



Annual Report 2022





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A message from the FEDIAF President

The two years in my role as president have passed by very quickly and the time has come to handover to my successor. Who could have thought, when I said ‘yes’ to becoming the next FEDIAF president at the end of 2019, that I wouldn’t preside over any live events during my term until the very last moment. I’m happy that our 2022 General Meeting, Congress and various internal meetings are expected to take place physically in Brussels.

Of course, the past two years have been marked by an unprecedented situation with the global pandemic impacting people and businesses all over the world. And after the many disruptions that this caused in the pet food industry supply chain, the next crisis arrived driven by the war in Ukraine which is again causing significant impacts on the availability of various raw materials or the rising cost of energy. The industry has proven its agility during the pandemic and also now we will do everything possible to ensure our pet family members will not be impacted by for instance shortages of certain raw materials. We do this in constructive cooperation with the European Commission and Member States with whom we discuss how to best tackle the complications this crisis is causing.

During my presidency, we’ve also seen a completely new secretariat team get into place and up to speed. In September 2020 Raquel Izquierdo de Santiago joined as Secretary General and Alice Tempel Costa as Technical Director and they have done an incredible job in emerging

themselves quickly in all the ins and outs of the pet food industry. About a year later Giulia Aluffi joined as Junior Communications and Policy Officer. And in March 2022, Katerina Alexopoulou joined the team as the new Scientific and Regulatory Affairs Policy Advisor.

I want to express a big thank you on behalf of all members to this amazing team. They have accomplished great results already in this short period of time and I’m looking forward to the time ahead.

My ‘thank you’ wouldn’t be complete without mentioning also the many company experts that are so important to our association. They dedicate their knowledge and valuable time to the entire industry so we can continue to supply safe, nutritious, and palatable pet food, sustainably while endorsing the important role of pets in our society.

You can read all of the details of what the various Working Groups of FEDIAF have been working on in this annual report and I’m sure you’ll agree with me again that together we’ve dealt with an impressive number of topics. I highly recommend you taking a moment to read the many key achievements of each Working Group.

Enjoy the read!

Annet Palamba

Introduction by FEDIAF Secretary General

Dear Members,

This Annual Report is released on the occasion of the 2022 Statutory Annual General Assembly of FEDIAF (23 June 2022), which, after two years of virtual gatherings, is finally taking place in person in Brussels to the delight of both members and the Secretariat!

The current report provides a snapshot of the “state of play” of the pet food industry and covers the key policy areas where FEDIAF has been actively involved in the last twelve months.

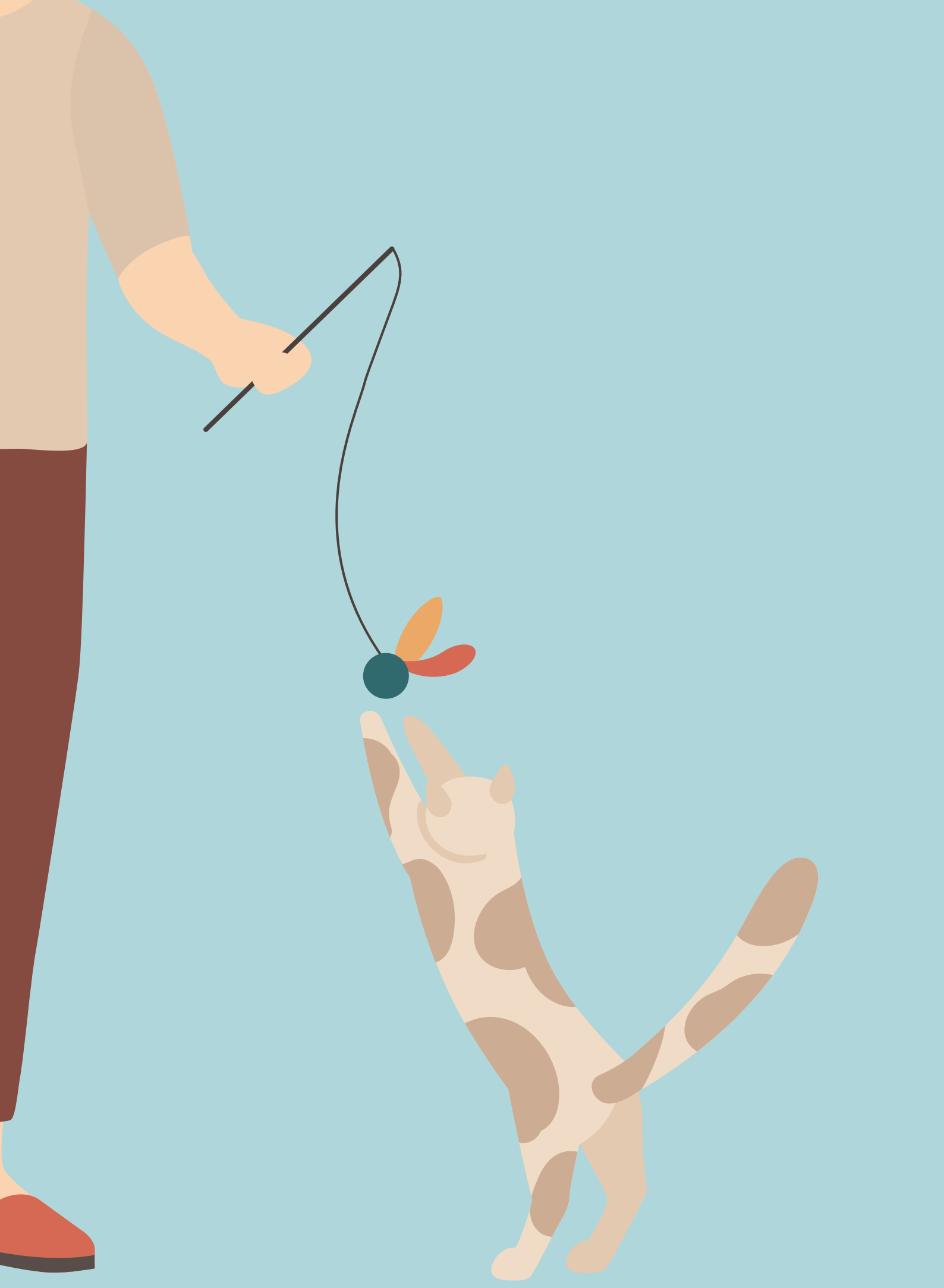
As the Covid-19 pandemic continued through 2021, and as 2022 has brought new global challenges, FEDIAF has continued to step up all efforts to keep supporting the pet food industry interests in Europe, and the promotion of the wide array of benefits that pets bring to society. Throughout the year, the experts of the various working groups covered an impressive variety of files, from technical to policy dossiers on topics such as nutrition, safety, analytical science, trade, labelling, environmental sustainability and more. At the same time, FEDIAF continues to reinforce its external communication, so

that the engagement with the relevant stakeholders, from policymakers to media and other European stakeholders, is clear and efficient. We are hopeful that the next twelve months will bring plenty of opportunities for networking and engagement with members and stakeholders alike.

We can be really proud of how FEDIAF continues its evolution in these ever-changing times, and in particular, I would like to thank the team for their professionalism and dedication in making sure that members are well assisted in all dossiers and that the concerns and challenges of our sector are heard and understood by the European institutions and our stakeholders.

Finally, I would like to sincerely thank the FEDIAF President, the members of the Executive and Review Committees, and by extension to all members, both national associations and private companies for their generosity, time and dedication, in supporting the efforts of the association to implement successfully all the activities for the benefit of the sector.

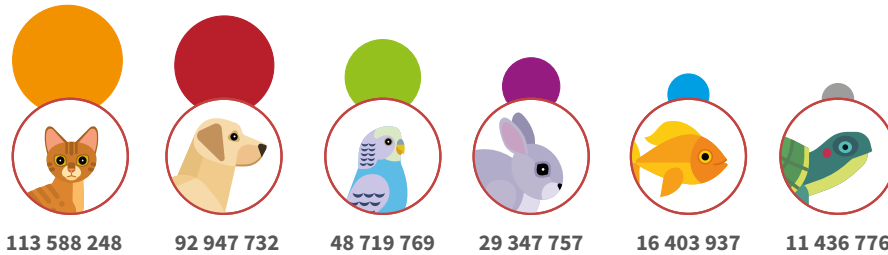
Raquel Izquierdo De Santiago



FACTS & FIGURES 2021

European Overview

Top pets in Europe



90

million households
(46% of all households)

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

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

Region	Cats	Dogs
EU	25%	25%
Europe	26%	25%



150 pet food companies

200 plants (est.)

10.2 million tons annual sales of pet food products
Turnover: **27.7 bn**

Employment

Est. direct employment: **110 000**
Est. indirect employment: **950 000**

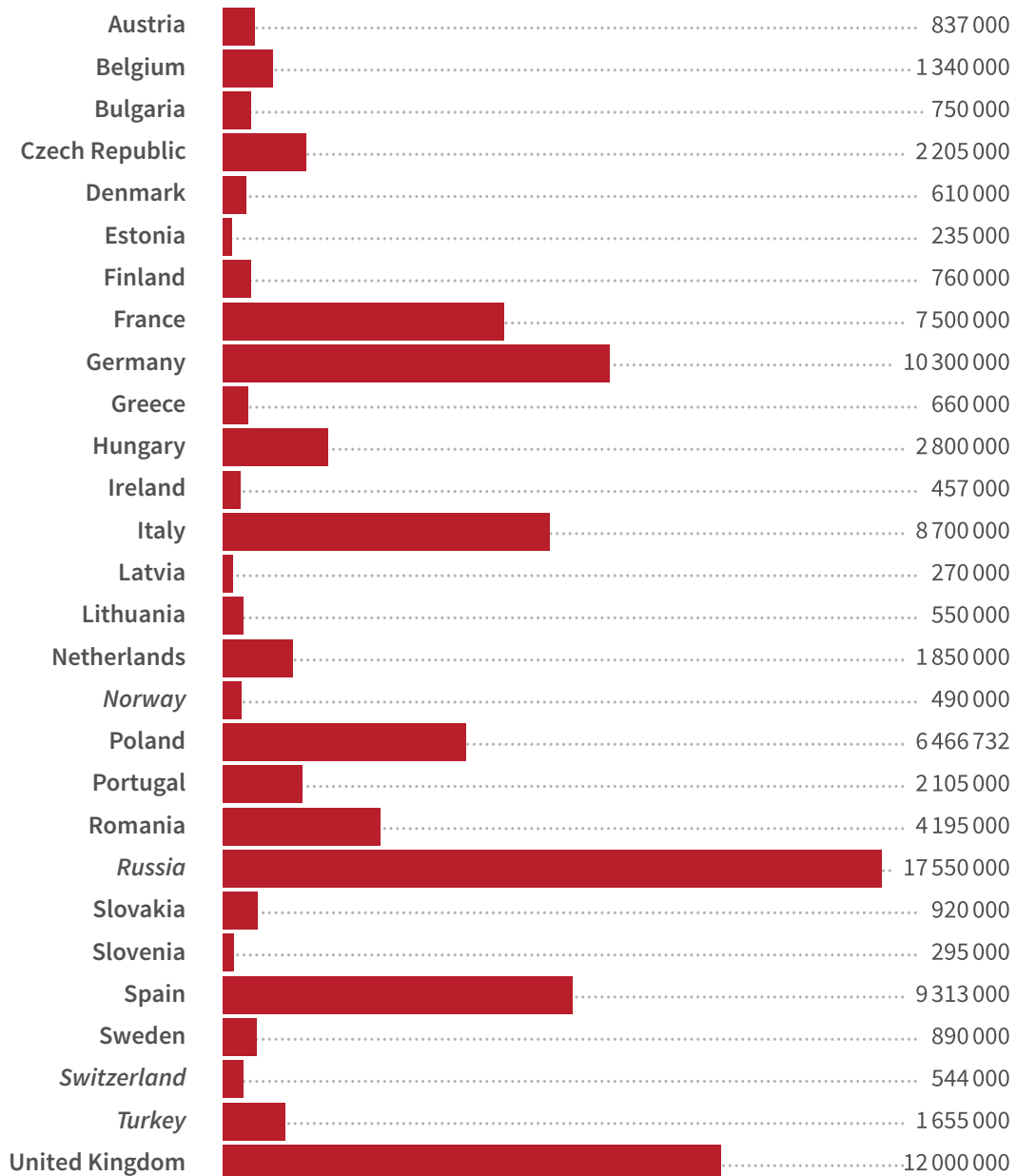
Annual growth rate of the pet food industry **3.1%**
(average value over the past 3 years)

Related services and products: **23.5 bn**
(9.5 accessories, 14 services)



FACTS & FIGURES 2021

European dog population



 **Total Europe : 92 947 732**

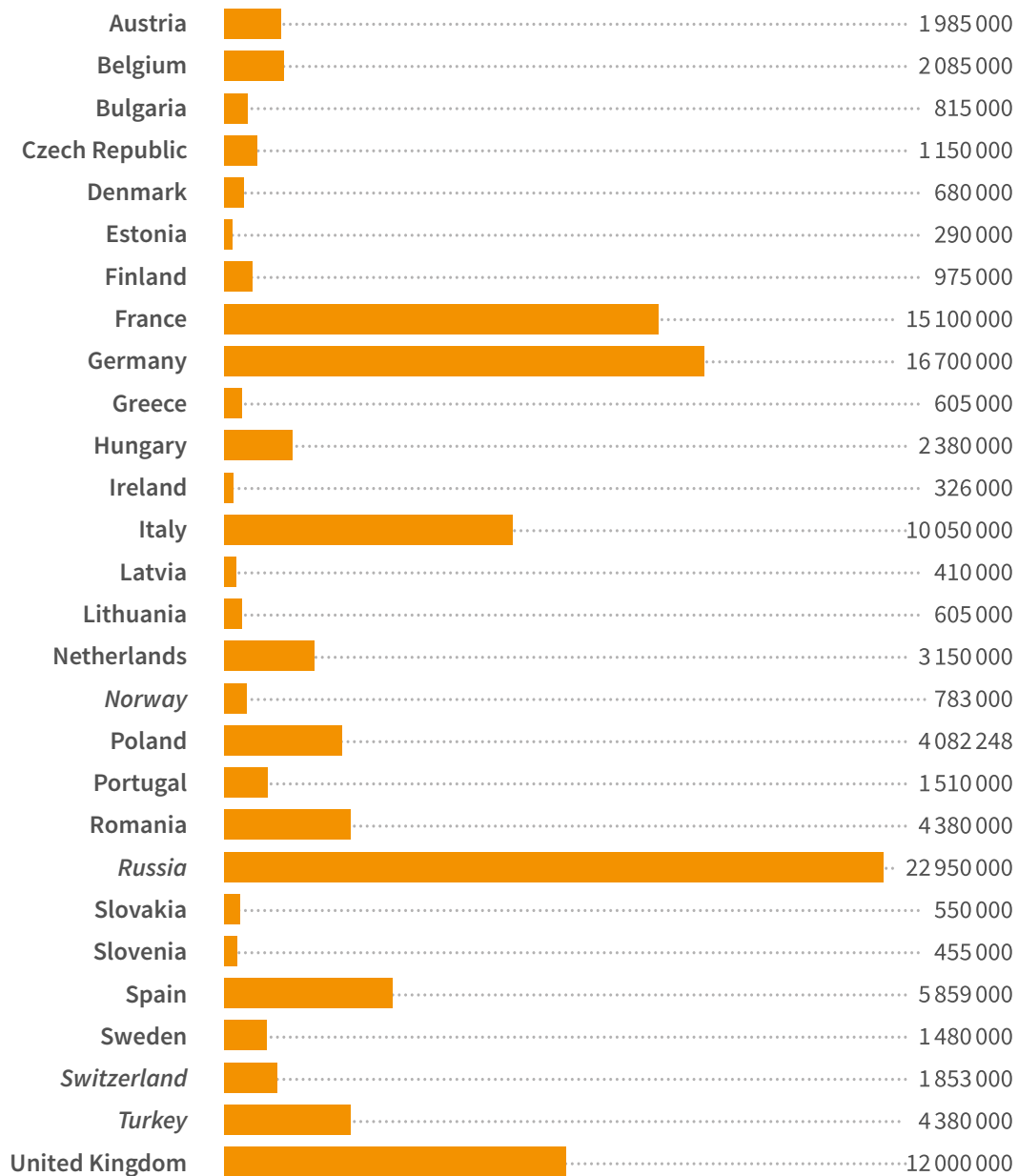
 **Total EU : 72 708 732**

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 2021

European cat population



Total Europe : 113 588 248



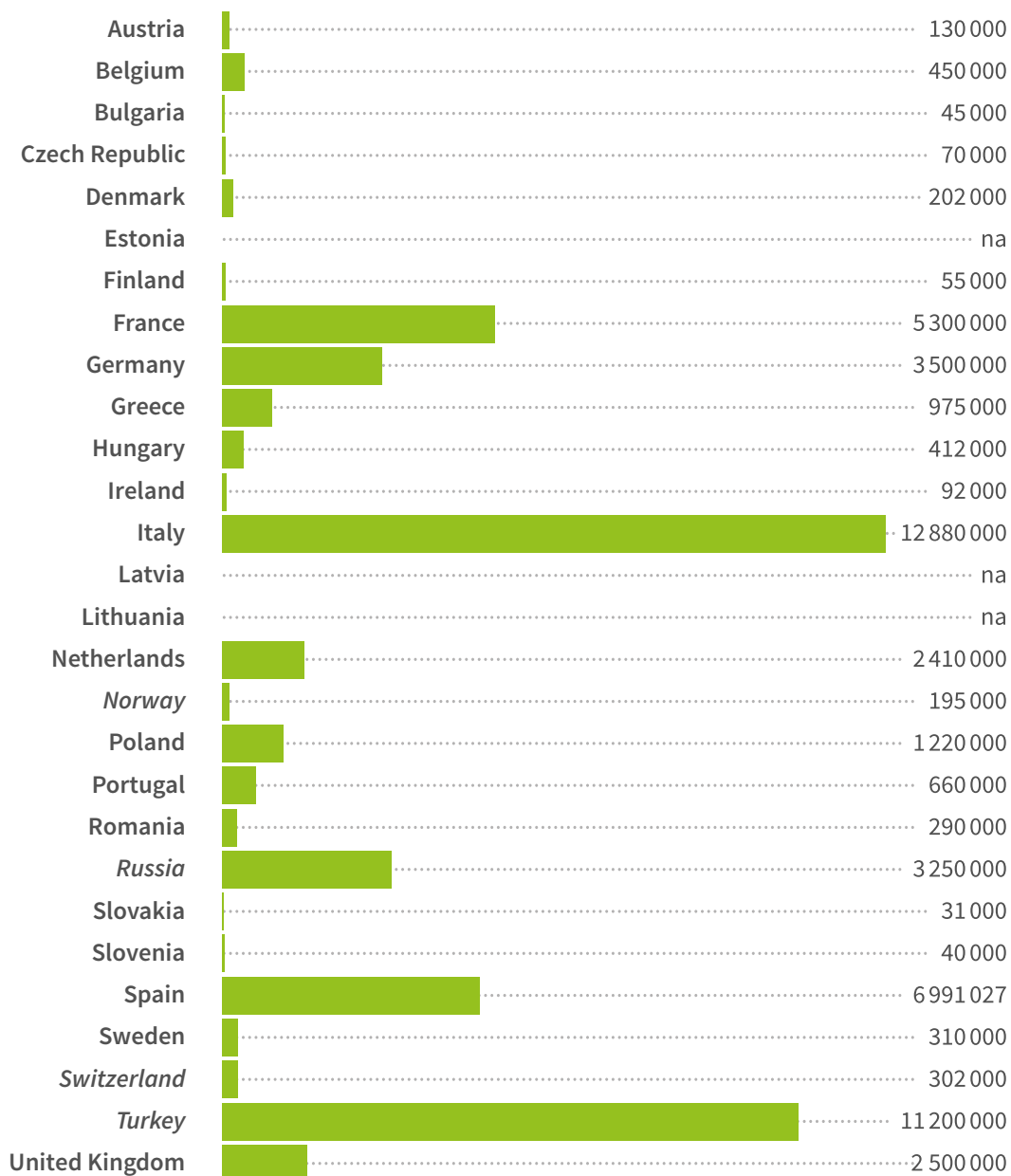
Total EU : 83 622 248

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 2021

European ornamental bird population



Total Europe : 48 719 769



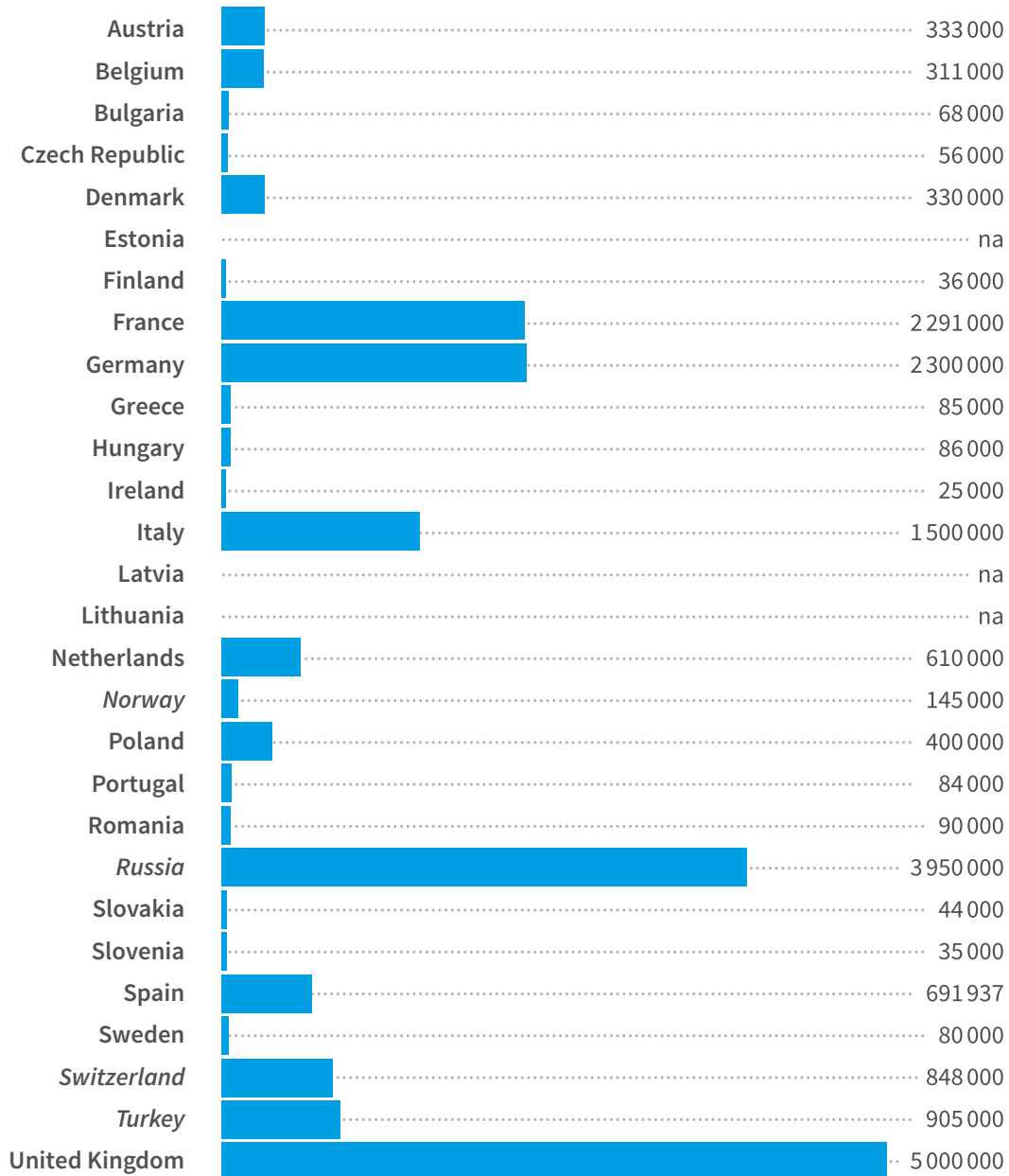
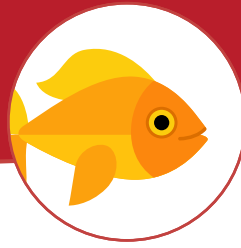
Total EU : 33 949 769

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 2021

Estimated number of European aquaria



Total Europe : 16 403 937



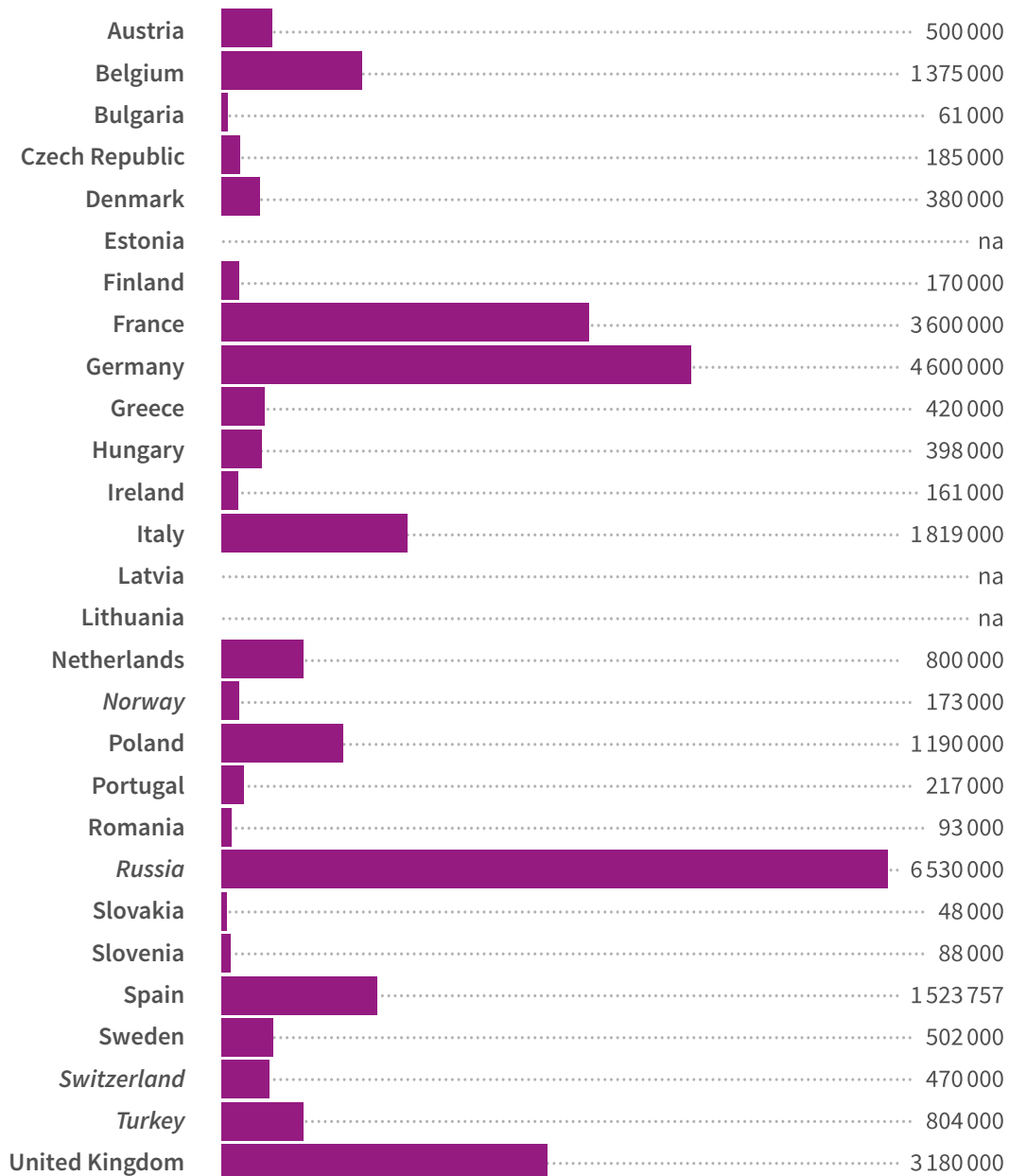
Total EU : 10 700 937

Non EU Member States indicated with italics

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FACTS & FIGURES 2021

European small mamal population



 **Total Europe : 29 347 757**

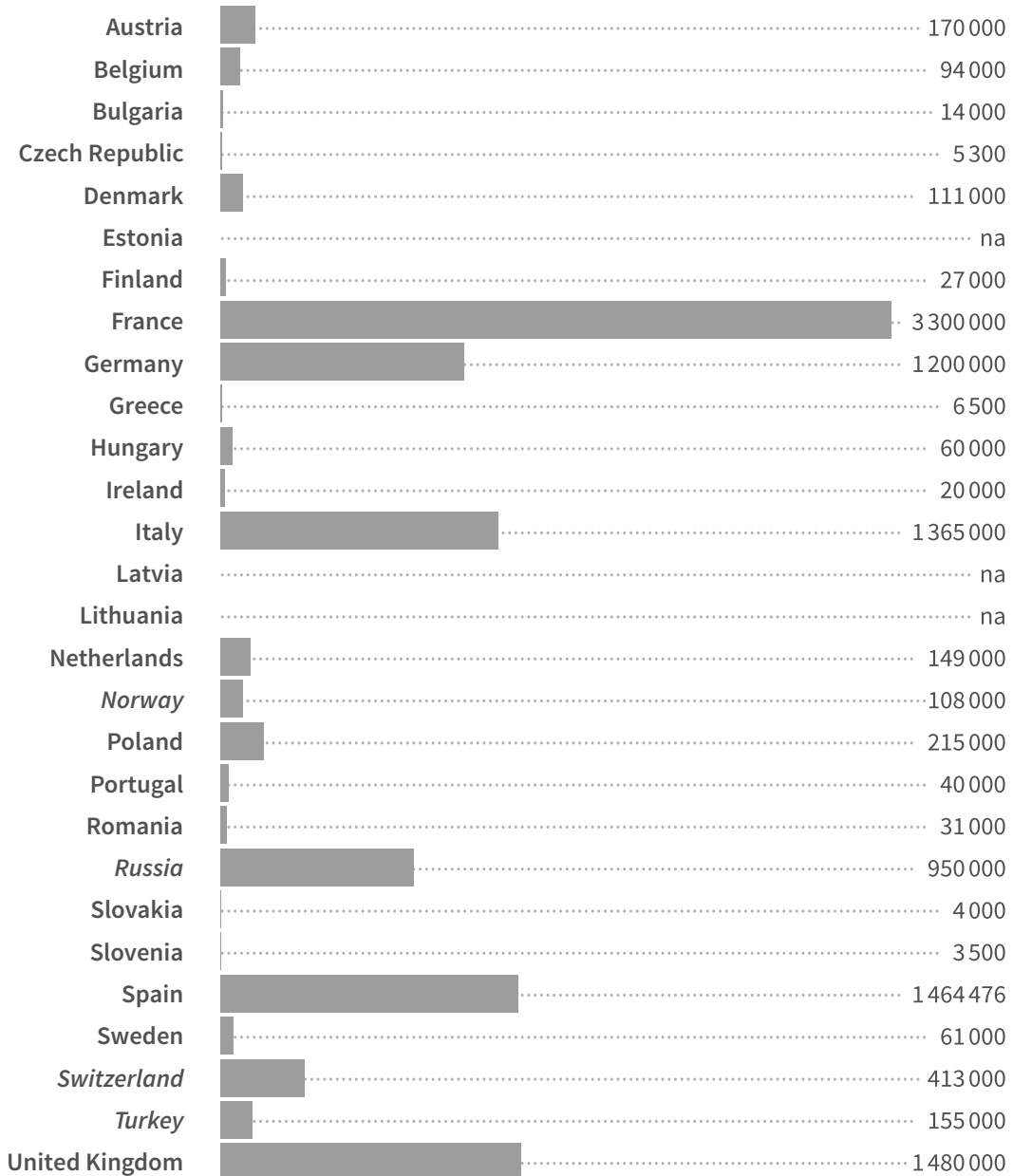
 **Total EU : 21 543 757**

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 2021

European terraria



 **Total Europe : 11 436 776**

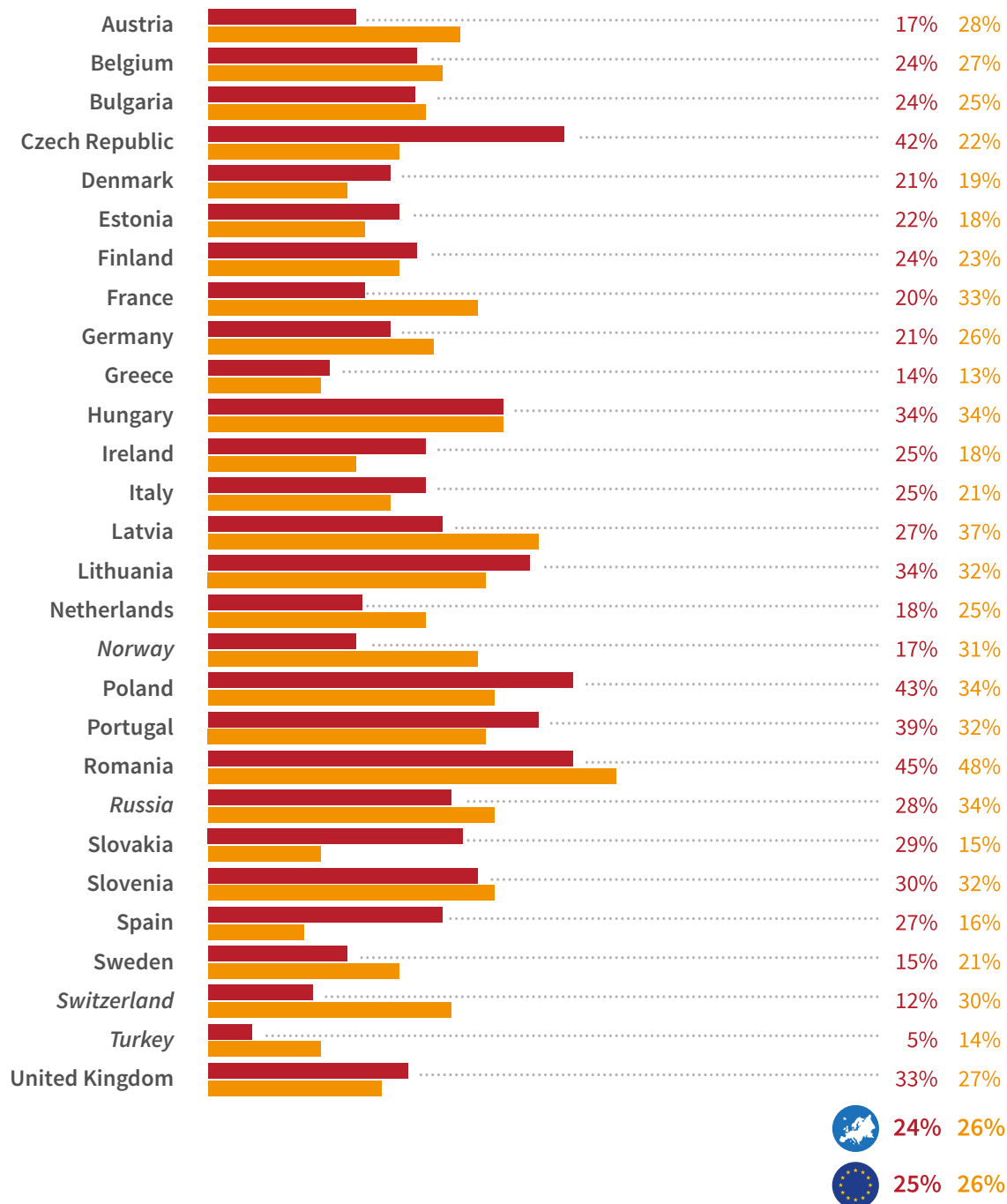
 **Total EU : 9 810 776**

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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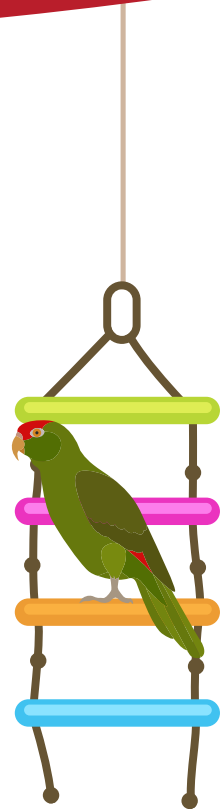
FACTS & FIGURES 2021

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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Overview of the Pet Food Industry in 2021/2022 Key milestones

18 Feed Materials and Trade

Navigating the Brexit challenge; establishing the UK as a ‘third country’; monitoring developments for improving cross border trade and ensuring a proportionate regulatory environment, looking at future market opportunities - Australia.

20 Environmental Sustainability

Publication of two position papers on flexible packaging and the Renewable Energy Directive; signed the EU Code of Conduct, participation in consultations on Sustainable Food Systems and the EU renewable energy rules, interaction with the Commission on topics related to packaging and circular economy.

22 Nutrition and Analytical Science

Publication of a reserve statement on the safety of phosphorus in cats’ diets, decision to develop an internal proposal for voluntary carbohydrate labelling, promotion of FEDIAF resources at external events - European College of Veterinary and Comparative Nutrition.

24 Product Communication

Engagement with experts from the Commission and Member States representatives concerning the Organic Regulation as well as rabbit & koi carp food.

26 Feed Hygiene and Safety

Decision to modernise existing training modules of FEDIAF's guide to Good Practice for the Manufacture of Safe Pet Foods and develop an e-learning package on good manufacturing practices.

29 Additives and Undesirable Substances

FEDIAF successfully compiled and submitted a dossier to EFSA to support the continued use of BHA in Cats and continues to defend a significant number of additives from withdrawal. A dossier for Propyl gallate is ready to submit after a tolerance study was conducted.

30 Small Pets

Establishment of a Small Pets Working Group to tackle the interests of all companion animals apart from cats and dogs.

34 Communications

Refinement of FEDIAF's mission statement and its three pillars message framework, revamping of FEDIAF's public website and development of a video explainer, increased voice at the EU level on the topic of animal welfare, increased social media presence and strengthening of existing collaboration with external stakeholders - The Pet Alliance Europe.

Highlights from FEDIAF Groups

A. Feed Materials and Trade

Introduction

The Feed Material and Trade Working Group comprises industry experts with a specific focus on plant and animal derived raw materials plus a knowledge of trade and its potential restrictions.

The rules for animal derivatives are covered by the Animal By-Products Regulations. There are over 350 pages of stringent rules and provisions safeguarding human and animal health, in addition to establishing the legal framework for sourcing safe raw materials for our industry, which requires every proposed amendment to be scrutinised very carefully to ensure that it is acceptable for the pet food industry. Since 1 January 2021, the remit of the working group also includes checking the parallel regulatory developments in the UK. As the closest 3rd country without an SPS agreement any differences could create non-tariff barriers.

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

Maximise 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 – Brexit- the practical implications

On 1 February 2020, the UK became a third country in trade terms for the EU. With the future trade relationship between the EU and the UK under discussion, everybody was looking to the UK to understand how the country would leave the EU at the end of the agreed transitional period.

The ominous announcement that the UK would leave with a “no deal” sounded benign until the practical difficulties of shipping products made from animal derived raw materials i.e., the majority of pet food, were fully understood.

The final agreement, signed just in time for Christmas 2020 was mainly covering the basics, leaving out any SPS considerations. Therefore, the focus of the working group moved to sharing any available information to provide members in the EU and in the UK with key information essential for continuing trade between the UK and the EU.

As a working group, the focus was on maintaining free trade and to ensure the UK was on the correct EU lists of third countries and third country establishments authorised to import pet food and raw materials to the EU from the UK and vice versa. In addition, together with the experts from the UK PFMA, the practical details moved centre stage, such as “how to fill in an export health certificate for entry into the EU”. Teaming up with PFMA a number of seminars supported members before and after the various compliance deadline.

The working group became a platform for sharing technical insights between members and UK PFMA to ensure that key details such as how to number the pages of the health certificate did not become a stumbling block for members wishing to trade with the UK (or more precisely Great Britain).

As a working group, we will continue to closely monitor any developments, but the focus has moved to potential regulatory divergence going forward.

Achievements – Co-operating with legislators

The group has worked on amendments to the:

- **Key EU export markets:** Monitoring developments and highlighting opportunities for improving cross border trade. Explaining to the EU commissions' stakeholders that their continuous support matters a lot to the industry.
- **EU Animal By-Products Regulation & TSE Regulation:** Monitoring developments and ensuring a proportionate regulatory environment.

Opportunities further afield: the group has also been looking at opportunities on the other side of the globe now that the EU has launched negotiations for a free trade agreement with Australia. This will be one of the key focal points for the years to come.



Highlights from FEDIAF Groups

B. Environmental Sustainability

Introduction

FEDIAF's Environmental Sustainability Working Group (ESWG) primary goal is to position the pet food industry as a responsible stakeholder in the EU Green Deal political debate, with a view to adopting a favourable framework for more sustainable pet food production. To embrace the challenges ahead and contribute efficiently to the forthcoming policy shaping, the ESWG has established its vision and mission:

- Vision: The Petfood Industry is a trusted contributor to the European circular economy and sustainability agenda, playing a key role in promoting the health and well-being of pets and by association their owners.
- Mission: Be a respected collaborator with authorities, regulators, academics, and other related stakeholders. From farm to bowl, FEDIAF is committed to the responsible use of resources, and minimising our environmental impact whenever possible.

Achievements

- Contributed to consultations on the future legislative framework on Sustainable Food Systems
- Published a cross-industry position paper on flexible packaging
- Sent a letter to DG GROW and DG ENVI to call on the European Commission to intervene against any national provisions on packaging that fail to comply with Single Market's principles.
- Signed the EU Code of Conduct on Responsible Food Business and Marketing Practices
- Published a position paper on the revision of the Renewable Energy Directive
- Participated in the consultation on the revision of the EU renewable energy rules

Sustainable food systems

The proposal for a legislative framework for sustainable food systems (FSFS) is one of the flagship initiatives of the Farm to Fork Strategy, alongside non legislative proposals such as the Code of Conduct on Responsible Food Business and Marketing Practices.

The new FSFS legislative framework will create an enabling environment to ensure that all foods placed on the EU market increasingly become sustainable through a 'socially responsible value chain'.

The FSFS will be adopted by the Commission by the end of 2023. The sustainability labelling framework will be part of the FSFS.

The Inception Impact Assessment (IIA) related to the Sustainable food system framework initiative was published for public feedback from **28 September 2021 until 26 October 2021**. This feedback period aimed at offering all interested parties, including citizens, the possibility to contribute to the policy-making cycle. **230** contributions were received. FEDIAF responded to this consultation and will continue to contribute whenever possible to ensure that policy options proposed by the European Commission are workable to members.

The Code of Conduct

The EU Code of Conduct on Responsible Food Business and Marketing Practices is one of the first deliverables of the Farm to Fork Strategy and the European Green Deal, as well as global sustainability targets, such as the UN sustainable development goals. It sets out the actions that the actors 'between the farm and the fork', such as food processors, food service operators and retailers, can voluntarily commit to tangibly improve and communicate their sustainability performance. The Code entered into force on 5 July 2021.

In January 2022, FEDIAF signed the Code of Conduct following the example of many other organisations. The decision to sign this document was firstly conceived by the members of FEDIAF ESWG. By signing the Code, FEDIAF will seek to support and contribute to the aspirational objectives that it sets out, where applicable to the pet food sector. Moreover, it subscribes to the Code's obligations, such as disseminating and promoting it amongst its members to encourage more sustainable practices and explore the possibility of developing sector-specific tools and resources. Finally, FEDIAF will also provide an annual report of its activities as well as pursue dialogue with stakeholders and policy-makers.

Renewable Energy Directive

The EU renewable energy directive (RED) was originally adopted in 2009 to deliver the EU goal of a minimum 20% share of renewable energy sources (RES) in final energy consumption by 2020. The RED was substantially revised (recast) in 2018 to deliver the EU objective of a minimum 32% share of RES in final energy consumption by 2030. As part of the European Green Deal, the EU has adopted even more ambitious climate goals, setting a target of -55% greenhouse (GHG) emissions by 2030 and a long term goal of net zero GHG emissions by 2050.

FEDIAF welcomes the ambitious climate package and supports mainstreaming of renewable energy across all economic sectors. Our members have made several commitments in this area already. As the EU takes bold steps towards decarbonizing transport, it is important to ensure coherence with established policies such as circular economy and food and feed security. This is particularly relevant when valuable by-products are used for biofuels, diverting raw materials from sectors which have for decades used them in line with the waste hierarchy.

Essential pet food materials, such as Category 3 animal by-products, should not be diverted toward biofuels.

They are key ingredients in pet food (source of energy and for palatability but above all else, a source of essential fatty acids).

Our industry has experienced well-documented and unprecedented pressure on raw material availability and one of the often-raised aspects is the demand of raw materials in fuels. Even though category 3 animal fats are not mentioned in the Renewable Energy Directive, they are increasingly being used and marketed as sustainable biofuels.

For our industry category 3 animal fats are critical. For biofuels, it is a choice. Not only that, respected expert from NGOs, have shown that there are many, more credible pathways to enable transport to become more sustainable. FEDIAF will continue to advocate for Category 3 by-products to be used according to the material waste hierarchy criteria which are in line with the Circular Economy ambitions of the EU.



Highlights from FEDIAF Groups

C. Nutrition and Analytical Science

Introduction

One of FEDIAF's main objectives is to safeguard the wellbeing of pets by ensuring its member companies provide well-balanced and nutritionally sound pet food. To achieve this goal, FEDIAF's experts work together with a Scientific Advisory Board that includes independent and renowned scientists from across Europe. The Scientific Advisory Board advises on the scientific standards of the recommended nutrient levels, which are incorporated in FEDIAF's Nutritional Guidelines.

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

Objectives

- Contribute to the wellbeing of pets by ensuring the manufacture of nutritious and palatable food reflecting the most recent developments in scientific knowledge
- Ensure FEDIAF Guidelines are the "go to" document on pet nutrition in Europe – and beyond
- Ensure a level playing field and enhance scientific cooperation between pet food manufacturers, petcare professionals and competent authorities

Achievements

Safety of Phosphorus in cats - Reserve Statements

In order to reflect the latest state of knowledge the reserve statement on phosphorus in cat diets has been updated and a reserve statement for phosphorus in dog diets has been developed.

Carbohydrate Labelling

In Q4 2021, FEDIAF agreed to work on an internal proposal for voluntary carbohydrate labelling.

This work involves the Nutrition, Prod Comms and Analytical workstreams.

In general, the issue is complex due to the complexity of the carbonyl (CHO) group, the uncertainty of standardized analytical methods and low consumer understanding. Further consultation of the SAB on carbohydrates breakdown and the role of fibre in carbohydrate calculation is ongoing.

Available FEDIAF resources promoted at online veterinary congress.

The 25th Congress of the European Society of Veterinary and Comparative Nutrition (ESVCN) Congress was held online in 2021. The digital format of the annual congress provided a great opportunity to connect nutrition scientists and experts, and through live Q&A's discuss the latest research findings.

FEDIAF has adapted to this new format and secured its presence at this important event through a logo display on the main conference website and a link to the FEDIAF website.



Highlights from FEDIAF Groups

D. Product Communication Working Group

Introduction

The Product Communication Working Group comprises experts in the field of labelling and product communication. The team has excellent technical and legal expertise.

Pet Food Product Communication has been evolving over recent years. From a very simple pack with minimal information (mainly limited to compulsory declarations) to current product communication, which involves, not only more content-rich packs, but also TV-advertisements, complementary on-line information, colourful leaflets, etc.

In the last year, this WG acted to ensure that the key priorities were tackled and well-represented to policymakers. Pet food, although under feed regulation, has its own specificities, which FEDIAF has to ensure are taken into account by the EU authorities.

Achievements

Organic Regulation

- FEDIAF had several meetings with DG AGRI to discuss the Organic Regulation and its challenges for the pet food industries.
- Letter sent to the DG AGRI Commissioner calling the European Commission to solve the current labelling rules in the EU Regulation (EU) 2018/848 that will put the future existence of organic pet food at critical risk.
- Response from the Commissioner stating that “our final goal is to avoid the disruption of the organic pet food market and to make sure that it will continue to develop”.

Rabbit & koi carp food

- FEDIAF’s position was shared with the European Commission and Member States representatives. This is a long-standing industry topic that was again addressed in the SCOPAFF meetings in 2021. FEDIAF is hopeful that a satisfactory solution may be found via an amendment to an Annex of Regulation 767/2009. FEDIAF will continue to follow the discussions and engage with experts and the EC in 2022.



Organic Production

The new Regulation on **Organic Production** (Regulation (EU) 2018/848 on organic production and labelling of organic products) which came into force on 1 January 2022, unlike the previous Regulation, fully includes pet food (as feed) within its scope.

- Previously, organic pet food has been based on national rules or private standards accepted or recognized by member states. This new regulatory environment means that organic pet food needs to fulfil all the requirements as per organic feed.
- The working group identified two main issues: labelling rules and secure authorization for the use of essential additives, which will allow the industry to continue producing complete organic pet food (dog/cat; dry/wet).

Rabbit & koi carp food

Pet animals are defined as any non-food producing animal belonging to species fed, bred, or kept, but not normally used for human consumption in the Community (Article 3.2 (d)).

The key point of overlap is the focus on “species”. As some pets are from species that are falling under two categories: food producing animals and non-food producing animals. With regards to rabbits and koi carps, this overlap is particularly challenging for our members.

Keeping pet rabbits or koi carps is significantly different from keeping rabbits and carps for human consumption. Providing a balanced diet for pets’ vs farm animals can be very different regarding the purpose and the level of information required by their keepers.

FEDIAF’s position is that these products may be labelled according to the rules on the labelling of feed for non-food producing animals provided that:

- Products placed on the markets are in shelf ready packaging;
- This is limited to pet rabbit and koi carp feed;
- The packaging size does not exceed 10 kg;
- The product is clearly labelled as destined for non-food-producing animals (by pictures, other visuals and/or words);
- Commitment from members that these products do not contain additives which have only been authorised for farm animals;
- The detailed composition as required for farm feed is published on a website and on the label of the product an appropriate means of accessing the website is indicated, similar to Art 19 of Regulation 767/2009;
- The FEDIAF Code of Good Labelling Practice is supplemented with a separate chapter on pet rabbit and koi carp food labelling in line with the above.

Code of Good Labelling Practice

The WG also started updating the Code of Good Labelling Practice for Pet Food, which is the main tool for the pet food industry to support the creation of a “level playing field” in terms of product communication.

Highlights from FEDIAF Groups

E. Feed Safety & Hygiene Working Group

Introduction

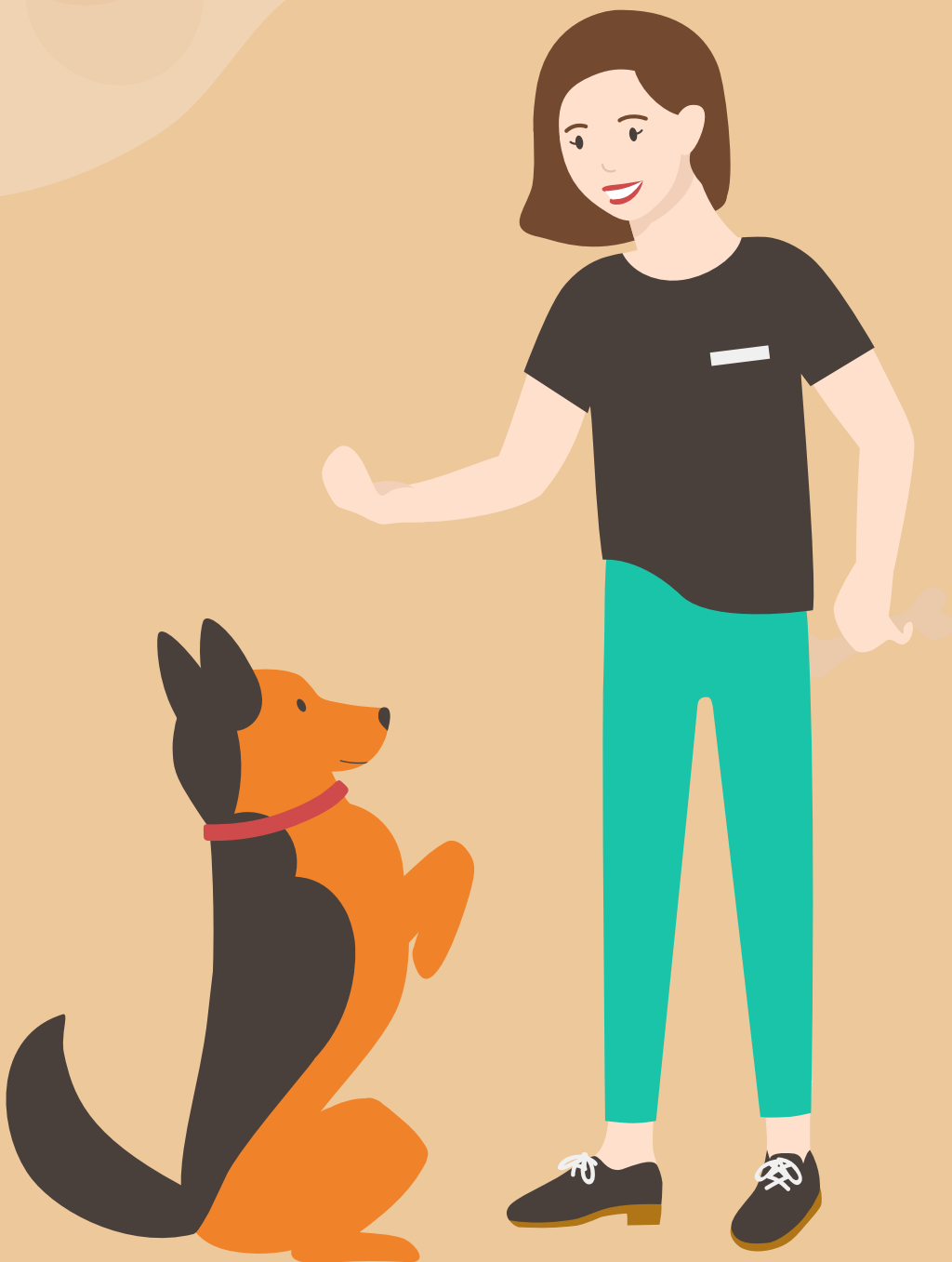
The implementation of tailor-made pet food management systems in every pet food plant is crucial to ensuring the safety and hygiene of processes and finished pet food products. FEDIAF's Guide to Good Practice for the Manufacture of Safe Pet Foods, endorsed by the EU authorities in 2018, is now well-known and established within the sector. However, its enforcement by national control authorities varies significantly across the Member States.

As a result, FEDIAF decided to modernise existing training modules, which can be used by companies and also by National Associations. These training sessions can be jointly organised with national authorities. In addition, to reach out to a large number of stakeholders and readers, an e-learning package was developed in the course of 2020 and made available on the FEDIAF website.

Objectives

- Finalise the revised training modules to support the implementation of the guide.
- Develop an e-learning package on good manufacturing practices.





Highlights from FEDIAF Groups

F. Additives and Undesirable Substances

Introduction

FEDIAF's Additives and Undesirable Substances Working Group includes European industry experts on the 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 products achieve the high levels of pet and owner acceptance in terms of flavour, texture and appearance that enables the European pet food business to thrive.

Only additives that have adhered to the strict authorisation / reauthorisation 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 defended and thoroughly assessed with the best possible body of evidence. 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 increasingly sourced globally. FEDIAF, in association with the EU 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, and respond on behalf of the EU pet food industry. We also work with key authority contacts 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 2021

- A dossier to support the continued use of BHA in cats gained a positive EFSA opinion and reauthorisation thanks to a project funded by FEDIAF.
- A tolerance study for propyl gallate in cats has been completed with excellent results and we await a positive outcome of the EFSA assessment.
- Gelling Agents: Due to an ongoing threat to continuity of authorisation, FEDIAF is exploring the options of conducting a number of tolerance studies and literature work to create more robust datasets for key materials such as Xanthan, Carrageenan, Guar and others.
- 1831 Restage: After a year of positive engagement, we look forward to a more flexible and fit for purpose additives regulation in the future.
- Undesirable Substances: We continue to engage on key issues such as mycotoxins and nanoparticles to anticipate future issues in pet care.

Highlights from FEDIAF Groups

G. Analytical Science

Introduction

FEDIAF's mission is to facilitate the supply of safe and nutritious products. Since the creation of the Analytical Science working group last year, the importance of analytical methods continued to evolve through challenges prompted by external reports on contaminants or nutritional parameters, and the need for a clear view of method robustness or level of applicability to additives re-authorisation process remains present.

The Working group on Analytical science developed to be a reference point for all topics and questions related to analytical methods.

One of the Groups' missions is to provide internal advice to other Working Groups. From the Nutritional working group, the group received the request to provide expertise, views, and opinions on an analytical method to measure inorganic Phosphorus developed by the University of Munich. Furthermore, the members provided an overview of available analytical methods for the different carbohydrates as part of the carbohydrate labelling workstream in the Nutritional working group.

Another mission is to provide advice externally to other trade associations. The group participated in an inter-association meeting with leading associations FEFANA/AMFEP/EuropaBio on the proposed next steps for authorised rDNA in additives by fermentation. The Analytical Science Working Group will actively drive industry recommendations on the development and usage of analytical methods, and in this area the group is working on a roadmap for developing a gold standard method to measure acrylamide in pet food.

The limited resources available in the Analytical working group obliged all to balance the workload by operating in priority mode. Since the creation of the Analytical science working group, significant output relevant to the industry has been delivered. And by increasing the engagement and participation in this workgroup, the aim is to continue building the stance and output of the Analytical science working group.



Highlights from FEDIAF Groups

H. Small Pets

Introduction

FEDIAF members manufacture food for all pets, including small pets. For these, specific topics or discussions can arise that are not covered in detail by other existing Working Groups.

In order to cover these topics, FEDIAF has established a Small Pets Working Group. This Working Group will look after the interests of all companion animals apart from cats and dogs. It will represent a wide range of manufacturers across the membership who cater for a large number of different species.

Objectives

The objectives of the Small Pets Working Group are:

- Represent interests of pet food for other pets than cats and dogs with respect to legislative issues
- Develop nutritional guidelines for a wide range of new species including goldfish, pet birds, guinea pigs, etc.
- Produce educational resources for pet care professionals and pet owners
- Provide expertise on nutrition for small pets, including exotics



Highlights from FEDIAF Groups

I. Communication

Introduction

The Communications Working Group continues to work hard to increase the visibility of FEDIAF as the credible and responsible voice of the European pet food industry. To increase the organisation's profile, it has been crucial to engage with our internal and external audiences, especially with political stakeholders at the EU and national levels. One of our aims is to promote the positive impact pets play in European society. We also work to build trust and transparency in the industry. We achieve this through our regular communications across a wide range of platforms and formats: website, events, newsletters, press releases, factsheets, and presence on social media platforms like LinkedIn and Twitter.

The work of the group has become increasingly strategic, and it is yearly shaped around FEDIAF's overall strategy and key priorities. Furthermore, we have refined the organisation's mission as well as its three pillars message framework, which are now focused on the science behind the industry, the role of pets in society, and the industry's commitment to environmental sustainability. We have also strengthened our existing collaborations with stakeholders from other industries, through the Pet Alliance Europe, where FEDIAF works alongside Animal Health Europe to promote the role of pets in society and advocates for responsible pet ownership. Finally, we have increased our voice at the EU level on the topic of animal welfare by participating in the EU Platform on Animal Welfare, commenting on the European Commission public consultation, and committing to develop two position papers on pet welfare and farm animal welfare.

Achievements

Revamp of FEDIAF website

After revamping FEDIAF's online member area, the Secretariat and the Communication Working Group decided to update its public website. While it contains many useful resources, such as the nutritional guidelines, the look and feel of this section needed modernisation. Furthermore, the current website Content Management System is outdated and thus will be replaced with WordPress to allow the Secretariat uploading new content faster and more frequently.

Development of a video explainer

In the last quarter of 2021, the Communication Working Group agreed that the development of a FEDIAF video explainer was a valuable project for the association. This video explainer will target policy-makers, legislators, politicians, NGOs, and other stakeholders in Brussels. The content of this animation will be based on FEDIAF's mission, the three pillars of its message house (i.e., technical expertise, pets in society and sustainability) and data drawn from FEDIAF Facts & Figures. Once completed, the video will be displayed on the FEDIAF website as well as during other FEDIAF events, like the FEDIAF Congress & AGM 2022.



Increased Social Media presence

A FEDIAF Twitter account was opened to increase the organisation's online presence. Furthermore, posting on both FEDIAF LinkedIn and Twitter accounts increased from 2/3 to 4/5 posts a week. Content shared in social media includes FEDIAF's technical expertise as well as the promotion of the beneficial role of pets in society.

Refinement of FEDIAF's message house

To increase the visibility of FEDIAF's profile, the organisation's message house was refined. Thus, a written explainer was created highlighting the FEDIAF mission and its three pillars message framework. These pillars include:

1. The science and technical expertise enable the pet food industry to produce its products.
2. The beneficial role of pets in society.
3. The commitment that the industry has towards environmental sustainability.

Strengthening of the Pet Alliance

In the past year, the co-operation with AnimalHealthEurope in the form of the Pet Alliance was increased to promote the beneficial role of pets in society and advocate for responsible pet ownership. In September, the Alliance successfully organised a virtual event to examine the role of #PetPower in Europe. Speakers included the Alliance team as well as a panel of experts from the European institutions and the Maisons-Alfort National Veterinary School.

The Pet Alliance was further strengthened in 2022 since several meetings were held to discuss potential research opportunities in the framework of Horizon Europe, the potential expansion to new members and/or partners, and the planning of the activities for 2022.

Press articles and Press Releases

As in previous years, FEDIAF continued its media partnership with Pets International and published two articles written by FEDIAF on environmental sustainability and the healthy weight management of pets. Furthermore, FEDIAF was also featured in other publications, such as Animal Health, Pet Food Processing, Espèces Pro, and the European Supermarket Magazine. The association also circulated press releases on several topics, such as the release of the new Nutritional Guidelines.

FEDIAF Congress & AGM 2021

On 17 June 2021, FEDIAF Congress & AGM was held online. Apart from the Secretariat, the event included several guest speakers from the European Commission, such as Mr Sadauskas from DG Environment and Dr Trunk from DG Sante. A round table discussion on Brexit was also organised with speakers from FEDIAF, PFMA, the French Embassy in the UK, and DG Trade of the European Commission.

Furthermore, a group comprised of the Secretariat and the Chair of the Communication WG met regularly throughout the past year to organise FEDIAF Congress & AGM 2022. After two years of virtual events, this year the Congress will take place in-person in Brussels on 22 and 23 June 2022.

An increased voice on animal welfare at the EU level

In 2021, FEDIAF has increased its actions at the EU level on the topic of animal welfare. Firstly, the organisation has contributed to two European Commission's online public consultations, concerning the Inception Impact Assessment for the revision of the animal welfare legislation. FEDIAF's feedback to these consultations was limited to the reference on including cats' and dogs' welfare regarding transport for commercial purposes.

Secondly, FEDIAF became a full member of the EU Platform on Animal Welfare. This platform was established by the European Commission in 2017 to co-ordinate actions on animal welfare with a particular focus on key related themes and regulations. Members of this platform include the EU Member States, EU institutions international organisations, independent experts, business or professional organisations, and civil society. Finally, the Communication Working Group agreed upon developing two FEDIAF position papers on pet welfare and farm animal welfare.

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.

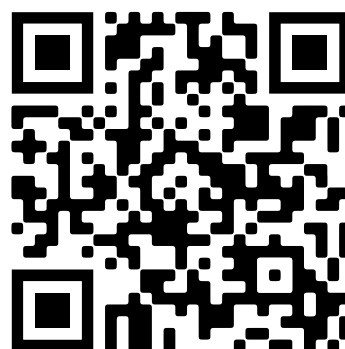
We work through a committee structure and the Secretariat works closely with the Communications Working Group and Executive Committee – reporting to the General Assembly.

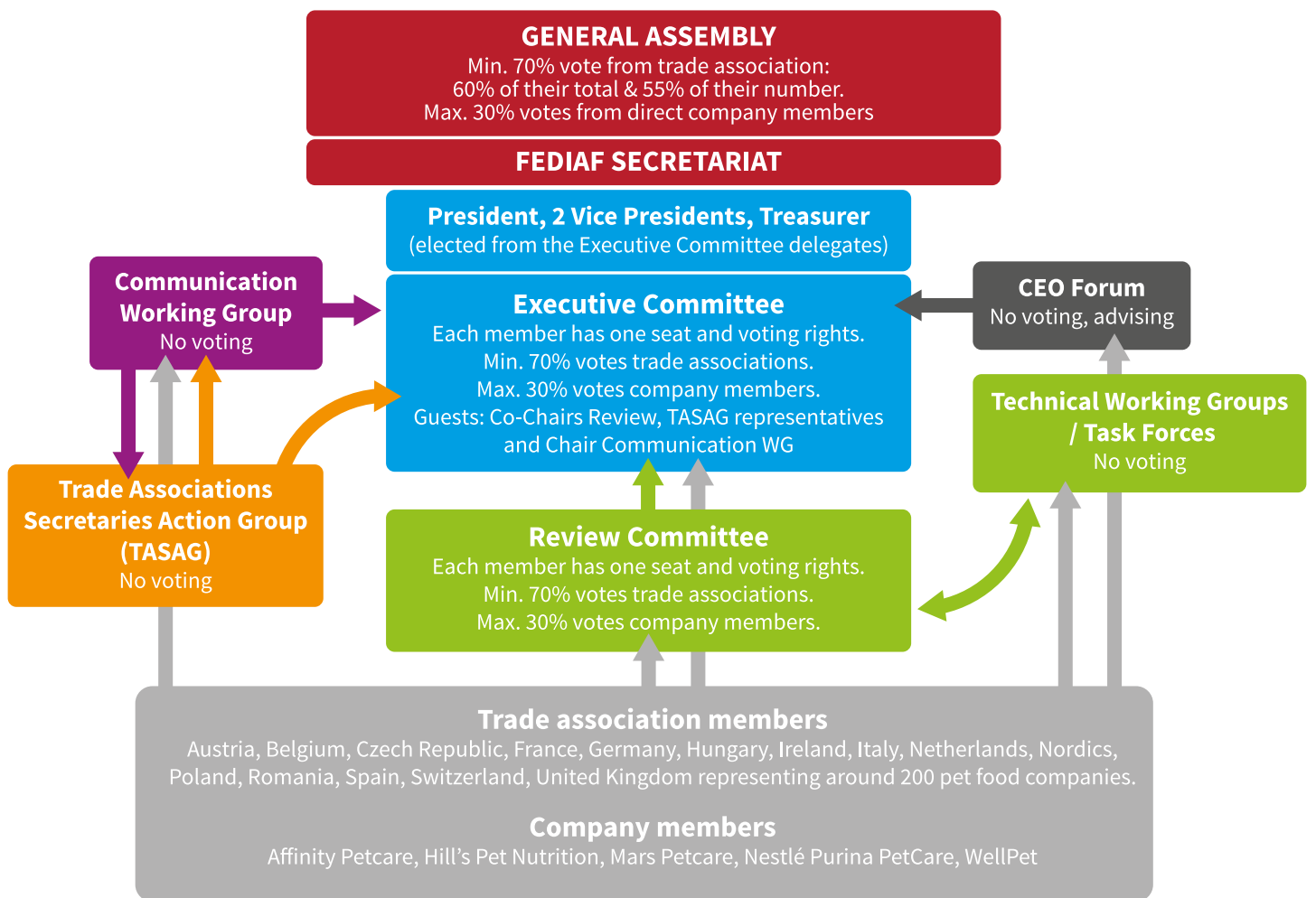
The Executive Committee and the General Assembly are chaired by the FEDIAF President, elected every two years. FEDIAF President June 2020- June 2022 is Annet Palamba. Our Review Committee – led by two co-chairpersons to co-ordinate the working groups and to give political leadership and guidance - looks at

- Additives and Undesirable Substances
- Feed Safety and Hygiene
- Product Communication
- Nutrition
- Analytical Science
- Feed Materials and Trade
- Environment and Sustainability
- Small Pets

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

**To know more
about FEDIAF structure:**





Committees and WG's members

Executive Committee

Executive Committee Chair: Annet Palamba – NVG

Vice-chair: Christophe Carlier – FACCO

Vice-chair: Kerstin Schmeiduch – Nestlé-Purina PetCare

Gratziela Bahaciu – ARPAC

Robin Balas – Co-Chair Review Committee

Jana Burajová – SVPDZ

Rosa Carbonell – Co-Chair Review Committee

Josep Crusafont – Affinity Petcare

Irina Derksen – Hill's Pet Nutrition

Terkel Due – Nordics

Urs Eberhard – VHN

Hermann Habe – ÖHTV

Lajos Hanzel – HPFA

Robert Kaczmarek – POLKARMA

Katrin Langner – TASAG representative

Lina Lopez – WellPet

Pietro Molteni – ASSALCO

Balázs Pályi – Mars Petcare

Victor Romano – ANFAAC

Sharon Schroevers – BEPEFA

Greg Van Praagh – PFMA

Jürgen Wigger – IVH

Review Committee

Co-Chair: Robin Balas – Royal Canin

Co-Chair: Rosa Carbonell – Nestlé Purina PetCare

Izabella Balanyiné – HPFA

Josep Crusafont – Affinity Petcare

Åsa Dufva – Nordics

Irina Derksen – VHN

Pierre Jaouen - FACCO

Robert Kaczmarek – POLKARMA

Karen Elizabeth Linley – Mars Petcare

Lina Lopez – WellPet

Melinda Magdus – HPFA

Mariska Niesten - NVG

Anita Pachatz – ÖHTV

Monika Prenner – PFMA

Nicole Rabehl - IVH

Victor Romano – ANFAAC

Willeke Stroucken – NVH

Yvan Tomaselli – Nestlé Purina PetCare

Stefano Zigiotta – ASSALCO

Astrid Schuijlenburch – Royal Canin

Celina Torre – Affinity Petcare

Donna Snellgrove – Mars Petcare

Fabrice Mathieu – Royal Canin

Ingrid Van Hoek – Royal Canin

Isabelle Kalmar – Versele-Lega

Jean-Louis Paillot – Nestlé Purina PetCare

Matthew Elliot – Mars Petcare

Thomas Brenten – Saturn Petcare



Trade Associations Secretaries Action Group (TASAG)

Chair: Raquel Izquierdo de Santiago – FEDIAF

Antonella Baggini – ASSALCO

Alexandra Manasia – ARPAC

Benita Beekhof – NVG

Michael Bellingham – PFMA

Aurélie Bynens – FACCO

Santiago de Andres - ANFAAC

Markus Eigner – ÖHTV

Stefan Emmenegger – VHN

Magda Hrabcova– SVPDZ

Katrin Langner – IVH

Shane Lyster – PFAI

Ewa Lucyk – BEPEFA

Maciej Przewdziaak – POLKARMA

Tamás Racskó – FHF1

Elien Van Stichel – BEPEFA

Åsa Dufva – Nordics

Benjamin Petiteau – FACCO

Hege Rosenhaug – Nordics

Lana Morgan – PFMA

Pablo Hervas – ANFAAC

Soren Hempel Thomassen – Nordics

Stephanie Gabel – Nordics

Stéphanie Roux – FACCO

Terkel Due – Nordics

Laura Gil Martens – Nordics

Communication Working Group

Chair: Dieter Meyer – Vitakraft

Antonella Baggini – ASSALCO

Nicole Paley – PFMA

Balázs Pályi – Mars Petcare

Sharon Schroevers – Hill’s Pet Nutrition

Eva Ruiz – Royal Canin

Isabel Buil – Affinity Petcare

Laureline Malineau – Royal Canin

Margarita Llobet – Nestlé Purina PetCare

Mindaugas Rupsys – Mars Petcare

Monika Vavrova – Hill’s Pet Nutrition



Additive and Undesirable Substances Working Group

Chair: Matthew Elliott – Mars Petcare

Vice-chair: Paula Wartelski – Nestlé Purina PetCare

Irina Derksen – Hill's Pet Nutrition

Emanuel Fischbacher – Bosch Tiernahrung

Gert Grossheider – Gimborn

Kounawit Heng – Nestlé Purina PetCare

Pierre Jaouen - Sopral

Jerome Naar – Royal Canin

Adriana Oraczewska-Podolska – Royal Canin

Victor Romano – Affinity Petcare

Amélie Serment - Nestlé Purina PetCare

Boris Terlinden – Rondo Food

Martin van Bohemen – Hill's Pet Nutrition

Aline Hartman – Nestlé Purina PetCare

Marina Stoeckel – Saturn Petcare

Hilke Seyffarth – Nestlé Purina PetCare

Ursula Huber – Mars Petcare

Nutrition Working Group

Chair: Thomas Brenten – Saturn Petcare

Vice-chair: Lisa Conboy – Nestlé Purina PetCare

Ariane Wehrmaker – Saturn Petcare

Astrid Schuijlenburch – Royal Canin

Catherine Bogaert – NEODIS

Celina Torre – Affinity Petcare

Dennis Smith – United Petfood

Francis Pastoor – Dechra

Ingrid Van Hoek – Royal Canin

Isabelle Jeusette – Affinity Petcare

Iveta Becvarova – Hill's Pet Nutrition

Jean-Cristophe Bouthegourd – Nestlé Purina PetCare

Karin Kuhn – Bosch Tiernahrung

Libby Sheridan – Nestlé Purina PetCare

Mikki Koot – Edgard & Cooper

Petra Hellweg – Mars Petcare

Sanan Talibov – De Haan Petfood

Feed Materials and Trade Working Group

Chair: Monika Prenner – Nestlé Purina PetCare

Vice-chair: Ursula Huber – Royal Canin

Alfred Schlosser – Nestlé Purina PetCare

Andreas Thoben – Vitakraft

Aurélie Bynens – FACCO

Balázs Pályi – Mars Petcare

Barbara Rondo Brovetto – Nestlé Purina PetCare

Benjamin Petiteau – FACCO

David Van Belle – Wellpet

Ignacio Conde – Affinity Petcare

Irina Derksen – Hill's Pet Nutrition

Kounawit Heng – Nestlé Purina PetCare

Kristel Wolfs – Wellpet

Lynn Insall – PFMA

Martina Gerndt – Mars Petcare

Massimo Pagani – United Petfood

Mindaugas Rupsys – Mars Petcare

Sabine Mladenovic-Spiss – Ospelt

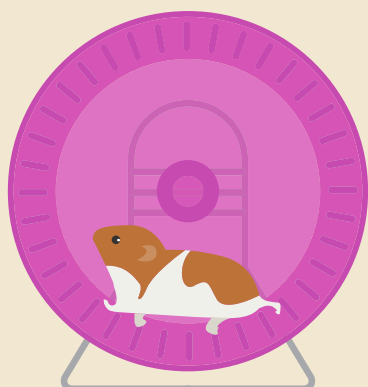
Sarka Hrubcova – Hill's Pet Nutrition

Shane Lyster – PFAI

Silke Santana – Nestlé Purina PetCare

Stéphanie Roux – FACCO

Teresa Fischerova – Hill's Pet Nutrition





Analytical Science Working Group

Co-Chair: Jean-Louis Paillot – Nestlé Purina PetCare

Co-Chair: Ingrid Van Hoek – Royal Canin

Elena Hijosa – Dibaq Petcare

Gian Andrea Guidetti – SANYpet SpA

Klaus Tesch – Saturn Petcare

Tobias Gorniak – Fihumin

Product Communication Working Group

Chair: Victor Romano – Affinity Petcare

Vice-Chair: Monika Prenner – Nestlé Purina PetCare

Andreas Thoben – Vitakraft

Aurélie Bynens – FACCO

Balázs Pályi – Mars Petcare

Frauke Schibilla – Vitakraft

Ilaria Pesci – Royal Canin

Ines Munzfeld – Mars Petcare

Irina Derksen – Hill's Pet Nutrition

Klaus Tesch – Saturn Petcare

Laetitia Rouillé – Nestlé Purina PetCare

Luisa Vierbaum – Rondo Food

Manou Goeminne – Versele-Lega

Marco Halff – Queens Products

Maria Luisa Valentini – Nestlé Purina PetCare

Marina Stoeckel – Saturn Petcare

Monika Vavrova – Hill's Pet Nutrition

Pierre Jaouen – Sopral

Shane Lyster – PFAI

Stéphane Peeters – Spectrum Brands

Willeke Stroucken – Ppf Europe

Tommaso Mechelli – Affinity Petcare

Environmental Sustainability Working Group

Chair: Fabrice Mathieu – Royal Canin

Vice-Chair: Cedric Moulin – Nestlé Purina PetCare

Aida Al Valverde – Affinity Petcare

Amaya Lopez Sastre – Petselect

Balázs Pályi – Mars Petcare

Benjamin Petiteau – FACCO

Caroline Ploux – Mars Petcare

Christian Schunemann – IVH

Pietro Bartocci – ASSALCO

Eva Ruiz – Royal Canin

Franz Kainz – Ospelt

Irina Derksen – Hill's Pet Nutrition

Jérôme Patte – Virbac

Karen Elizabeth Linley – Mars Petcare

Laetitia Rouillé – Nestlé Purina PetCare

Martin Kaczara – Hill's Pet Nutrition

Mireia Garcia – Affinity Petcare

Monika Vavrova – Hill's Pet Nutrition

Nicole Paley – PFMA

Omar Barcellona – Nestlé Purina PetCare

Paul van der Raad – Protix

Paula Wartelski – Nestlé Purina PetCare

Pierre Martinez – Virbac

Stéphanie Roux – FACCO

Small Pets Working Group

Co-Chair: Isabelle Kalmar – Versele-Lega

Co-Chair: Donna Snellgrove – Mars Petcare

Michael Bellingham – PFMA

Elena Fernandez Sanchez – Dibaq

Alan Gittins – Mr Johnson's

Andreas Thoben – Vitakraft

Angelique Bremer – Vitakraft

Barbara Venturelli – Gimborn

Claire Hamblion – Supreme Petfoods

Georgina Shrimpton – Beaphar

Guy Werquin – Versele-Lega

Jan-Cristoph Schwarze – Spectrum Brands

Juliette Marshall – Mazuri Zoo Foods

Marion Turnbull – Cargill

Patrick Ghysels – Versele-Lega

Sam Marriage – Marriage's Millers

Sarah Hormozi – PFMA

Wojciech Rosolowki – Tropica

The Secretariat's Team



Annet Palamba

President, FEDIAF (2020 - 2022)

Annet Palamba has been working at Hill's Pet Nutrition since 2013 and is Hill's General Manager for the Benelux business. Since she joined Hill's she has been active in the pet food trade associations for The Netherlands, Belgium and also at European level, where she most recently was co-chair of the Communications Working Group and member of the Executive Committee.



Raquel Izquierdo de Santiago

Secretary General, FEDIAF (2020 – present)

Raquel Izquierdo de Santiago studied law in Salamanca (Spain), where she is originally from, and has a master's degree in European Legal Studies from the University of Leeds (United Kingdom). Raquel has extensive working experience in Brussels, with a proven track record on European policy affairs, public relations, and association management. In recent years she also followed an Executive master's in international Associations Management course (Solvay Brussels School Economics & Management) and Coaching skills training (Leading & Coaching Academy) in Belgium. Since September 2020 she has been the Secretary General of FEDIAF.



Alice Tempel Costa

Technical Director, FEDIAF (2020 – present)

Alice Tempel Costa, holds a BSc in Agriculture from UFRGS, Brazil and a master's degree in Cooperation & Development from IUSS University in Pavia, Italy. She has over eight years' experience in European Trade Associations in Brussels. Before joining FEDIAF in September 2020, she worked for DG AGRI at the European Commission, FAO, Embrapa (The Brazilian Agricultural Research Corporation) and Wageningen University.



Katerina Alexopoulou

Junior Scientific & Regulatory Affairs Policy Advisor, FEDIAF (2022 – present)

Katerina Alexopoulou holds a Food Science and Nutrition BSc degree from the University of the Aegean and a master's degree in Food Safety and Quality Management Systems from the Agricultural University of Athens (Greece). She has worked in nutritional technical-scientific positions in both private and public sectors; from working in laboratories as researcher to being a medical delegate and then from freelancer nutritionist to safety and quality control microbiologist. Before joining FEDIAF, she worked on feed additives legislation, in the Animal Nutrition and Medicated feed directory at DG SANTE of the European Commission.



Giulia Aluffi

Junior Communications & Policy Officer, FEDIAF (2021 – present)

Giulia Aluffi pursued a bachelor's degree in European Studies at Maastricht University (Netherlands), where she learnt about the working of the European Union and its institutions. During this degree, she participated in the Erasmus+ programme that allowed her to attend a semester at the faculty of Political Science at the Vrije Universiteit Brussels (Belgium). Once she finished her Bachelor, she specialised further in European Studies with a Master focusing on the EU external relations at Maastricht University. Before joining FEDIAF as a trainee in September 2021, she gained first-hand experience in communications with a summer internship at the Brussels-based NGO Womenpreneur Initiative.

FEDIAF Members

FEDIAF has members associations representing 18 countries. FEDIAF also has five company members (Affinity Petcare, Hill's Pet Nutrition, Mars Petcare, Nestlé Purina PetCare and Wellpet).

öhtv

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FEDIAF Members



Spain

ANFAAC

Asociación nacional de fabricantes
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PFMA

The Pet Food Manufacturers' Association

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Hill's Pet Nutrition

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www.hillspet.com



Mars Pet Care

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www.mars.com



Nestlé Purina PetCare

Nestlé Purina PetCare Europe, Middle East, North
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www.purina.eu



WellPet

WellPet Belgium BVBA

Leonardo da Vincilaan 19

MC Square

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Belgium,

www.wellpet.com

Glossary

AGM	Annual General Meeting
AMFEP	Associations of Manufacturers and Formulators of Enzyme Products
BHA	Butylated Hydroxy Anisole
DG AGRI	European Commission Directorate-General for Agriculture and Rural Development
DG ENVI	European Commission Directorate-General for the Environment
DG GROW	European Commission Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs
DG SANTE	European Commission Directorate-General for Health and Food Safety
DG TRADE	European Commission Directorate-General for Trade
EC	European Commission
EF	Environmental Footprint
EFSA	European Food Safety Authority
ESWG	Environmental Sustainability Working Group
ESVCN	European Society of Veterinary & Comparative Nutrition
FEFANA	European Union trade association of the animal feed additives industry
FSFS	Framework for Sustainable Food Systems
GHG	Greenhouse Gas Emissions
IIA	Inception Impact Assessment
PFMA	Pet Food Manufacturers' Association
RED	The EU Renewable Energy Directive
RES	Renewable Energy Sources
SCoPAFF	Standing Committee on Plants, Animals, Food and Feed
SPS	Sanitary and phytosanitary measures
TASAG	FEDIAF Trade Associations Secretaries Action Group
TSE	Transmissible spongiform encephalopathies



EuropeanPetFood

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