

# FOOD GLORIOUS FOOD

In the past, dogs were fed scraps. Today, the pet-food market is big business with a food to suit every budget and taste...

**D**espite the recession, business is booming for pet food manufacturers and this year the total market value topped £2bn for the first time. Last month we looked at the history of prepared pet food and how we got to the global market we have today. This month we look at the latest trends in dog food and why we spend so much money feeding our pets.

With the UK's pet food industry employing more than 8,000 people and producing around £1bn of dog food each year, it is a large player in the economy. The dog food market showed a healthy growth of five per cent in 2009, driven by rises in the price of raw materials and an increase in popularity of premium and super-premium products. It is estimated that the pet-food market accounts for 60 per cent of the calorific intake of eight million dogs, split into £449 million dry food, £325 million wet food and £214 million treats.

Considering pet care in general, the past 20 years have seen a real acceleration in growth, which is reflected in the variety of products and services now available. According to Euromonitor, the global pet-food market in 2009 was valued at \$52bn and the level of growth has been relatively healthy, considering the global economic downturn. Growth in specific areas, such as Eastern Europe and Latin America, and the popularity of super-premium products has meant a positive picture for the global market.

**Complete package** Sustainability and the environment, in particular carbon impact, are of increasing importance to customers, which is driving innovations in packaging, such as zip and re-close openings. Provenance is also important to some pet owners, including concerns about issues such as animal treatment and the impact on the countryside.

Ben Thompson of the Pet Food Manufacturers'

Association (PFMA) Market Data Group comments, "Green Karma is the concern for our lifestyle and how the products we use affect the environment: buying wind energy credits; drinking Fair Trade organic coffee; recycling; bringing our own bags to stores and so on. We can see these trends having an effect on pet foods."

In recent years there has been strong growth in life-stage, lifestyle and other foods described as 'advanced nutrition'. Scientific advancements in pet nutrition mean that manufacturers are now not only thinking about meeting the basic nutritional requirements of pets but also how health and wellbeing can be further supported by using added beneficial ingredients.

Talking about scientific development in this sector, Pauline Devlin of the PFMA Veterinary Nutrition Committee comments, "Nutrition plays an important role in the correct functioning of the immune system and there are now products with

specific antioxidants to help support this. Other producers may include green-lipped mussel, glucosamine and chondroitin sulphate to help maintain joint health."

#### Food aid

The first commercial dog food to help naturally control worms, fleas and ticks has recently been brought to market by NatureVito Ltd under the Green Dog brand. The manufacturer claims that regular use of the food, made from 100 per cent human-grade ingredients with only herbal vitamins and minerals, will reduce the need for chemical worming.

In addition to these recognised trends, a Market Research Report carried out by Mintel in March 2010 identified some new developments in the US that are set to break into the UK market. These include restaurant-style dog meals, such as Tuscan Style Stew with Braised Beef, celebrity chefs creating dog food ranges, and the first national brand of refrigerated dog food. ▶



# All you need to start feeding raw is a freezer...



All of the products contain fish oils for omegas and are rich in natural probiotics, vitamins and minerals, because the foods haven't been subjected to industrial processing.

Anna Webb has fed her eight-year-old Miniature Bull Terrier, Molly, on tripe all her life. Up until recently she had to buy beef tripe on its own and mix her own potato and vegetables with it to make a balanced diet for Molly. Now, thanks to Natures Menu, she can get her favourite tripe ready mixed and straight to her freezer for more convenient feeding.

"In the wild, dogs eat the stomach of their prey first and I think there's a reason for that," says Anna. "Apart from the natural stringy texture of tripe working like dental floss between the teeth, the rich enzymes contained in tripe's gastric juices keep teeth clean. I have never brushed Molly's teeth, yet they are in superb condition, so much so that her teeth were recently inspected by PDSA vet Sean Wensley on the radio show *Barking at the Moon* and he guessed her age as two years old based on her pearly whites! Natures Menu only uses the best tripe, which is raw and unprocessed, and I think it's a fantastic, convenient solution for all pet owners."

AMP is a family-run business that has supplied raw food to pets for the past 30 years. Its original range - Prize Choice - is just raw food packaged simply with products such as chicken wings and beef tripe, but AMP found that this style of pet food did not always suit pet owners, who were more accustomed to processed brands. The company's ethos is that dogs should be fed food as naturally as possible but it understands that some owners and pets might find raw difficult or hard to understand.

Ten years ago AMP created the Natures Menu brand, offering varieties of dog foods in tins and pouches, made with minimal processing and using only the best ingredients in an effort to get more pets feeding naturally.

AMP then maximised the potential of raw diets by creating Biologically Appropriate Real Foods (BARF) under the Natures Menu brand, which are

completely balanced raw frozen meals for dogs. It has taken the guess work out of nutrition for pet owners who want to feed raw as the main food for their pets by combining the right balance of fresh premium meat cuts with carbohydrates, vegetables, fish oils, fruits and herbs. Feeding raw has suddenly become as easy as opening a packet or can of regular dog food and, as a result, is appealing to a wider spectrum of owners who feel that convenience is a must.

The raw varieties arrive frozen, ready to go straight into your freezer, and you simply take out the amount you need for the next day and leave it to thaw in the fridge overnight. The Natures Menu frozen range is available in either nuggets or blocks, depending on your dog's preferred texture, and comes in several varieties, including tripe with liver, vegetables and rice, and chicken and fish with vegetables and parsley.

Despite multi-national giants, such as Masterfoods and Nestle Purina Petcare, owning around two-thirds of the dog-food market by value, it hasn't stopped small, independent pet-food producers from being successful. Over the past five years the growing interest in niche areas, such as organic and natural, has created an opportunity for small companies to respond to these trends. There has been a noticeable rise in the demand for organic pet food in the last year and online chemist Chemist Direct has reported a 20 per cent rise in orders of organic varieties while sales of regular brands have remained the same.

For larger companies, supplies of raw materials can be an issue. The limited demand for organic products in the human food market means a limited supply of by-products for pet food. Producing an organic pet food may not be commercially viable for all companies at this stage.

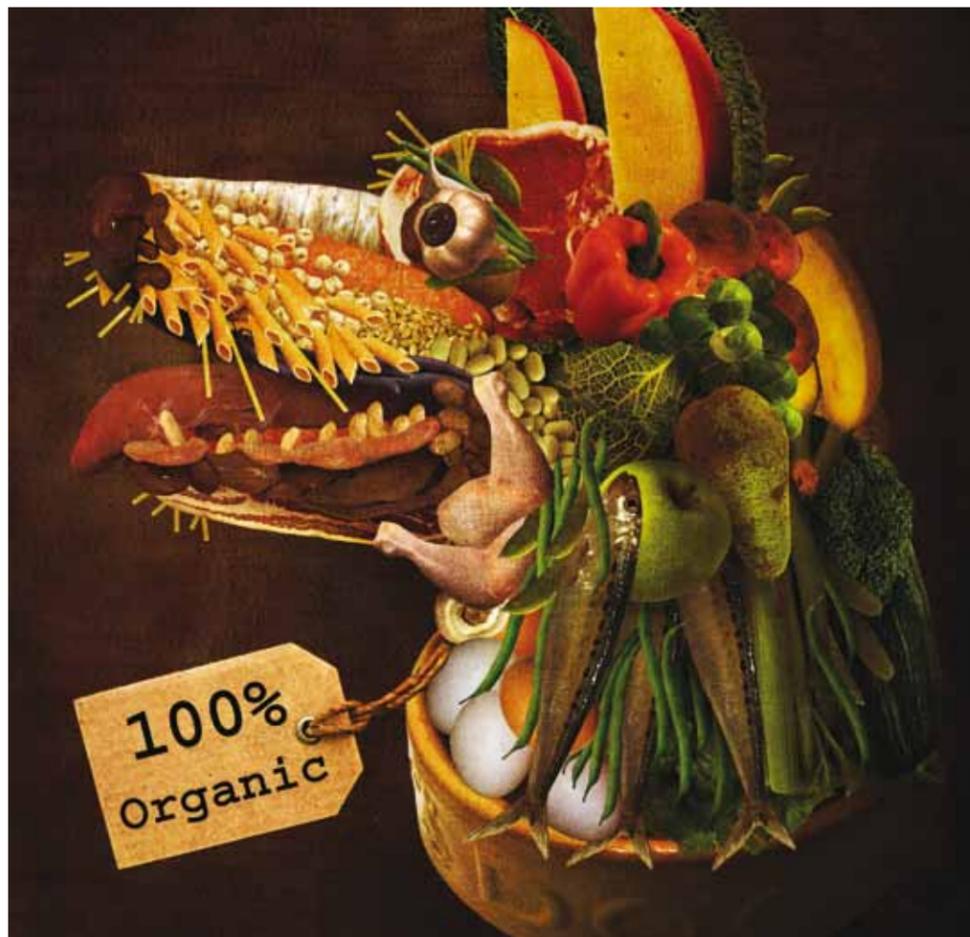
## Organic growth

With so much choice available these days, how can you decide what to feed your dog? The PFMA has the following advice: "All pet foods are subject to the same legislation, which ensures safety. The definition 'complete' is a legal term and pet foods labelled as such must contain all the nutrients a pet needs in the right quantity for healthy body function. Beyond this, members of the PFMA follow the Codes of Practice produced by the European Pet Food Association, FEDIAF, which include the Guide to Good Practice for the Manufacture of Safe Pet Food, and Nutritional Guidelines for Complete and Complementary Pet Food for Cats and Dogs. After these fundamentals it comes down to the needs and preferences of the individual pet and owner. There is something to meet all needs, whether it's a value product or super-premium, a natural pet food or a diet incorporating the latest science."

If advertising and marketing is confusing you when it comes to choosing pet food, the best advice is to look closely at the labels. To help

Find out more at [www.naturesmenu.co.uk](http://www.naturesmenu.co.uk) or telephone 0800 0183770.





consumers better understand pet food labels, FEDIAF is producing a Community Code of Good Labelling Practice with recommendations for clear labelling. This will include definitions for terms such as 'organic' (based on EU legislation) and 'natural'. FEDIAF does not set a definition for 'holistic' as it is such a broad term that is very hard to quantify. It is down to the individual companies to justify the marketing term.

The new Regulation on the Marketing and Use of Feed, which will be published on 1 September 2010, will harmonise the labelling of pet food in all the 27 EU member states even further than under the current legislation that dates back to 1979.

The PFMA chief executive, Michael Bellingham, comments, "We recognised the need for an overhaul in the existing legislation and have worked hard for the last five years to ensure that there were in place new rules reflecting the needs, not only of the industry, but

## Barking Heads on being the underdogs



Breaking into a pet-food market dominated by massive multi-national corporations is no mean feat, but small, independent producers are popping up all over the place. New manufacturers are finding niches and angles not currently catered for by the big boys and they are being rather successful at it, too.

Barking Heads may only be 18 months old, but it is built on 50 years' experience of the pet-food industry. Paul Hunter and Dave O'Regan previously worked for a company that imported and distributed an American super-premium pet food and they decided to go into business together to produce food for what they saw as a gap in the market. After a lot of research, development and testing, they launched their first varieties in December 2008. With their quirky names and branding, Bad Hair Day, Tender Loving Care, Golden Years, Puppy Days and Fat Dog Slim, they have found a dedicated following.

"What make Barking Heads different is quality and quantity," explains Paul. "We have pushed the manufacturing process to the absolute limits to include more meat in our kibble and we use natural ingredients that are naturally preserved. All the ingredients we purchase are sourced in Britain where possible, so we use Welsh lamb, Scottish salmon and English chicken."

Despite the competition, Paul was not worried about whether there would be room for another pet food. He says, "There is always room for better products that take advantage of technological advances. Our products are different, they are unique and they set new standards for the industry."

Barking Heads is not intimidated by the big boys either and describes being a small, independent producer up against multi-national giants as, "Great fun!" He continues, "The British public always loves the underdog and, as with any underdog in any walk of life, we'll always try harder. We often feel like David in Goliath's shadow and sometimes it's hard, but we are extremely passionate about Barking Heads and are continually rewarded by both our retail stockists and consumers alike with their successes."

Find out more at [www.barkingheads.co.uk](http://www.barkingheads.co.uk)



## A German import helps a German Shepherd



For the first two-and-a-half years of her GSD's life, Beate Rothon tried every single dried dog food on the market, but she still had a fussy eater. Zenna had been ill with food poisoning as a puppy and, ever since, she'd had a permanently runny tummy.

Beate remembers, "I tried everything and still ended up sitting on the kitchen floor

supervising each meal, using various appetizers to get her even eating in the first place. It was no fun."

During a trip to Germany, a GSD breeder recommended a complete food that he had been feeding to all his dogs for over eight years.

"I did not want to change Zenna's food just before travelling back to England, as we'd be spending a lot of time in the car, but Zenna decided otherwise," said Beate. "She refused the food that I had brought with me and went straight on to Markus Muehle. I donated the food I had to a local charity and loaded up the car with the new food. This was three years ago and we haven't had a problem since!"

Beate, who lives in north Cornwall, contacted Markus Muehle and found out that there was no UK distributor for the food. After introducing it at a trade show in September 2009, Beate was asked if she'd take on the job of bringing it to the UK. Beate runs her own underwater photography business and had no experience of the dog-food industry, aside from breeding and training GSDs. However, she was passionate about the food and willing to learn but, with so many pet foods already in the UK, why is there a need to import another from Germany?

Although new to the UK, dogs in Europe have been enjoying Markus Muehle for more than 30 years. What makes it different to other dried pet foods is that instead of using the extruding process, the company has created its own cold pressing method, which allows the nutrients in the food not to be destroyed.

Beate says, "Our biggest problem is to convince the retailers that Markus Muehle is a different food at a time when they are bombarded daily with new products. The main philosophy is not just about creating a complete dog food that is as natural as possible but doing it in a way that goes hand in hand with nature without exploiting it."

For more information, visit [www.markus-muehle.co.uk](http://www.markus-muehle.co.uk)

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How would your dog like to win a six-month supply of Acana Wild Prairie food?

Acana is produced in Canada and sold in 50 countries worldwide, which means it is certified to meet every international food standard.

The food's high protein levels (60 per cent meat), low carbohydrates, and fruit and vegetables in place of grain, provide balance without excess. The idea is that the diet mirrors the diet a dog would have had naturally in the wild to promote peak health.

The ingredients used are fresh and local, and include free-run chickens, whole eggs, lake whitefish and northern walleye.

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[www.mutleyandmog.co.uk](http://www.mutleyandmog.co.uk)

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Acana Comp, *Dogs Today*, The Dog House,  
4 Bonseys Lane, Chobham, Surrey GU24 8JJ.  
Closing date for entries is 9 September 2010.

# Happy 40th!

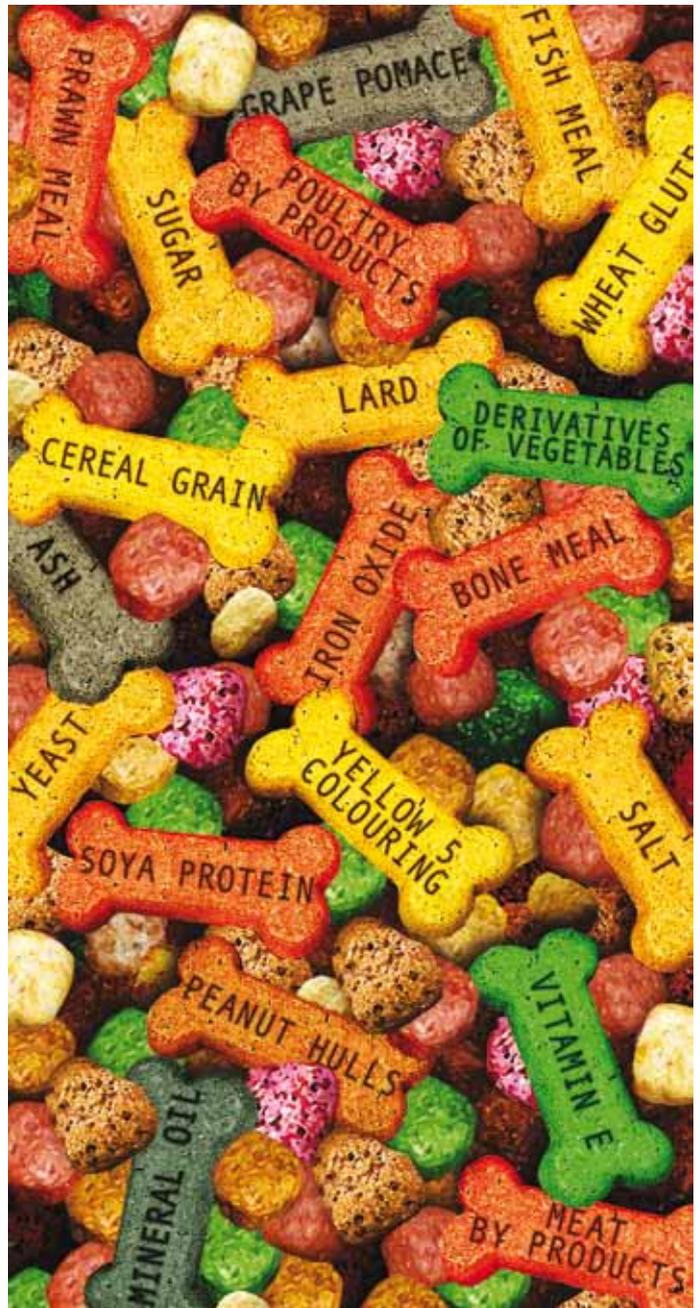


This year marks the 40th anniversary of the Pet Food Manufacturers' Association (PFMA) - the principal trade body representing the UK pet-food industry. Today, the PFMA has grown to 60 members, representing 90 per cent of the prepared pet food sold in the UK. It is made up of both big, global players and smaller UK-based companies, which brings diversity and innovation to the pet-food market. Membership ensures that the ingredients, marketing and labelling are transparent, as members agree to conform to an industry code of conduct on Good Practice for the Manufacture of Safe Pet Food and Nutrition Guidelines, among others.

The PFMA also promotes responsible pet ownership among the UK's 13 million pet-owning households and has this year launched its '2020 Vision', which focuses specifically on pets and people, reducing the environmental impact of the pet-food industry and promoting advantages of commercially pre-prepared pet food to the consumer.

Paul Miley, managing director of Burgess Pet Care, took up the role of PFMA chairperson this year. He says, "The PFMA's primary focus is to promote responsibility, as pet owners, as environmentally responsible manufacturers and fostering a society that understands the beneficial role that pets play in family life. These are all values at the heart of Burgess Pet Care's business ethos which I can draw upon during my PFMA role."

As part of its promotion of responsible pet ownership, the PFMA has been looking at the growing issue of obesity in the UK. It has developed a 'Pet size-o-meter', which is an easy way for dog owners to assess whether their dog is overweight. Owners can assess their dog's condition using the Pet size-o-meter on the PFMA website at [www.pfma.org.uk/petometer.html](http://www.pfma.org.uk/petometer.html)



also the requirements of our customers. For that reason, we commissioned independent market research into consumer attitudes to labelling, which we shared openly with the European Commission and which influenced their thinking. These new rules will have an impact on how cat and dog food - plus, from now on, other small animal food - is manufactured and marketed. This is not only with regard to the legal requirements but, perhaps more importantly, in respect to clarity in making and substantiating claims."

The new regulation sees the introduction of headings such as 'Composition', 'Additives' and 'Analytical Constituents',

which should make reading labels easier for the consumer. In addition, labelling terms that have led to confusion in the past, such as 'ash', can be replaced by other terms. The new regulation also provides that there should be easy ways for consumers to contact the manufacturers with telephone numbers and email addresses etc printed on the packaging.

We really are spoilt for choice when it comes to pet food and the competition in the market ensures that if brands aren't good, they don't survive. With the ongoing research and technological advancements, the future of pet food is sure to be bigger and better. ■

**NEXT MONTH:** Find out what we'll be feeding our pets in the future as we ask industry professionals for their pet-food predictions.

