



The European  
Pet Food Industry

FEDIAF  
**ANNUAL  
REPORT**

2020





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Pet Food Industry

# ANNUAL REPORT 2020



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Pet Food Industry



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Serving pets  
and their owners.

# A message from the outgoing FEDIAF President



The two years of my fulfilling Presidency of our excellent Federation have come to an end and I have to hand over to my successor.

The final months of my term of office have been marked by one of the largest crises Europe, and indeed the world, has experienced in recent decades. The COVID-19 crisis held a strong and unprecedented grip on our citizens, businesses, authorities and mostly the brave, courageous health profession.

In addition, our industry has been in permanent crisis mode. In view of border closures, necessary confinement measures by nearly all Member States and shopping restrictions, we had to ensure that we could continue producing and distributing pet food to millions of households and their pets. I can only thank authorities and operators that, despite the crisis, we were able to continue providing the necessary food for our beloved animals. It should not be forgotten that pets provide companionship and reassurance in particular in difficult times.

Our work over the past year has been as efficient as always. In our National Associations, Committees, Working Groups and Task Forces all members have remained committed to our common cause, which is to maintain and improve the regulatory environment for the supply of safe, nutritious and palatable pet food products.

We have also continued working on our main three pillars of safety, nutrition and consumer information, which are essential parts of our mission as a responsible industry. Our self-regulation documents on these three pillars are used throughout the industry, even beyond the EU, and increasingly by the authorities.

Having worked significantly on our contribution to environment and sustainability discussions over recent

years, following two meetings of our newly installed CEO Forum, we welcomed the EU's Green Deal. This is now a priority and we are committed to contributing our fair share for a greener environment. Further to our work on the EU project, which focused on the Product Environmental Footprint of pet food and the industrial emissions schemes, we will work on even more sustainable packaging for our products.

Our working groups have continued being active on additives approvals, where we experienced again the "solidarity" of our industry, working collaboratively for the common good. All members invested their fair share of time in the re-authorisation dossier for an important antioxidant for cat food and we developed our e-learning for labelling. One group achieved the adoption of the new EU Regulation on dietetic pet food and our Safety Guide was translated into all EU languages (thanks to the European Commission). Furthermore, our external trade remains important and our external communication proactively tells the many good stories we have. A big thanks to all within FEDIAF, sister associations and authorities having constructively accompanied us through the past year!

A special thank goes to our Secretariat in Brussels – which is undergoing significant changes: Julien Taieb, Deputy Secretary General, decided to pursue a new career at the European Institutions. For over five years, he was an integral and most efficient part of our organisation and we are all grateful for his excellent contributions. Our longstanding Secretary General, Thomas Meyer, decided that after nearly 23 years of service in the pet food industry, it would be time to hand over responsibilities to the younger generation by the end of 2020. "Mister Pet Food Europe", as he was sometimes nicknamed, steadily steered FEDIAF through the BSE crisis, the dioxin crisis and the numerous legislative measures of the EU White Paper on Food Safety.

We wish Julien and Thomas all the best for the future and extend our thanks to Jakub Rusek, the third staff member. The team of three was splendid to work with, and now we are looking forward to building a new team to match the previous one.

I thank you all for your confidence, cooperation and team spirit during my rewarding Presidency.

**Mechthild Exner-Herforth**

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

# Welcome and thanks from the FEDIAF Secretary



After nearly 23 gratifying years with the pet food industry it is a strange feeling that this should be my last foreword to a FEDIAF Annual Report!

I grew up without computers and the high-tech in communication in my first year at FEDIAF in 1998 was still the telefax, but fairly quickly the e-mail started: But in the beginning when I got e-mails, ten minutes later the sender called me to ask if I received his/her e-mail! A lot has changed since, indeed.

My previous jobs before joining FEDIAF were in a law firm, in the British Parliament and the European brewers' association – but I never lasted as long as with the pet food industry. There is something very special about our industry which makes the work much more pleasant: We work for two living beings, pets and their owners, and working in an atmosphere where the human animal bond is an integral part of the work philosophy is in fact what makes it so special.

During my career, I had eleven Presidents from nine different European countries, all had different management and leadership styles and under each President I acquired new thinking, new approaches and new ways of working. I never got bored and I am grateful for the engagement and commitment of all my Presidents – and sometimes of their patience as well.

Working in a European environment outside the national box, albeit having its challenges, was always fulfilling: Discussions at FEDIAF or EU meetings with people from different cultures is enriching and require diplomacy and flexibility to reach mutual trust and understanding with ensuing results. When we established the Global Alliance of Pet Food Associations, working for the global common cause became even more complex, but equally rewarding.

The complexity and the state-of-the art technologies of pet food production has never stopped fascinating me. There is no other consumer product in the world like pet food, which provides all the nutrients a pet requires on a daily basis for many, many years of a pet's healthy life.

Helping to shape EU rules and regulations in discussions with the European Parliament, the European Commission and, via the national associations, with national authorities perfectly fitted my "lawyer's brain". I thank all officials for the intellectually stimulating discussions.

The Brussels FEDIAF office was always composed of three staff members and despite some normal fluctuations over the years, the teamwork was always extremely pleasant. I cannot name and thank all having shared the office with me, but Penelope Stone, who spent 34 years at FEDIAF, remains the FEDIAF collaborator I will always think of first when remembering FEDIAF.

I hope my work has helped pet owners, officials and industry to achieve better and clearer regulations concerning pet food.

It would be lovely if the majority of employees could say, as me, this at their end of their career: I thank my industry, the stakeholders for a happy and fulfilling working life.

All the best for FEDIAF.

**Thomas Meyer**

A handwritten signature in blue ink, appearing to read 'Thomas Meyer', with a long horizontal flourish extending to the right.

# Overview of the Pet Food Industry in 2019 – key milestones:

1

## Feed Materials and Trade:

Navigating the Brexit challenge; establishing the UK as a 'third country'; adaptation of the microbiological criteria for raw pet food in line with human food standards; EU-Australia Free Trade Agreement first input.

2

## Environment and Sustainability:

The final adoption and publication of the Food Drink & Milk BREF; start working on policies for more sustainable packaging.

3

## Nutrition and Analytical Science:

Scientific Advisory Board Carbohydrate Expert Review and Fact Sheet.

4

## PARNUTs Task Force:

The finalisation of new PARNUTs regulation (EU)2020/354, following seven years of work.





### **Product Communication:**

The development of e-learning to facilitate the distribution and use of the Code of Good Labelling Practice for Pet Food among stakeholders.



### **Additives and Undesirable Substances:**

The team faced unprecedented challenges and secured improved withdrawal terms for cassia gum in addition to mitigating challenges to the use of BHA, BHT and Propyl Gallate.



### **Communications:**

Comprehensive review of communications strategy resulting in 89 pieces of coverage, 11 factsheets bringing total to 20 available online, plus launch of the film: 'How Pet Food is Made for Dogs and Cats' and responses to COVID-19 crisis to avoid containment measures for pet food production and retail.



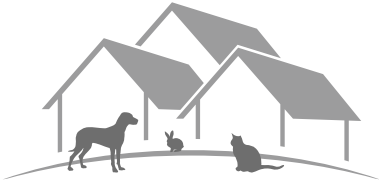
### **Feed Hygiene and Safety:**

Following FEDIAF work, the European Commission translated the Guide into all EU languages. Also, the merger of the GAPFA Safety and Trade workstreams.



# FACTS & FIGURES 2019

## European overview



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

**85 million households**  
(38% of all households)

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

EU:  
**Cats 24%**  
**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**

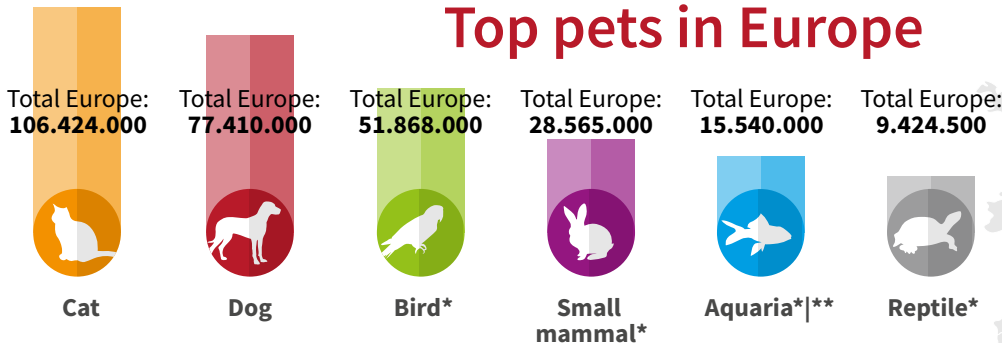


Annual value of pet related products and services:

**€ 8,7 billion accessories**  
**€ 11 billion services**  
**Total: € 19,7 billion**

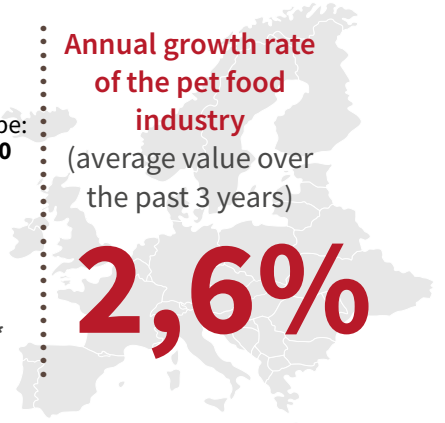


## Top pets in Europe



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

**2,6%**



\*excl. Baltic States | \*\* This corresponds to an estimated 300 million ornamental fish

# FACTS & FIGURES 2019

## Top pets in Europe

### Cat



Total European Union: **77.440.000\***

Total Europe: **106.424.000\***

### Dog



Total European Union: **58.400.000\***

Total Europe: **77.410.000\***

### Bird



Total European Union: **37.227.000\***

Total Europe: **51.868.000\***

### Small mammal



Total European Union: **21.271.000\***

Total Europe: **28.565.000\***

### Aquarium

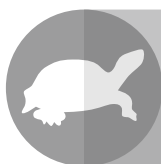
This corresponds to an estimated 300 million ornamental fish



Total European Union: **10.630.000\***

Total Europe: **15.540.000\***

### Reptile



Total European Union: **7.904.500\***

Total Europe: **9.424.500\***

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



## Introduction

The Feed Material and Trade Working Group comprises industry experts with a specific focus on 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 legislation related to maintaining human and animal health, in addition to providing safe raw materials for our industry, which makes any proposed amendment a challenge 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

### 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

In 2019 everybody was looking to the UK to understand when and how the country would leave the EU. 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.

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.

The UK became a third country on 1 February 2020 while the agreed transitional period would end on 31 December 2020. The future trade relationship between the EU and the UK is still under discussion and is closely monitored for gaps and opportunities.

### 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.
- **Key EU export markets (Ukraine/Russia/Turkey):** Monitoring developments and highlighting opportunities for improving cross border trade.

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



## Introduction

Environment and sustainability are at the top of the newly established European Commission's EU Agenda. The comprehensive set of measures outlined in the proposed EU Green Deal and the "Farm to Fork strategy" will shape the working environment within which pet food companies will operate.

In order to embrace the challenges ahead and contribute efficiently to the forthcoming policy shaping, FEDIAF has taken the decision to set up a brand new horizontal Working Group on Environment and Sustainability.

At its kick-off meeting in October 2019, a large group of experts from small, medium and large companies agreed on ways of working and defined key priorities for the years to come. There are two main focus areas: Product Environmental Footprint (PEF) & environmental communication in general plus packaging and packaging waste, which includes all EU and national developments on Extended Producers Responsibilities (EPR).

The activities of the Working Group will be boosted in the course of 2020. Internal cooperation with FEDIAF's Communication Working Group and strategic alliances with relevant stakeholders (food and feed chain sister organisations, packaging industry, NGOs) will be fostered.

## Objectives

FEDIAF's 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 favorable framework for more sustainable pet food production.

### More specifically, FEDIAF's aims are twofold:

- Contribute to the development of a voluntary and flexible policy framework for environmental product communication based on a robust PEF methodology and fair communication rules.
- Turn the challenge of the new packaging recycling targets set in the Packaging & Packaging Waste Directive into business opportunities, which drive innovation.

## Achievements

A key achievement and milestone for 2019 was the final adoption and publication of the Food Drink & Milk BREF.

The Best Available Techniques (BAT) and their Associated Emissions Permitted Levels laid down in the final reference document are fully in line with FEDIAF proposals. This should enable pet food manufacturing plants to smoothly renew their working permits while maintaining high environmental standards on industrial emissions.

# C. Nutrition and Analytical Science

Highlights from  
FEDIAF Groups

## 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 cooperation 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

### FEDIAF released the Scientific Advisory Board Carbohydrate Expert Review and Fact Sheet.

The Scientific Advisory Board, under the lead of Prof. Patrick Nguyen, developed this Expert Review to provide fact-based information, in response to controversy around the role of carbohydrates in pet nutrition. The expert review is tailored for veterinarians and pet professionals.

In addition, under the lead of Dr Cecilia Villaverde and Dr Marta Hervera from the Scientific Advisory Board, a pet-owner friendly fact sheet was developed and published.

The factsheet explains the role of carbohydrates in companion animal diets in a consumer-friendly style.

Both documents are designed to help bust myths questioning the nutritional value of carbohydrates. The release of both documents was accompanied by FEDIAF press releases.

### FEDIAF and ASSALCO present publications at veterinary congress in Turin.

FEDIAF and its Italian member association, ASSALCO, attended the 23rd European Society of Veterinary and Comparative Nutrition (ESVCN) Congress in Turin. The annual congress provided a great opportunity to connect with many nutrition scientists and experts, in addition to discussing the work of the pet food industry.

FEDIAF and ASSALCO had a stand, distributing free copies of the FEDIAF Nutritional Guidelines, Safety Guide, Labelling Code and the Carbohydrate Expert Review.

In addition, participants were invited to fill in a short survey regarding the quality of these publications. Among the respondents, 98% had used the FEDIAF Nutritional Guidelines; 69% rated the quality as very good and 31% as good. FEDIAF also asked how likely participants were to recommend the Guidelines and secured an excellent NPS (Net Promoter Score) of 78%.









## **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 ageing. Pet foods for PARTICULAR NUTRITIONAL purposes (PARNUTs) are designed to address these specific needs.

At the end of 2011, the EU discussed abolishing the longstanding legislation for these 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 update of the longstanding regulation covering those diets is the mission of the task force in order to create a clear regulatory framework.

## **Objectives**

- Collate the latest science on dietetic nutrition for cats and dogs, for each of the 17 particular nutritional purposes in the scope of the task force. Scientific consensus and transparency are the key backbone to the task force's work. All proposals were shared with the Industry before being assessed by the European Commission and independent national scientific agencies.
- Provide DG SANTE with scientific dossiers, including compliance criteria, so that the essential nutritional characteristics of the historical 17 PARNUTs can be updated and measured.

## **Achievements**

- Three amendments published in 2014 and 100% of dossiers submitted by the end of 2017.
- In 2019, the Commission worked on a draft regulation covering 16 entries out of the 17, and the task force contributed to its finalisation.
- The new PARNUTs regulation (EU)2020/354 was published in the EU Official Journal in March 2020. The task force welcomes this publication and thanks all parties who were involved in this work. The task force will concentrate its work on the finalisation of the last remaining dossier on oxalate stones formation.



# e. Product Communication Working Group

## Introduction

The Product Communication Working Group comprises experts in the field of labelling, with excellent technical and legal knowledge. Pet food labelling has evolved over recent years. From a simple pack with a minimal amount of information, current product communication includes complex and content-dense packs, in addition to TV-advertisements, complementary online information, colourful leaflets, etc. As a result, the Working Group has a broad remit, which takes all these kinds of product communication into consideration.

Most of this “new” information is non-compulsory and not covered by official EU regulations. Therefore, it needs to be self-regulated by the industry. All consumers and markets, including those involving pet food, evolve in parallel. In this environment, our products need to be organised according to characteristics such as organic, grain free and those with “natural” claims.

Pet food, although under the umbrella of regulation for animal feed, has its own specificities. FEDIAF has to ensure that these special characteristics are taken into account by EU authorities:

- Most pet food packs are preprinted, thus even minor changes in legal labelling have a very high economic and environmental impact.
- Most pet food products are complete (i.e. the only meal for an animal). For this reason complete products need to ensure that all required nutrients are present and at adequate quantities (and this includes the use of a great variety of feed additives).

## Objectives

- Develop, maintain and update the Code of Good Labelling Practice for Pet Food (as established by Article 25, R. 767/2009/CE) as the main tool for the pet food industry to establish a “level playing field” in terms of product communication.
- Ensure the Code is used by all stakeholders (manufacturers, enforcement authorities, retailers, online shops, etc.).
- Monitor regulatory and market challenges which require a common position from the pet food industry in the field of labelling and product communication.

- Work together with the European Commission to ensure pet food’s specificities in terms of labelling are taken into consideration.

## Achievements

In 2018 the new version of the Code was approved and endorsed by the EU Commission, following the hard work of the working group. Once approved, the Product Communication Working Group has been focused on the development and deployment of the Code. This includes the creation and delivery of training material:

- **Training slides:** to be used by National Associations in order to share and spread the Code to their associates, stakeholders and control authorities.
- **E-learning:** a more innovative, interactive and user friendly training system will be ready in 2020 for everybody who wants to further increase their knowledge of labelling requirements. This important resource will be available for a variety of customer IT platforms (Windows, Android, iOS, ...).

As the Code is a “living document”, once the second version had been approved, the Working Groups started work on the new version of the Code, which means including new chapters, updating some of the old ones and adding new examples.





## 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 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 will be 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.

## Achievements

Following FEDIAF's request, in the second half of 2019, the European Commission began the translation process of the Guide into all EU languages. All linguistic versions of our reference document have been finalised and will be made available on the DG SANTE and FEDIAF websites after final linguistic checks.

## GAPFA Achievements

- Due to their common focus and to maximise synergies, the GAPFA Safety workstream was merged with the GAPFA Trade workstream.
- A number of safety and trade related GAPFA factsheets were co-drafted with the GAPFA communication workstream and made available to national associations so that they can speak with one voice.

- Approval of a GAPFA raw materials of animal origin principles paper: Only safe raw materials from healthy animals from approved/registered establishments may be used for pet food production.
- The main focus of the GAPFA workstream continues to be working with OIE so that pet food is recognised by the organisation, ensuring the ease of international trade. OIE rules allow the free trade of commodities of animal origin if they comply with OIE specifications:
  - Assessment of OIE listed animal disease risks, which are mitigated by pet food production processes and if these mitigation processes are or can be included in OIE standards.
  - First draft prepared by FEDIAF as project leader to include pet food in the OIE Terrestrial Animal Health Code.
  - Longer term aim of having an OIE pet food model health certificate for international trade.
- Work started on import tariffs and potential non-tariff barriers
  - Specific animal diseases (e.g. Salmonella, African swine fever).
  - Product registration requirements.





# g. 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 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, is 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

- Working group has faced unprecedented challenges over the last 12 months and has made significant progress in a number of challenging cases, broadening our network to include key applicants and trade association partners.
- **Antioxidant Portfolio:** Responding to dynamic situation across BHA, BHT and Propyl Gallate, liaising with a broad coalition of partners to mitigate the impact of historically incomplete dossiers and preserve ingredients for future use.
- **Cassia Gum:** Securing improved withdrawal terms for users of semi-refined material whilst commissioning studies to explore re-authorisation of feed grade cassia gum and to have improved efficacy provision, i.e. permitting more thickeners than carrageenan in conjunction with cassia.
- **Undesirable Substances:** Continued the mycotoxin survey. Also, exploring potential to extend survey covering other substances of interest to regulatory authorities and consumer groups.



### Introduction

Now in its third year, the reinvigorated Communications Working Group continues to work hard to raise the profile of FEDIAF engaging with our internal and external audiences. The aims are to build trust and transparency in addition to positioning ourselves as the voice of the European pet food industry. We achieve this through our regular communications in the form of our ever-evolving website, events, newsletters, press releases, factsheets, and more recently establishing our presence on LinkedIn.

The work of the group has become increasingly strategic, refining the stakeholder engagement plan and assessing how we can make an impact.

We are delighted that our group is growing with two new representatives on board.

### Objectives

- Drive reputation to shape our business environment.
- Drive awareness of FEDIAF Codes and compliance.
- Drive a positive attitude across our stakeholders regarding the role of Pets in Society.


### Achievements

- Comprehensive review of communications objectives, strategy and stakeholder engagement plan.
- Published five press releases sharing news on FEDIAF events (AGM, CEO Forum and participation at ESVCN), the launch of the 2019 industry facts and figures, and a focus on FEDIAF priorities by President Mechthild Exner-Herforth.
- Between June 2018-June 2019, FEDIAF PR generated 89 pieces of coverage.
- Published 11 factsheets on a range of topics including nutrition, quality and safety and sustainability. We now have a total of 20 factsheets available online.
- Launched a short film on 'How Pet Food is Made for

Dogs & Cats'; this film has subsequently been adapted by a number of national associations.

- All FEDIAF Codes upgraded with the new-look professional design ready for the Experts Reception in April.
- Attended ESVCN in September and surveyed the delegates on awareness of FEDIAF (98% aware), use of industry Codes of Practice and quality of our educational resources.
- Participated in five events (industry and veterinary) delivering presentations on the work of FEDIAF.
- Continued our media partnership with Pets International with two FEDIAF articles published.
- Interview with Thomas Meyer in *EspeciesPRO* (trade journal based in Spain).
- Ensured a regular flow of internal communication with the FEDIAF newsletter delivered to the membership.


## FACT SHEET



### Carbohydrates in dog and cat food

**What are dietary carbohydrates?**

Carbohydrates ("Carbs") are a group of compounds with a common biochemical structure based on carbon (C), hydrogen (H) and oxygen (O). Carbohydrates include sugars, starches and dietary fibres. The simplest molecules within carbohydrates are sugars (monosaccharides and disaccharides). Longer chains and structures made of those sugars are complex carbohydrates (like starches, polysaccharides) and dietary fibres (oligo and polysaccharides). Sugars and starches are called digestible carbohydrates.



**digestible**

**sugars**

Sugars are the basic building blocks of carbohydrates. Examples include glucose, galactose, fructose (fruit sugar, found in honey and fruits), sucrose (table sugar), maltose, and lactose (milk sugar).

**starch**


Starch is built by long chains of glucose units joined together. Starch is the main energy storage in plants.

**not digestible**

**fibres**

Fibres are oligo or polysaccharides, but in contrast to starch, cannot be digested by dogs, cats or humans due to the nature of the links that bind the sugar units. Fibres are energy storage in plants (e.g. inulin) or provide structure to the plant cells (e.g. cellulose).


## FACT SHEET



### How pet food is regulated

**Introduction**

**Pet food is regulated at every stage in developed countries, from the ingredients used and the production process, through to marketing and sales. Much of the legislation applies to pet food in the same way as it does to human food.**



Often more detailed regulations cover both farm food and pet food with specific legal provisions that are only applicable to pet food. Additionally, the pet food industry established self-regulation through a series of Industry Codes or Guides. These provide comprehensive explanations on how to implement the legislation or establish guidance on fields that are not regulated by law.

The objective of legislation and self-regulation is to ensure that pet food products fulfil the nutritional need of pets, are safe for both animals and people, and that the information to consumers is accurate and truthful.

Whenever pet food is manufactured, it has to meet legal requirements established by the country or region in which it is sold. The following sections describe the way pet food is regulated in the European Union.

**European Union**

Within the European Union (EU) there are three main legislative bodies – the European Commission proposes legislation, the EU Parliament and Council of the European Union adopt legislation (EU-decisions). Implementing rules can be adopted in legislating committees chaired by the Commission and composed of Member States' representatives.

These bodies are responsible for developing and adopting all legislation concerning food and animal feed, including pet food. The EU Member States, on the other hand, are responsible for the implementation and control of correct application of the EU legislation. In EU legal texts, a distinction is made between the terms "food", which is reserved for foodstuffs for humans and "feed" which is designated to animal feeding stuffs, including pet food.

**Pet food safety**

Two laws set the basic principles for food and feed safety: "general food law" (Regulation 178/2002) – which also applies to feed, and "food hygiene" (Regulation 1831/2003).

The Animal By-Products Regulations 1009/2009\* and 142/2011\* provide detailed rules on the safety of raw materials of animal origin used in pet food, the pet food processing requirements, and include model health certificates for imports to the EU.

Regulation 998/2001\* on protective measures against transmissible spongiform encephalopathies (TSE) lays down restrictions concerning specified risk materials (parts of ruminants with high risk of TSE prions), import/export restrictions and rules on processed animal proteins (meat meals).

Regulation 1831/2003\* regulates the additives permitted in animal feed and, as applicable, their maximum limits. All additives have to be evaluated on their safety and efficacy by the European Food Safety Authority before being used in animal feed. All approved additives are listed in an official European Feed Additives Register\*.

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# PETfood PROCESSING

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## FEDIAF issues new regulation for solutions-based pet foods






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FEDIAF would like to say thank you to all the key workers in the pet industry, working tirelessly to ensure that we can continue to supply food for the 80 million pet-owning households in Europe. Watch our video here: <https://bit.ly/2RIBYBF> #foodheroes #petfood #thankyou #covid19

Übersetzung anzeigen



Thank You to everybody working in the pet food industry for your care for the welfare of all pets!

#foodheroes

www.fediaf.org

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## FACTS & FIGURES 2019 European Overview

Estimated number of European Union households owning at least one pet animal	85 million households
Estimated percentage of European households owning at least one cat or one dog	EU: Cats 24%   Dogs 25% Europe: Cats 25%   Dogs 24%
Number of pet food producing companies	132 pet food producing companies 200 production plants (incl.)
Estimated Employment	Direct employment pet food industry: 100.000 Indirect employment: 900.000
Annual sales of pet food products	Volume: 8.5 million tons Turnover: € 21 billion
Annual value of pet related products and services	€ 8.7 billion accessories € 11 billion services Total: € 19.7 billion
Annual growth rate of the pet food industry (average value over the past 3 years)	2.6%



Sources: Figures from CECEA and its member associations, pet food companies and associations based information when included European Union/Europe. \*European Union\* includes the 28 Member States of the EU whereas \*Europe\* includes Member States of the Council of Europe.

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# 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.



**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.

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).

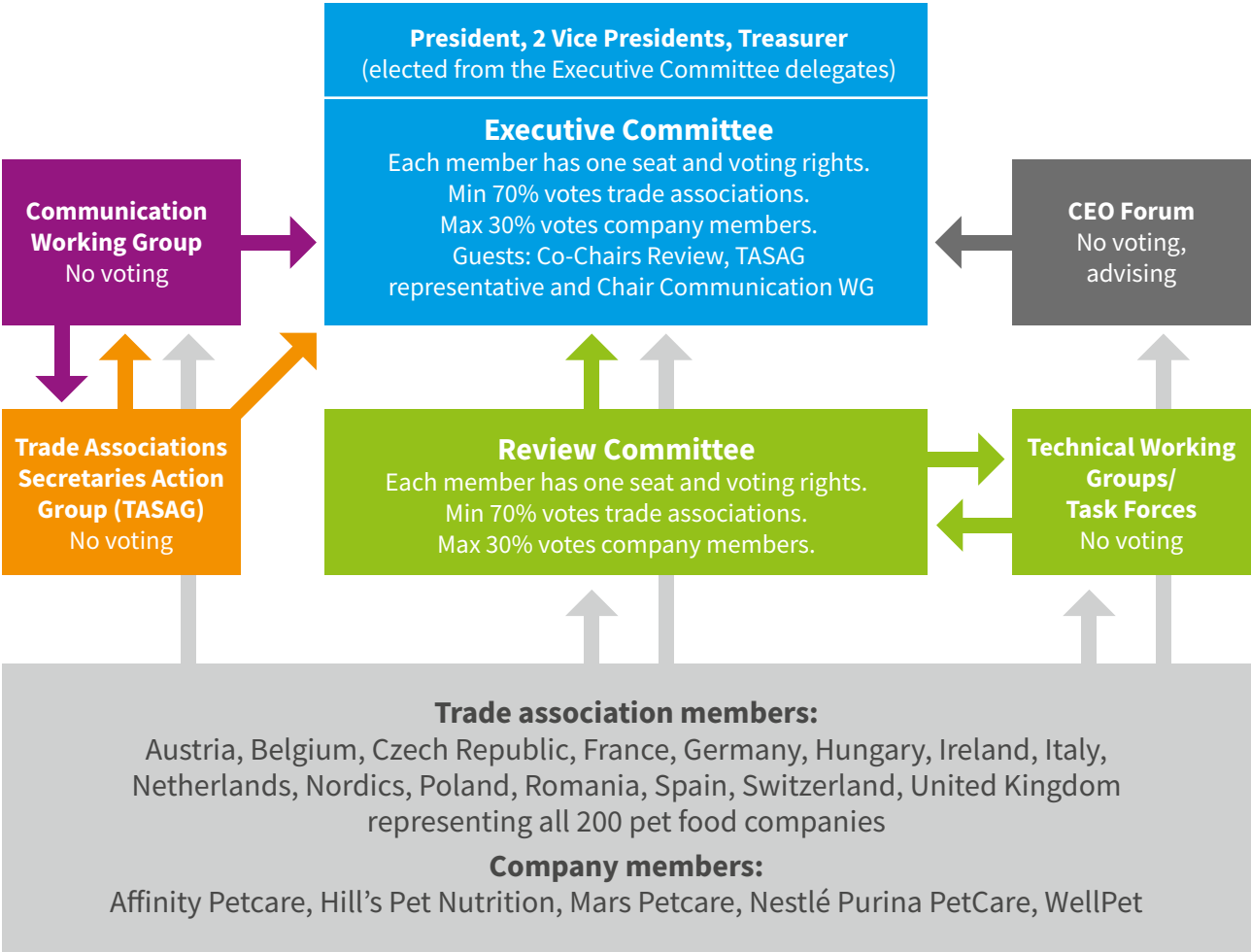


**Jakub Rusek,**  
**Policy Adviser, FEDIAF**  
**(2018 – present)**

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  
Katrín Langner – TASAG representative  
Lina Lopez – WellPet  
Pietro Molteni – ASSALCO  
Thomas Neumann – IVH  
Annet Palamba – NVG and Chair of the Communication Working Group  
Victor Romano – ANFAAC  
Kerstin Schmeiduch – Nestlé-Purina PetCare

## **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  
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  
Katrín Langner – IVH  
Ewa Lucyk – BEPEFA  
Maciej Przewdziaik – POLKARMA  
Tamás Racskó – FHF  
Miriam Ryan – PFAI  
Elie Van Stichel – BEPEFA

## **Communication Working Group**

Co-Chair: Annet Palamba – Hill's Pet Nutrition  
Co-Chair: Nicole Paley – PFMA  
David Ambrosius – nolte PR  
Aurélie Bynens – FACCO  
Greta Drumstaitė – Nestlé Purina PetCare  
Balázs Pályi – Mars Petcare  
Clémentine Jean-Philippe – Nestlé Purina PetCare  
Dieter Meyer – Vitakraft  
Detlev Nolte – nolte PR

## **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  
Gerd Grossheider – Gimborn  
Kounawit Heng – Nestlé Purina PetCare  
Pierre Jaouen - Sopral  
Jerome Naar – Royal Canin  
Adriana Oraczewska-Podolska – 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

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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 – Neodis  
Jean Christophe Bouthegourd – Nestl  Purina PetCare  
Lisa Conboy – Nestl  Purina PetCare  
Petra Hellweg – Mars Petcare  
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  
Dennis Smit - United Petfood  
Celina Torre – Affinity Petcare  
Ingrid Van Hoek – Royal Canin  
Hilde Vanwallegghem – 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  
Bal zs P lyi – Mars Petcare

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  
Irina Derksen – Hill’s Pet Nutrition  
Francisco Gisbert – Affinity Petcare  
Marta Maria Lacavalla – Nestl  Purina PetCare  
Ines M nzelfeld – Mars Petcare  
Stephane Peeters – Spectrum Brands  
Ilara Pesci – Royal Canin  
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: Isabelle Aelvoet – Mars Petcare  
Omar Barcellona – Nestl  Purina PetCare  
Martin Kaczara – Hill’s Pet Nutrition  
Franz Kainz – Ospelt  
Amaya Lopez – Pet Select  
Helena Kohlhaas – Vet-Concept  
Pierre Martinez – Virbac  
C dric Moulin – Nestl  Purina PetCare  
Jerome Patte – Virbac  
Bal zs P lyi – Mars Petcare  
Caroline Ploux – Mars Petcare  
Laetitia Rouille – Nestl  Purina PetCare  
Eva Ruiz – Mars Petcare  
Christian Sch nemann – IVH  
Amanda Valverde – Affinity Petcare  
Maarten van den Broek – Royal Canin  
Paula Wartelski – Nestl  Purina PetCare  
Aleř Weiner – Partners in Pet Food

# FEDIAF Members

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# FEDIAF Members

FEDIAF has 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**

öhtv  
Österreichische Heimtierfuttermittel Vereinigung  
c/o Fachverband der Nahrungs-  
und Genussmittelindustrie  
Zaunergasse 1 – 3  
1030 Wien  
Austria  
T: +43 1 7122121-0  
[info@oehtv.at](mailto:info@oehtv.at)  
[www.oehtv.at](http://www.oehtv.at)

## **Belgium**

BEPEFA  
Belgian Pet food Association  
Rue de l'Hôpital, 31  
1000 BRUXELLES  
Belgium  
[info@bepefa.eu](mailto:info@bepefa.eu)  
[www.bepefa.eu](http://www.bepefa.eu)

## **Czech Republic**

SVPDZ  
Sdruzeni vyrobcu potravy pro domaci zvirata  
Prazska 320  
257 21 Porici nad Sazavou  
Czech Republic  
[svpdz@svpdz.cz](mailto:svpdz@svpdz.cz)  
[www.svpdz.cz](http://www.svpdz.cz)

## **Denmark**

## **Finland**

## **Norway**

## **Sweden**

NPFA  
Nordic Pet Food Association  
c/o MLDK – Mærkevarerleverandørerne  
Dirch Passers Alle 76, 3. sal  
2000 Frederiksberg  
Denmark  
T: +45 33 13 92 92  
[indsigt@mldk.org](mailto:indsigt@mldk.org)  
[www.npfa.dk](http://www.npfa.dk)

## **France**

FACCO  
Chambre syndicale des fabricants  
d'aliments pour chiens, chats, oiseaux et autres animaux  
familiers  
46, Boulevard de Magenta  
75010 PARIS  
France

T: +33.1.48.03.29.11  
F: +33.1.40.18.15.43  
[facco@facco.fr](mailto:facco@facco.fr)  
[www.facco.fr](http://www.facco.fr)

## **Germany**

IVH  
Industrieverband Heimtierbedarf e.V.  
Postfach 11 06 26  
40506 DÜSSELDORF  
Germany  
T: +49.211.59.40.74  
F: +49.211.59.60.45  
[info@ivh-online.de](mailto:info@ivh-online.de)  
[www.ivh-online.de](http://www.ivh-online.de)

## **Hungary**

FHFI  
Federation of Hungarian Food Industries  
Bécsi út 126-128.  
1034 BUDAPEST  
Hungary  
T: +36 30 197 53 88  
[tamas.racsko@elelmszeripar.hu](mailto:tamas.racsko@elelmszeripar.hu)  
[www.elelmszeripar.hu](http://www.elelmszeripar.hu)

## **Ireland**

PFAI  
The Pet Food Association of Ireland  
Confederation House  
84-86, Lower Baggot Street  
Dublin 2  
Ireland  
T: +353.1.660.10.11  
F: +353.1.661.28.70  
[miriam.ryan@ibec.ie](mailto:miriam.ryan@ibec.ie)

## **Italy**

ASSALCO  
Associazione Nazionale tra le Imprese per  
l'Alimentazione e la Cura degli Animali da Compagnia  
Piazza di Spagna, 35  
00187 ROME  
Italy  
T: +39 06 69 20 08 98  
F: + 39 06 69 29 54 05  
[assalco@assalco.it](mailto:assalco@assalco.it)  
[www.assalco.it](http://www.assalco.it)



# FEDIAF Members

## Netherlands

NVG  
Nederlandse Voedingsindustrie  
Gezelschapsdieren  
Postbus 693  
4200 AR GORINCHEM  
Netherlands  
T: + 31.183.64.50.23  
F: + 31.183.62.11.61  
[nvg@atriumgroep.nl](mailto:nvg@atriumgroep.nl)  
[www.nvg-diervoeding.nl](http://www.nvg-diervoeding.nl)

## Poland

POLKARMA  
Polish Pet Food Manufacturers' Association  
ul. Woronicza 31/152,  
02-640 Warszawa  
Poland  
T: +48.22.646.88.18  
[sekretariat@polkarma.pl](mailto:sekretariat@polkarma.pl)  
[www.polkarma.pl](http://www.polkarma.pl)

## Romania

ARPAC  
Asociatia Romana a Producatorilor  
de Hrana pentru Animale de Compagnie  
Str. Stirbei Voda, 26-28  
Union International Center II  
9th Floor, sect. 1  
Bucharest  
Romania  
T: +40 21-314.02.00  
F: +40 21-314.02.90  
[office@arpac.ro](mailto:office@arpac.ro)  
[www.arpac.ro](http://www.arpac.ro)

## Spain

ANFAAC  
Asociación nacional de fabricantes  
de alimentos para animales de compañía  
c/ San Agustín, 15-1° derecha  
28014 MADRID  
Spain  
T: +34.91.369.21.34  
F: +34.91.369.39.67  
[anfaac@anfaac.org](mailto:anfaac@anfaac.org)  
[www.anfaac.com](http://www.anfaac.com)

## Switzerland

VHN  
Verband für Heimtiernahrung  
Thunstrasse, 82  
3000 BERN 6  
Switzerland  
T: +41.31.356.21.21  
F: +41.31.351.00.65  
[info@vhn.ch](mailto:info@vhn.ch)  
[www.vhn.ch](http://www.vhn.ch)

## United Kingdom

PFMA  
The Pet Food Manufacturers' Association  
Aviation House, 125 Kingsway  
London WC2B 6NH  
United Kingdom  
[info@pfma.org.uk](mailto:info@pfma.org.uk)  
[www.pfma.org.uk](http://www.pfma.org.uk)

## Affinity Petcare

Plaça d'Europa, 54-56,  
08902 L'Hospitalet de Llobregat  
Spain  
[www.affinity-petcare.com/en](http://www.affinity-petcare.com/en)

## Hill's Pet Nutrition

Grabetsmattweg  
4106 Therwil  
Switzerland  
[www.hillspet.com](http://www.hillspet.com)

## Mars Petcare

Eitzer Str. 215  
27283 Verden  
Germany  
[www.mars.com](http://www.mars.com)

## Nestlé Purina PetCare

Nestlé Purina PetCare Europe, Middle East, North Africa (EMENA)  
Av. Nestlé 55  
1800 Vevey  
Switzerland  
[www.purina.eu/](http://www.purina.eu/)

## WellPet

WellPet Belgium BVBA  
Leonardo da Vincilaan 19  
MC Square  
1831 Machelen, Diegem  
Belgium  
[www.wellpet.com](http://www.wellpet.com)

# Glossary

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

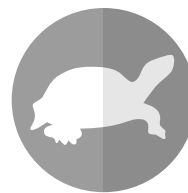
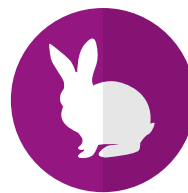
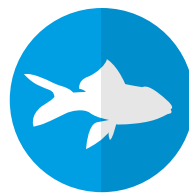


The European  
Pet Food Industry

# European Facts & Figures 2019

# FACTS & FIGURES 2019 European Overview

<b>Estimated number of European Union households owning at least one pet animal</b>	85 million households
<b>Estimated percentage of European households owning at least one cat or one dog</b>	EU: Cats 24%   Dogs 25% Europe: Cats 25%   Dogs 24%
<b>Number of pet food producing companies</b>	132 pet food producing companies 200 production plants (est.)
<b>Estimated Employment</b>	Direct employment pet food industry: 100.000 Indirect employment: 900.000
<b>Annual sales of pet food products</b>	Volume: 8.5 million tons Turnover: € 21 billion
<b>Annual value of pet related products and services</b>	€ 8.7 billion accessories € 11 billion services Total: € 19.7 billion
<b>Annual growth rate of the pet food industry (average value over the past 3 years)</b>	2.6 %



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

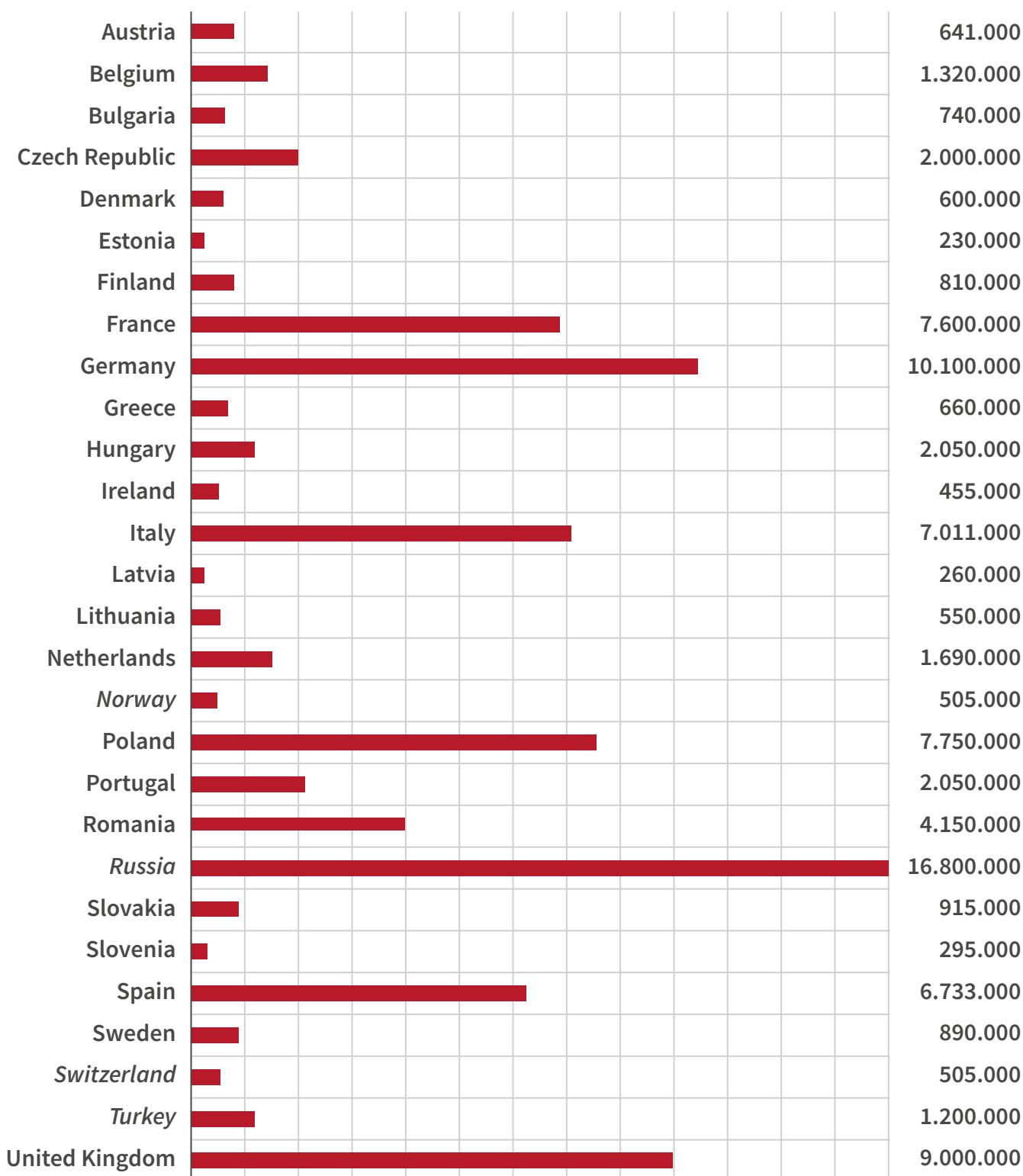
# FACTS & FIGURES 2019

## European dog population



Total European Union: 58.400.000

Total Europe: 77.410.000



Non EU Member States indicated with italics

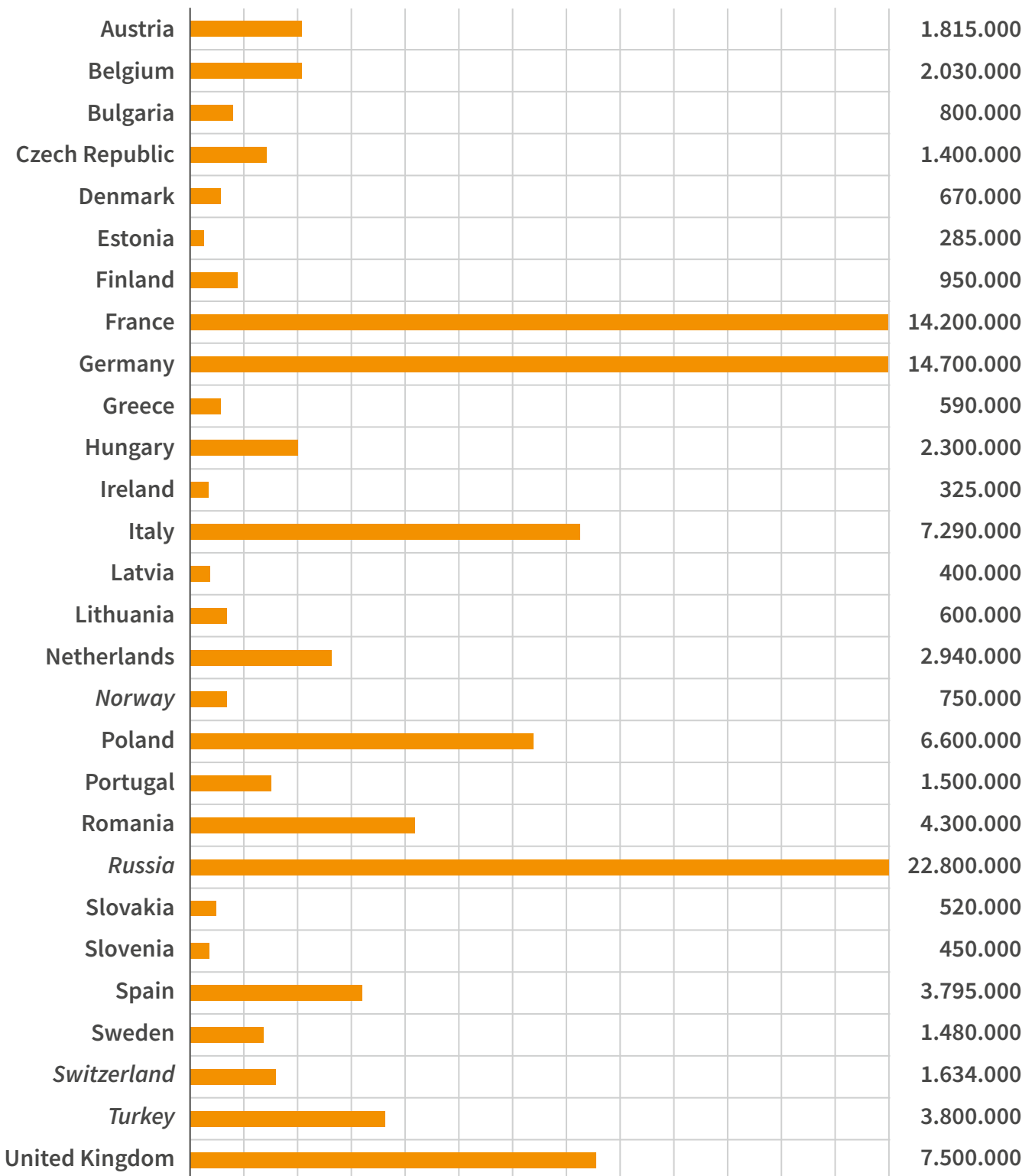
Sources: Figures from FEDIAF and its member associations, pet food companies and estimations based thereupon when indicated  
European Union/Europe: "European Union" includes the 28 Member States of the EU whereas "Europe" includes Member States of the Council of Europe

# FACTS & FIGURES 2019

## European cat population



Total European Union: 77.440.000  
 Total Europe: 106.424.000



*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 2019

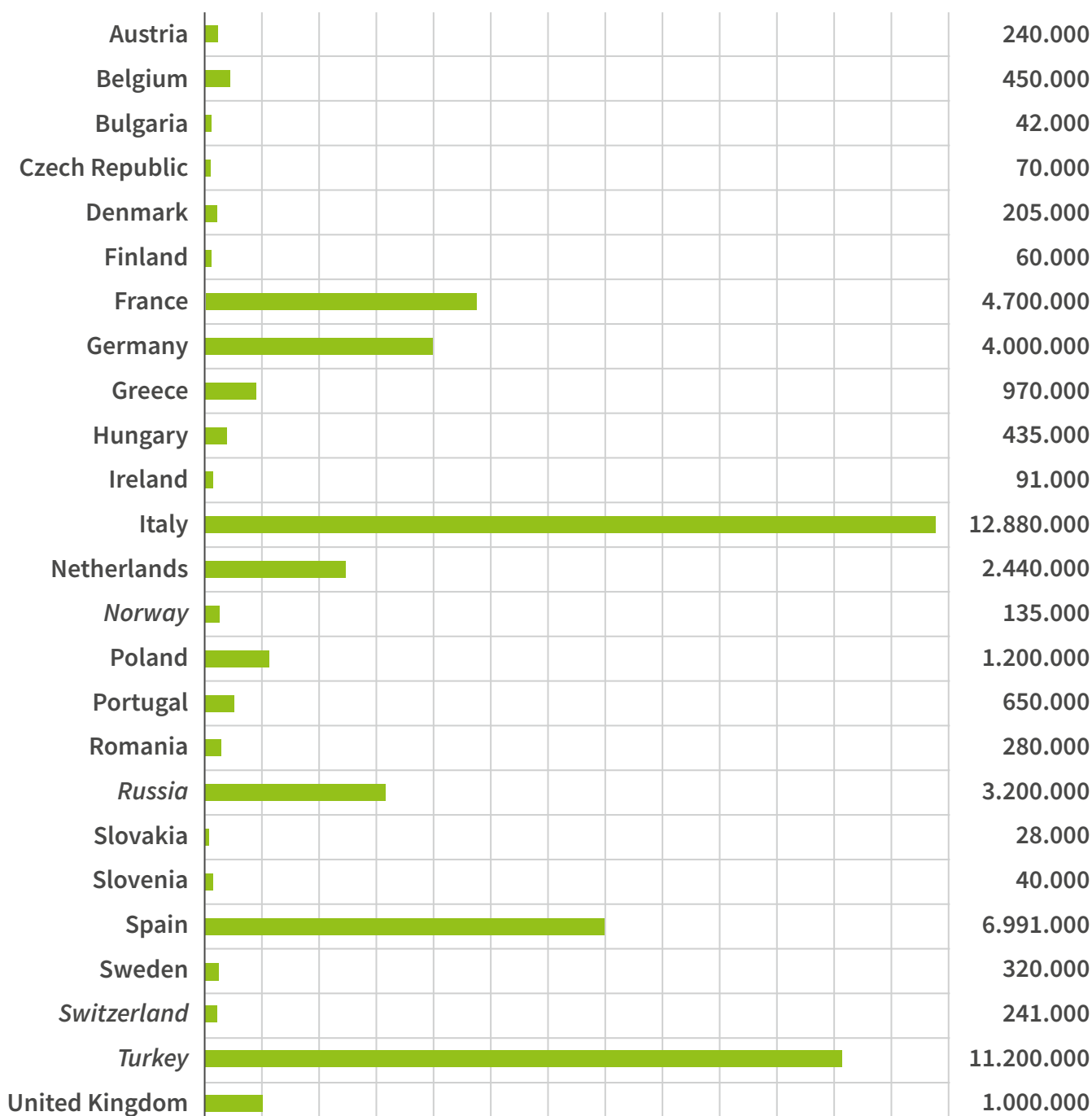
## European ornamental bird population



Total European Union: 37.227.000

Total Europe: 51.868.000

(excl. Baltic States)



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

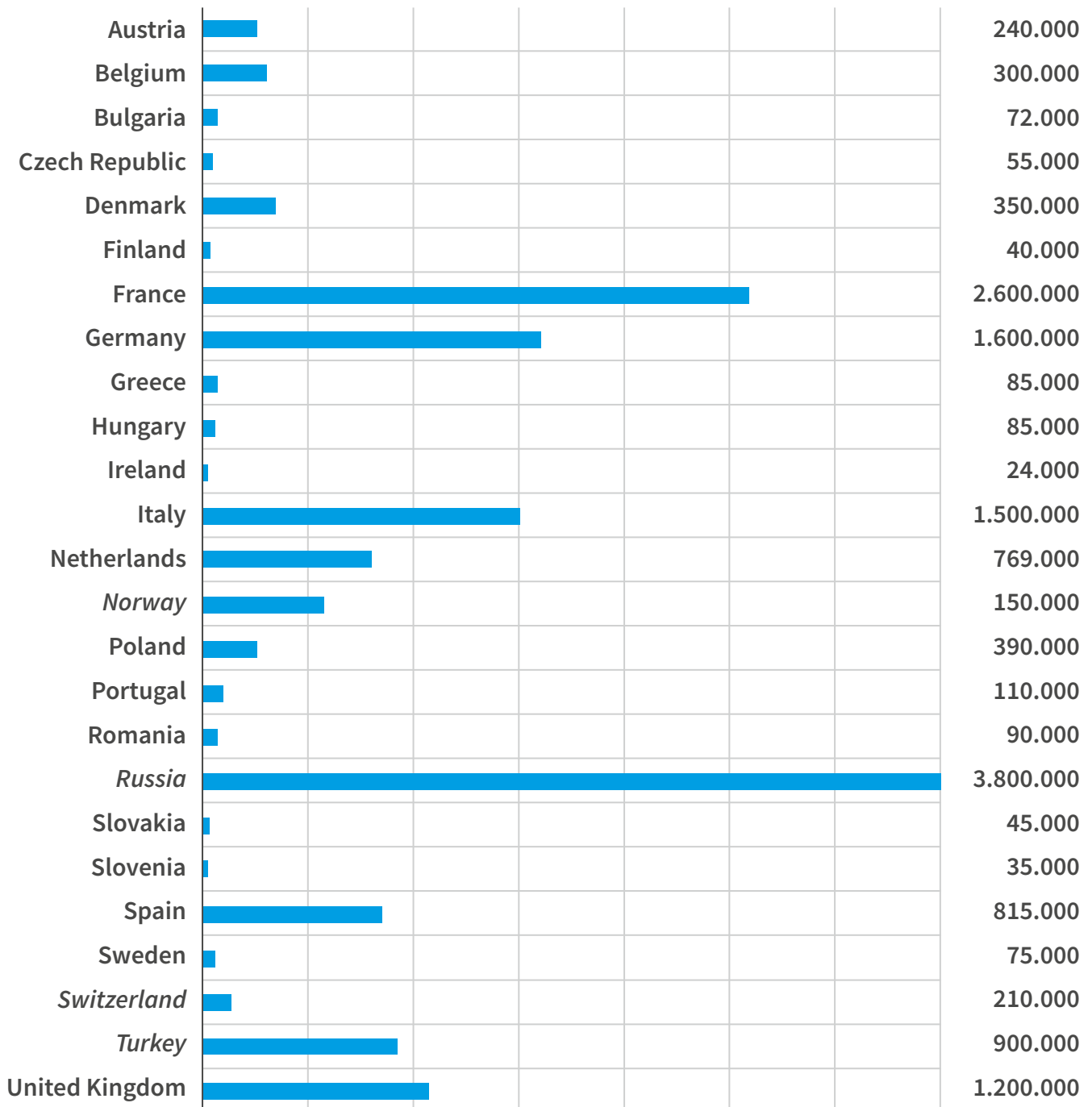
# FACTS & FIGURES 2019

## Estimated number of European aquaria



Total European Union: 10.630.000  
Total Europe: 15.540.000

(excl. Baltic States)



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



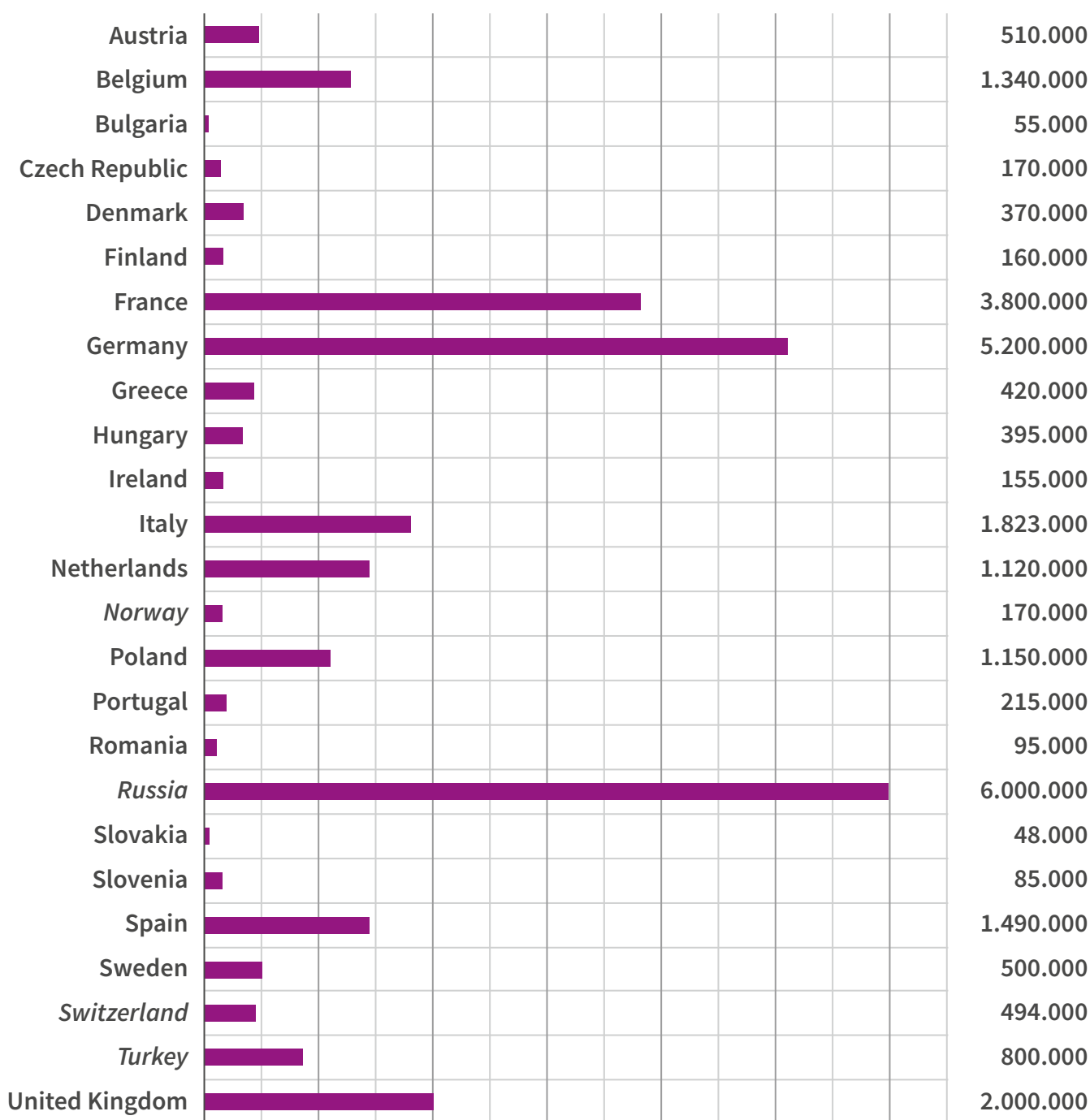
# FACTS & FIGURES 2019

## European small mammal population



Total European Union: 21.271.000  
 Total Europe: 28.565.000

(excl. Baltic States)



*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

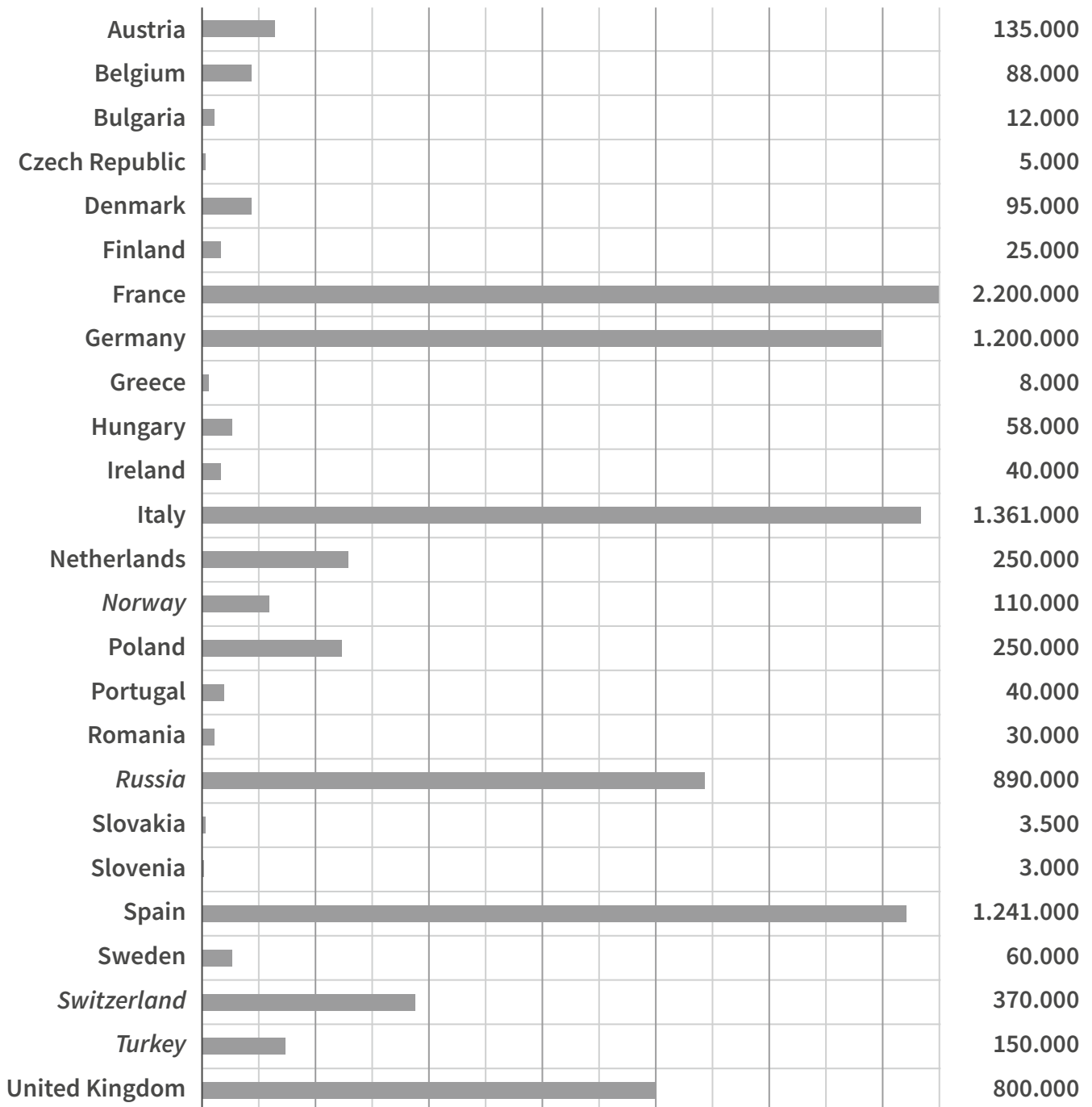
# FACTS & FIGURES 2019

## European reptile population



Total European Union: 7.904.500  
Total Europe: 9.424.500

(excl. Baltic States)



Non EU Member States indicated with italics

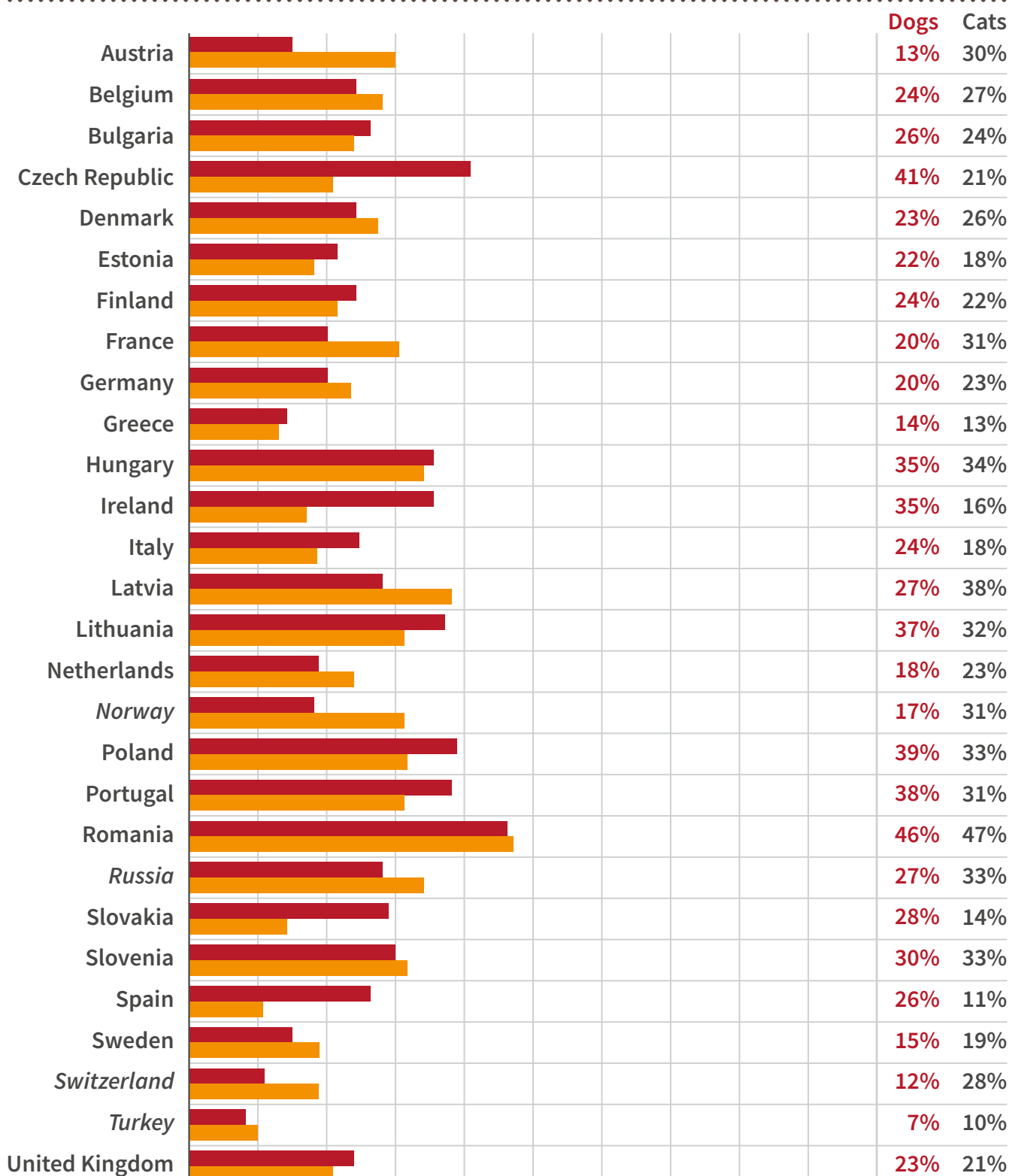
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European Union/Europe: "European Union" includes the 28 Member States of the EU whereas "Europe" includes Member States of the Council of Europe

# FACTS & FIGURES 2019

## Estimated percentage of ...



### European households owning at least one cat or one dog

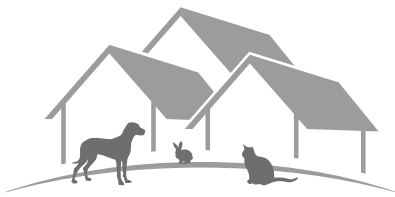


Non EU Member States indicated  
with italics

Sources: Figures from FEDIAF and its member associations, pet food companies and estimations based thereupon when indicated  
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# FACTS & FIGURES 2019

## European overview



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

**85 million households**  
(38% of all households)

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

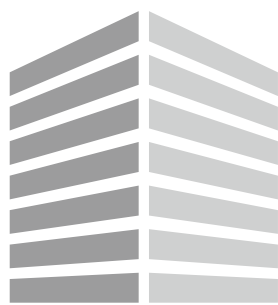
EU:  
**Cats 24%**  
**Dogs 25%**

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:

**€ 8,7 billion accessories**  
**€ 11 billion services**  
**Total: € 19,7 billion**



## Top pets in Europe



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

**2,6%**

\*excl. Baltic States | \*\* This corresponds to an estimated 300 million ornamental fish

# FACTS & FIGURES 2019

## Top pets in Europe

### Cat



Total European Union: **77.440.000\***

Total Europe: **106.424.000\***

### Dog



Total European Union: **58.400.000\***

Total Europe: **77.410.000\***

### Bird



Total European Union: **37.227.000\***

Total Europe: **51.868.000\***

### Small mammal



Total European Union: **21.271.000\***

Total Europe: **28.565.000\***

### Aquarium

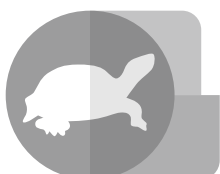
This corresponds to an estimated 300 million ornamental fish



Total European Union: **10.630.000\***

Total Europe: **15.540.000\***

### Reptile



Total European Union: **7.904.500\***

Total Europe: **9.424.500\***

Sources: Figures from FEDIAF and its member associations, pet food companies and estimations based thereupon when indicated  
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 \*excl. Baltic States



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The European  
Pet Food Industry

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