means to activate the probiotics at the appropriate time. According to AFB, growth of the probiotics in the intestinal tract promotes:

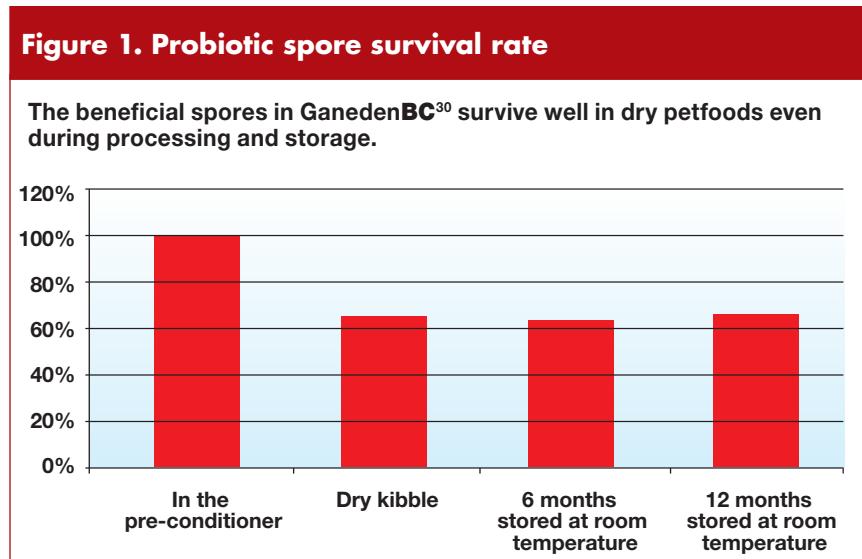
- Improved digestive health through the production of lactic acid;
- Improved breakdown of nutrients for better absorption; and
- Displacement of undesirable bacteria in the gut.

Feeding studies conducted by AFB have shown growth of the probiotics in the gut with a 780% increase in fecal spore counts after only seven days on the feed. Currently the product is available in the US and Canada.

Immune response boost

Kemin (www.kemin.com) employs a total palatability approach to fulfill consumer requirements for petfoods that combine health benefits with taste. This approach, Radosevich says, "generates thousands of compounds to add/detract to palatability but also can affect the health of the animal." Kemin demonstrated the effects by adding a functional ingredient to a palatant and studying the response through nutrigenomics.

Nutrigenomics is the study of how



particular nutrients affect the expression of genes in the DNA of a living animal. Kemin looked at linking diet with gene expression via a trace mineral nutrigenomics experiment, a non-invasive study with Beagles examining the effects on gene expression in white blood cells after supplementation with one of the company's products, KemTrace Zinc.

The immune response effects included:

- Increased toll-like receptor expression—these proteins on the surface of immune cells are critical in recognizing substances foreign to the body

and form the first line of defense against bacterial invasion;

- Increased interferon-g receptor expression—interferon-g is a major cytokine (signaling compound) secreted by a variety of cells that is crucial to controlling infections and tumor growth;
- Upregulated genes—zinc supplementation upregulated genes encoding structural proteins required for wound repair.

Applying technology

Adding dual functionality to palatants is driven by growing petfood market

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sophistication (for example, health value) and the need for manufacturers to find cost-effective formulations, according to SPF (www.spf-diana.com). Because palatants are commonly used topically and are not subject to drastic process conditions, they are ideal vectors for sensitive compounds such as nutraceuticals or heat

sensitive chemicals, SPF says.

Also, technologies used to produce palatants can be applied to create other compounds with functionality besides just palatability. SPF is including this capability at an early phase of product development and has developed innovative technologies to add functionalities

to the palatant. SPF offers specific solutions answering precisely the needs of this emerging segment—for example, a palatant for hypoallergenic diets. ●



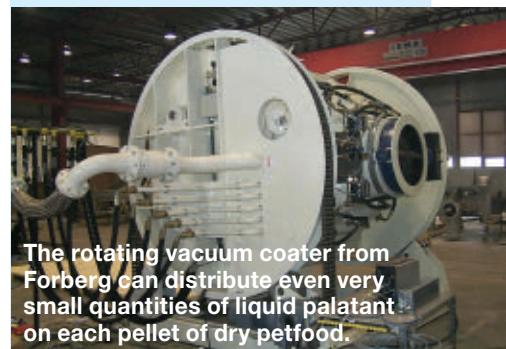
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The rotating vacuum coater from Forberg can distribute even very small quantities of liquid palatant on each pellet of dry petfood.

Palatability and production

Besides a careful selection of ingredients, ensuring palatability involves the right processing technique, especially for liquid additives to dry petfood products. The rotating vacuum coater (RVC) from Forberg International AS (www.forberg.no) was specifically developed to improve the intrusion of liquids into porous extruded pellets.

The RVC allows for multiple layer coating. Other features, according to Forberg, include:

- Loading and unloading the machine through the same valve minimizes risk of leakage;
- Smooth process chamber with accurately adapted rotors ensures very low wear and breaking of the pellets during processing;
- Machine is easy to change between formulas without risking cross contamination.

The RVC can distribute even very small quantities of liquid additive onto each pellet perfectly and directly, Forberg says, because of its ability to fluidize the product and its high internal transport capacity.



Online extra!

For more information about applying liquid palatants, see www.petfoodindustry.com/ForbergRVC.aspx.

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To learn more, turn the page.



The age of convenience

Single-serve, pouch, resealable, easy-open and easy-carry are buzzwords pet owners are looking for in their petfood packaging

BY JESSICA TAYLOR

The basic functions of effective petfood packaging are containment of the product, protection for the product and consumer, promotion and communication. The most *important* function of your packaging, however, may very well be how convenient it is for pet owners. “The primary focus in petfood packaging today is on convenience,” said Michael Mullen, spokesperson for Heinz North America, maker and marketer of Heinz Pet Snacks and Heinz Pet Foods, in *Food & Drug Packaging*. “An important point to remember, however, is that the

consumer is not the one who consumes the actual product, but the one who carries it home and dispenses it.”

Packaging pioneers

With its easy-open convenience and ability to maintain product quality, the retort pouch penetrated the petfood market as an alternative to the metal can with the May 1999 debut of Kalkan’s Whiskas cat food in a pouch. The company showed its commitment to this package by also using it for the introduction of its Pedigree Little Champions dog food in May 2001.

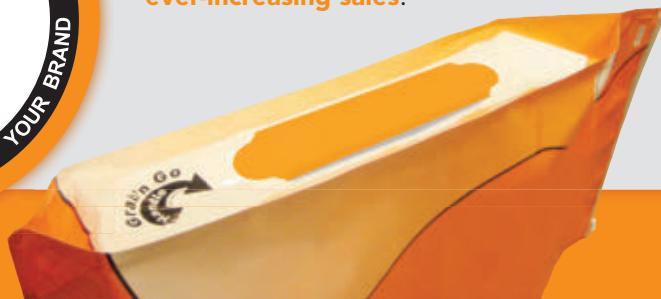
Crown Food Europe received the Gold Award at the 2008 Can of the Year Awards in the Ends, Caps and Closures category for its Easylift easy-open end technology. Launched by Nestlé Purina Petcare Europe on its cat and dog food products, the end represented a new standard in convenience packaging. Improved finger access makes it quicker and easier for consumers to open canned foods without the need to use extra tooling, according to Crown. The technology allows consumers with limited mobility, such as seniors, children and the physically impaired, to

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access food products without using a can opener or other tools.

The greatest of ease

The Slide-Rite closure system, developed by Pactiv, is a smooth, reliable, easy-to-use closure system ensuring quick access to the contents. The product stays

fresh inside its original, branded bag, and the slider's size is ideal for young as well as senior pet owners and for people with reduced dexterity, according to the company. The new 'S'-Slider system, combined with enhanced end stops, offers extra reliability thanks to improved retention of the slider.



The Easy-Lift technology allows consumers with limited mobility, such as seniors, children and the physically impaired, to access food products without using a can opener or other tools.

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Zip it up

Exopack's packaging line Enduro is a line of consumer products in preformed bags and stand-up pouches formed from a variety of substrate and package formats. This allows them to deliver convenience to the consumer, as well as the shelf appeal and barrier requirements of a premium petfood, according to Exopack. Enduro-SOS, for example, can feature a tin-tie reclosure system for the convenience-driven consumer, while the Enduro-SUP bags are available with top-slider or top press-to-close zippers.

Slider technology allows consumers easy opening of the package without a knife or scissors and enables hands to easily reclose the package while ensuring clean and safe storage. If consumers want an added level of tamper evidence, a hooded slider from Peel Plastics can provide the added peace of mind they require. By adding a very visible tear away seal above the zipper as well as a seal in the slider itself, consumers can be sure that the product has not been tampered with, according to Peel.

If you are looking for a way to ease the transportation or dispensing of your

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Take a look at Peel Plastics' Grab 'n' Go handle in action at www.peelplastics.com/PeelGrabNGo.html.

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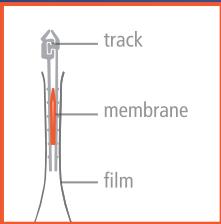
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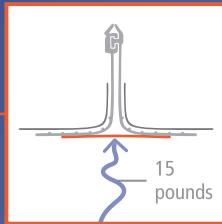
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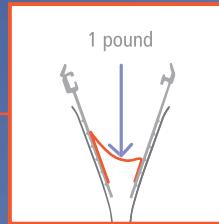
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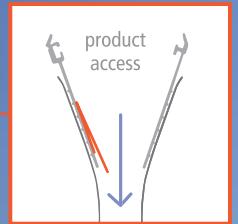
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EZ open membrane resists high forces from the inside



But very easy to open for the consumer

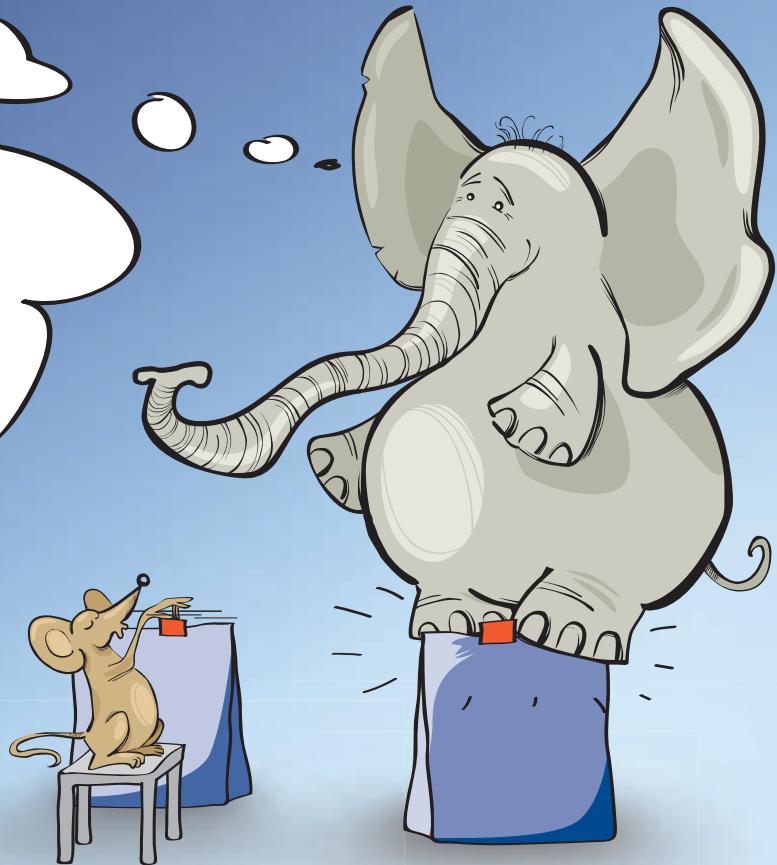


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MAKES SENSE!

petfood products, Peel also offers a wide range of handle formats—like the Grab ‘n’ Go side gusset handle launched in April 2009—that can be incorporated into many of their package styles.

Online Extra!

Check out a behind-the-scenes video at how specialty flexible packaging manufacturer Glenroy Inc. keeps up with trends at www.petfoodindustry.com/GlenroyVideo.aspx.

The shape of things

Peel’s positions its SlideCube package as a preferred alternative to conventional package formats, including multi-wall paper bags, folding cartons and gable top containers. The SlideCube allows consumers to have

easy access to the product and a simple, convenient storage method. The positioning of the slider at the top of the bag is preferred by consumers over front-mounted zippers, according to Peel, because it allows for easier scooping as the opening of the pouch is larger and permits the consumer to see the product when pouring. Check out a 3-D eDrawing of the SlideCube packaging at www.peelplastics.com/images/e-drawings/slidescube.html.

What’s ahead?

Petfood manufacturers absolutely need to cater to the female buyer when selecting packaging since women are the buyers of pet products in 8 out of 10 US households, according to Weatherchem, a research firm. If packaging does not meet their requirements, their buying decision is clearly influenced. For instance, if the product’s shape is not ergonomic or if a package is diffi-

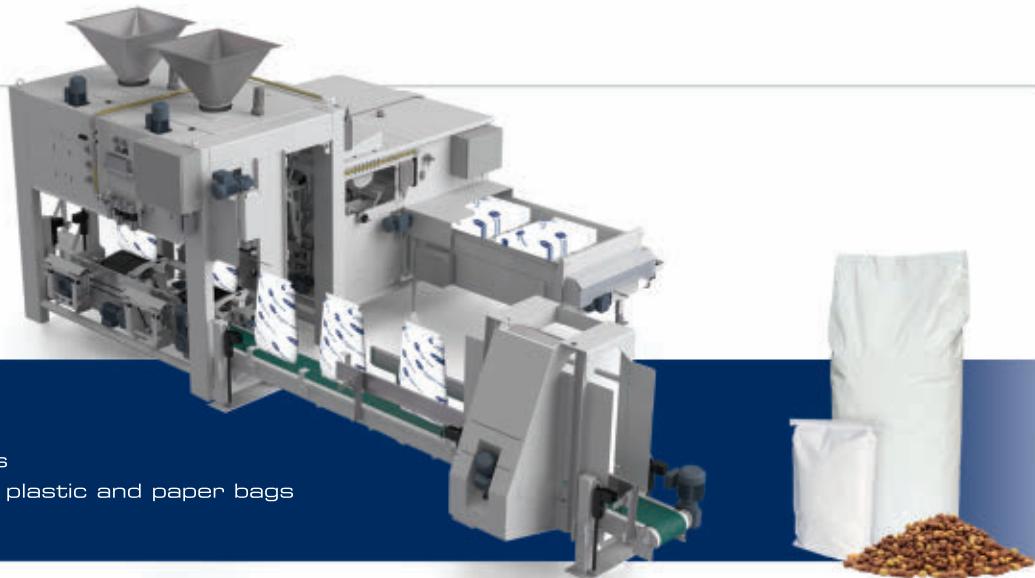
Watch it on the web
Get a peek at Crown’s award-winning Easy-Lift packaging technology at www.crowncork.com/easylift/video/index.html.

cult to lift and carry, it is much more difficult to sell to women.

Packages like Deli-Cat brand cat food are more appealing to the female buyer. The product comes in a large jug container that is easy to store and has a convenient carrying handle to make using the product effortless for the consumer. Peel Plastics’ Grab ‘n’ Go handle represents another innovative solution focused on customer convenience, making large bags of petfood more easy to carry and transport. ●

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Reportable Food Registry and its impact on petfood

In August, during the 100th anniversary meeting of the Association of American Feed Control Officials (AAFCO), held in Washington, DC, USA, a topic of imminent importance to the petfood industry came up for discussion: implementation of the US Food and Drug Administration (FDA) Reportable Food Registry.

The formation of a means for food and feed companies to report incidents of adulteration in a timely manner is a mandate of the FDA Amendments Act (FDAAA) of 2007. This provision was put in place in response to the perceived delays in reporting incidents of contamination, which may have exacerbated their adverse impacts on human and animal health.

Perhaps the most notable event that prompted this new law was

The mandatory system is intended to help FDA quickly track patterns of adulteration.

— David Dzanis



agency's limited inspection resources more effectively.

Required to report

The Reportable Food Registry requires the responsible party to report as soon as practical (but no later than 24 hours) any discovery where there is reasonable probability that the use of, or exposure to, a food or feed will cause adverse health consequences or death to humans

or animals. Failure to comply with this reporting requirement will be a felony.

While the portal for submitting reports is not available for viewing at the time of this writing, an FDA official at the AAFCO meeting described the submission process as "easier than doing your income tax." Instructions will be available on the webpage.

A report must include:

- ▶ The responsible party's Bioterrorism Act registration number;
- ▶ The date the food was determined to be reportable;
- ▶ Description of the food (quantity affected, product codes, names of manufacturers and distributors, etc.); and
- ▶ Extent and nature of the adulteration.

Other requirements

Responsible parties must also report the results of any investigation into the cause of the adulteration and the disposition of the adulterated item. This latter information may be unknown or incomplete at the time of the first submission but, when completed, must be included in an amended report.

the contamination of petfoods with melamine and related compounds earlier in 2007. The mandatory reporting system is intended to help FDA quickly track patterns of adulteration and support efforts to target the

or animals. The responsible party is the person who submits the facility registration under the Bioterrorism Act of 2002. These reports must be submitted through FDA's electronic portal, due to be accessible on www.

Find more online!

Read about FDAAA at www.petfoodindustry.com/0712PETinsight.aspx.

Find a Q&A on the requirements and compliance to the Reportable Food Registry at <http://www.fda.gov/Food/GuidanceComplianceRegulatoryInformation/GuidanceDocuments/FoodSafety/ucm165626.htm>.

Look for the electronic portal for submissions to the registry at <http://www.accessdata.fda.gov/scripts/ReportableFoodRegistry/> starting September 8, or go to www.fda.gov and click on Report a Problem.

FDA may impose other requirements after evaluating the report. This could include additional information as needed for FDA to conduct its investigation and notify the immediate previous source and/or immediate subsequent recipient(s) of the adulterated item, who in turn may also have to file reports. Finally, there are requirements to keep records on all reports for two years.

Exemptions apply

The responsible party will not be required to submit a report if:

- ▶ The adulteration originated with the responsible party; AND
- ▶ The food was in full control of the responsible party at time of detection of the adulteration; AND
- ▶ The cause of adulteration was determined and corrected, or the food was destroyed.

Assumedly, a report also would not be required if the adulteration did not result in a reasonable probability of serious harm. At this time, though, guidance on how this determination is to be made by the responsible party is lacking. The impression given by FDA is, if in doubt, the responsible

Failure to comply with this reporting requirement will be a felony.

party should err on the safe side and report the incident. FDA would then determine if the food was a reportable food.

Publicly available

Obviously, a reportable food indicating further action—for example, a recall—will be public knowledge at some point. What is still unclear from

FDA at this juncture is whether a report that is later determined by the agency not to be a reportable food will still be made available to the public. If it is, this could have a negative impact on the inclination for responsible parties to file reports when the probability of harm is borderline.

It is assumed that the severity of the potential penalties for noncompliance will dissuade this from happening. Some have also expressed concern that this reporting requirement may actually discourage routine safety testing. ●

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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Is vitamin C needed?

Vitamin C (ascorbic acid) was discovered in 1928 as the agent in citrus that prevented scurvy. The structure of what was then called hexuronic acid was identified by Haworth in 1933, and a process for its synthesis was described by Reichstein in that same year.

In the ensuing years, a great deal has been discovered about vitamin C. We have learned that humans and a small fraction of animals like guinea pigs, some carnivorous fish and several species of birds require a dietary supply because they cannot synthesize adequate amounts of vitamin C. They lack adequate liver *L-gulonolactone oxidase* activity, the rate-limiting enzyme, to convert carbohydrates such as galactose or glucose into ascorbic acid.

But most of the rest of the world's species, including dogs and cats, are capable of producing adequate quantities in the course of normal metabolism. Given this, you would think dietary vitamin C would be about the



Why is supplementing with vitamin C so common in petfoods?

— Greg Aldrich



last topic of discussion on ingredients used in dog or cat foods. However, supplementation with vitamin C is a common practice in petfoods. Why?

First responder

Vitamin C is water soluble, reasonably safe at high doses and, most importantly, a potent antioxidant. It behaves like a first responder on the scene, ready to sacrifice itself to revive the oxidized victims and refresh other antioxidant rescuers in the process. It is the most sensitive vitamin to oxidation and, because of this role, is one of the most important for the oxidative

stability of extracellular fluids.

At the molecular level, vitamin C is involved with reversible oxidation reduction activities. Its ability to donate and receive one or two electrons in numerous biochemical reactions places it in a critical role in collagen synthesis, immunity and regeneration of antioxidants such as vitamin E and carotenoids such as beta-carotene.

Steady speculation

Most nutrition experts would agree vitamin C is not a dietary requirement for reproduction, growth or maintenance of normal healthy dogs or cats.

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But because of its role in so many fundamental processes, there has been steady speculation, as evidenced by the multitude of case reports and research studies, that vitamin C could be conditionally required or at least beneficial for dogs and cats.

This belief may be fueled by our own requirement for dietary vitamin C and the anthropomorphic transference of this need on to our pets. Or it may be based on the understanding that compared to other species, the rate of vitamin C production is slow in dogs and cats, which might in turn compromise their ability to rally reserves in times of stress, disease or trauma.

It behaves like a first responder on the scene, ready to sacrifice itself.

During the 1960s and 1970s, numerous research studies were aimed at testing this hypothesis. In this body of research, vitamin C was evaluated as a curative agent for hip and joint diseases and osteoarthritis because of its association with collagen synthesis. Other researchers supplemented mega-doses of vitamin C to:

- ▶ Treat viral infections;
- ▶ Reduce healing time;
- ▶ Aid drug clearance rates; and
- ▶ Promote a healthy urine pH in cats.

Unfortunately, most of the studies failed to unequivocally demonstrate the intended benefit of vitamin C supplementation; but that hasn't deterred its proponents from including it in pet diets.

Getting it into pets

So, how does one go about getting vitamin C into a pet diet? There are



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some naturally occurring ingredients high in vitamin C such as rose hips, citrus fruits and *brassicus* vegetables (e.g., brussel sprouts and cauliflower). But these are not popular or well-received ingredients in petfoods.

More common petfood ingredients that possess measurable quantities of vitamin C are derived from select animal tissues, with the highest concentrations found in organ meats like liver and in some fish. The challenge is that these are not generally sufficient in vitamin C to achieve meaningful levels in the food. To fill the gap, commercially produced sources are necessary.

This belief may be fueled by our own requirement for dietary vitamin C.

Chemically, there are four stereoisomers of vitamin C, two of which have activity. The first is L-ascorbic acid, considered to be the active vitamin compound; the second is erythorbic acid, which has 1/20th the activity and is commonly used as a functional antioxidant in processed fruits and meats.

Two methods

For fortification of petfoods, we are most interested in the L-ascorbic acid moiety. There are two principal methods for its commercial production.

The traditional method is based on the process described by Reichstein in the 1930s. This is a multistep conversion of sorbitol (derived from glucose) to ascorbic acid via reaction with a nickel catalyst, followed by oxida-



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tion and cyclization steps via either *Acetobacter* and platinum, or permanganate.

The newer methodology, which begins with the same starting material (sorbitol), follows a two-stage fermentation process with purportedly non-genetically modified micro-

organisms. This method is believed to be more environmentally friendly and is now gaining some popularity as issues of cost efficacy are resolved.

Regardless of method, today the vast majority of the world's ascorbic acid supply comes from China.

Compared to other species, the rate of vitamin C production is slow in dogs and cats.

Surviving the process

In food systems, L-ascorbic acid is readily oxidized by elevated temperatures, basic pH and high oxygen partial pressures. These are the same conditions encountered in the processes of producing a high-gel wet food (elevated pH) or cooking through extrusion or baking (elevated temperature and oxygen).

Unlike the biological system where vitamin C's ready-response to electron exchange is beneficial, in the food system it represents a one-way loss of dietary vitamin C to the animal. So, to ensure the desired level of vitamin C survives the process, a preparatory step to stabilize the molecule is necessary.

A common approach is to chemically bond the free ascorbic acid to a protective ligand. For example, sodium ascorbate is a common form in the food industry and is used in a limited number of petfoods.

The more common form in dry extruded petfood evolved out of the aquaculture industry in which ascorbic acid is bound to a phosphate (e.g., L-ascorbyl-2-polyphosphate). Survival of this molecule through extrusion is reported to be near-100%. The phosphate is enzymatically cleaved during digestion to liberate the ascorbic acid and results in vitamin C availability nearing 100%.

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Despite the body of evidence that fails to show an impact on animal performance or overall health resulting from dietary supplementation with vitamin C, the frequency at which it is appearing in petfoods is increasing rather than decreasing.

The biggest reason is likely to provide a message that consumers can relate to—that the product is fortified with a ready reserve of antioxidants, should other antioxidant compounds become depleted.

To that end, if diets are fortified with stabilized forms of the vitamin,

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

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Market Report

Senior, overweight pets underpin health push

For several years, virtually all dollar growth in the US petfood market has come from pricier products, reflecting both higher ingredient costs and deliberate efforts of marketers to “premiumize” products. Also, the potency of the human/animal bond is a driver of consumer willingness to spend amounts that would have been almost unimaginable less than a decade ago (even during a recession), especially on health and wellness products. But not all the action is marketing driven. Two other macrotrends are responsible for much of the power behind the premium pet health product surge: senior pets and pet overweight/obesity.

Older pets = stronger bonds

The most direct driver of interest in senior pet products is of course the aging pet population, since a larger population of older

Two macrotrends are behind the premium pet health product surge.

pets means that more companion animals are suffering from age-related issues such as joint, coronary, cognitive and immune-system-related conditions. According to the American Veterinary Medical Association’s 2007 *US Pet Ownership & Demographics Sourcebook*, the percentage of the US dog population age 6 or older increased from 42% in 1996 to 44% in 2006, while the percentage of cats age 6 or older rose from 37% to 44%.

In the American Pet Products Association’s 2009-2010 *National Pet Owners Survey*, among single-dog owners the average age of the pet is 6.6 years, while among single-cat owners the average age is 8 years. Pets are living longer because their owners are taking better care of them, both medically and nutritionally. Perhaps even more important, longer lives mean ever stronger emotional bonds and thus an increased willingness among pet owners to do whatever it takes to keep their pets healthy and happy for as long as possible.

Swelling population

Correlating with the rising population of senior pets is the growing tendency of pets to be overweight or obese. According to the Association for Pet Obesity Prevention’s (APOP) second annual National Pet Obesity Day Study, conducted in October 2008, 44% of dogs and 57% of cats are either overweight or obese, with the proportions of overweight dogs and cats up 1 and 4 percentage points, respectively, since 2007 (Figure 1, p. 61).

The study also reveals older animals have a higher incidence of being overweight, with 52% of dogs and 55% of cats over age 7 found to be overweight or obese. “This is a particularly concerning discovery for veterinarians,” explains the study’s lead investigator and APOP founder, Dr. Ernie Ward, in a press release. “Extra pounds in older pets amplify any pre-existing conditions and complicate treatment. We’re seeing more diabetes, respiratory and arthritic conditions as a direct result of obesity.”

The senior and aging pet trends are having a clear—and growing—impact on the US petfood market. According to Expe-

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Figure 1. Percentage of overweight/obese pets in US

In just one year, the number of overweight or obese cats jumped four percentage points, while for dogs, the percentage increased by one.

Source: Association for Pet Obesity Prevention

Animal type	Overweight/obese	
	2008	2007
Dogs	44%	43%
Cats	57%	53%

rian Simmons consumer survey data, 20% of dog or cat owners who purchase dry or wet food—about 12 million—regularly purchase senior or light/weight management foods as of winter 2008/2009, up from 16% in 2004 (Figure 2).

US\$3 billion + retail market

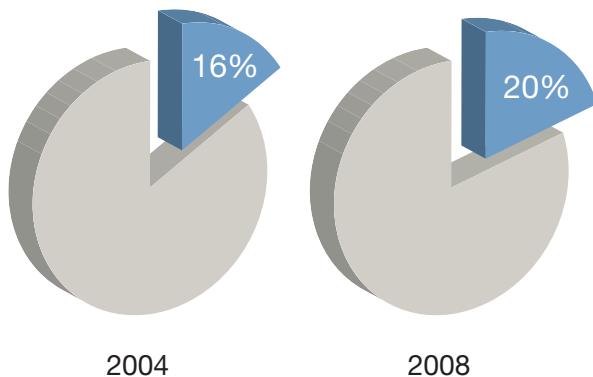
According to Packaged Facts' latest pet market report, this adds up to more than US\$3 billion in senior and weight management dog and cat food sold at retail. The true total may be much greater, however; these are market segments that can only broaden in the years to come. Companies closely associated with senior health and weight management likely also will reap the rewards of being viewed as overall pet health experts at the center of the lucrative wellness movement. ●

Information provided by Packaged Facts (www.packagedfacts.com) based on reports including *The US Market for Senior, Overweight and Disabled Pet Products* (September 2009).

Figure 2. US purchases of light/weight management petfoods

From 2004 to 2008, the number of US households with dogs or cats that purchased light or weight management petfoods (dry and wet) increased by four percentage points.

Source: Experian Simmons, Winter 2008-2009 Study of Media and Markets; compiled by Packaged Facts. Material used with permission.



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Research Notes

Recurrence of obesity in Beagles

A study used commercially available dog food combined with human food to mimic at-home snacking and diet supplementation. Adult female Beagles ($n = 9$) with free access to water and exercise were allowed to eat *ad libitum* two times their daily calculated number of calories using a dry extruded diet plus a blend of canola and soybean oils. After three weeks, pecan shortbread cookies were added.

Obesity was induced during a 19-week period with 1,875-2,250 kcal/day consumed on average. The dogs were then subjected to a weight-loss regimen while consuming 490-730 kcal/day. After weight loss, a similar degree of obesity was re-induced for 17 weeks even though dogs consumed only 1,125-1,250 kcal/day.

Less time and fewer kcal were required to re-induce the same degree of obesity compared with the initial obesity induction. Human snack foods appeared to stimulate appetite and thus contribute to the obese state. Food efficiency was also increased during the obesity re-induction period

Key Concepts

► Recurrence of obesity in Beagles

(JAPAN. PubMed ID: 19364373) Less time and fewer kilocalories were required to re-induce the same degree of obesity compared with the initial obesity induction. Human snack foods appeared to stimulate appetite and thus contribute to the obese state.

compared with the induction period. This information may help pet owners understand the need to limit table scraps and human food snacks in dogs prone to obesity and how to maintain ideal body weight after weight loss.

Source: D. Nagaoka *et al.*, 2009. Re-induction of Obese Body Weight Occurs More Rapidly And At Lower Caloric Intake In Beagles. JAPAN. PubMed ID: 19364373.

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Ad Index

Company Name	Page No.	Company Name	Page No.
3D Corporate Solutions LLC.....	8-9	Lonza Group.....	18
www.3dcorp.com		www.carniking.com	
Acadian AgriTech.....	58	Lortscher Agri Service Inc.....	21
www.tasco.ca		www.lasibern.com	
ADF-Amer Dehydrated Foods.....	3	Marshall Indust Dried Goods.....	57
www.adf.com		www.orchardsweets.com	
Aeroglide Corp.....	22	Martek Biosciences.....	56, 62
www.aeroglide.com		www.martek.com	
AFB International.....	34-35	Neogen Corp.....	20
www.afbinternational.com		www.neogen.com	
Agri Systems.....	40	North State Flexibles.....	25
www.agrisystems.com		www.nsflexibles.com	
Ameri-Pac Inc.....	14, 37	Novus Nutrition Brands LLC.....	11
www.ameri-pac.com		www.novusint.com	
Andritz Sprout A/S.....	36	Omega Protein Inc.....	42
www.andritz.com/ft/		www.omegaproteininc.com	
Bemis Flex Pkg-Millprint Div.....	IBC	Pactiv Corp.....	47
www.bemis.com		www.pactiv.com	
BHJ A S.....	33	Palmetto Industries.....	19
www.bhj.dk		www.palmetto-industries.com	
Bill Barr & Co.....	49	Peel Plastic Products Ltd.....	43, 45
www.billbarr.com		www.peelplastics.com	
Buhler Inc.....	23	Petfood Industry Strategic Consultants.....	59
www.buhlerinc.com		www.pharmachem.com	
Cady Bag Company.....	52	Pharmachem Laboratories.....	41
www.cadybag.com		www.pharmachem.com	
Cargill Sweetners N A.....	13, 15	Premier Tech Sys.....	48
www.cargill.com		www.premiertechsystems.com	
Coating Excellence Intl.....	IFC	Roberts Packaging.....	57
www.coating-excellence.com		www.robertspackaging.com	
www.super-tube.com		Sanimax Marketing Ltd.....	46
Dinnissen BV.....	12	www.sanimax.com	
www.dinnissen.nl		Smith & Laue Search.....	10
DSM Nutritional Prods Ltd.....	68	www.linkedin.com/in/charlesdsmith	
www.dsmnutritionalproducts.com		SPF Diana.....	5
EnviroLogix.....	28	www.spf-diana.com	
www.envirologix.com		Summit Ridge Farms.....	51, 53, 55
Ever Extruder.....	63	www.srfarms.com	
www.everextruder.com		Tapco Inc.....	7
Extru-Tech Inc.....	32, 55	www.tapcoinc.com	
www.extru-techinc.com		The Auction Group LLC.....	53
Geelen Counterflow BV.....	BC	www.theauctiongroup.net	
www.geelencounterflow.com		The Peterson Co.....	39
Hesco.....	28	www.thepetersoncompany.com	
www.hesco-inc.com		The Scouler Company.....	63
Hood Packaging Co.....	31	www.industrialfoodingredients.com	
www.hoodpkg.com		Trouw Nutrition USA LLC.....	1
InterZoo 2010.....	29	www.trouw-nutritionusa.com	
www.interzoo.com		US Commodities.....	33
Intl Ingredient Corp.....	61	www.agmotion.com	
www.iicag.com		Wenger Manufacturing Co.....	61
Kemin Nutrinsurance Inc.....	14, 16-17	www.wenger.com	
www.kemin.com		Western Sugar.....	51
		www.westernsugar.com	



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