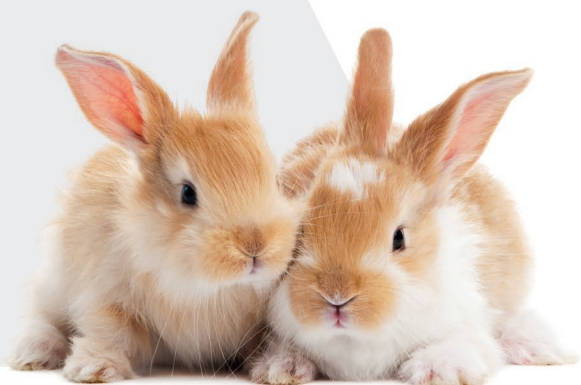


# 2025 ANNUAL REPORT





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## An Introduction from the FEDIAF President

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It is a pleasure to introduce FEDIAF's annual report for 2024/2025. Our newly released Facts & Figures featured on pages 36-46 underscore our Industry's significant role. We are responsible for producing around 9.1 million tonnes of pet food worth around 29.3 billion, which feeds around 300 million pets. This is a big responsibility, which we take seriously.



Following the European elections and the establishment of the new European Commission, the political landscape in Europe has changed. At the same time, global realities have shifted, creating uncertainties and new opportunities for the pet food industry. In preparation for this, we have been reviewing FEDIAF's strategic approach and preparing the

stepping stones for a renewed advocacy strategy, to ensure that the our industry's needs and concerns are clearly heard by stakeholders. We have also strengthened our internal communication tools, notably by introducing the FEDIAF Insights newsletter for members.

As we navigate this new reality, we remain steadfastly committed to support the pet food industry by continuing to deliver on **FEDIAF's three pillars of action: ensuring the supply of safe and nutritious pet food, championing the pivotal role of pets in society and driving sustainability from farm to bowl.**



### ENSURING THE SUPPLY OF SAFE AND NUTRITIOUS PET FOOD

The past year was marked by continuous advocacy efforts to ensure a supportive regulatory framework for the pet food industry. We have consistently emphasised the importance of maintaining access to key ingredients, including Category 3 animal fats.

Alongside this work at a European level, we have supported our National Association members with their local campaigns with a range of success levels in different markets. The provision of FEDIAF resources, factsheets, and guidance has undoubtedly empowered our members to proactively engage with local authorities, ensuring they stay ahead in their communications efforts.

Furthermore, the protection and authorisation of feed additives have continued to be a key focus for the pet food industry. As we continue to navigate these regulatory challenges, we remain vigilant in advocating for policies that prioritise safety and the long-term sustainability of our industry.



### PROMOTING THE ROLE OF PETS IN SOCIETY

Within the scope of our second pillar, FEDIAF has two primary strands of activity. Firstly, we have continued to raise awareness of the significant benefits of pet interaction and importance of responsible ownership. Our work in this area has focused on communicating the latest science and working collaboratively with our fellow Pet Alliance Europe partners. We are committed to continue our close collaboration

with AnimalhealthEurope, FVE (Federation of Veterinarians of Europe) and FECAVA (Federation of European Companion Animal Veterinary Associations) in the future, to continue championing pet welfare and underscore the positive impact of pets on the lives of all Europeans, a concept we term #PetPower.

Moreover, we have emphasised the fundamental role of nutrition in pet welfare through our contributions to the ‘feeding and watering’ components of proposed companion animal welfare legislation. We have highlighted that FEDIAF’s Nutritional Guidelines outline all the specific nutritional requirements of pets based on their life stage, health status, and activity levels.

FEDIAF takes great pride in its role in producing these comprehensive Guidelines, which are written and peer-reviewed by a Scientific Advisory Board (SAB) comprising independent board-certified veterinary nutritionists—veterinarians possessing expertise in nutrition.



#### **DRIVING SUSTAINABILITY FROM FARM TO BOWL**

In February 2025, we were delighted to publish the reviewed Product Environmental Footprint Category Rules (PEFCR) for Pet food, following a lengthy process with the European Commission and other Stakeholders. Since the beginning of our partnership with the European Commission in the development of Category Rules in 2018, we’ve remained dedicated to refining this methodology, which assesses the environmental impact of pet food products across their life cycle. This takes into account the pet food industry’s unique characteristics, such as the use of animal by-products. Independent experts and the European Commission agree that assessing the environmental impact of these ingredients through economic allocation is the most relevant approach.

We have been actively involved in the discussions surrounding the green claims directive, highlighting the importance of Category Rules and the need for PEFCRs to be recognised as a the leading method of substantiation for green claims. We firmly believe that PEFCRs enable informed decision-making to improve environmental performance and facilitate consumer product comparisons, promoting sustainable purchasing habits.

During this period, we have also been involved in the finalisation of the Packaging and Packaging Waste Regulation (PPWR), broadly supporting the Reduce, Reuse, Recycle strategy, while underscoring that reuse targets need to align with regulations mandating new packaging for processed pet food, striking a balance between environmental goals and regulatory compliance. We continue engaging the European Commission and with Member States to ensure that implementing regulations at European and National level align with this approach.

#### **A COLLECTIVE VOICE – THANK YOU**

At FEDIAF, we are proud to be the collective voice of our members, comprising 15 national associations and 5 direct companies. With your support, we are able to advocate for the interests of the pet food industry throughout Europe. Through this collective effort, we strive to make a positive impact on the lives of the 300m+ pets in Europe.

I want to express gratitude to our Deputy Secretary General, Alice Tempel Costa, for her invaluable contributions throughout 2024 and 2025, leading the Secretariat through challenging times. With Aleksandra Prandota and the new members of the Secretariat team, Rachel Addy, Delara Khodadad and Franco Garbelotto, I firmly believe we are best prepared to continue FEDIAF’s work and address future challenges. I would also like to acknowledge the significant contributions to FEDIAF’s work by Fritha Flint and James Ramsay.

Our Annual Report offers a comprehensive overview of the initiatives organised within FEDIAF’s Working Groups, committees, and task forces. Our members’ expertise and involvement in these groups are immensely valuable, and we encourage anyone interested in joining to reach out to the team.

Thank you for your continued support and we look forward to another productive year.

**ROSA CARBONELL**  
PRESIDENT, FEDIAF

## Highlights from the FEDIAF Deputy Secretary General

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Dear all,

It's often only when we pause to reflect that we truly realize how much we've accomplished. We had so many activities, meetings, events, and great achievements in 2024 but none of this would be possible without the dedication of our Chairs and members. Thank you sincerely for your invaluable expertise and ongoing support!

This report holds special meaning for me, as it also marks a personal milestone. I've been working with you for over four years now, and I still remember the very first dossiers we tackled together. Some examples of those successfully completed: the work on organic regulation, re-authorisation of important additives for the Industry, the update of nutritional guidelines, and the PEFCR update (not to mention the many factsheets we've developed and training sessions). Others are still in progress, such as the Cat3 dossier and undoubtedly, many new initiatives lie ahead.

Looking back at just the past year, there were numerous highlights. In the following pages, you'll find a comprehensive overview of our activities. Pages 6 to 11 detail the development of new materials, our participation in key events, and our digital initiatives. Then, from pages 14 to 23, you'll find a summary of the standout achievements from each of our Working Groups.

As many of you know, FEDIAF operates through seven technical Working Groups, each with a distinct focus: additives, analytical science, nutrition, product communication, environmental sustainability, feed materials, and trade & small pets. With around 200 active members contributing across these groups (supported by subgroups and task forces) we are deeply grateful for the technical expertise and commitment shown by members.

As always, we continue to warmly invite any interested members to join these efforts. You can reach us at [fediaf@fediaf.org](mailto:fediaf@fediaf.org). Participating in this collaborative work is both meaningful and impactful, helping to drive our industry forward in alignment with the goals outlined in our Pillars and Manifesto.

My final, and certainly not least, thanks go to the incredible team at Aleksandra, Franco, Delara and Rachel, our Board of Directors, and our dedicated President. Your unwavering trust, support, and guidance have meant the world to me, and I'm deeply grateful for the opportunity to grow and succeed alongside all of you. Thank you so much! Cheers to FEDIAF!

**ALICE TEMPEL COSTA**  
DEPUTY SECRETARY GENERAL, FEDIAF

# FEDIAF – EuropeanPetFood

## A Snapshot of Industry Numbers



EuropeanPetFood

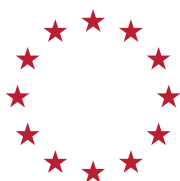
# 1970

Founded in 1970 we've been established for over 50 years



## 18

Countries represented



## 15

National Association  
Members



## 5

Member companies



## 400+

Pet food company views  
promoted throughout Europe



## 95%

Of the industry  
represented



## 200+

Members involved in  
Working Groups



## 299

Million pets fed



## 7

Technical Working Groups  
and a Communications  
Working Group



## 4

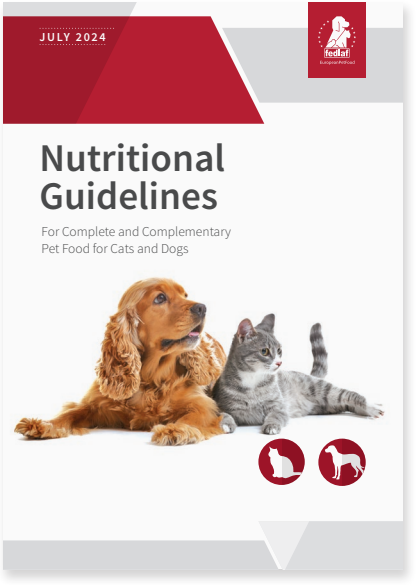
Task Forces: Animal  
Welfare, PARNUTS,  
PARNUTS Oxalate,  
Category 3

# FEDIAF – EuropeanPetFood

## A Snapshot of Events Attended and Organised

.....

There were 100+ attendees at the Annual Congress in Poland, June 2024.



Launch of the 2024 Nutritional Guidelines for Cats and Dogs at ESVN in Belfast, September 2024.



The updated Nutritional Guidelines for Cats and Dogs



100+

Attendees at Annual Congress and AGM in Poland



1

Manifesto Launched



9

Events where the Secretariat Participated as Guest Speaker

#PetPower

100+

Guests attended #PetPower event in Brussels

#PetPower took place in Brussels, September 2024.



Alice Tempel Costa and Dirk Jacobs, DG at FoodDrinkEurope, Food Drink Dialogues, February 2025.



Alice Tempel Costa with Séverine Deschandelliers (FEFANA President) and Joerg Seifert (Secretary General), June 2024.



GAPFA visit in Brussels, January 2025.



Annual Congress Panel Discussion: Matthew Elliott – Chair of the Additives WG, Paola Ferraro – DG SANTE, Joerg Seifert – FEFANA SG and Laura Payo Lewis – Argenta, June 2024.



TASAG meeting in Brussels, October 2024.



FEDIAF Board of Directors meeting, March 2025.



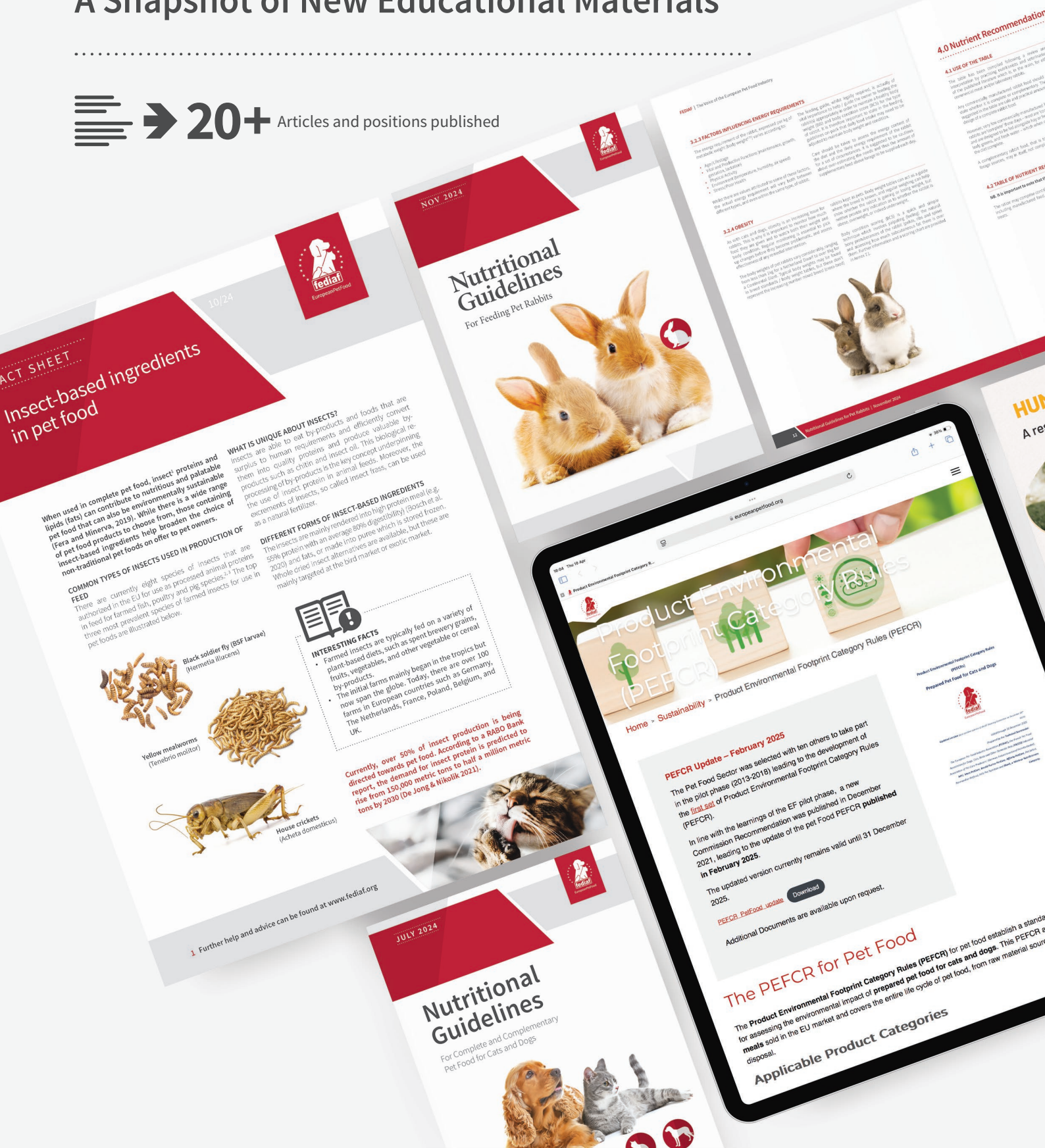
Alice Tempel Costa and Franco Garbelotto at UK Pet Food Annual Convention, November 2024.



The Environmental Sustainability WG visit to the European Parliament, March 2025.

# FEDIAF – EuropeanPetFood A Snapshot of New Educational Materials

➔ **20+** Articles and positions published



## Maintaining a healthy weight for your cat

**WHY IS IT IMPORTANT FOR YOUR CAT TO MAINTAIN AN IDEAL BODY WEIGHT?**  
Being seriously overweight impairs your cat's quality of life and possibly their life expectancy. Cats with an above healthy bodyweight are at greater risk of developing several debilitating diseases. Further, being overweight may accelerate the progression of certain diseases.

**OVERWEIGHT IS NOT A HEALTHY CONDITION, AND IT OPENS THE DOOR TO A LOT OF MEDICAL CONCERNS**

**Overweight in cats:**

- Reduces their quality of life (joint and effort tolerance, mobility, lower heat tolerance)
- Increases difficulty with routine clinical and surgical procedures at the vet clinic
- Increases anaesthetic risk
- Reduces self-healing ability

**Overweight in cats is related to, or worsens:**

- Diabetes mellitus
- Hypertension
- Osteoarthritis
- Urinary tract diseases
- Gastrointestinal diseases



**WHAT IS AN IDEAL BODY WEIGHT?**

An ideal body weight is one which is appropriate for your cat's breed, age and body frame (size). Each dog will have their own ideal body weight and maintaining this weight is important for overall health. Regular body weight recording on a weighing scale is a very sensitive method of monitoring weight change over time. Measuring weight has the advantages of being quick, easy, repeatable and objective, but it cannot distinguish between different types of body composition, for example, fat from muscle.

Body condition scoring, in addition to body weight measurement, is a quick method that considers your pet's shape and any layers of fat over their contours, to give you an idea of whether they are under, at ideal or overweight (Body Condition Score (BCS), WSAVA). The Scoring System takes practice, and it is therefore advised to consult your veterinarian for guidance and for assessment too.

www.fedial.org

## Maintaining a healthy weight for your dog

**WHY IS IT IMPORTANT FOR YOUR DOG TO MAINTAIN AN IDEAL BODY WEIGHT?**  
Being overweight seriously impairs your dog's quality of life as well as their life expectancy. Dogs with an above healthy bodyweight are at greater risk of developing several debilitating diseases and it may shorten their lifespan for up to two years compared with healthy weight dogs.

**OVERWEIGHT IS NOT A HEALTHY CONDITION AND IT OPENS THE DOOR TO A LOT OF MEDICAL CONCERNS**

**Overweight in dogs:**

- Reduces their quality of life (joint pain and decreased mobility, lower heat tolerance)
- Reduces their life span
- Increases difficulty with routine clinical and surgical procedures at the vet clinic
- Increases anaesthetic risk

**Overweight in dogs is related to, or worsens:**

- Osteoarthritis
- Heart and respiratory disease
- Pancreatitis
- Diabetes mellitus
- Some skin disorders
- Some types of cancer



**WHAT IS AN IDEAL BODY WEIGHT?**

An ideal body weight is one which is appropriate for your dog's breed, age and body frame (size). Each dog will have their own ideal body weight and maintaining this weight is important for overall health. Regular body weight recording on a weighing scale is a very sensitive method of monitoring weight change over time. Measuring body weight has the advantages of being quick, easy, repeatable and objective, but it cannot distinguish between different types of body composition, for example, fat from muscle.

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www.fedial.org

## HUMAN-ANIMAL BOND



**PetAlliance Europe**

## Protecting Pet Food Ingredients

Did you know that animal feed and pet food ingredients are classified as Category 3 animal feed products?

Category 3 animal feed products are a solid raw material for animal feed. They are usually derived from animal by-products, but they can also be derived from plant-based sources. They are used in the production of animal feed, and they are classified as Category 3 animal feed products because they are not intended for direct consumption by animals.

This notice aims to highlight the importance of protecting pet food ingredients and to ensure that they are safe for animals.

Category 3 animal feed products for pet food industry and animal feed industry are classified as Category 3 animal feed products.

The European Pet Food Industry - FEEDING PET'S IN EUROPE

Europe's pet food industry is a significant part of the European economy. It is a growing sector, and it is expected to continue to grow in the future.

According to the European Pet Food Industry Federation (FEDIAF), the European pet food industry generated a turnover of 166m in 2019.

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www.fedial.org

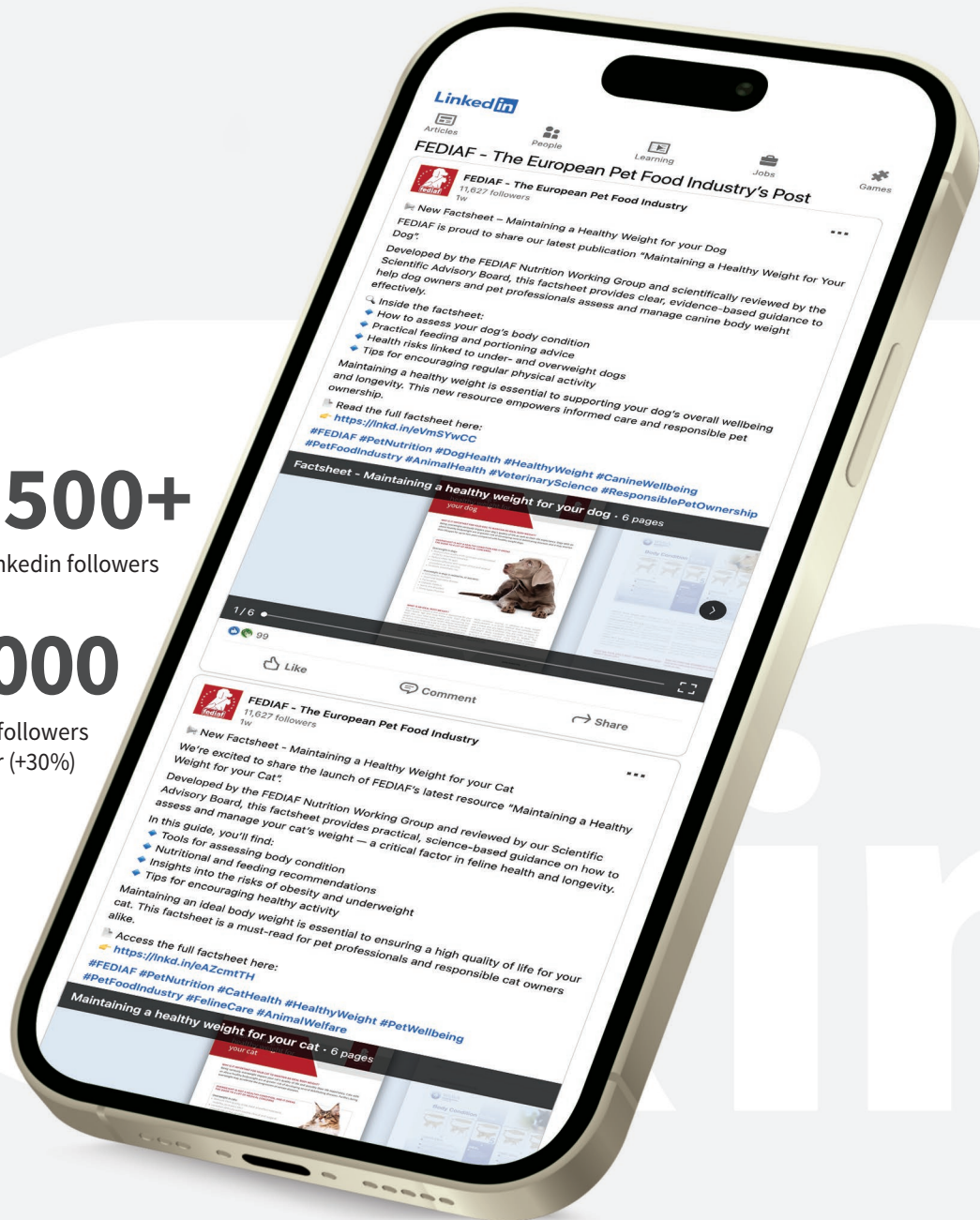


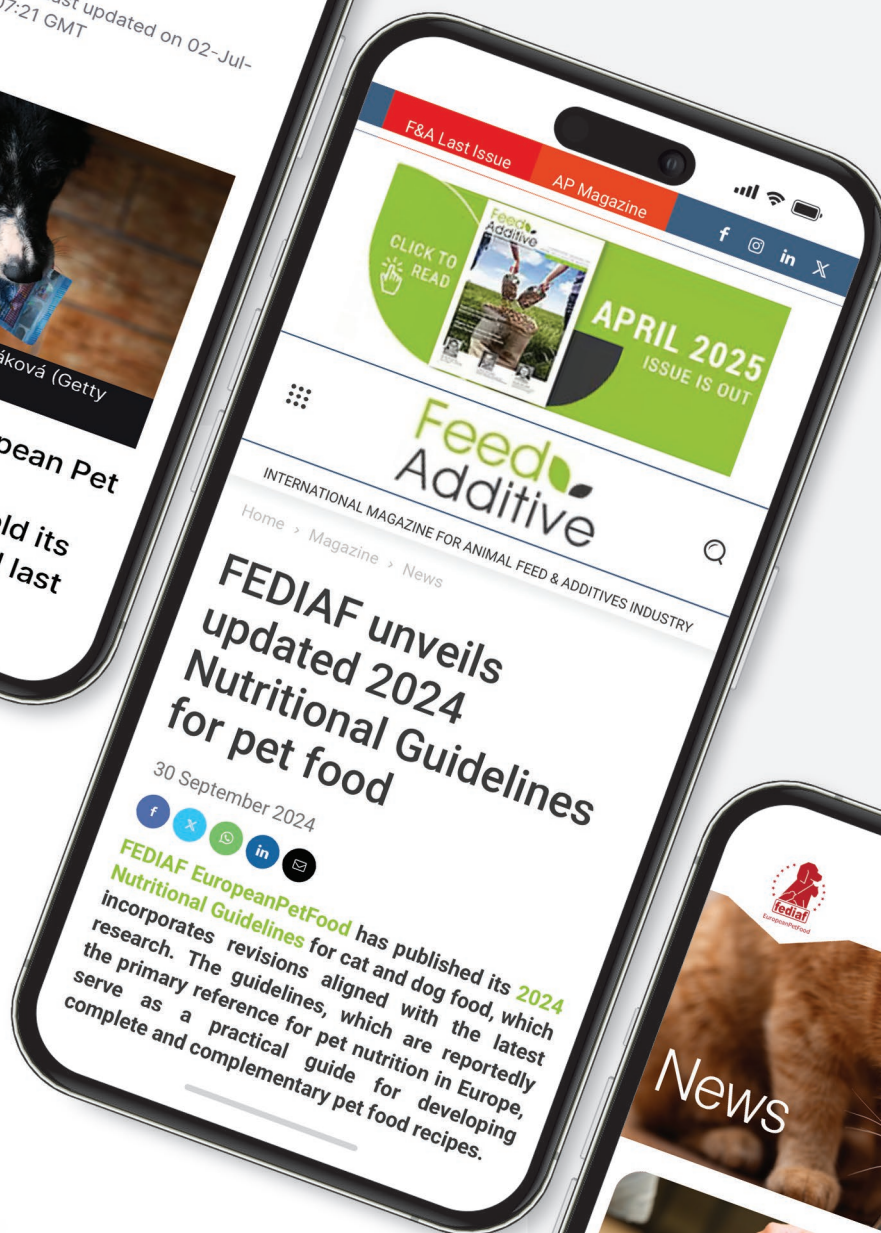
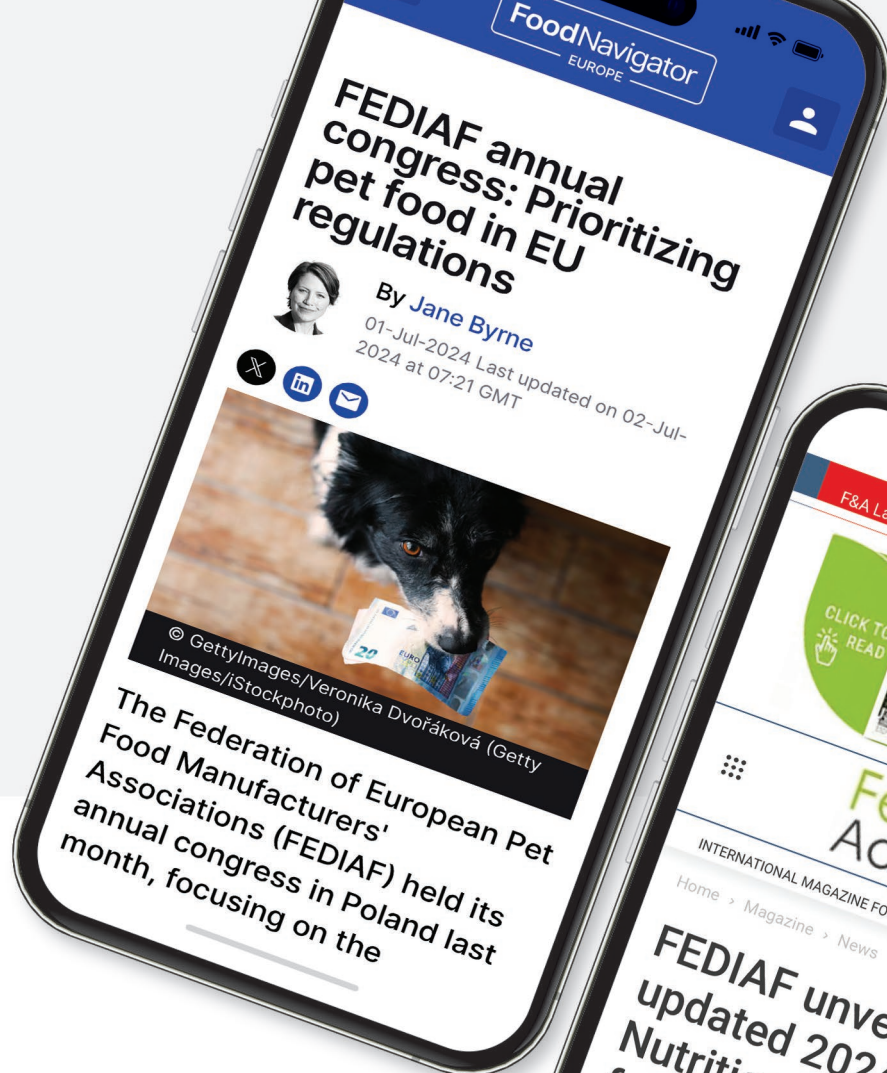
# FEDIAF – EuropeanPetFood A Snapshot of Digital and Media Activity

**11,500+**  
Linkedin followers

**3,000**

Around 3,000 new followers  
in one year (+30%)





### COVERAGE IN KEY PUBLICATIONS SUCH AS:

- PetFoodIndustry
- Feed Additive
- Feed Navigator
- Pet Food Processing
- International Pet Food
- All About Feed

# The Pet Food Industry 2023/24 Key Working Group Milestones

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FEDIAF is one voice working on behalf of the Pet Food Industry across Europe and has many achievements, which are possible due to the collaboration of its members. Here we highlight a few of these 'milestones' by Working Group:



## **ADDITIVES AND UNDESIRABLE SUBSTANCES WORKING GROUP**

FEDIAF successfully submitted an application for the authorisation of Xanthan gum in cats and supported submissions for Guar and Acacia gums. Significant progress was made on the Locust bean gum dossier, which required tolerance studies. FEDIAF continues to engage with applicants on several other feed additive dossiers.

In 2024, FEDIAF focused on addressing a major obstacle to the re-authorisation of certain hydrocolloids due to the lack of scientifically valid methods for detecting and quantifying them in finished products.



## **NUTRITION WORKING GROUP**

FEDIAF and FEDIAF's Scientific Advisory Board held two highly successful in-person meetings in 2024. These meetings provide industry and FEDIAF's independent nutrition experts a unique opportunity to meet and exchange on the most up-to-date science in the field of cat and dog nutrition. The FEDIAF Nutritional Guidelines were also updated and launched in September 2024.

In 2024, FEDIAF also had a great opportunity to work as a EFSA stakeholder providing our expertise on the update of their dietary model for cats and dogs (last published in 2011). EFSA's opinion on the dietary model was published here: <https://www.efsa.europa.eu/en/efsajournal/pub/8858>





### **ANALYTICAL SCIENCE WORKING GROUP**

The Analytical Methods Working Group has been actively driving industry recommendations on the development of analytical methods and is in the final stages of developing a gold standard method for measuring inorganic phosphorus in pet food.



### **PRODUCT COMMUNICATION WORKING GROUP**

The group is currently finalizing two new chapters of the FEDIAF Code of Good Labelling Practice for Pet Food. Additionally, members are preparing FEDIAF positions on current regulatory issues on a rolling basis.



### **ENVIRONMENTAL SUSTAINABILITY WORKING GROUP**

The group focused on the Packaging and Packaging Waste Regulation (PPWR) proposal, the Green Claims Directive (GC Directive) proposal, and oversaw the update of the Product Environmental Footprint Category Rules (PEFCR), endorsed by the European Commission in February 2025. The group also has oversight on FEDIAF's Task Force on Category 3 Animal Fat by-products.



### **FEED MATERIAL AND TRADE WORKING GROUP**

Throughout 2024, the group was actively involved in the EU Feed Chain Task Force's work to update the Feed Material Catalogue and clean the Feed Material Register. It also took part in discussions on making feed materials more circular through the Circular Feed Platform forum. FEDIAF strengthened its collaboration with DG TRADE and FoodDrinkEurope to monitor Free Trade Agreement negotiations with third countries and identify ways to improve cross-border trade.



### **SMALL PETS WORKING GROUP**

The Small Pets Working Group has recently finalized and published their Nutritional Guidelines for Feeding Pet Rabbits. These guides will be expanded in 2025 to include ornamental fish, guinea pigs and, later, pet birds.



### **COMMUNICATIONS WORKING GROUP**

The Communications Working Group led the promotion of the FEDIAF manifesto, outlining the Industry's priorities and asks, with policymakers and stakeholders, while continuing to support other Working Groups in their strategic communication efforts. We also continued to lead internal discussions around a range of sensitive topics, such as Ultra processed foods, and laid the foundations for the development of a comprehensive public affairs and communications strategy. Finally, we continued our work with the Pet Alliance to promote #PetPower.

# A. Additives and Undesirable Substances Working Group

## INTRODUCTION

### Industry Expertise and Challenges

The team consists of industry experts on legislation governing feed additives and undesirable substances, with additional expertise in key areas such as chemistry, toxicology, safety testing, and business strategy. The challenges faced by the group are dynamic and have a significant impact on our industry, requiring strong commitment and excellent teamwork from members and the Secretariat throughout the year.

### Importance of Additives

Additives play a crucial role in providing safe, stable and nutritionally balanced diets to pets across Europe. They also help ensure high levels of pet and owner acceptance in terms of flavour, texture and appearance – key factors that enable the European pet food business to thrive.

Only additives that have undergone the EU's strict authorisation, reauthorisation, or renewal processes are permitted for use. The Working Group continuously engages with the European Commission, the European Food Safety Authority (EFSA), and industry partners, including other trade associations, to ensure key ingredients are thoroughly assessed with the best available scientific evidence.

### Managing Undesirable Substances

Similarly, Undesirable Substances are a constant threat in a world where ingredients are increasingly sourced globally. FEDIAF, in association with the EU Commission are constantly vigilant to emerging legislative change. We work to understand the impact and respond on behalf of the EU pet food industry.

## OBJECTIVES

- Ensure the safety and effectiveness of ingredients used in pet food.
- Maintain access to essential nutritional, sensory and technological feed additives to support excellence in safe and balanced nutrition.
- Facilitate innovation by ensuring feed additives remain available through authorisation or reauthorisation by European authorities.

## ACHIEVEMENTS

### Feed Additives

FEDIAF successfully collaborated across the industry and with external applicants to make significant progress towards authorisation of important feed additives:

- An application for the authorisation of Xanthan gum for use in cats was submitted in mid- 2024 and is currently under assessment.
- Tolerance studies in cats and dogs were conducted to support the applicant in the re-authorisation process of Guar gum, with submission in August 2024.
- Efficacy studies for Acacia gum as a texture stabiliser were performed to support the applicant.
- A feasibility assessment for developing analytical methods to detect and quantify certain hydrocolloids was prepared by Analytical Working Group and Additives Working Group experts.
- Preparatory actions were undertaken for the tolerance studies required for the Locust bean gum dossier, with the first tests launched at the end of 2024.

### Undesirable Substances

- The group engaged with DG SANTE in a targeted stakeholder consultation on the new draft Commission Recommendation on the presence of deoxynivalenol, zearalenone, ochratoxin A, T-2 and HT-2 toxins and fumonisins in feed
- A FEDIAF survey in mycotoxins was launched to self-monitor against current and future guidance on maximum levels in pet food.

Collaboration is key to the Working Group's success. A broad range of members contribute expertise from their respective companies and provide access to research facilities to create test diets, evaluate product acceptance, and obtain analytical results in support of FEDIAF's goals. This interdisciplinary, cross-functional, and international collaboration has been instrumental in delivering results of which we are proud.

## B. Nutrition Working Group

### INTRODUCTION

One of FEDIAF's main objectives is to safeguard the well-being 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 (SAB) that includes independent and renowned scientists from across Europe. The SAB advises on the scientific standards of the recommended nutrient levels, which are incorporated into FEDIAF's Nutritional Guidelines.

FEDIAF updates the recommendations for nutrient levels in pet food based on the latest peer-reviewed science, in close cooperation with the SAB. 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 well-being 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, pet care professionals, and competent authorities.

### ACHIEVEMENTS

#### Updated FEDIAF Nutritional Guidelines

The FEDIAF Nutritional Guidelines for Complete and Complementary Pet Foods for Cats and Dogs were updated. FEDIAF officially launched the updated guidelines at the Annual European Society of Veterinary and Comparative Nutrition (ESVCN) meeting held in Belfast, Northern Ireland, in September 2024.

#### Recognition of FEDIAF Nutritional Guidelines by the Global Alliance Pet Food Associations (GAPFA)

"GAPFA supports the recognition of and use of the AAFCO and FEDIAF nutrition guidelines. Whether following AAFCO, FEDIAF, or an alternative set of internationally recognized, science-based nutrition guidelines, the guidelines should be considered in their entirety and used as a whole because each guideline was based on a specific set of scientific assumptions."

<sup>1</sup> Reynolds BS, Chetboul V, Elliott J, Laxalde J, Nguyen P, v I, Dorso L, Abadie J, Lefebvre HP, Bourge V. Long-term safety of dietary salt: A 5-year prospective randomized blinded and controlled study in healthy aged cats (PEANUT study). *J Vet Intern Med.* 2024 Jan-Feb;38(1):285-299. doi: 10.1111/jvim.16952. Epub 2023 Dec 12. PMID: 38084870; PMCID: PMC10800216.

#### FEDIAF Participated as a Sponsor at the ESVCN Congress in Belfast, Northern Ireland

The 28th Congress of the European Society of Veterinary and Comparative Nutrition (ESVCN) was held from September 11th to 15th, 2024, in Belfast, Northern Ireland. FEDIAF continued its annual sponsorship of this congress and was present with a booth providing hard copies of the updated 2024 Nutritional Guidelines, as well as a selection of FEDIAF factsheets for attendees. The provision of materials was well appreciated by participants. The annual ESVCN congress provides another opportunity for members of the FEDIAF NWG to meet and engage with members of the SAB, among other stakeholders.

#### Safety of Phosphorus in Cats

The FEDIAF Nutrition Working Group (NWG) is actively engaged in the scientific discussion around the high intake of inorganic phosphorus compounds (such as  $\text{NaH}_2\text{PO}_4$ ) and their effects on indicators of kidney function in cats. This collaboration includes widely recognized veterinary and pet nutrition experts from our SAB. The NWG and SAB reviewed the latest research on this topic published by Reynolds and colleagues<sup>1</sup>. This new study provides additional support for the level of inorganic phosphorus mentioned in the footnote of the Nutritional Guidelines. The paper was included in the updated FEDIAF Nutritional Guidelines published in 2024.

#### Initiation of Collaborative Work Between SAB and NWG on Creating New Pet Food Fact Sheets

SAB members, together with NWG members, have formed subgroups to work on new pet food fact sheets focused on grain-free diets, insect-based ingredients in pet food and awareness about weight management in pets.



## C. Analytical Working Group

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### INTRODUCTION

FEDIAF's mission is to facilitate the supply of safe and nutritious products. The importance of analytical methods continues to evolve due to challenges arising from changes in the regulatory landscape, external reports on contaminants or nutritional parameters, and the need for a clear assessment of method robustness and applicability in the additives re-authorization process.

The Working Group on Analytical Methods has become a reference point for all topics and questions related to analytical methods.

### OBJECTIVES

- Provide internal advice to other Working Groups.
- Promote analytical method development, verification, or standardization for the pet food industry.
- Promote transparency and reliability by developing standardized methods for analysing specific compounds in pet food.

### ACHIEVEMENTS

#### **Driving Industry Recommendations on the Development and Use of Analytical Methods**

Actively driving industry recommendations on the development and usage of analytical methods, the Analytical Science Working Group is finalizing its studies to develop a standard measure for inorganic phosphorus. The group is now also working on a roadmap for verifying the robustness of current methods to measure acrylamide in pet food, with the aim of providing a recommendation.

#### **Providing Expertise on Analytical Methods to the Industry**

One of the Group's missions is to provide internal advice to other Working Groups. A second workstream has been developed in collaboration with the Additives Working Group, focusing on analytical methods for hydrocolloids—a vital topic for both the industry and FEDIAF specifically.



## D. Product Communication Working Group

### INTRODUCTION

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

Pet food labelling has evolved significantly in recent years. What was once a simple pack with minimal information (mainly limited to mandatory declarations) has transformed into a comprehensive product communication approach. This now includes not only more content-rich packaging but also TV advertisements, complementary online information, colourful leaflets, and more.

Although pet food falls under feed regulation, it has its own specificities, which FEDIAF ensures are taken into account by EU authorities.

### OBJECTIVES

- Updating and harmonizing the FEDIAF Labelling Code by developing new chapters, clarifying labelling rules, and contributing to advocacy proposals to align with regulatory changes.
- Engaging in regulatory advocacy with EU bodies to promote simplified labelling practices within the industry.
- Addressing emerging topics, assessing their relevance for FEDIAF, and determining appropriate actions based on industry needs and regulatory developments.

### ACHIEVEMENTS

#### Code of Good Labelling Practice

The Code of Good Labelling Practice for Pet Food, endorsed by the European Commission in 2011 and 2018, is a living document that must be maintained in line with the ever-evolving legislative landscape.

The Working Group is currently finalizing two new chapters on organic pet food labelling and Feed for Particular Nutritional Purposes (PARNUTS), based on the respective EU regulations.

This updated Code, which also includes a legislative update and clarifications, will help manufacturers properly communicate their products to consumers, ensuring standardized labelling that facilitates buying decisions.

#### Providing Industry Guidance on Good Labelling Practices

In line with its commitment to advocating for good labelling practices, the Working Group has provided its expertise on emerging issues related to product communication. As part of this effort, the group has started collaborating with the Nutritional Working Group on voluntary carbohydrate labelling. Additionally, the Product Communication Working Group continuously responds to labelling-related questions from the industry.



## E. Environmental Sustainability Working Group

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### INTRODUCTION

FEDIAF's Environmental Sustainability Working Group (ESWG) has been an integral part of FEDIAF since 2019, working with decision-makers around Europe as a trusted voice on sustainability topics in the pet food sector.

In 2024, FEDIAF built upon its role as a responsible stakeholder in the EU's Green Deal debate and worked towards better regulation in packaging and packaging waste, and on the substantiation of environmental claims while continuing to work on the PEFCR for pet food.

### OBJECTIVES

- Promote the responsible use of resources from farm to bowl and minimise the sector's environmental impact whenever possible.
- Collaborate with authorities, regulators, academics, and other related stakeholders and contribute efficiently to policy shaping.
- Ensure that a favourable framework for more sustainable pet food production is adopted.

### ACHIEVEMENTS

#### Packaging legislative framework

Throughout the year, FEDIAF has continued to monitor the Packaging and Packaging Waste Regulation proposal and advocate our industry's position with MEPs and other decision-makers. We also coordinated our advocacy efforts with other stakeholders, engaging with our umbrella organization, FoodDrinkEurope, and the EU packaging chain forum.

Our advocacy played a part in removing amendments from the plenary vote that would have significantly impacted our sector regarding reuse targets due to their inconsistency with Animal by-products Regulation 142/2011, which requires that 'processed pet food must be packaged in new packaging.'

The co-legislators agreed on a joint text in 2024, leading to the publication of the PPWR in the EU Official Journal in January 2025.

As in previous years, FEDIAF remained vigilant regarding national packaging provisions that fail to comply with the EU Single Market's principles and continued advocating for harmonization in sectoral legislation

FEDIAF members are committed to achieving the objectives defined by PPWR. The European Commission's proposal presents a great opportunity to encourage harmonization across the EU, and we thank decision-making bodies for considering the interests of the 139 million pet-keeping households in the EU.

FEDIAF will continue to engage in the implementation phase of the PPWR, as significant secondary legislation is expected in the coming years, and to monitor national packaging measures closely.

#### Green Claims Directive

FEDIAF continued advocacy efforts on the Green Claims Directive in view of the trilogue negotiations between the co-legislators.

In 2023, the ESGW drafted a position paper calling for a harmonized approach to legislation and the adoption, where possible, of an accepted methodology for benchmarking and substantiating environmental claims.

FEDIAF continued its outreach and advocacy efforts toward legislators, conveying strong support for PEFCR (Product Environmental Footprint Category Rules) as the benchmark method for substantiating environmental impact claims in any sector where a PEFCR has been developed. FEDIAF contacted MEPs on the ENVI and IMCO committees in the European Parliament to recommend improvements to the proposed text and circulated our Position Paper on the Green Claims Directive, calling for robust substantiation, harmonization of rules, and limiting the proliferation of national schemes.

## Product Environmental Footprint Category Rules (PEFCR) for the pet food industry

The endorsement of the PEFCR in 2018 marked a key milestone for FEDIAF and its members. The PEFCR provides a credible, robust, and accessible methodology developed to help members assess the environmental impact of their pet food products using a harmonized approach. This allows consumers to make informed purchasing decisions by offering clear, reliable, and comparable information across products.

Continuing this work, FEDIAF established a Technical Secretariat to coordinate input from the Review Panel before submitting the final draft to the European Commission at the end of 2024. The PEFCR for Pet Food was officially approved by the European Commission in February 2025.



## Protecting Category 3 Animal Fat by-products

As part of the European Green Deal, the EU adopted even more ambitious climate goals, setting a target of a 55% reduction in greenhouse gas (GHG) emissions by 2030 and a long-term goal of net zero GHG emissions by 2050.

FEDIAF welcomes the ambitious climate package and supports the mainstreaming of renewable energy across all economic sectors. However, upon examining the potential and effective impacts of various Green Deal legislations, FEDIAF identified a serious risk for the sustainability of our industry regarding the carbonisation of transport: the use of Category 3 animal by-products (CAT 3) as biofuels. CAT 3 animal by-products are key ingredients in pet food production. FEDIAF firmly believes that food not intended for human consumption should be used in pet food first, in line with the EU's own waste hierarchy. Other types of animal by products, such as Category 1 and 2 animal fats, which do not meet the necessary standards for use in pet food due to safety reasons, are much more suitable for biofuels.

Unfortunately, failing to safeguard Category 3 animal fats from use in EU biofuels could trigger a higher carbon footprint for the pet food sector, as feedstocks with a higher environmental impact might be used to fill the gap.

In 2024 we met with key stakeholders and developed several articles, press releases, and joint statements to educate policymakers and our social media followers about the impact these legislative files might have on the pet food sector.

Efforts are being made to assist national associations in advocating for the protection of Category 3 animal fats from use in biofuels in national legislation, especially in light of the implementation of the revised Renewable Energy Directive. FEDIAF continues to engage European policymakers in anticipation of further revisions to the European legislative framework on renewable energy.

## F. Feed Material and Trade Working Group

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### INTRODUCTION

The Feed Material and Trade Working Group is made up of industry experts focusing on plant- and animal-derived raw materials, supported by expertise in trade and potential restrictions.

The rules for animal derivatives fall under the Animal By-Products Regulations, which contain over 350 pages of stringent provisions to safeguard human and animal health. These rules also establish the legal framework for sourcing safe raw materials for our industry. Every proposed amendment must be thoroughly scrutinised to ensure it remains suitable for the pet food sector.

As a group, we draw on our members' experience and insights to identify potential issues. Sometimes, a simple 'and' or 'or' in legal text can make all the difference.

### OBJECTIVES

#### Maximising Opportunities for FEDIAF Members in Marketing Their Products

- Ensure valuable feed materials remain available for use in the pet food industry.
- Establish appropriate sourcing and processing standards to protect animal and public health.
- Facilitate intra-community trade and exports to third countries.

### ACHIEVEMENTS

#### Feed Materials Catalogue

The group worked closely with the EU Feed Chain Task Force to submit the 5th amendment to the EU Catalogue of Feed Materials. The final proposal was shared with the European Commission in November. The Standing Committee on Plants, Animals, Food and Feed (SCoPAFF) is expected to review it by Q2 2025, with implementation by year-end.

### Brexit – Practical Implications & Keeping Stakeholders Engaged

The Working Group remained a key platform for sharing technical insights between members and UK Pet Food, ensuring that those trading with the UK stay informed on developments related to import conditions under the Border Target Operating Model issued by the UK government.

FEDIAF contributed to the consultation on proposals for product-level 'Not for EU' labelling requirements across Great Britain and monitored further developments.

Together with UK Pet Food, we worked to secure a fit-for-purpose timeframe for implementing rules that support trade between Great Britain and Northern Ireland.

### Cooperating with Legislators

The Working Group played a key role in facilitating communication between the industry and the European Commission on export facilitation to third countries and in addressing new constraints on imports into the EU (e.g. animal proteins from China).

This includes regular participation in the EU Market Access Working Group to ensure pet food remains a priority for regulators when opening new markets.

The group also initiated discussions with DG Trade on several WTO notifications, including those from Saudi Arabia, South Korea, and Canada.

## G. Small Pets Working Group

### INTRODUCTION

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

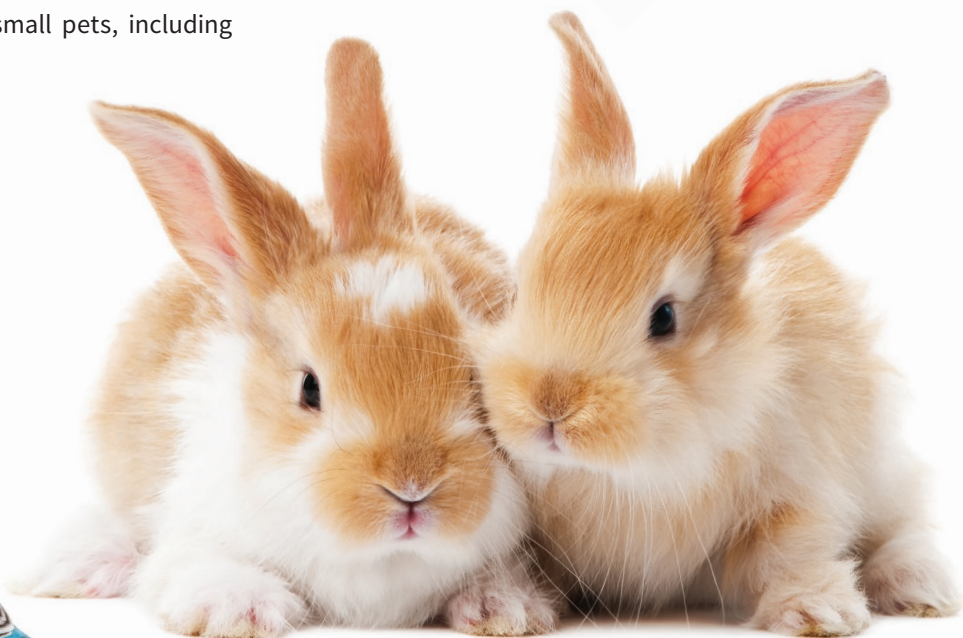
In order to give exposure to those that are smaller, FEDIAF has established a dedicated Small Pets Working Group. This Working Group addresses the interests of all companion animals apart from cats and dogs. It represents a wide range of manufacturers across the membership who cater for a large number of different species.

### OBJECTIVES

- Advocate for the interests of pets other than cats and dogs in legislative pet food matters.
- Develop nutritional guidelines for a wide range of new species including ornamental fish, pet birds, guinea pigs, and others.
- Produce educational resources for pet care professionals and pet owners.
- Provide expertise on nutrition for small pets, including exotic species.

### ACHIEVEMENTS

In 2024 the Small Pets Working Group finalized and published the Nutritional Guidelines for Feeding Pet Rabbits. Starting in 2025, these guides will be expanded to include ornamental fish, guinea pigs and, later, pet birds.



## H. Communications Working Group

### INTRODUCTION

The Communications Working Group continues to increase the visibility of FEDIAF as the responsible voice of the European pet food industry by promoting the three pillars: nutritional expertise, our sustainable credentials and the benefits of pets in society. It also collaborates to support specific Working Group activities.

We have continued to manage communications across a wide range of platforms and formats: website, events, newsletters, press releases, statements, factsheets, and our presence on LinkedIn and X.

### OBJECTIVES

- To promote FEDIAF's scientific and technical expertise.
- To share the benefits of pet interaction and ownership in addition to supporting pet welfare.
- To communicate FEDIAF's commitment to the environment and the Industry's sustainability credentials.

### ACHIEVEMENTS

#### Public presentation of the FEDIAF Manifesto and expanded stakeholder outreach

The Communications Working Group coordinated a public event to present the FEDIAF Manifesto to the public and continued to work to enhance the presence of FEDIAF in Brussels circles before and post elections. To this end, we have assisted the secretariat in developing the first stepping stones of an advocacy and communication strategy, that will enable a holistic and coordinated approach to public affairs in the future.

#### Increasing Collaboration with the Pet Alliance

Cementing the relationship with our fellow founding partner AnimalhealthEurope, and our two more recent partners FVE (Federation of Veterinarians of Europe) and FECAVA (Federation of European Companion Animal Veterinary Associations), in September 2024, we held our annual event at Townhall Europe. We welcomed over 100 guests including Members of the European Parliament, Commission and Council, animal welfare organisations, assistance animal associations and pet industry stakeholders plus many four-legged friends, to celebrate #PetPower.

We also had the privilege of hosting Marie-José Enders-Slegers, President of IAHAIO (International Association for Human-Animal Interaction Organisations), as a special guest speaker. Marie-José highlighted the essential roles that pets play in everyday life and in crisis situations around the world, with a special focus on therapy animals.

#### Continued Engagement with Stakeholders and Media on Cat 3 Campaign

FEDIAF members (as part of Cat3TF) worked collaboratively to highlight the unintended consequences of allowing the use of Cat 3, critical pet food ingredients, for biofuels. Our communications tools including factsheet and video have helped National Associations in their national efforts.

#### Supporting PPWR, Green Claims and PEFCR

We supported ESWG in the polishing of documents that promote the sustainable credentials of the Pet Food Industry.

#### Social Media, Press articles and Press Releases

Over the year, FEDIAF's followers on LinkedIn have increased by over 3000 to over 11,500 followers. Our nutritional expertise and resources are always extremely popular and well shared.

FEDIAF has contributed features and comments for articles in Pets International, International PetFood, Feed Navigator and All About Feed and Pet Food Processing. The association also circulated press releases on several topics, such as publishing new Facts & Figures report, Annual Congress, the Re-election of the board of Governors, the Publication of updated Nutritional Guidelines for Cats and Dogs, as well as for Rabbits.

#### Supporting the Animal Welfare Task Force

From its establishment at the end of 2022, the AWTF has met regularly to monitor legislative developments with the aim of influencing content affecting our industry and its objectives.

Leveraging the expertise within FEDIAF in nutrition, the Animal Welfare Task Force responded to the Commission's consultation on the proposal for a Regulation on the welfare of cats and dogs and their traceability, and prepared a position paper with suggested amendments that was circulated with the relevant stakeholders in the European Parliament. FEDIAF also reached out to the Veterinary attachés of Permanent Representations of EU Member States in Brussels to raise awareness on our position paper and highlight FEDIAF's input on Cat and Dog nutrition.

The taskforce has also continued to strengthen its relationships with pet ecosystem stakeholders, including Four Paws, Eurogroup for Animals and Animal Health Europe, to understand the different perspectives and work with regards to the EU animal welfare revision law and more.



# 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.

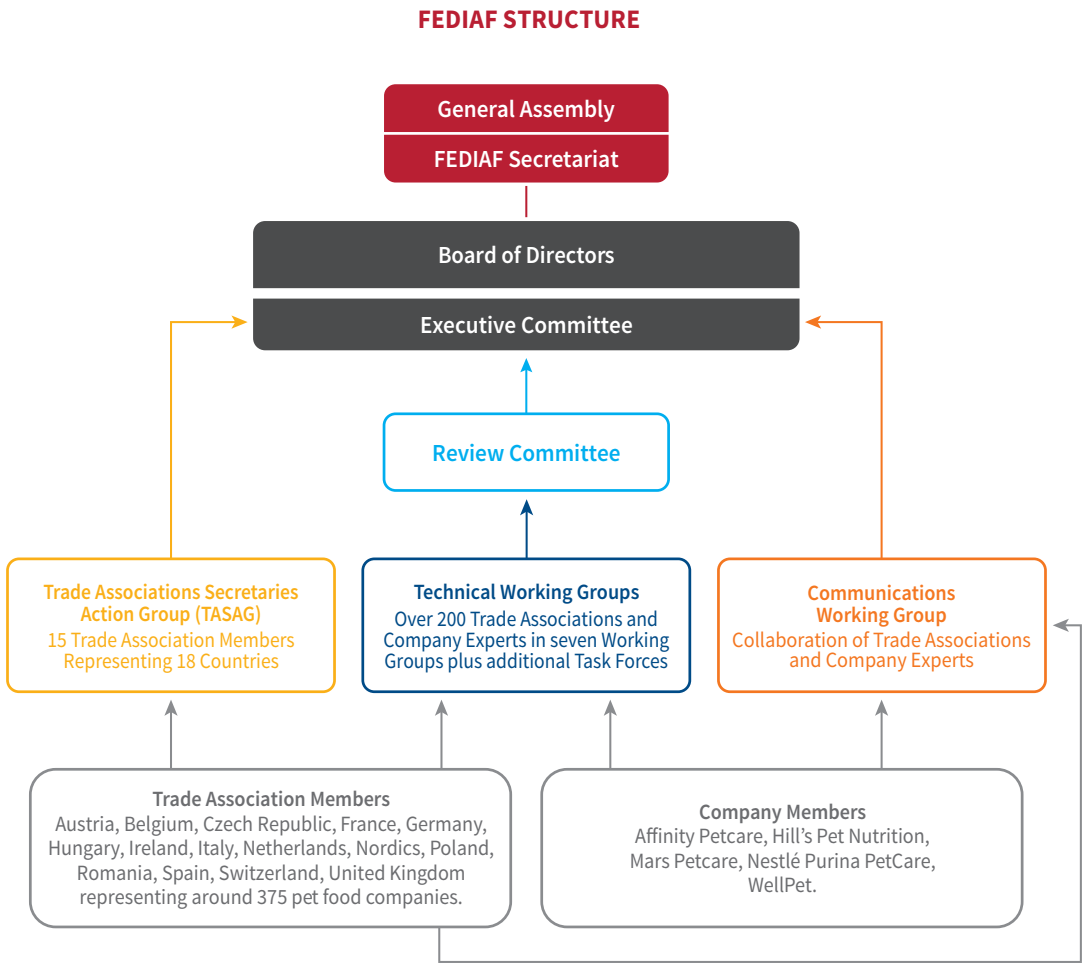
We work through a committee structure and the Secretariat works closely with the Communications Working Group and Executive Committee – reporting to the General Assembly.

The Executive Committee and the General Assembly are chaired by the FEDIAF President. The President of FEDIAF since June 2022 has been Rosa Carbonell who was re-elected in 2024.

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
- Product Communication
- Nutrition
- Analytical Science
- Feed Materials and Trade
- Environment and Sustainability
- Small Pets

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



# Committees and Working Groups Members

## EXECUTIVE COMMITTEE

Chair: Rosa Carbonell - Nestlé Purina PetCare

Vice-Chair: Christophe Carlier – FACCO

Vice-Chair: Jürgen Wigger – IVH

Treasurer: Annet Palamba – Hill's Pet Nutrition

Bernd Berghofer – ÖHTV

Bob Ter Linden - NVG

Florian Wastl – Mars Petcare

Greg Van Praagh – UK Pet Food

Ilie Gageatu - ARPAC

Izabella Balanyiné-Kurucz – FESZ

Jana Burajová – SVPDZ

Jean Grunenwald – POLKARMA

Josep Crusafont – Affinity Petcare

Kathy Heungens – BEPEFA

Lina Lopez – WellPet

Robert Kiernan – IBEC

Robin van de Bruinhorst – Q-Petfood

Sabine Mladenovic-Spiss – VHN

Simone Mezzanotte – ASSALCO

Terkel Due – NPFA

Victor Romano – ANFAAC

## OBSERVERS

Review Committee co-chairs: Karen Linley (Mars Petcare)

Monika Prenner (Nestlé-Purina)

Communication Working Group: Mindaugas Rupsys (Mars Petcare) Tisa Kosem (Nestlé-Purina)

TASAG representative: Katrin Langner (IVH)

## BOARD OF DIRECTORS

Annet Palamba – Hill's Pet Nutrition

Christophe Carlier – FACCO

Greg Van Praagh – UK Pet Food

Jürgen Wigger – IVH

Rosa Carbonell - Nestlé Purina PetCare

Victor Romano – ANFAAC

## REVIEW COMMITTEE

Review Committee co-chairs: Karen Linley (Mars Petcare)

Monika Prenner (Nestlé-Purina)

Amelie Serment - Nestlé Purina PetCare

Antonella Baggini – ASSALCO

Alfred Ogunsanya – Nestlé Purina PetCare

Astrid Schuijlenburch – Royal Canin

Donna Holland – UK Pet Food

Donna Snellgrove – Mars Petcare

Elkin Amaya – Hill's Pet Nutrition

Eva Ruiz – Royal Canin

Ilari Pesci - Royal Canin

Irina Derksen – Hill's Pet Nutrition

Isabelle Kalmar – Versele-Laga (BEPEFA)

Izabella Balanyiné – PPF Europe FESZ

Jean-Louis Paillet – Nestlé Purina PetCare

Josep Crusafont – Affinity Petcare

Kounawit Heng – Nestlé Purina PetCare

Laetitia Rouille - Nestlé Purina PetCare

Leda Touliatou - Nestlé Purina PetCare

Lina Lopez – WellPet

Lisa Conboy – Nestlé Purina PetCare

Maciej Przezdziak – POLKARMA

Matthew Elliott – Mars Petcare

Mikel Goñi – Royal Canin

Mireia Otero Garcia – Affinity Pet Care

Olena Tyshkovets – Royal Canin

Pierre Jaouen – Sopral (FACCO)

Stefano Zigiotto – Hills Petcare (ASSALCO)

Tessy Wietsma – NVG

Thomas Brenten – Saturn Petcare (IVH)

Ursula Huber – Mars Petcare (ÖHTV)

Victor Romano – Affinity (ANFAAC)

Willeke Stroucken – PPF Europe (NVG)

# Committees and Working Groups Members

## TRADE ASSOCIATIONS SECRETARIES ACTION GROUP (TASAG)

Katrin Langner – IVH
Antonella Baggini – ASSALCO
Attila Voros - FESZ
Aurélie Bynens – FACCO
Barbara Lovas-Bíró- FESZ
Benita Beekhof – NVG
Donna Holland – UK Pet Food
Elien Van Stichel – BEPEFA
Ewa Lucyk - BEPEFA
Hege Rosenhaug – Nordics
Laura Gil Martens – Nordics
Lucian Lumezeanu – ARPAC
Maciej Przeździak – POLKARMA
Magda Hrabcova– SVPDZ
Michael Bellingham – UK Pet Food
Pablo Hervas – ANFAAC
Robert Kiernan – IBEC
Santiago de Andres – ANFAAC
Søren Hempel Thomassen – Nordics
Stefan Emmenegger – VHN
Stéphanie Roux – FACCO
Tamara Rudavsky - OHTV
Terkel Due – Nordics

## COMMUNICATION WORKING GROUP

Co-Chair: Mindaugas Rupsys – Mars Petcare
Co-Chair: Tisa Kosem – Nestlé Purina
Antonella Baggini – ASSALCO
Balázs Pályi – Mars Petcare
Eva Ruiz – Royal Canin
Isabel Buil – Affinity Petcare
Laureline Malineau – Royal Canin
Nicole Paley – UK Pet Food

## SMALL PETS WORKING GROUP

Chair: Donna Snellgrove - Mars Petcare
Vice Chair: Isabelle Kalmar - Versele-Laga
Alan Gittins – Mr Johnson’s
Aleksandra Kwaśniak-Płacheta – Tropical
Andreas Thoben – Vitakraft
Barbara Venturelli – Gimborn
Christine Huggett – The Pet Food Consultant
Claire Hamblion – Supreme Petfoods
Elena Fernández Sánchez - Dibaq
Guy Werquin – Versele-Laga
Jan-Christoph Schwarze – Spectrum Brands
Marion Turnbull – Cargill
Michael Bellingham – UK Pet Food
Patrick Ghysels – Versele-Laga
Sam Marriage – WHM Pet Group
Sarah Hormozi – UK Pet Food
Tom Decock – Versele-Laga
Wojciech Rosołowski - Tropical



## ADDITIVES AND UNDESIRABLE SUBSTANCES WORKING GROUP

**Chair: Matthew Elliott – Mars Petcare**

**Vice-chair: Amelie Serment - Nestlé Purina PetCare**

Aline Hartman – PPF Europe

Angélique Perrin - Virbac

Audrey Sauthier – Nestlé Purina PetCare

Boris Ter Linden – Rondo Food

Donna Holland – UK Pet Food

Elkin Amaya – Hill's Pet Nutrition

Gert Grossheider – Gimborn

Hilke Seyffarth - Nestlé Purina PetCare

Irina Derksen – Hill's Pet Nutrition

Jerome Naar – Royal Canin

Marina Stoeckel – Saturn Petcare

Marta Vendrell – Affinity Petcare

Martin Kaczara – Hill's Pet Nutrition

Martin van Bohemen – Hill's Pet Nutrition

Michael Alvermann – Deutche-tiernahrung

Pierre Jaouen – Sopral

Robert Suarez – Royal Canin

Stephanie Roux - FACCO

Sylvia Funk – Mars Petcare

Ursula Huber – Mars Petcare

Victor Romano – Affinity Petcare

Vincent Miazza - Nestlé Purina PetCare

## NUTRITION WORKING GROUP

**Chair: Lisa Conboy-Schmidt – Nestlé Purina PetCare**

**Vice-chair: Thomas Brenten - Saturn PetCare**

Alexander Torba – Hill's Pet Nutrition

Andrew Miller – Premier Nutrition

Becky Mullis - Hill's Pet Nutrition

Britta Lammers – Mars Petcare

Carlijn Degroot – Premium Pet Food

Catherine Bogaert – Teract

Christina Germain - Nestlé Purina PetCare

Christine Jensen – Food Family

Elkin Amaya – Hill's Pet Nutrition

Emmanuelle Apper – Affinity Petcare

Francis Pastoor – Dechra

Isabelle Jeusette – Affinity Petcare

Iveta Becvarova – Hill's Pet Nutrition

Jean-Cristophe Bouthegourd – Nestlé Purina PetCare

Libby Sheridan – Nestlé Purina PetCare

Lucia Rettenbeck – Interquell

Mikel Goñi – Royal Canin

Mikki Koot – Edgard & Cooper

Petra Hellweg – Mars Petcare

Richard Butterwick – Mars Petcare

Sarah Hormozi – UK Pet Food

Stine Gregersen Vhile Felleskjøpet Fôrutvikling AS

## ANALYTICAL SCIENCE WORKING GROUP

**Chair: Mikel Goñi – Royal Canin**

**Vice Chair: Jean-Louis Paillot – Nestlé Purina PetCare**

Aleksandr Baranov – Mars Petcare

Colin Costin – Mars Petcare

Cynthia Joly – Nestlé Purina PetCare

Estelle Laurent – Nestlé Purina PetCare

Paul Stoeber – Nestlé Purina PetCare

Tobias Gorniak – Fihumin

# Committees and Working Groups Members

## FEED MATERIALS AND TRADE WORKING GROUP

**Chair:** Kounawit Heng – Nestlé Purina PetCare

**Vice-Chair:** Ursula Huber – Mars Petcare

Alfred Schlosser – Nestlé Purina PetCare

Anais Salgarolo - Virbac

Andreas Thoben – Vitakraft

Aurélie Bynens – FACCO

Balázs Pályi – Mars Petcare

Barbara Rondo Brovetto – Nestlé Purina PetCare

Cathy Sabatier – Royal Canin

David Van Belle – Wellpet

Donna Holland – UK Pet Food

Elkin Amaya – Hill's Pet Nutrition

Ignacio Conde – Affinity Petcare

Irina Derksen – Hill's Pet Nutrition

Kristel Wolfs – Wellpet

Lina Lopez – WellPet

Marta Vendrell – Affinity Petcare

Martina Gerndt – Mars Petcare

Martin van Bohemen – Hill's Pet Nutrition

Mindaugas Rupsys – Mars Petcare

Nele Koch – Saturn Petcare

Petra Neirurerova – Hill's Pet Nutrition

Robert Kiernan - IBEC

Roland Moore – Mars Petcare

Sabine Mladenovic-Spiss – Ospelt

Silke Santana – Nestlé Purina PetCare

Sofia Smejia – Wellpet

Stephane Peeters – Spectrum

Stéphanie Roux – FACCO

Tereza Fischerova – Hill's Pet Nutrition

## PRODUCT COMMUNICATIONS WORKING GROUP

**Chair:** Victor Romano – Affinity Petcare

**Vice-Chair:** Ilaria Pesci – Royal Canin

Alexander Torba – Hill's Pet Nutrition

Anais Salgarolo - Virbac

Andreas Thoben – Vitakraft

Anna Thomaidou – C&D Foods

Aurélie Bynens – FACCO

Aurelien Goliard – Nestlé Purina PetCare

Balázs Pályi – Mars Petcare

Cristina Martin – Purina Nestlé PetCare

Donna Holland – UK Pet Food

Dr Luisa Vierbaum – Saturn Petcare

Elkin Amaya – Hill's Pet Nutrition

Florence Weibel - Nestlé Purina PetCare

Franziska Zorn – Saturn Petcare

Frauke Sagebiel - Vitakraft

Henning Beckmann – IVH

Irina Derksen – Hill's Pet Nutrition

Karin Vincent – Royal Canin

Klaus Tesch – Saturn Petcare

Margaux Maeterlinck – Edgard Cooper

Maria Luisa Valentini – Nestlé Purina PetCare

Marina Stoeckel – Saturn Petcare

Martin Kaczara – Hills Petcare

Michael Alvermann – Deutsche Tiernahrung

Monika Prenner - Nestlé Purina PetCare

Olena Tyshkova – Royal Canin

Pierre Jaouen – Sopral

Stéphane Peeters – Spectrum Brands

Sylvia Funk – Mars Petcare

Tom Decock – Versele-Laga

Tommaso Mechelli – Affinity Petcare

Wesna van Deursen – AFB International

Willeke Stroucken – PPF Europe

Victor Romano – Affinity Petcare

## ENVIRONMENTAL SUSTAINABILITY WORKING GROUP

**Chair:** Eva Ruiz – Royal Canin

**Vice-Chair:** Laetitia Rouillé – Nestlé Purina PetCare

Anne-Sophie Masquelin – Virbac

Balázs Pályi – Mars Petcare

Cedric Moulin – Nestlé Purina PetCare

Cristina Martin – Nestlé Purina PetCare

Christian Schunemann – IVH

Claire Robinson-Davies - Nestlé Purina PetCare

Daniela Peloponese – Hill's Pet Nutrition

Elkin Amaya - Hill's Pet Nutrition

Eren Acar – United Pet Food

Helena Skinn – Mars Petcare

Izabella Balanyiné – PPF Europe

Lisa Conboy – Nestlé Purina PetCare

Luis Diaz – Affinity Petcare

Mireia Otero Garcia – Affinity Petcare

Nicole Paley – UK Pet Food

Paul van der Raad – Protix

Sandra Meisel - IVH

Stéphanie Roux – FACCO

Suzanne van den Eshof – Protix



## The FEDIAF Secretariat Team

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**ROSA CARBONELL**  
PRESIDENT (2022 – PRESENT)

Rosa Carbonell holds a Veterinary Degree University Autònoma of Barcelona (UAB) and an MBA. In 2005, she also pursued a Managing Development Program (PDD) at IESE Business School. She has been working at Nestlé Purina PetCare since 2003 and is Head of B2B M & Veterinary Affairs Zone Europe. She has over 20 years of experience in the PetCare industry in pet food and pharmaceutical companies. She also has a proven track record in National Trade Associations and in the IESE Women management forum. Since June 2022 Rosa has been elected the President of FEDIAF.



**ALICE TEMPEL COSTA**  
DEPUTY SECRETARY GENERAL &  
TECHNICAL DIRECTOR (2020 – 2025)

Alice Tempel Costa is FEDIAF's Deputy Secretary General & Technical Director, responsible for the coordination of the Secretariat's Technical work, Nutrition Working Group and for the management of the Association's Statutory Bodies. She 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 ten years' experience in European Trade Associations in Brussels. Before joining FEDIAF in September 2020, she worked for, CAOBISCO, DG AGRI at the European Commission, FAO, Embrapa (The Brazilian Agricultural Research Corporation) and Wageningen University.



**ALEKSANDRA PRANDOTA**  
EU POLICY AND REGULATORY AFFAIRS  
MANAGER (2023 – PRESENT)

Aleksandra Prandota is FEDIAF's EU Policy and Regulatory Affairs Manager. She coordinates the Feed Material and Trade Working Group, as well as the association's work on Additives and Undesirable substances. Aleksandra has a PhD in Agricultural Sciences specialising in nutrition and food technology from Warsaw University of Life Sciences where she also obtained a Master's Engineer degree in Commodity Studies. Additionally, she graduated from Wageningen University with a MSc in Food Safety and a Bachelor degree in International Relations from the Warsaw School of Economics. Aleksandra has over 15 years of experience working for both public and private sectors.



**DELARA KHODADAD**  
SCIENTIFIC AND REGULATORY AFFAIRS  
OFFICER (2024 – PRESENT)

Delara Khodadad is FEDIAF's Scientific and Regulatory Affairs Officer. She is in charge of the Product Communication, Analytical Methods and Small pets Working Groups. She joined FEDIAF having completed a Traineeship at the European Commission DG RTD and gathering valuable experience in the private sector, working on Sustainability and Chemical Legislation. Delara has a Masters in Advanced International and European Studies, Applied European Policy and Governance Studies in addition to a degree in European Studies from Maastricht University.



**FRANCO GARBELOTTO**  
PUBLIC AFFAIRS AND COMMUNICATIONS  
MANAGER (2024 – PRESENT)

Franco Garbelotto is FEDIAF's Public Affairs and Communications Manager. He is responsible for the overall Public Affairs and Communication strategy of the association, and coordinates the Communications Working Group. Furthermore, he manages the Environmental Sustainability Working group. Franco holds a master's degree in international relations from the University of Bologna and his studies included a year spent at the University of Chicago. He joined FEDIAF after over ten years in leading EU affairs roles in Brussels, most recently as head of the Brussels office of the German association ABV.



**RACHEL ADDY**  
OFFICE AND EVENT OFFICER (2024 –  
PRESENT)

Rachel Addy looks after the FEDIAF Office and Events. She holds a first class degree in Events Management from Manchester Metropolitan University. Rachel comes with a wealth of international experience, having managed multiple high profile events throughout London, the US and Australia. Rachel has spent the last few years in Brussels focussing more specifically on Project and Office Management.

# FEDIAF Membership

FEDIAF has 15 members associations and five company members (Affinity Petcare, Hill's Pet Nutrition, Mars Petcare, Nestlé Purina PetCare and Wellpet), representing 18 countries.



## AUSTRIA

### öhtv

Österreichische Heimtierfuttermittel  
Vereinigung  
c/o Fachverband der Nahrungs- und  
Genussmittelindustrie  
Zaunergasse 1 – 3  
1030 Wien  
Austria  
T: +43 1 7122121 0  
E: info@oehtv.at  
www.oehtv.at



## CZECH REPUBLIC

### SVPDZ

Sdruzeni vyrobce potravy pro domaci  
zvirata  
Praha 320  
257 21 Porici nad Sazavou  
Czech Republic  
E: svpdz@svpdz.cz  
www.svpdz.cz



## FRANCE

### FACCO

Chambre syndicale des fabricants  
d'aliments pour chiens, chats, oiseaux et  
autres animaux familiers  
46, Boulevard de Magenta  
75010 Paris  
France  
T: +33 1 48 03 29 11  
E: facco@facco.fr  
www.facco.fr



## BELGIUM

### BEPEFA

Belgian Pet food Association  
Rue de l'Hôpital, 29  
1000 Bruxelles  
Belgium  
E: info@bepefa.eu  
www.bepefa.eu



## DENMARK

### Finland/Norway/Sweden NPFA

Nordic Pet Food Association  
Havnegade 39  
1058 København  
Denmark  
T: +45 33 13 92 92  
E: indsigt@mldk.org  
www.npfa.dk



## GERMANY

### IVH

Industrieverband Heimtierbedarf e.V.  
Emanuel-Leutze-Strasse 11  
40547 Duesseldorf  
Germany  
T: +49 211 59 40 74  
E: info@ivh-online.de  
www.ivh-online.de



#### HUNGARY

##### FHFI

Federation of Hungarian Food Industries  
Bécsi út 126-128  
1034 Budapest  
Hungary  
T: +36 30 197 53 88  
E: barbara.lbiro@elelmszeripar.hu  
www.elelmszeripar.hu



#### ITALY

##### ASSALCO

Associazione Nazionale tra le Imprese  
per l'Alimentazione e la Cura degli  
Animali da Compagnia  
Largo Chigi, 5  
00187 Rome  
Italy  
T: +39 06 69 20 08 98  
E: assalco@assalco.it  
www.assalco.it



#### POLAND

##### POLKARMA

Polish Pet Food Manufacturers' Association  
ul. Woronicza 31/152,  
02-640 Warszawa  
Poland  
T: +48 22 646 88 18  
E: sekretariat@polkarma.pl  
www.polkarma.pl



#### IRELAND

##### PFAI – Pet food Association of Ireland

Ibec  
84-86 Baggot Street Lower  
Dublin 2  
D02 H720  
Ireland  
T: +353 1 605 1500  
www.fooddrinkireland.ie  
www.ibec.ie



#### NETHERLANDS

##### NVG

Nederlandse Voedingsindustrie  
Gezelschapsdieren (NVG)  
Postbus 1015  
4200 CA Gorinchem  
Netherlands  
T: + 31 183 64 50 23  
F: + 31 183 62 11 61  
E: nvg@atriumgroep.nl  
www.nvg-diervoeding.nl



#### ROMANIA

##### ARPAC

Asociatia Romana a Producatorilor de  
Hrana pentru Animale de Compagnie  
Str. Stirbei Voda, 26-28  
Union International Center II  
9th Floor, sect. 1  
Bucharest  
Romania  
E: office@arpac.ro  
www.arpac.ro

# FEDIAF Membership

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## SPAIN

### ANFAAC

Asociación nacional de fabricantes de alimentos para animales de compañía  
c/ San Agustín, 15-1º derecha  
28014 MADRID  
Spain  
T: +34 91 369 21 34  
F: +34 91 369 39 67  
E: anfaac@anfaac.org  
www.anfaac.com



## UNITED KINGDOM

### UK Pet Food (The Pet Food Manufacturers' Association)

Aviation House, 125 Kingsway  
London WC2B 6NH  
United Kingdom  
T: +44 207 379 9009  
F: + 44 207 836 7409  
E: info@ukpetfood.org  
www.ukpetfood.org



### Mars Petcare

Kleine Kloosterstraat 6  
1932 Sint-Stevens-Woluwe  
Belgium  
www.mars.com



### Nestlé Purina PetCare

### Nestlé Purina PetCare Europe

Av. Nestlé 55  
1800 Vevey  
Switzerland  
www.purina.eu



Verband für Heimtiernahrung  
Société pour l'alimentation des animaux familiers

## SWITZERLAND

### VHN

Verband für Heimtiernahrung VHN  
Swiss Pet Food Association  
Thunstrasse, 82  
Postfach 1009  
CH-3000 Bern 6  
Switzerland  
T: +41 31 356 21 21  
E: info@vhn.ch  
www.vhn.ch



### Affinity Petcare

Plaça d'Europa, 54-56,  
08902 L'Hospitalet de Llobregat  
Spain  
www.affinity-petcare.com/en



### Hill's Pet Nutrition

Grabetsmattweg  
4106 Therwil  
Switzerland  
www.hillspet.com



### WellPet

### WellPet Belgium BVBA

Leonardo da Vincilaan 19  
MC Square  
1831 Machelen, Diegem  
Belgium  
www.wellnesspet.com

# European Pet Food Data: An Updated and Robust Approach

**FEDIAF's Facts & Figures are highly regarded throughout Europe and frequently referenced by authorities, stakeholders, and the media. We are delighted that the European Commission cites our pet population data during discussions, alongside numerous pet industry and veterinary colleagues.**

With this recognition comes the responsibility to ensure our approach remains robust and thorough. Last year, we undertook a comprehensive update, working with external data experts at Soulor Consulting to meticulously review both pet population and market data. This year, Soulor has continued to manage the data collection process.

As per tradition, we have liaised with all 15 of our National Association members, who have supplied local population figures and market data—where available. The participating countries are listed in the Appendix (page 47). Soulor Consulting has conducted a rigorous review, aligning data and applying additional layers of verification against previous records, inflation figures, and other relevant metrics.

It is important to note that our list of European countries has evolved. Russia is no longer included and we have incorporated a set of new countries that were previously not included to ensure that the data covers all of the European Union (EU), European Economic Area (EEA) and most of the remaining Council of Europe member states (the report now covers 41 of the 48 CoE members).

Mirroring last year's methodology, we now gather data from two years prior to publication. Therefore, in 2025, we will publish data from 2023\*. Due to changes in the countries included, we advise against making direct year-on-year comparisons.

For further insights into our methodology, detailed notes are available in the Appendix, ensuring transparency and clarity in our data collection and analysis processes.

\*No Swiss data was collected in 2023 or 2024. In 2025, a new methodology was used, and this data is included in the report and Total Europe figures. A notable change from 2022 makes its inclusion necessary.



# Facts & Figures

## European Overview 2023



TOTAL POPULATION EXCLUDING AQUARIA: 282M

### TOP PETS IN EUROPE



**CATS**  
108m



**DOGS**  
90m



**ORNAMENTAL BIRDS**  
48m



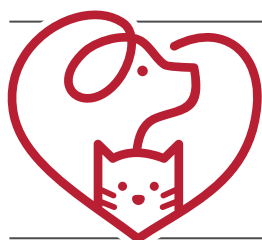
**SMALL MAMMALS**  
25m



**AQUARIA**  
18m



**TERRARIA**  
11m



**139m**  
households in Europe  
have a pet

**49%**  
of households own  
a pet

**25%**  
of households own at  
least one dog

**26%**  
of households own at  
least one cat



**29.3** TOTAL EUROPEAN VALUE (€bn)

**9.1** TOTAL EUROPEAN VOLUME (Millions Tonnes)

**9%** TOTAL EUROPEAN VALUE GROWTH

**24.6** RELATED SERVICES AND PRODUCTS  
(Accessories and Services) €bn

**9%** GROWTH IN SERVICES AND PRODUCTS



**400+** NUMBER OF PET FOOD COMPANIES

**500+** ESTIMATED NUMBER OF PLANTS

\*Russia is no longer included and we have incorporated a set of new countries that were previously not included to ensure that the data covers all of the European Union (EU), European Economic Area (EEA) and most of the remaining Council of Europe member states (the report now covers 41 of the 48 CoE members). Details are available in the Appendix.

Data sourced via FEDIAF's National Association members and aligned by Soulor Consulting. For more information on our methodology, please read the Appendix.



# Facts & Figures: European Dog Population

Albania	105,000
Austria	836,000
Belgium	2,052,000
Bosnia & Herzegovina	189,000
Bulgaria	729,000
Croatia	709,000
Cyprus	59,000
Czechia	2,229,000
Denmark	641,000
Estonia	250,000
Finland	805,000
France	7,600,000
Germany	10,500,000
Greece	652,000
Hungary	2,772,000
Iceland	26,000
Ireland	517,000
Italy	8,766,000
Kosovo	52,000
Latvia	271,000
Liechtenstein	2,000
Lithuania	614,000
Luxembourg	72,000
Malta	74,000
Montenegro	39,000
Netherlands	1,777,000
North Macedonia	86,000
Norway	500,000
Poland	8,440,000
Portugal	3,008,000
Rep. of Moldova	193,000
Romania	4,251,000
Serbia	483,000
Slovakia	909,000
Slovenia	301,000
Spain	9,463,000
Sweden	1,062,000
Switzerland	515,000
Türkiye	1,453,000
Ukraine	4,913,000
United Kingdom	11,700,000
<b>TOTAL EUROPE</b>	<b>89,615,000</b>
<b>TOTAL EU</b>	<b>69,359,000</b>

Data sourced via FEDIAF's National Association members and aligned by Soulor Consulting. For more information on our methodology, please read the Appendix.



# Facts & Figures: European Cat Population

Albania	114,000
Austria	2,019,000
Belgium	3,079,000
Bosnia & Herzegovina	206,000
Bulgaria	792,000
Croatia	419,000
Cyprus	55,000
Czechia	1,395,000
Denmark	696,000
Estonia	308,000
Finland	1,013,000
France	14,900,000
Germany	15,700,000
Greece	604,000
Hungary	2,356,000
Iceland	37,000
Ireland	371,000
Italy	10,244,000
Kosovo	57,000
Latvia	412,000
Liechtenstein	8,000
Lithuania	675,000
Luxembourg	103,000
Malta	87,000
Montenegro	43,000
Netherlands	3,000,000
North Macedonia	93,000
Norway	720,000
Poland	7,546,000
Portugal	2,073,000
Rep. of Moldova	209,000
Romania	4,432,000
Serbia	525,000
Slovakia	535,000
Slovenia	465,000
Spain	5,954,000
Sweden	1,732,000
Switzerland	1,520,000
Türkiye	4,887,000
Ukraine	7,521,000
United Kingdom	11,400,000
<b>TOTAL EUROPE</b>	<b>108,305,000</b>
<b>TOTAL EU</b>	<b>80,965,000</b>

Data sourced via FEDIAF's National Association members and aligned by Soulor Consulting. For more information on our methodology, please read the Appendix.

# Facts & Figures: European Ornamental Bird Population



Albania	6,000
Austria	128,000
Belgium	330,000
Bosnia & Herzegovina	11,000
Bulgaria	44,000
Croatia	25,000
Cyprus	87,000
Czechia	68,000
Denmark	210,000
Estonia	10,000
Finland	58,000
France	5,800,000
Germany	3,500,000
Greece	967,000
Hungary	411,000
Iceland	10,000
Ireland	96,000
Italy	12,883,000
Kosovo	3,000
Latvia	12,000
Liechtenstein	1,000
Lithuania	22,000
Luxembourg	25,000
Malta	109,000
Montenegro	2,000
Netherlands	1,408,000
North Macedonia	5,000
Norway	195,000
Poland	1,174,000
Portugal	740,000
Rep. of Moldova	12,000
Romania	296,000
Serbia	29,000
Slovakia	31,000
Slovenia	41,000
Spain	5,082,000
Sweden	314,000
Switzerland	108,000
Türkiye	11,840,000
Ukraine	773,000
United Kingdom	1,300,000
<b>TOTAL EUROPE</b>	<b>48,166,000</b>
<b>TOTAL EU</b>	<b>33,871,000</b>

Data sourced via FEDIAF's National Association members and aligned by Soulor Consulting. For more information on our methodology, please read the Appendix.



## Facts & Figures: Number of European Aquaria

Albania	10,000
Austria	252,000
Belgium	251,000
Bosnia & Herzegovina	18,000
Bulgaria	68,000
Croatia	40,000
Cyprus	8,000
Czechia	110,000
Denmark	291,000
Estonia	12,000
Finland	41,000
France	1,252,000
Germany	2,200,000
Greece	89,000
Hungary	85,000
Iceland	8,000
Ireland	28,000
Italy	1,503,000
Kosovo	5,000
Latvia	14,000
Liechtenstein	2,000
Lithuania	26,000
Luxembourg	16,000
Malta	13,000
Montenegro	4,000
Netherlands	520,000
North Macedonia	8,000
Norway	160,000
Poland	396,000
Portugal	96,000
Rep. of Moldova	18,000
Romania	152,000
Serbia	45,000
Slovakia	42,000
Slovenia	36,000
Spain	703,000
Sweden	264,000
Switzerland	217,000
Türkiye	891,000
Ukraine	444,000
United Kingdom	7,300,000
<b>TOTAL EUROPE</b>	<b>17,638,000</b>
<b>TOTAL EU</b>	<b>8,508,000</b>

Data sourced via FEDIAF's National Association members and aligned by Soulor Consulting. For more information on our methodology, please read the Appendix.



# Facts & Figures: European Small Mammal Population

Albania	8,000
Austria	500,000
Belgium	939,000
Bosnia & Herzegovina	15,000
Bulgaria	58,000
Croatia	36,000
Cyprus	37,000
Czechia	187,000
Denmark	388,000
Estonia	28,000
Finland	162,000
France	2,870,000
Germany	4,600,000
Greece	414,000
Hungary	394,000
Iceland	10,000
Ireland	169,000
Italy	1,813,000
Kosovo	4,000
Latvia	33,000
Liechtenstein	2,000
Lithuania	60,000
Luxembourg	33,000
Malta	15,000
Montenegro	3,000
Netherlands	685,000
North Macedonia	7,000
Norway	200,000
Poland	1,303,000
Portugal	252,000
Rep. of Moldova	15,000
Romania	94,000
Serbia	39,000
Slovakia	44,000
Slovenia	87,000
Spain	1,548,000
Sweden	502,000
Switzerland	408,000
Türkiye	847,000
Ukraine	886,000
United Kingdom	5,000,000
<b>TOTAL EUROPE</b>	<b>24,695,000</b>
<b>TOTAL EU</b>	<b>17,251,000</b>

Data sourced via FEDIAF's National Association members and aligned by Soulor Consulting. For more information on our methodology, please read the Appendix.

# Facts & Figures: European Terraria



Albania	2,000
Austria	129,000
Belgium	141,000
Bosnia & Herzegovina	4,000
Bulgaria	14,000
Croatia	3,000
Cyprus	1,000
Czechia	5,000
Denmark	114,000
Estonia	
Finland	30,000
France	2,100,000
Germany	1,200,000
Greece	6,000
Hungary	59,000
Iceland	6,000
Ireland	21,000
Italy	1,369,000
Kosovo	1,000
Latvia	
Liechtenstein	2,000
Lithuania	2,000
Luxembourg	9,000
Malta	12,000
Montenegro	1,000
Netherlands	154,000
North Macedonia	2,000
Norway	110,000
Poland	226,000
Portugal	45,000
Rep. of Moldova	4,000
Romania	32,000
Serbia	9,000
Slovakia	4,000
Slovenia	4,000
Spain	1,488,000
Sweden	61,000
Switzerland	204,000
Türkiye	165,000
Ukraine	890,000
United Kingdom	2,100,000
<b>TOTAL EUROPE</b>	<b>10,729,000</b>
<b>TOTAL EU</b>	<b>7,229,000</b>

Data sourced via FEDIAF's National Association members and aligned by Soulor Consulting. For more information on our methodology, please read the Appendix.

# Facts & Figures: European Population Total

Albania		245,000
Austria		3,864,000
Belgium		6,792,000
Bosnia & Herzegovina		443,000
Bulgaria		1,705,000
Croatia		1,232,000
Cyprus		247,000
Czechia		3,994,000
Denmark		2,340,000
Estonia		608,000
Finland		2,109,000
France		34,522,000
Germany		37,700,000
Greece		2,732,000
Hungary		6,077,000
Iceland		97,000
Ireland		1,202,000
Italy		36,578,000
Kosovo		122,000
Latvia		742,000
Liechtenstein		17,000
Lithuania		1,399,000
Luxembourg		258,000
Malta		310,000
Montenegro		92,000
Netherlands		7,544,000
North Macedonia		201,000
Norway		1,885,000
Poland		19,085,000
Portugal		6,214,000
Rep. of Moldova		451,000
Romania		9,257,000
Serbia		1,130,000
Slovakia		1,565,000
Slovenia		934,000
Spain		24,238,000
Sweden		3,935,000
Switzerland		2,972,000
Türkiye		20,083,000
Ukraine		15,427,000
United Kingdom		38,800,000
<b>TOTAL EUROPE</b>		<b>299,148,000</b>
<b>TOTAL EU</b>		<b>217,183,000</b>

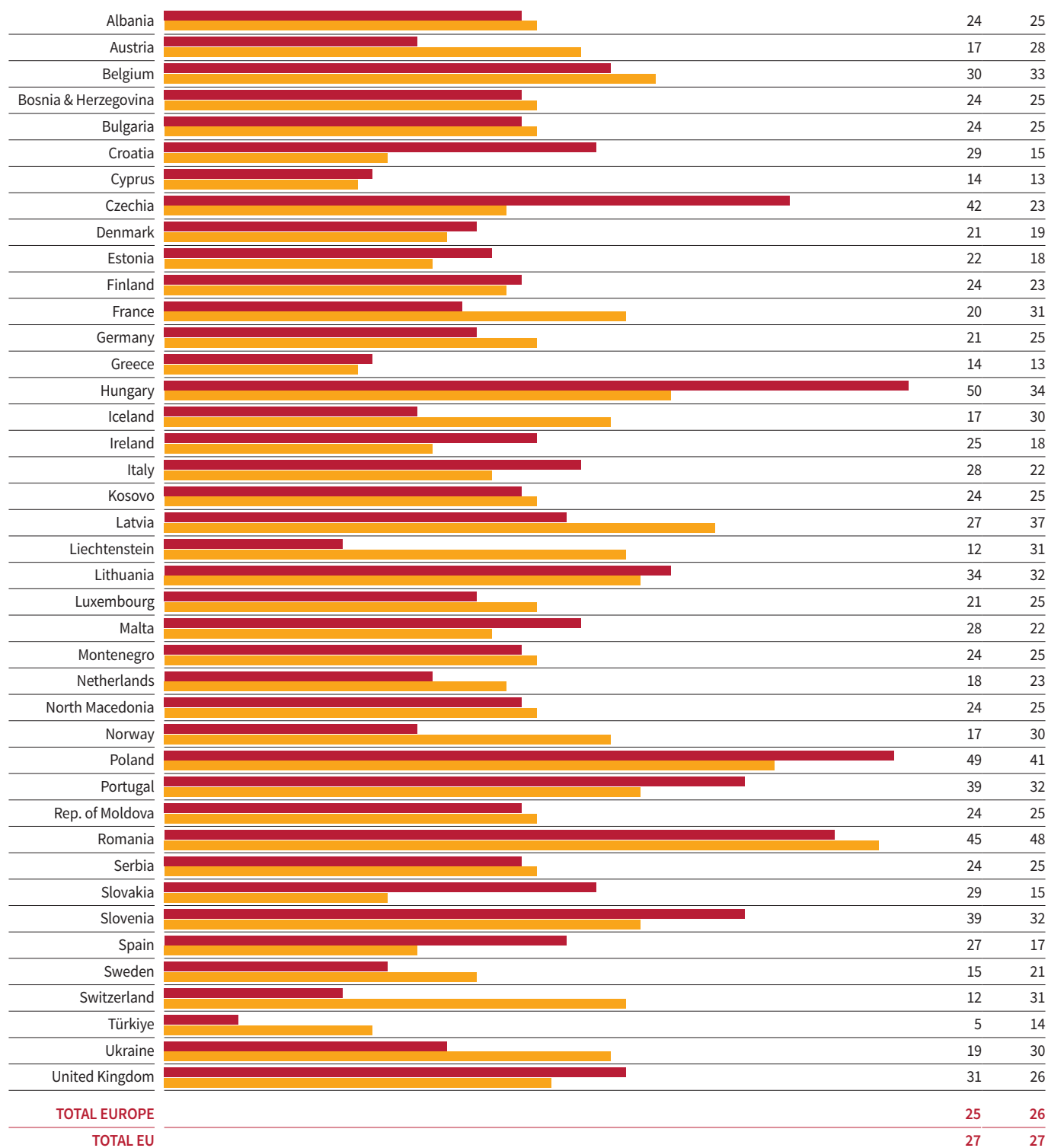
Data sourced via FEDIAF's National Association members and aligned by Soulor Consulting. For more information on our methodology, please read the Appendix.

# Facts & Figures: European Population Total Excluding Aquaria

Albania	235,000
Austria	3,612,000
Belgium	6,541,000
Bosnia & Herzegovina	425,000
Bulgaria	1,637,000
Croatia	1,192,000
Cyprus	239,000
Czechia	3,884,000
Denmark	2,049,000
Estonia	596,000
Finland	2,068,000
France	33,270,000
Germany	35,500,000
Greece	2,643,000
Hungary	5,992,000
Iceland	89,000
Ireland	1,174,000
Italy	35,075,000
Kosovo	117,000
Latvia	728,000
Liechtenstein	15,000
Lithuania	1,373,000
Luxembourg	242,000
Malta	297,000
Montenegro	88,000
Netherlands	7,024,000
North Macedonia	193,000
Norway	1,725,000
Poland	18,689,000
Portugal	6,118,000
Rep. of Moldova	433,000
Romania	9,105,000
Serbia	1,085,000
Slovakia	1,523,000
Slovenia	898,000
Spain	23,535,000
Sweden	3,671,000
Switzerland	2,755,000
Türkiye	19,192,000
Ukraine	14,983,000
United Kingdom	31,500,000
<b>TOTAL EUROPE</b>	<b>281,510,000</b>
<b>TOTAL EU</b>	<b>208,675,000</b>

Data sourced via FEDIAF's National Association members and aligned by Soulor Consulting. For more information on our methodology, please read the Appendix.

# Facts & Figures: % of European Households Owning at Least One Dog or One Cat



Data sourced via FEDIAF's National Association members and aligned by Soulor Consulting. For more information on our methodology, please read the Appendix.

# Facts & Figures: A Pet Food Format Overview

This year, we analysed the percentages of different formats produced and have some highlights in this report.



In Europe

58%

of pet food produced is for dogs



35%

of pet food produced is for cats



In Europe

47%

In value terms 47% comes from the dog sector



39%

In value terms 39% comes from the cat sector

Dog Food **Volume** Splits



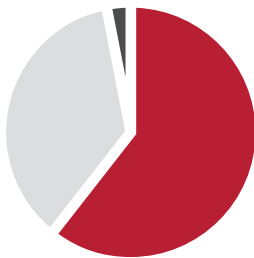
Wet Dog 30%  
Dry Dog 61%  
Treats Dog 9%

Dog Food **Value** Splits



Wet Dog 26%  
Dry Dog 50%  
Treats Dog 24%

Cat Food **Volume** Splits



Wet Cat 60%  
Dry Cat 36%  
Treats Cat 3%

Cat Food **Value** Splits



Wet Cat 60%  
Dry Cat 30%  
Treats Cat 10%

# Appendix

## FEDIAF ANNUAL POPULATION DATA METHODOLOGY 2022 ONWARDS

This year national associations provided data for 2023 (some markets cannot provide the most recent year of data in time for FEDIAF's report therefore it was decided in 2023 that the report to be published in 2024 would harmonise data for 2022) and Soulor Consulting made estimates for the other European countries based on data published by FEDIAF for 2022 using a new methodology.

Most of our national associations provide FEDIAF with aquaria as they now understand that we collect aquaria not fish. As a result, FEDIAF has not had to 'translate' fish numbers into aquaria. Where markets have not provided any data, Soulor has based figures on what was published in 2022 and the number has been aligned according to the average number of pets per household.

This year 11 additional countries have been added and one removed (added = AL, BA, CY, IS, LI, MT, ME, MK, MO, RS, XK; removed = RU). For countries where national associations provided data, this data was checked against 2022 to ensure consistency and in some cases 2022 data was published last year this data has been used again for 2023 (where NA have submitted). For countries that did not submit data, Soulor Consulting used 2022 populations and calculated these missing data using a new methodology. All final population data was rounded (growth rates are calculated using the unrounded data).

The Total Europe & EU total households owning a pet percentages are calculated from those National Associations that submitted a number for households owning a pet (total) which were FR (estimated from 2022), DE, IT, NL, ES (estimated from 2022) & GB. Those countries account for 59% of the total pet population (Total Europe, 64% for EU where GB was removed from the calculation as no long in the EU). Those calculated percentages of households owning for those five/six countries was applied to the number of total households for Total Europe and EU. This year sub totals have been added for EEA and other Council of Europe (CoE) countries.

## FEDIAF ANNUAL MARKET DATA METHODOLOGY 2022 ONWARDS

As with Population data, this year national associations were asked to provide data for 2023. Where a national association was not able to provide volume or value sales for the market, this missing data was calculated based on expected price per kilo. Where a country did not submit, the total for total pet was estimated using a new methodology. Last year national associations were asked to provide more detail than in previous years to cover, cat and dog food, split into wet, dry and treats. As there has been a change in methodology again this year as 2022 data has been reviewed with the new list of countries and missing/new countries that do not have NA submissions have been calculated by assigning each new/missing country a proxy country and modelling the total market size on that country's pet population and price per kilo and VAT rate. For countries that are estimated the 2022-2023 growth is also based on rate of consumer inflation for 2022-2023.

### LISTS OF COUNTRIES INCLUDED

- 2022 data updated to include updated list of countries as per 2023 data.
- Population & Market Data from NA data: AT, BE, CZ, **FR**, DE, HU, IT, NL, **NO**, **PL**, SK, **ES**, **CH**, UK (some data points were changed by Soulor Consulting during checking process); orange = partial submission/note; red = no submission TY.
- 2023 notes: FR population data 2022 used; ES population and market data estimated as no data available as per communication from NAs. CH is 2025 data with a new methodology.
- Population & Market Data from FEDIAF/Soulor Consulting Estimates: BG, FR (Popn.), HR, DK, EE, FI, GR, IE, LV, LT, PT, RO, SI, ES (Popn. & Mkt Data), SE, TR, UA; Removed: RU; **Added**: AL, BA, CY, IS, LI, MT, ME, MK, MO, RS, XK.
- Sales split Cat/Dog table: Limited to: AT, CZ, FR, DE, IT, SK, GB (84% of total volume submitted).

# Glossary

AGM	Annual General Meeting	FEFANA	European Union trade association of the animal feed additives industry
AMFEP	Associations of Manufacturers and Formulators of Enzyme Products	FSFS	Framework for Sustainable Food Systems
APAG	The European Oleochemical Industry	FVE	Federation of Veterinarians in Europe
AWTF	FEDIAF Animal Welfare Task Force	GAPFA	Global Alliance of Pet Food Associations
BHA	Butylated Hydroxy Anisole	GHG	Greenhouse Gas Emissions
CEFIC	The European Chemical Industry Council	IIA	Inception Impact Assessment
DG AGRI	European Commission Directorate-General for Agriculture and Rural Development	JRC	Joint Research Council
DG ENVI	European Commission Directorate-General for the Environment	LCA	Life Cycle Analysis
DG GROW	European Commission Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs	NGOs	Non-Governmental Organisations
DG IMCO	Committee on the Internal Market and Consumer Protection	NWG	Nutrition Working Group
DG SANTE	European Commission Directorate-General for Health and Food Safety	PARNUTs	Food intended for Particular Nutritional Purposes
DG TRADE	European Commission Directorate-General for Trade	PEF	Product Environmental Footprint
EC	European Commission	PEFCRs	Product Environmental Footprint Category Rules
EF	Environmental Footprint	PPWR	Packaging and Packaging Waste Regulation
EFSA	European Food Safety Authority	RASFF	Rapid Alert System for Food and Feed
ESVCN	European Society of Veterinary & Comparative Nutrition	RED	The EU Renewable Energy Directive
ESWG	Environmental Sustainability Working Group	RES	Renewable Energy Sources
EU	European Union	SAB	Scientific Advisory Board
FECAVA	Federation of European Companion Animal Veterinary Associations	SCoPAFF	Standing Committee on Plants, Animals, Food and Feed
FEDIAF	European Pet Food Industry Federation	SPS	Sanitary and Phytosanitary Measures
FEFAC	The European Feed Manufacturers' Federation	TASAG	FEDIAF Trade Associations Secretaries Action Group
		TSE	Transmissible spongiform encephalopathies
		UK	United Kingdom
		WG	Working Group

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Rue de l'Industrie 11  
box 10, B – 1000  
Brussels

[fediaf@fediaf.org](mailto:fediaf@fediaf.org)

[www.europeanpetfood.org](http://www.europeanpetfood.org)