



The European
Pet Food Industry



Annual Report 2021





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Pet Food Industry

ANNUAL REPORT 2021



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A message from the FEDIAF President



The first year of my presidency has passed very quickly and it has been a truly fulfilling time working with the new secretariat team at FEDIAF and industry colleagues from all over Europe. It has been a year marked by the covid-19 crisis, which disrupted many markets and it goes without saying that there has been unprecedented impact across society. Also, the pet food industry supply chain has had to deal with disruptions in the supply of raw materials, transportation issues and closed borders or delays in crossing. It is a testament to the agility of our industry that supply has remained constant. There was never a risk that we couldn't feed our beloved pet family members.

Across Europe we are receiving signals from many markets that pet ownership has significantly increased during the pandemic with a great number of new owners being first time pet parents. We are thrilled that all these people are now enjoying the companionship of a pet and will benefit from the rewards of having a pet. As advocates of responsible pet ownership, there are also concerns about the time to come when more people will go back to the workplace. Pets need to be trained on being alone and this should be gradually built up. More and more workplaces are also putting measures in place, which allow people to bring their pet/dog to work, which is a great development.

One of the exciting things about being president of FEDIAF at this point in time is the great work in the area of environmental sustainability. At FEDIAF we help the industry understand the European Green Deal and steer towards a more sustainable ecosystem. We have provided input on various consultations and we are currently working on the update of our Product Environmental Footprint Category Rules which were endorsed back in 2018. Environmental claims should be based on this PEF methodology.

In the annual report you can read about all the great work, which is being done by the numerous Working Groups in constructive cooperation with national and European authorities. I want to thank all the company experts who dedicate their valuable time to ensure we continuously progress as an industry and can continue to supply safe, nutritious and palatable pet food.

2020 also marked the first #PetPower event, jointly brought to life with Animal Health Europe. More to come on this cooperation in the coming year.

I can't wait!

Annet Palamba

Welcome from the FEDIAF Secretary



Introduction by FEDIAF Secretary General

Dear Members,

This Activity Report is released on the occasion of the 2021 General Assembly of FEDIAF (17 June 2021), which for the second time in a row could not take place physically due to COVID-19 pandemic restrictions. The report provides a snapshot of the “state of play” of the pet food industry and covers the key policy areas where FEDIAF has been actively involved in 2020. Undeniably, 2020 has been a challenging year for people and industries across the world. We are proud that amongst all the losses and disruption, the European Pet Food Industry has found the necessary resilience and ability to adapt. There is certainly trust that scientific developments, continued good leadership and motivated people will soon provide the necessary advances to consider the pandemic as history.

For the FEDIAF office, 2020 has also been a year of change and renewal, and I believe we have managed to have a smooth transition, while continuing the good work to support FEDIAF’s members and the European Pet Food Industry in general. I started my position in

September and have been immediately impressed by the level of involvement and commitment of all the association members and experts.

I am proud to be part of an industry that not only provides the best nutritional products to pets while caring for the environment, but that is also very much devoted to giving guidance on responsible pet ownership and to promoting the many benefits of pets to people, as a wealth of scientific research proves. We can be proud of the accomplishments of FEDIAF in 2020. In particular, I would sincerely like to thank the FEDIAF President, but also members of the Executive and Review Committees, TASAG and all our experts for their commitment, time and dedication in supporting the efforts of the secretariat to drive successfully all the activities of the association. Last but not least, warm thanks to my colleagues, Alice and Jakub, who form the best possible team, and have shown their professionalism, motivation and agility especially in the last few months.

Raquel Izquierdo De Santiago

Overview of the Pet Food Industry in 2020

Key milestones

10.

Feed Materials and Trade

Navigating the Brexit challenge; establishing the UK as a 'third country'; focus on exports to third countries – Ukraine and Turkey.



Environmental Sustainability

Publication of the packaging position paper; establishing the Technical Secretariat to update FEDIAF PEFCR and participation at the public consultations on green claims and packaging and packaging waste directive.

12.

14.

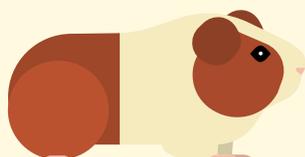
Nutrition and Analytical Science

Update of the Nutritional Guidelines.

PARNUTS Task Force

The finalisation of the outstanding oxalate dossier.

16.



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.

18.

Feed Hygiene and Safety

20. Together with the GAPFA Safety and Trade workstream, working with OIE so that pet food is recognised by the organisation, ensuring the ease of international trade.

Additives and Undesirable Substances

FEDIAF compiled and submitted a dossier to EFSA to support the continued use of BHA in Cats and continues to provide scientific evidence where needed for renewed registration.

23.

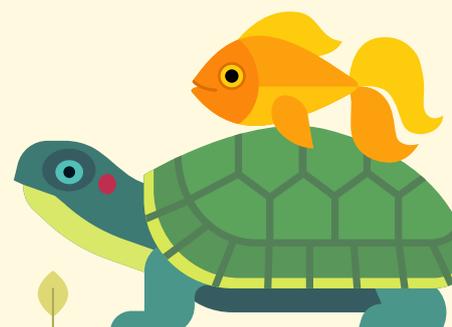
Communications

28. Increased social media engagement by creating a LinkedIn FEDIAF profile and publishing content two to three times a week. Published 10 factsheets and press releases on a wide range of topics.

Created a 'thank you' video for all the workers in the pet food industry during the COVID-19. Built a database of facts around the health benefits of pet ownership and organised a virtual #PetPower event, attended by more than 300 guests, to promote the positive role of pets in society



28.



A. Feed Materials and Trade

Introduction

The Feed Materials and Trade Working Group comprises industry experts with a specific focus on animal derived raw materials in addition to an in-depth 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 make any proposed amendment a challenge for the pet food industry. Since the 1 January 2021, the remit of the working group also includes checking the parallel regulatory developments in the UK. As the closest 3rd country without an SPS (Sanitary and Phytosanitary) agreement, any differences could create non-tariff barriers.

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

Objectives



Maximise opportunities for FEDIAF members to market their products:

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

Achievements Brexit- the practical implications



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

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

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

As a working group, the focus was on maintaining free trade and ensuring that 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. In addition, together with the experts from the UK’s PFMA (Pet Food Manufacturers’ Association), the practical details moved centerstage, such as “how to fill in an export health certificate for entry into the EU”. Teaming up with PFMA, FEDIAF organised a number of seminars to support members before and after the 31 December deadline.

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

Achievements Cooperating with legislators



The group has worked on amendments of the:

- ▶ Key EU export markets (focus on Ukraine): Monitoring developments and highlighting opportunities for improving cross border trade. Explaining to the EU commission’s stakeholders that their continuous support matters a lot to the industry.
- ▶ EU Animal By-Products Regulation & TSE Regulation: Monitoring developments and ensuring a proportionate regulatory environment

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

B. Environmental Sustainability

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 October 2019, FEDIAF launched its Environmental Sustainability WG in order to embrace the challenges ahead and contribute efficiently to the forthcoming policy shaping. The group has successfully been formed from representatives from main brands and players, including national trade associations and sustainability experts. There are two main focus areas: Product Environmental Footprint (PEF) & packaging.

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 favourable 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 transparent communication rules.
- ▶ Turn the challenge of the new packaging recycling targets set in the Packaging & Packaging Waste Directive into business opportunities, which drive innovation, and clarify the recycling challenge both for pet food manufacturers and pet owners.

Achievements



- ▶ Successful formation of the working group, including the technical secretariat
- ▶ Release of the packaging position paper
- ▶ PEF update working stream
- ▶ FEDIAF participation at the public consultation on green claims
- ▶ FEDIAF participation at the public consultation on packaging and packaging waste directive
- ▶ Assessment of the consolidated packaging data received from Euromonitor



C. Nutrition

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



Energy requirements in puppies – introduction of new predictive equation.

A working group with members of both the Scientific Advisory Board and the Nutrition Working Group have reviewed the current FEDIAF recommendations for the energy requirements of puppies.

The accurate calculation of metabolizable energy (ME) requirements is essential to ensure up-to-date feeding recommendations to support healthy growth. It is important to prevent an excessive energy supply in young dogs, which can lead to accelerated growth and thus lead to developmental orthopedic disease.

The current stepwise equation was compared to a recently published equation (Klein et al., 2019). It was found that the Klein equation, which is based on energy intake in client owned puppies, allowed for more accurate calculation by age. Therefore, it was decided to exchange the current stepwise equation by the Klein et al. equation.

Safety of Phosphorus in cats – footnote updated

The Scientific Advisory Board and the Nutrition Working Group have analysed the latest scientific publications and reviewed the latest research results from the Waltham Science Institute to establish a safe level for Phosphorus, from highly soluble sources. The findings were included in the update of the footnote. However, it was stated that more research is needed to understand the impact of different sources and nutrient interactions.

Available FEDIAF resources promoted at online veterinary congress.

The 24th Congress of the European Society of Veterinary and Comparative Nutrition (ESVCN) Congress was conducted as an online conference in 2020. The digital format of the annual congress provided a great opportunity to connect nutrition scientists and experts and discuss the latest research through live Q&As.

FEDIAF adapted to the new format and secured its presence at this important event through a promotional video on available resources, which was featured several times between lectures.

D. PARNUTs

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 taskforce. 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 taskforce contributed to its finalisation
- ▶ The new PARNUTs regulation (EU)2020/354 was published in the EU Official Journal in March 2020. The taskforce welcomes this publication and thanks all parties who were involved in this work. The taskforce finalized the last Q&A and proposed draft amendment on the formation of oxalate stones ahead of the April 2021 Standing Committee



E. Product Communication

Introduction

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

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

This evolution requires the Working Group to include these various product communication methods within their scope.

Pet food, although under feed regulation, has its own specificities, which FEDIAF has to ensure are taken into account by EU authorities:

- ▶ Pet food has preprinted packs/labels. As a result, even minor changes in legal labelling have a very high impact, both from an economic and environmental point of view.
- ▶ Most pet food products are complete (i.e., the only meal for an animal). Producers need to ensure that all required nutrients are present and in adequate amounts. Therefore, a great variety of feed additives is needed.





Objectives



- ▶ Developing, maintaining, and updating the Code of Good Labelling Practice for Pet Food, which is the main tool for the pet food industry to ensure a “level playing field” in terms of product communication
- ▶ Ensuring the use of the Code by all stakeholders (manufacturers, enforcement authorities, retailers, on-line shops, etc.)
- ▶ Responding to regulatory and market challenges in the field of labelling and product communication, which require a common position and answer from the pet food industry
- ▶ Working together with the European Commission to ensure that pet food’s specificities in terms of labelling are taken into consideration

Achievements Labelling Code e-learning



After almost a year of work, the new e-learning course was finished mid-2020. Endorsed by the European Commission, this innovative, user-friendly, and interactive tool will make the Code more accessible and help improve labelling knowledge.

The e-learning course is an open-access tool, available to everybody interested in pet food labelling. It contains a series of self-assessment questions and a final section with sample labels in order to check the learnings.

The course can be found on FEDIAF’s website and is prepared for a variety of IT platforms (PC, Android or Apple devices):

https://fediaf.org/labelling_code_v08/curso/index.html

Achievements Organic Pet Food

The new Regulation on Organic Production (R. 2018/848), which will come into force on 1 January 2022, unlike the previous Regulation, fully includes pet food (as feed) within its scope.

Previously, organic pet food has been based on national rules or private standards accepted or recognized by member states. This new regulatory environment means that organic pet food needs to fulfil all the requirements as organic feed.

The working group has identified two main issues: getting a smooth transition from the country-based regulation to the new EU-based and ensuring that pet food can be produced following these new rules.

The smooth transition has been granted by the Commission. The working group is still working on the second issue, in particular on securing authorization for the use of essential additives, which will allow the industry to continue producing organic pet food.

F. Feed Safety & Hygiene

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 was developed in the course of 2020 and made available on the FEDIAF website.

Objectives



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

Achievements together with GAPFA



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,
- ▶ Longer term aim of having an OIE pet food model health certificate for international trade





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 diets to pets across Europe. They are also key to ensuring products achieve the high levels of pet and owner acceptance in terms of flavour, texture and appearance that enables the European pet food business to thrive.

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

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

Objectives

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

Achievements 2020

- ▶ Through a year of intense challenges, the working group and partners have come together to create and submit a dossier for BHA for cats to defend its continued use. We await and anticipate a positive outcome.
- ▶ Antioxidant Portfolio: FEDIAF is working to secure the remainder of the antioxidant portfolio, commissioning a tolerance study for propyl gallate, and exploring options for BHT.
- ▶ Gelling Agents: Identified strategically important hydrocolloid/ gelling agents and actively engaging with applicants to help secure reauthorisation.
- ▶ REFIT (EU) 1831/2003: Looking to secure a more flexible future in additives authorisation, the working group has been active in creating and sharing our position on the ongoing restaging discussions for the additives legislation.
- ▶ Undesirable Substances: Key contributor to ongoing discussion regarding mycotoxin regulated limits in feed. Working to secure a favourable outcome for the feed industry.

H. Analytical Science

Introduction

FEDIAF's mission is to facilitate the supply of safe and nutritious products. Over recent years, challenges have emerged, prompted by external reports on contaminants or nutritional parameters. These have often been combined with an unclear view of the robustness of the applied method. In addition, we have seen a need for specific analytical methods to support the additives re-authorisation process.

The working environment of pet food manufacturers could clearly benefit from a reference point for all topics and questions related to analytical methods. To respond to this demand, FEDIAF has taken the decision to set up a new horizontal Working Group on Analytical Science.

The mission of the Analytical Science Working Group is to provide support on analytical methods related to the supply and safety of raw materials and pet food products. The Group will provide internal advice to other Working Groups as well as externally to other trade associations. In addition to this consulting role, the Analytical Science Working Group will actively drive industry recommendations on the development and usage of analytical methods.

During the kick-off meeting in March 2021, the newly formed group of industry experts agreed on ways of working and had an introduction to topics under discussion. The activities of the Working Group will be uplifted progressively in 2021, interacting with the Nutrition Working Group and Additives & Undesirable Substances Working group.

Objectives



Analytical methods are the backbone and reference in all issues related to supply and safety of raw materials and pet food products. The objectives of the Analytical Science Working Group are:

- ▶ Support in advocacy and liaison with authorities and other external stakeholders
- ▶ Provide overview of possible Analytical Methods with a focus on pet food as a matrix
- ▶ Promote best practice when validating and using Analytical Methods in pet food matrix, related to validation, usage, and interpretation of results





I. Small Pets

Introduction

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

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

During its kick-off meeting in February 2021, the governance of the group and the focus of activity was developed. The activities of the Working Group will be uplifted progressively in 2021.

Objectives



The initial objectives of the Small Pets Working Group are:

- ▶ Develop nutritional guidelines for a wide range of new species including goldfish, pet birds, guinea pigs, etc.
- ▶ Produce educational resources for pet care professionals and pet owners
- ▶ Provide expertise on nutrition on small pets, including exotics

J. Communication

Introduction

The 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 a positive attitude among stakeholders regarding the role of pets in European society, and to build trust and transparency in the 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 our messaging framework, the stakeholder engagement plan and assessing how we can make an impact. We have also built new collaborations with stakeholders from other industries by establishing the Pet Alliance Europe where FEDIAF works alongside Animal Health Europe to promote pets in society and advocate for responsible pet ownership.

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 in 2020 included



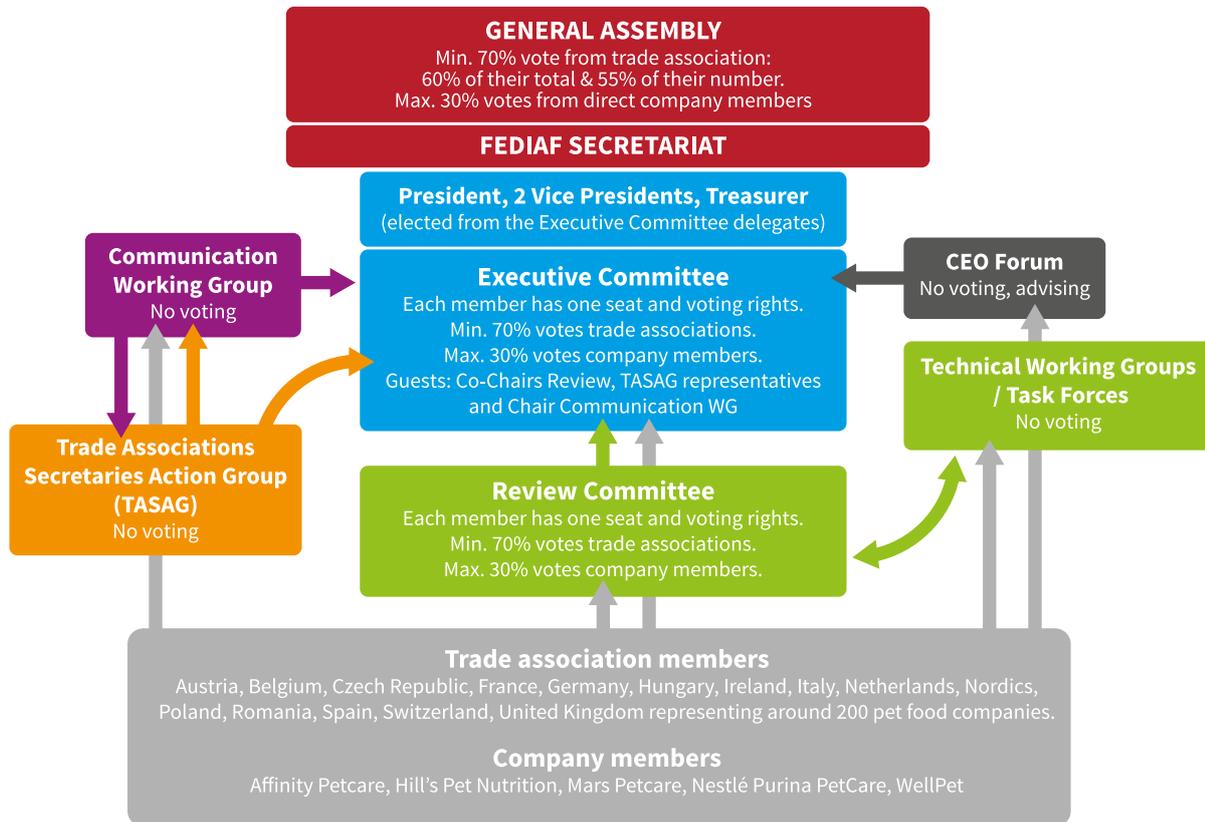
- ▶ Comprehensive review of communications framework, strategy, and stakeholder engagement plan
- ▶ Started FEDIAF LinkedIn & posted 2-3/week
- ▶ Published 10 factsheets and Press Releases on a range of topics
- ▶ When the pandemic hit, advocated to maintain the industry operating & issued a 'thank you' video for all the workers in the pet food industry
- ▶ Built database of facts around the health benefits of pet ownership, published on FEDIAF website
- ▶ Organized a virtual #PetPower event together with AnimalHealthEurope, attended by more than 300 guests, to promote the positive role of pets in society
- ▶ Attended ESVCN online Congress in September and participated "online" via slideshow played over breaks.
- ▶ 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
- ▶ Ensured a regular flow of internal communication with the FEDIAF newsletter delivered to the membership
- ▶ Project managing AGM event, which was very successful despite having to move to virtual space due to the pandemic





Governance and Structure

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



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

The Executive Committee and the General Assembly are chaired by the FEDIAF President, elected every two years. FEDIAF President June 2020- June 2022 is Annet Palamba.

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

- ▶ Additives and Undesirable Substances
- ▶ Feed Safety and Hygiene
- ▶ Product Communication
- ▶ Nutrition
- ▶ Analytical Science
- ▶ Feed Materials and Trade
- ▶ Environmental Sustainability
- ▶ Small Pets
- ▶ Particular Nutritional Purposes

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

Executive Committee

Executive Committee Chair: Annet Palamba – NVG
Vice-chair: Christophe Carlier – FACCO
Vice-chair: Kerstin Schmeiduch – Nestlé-Purina PetCare
Gratziela Bahaciu – ARPAC
Robin Balas – Co-Chair Review Committee
Jana Burajová – SVPDZ
Rosa Carbonell – Co-Chair Review Committee
Josep Crusafont – Affinity Petcare
Irina Derksen – Hill's Pet Nutrition
Terkel Due – Nordics
Urs Eberhard – VHN
Hermann Habe – ÖHTV
Lajos Hanzel – HPFA
Robert Kaczmarek – POLKARMA
Katrín Langner – TASAG representative
Lina Lopez – WellPet
Pietro Molteni – ASSALCO
Balázs Pályi – Mars Petcare
Victor Romano – ANFAAC
Sharon Schroevers – BEPEFA
Greg Van Praagh – PFMA
Jürgen Wigger – IVH

Review Committee

Co-Chair: Robin Balas – Royal Canin
Co-Chair: Rosa Carbonell – Nestlé Purina PetCare
Izabella Balanyiné – HPFA
Josep Crusafont – Affinity Petcare
Åsa Dufva – Nordics
Irina Derksen – VHN
Pierre Jaouen - FACCO
Robert Kaczmarek – POLKARMA
Karen Elizabeth Linley – Mars Petcare
Lina Lopez - WellPet
Melinda Magdus – HPFA
Mariska Niesten - NVG
Anita Pachatz – ÖHTV
Monika Prenner – PFMA
Nicole Rabehl - IVH
Victor Romano – ANFAAC
Willeke Stroucken – NVH
Yvan Tomaselli – Nestlé Purina PetCare
Stefano Zigiotta – ASSALCO

Trade Association Secretaries Action Group (TASAG)

Chair: Raquel Izquierdo de Santiago – FEDIAF
Antonella Baggini – ASSALCO
Gratziela Bahaciu – ARPAC
Benita Beekhof – NVG
Michael Bellingham – PFMA
Aurélié Bynens, FACCO
Santiago de Andres - ANFAAC
Marcus Eigner – ÖHTV
Stefan Emmenegger – VHN
Magda Hrabcova – SVPDZ
Katrín Langner – IVH
Shane Lyster – PFAI
Ewa Lucyk – BEPEFA
Maciej Przewdzia – POLKARMA
Tamás Racskó – FHF
Elien Van Stichel – BEPEFA

Communication Working Group

Chair: Dieter Meyer – Vitakraft
Antonella Baggini – ASSALCO
Alejandro Ludert – Mars Petcare
Nicole Paley – PFMA
Balázs Pályi – Mars Petcare
Sharon Schroevers – Hill's Pet Nutrition
Catherine Theron – Nestlé Purina PetCare

Additives and Undesirable Substances Working Group

Chair: Matthew Elliott – Mars Petcare
Vice-chair: Paula Wartelski – Nestlé Purina PetCare
Helen Clegg – Mars Petcare
Geoffrey Daniel – Royal Canin
Irina Derksen – Hill's Pet Nutrition
Emanuel Fischbacher – Bosch Tiernahrung
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
Amélie Serment - Nestlé Purina PetCare
Boris Terlinden – Rondo Food
Martin van Bohemen – Hill's Pet Nutrition
Dagmar Zähringer – Nestlé Purina PetCare

PARNUTs Task Force

Chair: Robin Balas – Royal Canin
Laurence Colliard – Nestlé Purina PetCare
Lisa Conboy – Nestlé Purina PetCare
Irina Derksen – Hill's Pet Nutrition
Isabelle Jeusette – Affinity Petcare
Karin Kühn – Bosch Tiernahrung
Isabelle Leriche – Virbac
Francis Pastoor – Dechra Veterinary Products
Dennis Smit - United Petfood
Ingrid Van Hoek – Royal Canin
Ariane Wehrmaker – Saturn Petcare

Nutrition Working Group

Chair: Thomas Brenten – Royal Canin
Vice-chair: Lisa Conboy – Nestlé Purina PetCare
Iveta Becvarova – Hill's Pet Nutrition
Catherine Bogaert – Neodis
Jean Christophe Bouthegourd – Nestlé Purina PetCare
Petra Hellweg – Mars Petcare
Isabelle Jeusette – Affinity Petcare
Karin Kühn – Bosch Tiernahrung
Massimo Pagani – United Petfood
Francis Pastoor – Dechra Veterinary Products
Libby Sheridan – Nestlé Purina PetCare
Dennis Smit - United Petfood
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
Vice-chair: Ursula Huber - Royal Canin
Robin Balas – Royal Canin
Barbara Rondo Brovetto – Nestlé Purina PetCare
Aurélié Bynens – FACCO
Ignacio Conde – Affinity Petcare
Irina Derksen – Hill's Pet Nutrition
Martina Gerndt – Mars Petcare
Aline Hartman – Partners in Pet Food
Kounawit Heng – Nestlé Purina PetCare
Sarka Hrubcova – Hill's Pet Nutrition
Lynn Insall – PFMA
Shane Lyster – PFAI
Sabine Mladenovic-Spiss – Ospelt
Massimo Pagani – United Petfood
Balázs Pályi – Mars Petcare
Stephane Peeters – Spectrum Brands
Benjamin Petiteau - FACCO
Mindaugas Rupsys – Mars Petcare
Silke Santana - Nestlé Purina PetCare
Alfred Schloesser – Nestlé Purina PetCare
Andreas Thoben – Vitakraft
David van Belle – Wellpet
Kristel Wolfs - Wellpet

Analytical Science Working Group

Co-Chair: Jean-Louis Paillot - Nestlé Purina PetCare
Co-Chair: Ingrid Van Hoek – Royal Canin
Tobias Gorniak - Fihumin
Gianandrea Guidetti - SANYpet SpA
Elena Hijosa Velasco – Dibaq Group
Cécile Soltane - Virbac Nutrition
Klaus Tesch - Saturn Petcare

Product Communication Working Group

Chair: Victor Romano – Affinity Petcare
Vice-chair: Monika Prenner – Nestlé Purina PetCare
Michael Alvermann – Saturn Petcare
Jean-Christophe Bouthegourd – Nestlé Purina PetCare
Irina Derksen – Hill's Pet Nutrition
Tommaso Mechelli – Affinity Petcare
Marta Maria Lacavalla – Nestlé Purina PetCare
Ines Münzfeld – Mars Petcare
Stephane Peeters – Spectrum Brands
Ilara Pesci – Royal Canin
Marina Stoeckel – Saturn Petcare
Willeke Stroucken – Partners in Pet Food
Andreas Thoben – Vitakraft
Klaus Tesch – Saturn Petcare
Balázs Pályi – Mars Petcare
Laetitia Rouille – Nestlé Purina PetCare
Manou Goeminne – Versele-Laga
Maria Luisa Valentini – Nestlé Purina PetCare
Shane Lyster – IBEC
Pierre Jaouen – Sopral
Marco Halff of Mulder Diervoeding – Queens Products
Aurelie Bynens – FACCO

Environmental Sustainability Working Group

Chair: Fabrice Mathieu – Royal Canin
Vice-chair: Cedric Moulin – Nestlé Purina PetCare
Omar Barcellona – Nestlé Purina PetCare
Martin Kaczara – Hill's Pet Nutrition
Franz Kainz – Ospelt
Amaya Lopez – Pet Select
Helena Kohlhaas – Vet-Concept
Pierre Martinez – Virbac
Jerome Patte – Virbac
Balázs Pályi – Mars Petcare
Caroline Ploux – Mars Petcare
Laetitia Rouille – Nestlé Purina PetCare
Christian Schünemann – IVH
Pietro Bartocci – ASSALCO
Aida Valverde – Affinity Petcare
Maarten van den Broek – Royal Canin
Paula Wartelski – Nestlé Purina PetCare
Aleš Weiner – Partners in Pet Food
Irina Derksen – Hill's Pet Nutrition
Nicole Paley Harrison – PFMA
Rodrigo Tedesco – Royal Canin
Karen Elizabeth Linley – Mars Petcare
Monika Vavrova – Hill's Pet Nutrition

Organic Task Force

Chair: Alice Tempel Costa - FEDIAF
Victor Romano – Affinity Petcare
Monika Prenner – Nestlé Purina PetCare
Jean-Christophe Bouthegourd – Nestlé Purina PetCare
Aurelie Bynens - FACCO
Ines Münzfeld – Mars Petcare
Willeke Stroucken – Partners in Pet Food
Rosalie Dijkman – Yarah Organic Petfood BV
Pierre Jaouen – Sopral
Henning Beckmann - IVH
Sara Centenaro – FORZA10
Gianandrea Guidetti – FORZA10

Small Pets Working Group

Co-Chair: Isabelle Kalmar – Versele-Laga
Co-Chair: Donna Snellgrove – Mars Petcare
Michael Bellingham – PFMA
Elena Fernández Sánchez – Dibaq
Alan Gittins – Henry Bell & Co.
Claire Hamblion – Supreme Pet Food
Sarah Hormozi – PFMA
Sam Marriage – Marriages Feeds
Juliette Marshall – Mazuri Zoo Foods
Wojciech Rosotowski – Tropical
Andrea Sassi – Spectrum Brands Italia srl
Jan-Christoph Schwarze – Tetra GmbH
Georgina Shrimpton – Beaphar
Marion Turnbull – Cargill Animal Nutrition
Barbara Venturelli – CHEMI-VIT srl
Guy Werquin – Versele-Laga



Alice, Raquel & Jakub

Annet Palamba

President, FEDIAF

(2020 - 2022)

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

Raquel Izquierdo de Santiago

Secretary General, FEDIAF

(2020 – present)

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

Alice Tempel Costa

Technical Director, FEDIAF

(2020 – present)

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

Jakub Rusek

Scientific & Regulatory Affairs Manager, 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 interface (i.a. Brussels Office Coordinator at EASAC, trainee in the European Parliament). Before joining FEDIAF in 2018, he worked in DG ENV (European Commission), dealing with waste policy.



FEDIAF Members

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

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.

FEDIAF is fully committed to promoting responsible pet ownership, to the wellbeing of pet animals, to their important social role and to the respect of sustainable development.

öhtv

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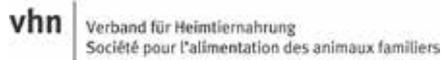
ARPAC

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Hill's Pet Nutrition

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Mars Pet Care

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Nestlé Purina PetCare

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www.wellpet.com



Glossary

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







The European
Pet Food Industry

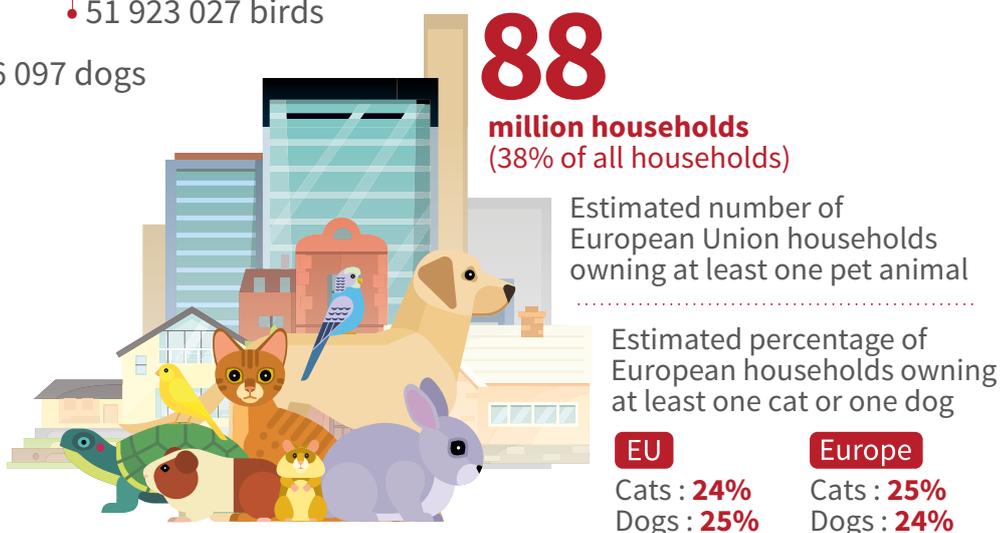
FACTS & FIGURES

2020

European Overview

FACTS & FIGURES 2020 European Overview

Top pets in Europe

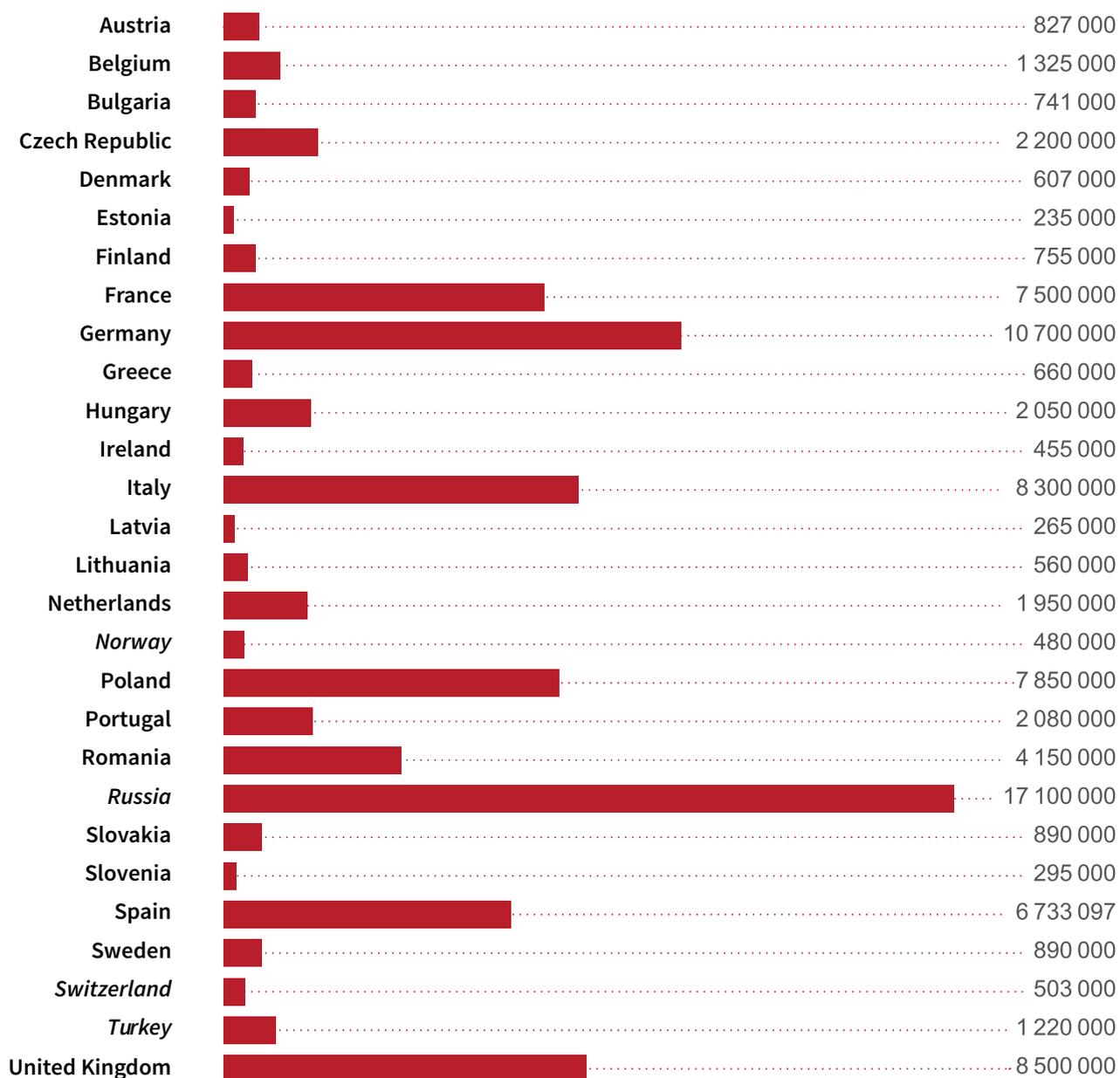


European dog population



Total European Union : 70 518 097

Total Europe: 89 821 097



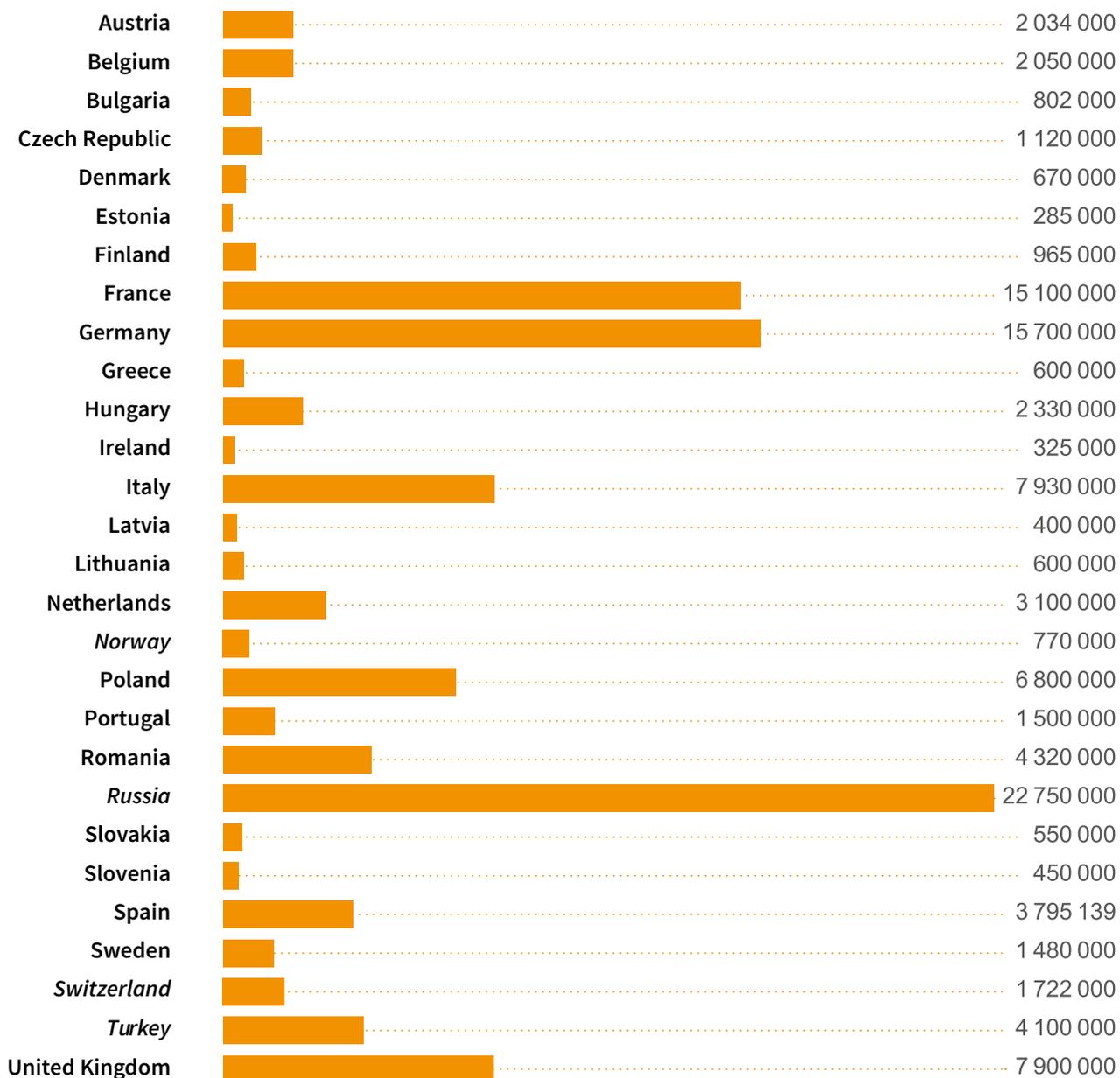
Non EU Member States indicated with italics

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

European cat population



Total European Union : 80 806 139
 Total Europe: 110 148 139



Non EU Member States indicated with italics

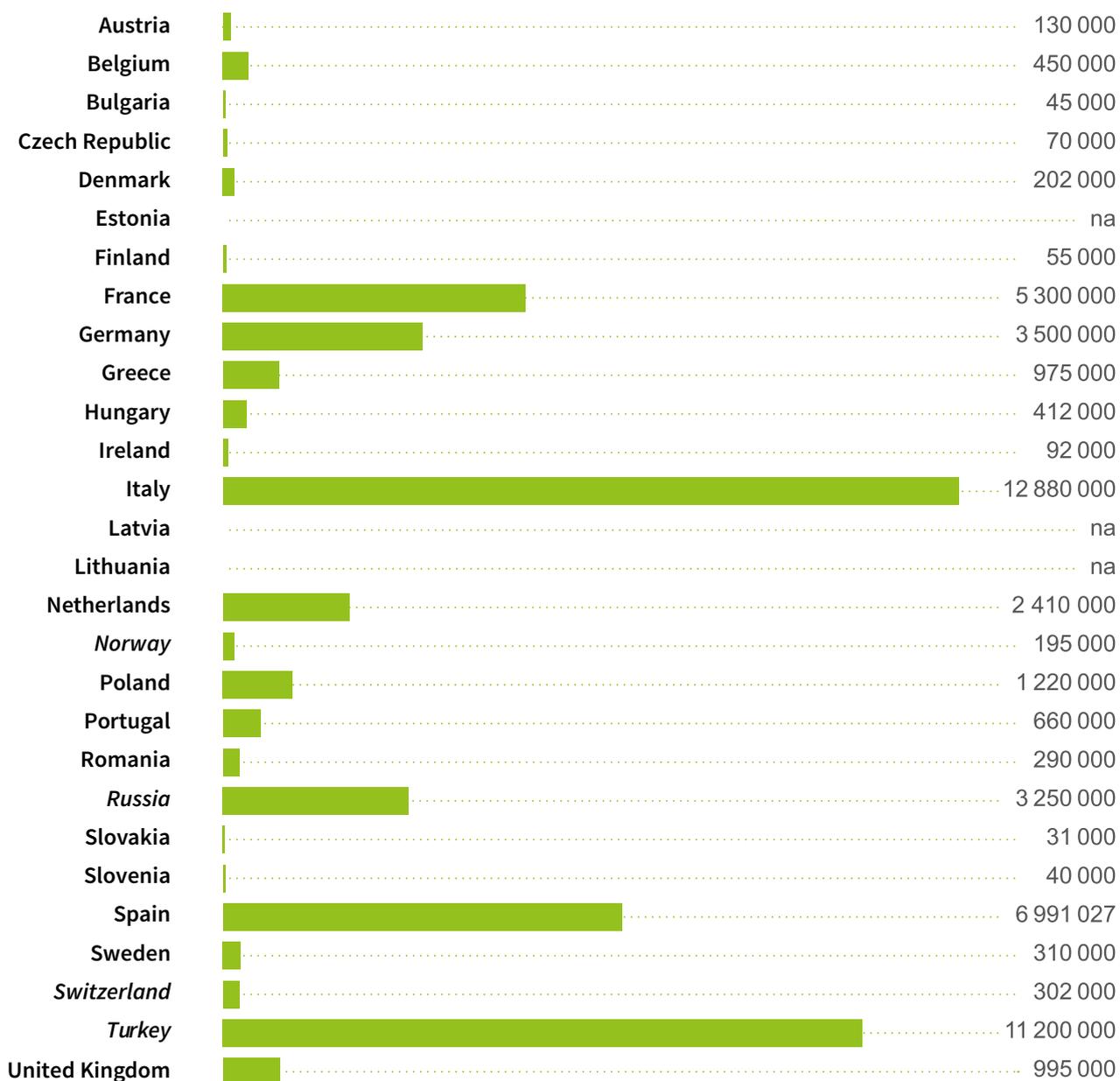
Sources: Figures from FEDIAF and its member associations, pet food companies and estimations based thereupon when indicated
 European Union/Europe: "European Union" includes the 28 Member States of the EU whereas "Europe" includes Member States of the Council of Europe

European ornamental bird population



Total European Union : 37 253 027

Total Europe: 52 005 027



Non EU Member States indicated with italics

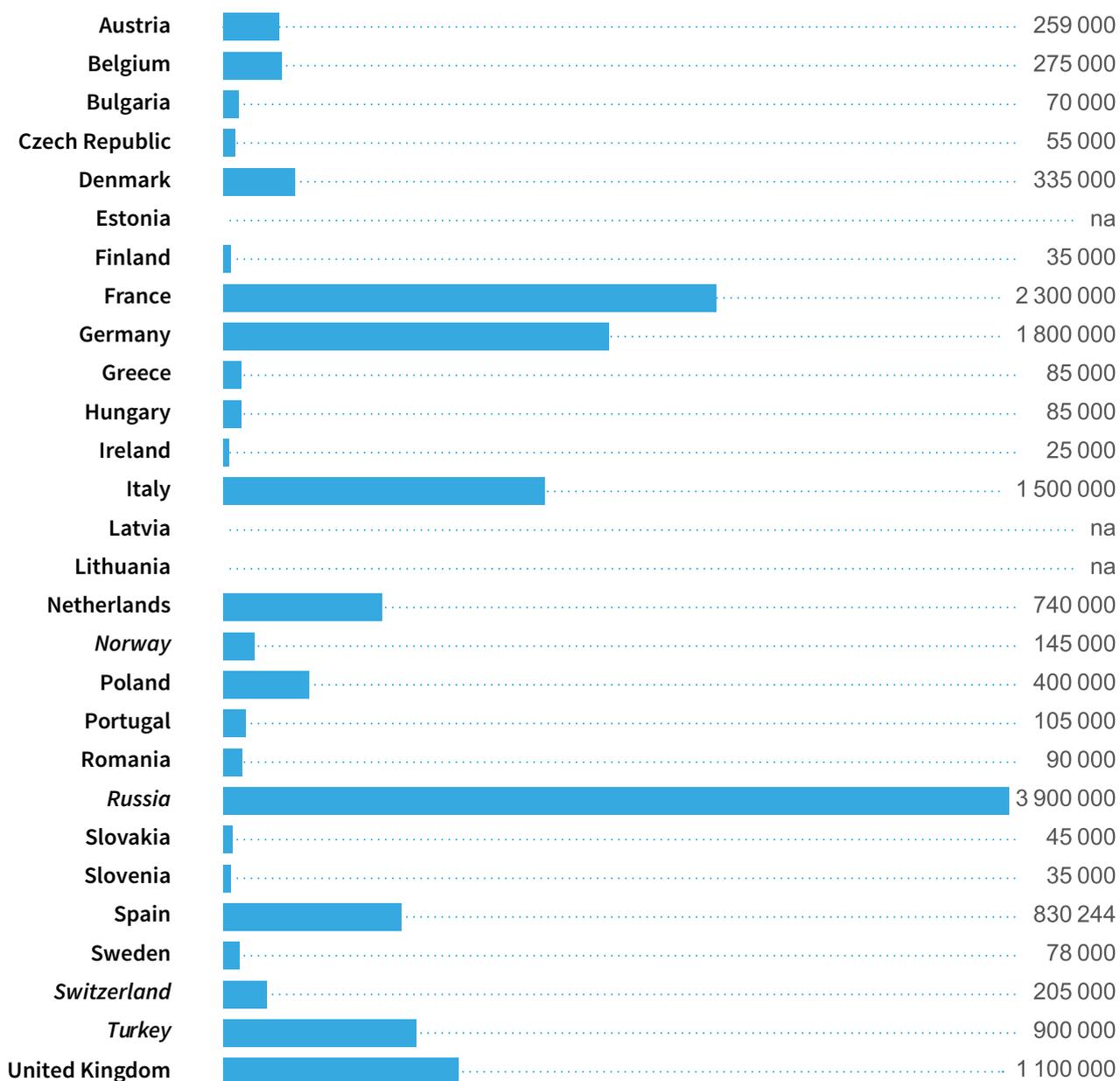
Sources: Figures from FEDIAF and its member associations, pet food companies and estimations based thereupon when indicated
 European Union/Europe: "European Union" includes the 28 Member States of the EU whereas "Europe" includes Member States of the Council of Europe

Estimated number of European aquaria



Total European Union : 15 397 244

Total Europe: 10 392 244



Non EU Member States indicated with italics

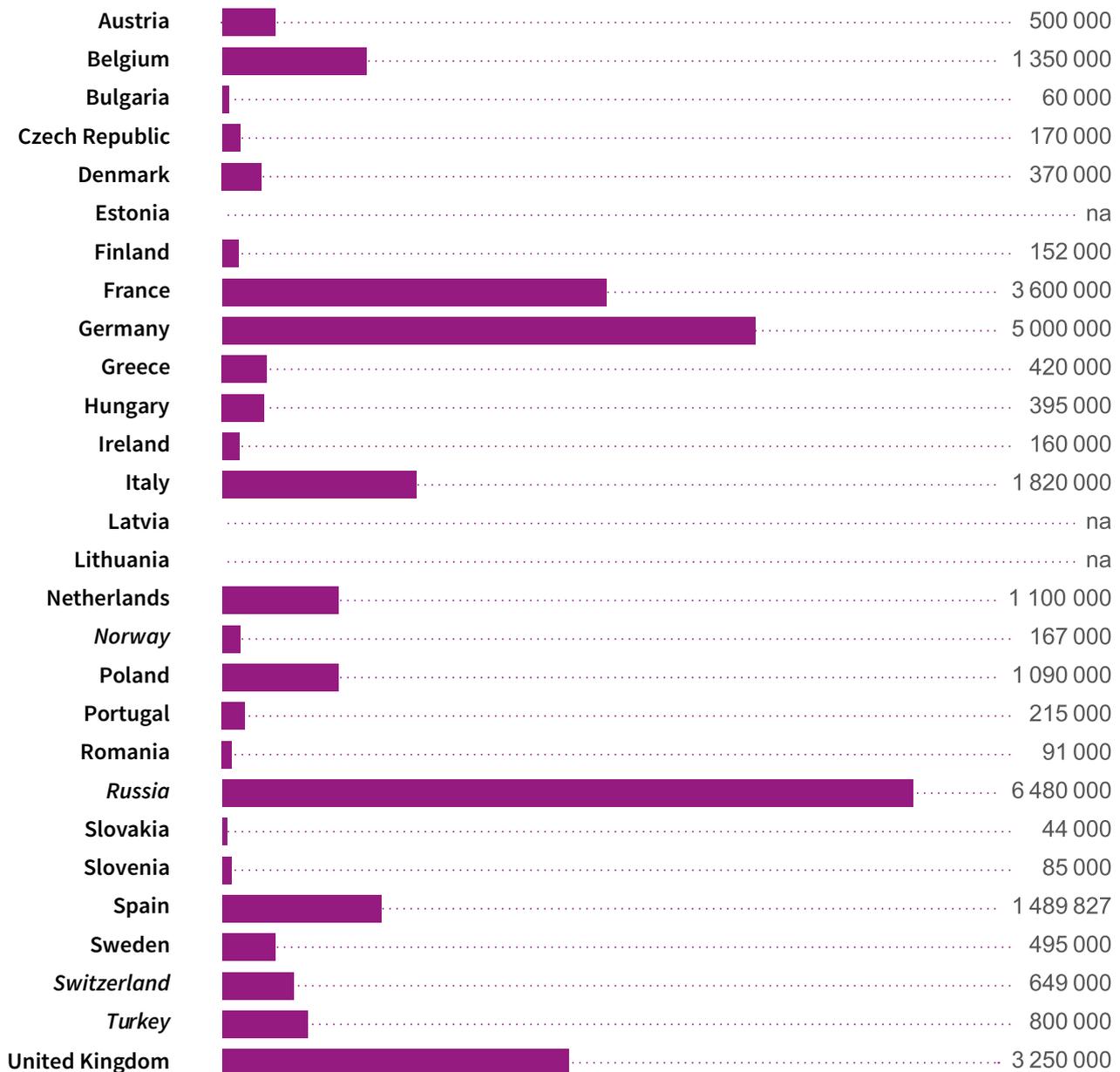
Sources: Figures from FEDIAF and its member associations, pet food companies and estimations based thereupon when indicated
 European Union/Europe: "European Union" includes the 28 Member States of the EU whereas "Europe" includes Member States of the Council of Europe

European small mammal population



Total European Union : 22 023 827

Total Europe: 29 952 827



Non EU Member States indicated with italics

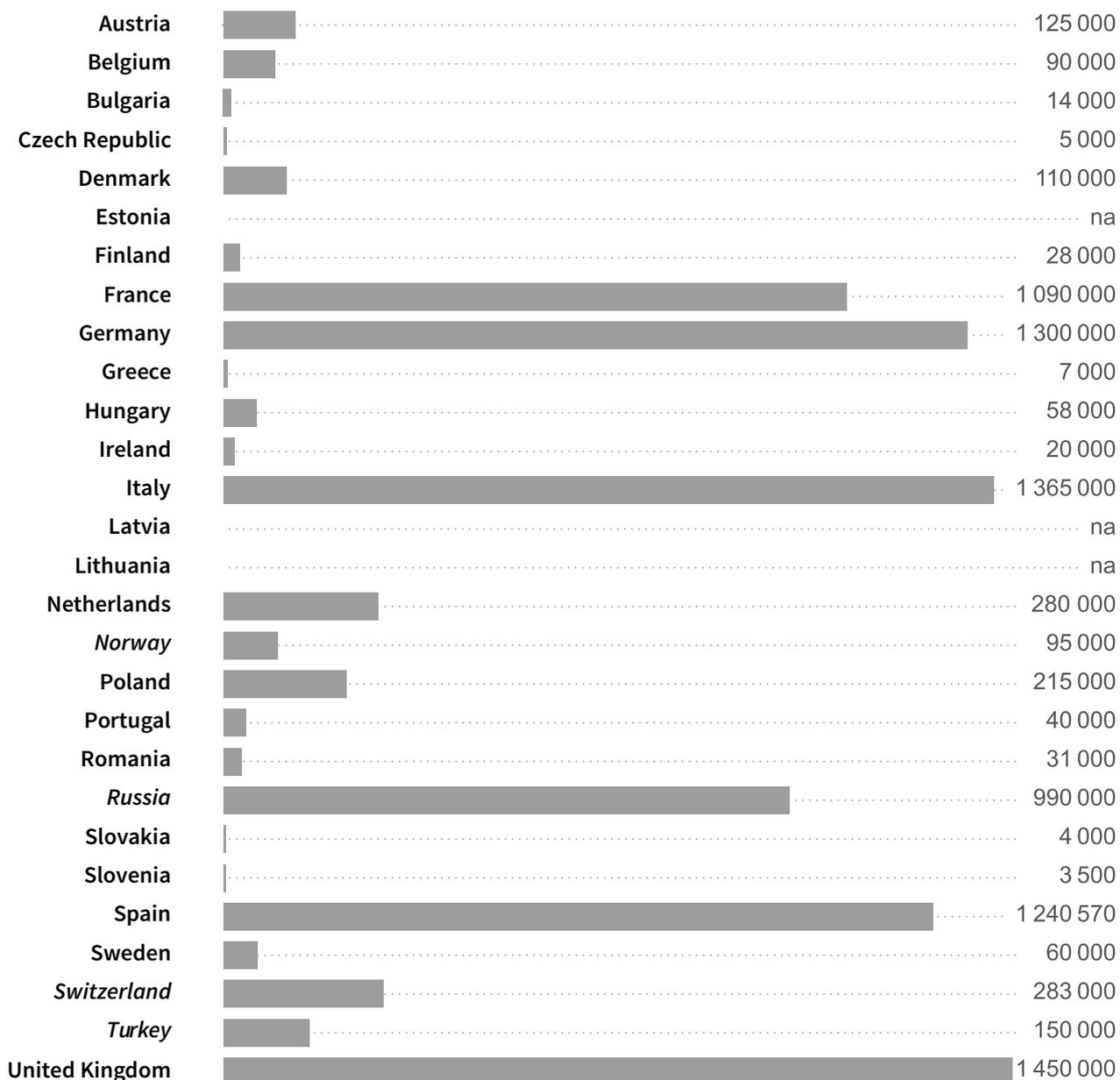
Sources: Figures from FEDIAF and its member associations, pet food companies and estimations based thereupon when indicated
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European reptile population



Total European Union : 7 536 070

Total Europe: 9 054 070



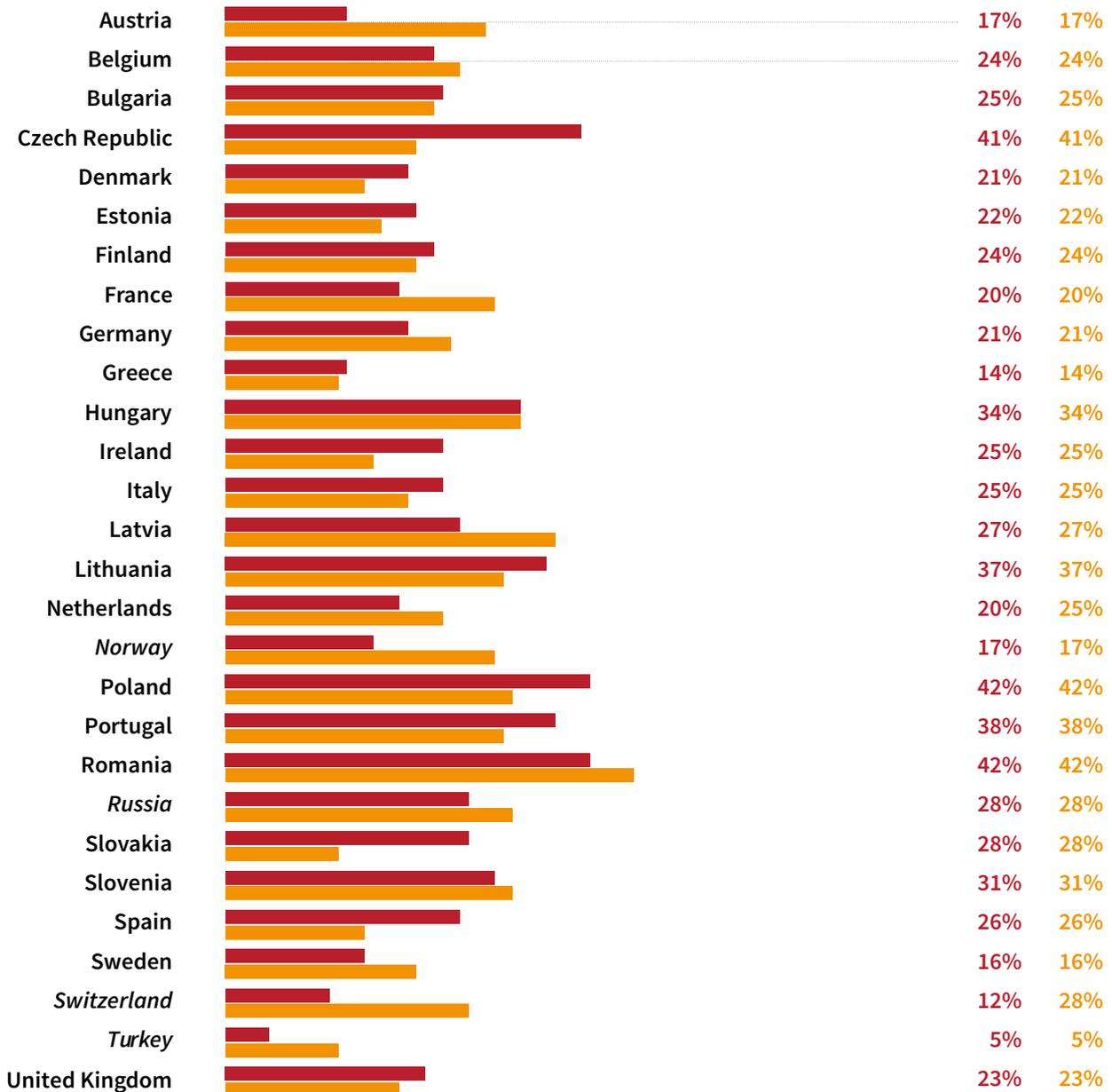
Non EU Member States indicated with italics

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

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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