



PETS International

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Food and ingredients

Mega health trends, plant-based and functional foods.

Global pet industry

'Other' more exotic pets and GlobalPETS Forum news.

Eastern Europe and Russia

Deep dive into Russia, Ukraine, Belarus and Hungary.



“A HEALTHY WAY TO BEAUTY”. A NEW MARINE SUPERFOOD FOR CATS AND DOGS

The Marine BEAUTY line from the super premium brand Optimeal is being launched to the market in October 2021. All products are developed by R&D team of Kormotech company.

The Marine BEAUTY line is developed using a holistic approach for wellbeing, harmonious life, and natural beauty of your pet. After all: A healthy animal is a beautiful animal, and in a healthy body - a healthy spirit.

A special feature of the line is the "beauty ingredients". These are fish and marine proteins such as salmon, herring, shrimp, mussels, and krill. The line includes 3 dry food products for dogs and similar for cats: FITNESS, PODIUM and HARMONY. Each of the products is unique and has its own concept.

fitness is a customized no-grain diet, that helps cats and dogs maintain their naturally healthy weight and keep a perfect physical condition.

podium is a nutritious formula, developed by the R&D team to reveal the unique natural beauty of your pet. PODIUM kibbles contain special Dental Pearls, which delicately help to remove dental plaque in the process of biting each granule. The product is made using ancient grains and borage oil.

harmony is a perfectly balanced formula with a mild calming effect, containing Lemon balm and Chamomile flowers.

The range of the line is complemented by wet food rations for cats. These are canned tuna pieces with seafood.

All products in OPTIMEAL Marine BEAUTY line are enriched by Immunity Support Mix, the active ingredients of which are purified 1.3 / 1.6 beta-glucans. These are active compounds of natural origin that help activate the body's immune cells. Immunity Support Mix also contains prebiotics MOS and FOS, which maintain the optimal balance of microbiome. The highlight of the line are natural antioxidants: rosemary extract, aloe vera, blueberries, cranberries, astaxanthin, the source of which is krill and shrimp. Diets are also enriched with minerals - selenium (Se) and zinc (Zn), the main source of which are dehydrated fish proteins, fish and seafood. The complex of natural antioxidants is an effective means of preventing the destruction and premature aging of cells, which helps stimulate the body's defenses and maintain a healthy immune system.

In addition to the proven excellent taste properties, the Marine BEAUTY line is designed to keep your pet in good shape and contribute to a luxurious appearance. Additionally, it helps maintain a healthy emotional balance and a harmonious life of a pet.

healthy way to Beauty



Highlights this issue



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Food and ingredients

Pet food is constantly influenced by human food trends. We focus on plant-based and other (health) trends, such as natural, functional and antimicrobial ingredients. Plus, what are key puppy food requirements, and what can the industry do to fight food fraud?



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Zoomark and the Italian market

Zoomark, the first 'live' tradeshow in Europe in 2021, with a record number of exhibitors, heralds a new approach to connecting and networking. And we zoom in on the pet market in Zoomark's host country, Italy.



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Eastern Europe and Russia

In general, the pet industry in the region has grown during the pandemic. But a closer look at the specifics of pet markets in Russia, Ukraine, Belarus and Hungary reveals some interesting differences.



50

Global pet industry

Preparations for the GlobalPETS Forum 2022 are in full swing. A preview of top speakers and their topics, award nominees, sponsors and more. Also, we dive into the world of pets other than dogs and cats. What can trade and industry do to support exotic pets' welfare?

And further in this issue

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Time for some new topics

Summer is officially over, and we have kicked off the new 'business season' with a design refresh of our website and newsletter. What do you think?

Zooming into the magazine: with health all the rage, we dive deeper into current health trends the industry can benefit from. Leveraging ingredients to use pet food as medicine is nothing new. But it can easily fall into a 'grey zone', with potential regulation, definition and consumer perception issues. We highlight factors to watch out for when developing new pet food. While we covered alternative proteins in our September issue, plant-based food is perhaps an even hotter topic. How can a plant-based pet food brand bring you success? And what about digestibility? Discover more on page 14.

Next month brings the first 'in-person' international trade show in Europe, so this issue would not be complete without news of what to expect, who are some of the companies attending and how the pet industry in Italy – home of Zoomark – is doing.

We have taken a closer look at some other countries too. Although virtually all pet markets have benefitted from the pandemic, the Russian market is an exception. On page 42 you will see why. There are – fortunately – positive stories as well. Hungary, for example, has experienced tremendous growth. But not all channels benefitted equally (see page 48). And besides facts and figures on the industry in Ukraine and Belarus (page 46), you will discover more about Serbia, Slovenia and Croatia from the perspective of a local retailer and distributor in an interview on page 56.

PETS International articles often focus on cats and dogs. But the world of pets does not stop there.



So in this issue, we look at how the market of the less common 'other' pets is doing.

Finally, with our GlobalPETS Forum coming up in January, you can read about the forum theme and speaker line-up. We also present the nominees for our annual award and our sponsors. People are already registering, so if you are interested in joining us, just head over to our website.

Philippe & Corine

Philippe Vanderhoydonck, Managing Director
& Corine van Winden, Board member

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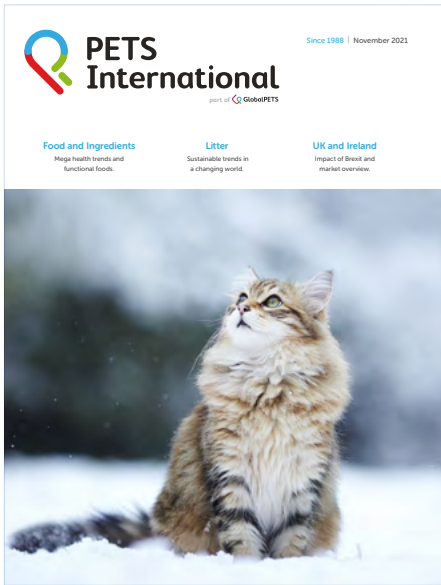


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Consumer research

Sustainability
Trends

Global pet industry

Retail insights

Cat market opportunities

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Contact head office (see page 80) or local representatives (see page 79).



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Pet industry highlights



Zoomark

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National Exhibition & Convention Center (NECC),
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Correspondence may be edited for clarity or length.

Fressnapf Group posts record half-year results

With 21.2% growth in the first six months of 2021, the German retail giant sets its sight on €3 (\$3.5) billion in sales by the end of the year. In its most successful first half of the year to date, gross sales totalled almost one and a half billion euros (one and three-quarter billion dollars). Sales grew by €273 (\$322) million compared to the previous year.

Of the €1.48 (\$1.74) billion in sales, €857 million (\$1 billion) was in Germany, with the remaining €624 (\$734) million coming from the other ten countries where the group is active.

The number of transactions increased by 13.3%, representing almost fifty million customers. The average ticket size has also grown by 7%, with Fressnapf and Maxi Zoo customers shopping – on average – for €25 (\$29) each.



Plaček Group opens its 300th pet store

After opening fifty stores this year – with more stores to come in the next few months – the retailer is celebrating a big milestone: its 300th store. The 370 sqm store is located at the VIVO! Hostivař shopping centre in Prague, Czech Republic.

“This beautiful pet store, with the incredible number 300, is a great milestone on our exciting journey which seems like it is never-ending. During this calendar year, we have already opened fifty stores, and by the end of the year we will have opened about 25 more units,” says Dušan Plaček, founder and owner of Plaček Group.

Plaček Group operates 130 Super zoo and 6 Zoomarket stores in the Czech Republic. Slovakia has 62 Super zoo stores and Romania 2. In Latvia, there are 46 Dino zoo stores and in Russia another 2. In Poland, its 52 stores are branded Kakadu.

United Raw Pet Foods acquires two Canadian speciality retailers

United Raw has acquired Lucky Paws, a pet speciality retailer with two locations. Its second acquisition is A Pet's Life with one location.

These two acquisitions mark Dane Creek Capital Corp.'s third and fourth acquisitions of pet speciality retailers and bring the total of owned locations on Vancouver Island to six. Earlier this year, it announced the acquisition of Growlies Pet Foods Inc.,

located in Langford, British Columbia, and The Wild Side Pet Boutique Inc., with its two locations in Nanaimo and Qualicum, also in British Columbia, Canada.





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Legault Group gains stronger position in Canadian retail market

The Quebec-based family business that already owned Mondou has expanded its position in the Canadian pet retail market with the acquisition of Ren's Pets stores. Founded in 1975 in Oakville, Ontario, Ren's Pets now has 35 stores – 31 in Ontario, 2 in New Brunswick and 2 in Nova Scotia, as well as a distribution centre in Guelph. In the past few months, the company has opened three stores and plans to open three more by the end of the year. It employs close to 500 people and also has a transactional website for online orders that it ships across the country.



Multiple takeover bids for Zooplus

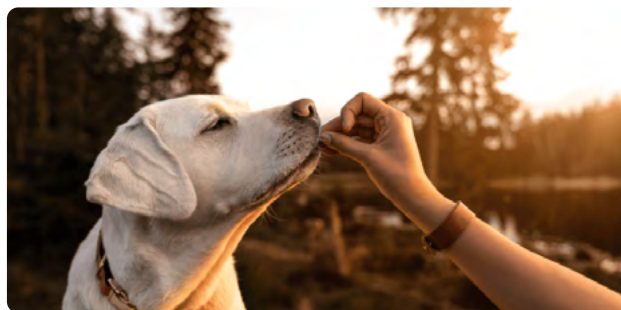
The first announcement of a takeover bid for Zooplus came from Hellman & Friedman. The private equity firm offered €3 (\$2.5) billion for the online retailer. Subsequently, Swedish investor EQT confirmed to Reuters that they are also discussing a takeover bid with Zooplus. Days later, Bloomberg reported that the New York-based buyout firm KKR is considering a counteroffer. So where is this all going? Who will end up taking over Zooplus?



Less than half of dog owners convinced they feed their dog properly

A survey by Purina's Just Right brand digs into the shopping habits of pet food consumers and their knowledge of the nutritional needs of their dog. What it found, is that dog owners are typically uncertain that they are feeding their dog correctly, and that their interest in 'personalisation,' varies by age group.

Dog owners indicated the most important factors in selecting their pet's food: quality of ingredients (66%) and the dog's preference (90%). Overall, younger generations (aged 18-24) are three times more likely to care about personalisation than older generations (aged 35-54). 54% of Gen Z, the 18-24 year olds, say that personalised dog food means 'quality ingredients', whereas millennials (25-34 year olds) say it means 'better for my dog'.



NXMH acquires Whitebridge Pet Brands

Belgium-based investment firm NXMH has acquired the maker of Tiki Pets, Dogswell, Crazy Dog and Grizzly for an undisclosed amount. Whitebridge Pet Brands, led by CEO Olivier Amice, was founded in January 2015 with the merger of leading pet treat manufacturer Cloud Star and Petropics, maker of Tiki Cat and Tiki Dog pet foods. In April 2017, Whitebridge Pet Brands acquired Dogswell, a leading brand of functional jerky for dogs. In January 2020, the company acquired Cardinal Pet Care, maker of Pet Botanics and Crazy Dog training treats. And in March 2021, Whitebridge Pet Brands completed the acquisition of Grizzly Pet Products, a leader in pet supplements.

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Pet industry highlights



Petco announces record revenue and appointment of new CFO

In the second quarter of 2021, Petco delivered net revenue of \$1.4 (€1.2) billion, up 19% on the same period last year. Net income improved by \$67.7 (€57.4) million last year to \$75.1 (€63.7) million or

\$0.28 (€0.24) per share. Trailing twelve-month net income improved by \$139 (€118) million from last year to \$79.9 (€67.8) million.

In its second quarter, the retailer added one million net new customers. Its digital revenue grew by 14%, while its services and veterinary revenue grew by 49%.

After serving as Petco's Senior Vice President of Finance, Brian LaRose now steps up as the company's CFO, succeeding Mike Nuzzo.

Jollies pet shop to open twenty new stores after demand surges

The retailer is about to accelerate its growth by opening new stores, as well as acquiring smaller retailers. Jollies currently has 67 stores across the UK and saw a revenue boost of 21% in the last three months, compared to the same quarter two years earlier. In the year to May, revenue improved 13% to £77 (€89.6 / \$106) million, and the company has reportedly increased sales of food and accessories.



Brazilian pet retailer Petz to buy accessories company

Petz, the pet shop chain from Brazil with more than 140 stores continues its expansion by acquiring US company Zee.Dog for \$163.3 (€138.5) million. Founded in 2011, Zee.Dog has distribution in more than forty countries and warehouses in the US and the Netherlands (to serve Europe). Its trendy, premium accessories for cats and dogs are also heavily marketed through its website and mobile app (Zee.Now).

PPF acquires Polish pet food manufacturer Mispol

Partner in Pet Food (PPF), the European pet food manufacturer, has announced that it has reached an agreement to buy Mispol S.A. The Mispol Group, established in 1997 in Białystok, Poland, has a long history of producing high-quality pet food for Polish and international customers.

This transaction follows PPF's acquisition of Doggy, a leading Swedish pet food manufacturer, in September 2020, and the acquisition of Landini Giuntini in Italy, in January 2021.







Food and ingredients

Plant-based pet foods is a surging sector. We bring you the latest from the leading edge of innovation, highlight some of the issues with plant proteins, and natural and functional ingredients generally, and examine the potential of natural antimicrobials. Plus, some insights into combating food fraud and proper nutrition for puppies.

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Meeting consumer demand for more plant-based pet foods

Plant-based – and even vegan – dog and cat foods are increasingly popular with consumers. So how to respond to this growing trend?

What the research says

Plant proteins have been well studied in recent research, which shows these ingredients may even come with some benefits for carnivorous companions – as long as diets are formulated and processed carefully.

Studies of plant-based proteins in pet diets over the past two years have pointed to generally favourable results. Diets containing high concentrations of legume and yeast-based proteins performed well in dogs, according to a study published this June in the journal *Frontiers in Veterinary Science*. The study found that high-plant diets may support gut health in addition to providing readily digestible proteins. In another study, increased inclusion of concentrated plant-based proteins in the diet of cats – which are obligate carnivores – actually improved their ability to digest proteins.

Pick your protein

But as with anything, plant-based pet diets do come with some caveats, as some ingredients are not as readily digested as others. According to Maria Regina Cattai de Godoy, an associate professor in the companion animal comparative nutrition lab at the University of Illinois at Urbana-Champaign, a series of studies from her laboratory showed that while pets might struggle to absorb amino acids from dark-roast peanut flour and soy flakes, a variety of plant proteins were equal or even superior to animal-based proteins with respect to the availability of amino acids, including options such as corn gluten meal, yellow peas and green lentils, and a variety of beans.

Nutrients, not ingredients

However, it is not the ingredient itself that should be singled out for praise or blame, Cattai de Godoy says.



“It is very important to understand that an ingredient will rarely provide a single source of nutrients and, in the process of creating complete and balanced diets for pets, we need to use combinations of ingredients of complementary nutrient profiles to achieve that,” she says. “Animals (like humans) do not have a requirement for ingredients, but rather for nutrients.”

Pitfalls

Two primary pitfalls can make plant-based proteins more difficult to digest when included in pet diets, according to Gary Davenport, companion animal technical manager at ADM: the total fibre content and the presence of antinutritional factors.

Fibre is not broken down in the digestive process and absorbs water, potentially trapping nutrients. Antinutritional factors are somewhat situation-specific – for example, soybeans contain a trypsin inhibitor, which prevents a key digestive enzyme from working properly.

Handle with care

Fortunately, there are a number of viable workarounds, Davenport says. Simply choosing an alternative plant protein that is more easily digestible, such as peas, is one option – though he notes each ingredient comes with pros and cons. Peas are lacking in methionine, which is essential to healthy metabolism, so a pea-based diet would require some supplementary source of this amino acid.

Alternatively, the addition of enzymes to the diet may help break down fibre and antinutritional properties. However, Davenport notes this may only be effective in raw diets since the application of heat disrupts the activity of most enzymes and studies have been hard-pressed to find evidence of enzymatic activity in finished diets.

“Sometimes you will see foods that are marketed with enzymes,” Davenport says. “But if that is a product that has been heated in some way, I would be sceptical if there is that much enzymatic activity.” Heat itself might be the most straightforward way to render plant proteins more digestible to cats and dogs, he explains. Heat and steam can inactivate a variety of antinutritional compounds, including trypsin inhibitors, and help to break down fibre.

Over-processing of some ingredients, as with the dark-roast peanut flour, may decrease the digestibility of proteins contained in those ingredients, Cattai de Godoy cautions, so it is important to treat each situation on a case-by-case basis. But on the whole, says Davenport, there is no need to worry about introducing a few more vegetables into pets’ diets. ♦



Emma Penrod
Business and science journalist

Mega health trends in pet food



Post-COVID, consumers' interest in personal health has never been higher and we know they overlay their own health concerns onto their pet's health. What does this mean for health trends in the pet food industry?

Immune function

Because of its ability to impact multiple body systems, enhancing immune function remains high in consumers' minds for their pets. Identifying unique ingredients to achieve healthy immune function is key to distinguishing one's brand. One set of ingredients to consider is antioxidants that can blunt an inflammation response. Microbiome ingredients (for example, prebiotics, probiotics, and postbiotics) can also be used to enhance immune function.

Digestion

Digestive wellness continues to drive product innovation due to high consumer awareness and interest. While probiotics are frequently used to support digestive claims, some reports suggest that probiotic use in human foods may be slowing. But room still exists in pet foods to apply probiotic innovation. Ingredient suppliers' increased marketing of postbiotics is driving greater attention to these GI-enhancing substances. While prebiotics are often

added at trivial levels to enhance the label image, brands keen to improve the health of pets have an opportunity to increase prebiotics to functional levels.

All natural

Rare is the brand today that does not carry a natural claim. That said, responsible manufacturers specify natural 'with added vitamins and minerals' due to the non-natural origin of some of these minor ingredients. This 'natural' caveat has created an opportunity for creative companies to market foods with no added synthetic vitamins. Removing vitamins and minerals from products may appeal to some consumers but hopefully those marketing such products will perform testing to ensure pet health.

Sustainability

The global trend of seeking sustainably sourced products has likewise impacted pet food products. In pet food, protein sources are the most marketed sustainable ingredient. Given the pressure on protein

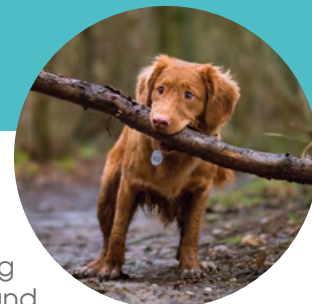


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supply, thankfully the number of sustainable protein sources continues to grow. Threats to sustainability loom, however. For example, sustainably sourced plant proteins have come under assault due to a purported association between legumes (that is, peas and lentils) and dilated cardiomyopathy in dogs. Improved scientific rigour and deliberation are warranted before making claims that prematurely tarnish otherwise healthy, sustainable protein alternatives.

Human-like foods

Finally, several manufacturers and brands have attempted to capture growing health trends by offering alternative product forms. Groups have marketed more human-like foods for pets believing they will be perceived by consumers to impart greater health benefits. Chief among these newer product formats is refrigerated pet foods. The more lightly processed cooking process results in food products that are stored refrigerated until use. Alternatives such as freeze-dried, air-dried and baked product formats are stable at ambient shelf conditions and aid in creating further product differentiation.

Pet products have and will continue to be influenced by human food trends. Responsibly made pet products that prioritise the health of the pet and meet other consumer needs, such as sustainability and desired product formats, will foster further innovation in the dynamic pet food marketplace. ♦



Gregory D. Sunvold, PhD
Cool Springs International
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Using pet food as medicine

What are the issues surrounding developing, marketing and registering functional ingredients and specific diet formulations in pet food?

What is functional?

Functional feed ingredients and specialist formulations have been increasingly used in the pet food sector for the past twenty years. This is in response to a need, fuelled by consumers and retailers, for a more 'natural' basis for maintaining health and avoiding disease in our pets.

There is no doubt that correct feeding is essential for maintaining good health in all animals. However, can we define pet foods and supplements as 'medicine' in the modern world? That's a tricky one – especially for product registration around the world. For complete diets, formulating to address specific problems, such as obesity, is typically well accepted as it is generally based on diluting caloric supply. However, diets claiming to assist with arthritis, liver disease, pain control, neurological support, anti-anxiety, skin and gut health can be a different proposition.

A grey area

Increasingly, functional feed ingredients and specialist diets fall into a grey area, whereby they may not always be restricted to nutrient supply function, creating some issues in their definition and regulation in certain countries. Some regions have zootechnical categories to cover this but not all, so care is needed when

developing products to ensure registration is possible. It is common for consumers to consider 'natural ingredients' to be essentially safe, but this is not necessarily the case. Many powerful drugs were originally derived from plant extracts. And while there are various plant extracts with a useful, non-nutrient function that have a wealth of efficacy and safety data behind them, some do not and should be avoided.

Take care

In short, it is advisable to consider carefully what claims are being made for the inclusion of feed ingredients that go beyond basic nutrient supply and are straying into the pharmaceutical arena. Ensuring inclusion rates are correct and that any contraindications or safety aspects are considered is essential during the product development process. It is also vital to be informed on any legal implications that may arise from misuse and take care to label packaging accordingly. It may be worth engaging a regulatory specialist during the initial stages of product development to guard against any nasty surprises when you come to register the product in the chosen market. ♦



Dr Lucy Waldron
Director, LWT Animal Nutrition
lucy@animalnutrition.co.nz
animalnutrition.co.nz



Nutrition during growth in puppies

Puppies, especially those of large and giant dog breeds, are prone to the development of orthopaedic diseases during periods of rapid growth because of a lower degree of bone mineralisation. Proper nutrition is key.

Managing growth

The growth and development of the skeletal system and bone mineralisation is an important physiological process that is regulated by several hormonal factors, which are influenced by the nutrients in the diet. Moreover, diet is a major source of macronutrients that enable growth and development.

During periods of rapid growth, puppies should be fed a limited amount of energy, using a meal restricted feeding regime, based on the growth phase and energy requirements. A gradual increase in body weight is the goal during growth until tissue development is complete. It is important to note that dogs of large and giant breeds reach adult mass much later than small breeds. Therefore, appropriate follow-up of weight based on growth curve is recommended.

Excess weight and rapid growth can lead to pathologies of the skeletal system such as elbow

and hip dysplasia, or abnormalities in their position. So the goal is to achieve moderate growth to avoid undesirable consequences.

Healthy bone development

Minerals and vitamins in the diet play an important role in bone growth and development. The inorganic composition of bones, which is primarily formed from calcium and phosphate salts (hydroxyapatite), gives bones resistance to tension, compression, and bending. An imbalance in the dietary supply of calcium and phosphorus can jeopardise the mineralisation process and bone growth in puppies, and consequently lead to the development of orthopaedic diseases.

One of the most important elements that affect the physiological process of bone growth and mineralisation is calcium. Metabolism of calcium is regulated by calcitropic hormones: PTH, vitamin D, and

Food and ingredients

calcitonin, whose function is crucial in the process of bone growth and remodelling. If there is a deficiency or excess of calcium in the diet, it could lead to poor growth, changes in bone mineralisation, increased bone resorption, hyperparathyroidism, panosteitis, radius curvus syndrome, or elbow dysplasia and hip dysplasia. Due to sensitive mineral and vitamin balance and a small margin for error, supplements in puppies are not recommended and are in fact contraindicated, if the complete and balanced diet is fed.

Vitamin D

The endocrine function of vitamin D also plays an important role in calcium and phosphorus homeostasis influencing the absorption of these minerals in the gut. As the production of vitamin D in the skin is negligible, diet is considered the only source

of vitamin D for dogs. Therefore, adequate intake of calcium, phosphorus, and vitamin D through food, significantly contributes to proper bone mineralisation and healthy bone development of growing dogs.

One of the key points in feeding dogs during growth and development is to ensure an adequate supply of all essential nutrients, according to the needs of the individual dog, in order to ensure the prevention of bone mineralisation disorders due to rapid growth and excessive fat accumulation. ♦



Dr Diana Brozić

Assistant professor at the University of Zagreb
diana.brozic@vef.hr



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With increased consumer concern about synthetic additives in food, natural antimicrobials are gaining more ground in the industry.

Overlooked and underused

Bio-preservatives are antimicrobial compounds from plants, animals, and microorganisms that inhibit microorganism growth and enhance food's microbial durability and quality during storage. Although non-toxic, safe (GRAS), biocompatible, and degradable, they are still vastly overlooked and underused. Some of the reasons are price, stability, and negative impact on organoleptic properties. However, innovative solutions like encapsulation in nanovesicles improve natural compounds' efficacy and organoleptic properties. Combining novel technologies with traditionally used natural compounds is leading to their re-discovery.

Plant-based

Plant-derived products have been used in medicine and food preservation since ancient times. Well-known spices and herbs extracts, like clove, oregano and cinnamon and essential oils of garlic, rosemary and thyme, prevent oxidative spoilage. The antimicrobial efficacy of these products is attributed to synergism with numerous plant secondary metabolites used by plants as protective agents against pathogens. The content of these compounds in extracts and oils will depend on many things: from geographical and climate factors to extraction technologies and solvents used. The advance of technology has led to more efficient extracts and formulations appropriate for industrial application.

From animals

Animal-derived antimicrobial proteins are purified from the sources or produced recombinantly. The

main source of antimicrobial enzymes like lysozyme, lactoperoxidase, and lactoferrin is milk. Chitosan is a linear complex carbohydrate made from chitin, the principal constituent in the external skeleton of arthropods and the cell walls of fungi. It has antimicrobial activity itself, but this biodegradable polymer is used to encapsulate and enhance the properties of many other antimicrobials.

Renewed potential

Microbes have always been the primary source of antibiotics, as bacteria produce them to fight against the other bacteria, their competition for nutrients. Of course, traditional antibiotics used in medicine are not approved for use in food preservation, but some microbial products, such as bacteriocins, are acceptable and useful. Even the whole microorganisms, lactic acid bacteria or yeasts, compete with pathogenic bacteria and thus, prevent their growth.

Antimicrobial ingredients from plant, animal, and microbial sources are re-discovered and innovated constantly. With the progress of modern extraction, delivery, and encapsulation technologies, they will be used not just to improve our medicines but also to improve our food. ♦



Jelena Šuran, DVM, PhD

Associate Professor, Department of Pharmacology and Toxicology Faculty of Veterinary Medicine University of Zagreb, Croatia
Jelena.suran@vef.hr



A new paradigm for pet food

Innovation in the pet food industry is surging since the pandemic, especially in the thriving sector of plant-based pet foods. Where is it headed?

Drivers of change

Driven by the same health and environmental concerns as human food trends, vegan pet foods are experiencing a 30% CAGR, while 'plant-based' pet foods experienced 40% growth from 2016 to 2020, according to Innova Data presented in a petfood industry webinar in September 2021.

Andrew Knight, a veterinary Professor of Animal Welfare, and Damien Clarkson, co-founder of food-technology start-up The Pack, both highlight the increased 'humanisation' and importance of pets, as factors leading owners to seek high-quality pet foods. "Pet parents are increasingly looking at how they can give their pets the fullest lives possible and prevent them from developing chronic health-related problems," says Clarkson.

With almost half of all cats and dogs having diet-related issues like obesity, health-related issues

are indeed a concern, says Michiel van Deursen, Founder of Capital V. But he points out that pet owners are increasingly also realising the environmental cost of their pets' meaty diets. "If America's dogs and cats were their own country, their meat consumption would rank fifth in the world," says Van Deursen.

A surge in start-ups

But why this sudden boom in the trend towards healthier, more sustainable foods? Rich Kelleman, Founder and CEO of Bond Pet Food, believes the pandemic has increased awareness of food sourcing and production challenges – including farm-animal welfare, food safety, animal flus and COVID-19 disruptions – and made the public more engaged.

"This has laid the foundation for a host of start-ups reimagining food and nutrition, and professional capital interested in supporting them," he says.

Knight agrees. He has seen a ten-fold increase in companies wanting to launch new brands in the sector and predicts a great deal of money will be made there in the coming years.

Premium over price

So how can brands succeed in this new era? While Clarkson believes health is the number one priority for pet owners, he also thinks it is important that “the next generation of plant-based pet food really focuses on palatability and enjoyment for the pet.” Knight says recent surveys show the most important factors for owners buying pet food are health, diet quality, nutritional soundness, palatability, and environmental impacts. “These are all more important than price,” he adds.

Educate consumers

Clarkson warns that because the conventional pet food industry is tightly wed to the meat industry, pet owners have been told dogs need meat to survive. “This certainly is not the case – they are omnivorous and can thrive on a plant-based diet.” However, he believes that as owners start sharing their experiences, attitudes will change, as they have with human food, and that, in ten years’ time, “alt-proteins for pets will be fully accepted.”

Reimagine the product experience

“It is not good enough to just throw some vegetables in a can and think you have ticked the vegan pet-owner box,” cautions Clarkson, who recommends constant innovation. His company is considering ‘a whole host of ingredients’ to make better pet foods.

Kelleman recommends thinking beyond the ingredients, “reimagining the packaging or product experience to create additional value for the pet or pet parent.”

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The future is bright

Van Deursen and Clarkson both see the plant-based food market as consumer-driven currently, meaning direct to consumer (D2C) is leading – and Clarkson says D2C is where The Pack is starting.

However, both believe more retailers will launch innovative plant-based brands in the next year, with lots of options appearing on the shelves. While plant-based start-ups are the frontrunners in the space, pet food giants are also introducing animal-free brands and options.

Alternative meat and cultured protein sources are also being explored. “Some of the new products being developed include in-vitro meat products, and diets based on other novel protein sources, including terrestrial and marine plants, insects, yeast and fungi,” Knight says. Kelleman believes that “animal proteins made through cellular agriculture and perhaps new uses of pure microbial proteins will be the most transformative.”

Clarkson too is excited about the potential of these new technologies. “Once the costs come down and the regulatory environment improves, I think you will see a huge surge in cultured and fermentation products entering the pet food market.” ♦



Stephanie Jaczniakowska-McGirr

ProVeg is an international food awareness organisation
stephanie.jaczniakowska-mcgirr@proveg.com
proveg.com



How to beat food fraud

To satisfy 21st-century pet owners' needs, the pet food market operates globally with international trade in raw materials and pet food. Sadly, the resulting supply network complexity can facilitate opportunities for economic crime like food fraud.

Types of food fraud

Food fraud is a crime that can destroy trust in safe, legal, authentic pet food supply. Criminals aim to make money through deception by exploiting supply chain vulnerabilities facilitating crime through substitution, concealment, mislabelling, grey market (production / theft / diversion), unapproved enhancement, counterfeiting, or dilution. All have occurred or have the potential to occur in the pet food supply chain.

For example, in 2007-2008, the largest ever pet food recall resulted from the use of wheat gluten deliberately adulterated with melamine for economic gain. This economically motivated adulteration resulted in the deaths of over 4,000 pets, cost over \$40 million (€34 million) in recall costs, and damaged trust in commercial pet food. In 2015–2016, counterfeit Orijen premium pet food, packed into fake packaging similar to the genuine brand, was sold in the Chinese retail sector.

Use TACCP and VACCP

Retailers must therefore be able to identify genuine product and might also ask pet food suppliers to confirm how they use Threat Analysis Critical Control Points (TACCP) and Vulnerability Assessment and Critical Control Points (VACCP) controls to reduce food fraud risks.

Internally focused, TACCP is a covert process looking at products, premises, and people for vulnerabilities where deliberate acts could affect the authenticity, safety, or legality of your products. Potential examples include disgruntled employees who deliberately contaminate product, sell confidential information to competitors, or commit cybercrime with threats to extort money. By comparison, VACCP looks for external supply chain weaknesses where food crime could occur, such as a complex network of distributors and warehouses with opportunities for product mislabelling.

How to prevent fraud

To prevent fraud, you need to think like a criminal and ask questions like: 'Do managers have the opportunity, incentive, and justification to purchase counterfeit pet food?' and 'Is the purchasing price from a distributor too good to be true?' Develop an anti-fraud culture across your company – for example, do you have a whistleblowing scheme? – and ask your pet food suppliers to confirm their food fraud controls and demonstrate their traceability procedures for a batch of product. It also pays to follow trends in the human food industry, to learn from others. ♦



David Primrose
Petfood Consultant, Synergy Petfood
david@synergy-petfood.com
synergy-petfood.com





Zoomark and the Italian market

The 19th international exhibition of products and accessories for pets is due to take place – in person – from 10 to 12 November in Bologna, Italy. Over 400 exhibitors from 40 countries are expected to attend Zoomark 2021. Read about this first major international pet fair to be held since the COVID-19 pandemic! And what are the characteristics of the Italian market?

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Italy, a pet lovers' country

With over 62 million pets – 8.2 million dogs and 7.9 million cats – Italy is definitely a pet lovers' country!

Pet companions during COVID-19

In Italy, almost four out of ten households have at least one pet. The Italians' favourite ones are dogs (48.8%) and cats (29.6%). But you will find many homes with both!

Because of the COVID pandemic, this number has – according to the 'Ufficio Studi Coop' Report – further increased to 3.5 million new pets being adopted this past year alone. With people spending more time at home and alone, pets are welcome companions to pass the time with.

E-commerce still on the rise

The pandemic has also influenced the purchasing habits of Italian pet parents: online channels note a double-digit growth since 2018. Sales reached a peak of +220% in March 2020, compared to the same month of the previous year.

During the lockdown, many Italians discovered the ease of online purchasing. Born out of necessity – because non-essential shops were closed – online shopping has remained a much-favoured channel since.

In a recent survey of Italian pet owners, 45% indicated having to buy products online for their pet during the COVID-19 lockdown. 79% stated to have purchased online at least once during the past year and 53% bought most of all their pet products online in the same period.

Currently, 52% of Italians buy pet products online at least once a month. Amazon and Zooplus are Italian pet parents' favourite e-retailers: with Amazon being preferred by dog owners, and cat owners favouring Zooplus. Certain product categories are particularly popular online: pet food (good for 72% of sales), and toys (36%).

Stone and mortar sales

Despite the significant growth of online sales, high street retail still has an important place in the Italian pet market.

In 2020, the Italian pet food market grew by 4.2% compared to 2019. The year showed a turnover of over €2 billion (\$2.36 billion) in the main distribution channels: grocery, traditional pet shops and pet superstores. Sales volumes also increased by 2%. (Source: 2021 Assalco-Zoomark Report.)

Cat food is the fastest-growing category in pet food, increasing by 5.9%. The segment which showed the biggest increase in 2020 is healthcare & hygiene: products like shampoos and other grooming items, training pads, pet wipes, brushes, et cetera. This segment grew by an astounding 14.7% in the grocery channel.

Such figures do not include the €34.3 million (\$40.55 million) in turnover generated by a typical Italian distribution channel: specialised pet stores owned by grocery chains. These include Amici di Casa Coop or Conad Pet Store (Coop and Conad being two of the leading grocery chains in Italy).

These specialised stores are characterised by their broad product assortment, focus on the premium segment and in-store services. Such services typically include dog grooming, a vet corner, insurance, training services and more.

This peculiar format is expected to develop further, with new openings in the short/medium-term and increasing orientation to customer experience, with the aim to attract new clients and build (their) loyalty. Private label sales are also expected to benefit from this emerging channel, both in terms of revenues and further premiumisation.

Interest in sustainability

In a recent survey (Permanent Pet Watch, *Pet owners and Sustainability Survey*, September 2020 and February 2021) Italian pet owners indicated that they were more conscious about sustainability issues. Especially the under 30s are concerned about the environmental impact of society as a whole.

As for pet food, the survey showed that Italian pet owners have three main concerns:

- respect for ethical principles by pet food manufacturers
- sustainable packaging
- sourcing of sustainable raw materials

When purchasing pet food, Italian pet owners indicate that they are willing to purchase another brand than their usual one, if the other brand is perceived as more sustainable. They are also willing to pay more for a sustainable choice.

The shift to buying sustainable pet products could be an interesting opportunity for pet food manufacturers. It could be worthwhile to develop a brand proposition and strategy that sets out and applies eco-sustainable company values. Such a strategy can help anticipate and meet new trends in pet parents' needs: boosting their trust and long-term brand loyalty and justifying their willingness to spend more. ♦



Rita Buffagni
Communications Manager, Mediatic snc
media@mediatic.it
mediatic.it



Lavinia Fressura
Account Manager, Mediatic snc
media@mediatic.it
mediatic.it

Record numbers of exhibitors for the first 'live' international pet industry event in Europe



The 19th Zoomark International expo, due to be held 10 to 12 November at BolognaFiere (Bologna, Italy), is a new milestone for the event.

Post-COVID pet world

The COVID-19 pandemic has impacted both consumer habits, as well as the worldwide economy. As the doors are about to open at the 19th Zoomark International expo, more than twice the number of anticipated exhibitors (taking up twice the exhibition space) have already registered. More than 400 exhibitors from 40 countries (and still counting) will be presenting their products live, after more than 18 months of online only.

New trends, new format

The industry trade show, the only international one to be held in person in Europe in 2021, heralds a new approach to connecting and networking. The 'phygital' formula combines a return to the in-person interaction, with advanced, digital solutions that have become part of everyday life.

The fair's layout, which had to be extended to host all exhibitors, now covers halls 25, 26, 29 and 30 of the Bologna exhibition centre. Apart from being able to host more exhibitors, the larger expo area will enable visitor routing for safe distancing.

In this way, more visitors can be welcomed in full compliance with health regulations. Two separate entrances to the venue – Piazza Costituzione and the

North Entrance – will also ensure a proper and safe spread of visitors to the expo.

The traditional showcase area for Zoomark International comprises the new products area. The area has been fully revamped, to even better show off the latest in products, trends, lifestyle, and pets as valued family members.

In-depth pet health and care

The Assalco-Zoomark Report is the main topic of the opening conference. In addition, pet health and pet care are the special focus of four events – a conference and three seminars – during the expo this year. Organised in close collaboration with ANMVI, the Italian National Association of Veterinarians, these events will highlight animal nutrition. Last, but not least, changing trends in pet care in the diversified Western European market will be the focus of a conference organised in collaboration with Euromonitor.

A digital preview will be available from 3 to 9 November, via a platform that is also a valuable business network. The platform can be used by exhibitors and visitors to meet and schedule appointments during the duration of the fair. ♦



PEOPLE AND PACK

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Constantly investing in new technology, IPV Pack offers packaging solutions that make the difference for their clients.

Quality as driver

In 2018, founder Simone Palma decided to dedicate his many years of experience in the world of packaging to a new company: IPV Pack. The company now is leading in Italy and Europe for processing high-quality plastic packaging materials for the food, pet food and industrial sectors.

Customer first

The company's corporate payoff is 'People and Pack'. It underlines their belief that the human factor is the most important technology to invest in. It is the people at IPV who bring their unique experience and skills to enable a truly customer-oriented mindset that ensures the right synergy at every production stage: from project design to the production of finished materials. In fact, continuous support, creativity, customised solutions and speed-to-market are the keywords in IPV's strategy.

Innovative products

The company produces one of the most innovative packaging bags on the market: the Flat Bottom bag. The bags have a seam in all four corners, making a completely flat bottom – with rounded corners – that offers extra stability. In other words, the bag 'stands up' on its own, maximising visibility on the shelf in both vertical and horizontal positions: a very important competitive advantage in the pet food industry.

Doubling their production capacity of the Pinch Bottom and with a new Doy Pack line, the company now has a complete product range that meets all market demands.

Quality means excellence

The company's specialised staff carries out analytical checks at every stage in the process in a modern in-house laboratory. The laboratory is equipped with state-of-

the-art instrumentation, to exhaustively test the technical characteristics of raw and processed materials, as well as finished products.

IPV Pack is ISO 9001:2015 certified. This is an important international acknowledgement that underlines the high-quality level of their packaging solutions. They also hold two BRC certifications: the *BRC Global Standard Voluntary Module Traded Goods* and the *BRC certification for Global Standard for Packaging and Packaging Materials*.

These certifications mean the company can fully meet the needs of international customers. The certifications provide recognition of their responsible approach to quality and safety. ♦

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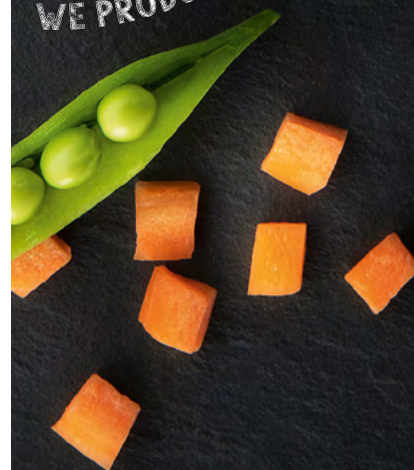


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Investing in research

“As a family business, our strategy is closely linked with the story and identity of the Gambarelli family,” says Enzo Gambarelli, founder and owner at Mister Pet. “The family comes from what is known as the Italian Food Valley. Here we established a production facility in line with our vision: to support the well-being of pets. Over 40 years of in-depth know-how of raw ingredients, farms, slaughterhouses and production plants has enabled us to achieve this goal.”

The company continues to invest in ongoing research on how to best treat and process ingredients. Initial cooking using steam is key to maintaining the highest nutritional value. The focus is to guarantee taste and digestibility, as well as a high measure of bio-based nourishing substances.

Unique characteristics

In addition to processing raw materials in its own pet food kitchen, the company

develops its own sources of omega-3 and 6, and Natural Digest, in-house. The family also invested in the search for ingredients and blends that give recipes unique characteristics, aimed at maximising the nutritional benefits of pet food. A wide variety of meat and fish products is based on such ‘family’ recipes. From fresh, frozen, through to dehydrated and hydrolysed meat and fish: everything is homemade in Mister Pet kitchens.

Prize-winning quality

The company received the *Quality Award 2021* for two of its most important brands: Primordial Grain Free and Vivere Low Grain. The awards were seen as recognition of the company’s efforts to innovate and achieve unmatched quality in pet food. Mister Pet proudly defeated the other competitors with a score of 8.4 out of 10, and a high score to buy blind (97%). In addition, Primordial received the *Vet Approved* logo.

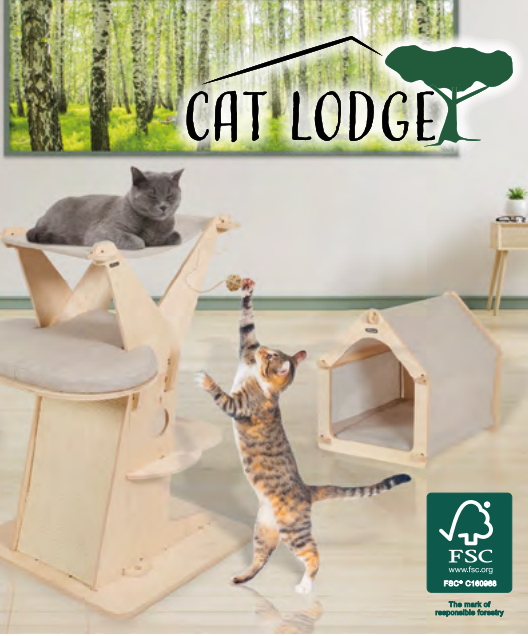
International development

Agreements have recently been signed with numerous countries, including Russia, South Africa, and Israel. The company also embarked on an important partnership with a leading company in the Chinese and Hong Kong markets, which has resulted in the founding of a distribution company: Mister Pet China Ltd.

New pet food kitchen

Soon a state-of-the-art kitchen, boasting the latest Wenger technology will be opened. This will enable the company to include even more fresh ingredients in its pet food. A new and modern laboratory and a completely automated warehouse, with a capacity of over 7,000 pallets, are also set to open soon. ♦

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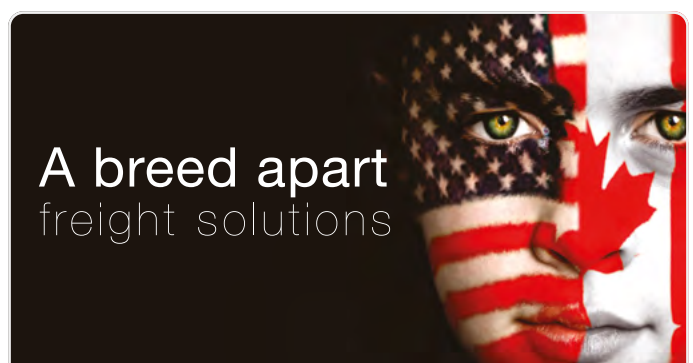
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Eastern Europe and Russia

Pet markets in the region have experienced similar – and mostly positive – effects of the pandemic: more pets and more humanisation leading to premiumisation. But that is where the similarity ends. Each market is dealing with other factors that affect pet businesses.

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Current developments in the Russian pet industry



The pet market in Russia has changed significantly in the past year. Affected by the pandemic to a certain degree, it is also feeling the effects of economic turmoil.

Pet numbers drive sales

The pet population in Russia is growing organically and the COVID lockdown has triggered further growth. In 2020, 59% of Russian households owned a cat or dog. There has also been increased interest in keeping small mammals since the pandemic started, with 17–30% more requests seen online.

Pet populations in Russia (millions)			
	Total (cats & dogs)	Cats	Dogs
2020	63.6	41	22.6
Compared to 2017	+12.1 mln	+8.1 mln	+4 mln
©Mars Inc.	+23%	+25%	+21%

A new lifestyle – staying at home, remote working, lack of usual leisure activities – has boosted pet spending. Total retail sales increased by more than 6% in Russian roubles in 2020 compared to 2019. The market structure is unchanged – 79% food and 21% non-food products in value.

Russian pet market	\$ billion	€ billion
Pet care	3.12	2.64
Pet food	2.58	2.18
Pet products	0.54	0.46
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Market transformations due to COVID-19

Russian consumers' shopping habits have changed. According to retailers, pet owners are switching to larger package sizes. During lockdowns, it was handy to have food and litter stocks at home.

The physical and mental health of both pet parents and their pets is a high priority. Veterinary diet sales increased by 14% in 2020 (source: Royal Canin). The premium pet food category has also shown higher growth rates than the basic category (source: Lenta retailer).

Consumers like to be able to shop anywhere, anytime. This trend has led to pet speciality retailers and

Eastern Europe and Russia

supermarkets in Russia developing omnichannel retail strategies. Another effect is that all pet products suppliers have started using the kind of marketplaces that boost sales enormously in Russia.

Research shows that e-commerce grew its share in pet product sales from 7 to 8.2%, but major industry players say this figure is even higher, up to 12%.

Distribution channels (%)	2019	2020
Grocery retailers	55.4	56.4
Pet specialists	36.4	34.3
E-commerce	7.0	8.2
Veterinary clinics	1.2	1.1

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The economic recession in Russia caused by COVID-19 restrictions has led to uncertainty and the consumer mindset being reshaped. People are now trying to make savings, focusing on the best price – or a better one – for the same quality. The effect is a growing share of discount sales, with 70% of cat food and 58% of all pet products now sold at a discount.

Industry responses

In industry responses, three trends can be seen:

Private label growth. While brands are busy promoting price in the battle for the consumer, retailers are desperately looking for high margin products. Private labels manufactured internationally or domestically is their way to deal with decreasing margins.

Digitalisation. There has been a high level of digitalisation in Russia for years, with many services provided via e-systems and mobile apps. The start of the pandemic forced even more companies, especially retailers, to rethink their business processes in order to survive. Digitalisation is vital for their e-commerce, logistics and distribution.

New players from other industries – major online operators, national retailers and state enterprises – have entered the fast-growing, high-potential pet market.

Regulatory issues

The structure of the Russian pet market has been subject to abrupt transformation. This is due to Russian regulatory policy, rather than the result of the pandemic.

Since August 2020, the Federal Service for Veterinary and Phytosanitary Surveillance (Rosselkhozadzor) has suspended Russian imports of pet food, supplements and ingredients from eleven countries: the Netherlands, the US, Spain, Germany, Canada, the Czech Republic, the UK, Lithuania, Belgium, Brazil, Estonia, and some suppliers from Italy. A number of them are in the top ten of suppliers. Official reasons for this are unregistered GMO and unsatisfactory results of quality control inspection at some factories.

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The economic recession in Russia caused by COVID-19 restrictions has led to uncertainty and the consumer mindset being reshaped.

Import restrictions have led to turbulence in the Russian pet market. Whole businesses are affected. Retailers and veterinarians are experiencing shortages of premium functional pet food and diets. Pet owners are confused by brands disappearing from the shelves, with their pets at risk of health problems.

The head of Rosselkhoznadzor, Sergey Dankvert, has assured Russian pet owners that the domestic industry is able to provide all necessary products. But that is not yet the case. Domestic production has been developing fast, with many new pet food plants opening recently, but the assortment is far from sufficient.

What's next?

Consolidated efforts of industry players, media and trade associations have led to de-escalation, and in July to September 2021, Rosselkhoznadzor temporarily allowed supplies from a number of manufacturers. The veterinary authorities of those countries were requested to provide all necessary papers to confirm pet food compliance with the requirements of the Russian Federation and the EAEU, including the traceability of raw materials plus products of plant and animal origin. The three months of alleviation will be over in October. The Russian pet market is waiting to see what will happen next. ♦



Yulia Dolzhenkova
Development Director for Zooinform, Russia
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us@zooinform.ru
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Expansion of pet food markets in Ukraine and Belarus



Sales of pet food have risen during the pandemic in both Ukraine and Belarus. As elsewhere, people here have been adopting pets to endure lockdowns – and have fed them well too.

Ukrainian trends

"During the lockdown, the number of pets here increased significantly," says Ihor Blystiv, GCMO of Ukraine's largest pet food producer Kormotech, adding that this is in line with the global trend of rising demand for four-legged pets. "In the first six months of 2021, the Ukrainian market showed 14.5% growth in volume and 24% in value compared to the same period in 2020. For our company, business this year grew by 25.1% in volume and 43.7% in value compared to the same period last year."

The growth in monetary terms appears to be stronger due to rising average prices for pet food. In addition, Ukrainians are increasingly opting for more expensive pet food, and the COVID-19 pandemic has accelerated this trend.

Going premium

"There are approximately 2.5 million dogs and 7.5 million cats in Ukraine," says the country's analytical

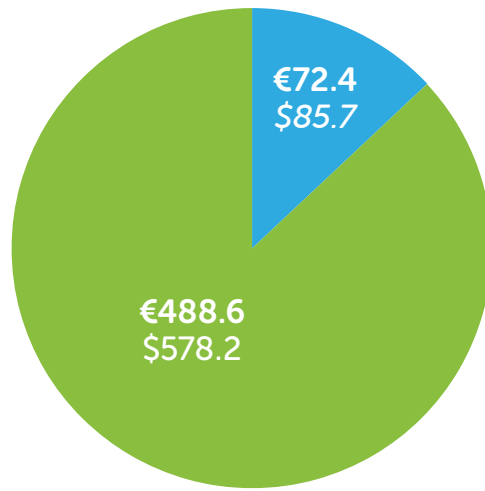
agency Ukraine-Invest. "In 2001-2002, the economy pet food segment accounted for an 80% market share, while premium and super-premium had 15% and 5% shares respectively. Today, things have changed dramatically, with the premium and super-premium segments now jointly accounting for a 45% share of the market," Ukraine-Invest adds. Officially, overall annual sales of pet food for carnivorous diets in Ukraine stand at 100,000 tonnes or \$300 million (€254 million). But unofficially, sales are believed to be around 250,000 tonnes per year, according to Ukraine-Invest.

Eastern European leader in e-commerce

In 2020, Ukraine's overall e-commerce sales jumped 41% to \$3.97 billion (€3.36 billion) – the strongest rise in an Eastern European country, according to research conducted by Soul Partners, Baker Tilly Ukraine and Aequo. Ukrainians have also begun to buy more pet food online. Pet food sales in the online channel nearly doubled last year.



Pet care market sizes in Ukraine in 2020 (mln)



■ Pet food
■ Pet products

Source: Euromonitor International

"COVID-19 definitely spurred e-commerce in Ukraine," Blystiv says, adding that the increase in domestic sales still lags behind the growth in export for Kormotech. "Sales in Ukraine increased by more than a third, and exports almost doubled. During the pandemic, we were able to sign contracts with Spain, Malta, Italy, Norway, Jordan, and Germany," he adds.

Ups and downs in Belarus

Belarus has been experiencing quite similar trends, but the country was impacted by its continuing political turbulence. During the past two years, the EU and the US imposed several rounds of sectoral sanctions against Belarus. While not hitting pet food supplies directly, they raised a lot of concerns among pet owners.

"Despite the economic sanctions, foreign pet food brands are still available in the country," says a source in the market who does not wish to be named. "But in October 2020 and July 2021, there were a lot of fears that some pet food might be subjected to sanctions one

way or another – either by our government or by other countries – and customers were rushing to stock up."

Belarus imports almost all its pet food from the EU. The economic sanctions caused a slump in the Belarusian ruble's exchange rate against the euro, driving up the prices for all imported brands. "Despite that, overall sales did increase during the past year, at least in Minsk, but only slightly," the source adds.

Pressure groups

Foreign businesses are experiencing other pressure in Belarus too. Just recently, Nestlé was urged by human rights campaigners to stop its advertising, including ads for its Purina brand, on Belarusian state TV channels, which allegedly supported state propaganda and the violation of human rights during recent protests. ♦



Vladislav Vorotnikov
Pet industry journalist



Has the whole Hungarian market benefitted from growth during the pandemic?

The pet product market in Hungary has been thriving since the first wave of lockdowns, with overall growth in the past year reaching nearly 17%. But not all channels have contributed equally.

Online specialists gain ground

The specialist channel has outgrown all other channels in Hungary by far, particularly their e-commerce business. Fressnapf still dominates the market. With their marketing power and high brand awareness, their online store quickly became the third largest in Hungary.

Small local specialist chains, and some independent stores, have also managed to generate significant sales growth. But a large part of the independent channel has had difficulty keeping up with both online and larger retailers with better locations and more appealing assortments.

Bigger stores lose out

The supermarket channel had an advantage over most other store categories, as it was less affected by pandemic measures regarding opening times. Yet it still failed to equal the growth in pet specialist retail.

Discounters have a strong position in dog and cat food. Failing to keep up with developments in the market has however led to their share dropping significantly, especially in dog food. Hypermarkets have managed to slow down the decline in their market position, but have not seen any growth since early 2020.

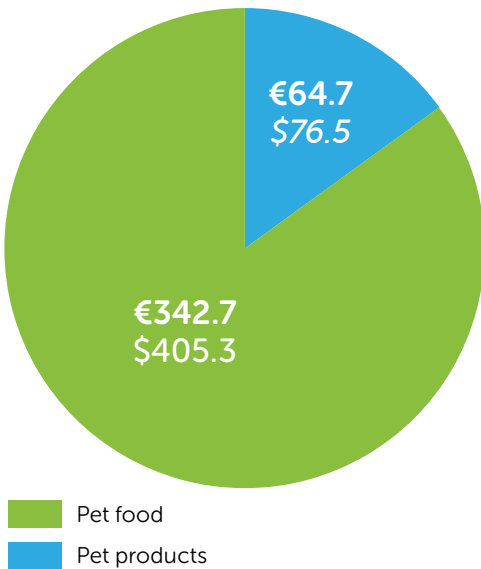
New pet parents

During the first and second waves of the pandemic, there were significant increases in the numbers of new puppies and kittens in Hungary compared to many years pre-COVID.

The new pet parents did all they can to provide their pets with high-quality food and accessories. So they immediately went for the super-premium categories, creating both volume and value growth in the market. They made their first pet supply purchases at specialist online and brick-and-mortar stores, mainly Fressnapf.

Eastern Europe and Russia

Pet care market sizes in Hungary in 2020 (mln)



Source: Euromonitor International

Explosive growth in pandemic-led categories

Besides the spike in the number of pets, the need and demand for pet accessories have also greatly increased due to people spending much more time in their homes. Products like beds, travelling gear, cat trees and other activity items have seen enormous growth. This phenomenon has also contributed to the increased sales in specialist stores, where pet parents could find more variety than what is on sale in supermarkets.

COVID-19 has certainly shaken up the Hungarian pet products market. Even though strong growth has been seen in the sector for many years, the past eighteen months have definitely brought change. And as premiumisation continues to be the main driver of growth, the biggest winner is the specialist channel. ♦



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CEO Pe-Zo Ltd
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Global pet industry

In the run-up to GlobalPETS Forum next January, read about ongoing topics like omnichannel integration and how general trends affect the pet consumer. But also: interest in more exotic pets is growing fast. So the industry needs to be increasingly aware of welfare and regulation for this particular sector.

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New market opportunities as the number of 'other' pets is on the increase

As in the overall pet market, the COVID-19 pandemic has had a huge, beneficial influence on the US market for the 'niche' fish, small mammal, herptile, and bird products markets. Actual sales and demand have risen to historically high levels.

Not just dogs and cats

Of the US households that took pets in the twelve-month period ending February 2021, 31% took pets other than dogs or cats. This is a disproportionately high number, given that such 'other' pets were kept by only 20% of pet-owning households two years earlier, in 2019.

Currently, 12.2% of US households have pets other than dogs and cats, which adds up to a total of 16 million households. This surge in the pet population has led to a corresponding sales increase in the US 'other' pet products market: with sales up by 18.5% to no less than €2.37 billion (\$2.8 billion).

Pet supplies

For many types of durable pet supplies, replacement or upgrading is discretionary and relatively infrequent,

often simply due to inertia of the pet owner. But a new pet means the purchase of a broad selection of new pet products, including enclosures (aquariums, habitats, cages, and accompanying accessories), as well as pet feeding and watering accessories and toys. Most, if not all, of the 'other' pets acquired during the pandemic, required pet parents to spend on products for their new companions. New pets also fuel demand for non-durable supplies such as food and hay bedding.

Education-first approach

It is to be expected, that these newly acquired pets will continue to drive sales, for as long as the owners keep the pets. With between 8% and 17% of 'other' pet owners indicating that they are 'beginners' when it comes to their level of experience caring for their



pets, providing tools to educate them on how to be a good pet parent could be an attractive market opportunity.

In fact, looking ahead, marketers and retailers are well-advised to take on an active role in encouraging 'other' pet owners to learn how to care for their new pets. Doing so will not only promote pet health and safety, but foster the bonding between the owner and his pet. In this way, it is more likely that pets will be allowed to stay in their new homes once life returns to normal post-pandemic, and parents go back to work and children to school.

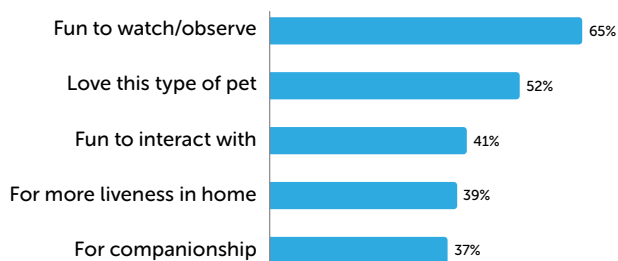
Multi-pet households

During the pandemic, 'other' pets became especially popular as new members of the family among households that already had a dog or cat. Such 'multiple pet' households (which includes having multiple types of pets and/or multiple pets of a certain type) are especially attractive for the pet industry. After all, pet ownership is a cost incurring and highly discretionary expense.

Households that can afford to add pets during a global health crisis are likely to be relatively secure regarding their income.

One of the main reasons people get pets other than dogs or cats, is for the enjoyment of watching and interacting with them. Results from a recent survey by Packaged Facts shows that nearly two-thirds of owners of 'other' pets (65%) enjoy keeping these pets because they are fun to watch and observe. Over half (52%) simply love that specific type of pet. Other common motivations include that these pets are fun to interact with, bring liveliness into the home, and provide companionship. ♦

Top five reasons for ownership of pets other than dogs/cats, February 2021 (percent)



Note: Percentages do not add up to 100% due to multiple responses.

Source: Packaged Facts. Small Mammals, Herptiles, and Fish: US Pet Market Trends and Opportunities (August 2021)



David Sprinkle
Research Director & Publisher
dsprinkle@marketresearch.com
marketresearch.com

Positive pet industry interventions for the exotic pet trade

When talking about pet ownership, we often focus on dogs and cats, but the worldwide market for exotic pets is huge and growing.

Exotic pets – gaining ground

'Exotic' usually means pets without a long history of domestication, including birds, reptiles and amphibians, ferrets, rodents, and rabbits.

Exotic pet ownership is geographically widespread, with birds and fishes forming the highest percentage of ownership (almost one-third) in Indonesia. In the US, approximately 50% of pets are exotics (APPA 2018). In Asia and South America, the market is also expanding rapidly because of improved living standards. Overall, ownership of reptiles and amphibians has more than doubled in the past twenty years.

Impacting biodiversity

Whereas some people keep exotic pets as a positive effort to maintain rare species, the downside of keeping exotic pets is that it can have a negative effect in terms of native biodiversity. Our focus here is on the legal pet trade. Unfortunately, however, many exotics are traded illegally.

Welfare is key

Even in the legal pet trade, care of exotic animals is often below par. A 2019 study showed that snakes are often kept in too small vivariums. Retailers should stock and sell only appropriate living quarters.

Social animals such as the sugar glider need companionship and should not be sold in isolation. Chances are, that they will self-mutilate without a companion. African grey parrots will pluck out their feathers due to boredom and lack of social interaction with other parrots. On the other hand, some fish are solitary by nature. Kept with other fish they can show aggressive behaviour.

How the pet trade can help

The pet industry can support animal welfare in several ways:

Provide expert knowledge

In an RSPCA study, over 40% of exotic pet keepers said

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that the most common problems experienced were due to a lack of information from their supplier. Retail staff should be trained in the care and needs of the species sold.

Refusal to sell

An owner should demonstrate his ability and understanding of keeping an exotic animal. UK Pet retailer Pets Corner will only sell rabbits in pairs and refuses to sell ferrets or birds at all.

Husbandry focus

As an industry, we can promote welfare and suitable care. Sourcing appropriate litter, cleaning materials, along with high-quality food, or containers not just to drink, but to bathe in. Furthermore, providing climbing equipment, investigation and exploration toys helps the animal to live as naturally and happily as possible. Hides – from artificial logs or caves to full hutches – allow the pet to shelter and are a must-have for all species.

Don't keep it cheap or simple!

Even the humble rabbit or ferret has extensive and complex needs. A rabbit can incur stress from handling by small children, but can be trained to live in a robust, chew-proof home, with a litter tray.

It is time for the pet industry to be led by welfare and care: let us match the growing interest in exotic pets with our knowledge to support animal well-being. ♦



Karen Wild
Dog trainer and pet behaviourist
info@pawprintpets.com
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It all started with one pet shop...

A mix of retail and wholesale, with a focus on love and care for pets, is proving a winning combination for Edvard Varda's UNCONDITIONAL and ZOOCITY businesses in Croatia, Slovenia and Serbia.

From strength to strength

"We started as far back as 1975, when Vatroslav Varda opened one of the first pet shops in the former Yugoslavia," explains Edvard Varda. The company became involved in wholesale distribution in 1994, when it partnered with Hill's Pet Nutrition. A year later, it entered into a partnership with German company Tetra.

Further growth took place in 2006, when a subsidiary was set up in Belgrade and product distribution began to other former Yugoslavian countries. In 2011, it acquired the 25-branch ZOOCITY retail chain and has continued to grow steadily ever since. By 2017, the company had a turnover of €23 million (\$27 million).

Wholesale trading has flourished and resulted in a portfolio of over twenty specialised suppliers. In many cases, as the exclusive distributor for Croatia and Serbia – or the entire region.

"We have expanded our veterinary medicine distribution and are now the official distributor of Bayer and Zoetis. Aiming to be a market leader in frozen products too, we began distributing for UK frozen food producer Natures Menu in 2014," Varda says.

Right prices and employees

Varda: "We have doubled the company's size over the past four years. This is a combination of many small improvements and a strong focus on employees. Our promise to customers is to make pet care as easy as possible. We do that with a mix of consultative sales, a good range of products and correct pricing."

He believes business growth will continue: 35% in Slovenia, 25% in Croatia and 55% in Serbia for 2021. On the retail side, the Croatian ZOOCITY chain is expecting to be up 16%.

Regional markets

According to Varda, current total market sizes range from €145 million (\$172 million) in Croatia, €95 million (\$112 million) in Slovenia, to €65 million (\$77 million) in Serbia.

"Pet parents clearly want to nurture their pets with natural, healthy foods, supplements or treats, and intelligent toys. Slovenia is premium driven, with the well-being of people and pets very much integrated. Croatia is a few years behind, but you see the same trends. Serbia is non-EU, so has import barriers with



regard to vet products, certificates and customs tariffs," comments Varda.

"All three markets are growing by 12-16% per year and this will be sustained over the next few years. There is a great opportunity to bring volume from supermarkets, drug and cosmetic stores to the speciality trade. As consumers move upmarket, we have an opportunity to serve them with better and more specialised products to care for their pets."

New product ranges

Although more products inspired by human trends are entering the pet market, such as pet food containing goji berries or pomegranate, they are not yet popular in this region.

"Today's sweet spot is 'entry-level' natural products like grain-free, but at affordable price ranges. That is an area where we are looking to expand."

When it comes to private label, investing in own brand development would not be sensible right now, because of relatively limited volumes. Instead, Varda works with a number of 'controlled' brands similar to private labels. The company has, for example, long-standing collaborations with brands like Interquell (Happy Dog/Cat), Champion Pet Foods (Orijen/Acana) and Fressnapf for food products, plus Trixie for accessories.



Key to success

Finding the right partner with local market insights and a good network increases the likeliness of success:

"In all three countries, we distribute directly to over 1,200 pet stores and veterinary clinics. There are no sub-distributors or wholesalers. We have over twenty sales reps visiting customers and this gives a competitive edge. It is more expensive to coordinate and more complex, but does enable us to build sustainable growth and brands. That is not something you achieve with pricing or marketing communications," Varda says.

Exciting ideas

Besides building his management team and optimising some internal processes, Varda is excited about piloting new store concepts – testing format and size as well as product ranges – to fine-tune their offering and better meet the needs of their customers. ♦



Philippe Vanderhoydonck
Managing Director, PETS International
philippe@pets.nl
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The uncertain future of trade in marine ornamental fishes

Consequences for the industry could be grave unless trade actively contributes to a new process evaluating the marine ornamental fish trade.

Saving species

CITES is the Convention on International Trade in Endangered Species of Wild Fauna and Flora. It is an international agreement between governments (now 183 countries) aimed at ensuring that international trade in specimens of wild animals and plants does not threaten the survival of the species.

At the latest meeting in Geneva in August 2019, it was decided that the convention should undergo a thorough process to evaluate the trade in all species of coral reef fishes for the ornamental fish trade.

However, with a tight deadline of mid-2021, there was no room for any robust inquiries and study of the trade. The process of pre-studies, an international workshop, reporting on the findings and giving recommendations would just take too long.

Sustainable or not?

Trade associations, like the European Pet Organization (EPO), Ornamental Fish International (OFI), Ornamental Aquatic Trade Association (OATA) and the Pet Industry Joint Advisory Council (PIJAC) warned that the only way to do this in such a short time would be by relying on existing old – and often biased – literature and studies from NGOs, rather than going in any depth. This would only repeat old prejudices and misunderstandings about a trade that is increasingly being conducted in a sustainable manner.

And then COVID-19 muddled things up even more. The above-mentioned trade associations that were prepared to collect data and investigate on their own, could not travel and had limited possibilities to gather any data.

As a result, CITES understood that the initial plan to make decisions at the next meeting of the Conference of the Parties in 2022, was impossible. During the online meeting of the Animals Committee this summer, it was agreed that the whole process would be postponed for three years. Conclusions are now aimed to be reached by 2025.

The future?

What the outcome will be, largely depends on how helpful live fish trade operators will be towards the trade associations' representing them in CITES. And whether the industry at large (including food and accessory manufacturers) is willing to supply funds and other resources to make efficient investigations into the fish trade possible.

Negative findings in the process could lead to popular species becoming CITES-listed and subject to trade restrictions. This will also negatively impact the rapidly growing captive breeding industry. ♦



Svein Fosså
President European Pet Organization (EPO)
Vice President Ornamental Fish International (OFI)
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The innovative scratching tree brand

Since 2017, Petrebels has been working on designing stable, trendy cat trees around the world. The 2021-2022 collection proves once again why Petrebels' products are truly unique.

Robust and trending design

"Designing a nice cat tree is not difficult. Making a great design that is also attractive to the cat, is," according to Dennis Steenbakkers, owner of Petrebels. "This is where our strength lies. We understand the needs of cats, as well as the taste and wishes of cat owners."

New and well thought out styles, that seamlessly match current trends, make Petrebels live up to its name. Modern, contemporary and clean-cut design in combination with super-strong materials, offers exactly what a cat needs.

Using technology

At the beginning of this year, the company launched Petrebels@Home: 3D models and Augmented Reality (AR) that together create the perfect shopping experience for cat owners.

Using AR, cat parents can use their smartphone or tablet to check if their ideal Petrebels' cat tree fits in their home.

"This is Petrebels 2.0, proving that we are modern, ahead of trends, and have a great understanding of what consumers need," co-owner Detlef Windeln explains.

Market demand

The company sees a clear trend for larger and stable cat trees. It is why their product range consists mainly of medium and large size scratch trees.

Customer feedback confirms that quality and stability is what matters to the owner as well as the cat. From an industry point of view, small scratching posts are also becoming less interesting, seen in the light of this year's enormous price increase for container shipping.

The company anticipated this shift and firmly reinforced its position in the market. The warehouse capacity in the Netherlands has doubled, offering reliable delivery performance with 30 containers in stock. By responding appropriately to current supply chain issues, stocks have been at a healthy high level all year. The company currently supplies around 1,100 shops in Europe and delivers its products to 23 countries worldwide.

Design at an acceptable price is what most cat parents want. No wonder that wholesalers and retailers are knocking on the company's door for their unique scratch trees. ♦

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Top industry speakers on Thursday & Friday



Johannes Steegmann
Managing Director
Fressnapf



David Robinson
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Turn the page to discover the other speakers.

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Keeping up with the new consumer

*The theme of this year's GlobalPETS Forum:
The new consumer – can you keep up?*

Questions, questions ... and answers

Since the start of COVID-19, many emerging trends in buying behaviour and consumer preferences have accelerated. Online channels have become more popular, people have higher expectations of seamless shopping experiences, more attention is paid to concerns about sustainability and health, and brand loyalty has faded. How do we continue to appeal to this new consumer? How does our branding and

product development strategy need to evolve? How do we make it more convenient for consumers to buy? How do we best integrate online and offline? And how can we work with channel partners to be more successful together? Plus: what is our private label or DTC strategy?

Join us at the Forum in Amsterdam Beach to discover answers to these questions.

Global pet industry

Top speakers

A line-up of top speakers will help you keep up with the new consumer:



Managing Director of Fressnapf, **Johannes Steegmann**, will tell us about the retail giant's approach to the COVID crisis and describe how it has developed an ecosystem to cater to the new consumer.



David Robinson is COO of Pets at Home, the leading pet retailer in the UK. He shares his latest insights into the consumer and how Pets at Home is integrating online and offline retailing.



Pet industry and retail veteran **Bob Moran** will talk about the implications of this new consumer for the pet industry and dig into the changes that are here to stay. Bob worked for PetSmart for more than a decade and served as its CEO.



Jodi Watson takes us through the developments of online and offline pet retail channels in the US and EU, and sheds light on DTC and omnichannel strategies. She has over 20 years' experience in retail and is a former SVP at Petco.



Which trends from outside the industry will reach the pet industry soon? **Alison Angus**, Head of Lifestyles at Euromonitor International, walks us through emerging consumer megatrends and how those will translate to the pet industry.



Looking at the changing consumer with his trends model, Zeitgeist watcher **Peter Heshof** will give us insights into what is likely to come next. By using the insights from this model, you can futureproof your business for upcoming consumer changes.



With a background of helping major brands and retailers create profitable online/offline ecosystems, **Cate Trotter** (Head of Trends at Insider Trends) will explain how to use the developments in retail, DTC and omnichannel in your business.



Dr Constantinos Pantidos offers insights from his research into the consumer neuroscience we can use to build better brands. He has developed 'The wheel of motives™' to use neuromarketing in branding and shopping.



How do you effectively tell a story in your marketing to engage and trigger consumers? **Cor Hospes** is a storytelling expert and will speak about how to stay connected with consumers in this new industry landscape.



Can you bridge the gap between physically getting to know a product and buying it in an online world? Co-founder and CCO of Virtual Lab 17, **Johan Brinkman**, demonstrates how to use AR/VR to bring products closer to online consumers.

For further information: globalpets.community/gpf-2022



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The GlobalPETS Forum Award

Who will win this year's prestigious GlobalPETS Forum Award? Which company has demonstrated exceptional performance during these challenging times? Who will follow the winner of 2021, Beeztees, as the next top performer?

Last year's winner: Beeztees

Nominees



Johnson Petfoods BV (The Netherlands)

Eleven years ago, Johnson Petfoods was built from scratch with a mission in mind: providing the world

with healthy, artisan pet food. Their first range went down well and the company's status skyrocketed. They have received numerous awards in the Netherlands as a fast-growing company and the team now consists of twelve ambitious pet enthusiasts.



Josera GmbH (Germany)

For over eighty years, Josera has been driven by their passion for animals and commitment to the environment. Successful

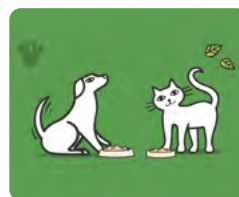
global partnerships enable them to spread this commitment through a diverse product portfolio. With a 100% climate-neutral facility and state-of-the-art technology, they are setting a benchmark, not just in innovation and sustainability but also in the quality of their accredited pet food products.



COLLAR Company (Ukraine)

COLLAR Company started when Yuriy Sinitsa made his first collar for his dog and his friends liked it. Twenty-five

years later, COLLAR had grown into an international company with 500+ employees selling its products (accessories, toys, aquatics and cat litter) to seventy countries worldwide. Their ability to create a unique design, innovative solution and exclusive brand gives them a competitive advantage.



Lily's Kitchen (United Kingdom)

Lily's Kitchen is a pet food pioneer. The company makes wholesome, natural pet food for cats and dogs. When Lily

the border terrier was ill, it was her owner Henrietta's homemade cooking that made Lily better. Lovingly started from a kitchen in London, Lily's Kitchen cat and dog foods are now sold in over thirty countries. The fast-growing company founded on passion and innovation is a founding UK B Corps member. ♦

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Dingonatura S.L. (Spain)

Dingonatura has been producing high-quality natural food for dogs and cats since 2001. Under the motto 'Cooking values beyond diet', they keep pets healthy with a natural and balanced diet that also respects the environment. They do this with the sustainability protocols of the Pet Sustainability Coalition and their company values: Protect, Respect and Be Natural. In 2019, Dingonatura opened a new production plant referred to as 'The new kitchen', in which respect for the environment has been prioritised by integrating energy and low emission cogeneration processes.

M-PETS (Belgium)

M-PETS is a company specialised in the manufacture and distribution of innovative and exclusive pet products. The company provides a complete range for dogs and cats with over 350 patents and is available in more than fifty countries worldwide. M-PETS products are attractive, functional and environmentally friendly certified (FSC, TÜV Rheinland, GRS).



Global pet industry

Kormotech LLC (Ukraine)

Founded in 2003, Kormotech is a family-owned Ukrainian manufacturer of cat and dog food. Their own brands and private label products are available in 37 countries: OptiMeal (super premium), CLUB 4 PAWS (premium), My Love™ and Master (regular). Each product is manufactured under the strictest supervision at Kormotech's three own state-of-the-art production facilities: two in Ukraine and one in Lithuania.



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Hesitating
about going
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The time for AR and VR is now!

Augmented Reality (AR) is digitising products so they can be placed in reality. The technology has never been more accessible. The results: higher conversions, fewer returns and a better customer experience.

From online to real life

Digitised products, whether it is pet toys, rabbit hutches or dog beds, can be used for your webshop, marketing campaigns or even in a virtual showroom. Virtual Lab 17 has digitised 150 of Petrebels' collections of scratching posts for cats. Now, customers can simply choose a scratching post on the Petrebels website and place it in their own living room, full size. And they only need their smartphone to do so. That enables them to experience what the product looks like in 'real life' and even walk around it.

Imagine how this adds to your customer experience. And it leads to higher conversions and fewer returns, because you are giving your customers a very precise expectation of the product they are buying.

Augmented is accessible

The time to go virtual is now, because this technique – with an app no longer required – was released just a year and a half ago. And it is booming. Both Google and Apple are investing in the possibilities of the virtual world. It will not be long before Google starts offering (and pushing) 3D results like AR in their search engine.

Simply because trying out a product in your own home adds to the buying experience. And Google wants to cater to the needs of their clients the best they can.

Measurable and value for money

Digitising really pays off. And that is not only based on Virtual Lab 17's and their clients' experiences, but also on research conducted by Shopify, a webshop software supplier with over one million clients. People tend to buy more, return less and have a better online experience. Also: everything they do, where they click and how long they look at your product, is registered. So the return on investment of digitising your product is measurable.

Curious to learn more? Virtual Lab 17's presentation at the GlobalPETS Forum 2022 will tell you all about Augmented Reality and Virtual Reality (VR). ♦



Johan Brinkman

Co-founder and Creative partner at Virtual Lab 17
johan@virtuallab17.nl
virtuallab17.nl



The logic behind consumer trends

Did you know that there is a logic behind trends? And that consumer trends are no coincidence?

Fixed cycle

Trends are driven by the fixed cycle of the Zeitgeist, the dominant mentality in society – the spirit of the times. If you are aware of this trend cycle, you will know which ones will become dominant and which ones you can leave behind.

Zeitgeist trend model

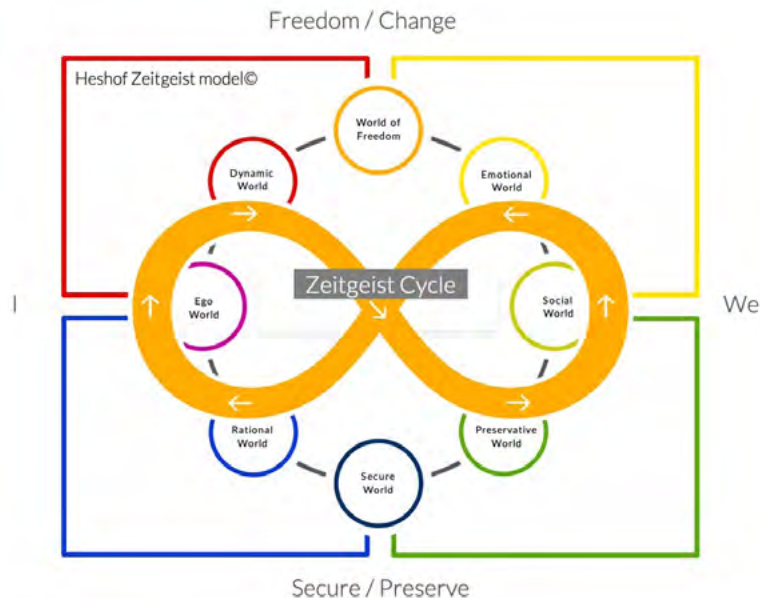
This model is based on the idea that societies develop in cycles, like the Kondratieff cycles. To create a consumer cycle, I have developed the *8 ConsumerWorlds*, where every world stands for a person's core need.

The *8 ConsumerWorlds* are plotted on the well-known Carl Jung model: I versus We and Freedom versus Secure. It is a dynamic model rather than a static one, because every forty to fifty years the same consumer needs become dominant again, expressed in a different form, product, service or experience.

Early 2000s: green

The Green Zeitgeist at the beginning of the new millennium was a reaction to the nineties. The 1990s were all about living life to the max. The Berlin Wall had collapsed, the free-market economy has triumphed, European countries could join the EU and the euro – without proper checks.

When society is at the top of the model for too long, a big correction follows. The first during this period was the dot-com crash and a much bigger one was the credit crisis. As a consequence, society went back to its origins – Back to Basics. The Green Zeitgeist is driven by two consumer worlds, the preservative and the social world, leading to six consumer trends. To name a couple: *Keeping what is good* (we value good stuff from the past, such as vintage clothing and retro cars like the Mini Cooper and Fiat 500) and *Authenticity is the biggest trend* (we value the real thing, for example pure, natural and honest food).



Current Zeitgeist: yellow

After the Green – Back to Basics – period, Western society shifted towards the Yellow Zeitgeist, which is about the New Order. Many people, especially millennials, started to challenge existing systems and create new ones. They were asking fundamental questions. Does everyone need their own car? How can we make the food system more sustainable? This period led to tensions (yellow vest and climate protests) but also to many new opportunities, with start-ups, scale-ups and unicorns (Tesla, Airbnb, Uber, Ayden).

The Yellow Zeitgeist is driven by two consumer worlds, the emotional world and the world of freedom, leading to six consumer trends. Some examples are *Wellness is the new status* (we want to feel good, physically and emotionally) and *Time for inspiration and new experiments* (we are open to new combinations and setting new frontiers, like outer-spacers Branson and Bezos).

These yellow consumer trends are still relevant today and for the coming years, but it will not be long before we go into the next phase, with COVID-19 accelerating the shift.

Next Zeitgeist: blue

The Blue Zeitgeist will become dominant in the years to come. In this Smart Well-being period, people will want to know what is best for them and best for the planet. Not based on what foodie influencers say, but based on science, a rationale or personal markers. We will go from the emotional world of storytelling and experiences towards the rational world of facts and proven impact.

The Blue Zeitgeist is driven by two consumer worlds, the secure and the rational world, leading to six consumer trends and numerous brand opportunities as we head for 2030.

During my presentation at the GlobalPETS Forum in Amsterdam Beach, you will get to know more details about this and gain a better understanding of what is coming next. ♦



Peter Heshof
Zeitgeist trendwatcher, Consultant and
Founder of Trend Agency BLOOM
peter@tobloom.nl
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Trends in design and colour



What is trendy right now? What are the things you should pay attention to when creating a new product? Or what can be used as inspiration?

Inclusive

The word 'inclusive' is everywhere. Everyone should be included and be able to participate! No matter what their age, skin colour, gender or challenge is. This is also reflected in marketing, which now actively portrays a wider variety of people.

Tech

The tech industry has not been standing still either. New Zealand start-up Rocos partnered with Boston Dynamics to deploy a fleet of dog-like robots called Spot, to herd sheep and conduct other agricultural tasks. Or what about ambient learning? A natural way of learning and experiencing things from your home environment through a combination of everyday objects and technology.

A good example of this kind of collaboration is how the Jane Goodall Institute and Crate&Kids (US home furnishing brand Crate&Barrel's children's label) created

a product line that inspires children to get to know more about animals in their natural surroundings. The goal being to pull children back into the 'analogue' world and away from screens and displays.

Carbon footprint

'Reduce your carbon footprint' is the slogan of 2021. Not just for business, but for people in general. There is even mention of a so-called carbon tax for private individuals in the Netherlands. Companies that manage to reduce their carbon footprint as much as possible are being praised, and a range of innovations to go even further on this front will continue to present themselves in the near future.

Materials

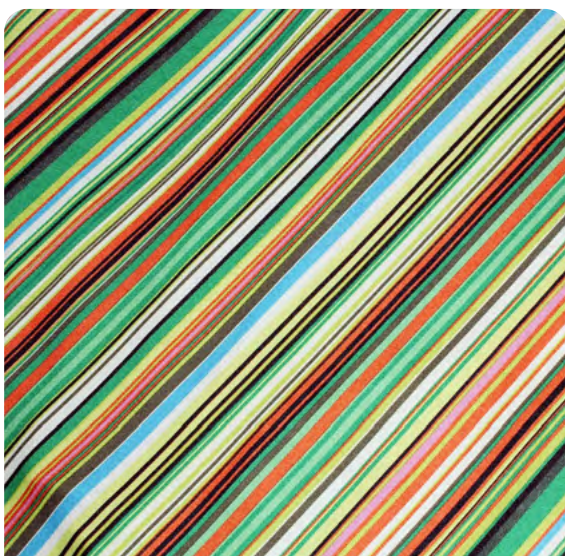
The 'human touch' in fabrics will be translated into materials that act like a second layer of skin. Fishnet textures and thinly knitted creations immediately come to mind. And all in a variety of natural hues, combining



materials like leather, cotton, linen and thin wools. Keeping fashion accessible and comfortable.

Colours

'Start with a clean slate' seems to be the creed for the next phase of the pandemic. White can be seen as this year's colour, along with a multitude of soothing matt colours and pastels to create a calm zone. But together with a brightly coloured item to express positivity, to say 'we can!' And a little glitter and glamour too, to make sure you are seen now that you are out and about again, even if it is just down to a beach.



Prints

70s prints will be here to stay a little longer, as they are cheerful and apply to this day and age. Tie-dye shapes, flowers, cubes, stripes, tight coloured lines and so many more inspirations from that era on natural materials are a common sight.

The pandemic caused some shipping problems, making some materials temporarily unavailable, so many designers started to re-use clothing items. Resulting in a mixture of materials and prints in their designs. A solution, perhaps, to permanently reducing that carbon footprint? ♦



Marlou van Teunenbroek
Online and offline concept creator
info@louzepouz.nl
louzepouz.nl | planmconcepts.nl

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Istanbul Expo Center (IFM), Hall 9-10-11

Istanbul, Turkey

petfuari.com/eurasia/en/



China International Pet Show (CIPS)

17 to 20 November 2021

National Exhibition & Convention Center (NECC)

Shanghai, China

en.cipscom.com



Nordic Pet Food Conference

9 to 10 November 2021

Radisson Blu Hotel Lietuva

Vilnius, Lithuania

norpetfood.com



Pet South America

30 November to 2 December 2021

São Paulo Expo

São Paulo, Brazil

petsa.com.br/en



Zoomark

10 to 12 November 2021

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Contact us

Armenia, Azerbaijan, Belarus, Georgia,
Kazakhstan, Kyrgyzstan, Moldova,
Russia, Turkmenistan, Ukraine,
Uzbekistan

Yulia Dolzhenkova,
Zooinform
+7-4903-6132812
+357-9648-5560
us@zooinform.ru

Austria, Belgium, Finland, Germany,
Netherlands, Portugal, Scandinavia,
Spain, Switzerland

Miguel Mendes de León,
Agri Cross Media
+31-6-81543366
miguel@agricrossmedia.com

China, Hongkong, Macao, Taiwan

Ding Liu
+86-10-88102253
liuding@chgje.com

France, Monaco

Alain Girardet, g i r e x agencies
+33-6-0828-1482
girardet.alain@wanadoo.fr

Greece, Bulgaria, Cyprus

Vassilis Goulielmos,
Welldone Ltd.
+30-211 4021758
info@welldone.com.gr

Italy, Malta, San Marino

Rita Buffagni & Lavinia Fressura,
Mediatic
+39-0522-383620
media@mediatic.it

Poland

Mateusz Karatysz,
+48-51-737-84-03
mateuszkaratysz@gmail.com

Turkey

Cengiz Gümüş
+90-212-321-10-02
cengiz@ulusalfair.com

United Kingdom, Ireland

Andrew O'Kelly, KOA Media Limited
+44 (0)7973 552381
andrew.okelly@koamedia.co.uk

United States & Canada

Philippe Vanderhoydonck,
GlobalPETS
+31-6-11717071
philippe@pets.nl

Rest of the world

PETS International &
GlobalPETS head office
+31-33-422-58-33
info@pets.nl

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PETS International & Global Pets Community B.V.

James Cookstraat 13, 1056 RW Amsterdam, The Netherlands

+31-33-4225833, info@pets.nl

Managing Director: **Philippe Vanderhoydonck**, philippe@pets.nl

Board member: **Gerard de Niet**, gerard@pets.nl

Board member: **Corine van Winden**, corine@pets.nl

Designer: **Jack Waas**

Senior editor: **Heiny van den Ham**

Editors: **Lynn Radford**, **Marita van Oldenborgh**,

Martine Croll, **Mandy Wolters-Savage**

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