



The European
Pet Food Industry

FEDIAF
**ANNUAL
REPORT**

2019





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Pet Food Industry

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Serving pets
and their owners.

A message from the FEDIAF President



One year has already passed since I became President of FEDIAF – and it is a true pleasure to work with industry colleagues from all over Europe. In our National Associations, Committees, Working Groups and Task Forces we have members fully committed to our common cause: Maintaining and improving a regulatory environment for the supply of safe, nutritious and palatable pet food.

Our work over the past year in this area has been diverse: Safety, Labelling, Nutrition, Feed Additives, Environment, Raw Materials, Trade. A big Thank You for the excellent work continuously and successfully delivered in very constructive cooperation with national and European authorities.

But our mission and vision go beyond this regulatory work, even though it is extremely important. Building on previous communication activities, we have in the past year greatly improved our reputation management, our communication activities and our external visibility: A significantly improved FEDIAF website, more press releases with corresponding coverage, new fact sheets on pet food issues, intervening at more conferences... We have so many good stories to tell about our industry, the science behind it and the benefits of pet ownership. FEDIAF did a great job over the past twelve months to tell these stories to the outside world.

In a globalised economy, also in pet food, we continue to work closely with our global association GAPFA on communication, safety standards, nutrition and trade. This has allowed us to engage with global stakeholders such as the OIE (World Organisation of Animal Health) with the aim that the high European standards on safe sourcing and safe processing of pet food could become one day a global standard.

Fostering free trade is a priority for a mature market as the EU and our pet food exports to third countries are now in excess of €1bn with a steady growth. We see also more pet food products entering the EU market which do not always comply with current EU legislation or co-regulation, clearly unfair practices which FEDIAF is addressing.

The major reform of FEDIAF's governance with reduced fees for our smaller associations and direct membership of companies has now been operational since 2018. It has strengthened the organisation and improved efficiencies. We also introduced a CEO Forum with an advisory or "stimulatory" role: Advice is sought from CEOs to think outside the box and to hear expectations what FEDIAF can do more, do better, do differently.

FEDIAF can be proud of the excellent work of the team in Brussels, now back to the strength of three staff with the recruitment of Jakub Rusek in 2018. Thomas, Julien and Jakub coordinate all our activities, manage stakeholders of the European institutions and of sister associations and successfully defend our interests. Our national and our European associations are the voices of our fantastic industry – thanks to all for their good and steadfast work!

I look forward to my second year as FEDIAF President!

Mechthild Exner-Herforth

A handwritten signature in blue ink that reads "M. Exner-Herforth".

Welcome from the FEDIAF Secretary General



I completed my 21st year at FEDIAF in February 2019 – the challenges and interactions with members and external stakeholders, the different subjects and the diversity continue to be very fulfilling.

Working for the pet food industry is highly complex and technical, as are the EU rules and regulations we are assessing and shaping. But the pet food industry works for living beings: Pets and their owners. This makes our work so rewarding – by providing safe and high-quality products we contribute to happier and healthier lives of pets with their owners.

One of our key achievements in the last year was the review of our Code of Good Labelling Practice for Pet Food with valuable inputs from the European Commission and all Member States. Our revised Code was finally endorsed by the national and EU officials in September 2018.

Correct, truthful labelling of pet food is very important for consumer information, for control authorities and for marketing purposes. Having now an improved Code supported by all EU Member States elevates this tool to a more important level than it had before: It should lead to an even more harmonised application for European and imported pet foods creating a level playing field for all operators. Our Code should be used by companies as well as authorities as a reference document.

Over the years at FEDIAF, and also during the past year, our organisation has been undergoing positive changes. From being more reactive in the past, our federation has become increasingly proactive, forward looking and more outgoing. We have importantly stepped up our communication activities, we are more present at events and conferences presenting our work and spreading our

messages, we have more publications and we increase our network. This is necessary in a world of more press attention, social media and “fake news” – this relatively new open FEDIAF approach is beneficial for the reputation of our industry.

All our activities and successes would not be possible and manageable without the active involvement of the FEDIAF experts from companies and from the national associations. A great thanks to all responsible for providing these human resources and to all industry experts for their contributions.

Successful work in the capitals of Europe is only possible if a sector can rely on EU officials being prepared to lend an ear to particular concerns. On FEDIAF's behalf, I am grateful that civil servants are open to our concerns, they always listen, and they often question – but solutions are nearly always agreed. An additional thanks to EU officials for their good cooperation.

Finally, I express my gratitude to the FEDIAF staff: Julien Taïeb remains a pillar of the organisation with his professionalism and diligence; the best “number 2” we ever had and with potential for more. Jakub Rusek has integrated into the team and understood the many dossiers extremely rapidly, he is another asset. The teamwork with both is at the same time very efficient and most pleasurable.

I look back on a gratifying and stimulating working year with an excellent President supporting and developing me personally and with active involvement in FEDIAF dossiers. I can only look forward to the coming working year with her and with new challenges.

Thomas Meyer

A handwritten signature in blue ink, appearing to read 'Thomas Meyer', with a long, sweeping underline.

The Pet Food Industry in 2018 – key milestones

1

Feed Materials and Trade:

Maintenance of workable rules for animal by-products and increased activities for export to third countries.

2

Environment and Sustainability:

Adoption of the PEFCRs (Product Environment Footprint Category Rules) for prepared pet food for cats and dogs by the European Commission and Member States in April 2018, cementing its position as THE reference document for companies wishing to calculate their environmental footprint.

3

BREF Task Force:

Active input to the BAT (Best Available Techniques) conclusions and BAT associated emission levels in preparation to be fit for pet food businesses.

4

Nutrition and Analytical Science:

Publication of the updated FEDIAF Nutritional Guidelines 2018 both online and as hard copies.





5

PARNUTs Task Force:

Successful submission of all pet food PARNUTs (particular nutritional purposes) to the EU and draft regulation ready. Adoption expected to disband the taskforce.



8

Additives and Undesirable Substances:

Recruitment of new members to the working group, bringing additional expertise and breadth to the team.

Transition period to a new chair and vice chair completed with refreshed priorities for 2019 and beyond.



6

Product Communication:

Endorsement, by unanimity, of FEDIAF's updated Code of Good Labelling Practice for Pet Food by EU's SCoPAFF (Standing Committee on Plants, Animals, Food and Feed).



9

Communications:

Publication of nine factsheets on a range of popular feeding topics plus nine press releases – all available at www.fediaf.org



7

Feed Hygiene and Safety:

Approval of the Guide to Good Practice for the Manufacture of Safe Pet Foods and finalization of the Training Modules. The request of OIE (World Organisation for Animal Health) for information on processes to mitigate Avian Influenza, showing the cooperation between GAP-FA (Global Alliance of Pet Food Associations) and OIE.

FACTS & FIGURES 2018

European overview



Estimated number of European Union households owning at least one pet animal:

80 million households

Estimated percentage of European households owning at least one cat or one dog:

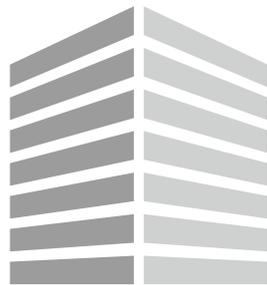
EU:
Cats 23%
Dogs 25%

Europe:
Cats 25%
Dogs 24%

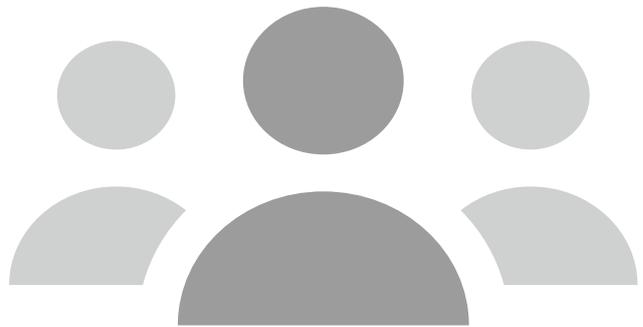


132 pet food companies

200 plants (est.)

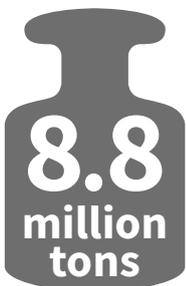


Employment



Est. direct employment:
100.000

Est. indirect employment:
900.000



Annual sales of pet food products:

Turnover: € 21 billion



Annual value of pet related products and services:

€ 8,5 billion accessories
€ 10 billion services
Total: € 18,5 billion



Top pets in Europe



Annual growth rate of the pet food industry (average value over the past 3 years)

2,5%

*excl. Baltic States and Sweden | ** excl. Baltic States and Nordic Countries | *** This corresponds to an estimated 300 million ornamental fish

FACTS & FIGURES 2018

Top pets in Europe

Cat



Total European Union: **75.324.000**

Total Europe: **103.828.000**

Dog



Total European Union: **65.509.000**

Total Europe: **85.184.000**

Bird



Total European Union: **35.571.000****

Total Europe: **50.212.000****

Small mammal



Total European Union: **19.400.000****

Total Europe: **26.794.000****

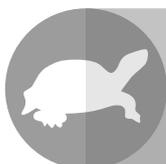
Aquarium This corresponds to an estimated 300 million ornamental fish



Total European Union: **10.643.000****

Total Europe: **15.493.000****

Reptile



Total European Union: **6.303.000***

Total Europe: **7.848.000***

Sources: Figures from FEDIAF and its member associations, pet food companies and estimations based thereupon when indicated
 European Union/Europe: *European Union* includes the 28 Member States of the EU whereas *Europe* includes Member States of the Council of Europe
 *excl. Baltic States and Sweden | ** excl. Baltic States and Nordic Countries



a. Feed Materials and Trade

Introduction

The Feed Materials and Trade Working Group is comprised of industry experts in the field of raw materials (especially animal derived raw materials) with knowledge of trade and its potential restrictions.

The rules for animal derivatives are covered by the Animal By-Products Regulations. Over 350 pages of stringent legislation, related to maintaining human and animal health and providing safe raw materials for our industry, which makes any proposed amendment a potential issue for the pet food industry.

As a group we build on the experience and insight of our members to identify potential issues. Sometimes a simple “and” or “or” in the legal text can make all the difference.

Objectives

Maximize opportunities for FEDIAF members to market their products:

- Ensure that valuable raw materials can be used by the pet food industry
- Establish the right sourcing and processing standards to protect animal and public health
- Facilitate intra and inter community trade (non-tariff barriers; customs codes)

Achievements

Monitoring New Trade Opportunities & Implications of Brexit

The focus of the 2018 FEDIAF AGM Seminar was how to facilitate future trade. During the event, the panel of industry experts discussed the opportunities and the threats when trading with global markets. With all its uncertainty and potential opportunity, the UK becoming a third country by leaving the EU (“Brexit”) was a key focus during the discussion.

The group has also been looking at the opportunities on the other side of the globe: Input was provided for the launch of an EU-Australia free trade agreement. This free trade agreement will be one of the key focal points for the years to come.

Cooperating with legislators

The group has worked on the amendments of the:

- **EU Animal By-Products Regulation:** Adaptation of the microbiological limits for raw pet food in line with human food standards; alignment of import health certificates with international transmissible spongiform encephalopathy (TSE) rules.
- **Key EU export markets (Ukraine/Russia/Turkey):** Monitoring developments and highlighting opportunities for improving cross border trade.



b. Environment and Sustainability

Introduction

The Product Environmental Footprint (PEF) pilot phase concluded in 2018 with the adoption of more than 20 Product Environmental Footprint Category Rules (PEFCRs).

With the PEF methodology and Category Rules agreed, the European Commission launched the “PEF transition phase”. The aim of this phase is to define the policy options and communication vehicles for implementing the PEF methodology in the EU regulatory framework. However, any pet food company can use the PEF methodology and the Category Rules from now on to assess the environmental footprint of its products.

The IPPC SCP Expert Group (Integrated Pollution Prevention and Control, Sustainable Production and Consumption) – composed of the European Commission, Member States and selected industry representatives – was revived. The food and beverages sector was invited to organise itself into two clusters, from which representatives will sit at the negotiation table. FEDIAF plays an important role in the ongoing clusters’ discussions with the other food and drink chain partners.

Finally, FEDIAF took the decision in September 2018 to extend the remit of its Environment and Sustainability Working Group. A mapping of all environmental legislative initiatives and issues is currently being carried out, with a view to setting up a brand new work plan for the coming years in the first half of 2019.

Objectives

FEDIAF’s primary goal is to enhance the visibility of the pet food industry on environmental issues and showcase pet food companies’ commitment to more sustainable and environmentally friendly production.

More specifically on PEF, FEDIAF’s aims are threefold:

- To educate FEDIAF’s members on PEF methodology via two training webinars scheduled for the first half of 2019.
- To help shape a voluntary and flexible regulatory framework, which will facilitate the implementation of the PEF methodology.
- To maintain the economic allocation as the method of allocation of environmental impacts for animal by-products

Achievements

One main achievement and milestone for 2018 was the adoption of the PEFCRs for prepared pet food for cats and dogs by the European Commission and Member States in April 2018.

This endorsement set our PEFCRs as THE reference document for pet food companies to calculate the Environmental Footprint of their products.

Introduction

Pet food plants with a finished product production capacity of at least 75 tons per day and using more than 10 per cent feed materials of animal origin have their environmental permit delivered upon compliance with the Reference Document on Best Available Techniques in the Food Drink and Milk Industries (FDM BREF - 2006). For further information see <http://eippcb.jrc.ec.europa.eu/reference/>

In 2013, a review exercise of the Food, Drink and Milk Industry (FDM) BREF document was launched and the FEDIAF BREF Task Force was set up to contribute to this process. Since then, the Task Force has been working closely with the European Integrated Pollution Prevention Bureau (EIPPCB), the Industry, the members and other organisations to make improvements to the list of Best Available Technique and Associated Emission Levels (BAT AELs).

Objectives

- To identify which techniques may reduce emission levels and agree workable guideline levels.
- To validate the description of pet food production techniques quoted in reference documents.
- To guarantee that the document has a comprehensive chapter dedicated to pet food with typical emission values.

Achievements

Thanks to the great work of the FEDIAF BREF Task Force many positive achievements can be reported in 2018, including:

- An animal feed chapter in the revised FDM BREF clearly distinguishes feed from pet food. Pet food processes and techniques are now well detailed and explained.
- Dry pet food being excluded from the scope of BAT-Associated Emission Levels (AEL) on water emissions.
- Dry and wet pet food being excluded from the scope of application of BAT-AEL on dust emissions.
- BAT-AEL range values for energy efficiency changed into indicative environmental performance levels.
- BAT-AEL range values for waste water discharge changed into indicative environmental performance levels.

The review of the FDM BREF

FDM BREF Review
TWG Workshop on data assessment
Seville, 9 – 11 October 2017

European IPPC Bureau

Industry

Environmental
NGOs

Data + information
09/2015

TWG
kick-off meeting
10/2014

Draft 1 (D1)
01/2017

Workshop FDM data
10/2017

Final TWG meeting
Backgroundpaper: 8 weeks
before the final Meeting
Second Quarter 2018

Final draft
Last Quarter 2018

EU Member States
+ EFTA and Accession Countries

**European Commission/
EIPPCB**

TWG Comments

- Forum opinion on BREF
- Adoption of BAT conclusions through the IED Art. 75 committee

TWG Comments



BAT
conclusions



Introduction

One of FEDIAF's main objectives is to safeguard the wellbeing of pets by providing well-balanced and nutritionally sound pet food through its member companies. To achieve this goal, FEDIAF's experts work together with a Scientific Advisory Board (SAB) that includes independent and renowned scientists from European countries. The Scientific Advisory Board advises on the scientific standards of the recommended nutrient levels so that the latest research results are transferred into the guidelines and for good feeding practice.

FEDIAF is regularly adapting the recommendations for nutrient levels in pet food in close cooperation with the Scientific Advisory Board and based on the latest peer-reviewed science. This enables the pet food industry to adjust the nutritional quality of complete diets for dogs and cats based on state-of-the-art scientific knowledge.

Objectives

- Contribute to the wellbeing of pets by ensuring the manufacture of nutritious and palatable food through provision of advice reflecting the most recent developments in scientific knowledge
- To be the "go to" document on pet nutrition in Europe – and beyond.
- To ensure a level playing field and enhance scientific cooperation between pet food manufacturers, pet-care professionals and competent authorities.

Achievements

FEDIAF released the revised 2018 Nutritional Guidelines for cats and dogs. For the first time ever, the Guidelines were also made available as hard copies. These were presented at the 22nd European Society of Veterinary and Comparative Nutrition (ESVCN) Congress in Munich, where each participant received a copy in their conference bag, further promoting FEDIAF's work. The new Nutritional Guidelines attracted significant media attention in the trade press.

FEDIAF worked on phosphorus sources in a cats diet.

In the light of recent scientific findings suggesting the possible impact of phosphorus on a cat's renal health, a phosphorus subgroup was set up, comprising members of the Nutritional and Analytical Science Working Group and the Scientific Advisory Board. Based on the subgroup's recommendation, and pending additional research being undertaken, a footnote was introduced in the FEDIAF Nutritional Guidelines raising awareness of possible negative impact of highly soluble inorganic phosphorus compounds in cat food. The sub-group continues to monitor and review new science in order to decide about the adaptation of recommended phosphorus levels in cat food in the future.

The Scientific Advisory Board completed its transition to a new Chair, continuing the successful work of the previous leadership.



e. PARNUTs Task Force

Highlights from
FEDIAF Groups

Introduction

Nutritional guidelines are designed for healthy cats and dogs, at various stages of their life. However, during their lives, cats and dogs may suffer from temporarily or irreversibly impaired metabolism, such as chronic insufficiencies, food intolerances, urinary stones or disorders associated with a higher prevalence while ageing. Pet foods for PARTICULAR NUTRITIONAL purposes (PARNUTs) are designed to address these specific needs.

At the end of 2011, the EU discussed abolishing legislation for specially formulated diets, unless FEDIAF updated the essential nutritional characteristics, which were deemed too vague in some areas.

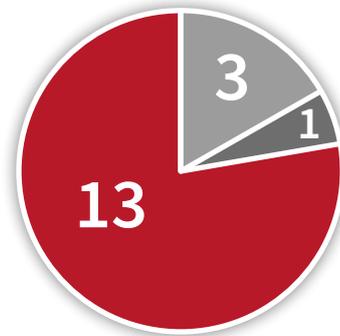
This FEDIAF task force looks at PARNUTs and works closely with industry experts on the subject of dietetic nutrition for cats and dogs. The maintenance of the longstanding legislation covering those diets is the mission of the PARNUTs task force, for an enduring and clear regulatory framework, creating the level playing field and allowing a better quality and sometimes longer life for those pets.

Objectives

- Collate the latest science in the area of dietetic nutrition for cats and dogs.
- Provide DG SANTE with scientific dossiers so that the essential nutritional characteristics of the historical 17 PARNUTs can be updated, with objective compliance criteria.

Achievements

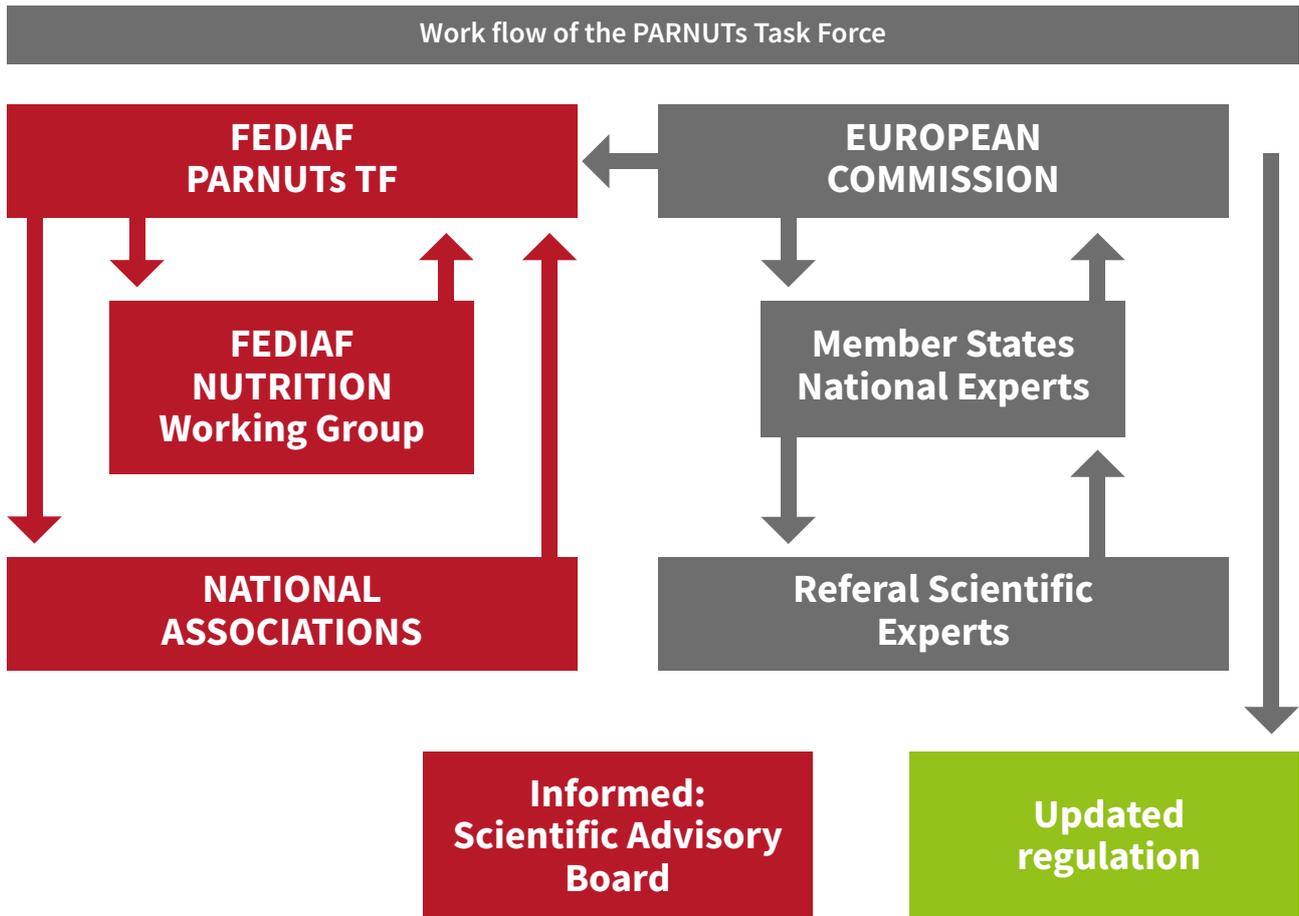
- Three amendments published in 2014 and 100 per cent of dossiers submitted as of end 2017.
- In 2018, PARNUTs task force submitted answers to all questions raised by the German and the French scientific evaluation agencies. In total, all the comments and questions have been addressed for 16 out of 17 of the dossiers.



- published
- scientific opinion expected
- drafted

In 2019, we expect the new PARNUTs criteria to be approved and the new regulation published.

Scientific consensus is the backbone of the task force work, transparency its signature. All proposals were shared with the Industry before being assessed by the European Commission and some national independent scientific agencies. Amendments to the regulation result from this comprehensive process.





Introduction

The Product Communication Working Group comprises industry experts in the field of labelling legislation, with a good knowledge and perspective from both legal and technical points of view.

Pet food has its own specificities. FEDIAF needs to highlight these characteristics to the EU authorities, so they are taken into consideration when regulating about labelling.

Some of these characteristics are distinctive from other EU industries:

- The communication on our products involves a significant amount of non-mandatory declarations (ingredient content claims, functional claims...). It is therefore necessary to define the detail and how this communication needs to be made, as the EU regulations do not cover these areas.
- The majority of our packs are pre-printed, which does not allow for quick modification of labels. Moreover, as unused, outdated packs will need to be destroyed, there is a high environmental and economic impact.
- Most of our products are complete products (i.e. the only meal for the animals), which implies that the product has to contain all necessary nutrients.

Labelling has become a much wider concept during the last few years. It is not only related to on-pack communication (as was at the very beginning), but now involves all channels of communication, including on-pack, but also leaflets, TV-advertising, internet, etc.

Objectives

The development of an even playing field for the European Pet Food Industry, with a focus on non-misleading, consumer-oriented information, mainly by:

- Working together with the European Commission, so the authorities understand and consider our specificities.

- Identifying new regulations or modifications of current ones, which may affect the Pet Food Industry business; looking for alternatives/solutions and working together with authorities in order to overcome these obstacles.
- Developing and maintaining the “Code of Good Labelling Practice for Pet Food” (as provided in Article 25, Regulation 767/2009), which provides guidance on how to apply current EU regulations and explains how to communicate the non-mandatory information.

Achievements

Code endorsement – During the September SCoPAFF meeting, all National Experts unanimously endorsed the updated Code. This new version includes not only all legislative changes since the previous version, but also updates and enhances all chapters in order to improve the Code’s content and its use.





Introduction

The working group started to develop a “Guide to Good Practice for the Manufacture of Safe Pet Foods” in 2001. The Guide was originally referenced in the Official Journal in 2007 and first revised in 2010. Over the last couple of years, a further revision of the Guide has been developed.

Objectives

- To finalise the Guide and secure endorsement by SCoPAFF.
- To develop training modules to support the implementation of the guide.

Achievements

Updated Guide to Good Practice for the Manufacture of Safe Pet Foods: The working group has continued to work on updating this Guide. The Guide was revised in the same format as the Nutritional Guidelines and the Code for Good Labelling. A new version of the Guide was endorsed by SCoPAFF in February 2018 and is now available on the FEDIAF website and in a printed version.

Development and Implementation of Training

Module: In 2017, there were several meetings to discuss the work done by the members of the group. The group worked on the following modules:

1. Introduction
2. Pet food safety management system
3. Pre-requisite programs
4. HACCP
5. Pathogens monitoring

When finalizing the training modules, it was agreed that national associations would organize training sessions with the industry (members and non-members), in cooperation with the authorities in their own markets. The training materials and the new version of the Guide are available on the public part of FEDIAF's website.

- FEDIAF's Feed Hygiene & Safety Working Group was leading the Feed Safety Work Stream in GAPFA until the GAPFA AGM in October in Yokohama. The role was then handed over to the Brazilian Pet Food Association.
- The GAPFA Food Safety Guide was published on their public website and was the most downloaded document in 2018.
- In 2018, FEDIAF's commitment to work with the OIE (World Organisation for Animal Health) was formalized in a letter.
- In cooperation with the GAPFA Trade Facilitating work stream, the working group conducted the preparation work for a global health certificate and eventually a specific chapter in the OIE Terrestrial Animal Health Code. The goal is to ease international trade between the regions.
- Bimonthly teleconferences were organized to align and follow the work to be done in the work stream.
- GAPFA was recognized as a trustful partner of the OIE giving support on control and mitigation of Avian Influenza in processed pet food.





h. Additives and Undesirable Substances

Introduction

FEDIAF's Additives and Undesirable Substances Working Group includes European industry experts on legislation governing feed additives and undesirable substances. The team also has expertise in key functional areas such as chemistry, toxicology, testing and business understanding.

Additives are an essential component in offering a safe, stable and nutritionally balanced diet to pets across Europe, they are also key to ensuring the products achieve the high levels of pet and owner acceptance in terms of flavour, texture and appearance that enables the pet food business around Europe to thrive.

Only additives that have adhered to the strict authorization/reauthorization processes of the EU are permitted for use. The working group continuously engages with the European Commission and the European Food Safety Authority (EFSA), to ensure that key ingredients used by the industry are thoroughly assessed with the best possible body of evidence and reapproved. Where an additive is withdrawn, FEDIAF is effective in exploring favourable terms for the withdrawal to minimise disruption for our industry and pet owners across Europe.

Similarly, undesirable substances are a constant threat in a world where ingredients are more and more sourced from a global supplier base. FEDIAF, in association with the European Commission and EFSA, are constantly vigilant to emerging threats, and proactive in managing existing known issues. As a group, we respond to emerging evidence of contamination, work to understand the impact, respond on behalf of the EU pet food industry and work with key authority representatives to protect, pets, owners and the environment from genuine threats, while responding robustly to false alarm stories that could damage the reputation of a responsible industry.

Objectives

- Ensure the safety and utmost quality of every ingredient used in pet food.
- Enable excellence in safe and balanced nutrition through maintaining access to key nutritional sensory and technological feed additives.
- Encourage freedom for our members to innovate through access to additives designed to maximise pet and owner experience through all five senses.

Achievements

- **Vitamin B2** produced with genetically modified organisms: Advocating for more favourable withdrawal terms to protect the ongoing supply of pet food across Europe as replacement supplies of the key nutritional additive were sourced.
- **Buthylated Hydroxy Anisole (BHA)**: Formed a coalition of key partners to capture the data required to rebut the opinion of EFSA, which would lead to the withdrawal of BHA authorization for cats causing significant disruption. Literature and industry held data report generated and submitted back to EFSA for consideration.
- **Acrylamide**: Robustly responded to a Swiss consumer magazine article suggesting high levels of acrylamide contamination in pet food. Created and deployed holding statements and mobilized the team to begin generation of definitive data for future proofing against the establishment of a limit for this contaminant.
- Preparation and delivery of the annual **mycotoxin survey report**.

Introduction

Good communication is vital for any organisation. It is key for building relationships, key for spreading knowledge and information, and regular communication both internally and externally generates transparency and helps build trust. As the trade body representing the European pet food sector, it is important that FEDIAF communicates and communicates well.

Objectives

- Raise the profile and reputation of FEDIAF as the key voice of the European pet food industry.
- Create a positive image of the industry grounded in facts, science and expertise.
- Establish the FEDIAF website as the 'go-to' source for objective, scientific and factual information on pet food.

Achievements

The Communications group has been running for two years. Our focus has been on establishing the fundamentals of our communications function – a fit for purpose website, regular member newsletters, regular press releases updating on the work of the association, writing features for trade journals, participating in relevant industry events and developing educational tools on pet food nutrition topics for pet care professionals across Europe.

Alongside this core activity, we also initiated proactive project work such as promoting the science behind FEDIAF.

Achievements in 2018 include:

- A key focus has been on evaluating and measuring the impact of our work and we now produce and review quarterly website analytics and media outcomes report.
- Published nine factsheets on a range of popular feeding topics – homemade diets, responsible raw feeding, choosing the right pet food, vegetarian diets and many more. The full range is available at: <http://www.fediaf.org/prepared-pet-foods/nutrition-fact-sheets.html>.
- Published nine press releases generating news in eight languages. Topics included the release of the expert paper on nutrition for senior dogs, industry's latest facts and figures plus the latest release of the FEDIAF Nutritional Guidelines.
- Ongoing promotion of the three self-regulation codes which are integral to FEDIAF – Safety Guide, Good Labelling Practice & Nutrition.
- Development of a crisis management tool for members, including a library of FAQs on many pet food topics popular in the media. This is available in the members section of the website.
- FEDIAF Nutritional Guidelines benefited from a complete makeover and were launched at ESVCN (European Society of Veterinary & Comparative Nutrition) Munich, September 2018.
- The FEDIAF AGM, the association's flagship event, has been revitalised with a new format, including a new CEO Forum, which launches in 2019.
- Developed a refreshed and more dynamic website.

PRESS RELEASE

EU and Member States endorse the revised FEDIAF Code of Good Labelling Practice for Pet Food

With the assessment of the FEDIAF Code of Good Labelling Practice for Pet Food by the EU Standing Committee for Animal Nutrition, the FEDIAF Code receives official recognition as a practical tool for industry and authorities for guidance on how to label pet food products – for the benefit of pet owners, for a level playing field within industry and for control authorities.

Brussels, November 2018 – Based on EU Regulation 767/2009 on the Marketing and Use of Feed from 2009, the first edition of the FEDIAF Code of Good Labelling Practice was already endorsed a first time by the EU and Member States back in 2011.

Following modifications in the EU Regulation and numerous suggestions for improvements of the Code from stakeholders, particularly constructive from Member States, FEDIAF developed a 70-page revised version of the Code.

The FEDIAF Code clarifies questions such as: How to label ingredients or additives? Which consumer-friendly terms should be used? What stands behind the legal terms "meat and animal derivatives" on the label? How are concentrated, dried ingredients mentioned on the label? Is it allowed to highlight functional health benefits of pet food products? How do labelling rules apply to online trade and promotions?

The EU Regulation lays down key labelling requirements for pet food – however, these need explanation, interpretation, examples and clarifications, on how these work in practice. Instead of having different interpretations of labelling rules in the 28 EU Member States, the Code provides thereby clear guidance leading to better and harmonised labelling throughout the EU.

A large section of the Code is dedicated to explaining how to make product claims and



PRESS RELEASE

FEDIAF presents work to European Pet Food Industry in Prague

In the Nordic Pet Food Seminar in Prague, the Deputy Secretary General of the European Pet Food Federation (FEDIAF) spoke about the three pillars of self- and co-regulation underpinning the industry and their role in harmonising the enforcement of EU regulations to ensure safe and sustainable pet food.

Stockholm/Prague, October 2018 – There are more than 50 EU laws that apply to pet food – these cover all aspects of the pet food production cycle from the ingredients that can be used to the information which must be on the pet food label. FEDIAF continuously cooperates with the EU and national authorities to keep these harmonised and up-to-date based on the latest science and regulatory developments. János Takács said during his speech at the 4th Nordic Pet Food Seminar in Prague.

The important pet food sector gathers pet food manufacturers, ingredient suppliers and researchers of innovation and innovation from across Europe. Each explained "the innovation has been building on its excellent track record in terms of safety, innovation and responsible through three pillars of self- and co-regulation: the Nutritional Guidelines, the Good Manufacturing Practice Code and the Labelling Code."

Revised approach to regulations
In the first pillar of self- and co-regulation, the 2018 version of the Nutritional Guidelines for Cat and Dog Food was presented to representatives from the pet food industry. The document serves as a practical guide for cat and dog food manufacturers and sets essential requirements, benchmarked against values for use by the whole industry. "Being especially important with the help of a Scientific Advisory Board composed of European pet nutritionists from universities, and National Laboratories are the reference documents for producing complete pet food," Takács said.

The FEDIAF Good Manufacturing Practice Code is the second pillar. This guide summarizes the requirements for pet food manufacturers to set up a plan to plan pet food safety management systems in order to produce safe pet food.
The third pillar is the FEDIAF Labelling Code that covers information on product use, control and enforcement, recall and marketing and provides clear rules and examples for product claims. "All labelling requirements comply strictly with what the law requires and in exceptional situations, that take into account practical guidelines on how labelling requirements should be applied and implemented in order to ensure a level playing field for manufacturers of pet food companies," Takács explained.

Free download



FACTS & FIGURES 2018 European Overview

Estimated number of European Union households owning at least one pet animal	80 million households
Estimated percentage of European households owning at least one cat or one dog	EU: Cats 29%, Dogs 20% Europe: Cats 29%, Dogs 24%
Number of pet food producing companies	132 pet food producing companies 300 production plants (incl.)
Estimated Employment	Direct employment pet food industry: 186,000 Indirect employment: 362,000
Annual sales of pet food products	Volume: 8.8 million tons Revenue: € 21 billion
Annual value of pet related products and services	€ 5.5 billion accessories € 10 billion services Total: € 15.5 billion
Annual growth rate of the pet food industry (average value over the past 3 years)	2.5%



The pet sector in Europe in 2017



A recent report by FEDIAF, the association of the European pet food industry, states that 80 million households in the European Union owned at least one pet during last year. According to the report, 132 manufacturers of pet food produced around 8.8 million tonnes of pet food in approximately 300 factories. FEDIAF estimates the annual growth rate of the pet food industry at two per cent, an average value over the last five years. With regard to the pet population, FEDIAF reports that last year roughly 69.3 million dogs and 74.4 million cats lived in the European Union, along with 24.4 million birds and 21.7 million rabbits and other small animals.

Photo: Pixabay.com

FACT SHEET



The benefits of commercially prepared pet food



FACT SHEET



Can I feed dog food to my cat?



Cats and dogs are different!

Dog and cat food are formulated differently because dogs and cats have different nutritional needs. Complete and balanced pet food provides all the nutrients required in the correct ratio for the pet.

Dog food provides all the nutrients a dog needs to stay healthy, but they are not formulated to provide the additional nutrients that cats need in their diet. Although cats and dogs belong to the same order Carnivora together with species like bears or Giant pandas, the dog's feeding behavior is omnivorous, while the cat is a true carnivore. This means that cats must have certain nutrients in their diet that are only found in animal-based ingredients.

Taurine
Taurine is another amino acid that is distributed throughout most body tissues. Taurine is important for healthy functioning of the heart, retina, bile fluid and certain aspects of reproduction.

Protein
Cats must eat preformed taurine and since taurine is not found in plants, cats must consume animal-based ingredients to obtain it. Unlike cats, in the absence of dietary taurine, dogs can still be able to manufacture taurine from

Mechthild Exner-Herforth succeeds Marinus Pannevis



At the last annual general meeting of the European Pet Food Industry Association (FEDIAF), Mechthild Exner-Herforth, vice-president of corporate affairs at Mars Petcare Europe, was elected as the new president for a term of two years. She succeeds Marinus Pannevis, who had occupied the post since 2016.

Mechthild Exner-Herforth pledged to work for the good of the pet food industry and pets. She aims to focus on consolidating the good reputation of the industry, promoting free trade, informing the public about the benefits of commercially produced pet food and achieving successful self-regulation of the industry. She will also continue with the restructuring of FEDIAF.

Mechthild Exner-Herforth has worked in the pet food industry for almost 30 years.

Why is prepared pet food so popular?

- Convenient
- Variety
- Cost effective
- Pet satisfaction
- Safety

What does prepared pet food deliver?

- They provide the correct amount, balance and availability of nutrients to sustain physical and mental health and activity
- Sufficiently formulated to allow the animal to meet its nutritional requirements by consuming the food offered.
- Tailored (pastorally) to ensure the food is safely consumed, since an unbalanced meal has no nutritional value. Reliability of the food is important as feeding one should be a rewarding experience for both the owner and the pet which reinforces the bond between a dog or cat and its owner.
- By utilizing quality methods, meat and plant-based ingredients that originate from the production of human food, prepared pet food provides a sustainable source of balanced nutrition in an environmentally sustainable and responsible manner.

THE EUROPEAN PET FOOD INDUSTRY

Pet food industry fact sheets

FEDIAF fact sheets cover a wide range of pet food and nutrition topics. Our highly regarded in-house use based on experts. They cover a wide range of pet food and nutrition topics including additives and pet biotechnology.

Serving pets

ABOUT US

The European pet food industry provides a range of carefully prepared products to help ensure long, healthy and active lives of million pets in Europe, which are cared for in around 80 million pet keeping households.

LATEST NEWS

Free expert advice on pet nutrition
28 January 2018
PRESS RELEASE
Do you know the difference between complete and complementary pet food? What animal based ingredients are permitted...

Guide to Good Practice for the Manufacture of Safe Pet Foods

Nutritional Guidelines

For Complete and Complementary Pet Food for Cats and Dogs

February 2018

December 2018

FEDIAF Governance and structure

FEDIAF is the trade body representing the European pet food industry. We work with our members and collaborate with authorities, regulators and academics to ensure favourable conditions for the supply of safe, nutritious and palatable products.

We work through a committee structure and the Secretariat works closely with the Communication Working Group and the Executive Committee – reporting to the General Assembly.

The Executive Committee and the General Assembly are chaired by the FEDIAF President, elected every two years. FEDIAF President June 2018 - June 2020 is Mechthild Exner-Herforth.



Mechthild Exner-Herforth,
President FEDIAF
(2018 – 2020)

Mechthild Exner-Herforth has been working in the pet food industry for almost 30 years. She is Vice President of Corporate Affairs at Mars Petcare Europe where she has spent her entire career. She has been active in pet food trade associations since 2006, both at German and European level. Most recently, she served as Co-Chair of the FEDIAF Review Committee.

Our Review Committee – led by two co-chairpersons to coordinate the working groups and to give political leadership and guidance – looks at:

- Additives and Undesirable Substances
- Feed Hygiene and Safety
- Product Communication
- Nutritional & Analytical Science
- Feed Materials and Trade
- Environment and Sustainability
- Particular Nutritional Purposes
- BREF

We are supported by the National Associations (TASAG – Trade Associations Secretaries Action Group).



Thomas Meyer,
Secretary General, FEDIAF
(1997 – present)

Thomas studied law in Bonn (Germany) and London (United Kingdom) with a specialisation in International and European Law. 1988-1989 he was a research assistant at the British House of Commons in London. After a brief activity in a German law firm he moved to Brussels to join the Brewers of Europe, the European Trade Association of the brewing industry, as Deputy Secretary General. Since 1997 he has been Secretary General of FEDIAF.



Julien Täieb,
Deputy Secretary General, FEDIAF
(2014 – present)

Julien is a French lawyer by training (University of Aix-Marseille) with an additional Master in EU Law. 2003-2005 he was legal advisor at the European Commission to then join the EU farm feed federation FEFAC (2006-2010) as the European Affairs Manager. He held several responsibilities at the EU agriculture commodities traders associations (COCERAL, UNISTOCK) from 2010 to 2013. He joined FEDIAF in 2014 as Regulatory and Technical Affairs Manager and has subsequently been appointed Deputy Secretary General.

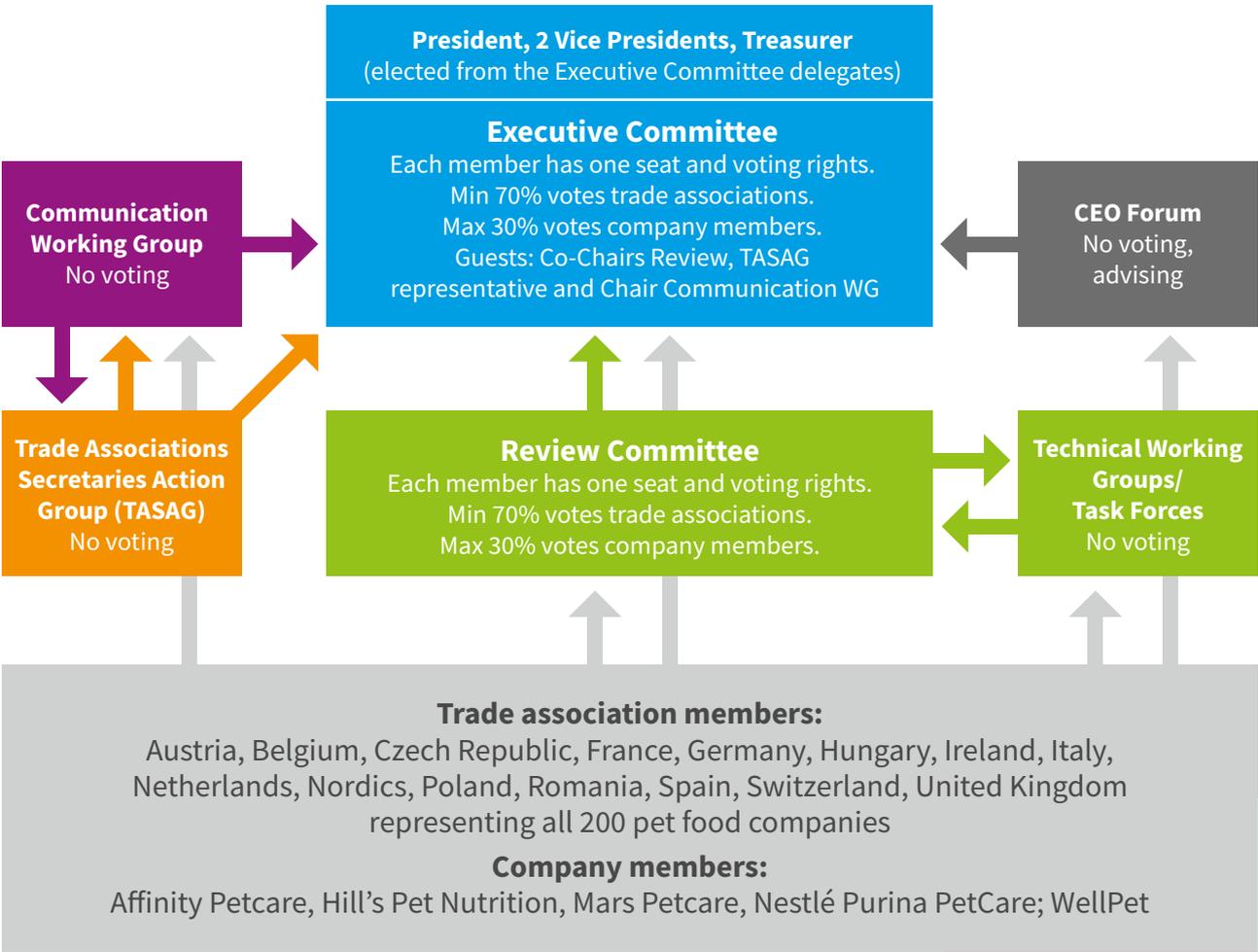


Jakub Rusek,
Policy Adviser, FEDIAF
(2018 - present)

Jakub Rusek studied biology in Brno (Czech Republic), Bari (Italy) and Munich (Germany) and EU studies in Brussels. He obtained his PhD from Ludwig Maximilian University of Munich (LMU). In Brussels, he held several traineeships and positions in science-policy interfaces (such as the Brussels Office Coordinator at EASAC, trainee in the European Parliament). Before joining FEDIAF in 2018, he worked in DG Environment (European Commission), dealing with waste policy.

GENERAL ASSEMBLY
 Min 70% vote from trade association: 60% of their total & 55% of their number
 Max 30% votes from direct company members

FEDIAF SECRETARIAT



FEDIAF Committees and Working Groups

Executive Committee

Chair: Mechthild Exner-Herforth – Mars Petcare
Gratziela Bahaciu – ARPAC
Robin Balas – Co-Chair Review Committee
Pascale Bensman – Co-Chair Review Committee
Christophe Carlier – FACCO
Josep Crusafont – Affinity Petcare
Irina Derksen – Hill's Pet Nutrition
Terkel Due – Nordics
Urs Eberhard – VHN
Hermann Habe – ÖHTV
Lajos Hanzel – HPFA
Kathy Heungens – BEPEFA
Robert Kaczmarek – POLKARMA
Peter Kersh – PFMA
Katrin Langner – TASAG representative
Lina Lopez – WellPet
Clotilde Marchand – Nestlé Purina PetCare
Pietro Molteni – ASSALCO
Thomas Neumann – IVH
Annet Palamba – NVG and Chair of the Communication Working Group
Victor Romano – ANFAAC

Review Committee

Co-Chair: Pascale Bensman – Nestlé Purina PetCare
Co-Chair: Robin Balas – Royal Canin
Izabella Balanyiné – HPFA
Josep Crusafont – Affinity Petcare
Irina Derksen – VHN
Åsa Dufva – Nordics
Pierre Jaouen – FACCO
Robert Kaczmarek – POLKARMA
Mieke Lammens – BEPEFA
Karen Elizabeth Linley – Mars Petcare
Melinda Magdus – HPFA
Mariska Niesten – NVG
Anita Pachatz – ÖHTV
Monika Prenner – PFMA
Nicole Rabehl – IVH
Victor Romano – ANFAAC
Alberto Setti – ASSALCO
Yvan Tomaselli – Nestlé Purina PetCare

Trade Associations Secretaries Action Group (TASAG)

Chair: Thomas Meyer – FEDIAF
Antonella Baggini – ASSALCO
Gratziela Bahaciu – ARPAC
Benita Beekhof – NVG
Michael Bellingham – PFMA
Aurélie Bynens, FACCO
Santiago de Andres - ANFAAC
Stefan Emmenegger – VHN

Magda Hrabcova– SVPDZ
Lisa Jöchinger – ÖHTV
Katrin Langner – IVH
Maciej Przewdziaak – POLKARMA
Miriam Ryan – PFAI
Gyöngyi Szórádi – HPFA
Liesbeth Verheyen – BEPEFA

Communication Working Group

Co-Chair: Annet Palamba – Hill's Pet Nutrition
Co-Chair: Nicole Paley – PFMA
Aurélie Bynens – FACCO
Greta Drumstaité – Nestlé Purina PetCare
Kathrin Feldbrügge – nolte PR
Clémentine Jean-Philippe – Nestlé Purina PetCare
Dieter Meyer – Vitakraft
Detlev Nolte – nolte PR
Gyöngyi Szórádi – HPFA

Additives and Undesirable Substances Working Group

Chair: Matthew Elliott – Mars Petcare
Helen Clegg – Mars Petcare
Geoffrey Daniel – Royal Canin
Irina Derksen – Hill's Pet Nutrition
Fanny Dumont – Royal Canin
Gerd Grossheider – Gimborn
Kounawit Heng – Nestlé Purina PetCare
Pierre Jaouen - Sopral
Jerome Naar – Royal Canin
Stéphane Peeters – Spectrum Brands
Victor Romano – Affinity Petcare
Andreas Thoben – Vitakraft
Martin van Bohemen– Hill's Pet Nutrition
Paula Wartelski – Nestlé Purina PetCare
Dagmar Zähringer – Nestlé Purina PetCare

Feed Hygiene and Safety Working Group

Chair: John Williams – Nestlé Purina PetCare
Philippe Claude Bernard – Mars Petcare
Sebastien Joye – Mars Petcare
Dominique Poirier– Nestlé Purina PetCare
Samantha Taina – EffeEffe
Karin Tiemann – Vitakraft

BREF Task Force

Chair: Christian Schünemann – Consultant
Henning Beckmann – IVH
Benita Beekhof – NVG
Pascale Bensman – Nestlé Purina PetCare
Nathalie Bonnet – Nestlé Purina PetCare
Aurélie Bynens – FACCO
Christophe Crouzet – Mars Petcare

G rard Darlot – Neodis
Pablo Hervas – ANFAAC
Sarah Hormozi – PFMA
Jerome Huez – Mars Petcare
Lynn Insall – PFMA
James Lawson – GA Pet Food Partners
Lana Morgan – PFMA
Tanguy Odin – Royal Canin
Martin van Bohemen – Hill’s Pet Nutrition

PARNUTs Task Force

Chair: Robin Balas – Royal Canin
Laurence Colliard – Nestl  Purina PetCare
Lisa Conboy – Nestl  Purina PetCare
Irina Derksen – Hill’s Pet Nutrition
Christine Huggett – Spectrum Brands
Isabelle Jeusette – Affinity Petcare
Karin K hn – Bosch Tiernahrung
Isabelle Leriche – Virbac
Francis Pastoor – Dechra Veterinary Products
Ingrid Van Hoek – Royal Canin
Ariane Wehrmaker – Saturn Petcare

Nutrition and Analytical Science Working Group

Chair: Thomas Brenten – Royal Canin
Iveta Becvarova – Hill’s Pet Nutrition
Catherine Bogaert – Neovia
Jean Christophe Bouthegourd – Nestl  Purina PetCare
Lisa Conboy – Nestl  Purina PetCare
Lisa Eggink – Bewital
Petra Hellweg – Mars Petcare
Svanneke Hendriks – Nestl  Purina PetCare
Christine Huggett – Spectrum Brands
Isabelle Jeusette – Affinity Petcare
Karin K hn – Bosch Tiernahrung
Delphine Moniot – Royal Canin
Francis Pastoor – Dechra Veterinary Products
Galyna Rybachuk – Nestl  Purina PetCare
Libby Sheridan – Nestl  Purina PetCare
Celina Torre – Affinity Petcare
Ingrid Van Hoek – Royal Canin
Hilde Vanwalleghem – Fides Petfood
Ariane Wehrmaker – Saturn Petcare

Feed Materials and Trade Working Group

Chair: Monika Prenner – Nestl  Purina PetCare
Robin Balas – Royal Canin
Aur lie Bynens – FACCO
Irina Derksen – Hill’s Pet Nutrition

Martina Gerndt – Mars Petcare
Aline Hartman – Partners in Pet Food
Lynn Insall – PFMA
Gerard Ketel – Hill’s Pet Nutrition
Sabine Mladenovic-Spiss – Ospelt
Stephane Peeters – Spectrum Brands
Mindaugas Rupsys – Mars Petcare
Miriam Ryan – PFAI
Alfred Schloesser – Nestl  Purina PetCare
Sarka Steflova – Hill’s Pet Nutrition

Product Communication Working Group

Chair: Victor Romano – Affinity Petcare
Michael Alvermann – Saturn Petcare
Jean-Christophe Bouthegourd – Nestl  Purina PetCare
Eva Ca as – Nestl  Purina PetCare
Irina Derksen – Hill’s Pet Nutrition
Francisco Gisbert – Affinity Petcare
Xinxin Liu – Royal Canin
Ines M nzelfeld – Mars Petcare
Stephane Peeters – Spectrum Brands
Monika Prenner – Nestl  Purina PetCare
Victor Romano – Affinity Petcare
Miriam Ryan – PFAI
Marina Stoeckel – Saturn Petcare
Willeke Stroucken – Partners in Pet Food
Andreas Thoben – Vitakraft
Klaus Tesch – Saturn Petcare
Luisa Vierbaum – Rondo Food

Environment and Sustainability Working Group

Chair: Pascale Bensman – Nestl  Purina PetCare
Aur lie Bynens – FACCO
Gert-Jan Krom – C&D Foods
Christian Sch nemann – Consultant, Mars Petcare
Ariane Wehrmaker – Saturn Petcare

FEDIAF Members



FEDIAF Members

FEDIAF has 15 members associations representing 18 countries. Since January 2018, and after a thorough review of our by-laws and internal regulations, FEDIAF now has also five company members (Affinity Petcare, Hill's Pet Nutrition, Mars Petcare, Nestlé Purina PetCare and Wellpet). Our mission is to be the collective credible and responsible voice for the industry.

Austria

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Denmark

Finland

Norway

Sweden

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FEDIAF Members

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Netherlands

NVG

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Poland

POLKARMA

Polish Pet Food Manufacturers' Association

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Romania

ARPAC

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Verband für Heimtiernahrung

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PFMA

The Pet Food Manufacturers' Association

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Affinity Petcare

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www.affinity-petcare.com/en

Hill's Pet Nutrition

Grabetsmattweg

4106 Therwil

Switzerland

www.hillspet.com

Mars Petcare

Eitzer Str. 215

27283 Verden

Germany

www.mars.com/global/about-us/locations#?continent=Europe

Nestlé Purina PetCare

Nestlé Purina PetCare Europe, Middle East, North Africa (EMENA)

Rue d'Entre-deux-Villes 10

Case postale 352

1800 Vevey

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www.purina.eu/

WellPet

WellPet Belgium BVBA

Leonardo da Vincilaan 19

MC Square

1831 Machelen, Diegem

Belgium,

www.wellpet.com/index.aspx

Glossary

BAT	Best Available Techniques in the Food and Drink Industries
BAT- AEL	Associated Emission Levels
BREF	Best Available Techniques Reference Document
DG SANTE	European Commission Directorate-General for Health and Food Safety
EFSA	European Food Safety Authority
ESVCN	European Society of Veterinary & Comparative Nutrition
FEDIAF	European Pet Food Industry Federation
GAPFA	Global Alliance of Pet Food Associations
HACCP	Hazard Analysis and Critical Control Points
IPPC SCP	Integrated Pollution Prevention and Control, Sustainable Production and Consumption
OIE	World Organisation for Animal Health
PARNUTs	Pet Foods with PARTICULAR NUTRITIONAL Purposes
PEF	Product Environment Footprint
PEFCRs	Product Environmental Footprint Category Rules
SAB	Scientific Advisory Board
SCoPAFF	Standing Committee on Plants, Animals, Food and Feed
TAB	Technical Advisory Board
TASAG	FEDIAF Trade Associations Secretaries Action Group
TSE	Transmissible spongiform encephalopathies



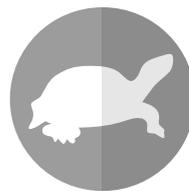
The European
Pet Food Industry

European Facts & Figures 2018

FACTS & FIGURES 2018

European Overview

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Annual value of pet related products and services	€ 8.5 billion accessories € 10 billion services Total: € 18.5 billion
Annual growth rate of the pet food industry (average value over the past 3 years)	2.5 %



Sources: Figures from FEDIAF and its member associations, pet food companies and estimations based thereupon when indicated
European Union/Europe: "European Union" includes the 28 Member States of the EU whereas "Europe" includes Member States of the Council of Europe

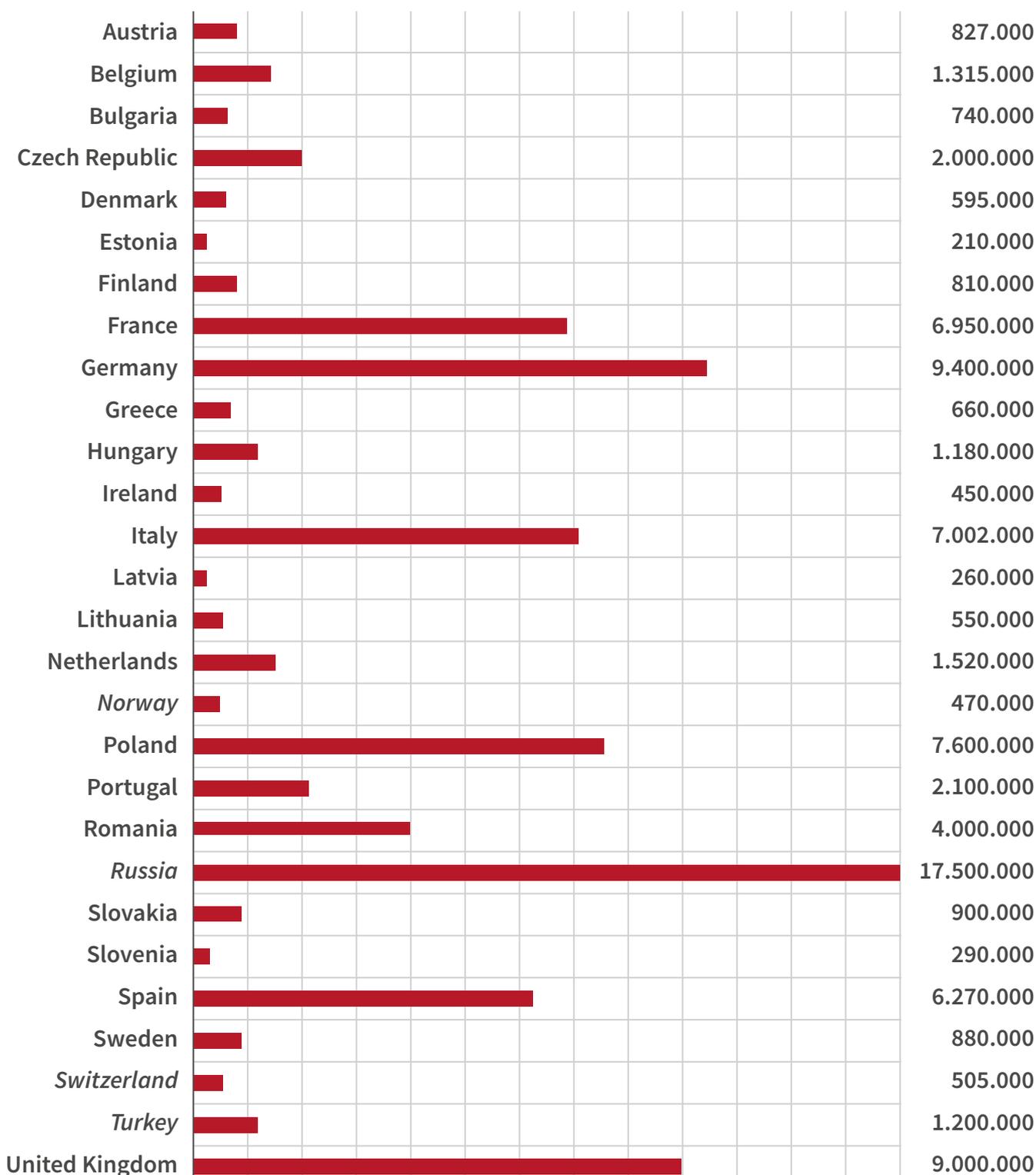
FACTS & FIGURES 2018

European dog population



Total European Union: 65.509.000

Total Europe: 85.184.000



Non EU Member States indicated with italics

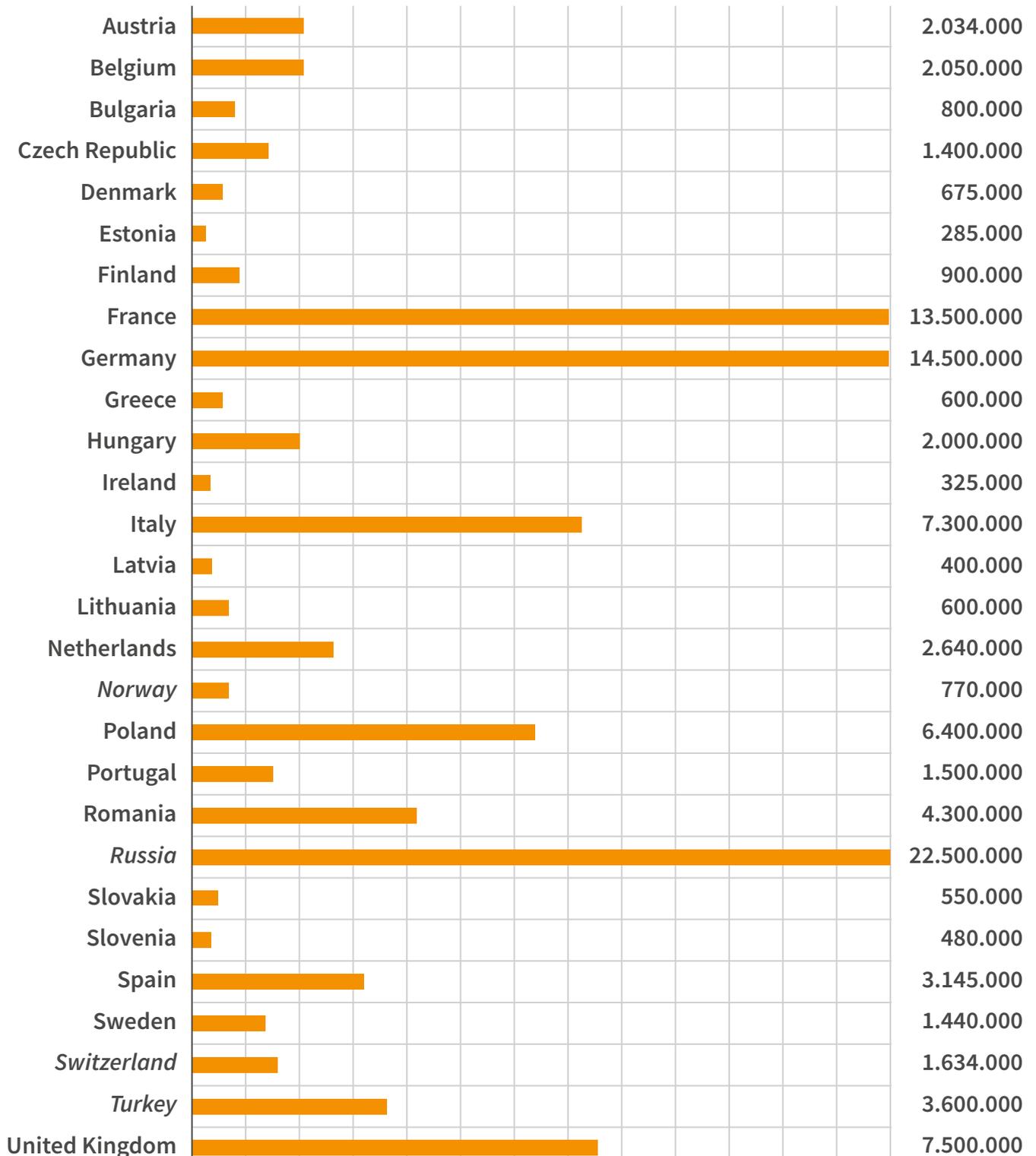
Sources: Figures from FEDIAF and its member associations, pet food companies and estimations based thereupon when indicated
 European Union/Europe: "European Union" includes the 28 Member States of the EU whereas "Europe" includes Member States of the Council of Europe

FACTS & FIGURES 2018

European cat population



Total European Union: 75.324.000
Total Europe: 103.828.000



Non EU Member States indicated with italics

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FACTS & FIGURES 2018

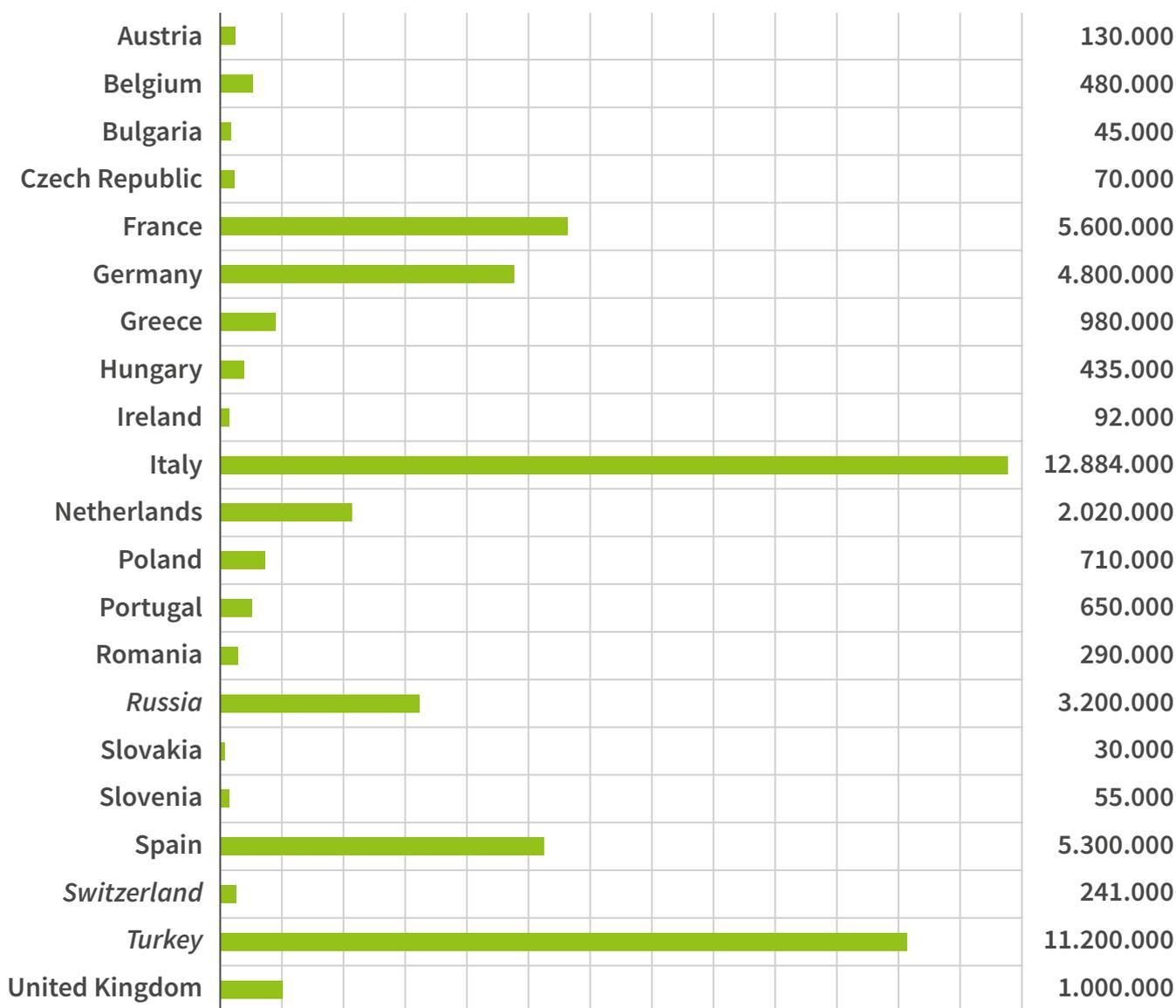
European ornamental bird population



Total European Union: 35.571.000

Total Europe: 50.212.000

(excl. Baltic States and Nordic Countries)



Non EU Member States indicated with italics

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FACTS & FIGURES 2018

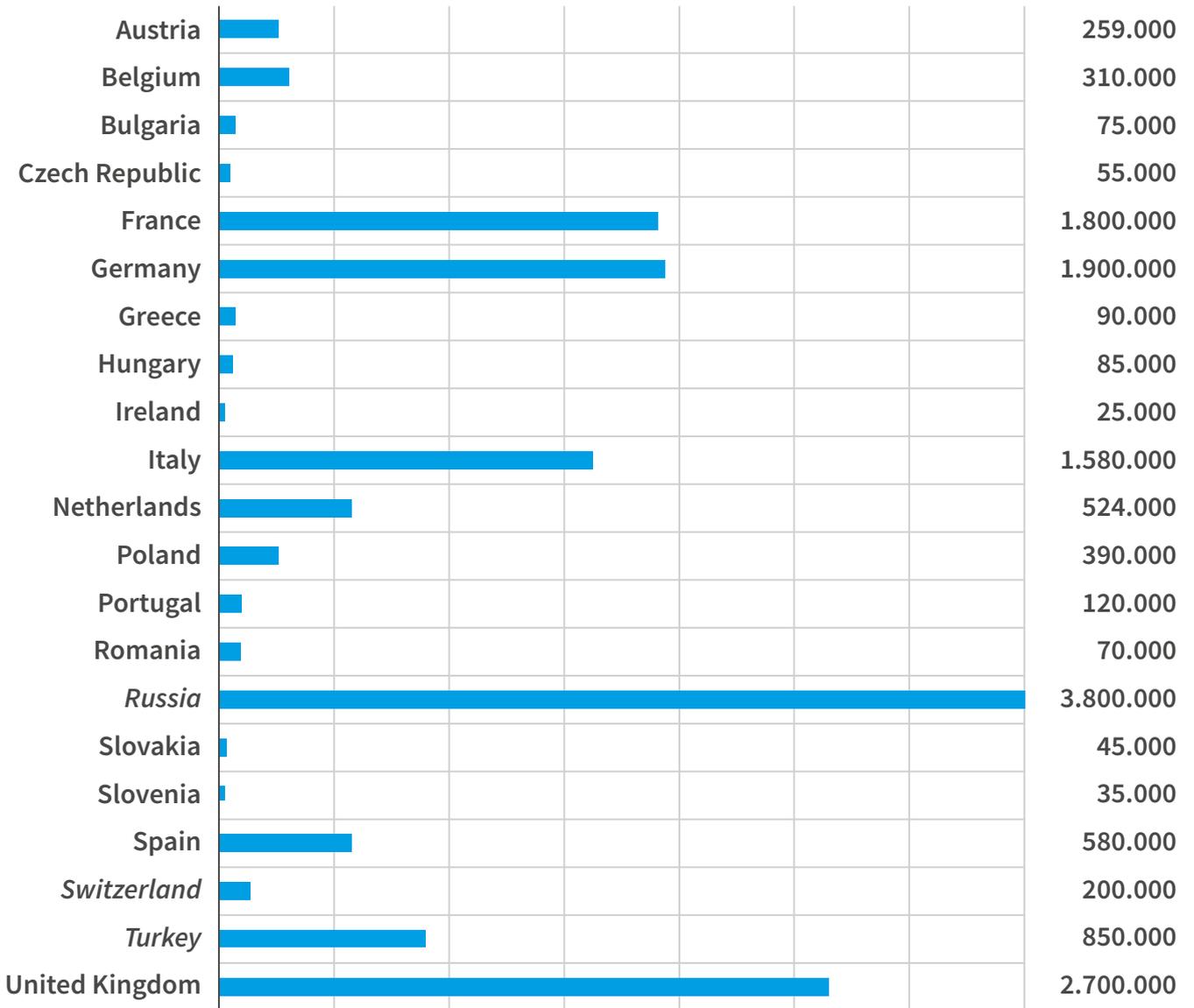
Estimated number of European aquaria



Total European Union: 10.643.000

Total Europe: 15.493.000

(excl. Baltic States and Nordic Countries)



Non EU Member States indicated with italics

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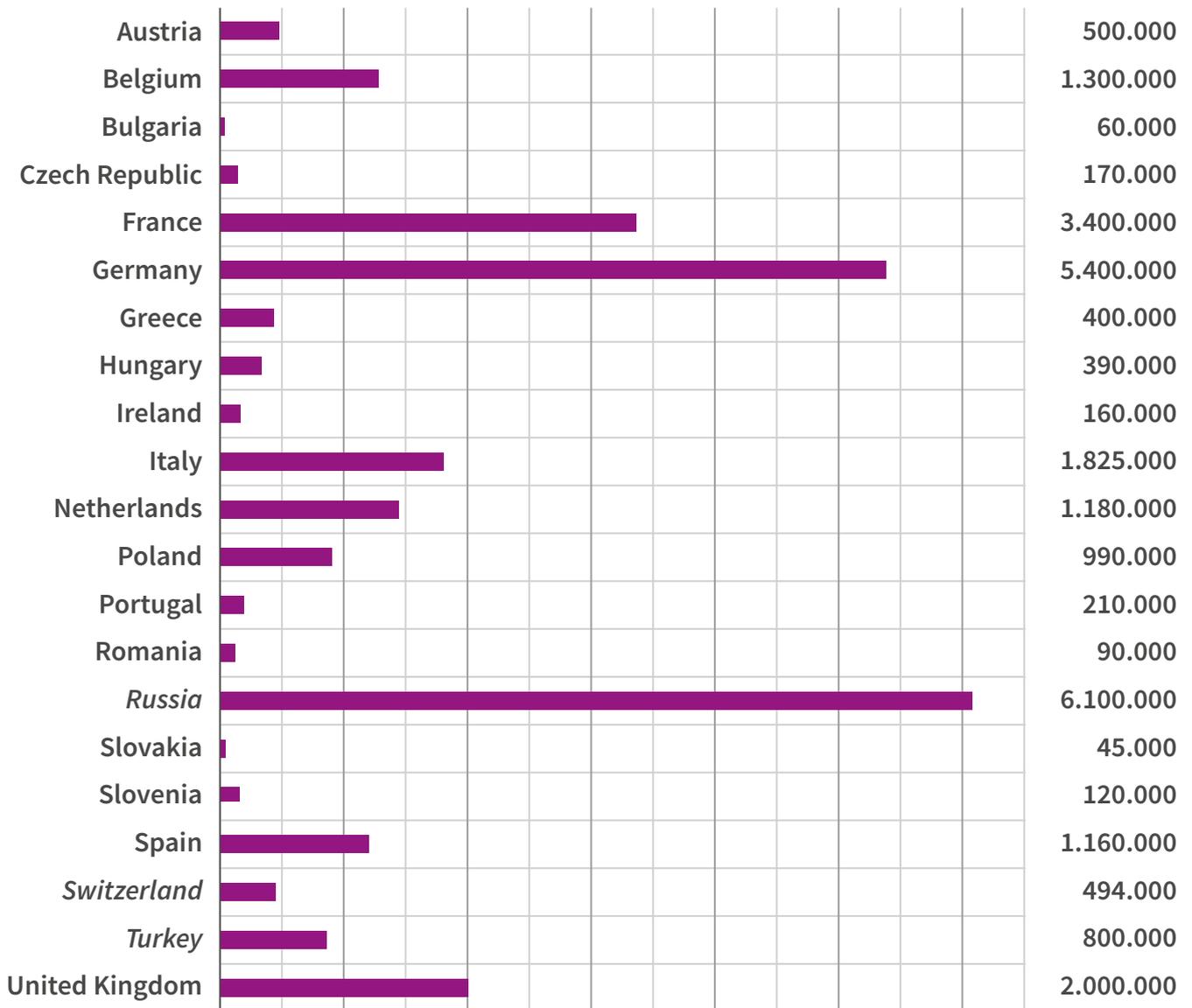
FACTS & FIGURES 2018

European small mammal population



Total European Union: 19.400.000
 Total Europe: 26.794.000

(excl. Baltic States and Nordic Countries)



Non EU Member States indicated with italics

Sources: Figures from FEDIAF and its member associations, pet food companies and estimations based thereupon when indicated
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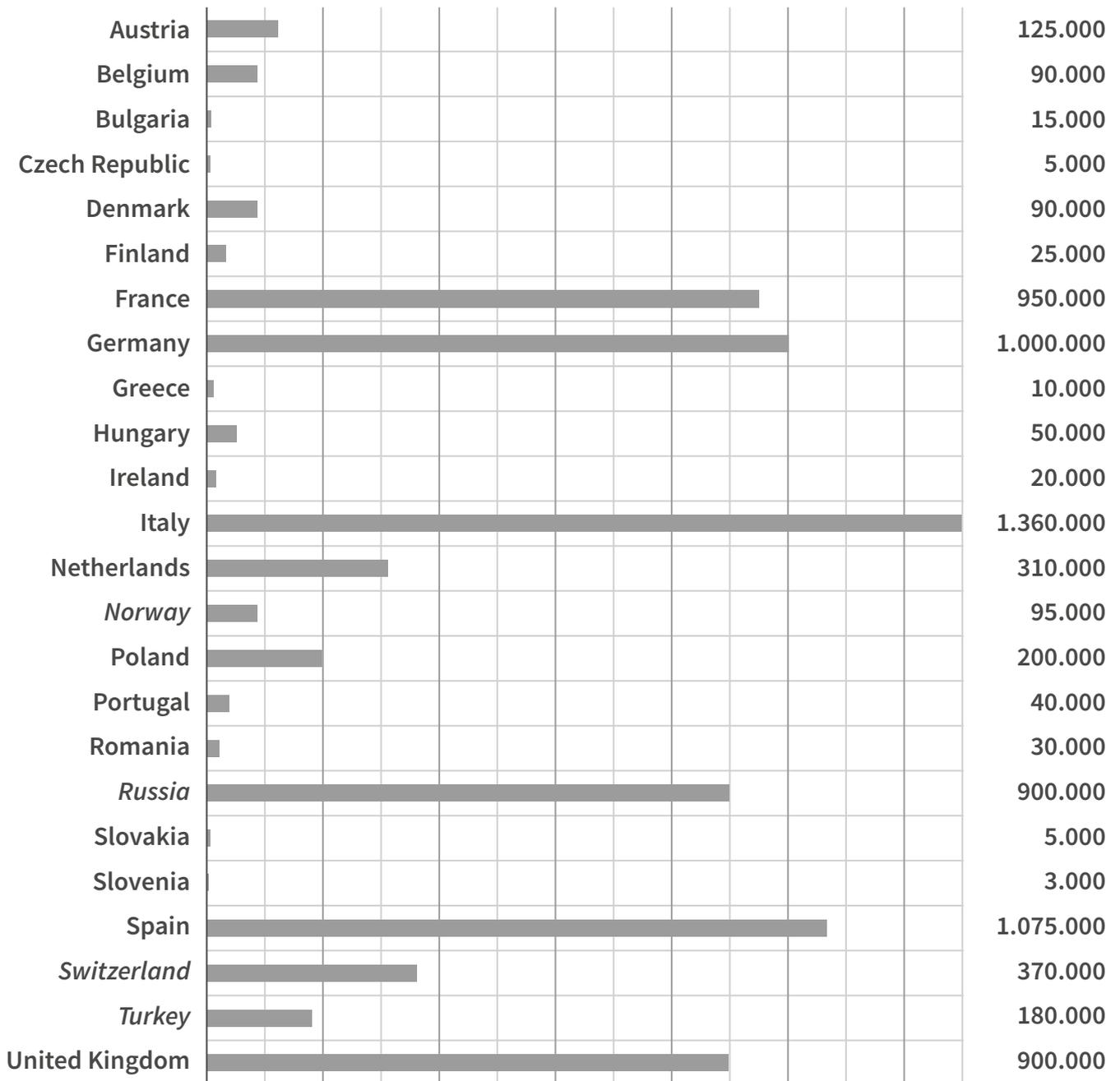
FACTS & FIGURES 2018

European reptile population



Total European Union: 6.303.000
Total Europe: 7.848.000

(excl. Baltic States and Sweden)



Non EU Member States indicated
with italics

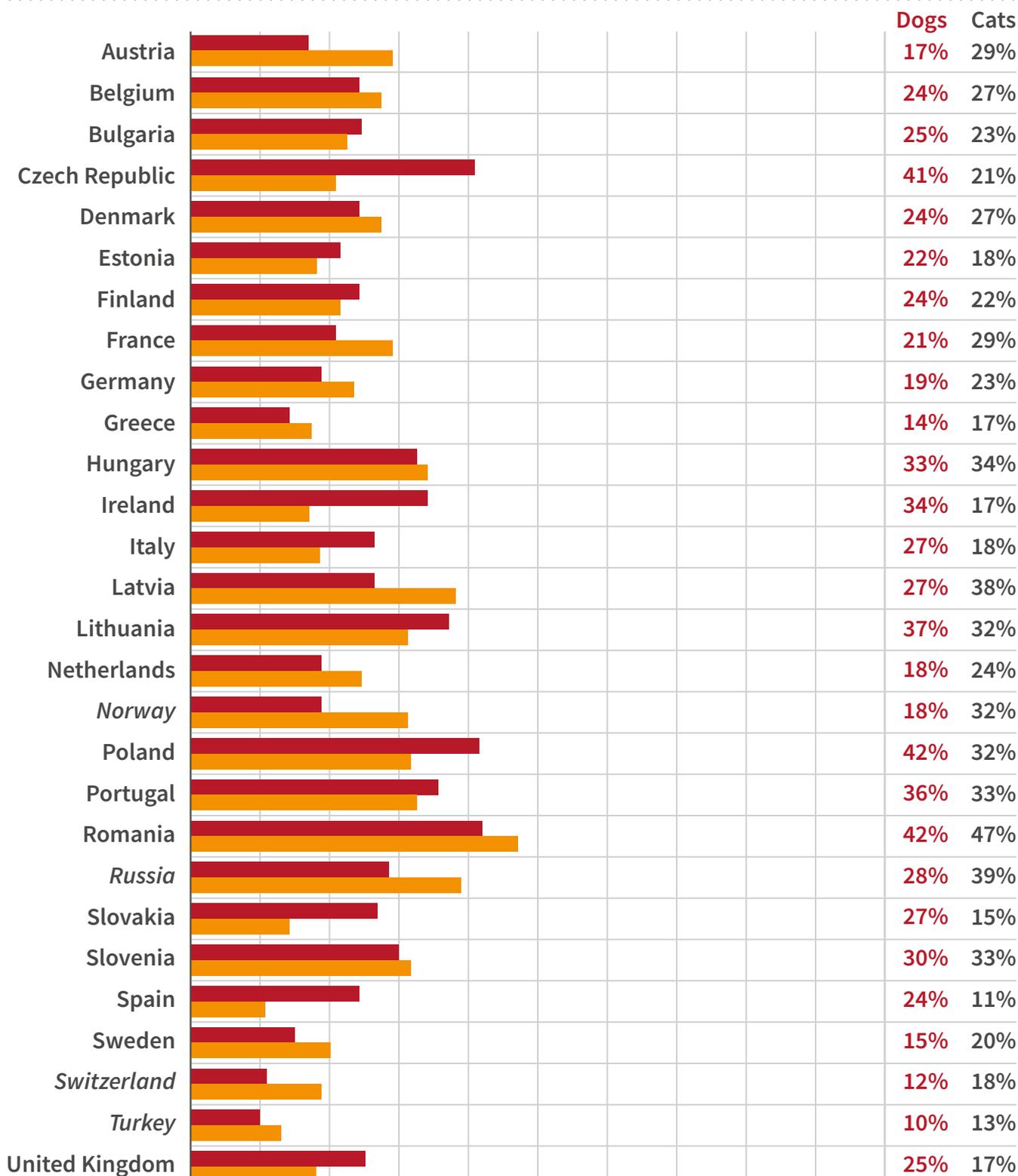
Sources: Figures from FEDIAF and its member associations, pet food companies and estimations based thereupon when indicated
European Union/Europe: "European Union" includes the 28 Member States of the EU whereas "Europe" includes Member States of the Council of Europe

FACTS & FIGURES 2018

Estimated percentage of ...



European households owning at least one cat or one dog



Non EU Member States indicated
with italics

Sources: Figures from FEDIAF and its member associations, pet food companies and estimations based thereupon when indicated
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FACTS & FIGURES 2018

European overview



Estimated number of European Union households owning at least one pet animal:

80 million households

Estimated percentage of European households owning at least one cat or one dog:

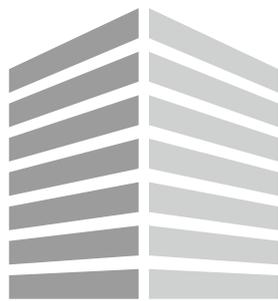
EU:
Cats 23%
Dogs 25%

Europe:
Cats 25%
Dogs 24%

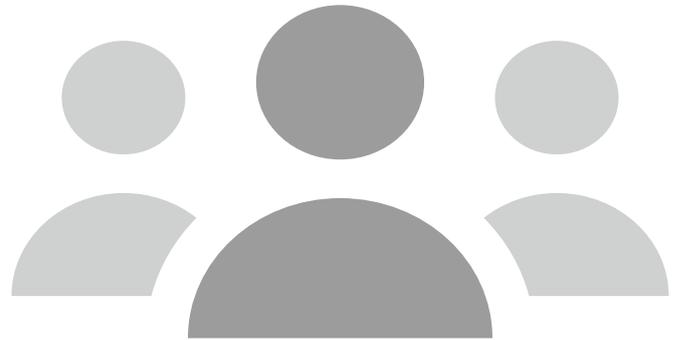


132 pet food companies

200 plants (est.)

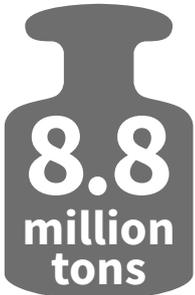


Employment



Est. direct employment:
100.000

Est. indirect employment:
900.000



Annual sales of pet food products:
Turnover: € 21 billion



Annual value of pet related products and services:

€ 8,5 billion accessories
€ 10 billion services
Total: € 18,5 billion



Top pets in Europe



Annual growth rate of the pet food industry (average value over the past 3 years)

2,5%

*excl. Baltic States and Sweden | ** excl. Baltic States and Nordic Countries | *** This corresponds to an estimated 300 million ornamental fish

FACTS & FIGURES 2018

Top pets in Europe

Cat



Total European Union: **75.324.000**

Total Europe: **103.828.000**

Dog



Total European Union: **65.509.000**

Total Europe: **85.184.000**

Bird



Total European Union: **35.571.000****

Total Europe: **50.212.000****

Small mammal



Total European Union: **19.400.000****

Total Europe: **26.794.000****

Aquarium

This corresponds to an estimated 300 million ornamental fish



Total European Union: **10.643.000****

Total Europe: **15.493.000****

Reptile



Total European Union: **6.303.000***

Total Europe: **7.848.000***

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 *excl. Baltic States and Sweden | ** excl. Baltic States and Nordic Countries



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June 2019

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The European
Pet Food Industry