



The European
Pet Food Industry



FEDIAF
**ANNUAL
REPORT**

2018





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Pet Food Industry

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Serving pets
and their owners.

A message from the outgoing FEDIAF President



It is my pleasure to have been the President of an industry federation, which serves so many pets and their owners for the past two years. With roughly a quarter of all European households owning a dog or a cat, we produce and sell pet food to more than 80 million households in Europe. We provide healthy food for over 300 million pet animals – cats, dogs, small mammals, reptiles, fish and ornamental birds – throughout Europe.

Pet ownership is increasingly recognised for its positive impact on society. This includes companionship and improving physical and mental health benefits for pet owners as well as connecting people in neighbourhoods to name just a few.

In return, FEDIAF has a clear mission to ensure that pets receive nutritious, palatable and safe products, which are labelled in a clear way to ensure an informed consumer choice. Since June 2017, we have a lot of good news to share in this annual report. Our work in the past year concentrated, in close cooperation with the EU institutions and Member States, on having continuously improved legislation on two main issues: Pet food safety and labelling.

In this report – for the first time accessible to the public by posting it on the FEDIAF website – we outline the work and achievements of the past year: We updated and improved our self-regulations (Pet Food Safety Guide, Nutritional Guidelines for Dogs and Cats, Pet Food Labelling Code), but we also continued focusing our attention on the safety of raw materials and supported the EU additives re-authorization based on strict safety and efficacy criteria. Many dossiers on dietary rules for particular nutritional purposes were completed and submitted to the European Commission. Finally, FEDIAF achieved some very significant milestones in the EU sustainability agenda.

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

As President, I am very pleased to have worked with the Secretary General to achieve a major reform of FEDIAF's governance by adopting new by-laws, which reduced the fees for our smaller associations and opened FEDIAF membership to companies, in addition to associations. With increasing initiatives from Member States, it is essential that FEDIAF can demonstrate member benefits and achievements, not only in Brussels but also in the national capitals across Europe.

FEDIAF can be proud of the excellent work of the small team in Brussels with Thomas Meyer as Secretary General and Julien Taieb as the Deputy Secretary General. Together with the Secretary Generals of all the national associations and the invaluable work from all the company experts, we can achieve much good work. FEDIAF technical and legislative dossiers are excellently overseen by the co-chairs of our Review Committee, Clotilde Marchand and Mechthild Exner-Herforth. Their long term scientific and regulatory experience ensured focused and efficient decision making involving all members. As President, I am also very pleased that FEDIAF has become more focussed on explaining their work. This report is a clear indication of our strategy to be more accessible and open about the great work led by Therese Burke and the Communication Working Group to ensure FEDIAF's stakeholders and the public remain confident about all aspects of pet nutrition, labelling and safety in Europe.

This year has been a special year with Thomas Meyer celebrating his 20th work anniversary at FEDIAF and we are all very appreciative for the great work he has facilitated over this long period of time.

With this AGM, my busy and fulfilling two-year Presidency comes to an end and I wish my successor all success in running the very efficient European Pet Food Industry Federation.

Marinus Pannevis

A handwritten signature in black ink that reads "Marinus Pannevis". The signature is written in a cursive style with a prominent flourish at the end.

Welcome from the FEDIAF Secretary General



In February this year I celebrated my 20th work anniversary at FEDIAF! The diverse challenges and opportunities around pet food legislation, our industry's good reputation and the work in a multi-cultural environment, both from the FEDIAF membership and with EU civil servants / Members of the European Parliament (MEPs), continue to be stimulating and rewarding.

It is gratifying and significant to be part of an industry, which leads to longer, healthier and happier lives of pets with their owners. The important human-animal bond, to which we subscribe and contribute, forms an integral part of an engaging work atmosphere.

In Europe, over 300 million pet animals consume safe pet food every day, equating to billions of different pet food products each year. We have an excellent track record for safety, which FEDIAF and its membership can be proud of. I certainly am.

We are currently improving our communications activities, as we are aware that industry's continuous supply of safe, nutritious and palatable products might not be fully recognised or understood.

For the past year, and indeed for the past 20 years, my interactions with EU officials and MEPs have always been based on mutual trust. Although FEDIAF views are occasionally questioned by officials, balanced, proportionate solutions, based on facts, science and consumer needs, are found for the vast majority of issues.

I would therefore like to thank firstly EU officials at all levels for their support and understanding of pet food's specificities: Pet food is neither feed nor food, often requiring tailor-made solutions, if justified and appropriately explained.

Since EU officials rightly request solid – often scientific or economic – evidence, I would secondly like to thank pet food companies for providing significant resources and expertise via the different working groups and via the extremely important national associations, the latter mirroring our work at national authorities. Only with these resources and expertise can we develop the support arguments required by officials. The FEDIAF meetings and audio-conferences per year go into the dozens, and these provide inspiring exchanges – professionally, intellectually and also personally.

Thirdly, huge thanks go to my colleague and friend, Julien Taïeb: his performance was again remarkable over the past year. His diligence, reliability, professionalism, his negotiation and facilitating abilities and his most agreeable character make our teamwork efficient, perfect and truly enjoyable.

Despite the Single Market, industry still experiences occasional and different enforcement of EU legislation by Member States. Unfortunately, some operators being non-compliant are not sanctioned.

This means non-harmonisation, costly trade disruptions and a lack of a level playing field in our highly competitive industry. FEDIAF would like this to be addressed by more coordination between the EU and Member States, and by applying EU endorsed industry co-regulation in a uniform manner.

Up to now I have worked with 11 FEDIAF Presidents – they have two-year mandates. Each one was different, each had different priorities and I learned a lot from everyone. I thank Marinus Pannevis for his very active involvement, his high professionalism and his strong leadership by linking up closely with our Review Committee and steering the Executive Committee. We were a very efficient duo and achieved a lot over the past two years!

I look forward to my next years at FEDIAF working for the membership and serving pets and their owners.

Thomas Meyer

A handwritten signature in black ink, appearing to read 'Thomas Meyer', written in a cursive style.

The Pet Food Industry in 2017 – key milestones

1

FEDIAF revised its
**Guide to Good Practice for the
Manufacture of Safe Pet Foods;**
it was endorsed after constructive comments
by DG SANTE and Member States.

2

For four years, DG Environment
has been working on
**“Product Environment
Footprint” (PEF)**
and FEDIAF has been recognised as a
responsible and sustainable sector using
surplus products from the human food chain.

3

In cooperation with DG SANTE and Member
States, FEDIAF achieved that
**tolerances and the labelling
of certain additives**
(vitamins, flavourings,
trace elements...) were simplified.

4

Following FEDIAF input, the European
Commission, DG TAXUD reintroduced a
**zero import duty
for cat and dog food**
containing between 0.5 and 10% starch.





5

The European Standard on the **calculation of the energy in cat and dog food** was published in July 2017 enabling companies to reduce spending on costly feeding trials.

6

FEDIAF successfully established **safe upper limits** for a number of essential pet food additives. Significantly, the EU accepted that the industry can now use tuna by-products with the same – safe and low – maximum level of mercury as for human food.

7

Three years ago, the EU tasked FEDIAF with updating its **scientific dossiers of 17 so-called “PARNUTs”** – pet food with particular nutritional purposes. In 2017, FEDIAF submitted the last scientific dossiers to the EU.

8

FEDIAF has made great progress in updating the **Reference Document on Best Available Techniques** in the Food Drink and Milk Industries (FDM BREF - 2006) to outline workable emission levels, which has been well received by the decision makers.

9

2017 was the first full year of the **Communication Working Group**, which was re-started in 2016 and foundations have already been established including new toolkits, a style guide and updated fact sheets.

FACTS & FIGURES 2017

European overview



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

80 million households

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

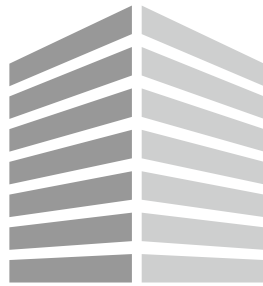
EU:
Cats 26%
Dogs 18%

Europe:
Cats 24%
Dogs 21%

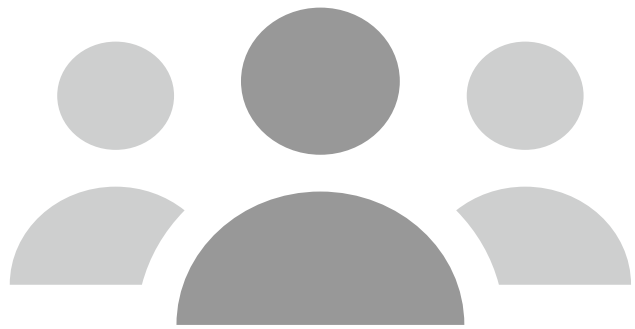


132 pet food companies

200 plants (est.)

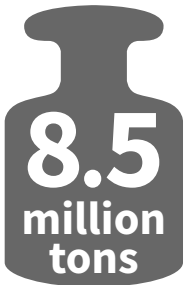


Employment



Est. direct employment:
100.000

Est. indirect employment:
900.000



Annual sales of pet food products:

Turnover: € 20.5 billion

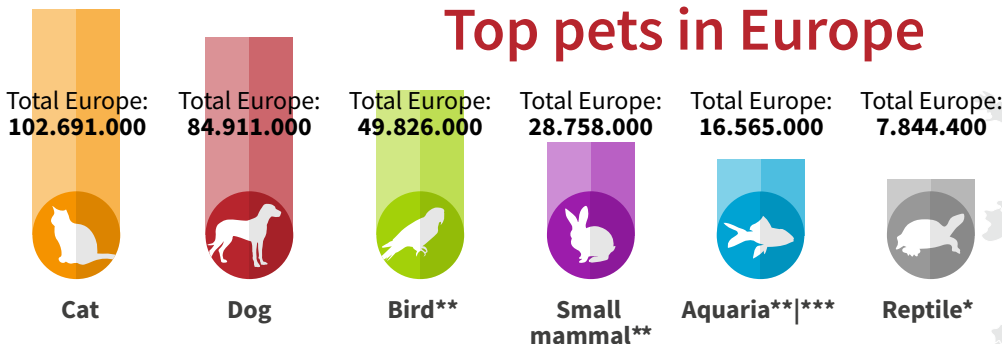


Annual value of pet related products and services:

€ 7 billion accessories
€ 9 billion services
Total: € 16 billion



Top pets in Europe



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

2%

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

FACTS & FIGURES 2017

Top pets in Europe

Cat



Total European Union: **74.407.000**

Total Europe: **102.691.000**

Dog



Total European Union: **66.375.000**

Total Europe: **84.911.000**

Bird



Total European Union: **35.425.000****

Total Europe: **49.826.000****

Small mammal



Total European Union: **21.719.000****

Total Europe: **28.758.000****

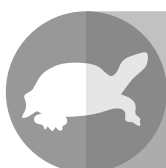
Aquarium This corresponds to an estimated 300 million ornamental fish



Total European Union: **9.385.000****

Total Europe: **16.565.000****

Reptile



Total European Union: **6.429.400***

Total Europe: **7.844.400***

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 | ** excl. Baltic States and Nordic Countries



Context

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

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

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

Objectives

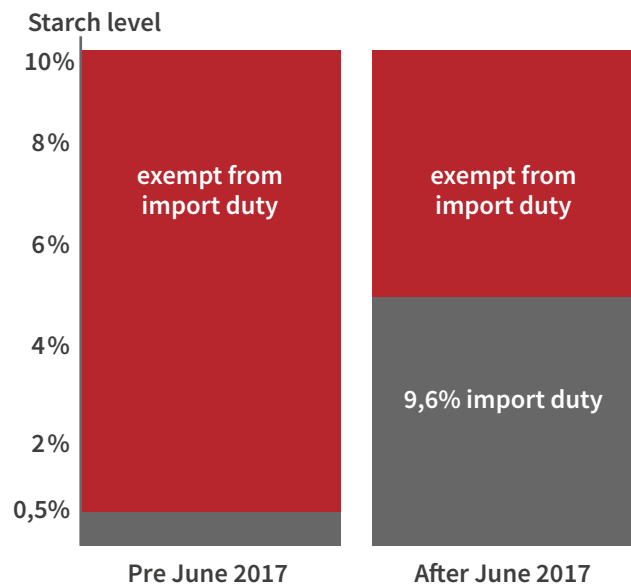
Maximise opportunities for FEDIAF members to market their products:

- 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 – Import Duty

In June 2017, FEDIAF worked with the European Commission, Directorate General Taxation and Customs Union (DG TAXUD) to address new threshold levels set for import duty paid according to starch levels in dog and cat food.

Threshold levels set for import duty



Some Member States struggled to accurately measure the level of 0.5% starch due to limitations in measurement equipment. FEDIAF worked closely with trade associations, company members and experts to reverse this amendment to pre-June limits. DG TAXUD understood the unintended result and reintroduced the 0.5% threshold, thus leading to zero import duty.

As a result, import duties claimed by customs authorities are being reimbursed.

Achievements – Cooperating with legislators

The group has worked on the amendments of the

- **EU Animal By-Products Regulation:** Adaptation of the microbiological limits for raw pet food in line with human food standards; alignment of import health certificates with international transmissible spongiform encephalopathy (TSE) rules
- **Russia:** Minimised import restriction following Avian Influenza outbreak in a number of Member States
- **Turkey:** Import health certificate mirroring EU conditions



Context

Through its initiative, “Building the Single Market for Green Products”, the European Commission aims to harmonise the communication of environmental performances of products and organisations for producers and consumers alike.

In 2014, the European Commission launched a three-year pilot testing period for both the non-food and food sectors through a multi-stakeholder process to develop product-specific rules, Product Environmental Footprint Category Rules (PEFCRs), and organisation-specific rules, Organisation Environmental Footprint Sector Rules (OEFSRs), as well as to test communication principles for a few specific sectors and products.

In May 2014, the European Commission approved the pilot project to develop **PEFCRs for prepared pet food for cats and dogs**. FEDIAF was at the time selected to cooperate as one of the pilot studies.

Objectives

FEDIAF’s goal was to define a simple methodology, credible and accessible to all its members at European level, to assess the environmental impacts of their pet food products. In particular, the allocation methodology between **meat** and **animal by-products** needed to be specified.

Assumptions regarding allocation methodology of environmental impacts to pet food:

- Pet food industry grants an added value to by-products. It gives an outlet to materials that would otherwise be discarded
- Pet food capitalises on such existing resources, which are not used or little-used for human consumption. Pet food adds value to these resources and therefore does not negatively influence the offer of commodities on the food market
- Pet food industry is responsible and recognises that it must bear the fair environmental footprint of raw materials it transforms

According to these principles and as per ISO 14.044 standard, the pet food industry believes that environmental impacts should be allocated between co-products (meat and by-products) in proportion to their economic value.

Achievements

FEDIAF’s position was formally endorsed by the Cattle Model Working Group in 2015 and the Technical Advisory Board (TAB) of the PEF pilot in 2016.

In **March 2017**, the PEF Steering Committee (SC) endorsed the TAB recommendation on economic allocation of environmental impacts between meat and by-products at slaughterhouse. This was fully endorsed by the EU and Member States in **April 2018**.

In discussions, it was recognised that our industry is a responsible, sustainable sector using surplus products from the human food chain; cattle is raised for human meat/milk consumption, there is not a single cow raised and slaughtered for pet food production. This economic criterion was thus included in the equation of the Environment Footprint and the impact of pet food will be calculated and be lower than for human food.

Then, **in the second half of 2017**, due to the evolution of the PEF methodology, and the acquisition by the European Commission of new datasets to be used by default, a remodelling exercise was carried out (by a consortium of consultants, hired by DG ENVI). The aim of this exercise was to recalculate the environmental impacts of the representative’s products already defined by the various sectors participating in the PEF pilot.

Context

Pet food plants with a finished product production capacity of at least 75 tons/day and using more than 10% feed materials of animal origin have their environmental permit delivered upon compliance with the Reference Document on Best Available Techniques in the Food Drink and Milk Industries (FDM BREF - 2006).

The BREF Task Force focuses on the Best Available Technique Reference Documents (BREF) and Best Available Technique Associated Emission levels (BAT AEL) for the Pet Food Industry.

BREF reference documents for the Food, Drink and Milk Industry are published by the European Integrated Pollution Prevention Bureau (EIPPCB). For further and detailed information see: <http://eippcb.jrc.ec.europa.eu/reference/>

In the first BREF document, published in 2006, the pet food production had been poorly described and references were incorrect.

Subsequently, FEDIAF's BREF Task Force has been working closely with the EIPPCB, Industry, members and other organisations to make improvements.

Objectives

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

Achievements

Working tirelessly on behalf of the pet food industry

The FEDIAF Task Force has witnessed many meetings and updates over the years and key dates include:

2013	Formation of the European Working Group
2014	Kick-off event looking at scope, data collection etc.
2015	Development of questionnaires for data collection (lengthier and more complex than anticipated)
2016	Webinar for data compilation, evaluation and revision of the BREF
Jan. 2017	Publication of the first draft (approx. 1000 pages)
April 2017	Comments and feedback received
Sept. 2017	Working meeting of the German UBA (environmental protection agency) as preparation for Seville meeting
Oct. 2017	Additional data evaluation workshop (Seville)
2018	Final Draft anticipated in first half of year

Achievements

The first ever 'Data Assessment Workshop'

FEDIAF Task Force and encouragement from other Technical Working Groups (TWGs) managed to persuade EIPPCB to hold an event. A Data Assessment Workshop was organised in October 2017. At the meeting, criticism about the quality of the first draft of the FDM-BREF was ruled out and data was thoroughly evaluated. In particular, it was agreed that interpretation of sensible data were incorrect and conclusions flawed.

Highlighted feedback included:

- Concerns on BATs and derived value ranges
- Requirement from Member States and industry associations to better explain the workings and, if necessary, to present their own evaluations
- Lengthy debate about data revisions required has hopefully resulted in relevant BREF improvements

The review of the FDM BREF

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

European IPPC Bureau

Industry

Environmental
NGOs

Data + information
09/2015

TWG
kick-off meeting
10/2014

Draft 1 (D1)
01/2017

Workshop FDM data
10/2017

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

Final draft
Last Quarter 2018

EU Member States
+ EFTA and Accession Countries

**European Commission/
EIPPCB**

TWG Comments

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

TWG Comments



BAT
conclusions



Highlights from FEDIAF Groups

d. Nutrition and Analytical Science

Context

Balanced nutrition ensuring adequate intakes of energy, protein, fat, minerals and vitamins is essential for cats and dogs to ensure health and longevity. Scientific knowledge about nutrient requirements, digestion of feed and metabolism of nutrients is crucial for formulating appropriate diets for cats and dogs. The FEDIAF Nutrition Working Group and the Scientific Advisory Board are working on the adaptation of these recommendations in a continuous process.

Objectives

FEDIAF's Nutrition Working Group sets out its goals:

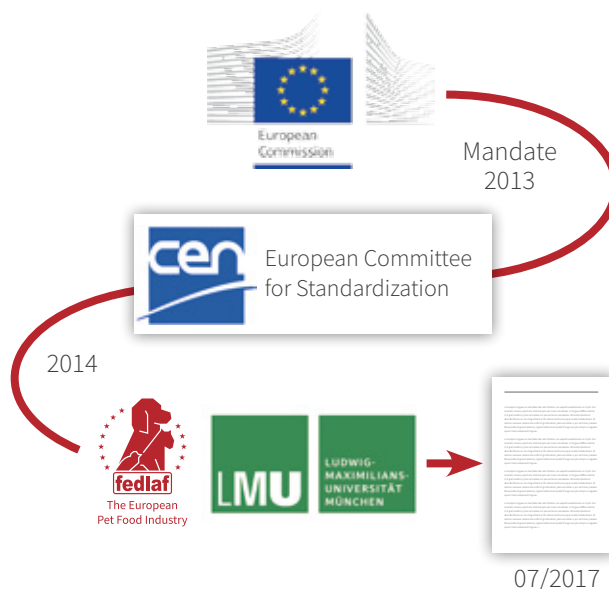
- Reflect the exchange of scientific knowledge on pet nutrition
- Set the nutritional requirements for the pet food industry
- Ensure a level playing field and consistency across the industry
- Ensure that pet food on the market is benchmarked against science
- Drive the adoption of the FEDIAF Nutritional Guidelines as European standard on dog and cat nutrition for the industry, authorities, nutritional scientists, consumer organisations and pet professionals

Achievements

The European standard on the calculation of energy in cat and dog food was published in July. This was a 3 year project initiated by the European Committee for Standardisation (CEN), managed by FEDIAF Nutrition Working Group, in collaboration with the Scientific Advisory Board (SAB) member Dr. Dobenecker (Munich University).

This European standard confirms the equations to be used by cat and dog food manufacturers and control authorities for the calculation and declaration of energy on pack. It has to be adopted by all EU Member States and several other European countries to overcome the difficulties of costly feeding trials.

European Standard on calculation of energy



Achievements in 2017

FEDIAF developed a Senior Dog Nutrition paper with its Scientific Advisory Board (SAB). The proportion of senior dogs in the total population is increasing and there is a need to communicate their specific dietary requirements. This SAB statement aims to support and inform industry and the public.

FEDIAF launched its paper entitled 'Guidance for Good Laboratory Practice in Pet Food Testing'.

Third party analysis of pet food products throughout Europe is beneficial to consumers and the pet food industry in general. This continuous monitoring of the safety and quality of our products is very useful to get a comprehensive overview of the finished pet food placed on the EU market.

e. PARNUTs Task Force

Context

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

Three years ago, the EU discussed abolishing legislation for special diets formulated, unless FEDIAF updated the partially too vague essential nutritional characteristics..

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

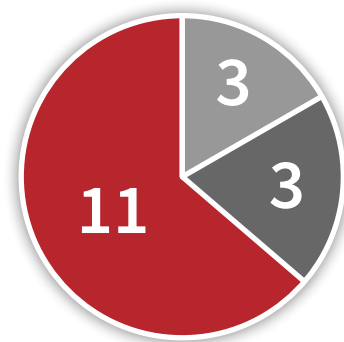
This scientific update of 17 so-called “PARNUTs” – particular nutritional purposes – took a labourious five years!

Objectives

- Gather input and advice on dietetic nutrition for cats and dogs from industry experts
- Provide DG SANTE with scientific dossiers so that the essential nutritional characteristics of the historical 17 PARNUTs can be updated

Achievements

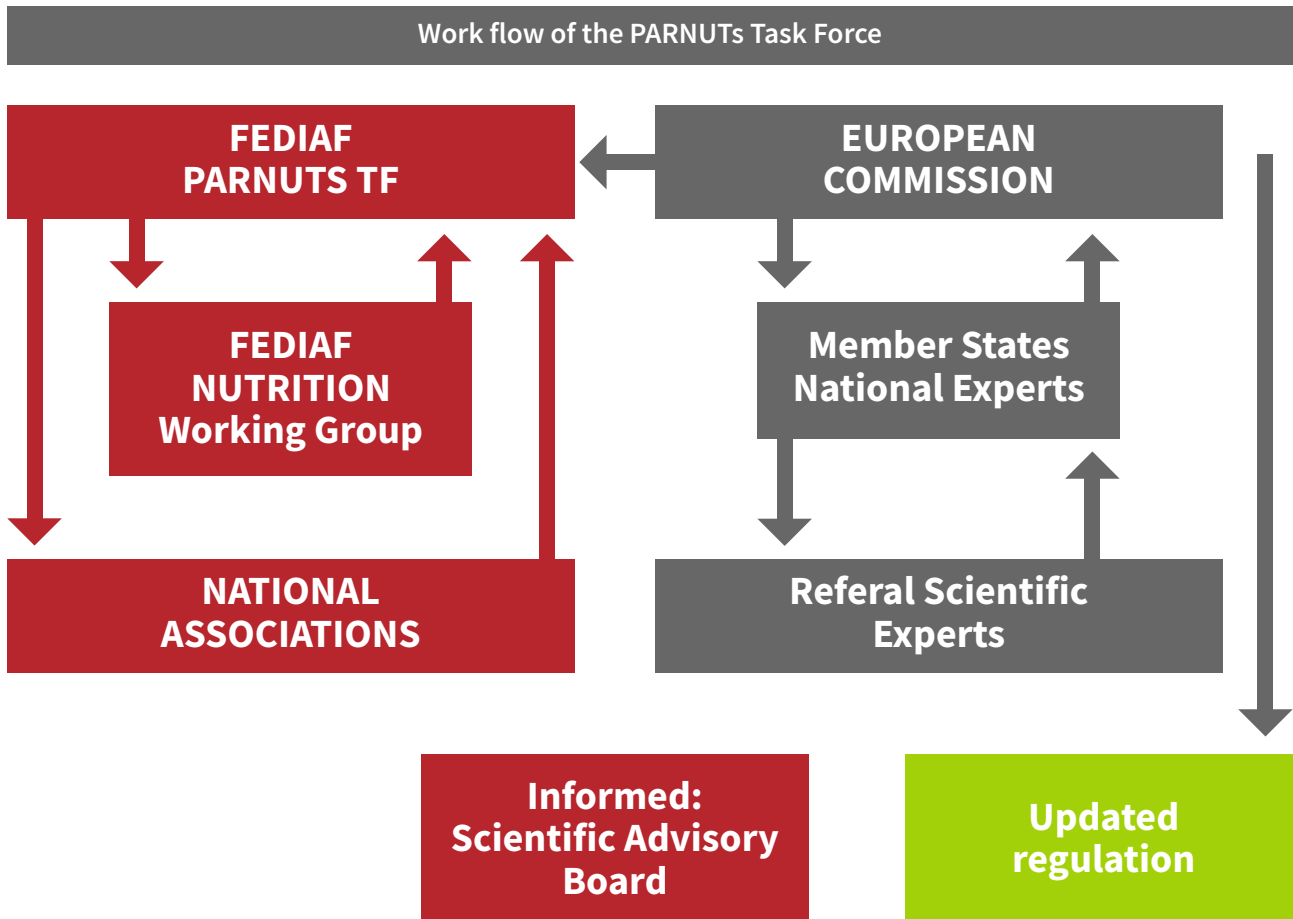
- Three amendments published in 2014 and 100% of dossiers submitted as of end 2017
- 2017 was a milestone in the task force work as the last dossiers of the initial set covering the 17 PARNUTs were finally submitted



- published
- pending evaluation (EC)
- pending adoption

In 2018, our key focus is to close the loop of an intense five years long work to complete the task we were mandated for by the Industry and DG SANTE.

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





Context

The Product Communication Working Group is comprised of industry experts in the field of labelling legislation, a complex area that needs close scrutiny.

The existing regulation for feed labelling covers mandatory requirements; in particular, the labelling of additives and of analytical constituents for pet food, which may seem to be a minor subject. However, the devil lies in the detail and the correct labelling of additives, their specific amounts and the permitted tolerances has caused issues with the control authorities who rightly insist that the legally required information is conveyed to the pet owner.

For FEDIAF members however, the unique selling point of their products is largely communicated via the non-mandatory labelling elements and as such, the legislation provides for the establishment of a Code of Good Practice in this area.

In this context, it is essential that FEDIAF can assess the impact, and influence the development of emerging regulations on direct product labelling and other associated areas. In addition, the development of a FEDIAF Code of Good Labelling Practice by and for the industry establishes a level playing-field by providing clarity on regulatory interpretation; guidance in less-regulated areas; and increased understanding for consumers.

Objectives

FEDIAF aims to maximise opportunities for members to market their products in a fair and transparent manner by:

- Considering the impact of both guidelines and regulations on all members, small and large
- Developing and maintaining a Labelling Code agreed by our members; endorsed by the SCoPAFF; and adopted by national enforcement agencies
- Ensuring that the Code of Good Labelling practice “shall aim to improve the appropriateness of the labelling...in particular...provisions on the presentation of labelling particulars...on the voluntary labelling...and on the use of claims.” [Article 25, R. 767/2009]
- Anticipating and/or responding to regulatory and/or enforcement developments, including the provision of briefing documents and position statements for use by members

Achievements – Fair Legislation

The group has worked upon the revision of two Annexes to R. 767/2009 relevant to the pet food industry, namely:

1. Annex IV that lays down technical tolerances on the declaration of Analytical Constituents.

This involved:

- Consultation of FEDIAF members for any issues with existing tolerances or requests for changes
- Submission of FEDIAF proposals for the amendment of tolerances based on members feedback
- Impact assessment of proposals from European Commission

2. Annex VII that details when and how we must declare additives, which included informing the European Commission and national experts to:

- Change the manner of declaration for trace elements and of additives the amount of which decline during processing and shelf life, such as vitamins
- Include flavourings as an additive group that can be labelled by name only
- Have official abbreviations for very wordy legal group names e.g. vitamins and vitamin like substances.

FEDIAF’s Product Communication Group has also been working developing the Code of Good Labelling Practice, with key activities including:

- Responding to national experts’ comments on revised Code – three times
- Reviewing how the Code might be incorporated into law, entailing:
 - Identification of key elements of the Code
 - Converting these into regulatory language
 - Risk assessment of requesting additional legal provisions
 - Impact assessment including unintended consequences
 - Final recommendations
- Preparation of a position paper on pre-market authorisation of claims
- Input into GS1 project to build a platform for the delivery of legally required information to retailers in a consistent and legal format

As always, any member with an interest in these areas or the broader topic of labelling is very welcome to join us.



Context

Safety of pet food is of paramount importance to FEDIAF. Pets are increasingly considered to be “members of the family” and food borne accidents must be avoided by ensuring professional safety systems are in place – from raw materials supply, factory design, personnel, processes or safe packaging. It is important for the Industry to have a Guide to Good Practice.

Since its initial launch in 2001, the Working Group has continued to develop FEDIAF’s ‘Guide to Good Practice for the Manufacturing of Safe Pet Foods’. It was endorsed by the European Commission in 2007 and, after revision, in 2010, the Guide’s references were published in the Official Journal of the EU. In 2014, the European Commission advised that the Guide should cover pathogen monitoring and mycotoxins. Furthermore, we had a request for more content on traceability and to look at Hazard Analysis and Critical Control Points (HACCP) in more depth.

The working group agreed that individual companies should analyse their own hazards and set up a monitoring plan based on their risk analyses. The Working Group continued to work on an updated version of the Guide.

Achievements

Development of the ‘Guide to Good Practice for the Manufacturing of Safe Pet Foods’

In 2017, there were several meetings to discuss the work and to finalise the draft for approval by the Review Committee. The comprehensive new version of the guide was adopted at the FEDIAF AGM in Manchester. The industry’s excellent safety record is proof that the document is a first-rate reference guide.

The key changes made to the Guide were:

- Structure of the guide
- Footnotes with reference to the legislation
- Coloured reference to the definitions
- Illustrations
- Six chapters

The Guide was submitted to the European Commission Directorate General for Health and Food Safety (DG SANTE) and Member States who endorsed it in February 2018.

Achievements

GAPFA’s Safety Guide:

FEDIAF’s Feed Safety & Hygiene Working Group is leading the Feed Safety Work Stream in GAPFA and holds bimonthly teleconferences to align work. FEDIAF has given significant input into GAPFA’s Pet Food Safety Guide, which was adopted at the GAPFA AGM in November in Toronto and can be viewed on their website.

In 2017, the GAPFA Safety Work Stream worked closely with the Trade Facilitating Work Stream and reached an important milestone by signing the Memorandum of Understanding with the World Organisation for Animal Health (OIE). This global organization, recognised for its work to prevent the spread of animal diseases, will work with GAPFA to share information and new developments.

OIE has communicated their objective to work on a global health certificate for pet food to ease international trade between the regions.



h. Additives and Undesirable Substances

Context

FEDIAF's Additives and Undesirable Substances Working Group includes European industry experts on legislation governing feed additives and undesirable substances.

Manufactured pet food offers a safe, carefully formulated and nutritionally balanced diet. Additives are essential for achieving nutritional completeness, for maintaining diets' desirable colour, flavour and texture plus to ensure their safety and stability.

European legislation sets very strict requirements for safety and efficacy of pet food ingredients.

Only additives authorised for their intended function can be used in pet food. The authorization process is very thorough and includes safety and efficacy assessment by the European Food Safety authority (EFSA). Each additive has to be reauthorised every 10 years.

Similarly, the presence of unavoidable undesirable substances is of concern and the legislation sets guidelines and/or limits for undesirable substances in feed materials and in pet foods. These levels are established with EFSA involvement and are based on the most recent scientific data available. The FEDIAF Working Group monitors and assesses the impact of emerging legislative proposals for member companies and provides feedback to the European Commission on pet-food specific levels of undesirable substances. For example, Commission recommendation No 2016/1319 of 29 July 2016 establishing maximum levels of mycotoxins in pet food, reflects FEDIAF internal recommendation that have been in place for many years.

The safety and nutritional excellence of pet food is of utmost importance for FEDIAF members. It is equally important that the EU pet food industry maintains its ability to innovate and successfully compete in the world arena whilst tackling the global challenges of sustainability and food security. It is therefore important that FEDIAF can assess the impact, in addition to actively contributing to the regulatory framework on additives and undesirable substances in Europe.

Achievements

FEDIAF's Additives and Undesirable Substances Working Group successfully agreed

- A new maximum level of mercury in tuna based feed materials, aligned with the human food maximum level, to allow our industry to use tuna by-products from the human food industry. This ended the somewhat awkward situation that pet food had stricter limits than human food
- The adoption of orphan additives regulation with realistic and enforceable transition measures, which maintain the provision of two years transition period for pet food
- Becoming a member of the PARI-EFSA industry platform, to ensure that interests of the EU pet food industry are well represented and that our voice is heard
- Ethoxyquin withdrawal: achieving realistic and enforceable transitional measures that allowed for identification, development and implementation of alternative solutions without disruption for the business

Context

Today, there is an increasing focus on pet food nutrition themes, which is aligned to trends and developments in the human food sector. Unfortunately there is also a lot of misinformation available and this can result in a decreasing consumer confidence in prepared pet food. Therefore it is more and more important to make FEDIAF and the National Associations the go-to source for factual and science-based information and to present the strong expertise in the industry.

Objectives

FEDIAF represents the European Pet food industry as a whole. It is therefore important how we present FEDIAF to members and the outside world.

The FEDIAF Communication Working Group aims to:

- Contribute to the improved image and visibility of FEDIAF
- Create a positive and professional image of our industry grounded in facts, science and expertise
- Establish the FEDIAF website as the 'go-to' source of objective, scientific and factual information for everything around pet food

A more proactive media stance

To better promote the image and reputation of FEDIAF and the work we do, we started taking a more proactive stance to media in 2017 releasing a number of media releases including:

- (AGM) 'European Pet Food industry approves new safety and nutrition standards' 30 June
- (Facts & Figures) 'Europeans continue to seek the company of cats and dogs' 30 June

Releases were published in numerous websites including those of the National Associations and other media such as: Pet Business World (online), Pet Gazette (UK), PetsInternational Magazine (NL), Petonline (Germany).

All media releases are available on www.fediaf.org

Achievements – Develop the Foundations

2017 was the first full year of the Communication Working Group, which was re-started in 2016 after several years of inactivity. Our key focus for 2017 was to establish the foundations for our work going forward.

Together, we aligned on the processes and way of working which allowed us to:

- Create an updated toolkit with branded templates
- Start to develop a new style guide
- Update several Factsheets
- Take a more proactive stance to media with press releases and reserve statements
- Complete an analysis of the content and layout of the website and start to develop new and more complete content
- Undertake a review of Responsible Pet Ownership activity (RPO)
- Input into the FEDIAF newsletter

Updated Toolkit with branded templates

In order to present a professional, modern and dynamic image representative of the industry we represent, we created templates for pull up banners, press releases, Facts and Figures and Powerpoint.

Update of several Factsheets

The update of FEDIAF's factsheets ensure that the latest science and information is readily available from our website. The look and feel of the factsheets is consistent with the rest of our material and they help present our industry as authoritative and science based.

The range includes:

- Are homemade diets a viable alternative
- Animal proteins in pet food used in the EU
- Pet food additives
- Understanding pet food labels
- Responsible raw feeding for cats and dogs
- Are vegetarian diets for cats and dogs safe?



PRESS RELEASE

Europeans continue to seek company of cats and dogs

The European Pet Food Industry Federation has presented new facts and figures for Europe: The popularity of cats, dogs, ornamental birds and small mammals remains very high.

Brussels, June 2017 – Around 80 million households in Europe owned at least one pet animal according to the latest pet related statistics which were presented at FEDIAF's annual general meeting.

Pets are very popular

"We have seen the popularity of most pets increase in European households", FEDIAF president Marinus Pannevis said. "Pets, in particular dogs and cats, are more and more an important part of Europeans' lives."

The number of dogs in the EU now stands at over 68 million; the number of cats is above 74 million. Increasingly small animals are appreciated by owners: 40 billion ornamental birds, 20 million small mammals and millions of fish in 9.6 million aquaria are cared for in the EU.

Pets provide employment

The economic importance of pet ownership is revealed by the high number of direct and indirect employment: "Our sector provides approximate 100.000 direct jobs in the industry – but indirect employment means an estimated 900.000 jobs in related sectors", Marinus Pannevis said. This estimation is based on approximately 200.000 veterinarians in Europe, an estimated 60.000 pet specialist stores, suppliers to the pet food industry, the pet accessories industry, trade shows, pet press, breeders, animal welfare organizations and transport.

€ 35.5 billion combined turnover

Pets in Europe, their food and related products and services (veterinarians, pet shops, breeders, accessories, grooming, medicines...) contribute significantly to the European economy: The pet food industry reaches € 19.5 billion turnover in 2016, the related products and services another € 16 billion.

FEDIAF represents the European pet food industry with around 200 production sites. It is an umbrella organization of national pet food industry associations. FEDIAF's mission is to be the credible and responsible voice of the European pet food industry collaborating with authorities, regulators and academics for achieving favourable conditions for the supply of safe, nutritious and palatable products to pets and their owners. Based in Brussels, FEDIAF is fully committed to promoting responsible pet ownership, to the welfare of pet animals, to their important social role and to the respect of sustainable development. www.fedialf.org

Contact: Thomas Meyer, Secretary General, + 32 (0) 238 05 20 – thomas@fedialf.org

FACTS & FIGURES 2016



Estimated number of European households owning at least one pet animal	80 million households
Estimated percentage of European households owning at least one cat or one dog	Europ. Union: Cats 26% Dogs 18% Europe: Cats 24% Dogs 21%
Number of pet food producing companies	132 pet food producing companies 200 production plants
Employment Indirect employment is an estimation based on an approximate 200.000 veterinarians in Europe, an estimated 60.000 pet specialist stores, medication/vaccination, suppliers to the pet food industry, pet accessories industry, trade shows, pet press, breeders, animal welfare organizations, transport...	Direct employment Pet food industry: 100.000 Indirect employment: 900.000
Annual sales of pet food products	Volume: 8.5 million tons Turnover: € 19.5 billion
Annual value of pet related products and services This estimated figure includes in particular breeders, dog training, pet accessories, grooming, veterinarians, insurances, medication, vaccination...	€ 7 billion accessories € 9 billion services Total: € 16 billion
Annual growth rate of the pet food industry (average value over the past 3 years)	2 %



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

FEDIAF beschließt neue Ernährungs-Leitlinien

Bei ihrem jährlichen Meeting verabschiedete die European Pet Food Industry Federation (FEDIAF) eine neue Leitlinie für den Nährstoffbedarf von Hunden und Katzen sowie einen Sicherheitsratsgeber für die Produktion

von Heimtierfutter, der die aktuellen gesetzlichen Anforderungen berücksichtigt. Nach der bis Jahresende erwarteten Zustimmung der EU kann der Ratgeber auf der FEDIAF-Webseite heruntergeladen werden. www.fedialf.org/uk

Annual general meeting of Fedialf

The European pet food industry recently held its annual general meeting in Manchester in the UK. "The Pet Food Industry United" was this year's theme for Fedialf's annual general meeting, which brought together 125 delegates from European associations and companies.

Fedialf gave an overview of the past working year's EU legislative developments underlining the need for clear, enforceable rules for a level playing field between the operators.

FACT SHEET



Are Homemade Diets a Viable Alternative to Prepared Pet Food?

For many pet owners providing home prepared meals for their pets is appealing. However, there is a growing concern that these diets may not be as safe and nutritious as commercial pet food. This fact sheet provides a comprehensive overview of the risks and benefits of homemade diets, and offers practical advice on how to ensure your pet's diet is safe and balanced.



Key findings: Homemade diets can be a viable alternative to prepared pet food, but they must be carefully formulated to ensure they are safe and nutritious. It is essential to consult with a veterinarian or a pet nutritionist before preparing a homemade diet.

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FACT SHEET



Pet Food Additives

Additives are used in pet food to provide essential nutrients, improve palatability, and enhance the overall quality of the product. This fact sheet provides a comprehensive overview of the different types of additives used in pet food, and offers practical advice on how to ensure your pet's diet is safe and nutritious.

Key findings: Pet food additives are used to improve the quality and safety of pet food. They can help to ensure that your pet's diet is balanced and nutritious.

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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 2016 - June 2018 is Mr. Marinus Pannevis (the Netherlands).

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

We are supported by the National Secretaries of National Associations (TASAG).



**Marinus Pannevis,
President FEDIAF
(2016 – 2018)**

Marinus graduated from Wageningen University in the Netherlands in 1988 in animal nutrition and started his career working for the Zoology Department of the University of Aberdeen in Scotland. From 1990 till 2017, Marinus has been working for Mars Petcare, based in the U.K. and Germany covering European and Global Research and Development leadership roles and during the last years also the Public affairs agenda for Europe. In 2013 he was elected chairman of the Dutch Pet food industry association (NVG). In 2016 he was elected also for a two year term as president of FEDIAF in which he took up the modernisation of the structure and statutes of the association. His term as FEDIAF President ends in June 2018.



**Thomas Meyer,
Secretary General, FEDIAF
(1998 – 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 1998 he has been Secretary General of FEDIAF.

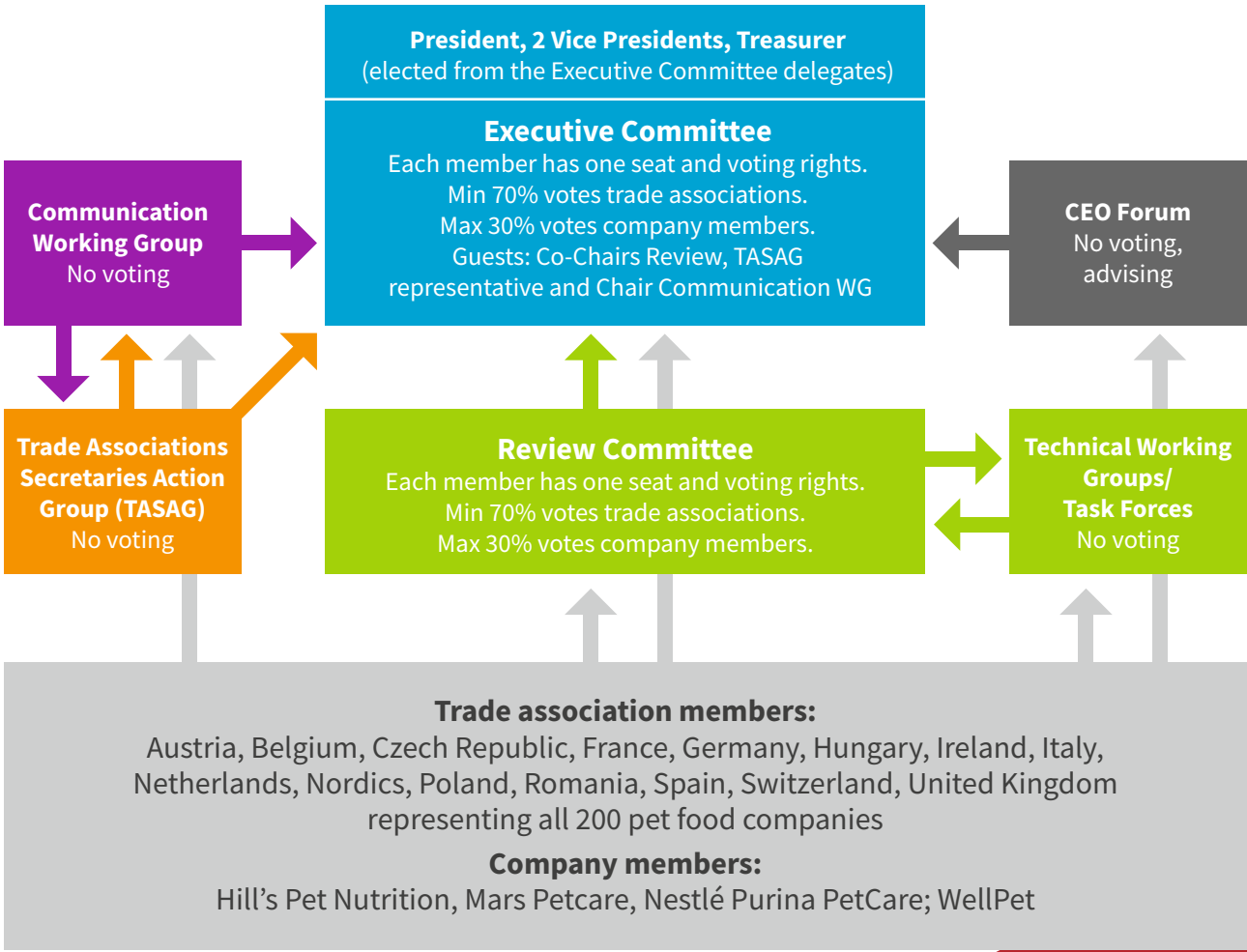


**Julien Taïeb,
Deputy Secretary General, FEDIAF
(2014 – present)**

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

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: Marinus Pannevis – NVG
Gratziela Bahaciu – ARPAC
Yves Bodet – TASAG
Jordi Bosch – ANFAAC
Therese Burke – Chair Communication Working Group
Christophe Carlier – FACCO
Irina Derksen – Hill's Pet Nutrition
Terkel Due – Nordics
Urs Eberhard – VHN
Mechthild Exner-Herforth – Mars Petcare
Hermann Habe – ÖHTV
Istvan Hell – HPFA
Kathy Heungens – BEPEFA
Robert Kaczmarek – POLKARMA
Peter Kersh – PFMA
Lina Lopez – WellPet
Clotilde Marchand – Nestlé Purina PetCare
Pietro Molteni – ASSALCO
Thomas Neumann – IVH

Review Committee

Co-Chair: Mechthild Exner-Herforth - Mars Petcare
Co-Chair: Clotilde Marchand - Nestlé Purina PetCare
Izabella Balanyiné – HPFA
Robin Balas – FACCO
Irina Derksen – Hill's Pet Nutrition, VHN
Åsa Dufva – Nordics
Robert Kaczmarek – POLKARMA
Mieke Lammens – BEPEFA
Melinda Magdus - SVPDZ
Anita Pachatz – ÖHTV
Monika Prenner – PFMA
Nicole Rabehl – IVH
Victor Romano – ANFAAC
Alberto Setti – ASSALCO
John Williams – NVG

Trade Associations Secretaries Action Group (TASAG)

Chair: Yves Bodet – FACCO
Antonella Bagini – ASSALCO
Gratziela Bahaciu – ARPAC
Benita Beekhof – NVG
Michael Bellingham – PFMA
Santiago de Andres v ANFAAC
Stefan Emmenegger – VHN
Ursula Huber – OHTV
Katrín Langner – IVH
Melinda Magdus – SVPDZ
Maciej Przewdzia – POLKARMA
Miriam Ryan – PFAI
Gyöngyi Szórádi – HPFA
Liesbeth Verheyen – BEPEFA

Communication Working Group

Chair: Therese Burke – Mars Petcare
Aurélie Bynens – FACCO
Clémentine Jean-Philippe – Nestlé Purina PetCare
Dieter Meyer – Vitakraft
Detlev Nolte – Nolte PR
Annet Palamba – Hill's Pet Nutrition
Nicole Paley – PFMA
Gyöngyi Szórádi – HPFA

Additives and Undesirable Substances working Group

Chair: Irina Derksen – Hill's Pet Nutrition
Pascale Bensman – Nestlé Purina PetCare
Helen Clegg – Mars Petcare
Liz Colebrook – Mars Petcare
Geoffrey Daniel – Royal Canin
Fanny Dumont – Royal Canin
Gert Grossheider – Gimborn
Ricardo Kaku – Nestlé Purina PetCare
Ines Münzfeld – Mars Petcare
Jerome Naar – Royal Canin
Stéphane Peeters – Spectrum Brands
Victor Romano – Affinity Petcare
Andreas Thoben – Vitakraft
Martin van Bohemen – Hill's Pet Nutrition
Paula Wartelski – Nestlé Purina PetCare

Feed Hygiene and Safety Working Group

Chair: John Williams – Nestlé Purina PetCare
Philippe Claude Bernard – Mars Petcare
Sebastien Joye – Mars Petcare
Elodie Page – Virbac
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
Gérard 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 – Nestlé Purina PetCare
Lisa Conboy – Nestlé Purina PetCare
Irina Derksen – Hill's Pet Nutrition
Pauline Devlin – Royal Canin
Christine Huggett – Spectrum Brands
Isabelle Jeusette – Affinity Petcare
Karin Kühn – Bosch Tiernahrung
Isabelle Leriche – Virbac
Francis Pastoor – Dechra
Ingrid Van Hoek – Royal Canin
Ariane Wehrmaker – Saturn PetCare

Nutrition and Analytical Science Working Group

Chair: Thomas Brenten – Royal Canin
Iveta Becvarova – Hill's Pet Nutrition
Catherine Bogaert – Neovia
Jean Christophe Bouthegourd – Nestlé Purina PetCare
Lisa Conboy – Nestlé Purina PetCare
Pauline Devlin – Royal Canin
Lisa Heesen – Bewital
Petra Hellweg – Mars Petcare
Swanneke Hendriks – Nestlé Purina PetCare
Christine Huggett – Spectrum Brands
Karin Kühn – Bosch Tiernahrung
Galyna Rybachuk – Nestlé Purina PetCare
Celina Torre – Affinity Petcare
Ingrid Van Hoek – Royal Canin
Ariane Wehrmaker – Saturn PetCare

Feed Materials and Trade Working Group

Chair: Monika Prenner – Nestlé Purina PetCare
Robin Balas – Royal Canin
Aurélié 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 – Ospelt
Stephane Peeters – Spectrum Brands
Mindaugas Rupsys – Mars Petcare
Miriam Ryan – PFAI
Alfred Schloesser – Nestlé Purina PetCare
Sarka Steflova – Hill's Pet Nutrition

Product Communication Working Group

Chair: Liz Colebrook – Mars Petcare
Michael Alvermann – Saturn PetCare
Jean-Christophe Bouthegourd – Nestlé Purina PetCare
Irina Derksen – Hill's Pet Nutrition
Delphine Moniot – Royal Canin
Ines Münzfeld – Mars Petcare
Stephane Peeters – Spectrum Brands
Monika Prenner – Nestlé Purina PetCare
Victor Romano – Affinity Petcare
Miriam Ryan – PFAI
Sonia Saez – Nestlé Purina PetCare
Willeke Stroucken – Partners in Pet Food
Andreas Thoben – Vitakraft
Klaus Tesch – Saturn PetCare
Stephanie Van Komen – Versele Laga
Luisa Vierbaum – Rondo Food

Environment and Sustainability Working Group

Chair: Pascale Bensman – Nestlé Purina PetCare
Aurélié Bynens – FACCO
Gert-Jan Krom – C&D Foods
Christian Schünemann – Consultant
Ariane Wehrmaker – Saturn PetCare

FEDIAF Members



FEDIAF Members

FEDIAF has member associations representing 18 countries. Since January 2018, and after a thorough review of our by-laws and internal regulations, FEDIAF now has also four company members (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
T: +43 1 7122121-0
F: +43.2162.601.601
info@oehtv.at

Belgium

BEPEFA
Belgian Petfood Association
Rue de l'Hôpital, 31
B. - 1000 BRUXELLES
Liesbeth@bfa.be
www.bepefa.eu

Czech Republic

SVPDZ
Sdruzeni vyrobcu potravy pro domaci zvirata
Prazska 320
CZ - 257 21 Porici nad Sazavou
sekretariat@svpdz.cz
www.svpdz.cz

Denmark

Finland

Norway

Sweden

NPFA
Nordic Pet Food Association
Dagligvareleverandørerne
Nørre Voldgade 48, 4. Sal
DK - 1358 København K
T: +45 33 13 92 92
Indsiget@dagligvareleverandorerne.dk
www.npfa.dk

France

FACCO
Chambre syndicale des fabricants
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familiers
46, Boulevard de Magenta
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F: +33.1.40.18.15.43
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Germany

IVH
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F: +49.211.59.60.45
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www.ivh-online.de

Hungary

HPFA
Hungarian Pet Food Association
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hpfa@t-online.hu
www.pfma.hu

Ireland

PFAI - The Pet Food Association of Ireland
IBEC
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IRL. - DUBLIN 2
miriam.ryan@ibec.ie
T: +353.1.605.1500
F: +353 1 605.1669

FEDIAF Members

Italy

ASSALCO
Associazione Nazionale tra le Imprese per
l'Alimentazione e la Cura degli Animali da Compagnia
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T: +39 06 69 20 08 98
F: + 39 06 69 29 54 05
assalco@assalco.it
www.assalco.it

Netherlands

NVG
Nederlandse Voedingsindustrie
Gezelschapsdieren
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NL - 4200 AR GORINCHEM
T: + 31.183.64.50.23
F: + 31.183.62.11.61
nvg@atriumgroep.nl
www.nvg-diervoeding.nl

Poland

POLKARMA
Polish Pet Food Manufacturers' Association
ul. Woronicza 31/152,
PL - 02-640 Warszawa
T: +48.22.646.88.18
sekretariat@polkarma.pl
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
RO - Bucharest
T: +40 21-314.02.00
F: +40 21-314.02.90
office@arpac.ro
www.arpac.ro

Spain

ANFAAC
Asociación nacional de fabricantes
de alimentos para animales de compañía
c/ San Agustín, 15-1º derecha
E. - 28014 MADRID
T: +34.91.369.21.34
F: +34.91.369.39.67
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www.anfaac.com

Switzerland

VHN
Verband für Heimtiernahrung
Thunstrasse, 82
CH - 3000 BERN 6
T: +41.31.356.21.21
F: +41.31.351.00.65
info@vhn.ch
www.vhn.ch

United Kingdom

PFMA
The Pet Food Manufacturers' Association
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T: +44.207.379.9009
F: + 44.207.836.7409
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www.pfma.org.uk

Nestlé Purina PetCare

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

Hill's Pet Nutrition

Grabetsmattweg
4106 Therwil
Switzerland
www.hillspet.com

Mars Petcare

Eitzer Str. 215
27283 Verden
Germany
www.mars.com/global/about-us/locations#?conti-
nent=Europe

WellPet

WellPet Belgium BVBA
Leonardo da Vincilaan 19
MC Square
1831 Machelen, Diegem
Belgium,
www.wellpet.com/index.aspx

Glossary

BAT EL	Best Available Techniques Emission Level
BREF	Best Available Techniques in the Food and Drink Industries
CEN	European Committee for Standardisation
COCERAL	European Association representing trade in cereals, rice, feedstuffs, oil seeds, olive oil, oils and fats, and agrosupply
DG ENVI	European Commission Directorate General for Environment
DG SANTE	European Commission Directorate General for Health and Food Safety
DG TAXUD	European Commission Directorate General for Taxation and Customs Union
EFSA	European Food Safety Authority
EIPPCB	European Integrated Pollution Prevention and Control Bureau
FEDIAF	European Pet Food Industry Federation
GAPFA	Global Alliance of Pet Food Associations
HACCP	Hazard Analysis and Critical Control Points
IED	European Industrial Emissions Directive
ISO	International Organization for Standardization
OEFSRs	Organisation Environmental Footprint Sector Rules
OIE	World Organisation for Animal Health
PARI-EFSA	Co-operation platform of European industry sectors impacted by EFSA's work
PARNUTs	Pet Foods with PARTICULAR NUTritional Purposes
PEF	Product Environment Footprint
PEFCRs	Product Environmental Footprint Category Rules
SAB	Scientific Advisory Board
SC	Steering Committee
SCoPAFF	Standing Committee on Plants, Animals, Food and Feed
TAB	Technical Advisory Board
TASAG	FEDIAF Trade Associations Secretaries Action Group
TWGs	Technical Working Groups
UNISTOCK	European Association of Professional Portside Storekeepers for Agibulk Commodities



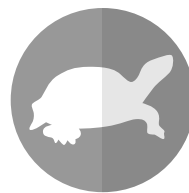
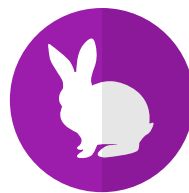
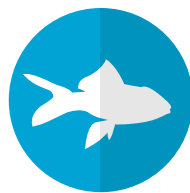
The European
Pet Food Industry

European Facts & Figures 2017

FACTS & FIGURES 2017

European Overview

Estimated number of European Union households owning at least one pet animal	80 million households
Estimated percentage of European households owning at least one cat or one dog	EU: Cats 26% Dogs 18% Europe: Cats 24% Dogs 21%
Number of pet food producing companies	132 pet food producing companies 200 production plants (est.)
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: € 20.5 billion
Annual value of pet related products and services	€ 7 billion accessories € 9 billion services Total: € 16 billion
Annual growth rate of the pet food industry (average value over the past 3 years)	2 %



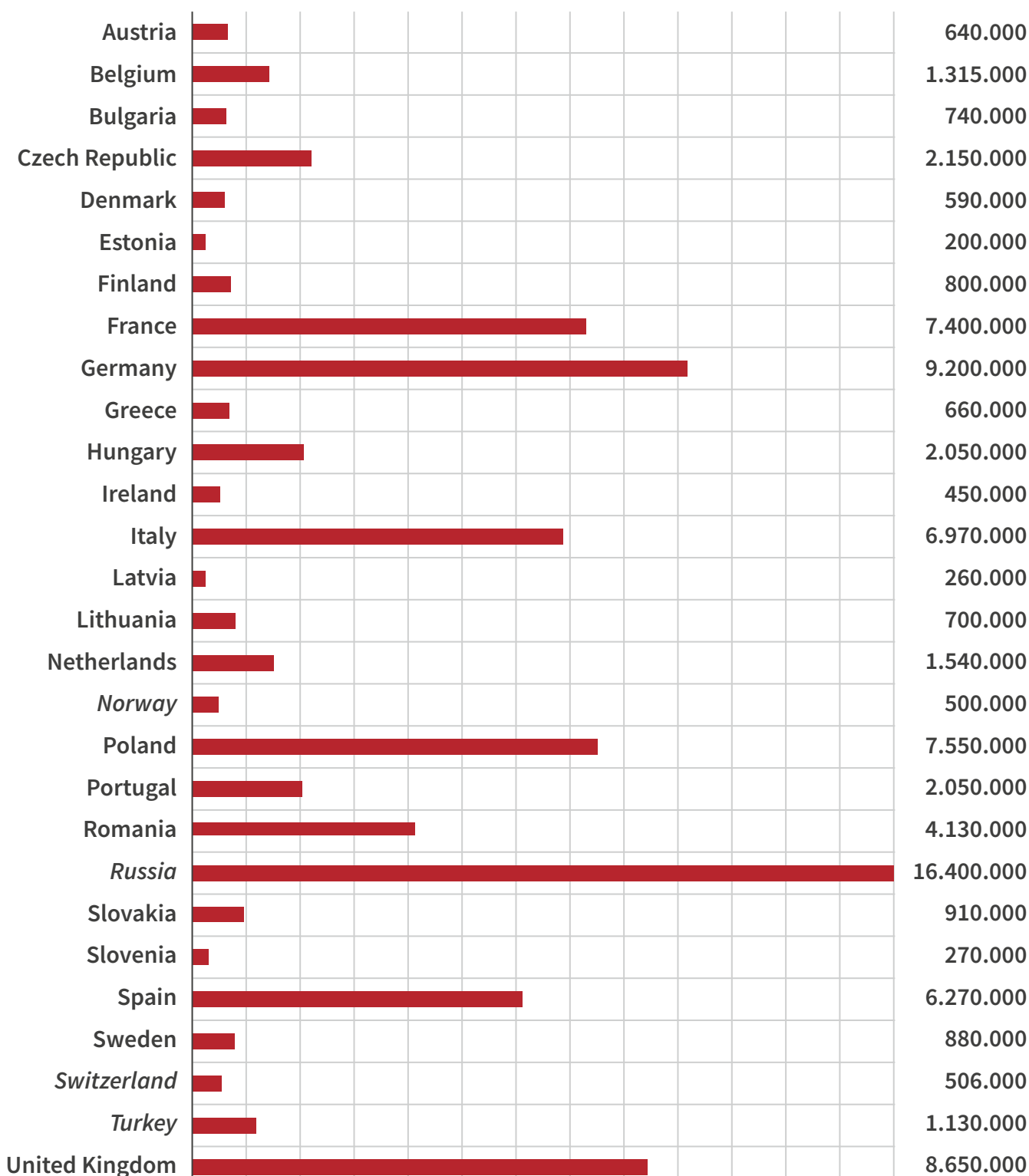
FACTS & FIGURES 2017

European dog population



Total European Union: 66.375.000

Total Europe: 84.911.000



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

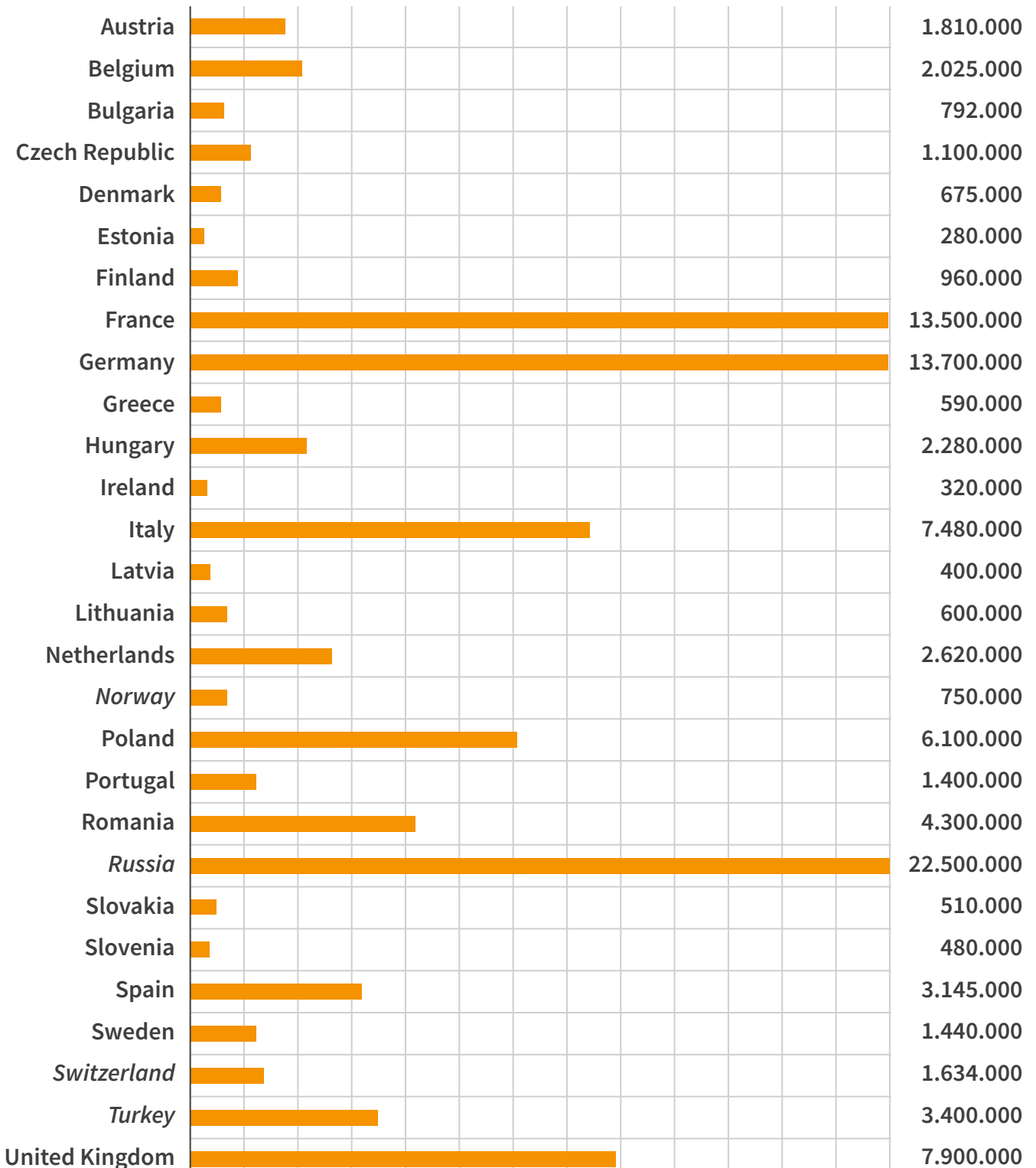
FACTS & FIGURES 2017

European cat population



Total European Union: 74.407.000

Total Europe: 102.691.000



Non EU Member States indicated with italics

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FACTS & FIGURES 2017

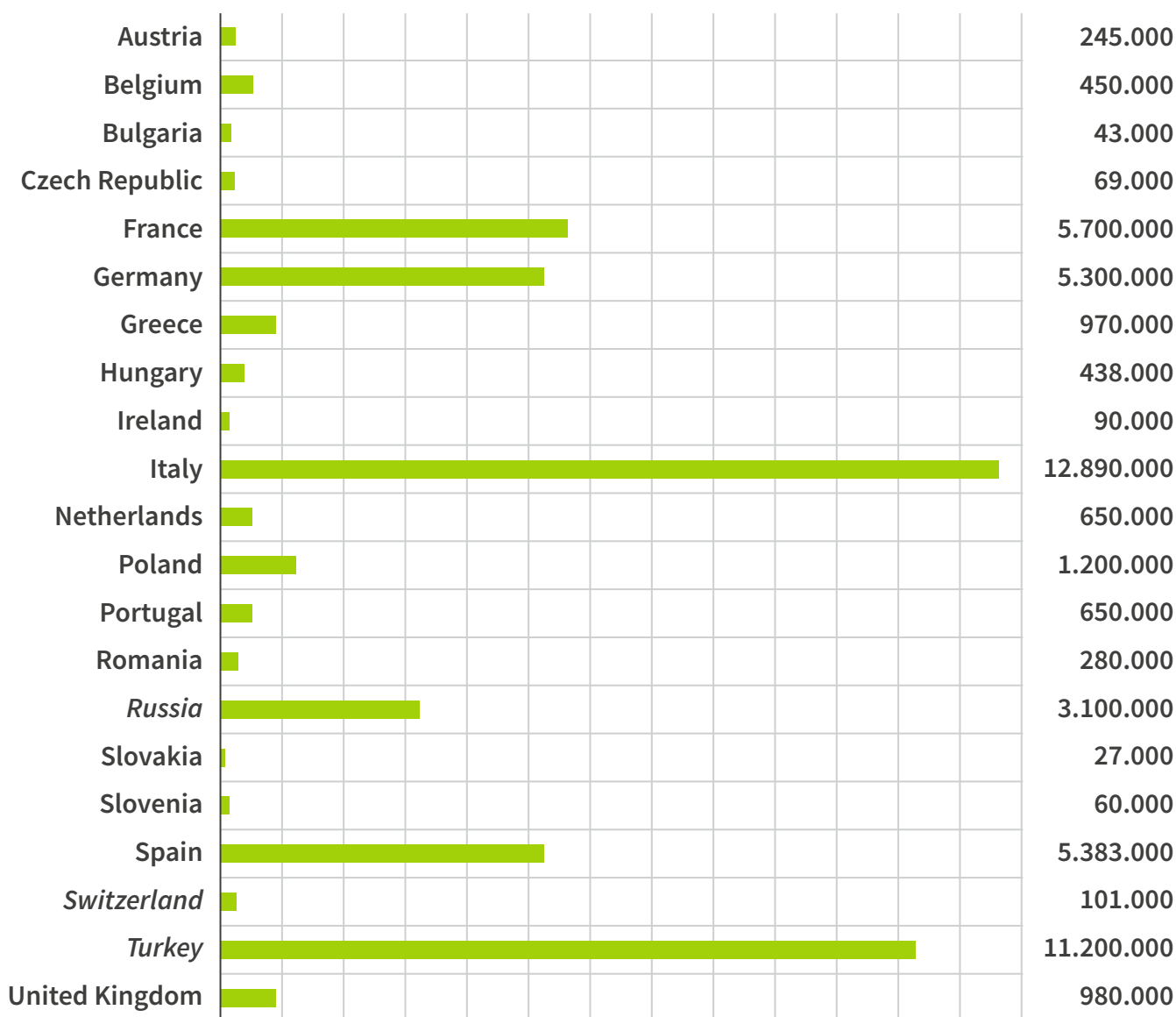
European ornamental bird population



Total European Union: 35.425.000

Total Europe: 49.826.000

(excl. Baltic States and Nordic Countries)



Non EU Member States indicated with italics

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

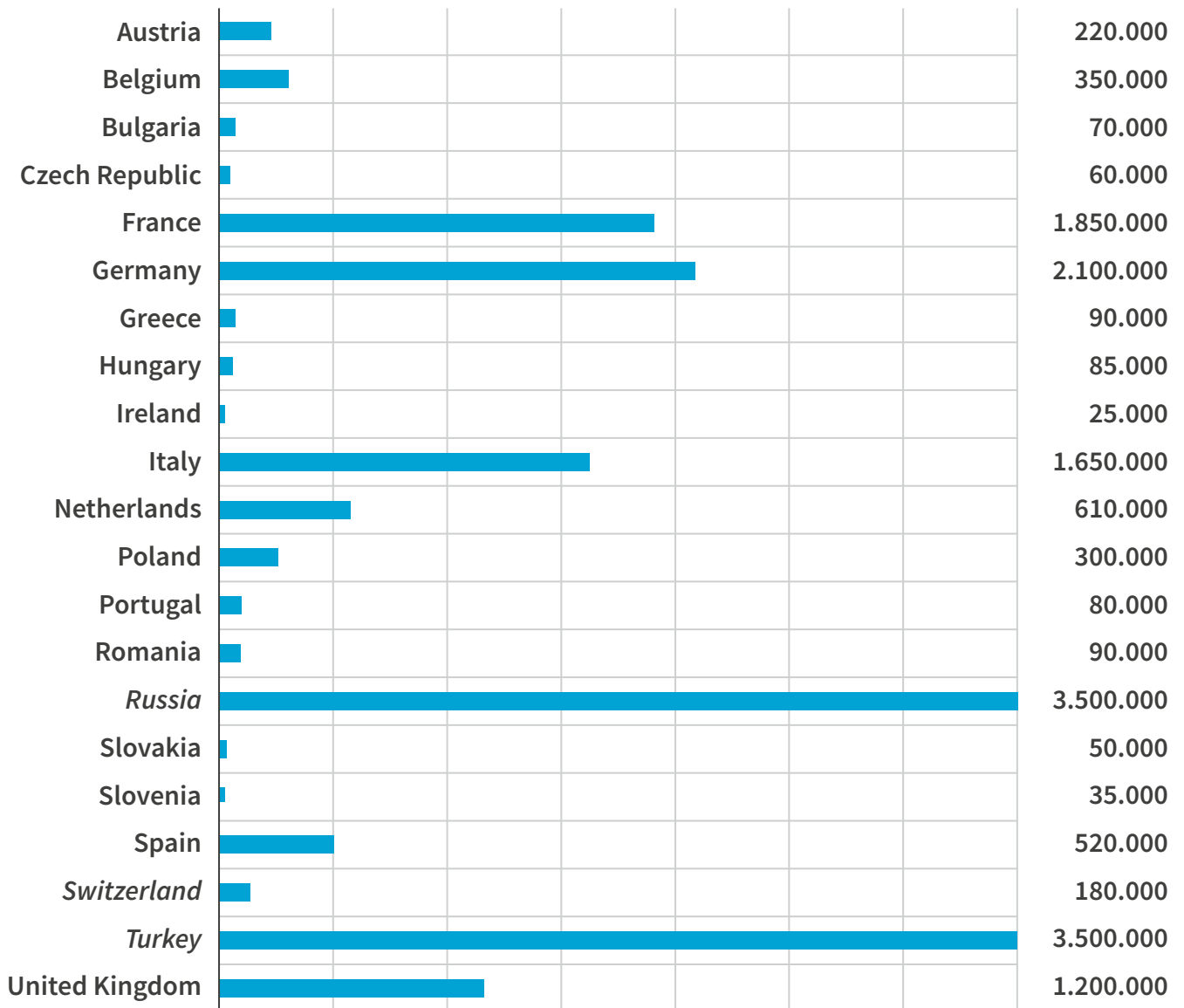
FACTS & FIGURES 2017

Estimated number of European aquaria



Total European Union: 9.385.000
Total Europe: 16.565.000

(excl. Baltic States and Nordic Countries)



Non EU Member States indicated with italics

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

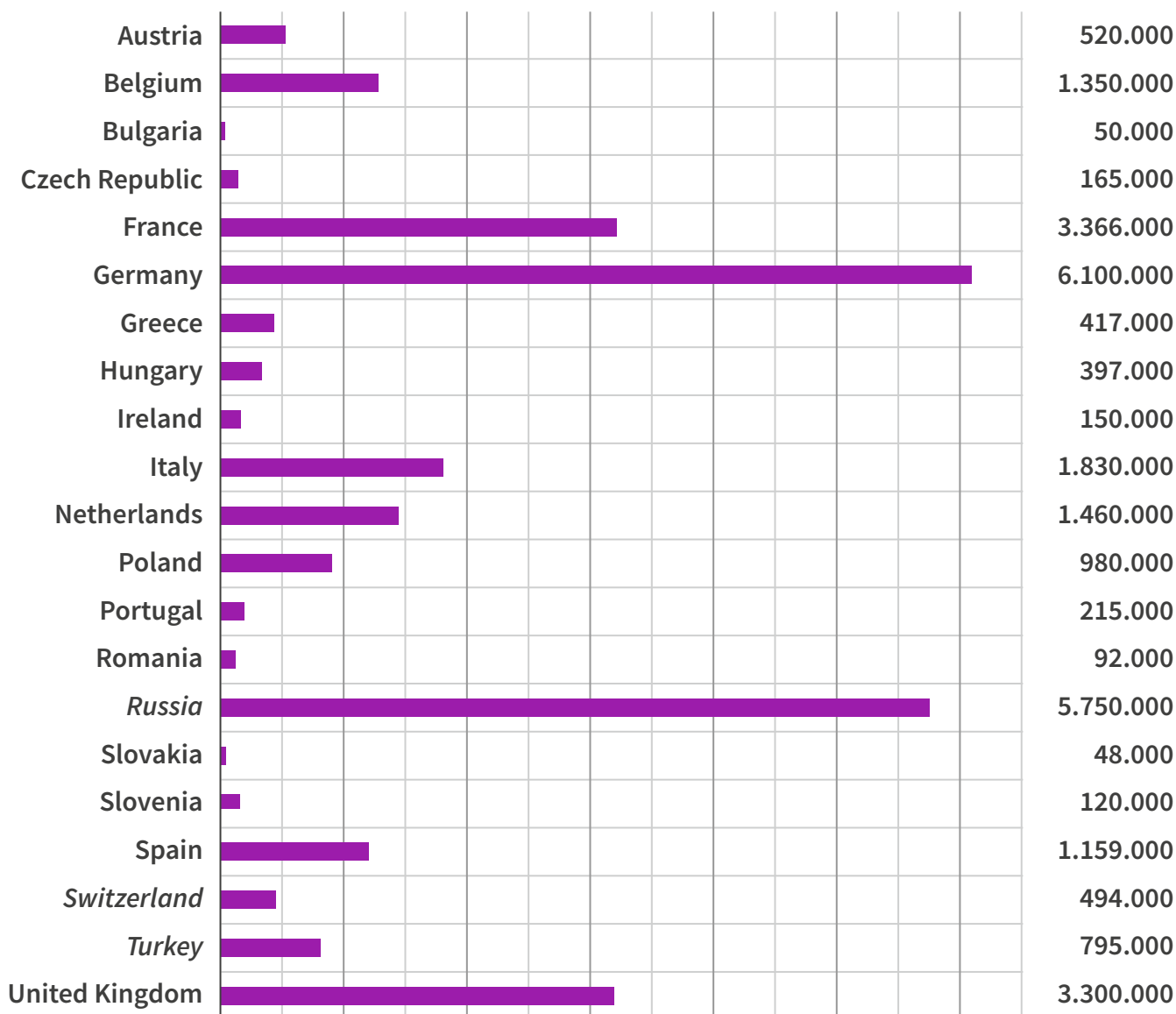
FACTS & FIGURES 2017

European small mammal population



Total European Union: 21.719.000
 Total Europe: 28.758.000

(excl. Baltic States and Nordic Countries)



Non EU Member States indicated with italics

Sources: Figures from FEDIAF and its member associations, pet food companies and estimations based thereupon when indicated
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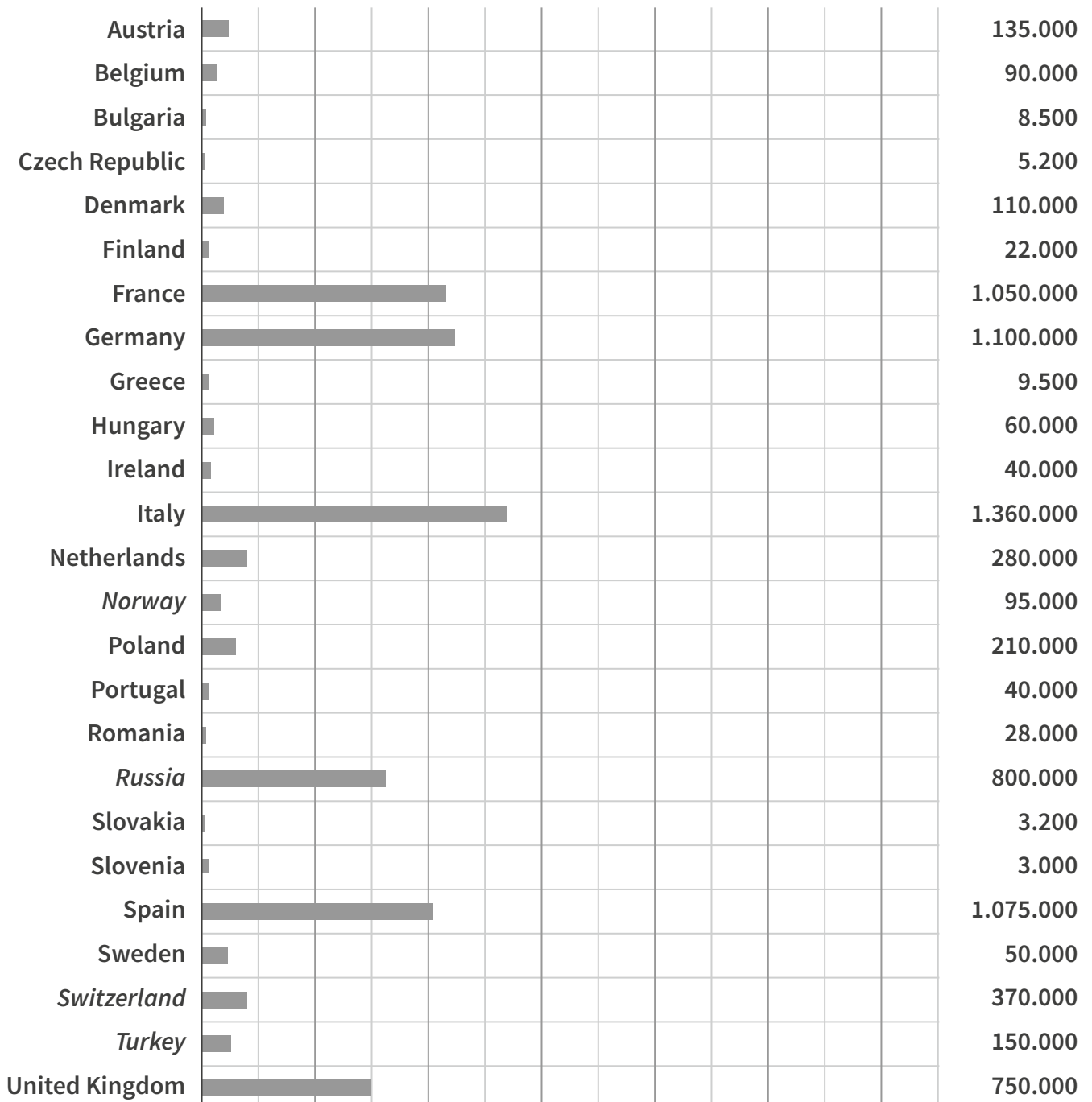
FACTS & FIGURES 2017

European reptile population



Total European Union: 6.429.400
Total Europe: 7.844.400

(excl. Baltic States)



Non EU Member States indicated with italics

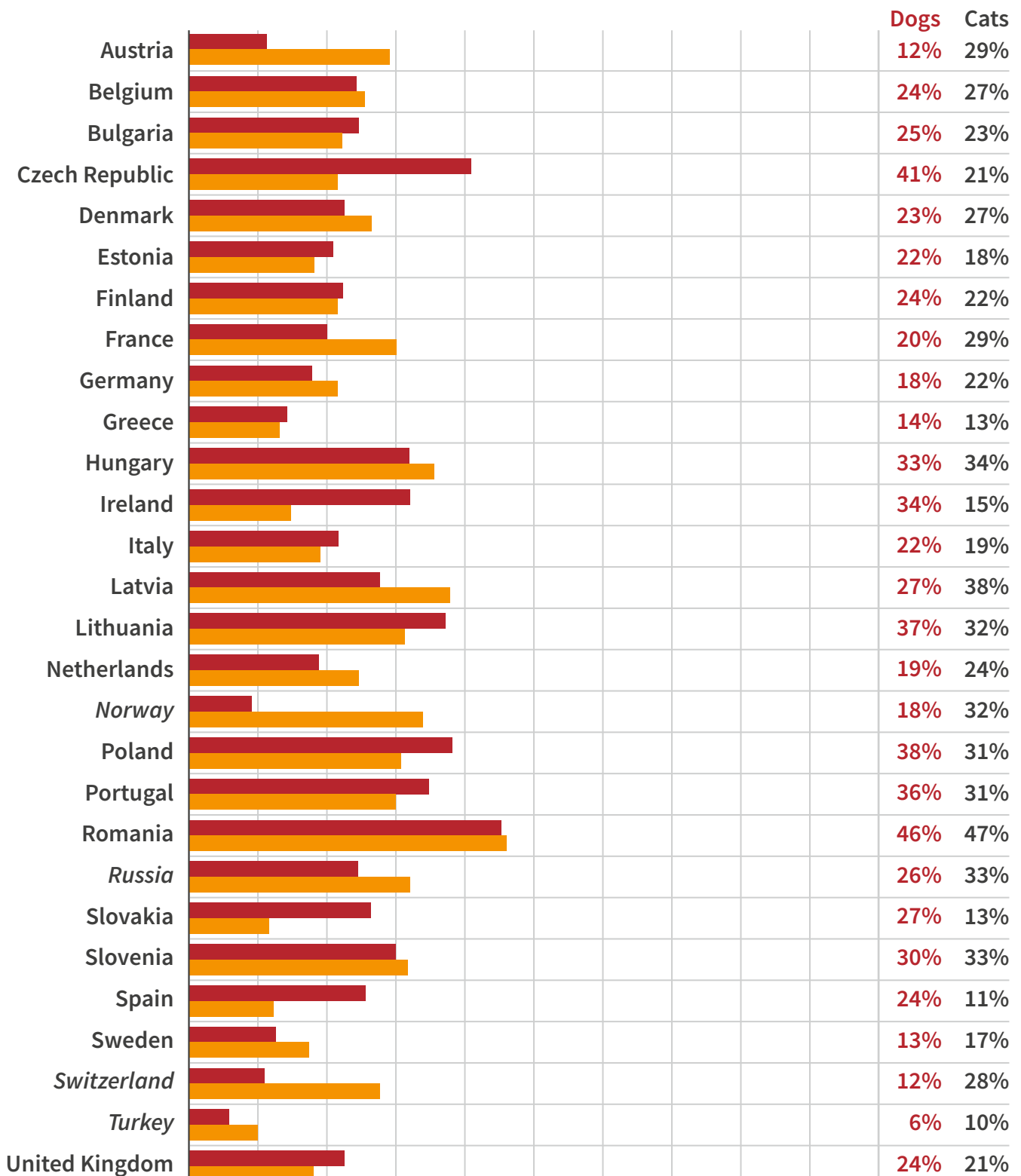
Sources: Figures from FEDIAF and its member associations, pet food companies and estimations based thereupon when indicated
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FACTS & FIGURES 2017

Estimated percentage of ...



European households owning at least one cat or one dog

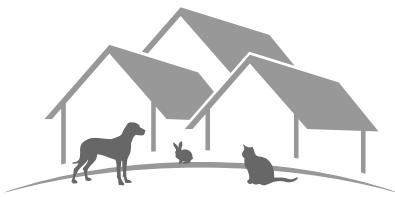


Non EU Member States indicated
with italics

Sources: Figures from FEDIAF and its member associations, pet food companies and estimations based thereupon when indicated
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FACTS & FIGURES 2017

European overview



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

80 million households

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

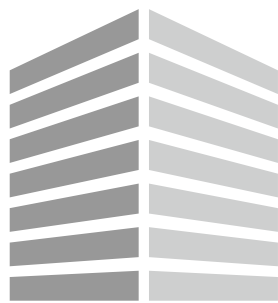
EU:
Cats 26%
Dogs 18%

Europe:
Cats 24%
Dogs 21%

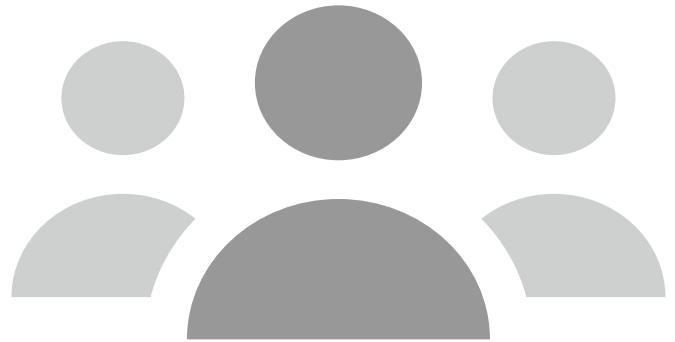


132 pet food companies

200 plants (est.)

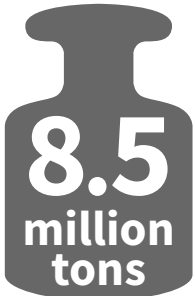


Employment



Est. direct employment:
100.000

Est. indirect employment:
900.000



Annual sales of pet food products:

Turnover: € 20.5 billion



Annual value of pet related products and services:

€ 7 billion accessories
€ 9 billion services
Total: € 16 billion



Top pets in Europe



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

2%

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

FACTS & FIGURES 2017

Top pets in Europe

Cat



Total European Union: **74.407.000**

Total Europe: **102.691.000**

Dog



Total European Union: **66.375.000**

Total Europe: **84.911.000**

Bird



Total European Union: **35.425.000****

Total Europe: **49.826.000****

Small mammal



Total European Union: **21.719.000****

Total Europe: **28.758.000****

Aquarium

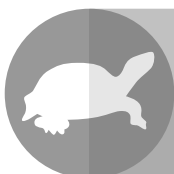
This corresponds to an estimated 300 million ornamental fish



Total European Union: **9.385.000****

Total Europe: **16.565.000****

Reptile



Total European Union: **6.429.400***

Total Europe: **7.844.400***

Sources: Figures from FEDIAF and its member associations, pet food companies and estimations based thereupon when indicated
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The European
Pet Food Industry