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Annual Report 2023
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An Introduction from the FEDIAF President



It's a pleasure to reflect on my first year as president of FEDIAF, which has been filled with challenges and opportunities. It has been an honour to help guide the Pet Food industry through these waters and I am extremely proud of how we have collaborated and spoken with one voice.

GLOBAL IMPACT ON OUR SECTOR

The Pet Food Industry is one of the fastest growing sectors in Europe. We expect value growth to be around 5% and volume growth around 3.5% with value at €29.1 billion.



5%	3.5%	29.1bn
VALUE GROWTH	VOLUME GROWTH	OVERALL VALUE

However, the sector has faced severe disruption caused by geopolitical developments. Russia's war in the Ukraine has impacted energy supplies and the availability of raw materials, which have in turn affected the pet food supply chain throughout Europe. Our Industry has also witnessed the financial implications of these events. I am proud to say that we have navigated these testing waters and included pet food as an essential sector, through close collaboration with the European Commission and Member States. We also value our relationship with GAPFA, the Global Alliance of Pet Food Associations.

EUROPEAN REGULATORY CHANGE

Against this background, we have also been impacted by the unintended consequences of regulatory change, which is contributing to the shortage of key raw materials for our pets' diets. The pet food industry uses many by-products from the human food chain, which include Category 3 animal fats, and FEDIAF recognised the importance of safeguarding these essential ingredients.

Our messaging has been very clear. FEDIAF firmly believes that these by-products, which are not intended for human consumption, should be repurposed in line with the waste hierarchy, in pet food first and not biofuels. We have worked collaboratively with other organisations such as FEFAC and APAG (a sector group of Cefic), in our liaison with the European Commission and Member States to raise awareness of this issue. We need to see change – we need further protection for our Industry's key ingredients – in order to continue to provide safe and nutritious food to pets and contribute to the EU economy.



WORK TO SUPPORT OUR THREE PILLARS

Against the global backdrop and alongside these critical campaigns, FEDIAF signed the EU Code of Conduct, following the example of many other organisations, like FoodDrinkEurope. You can read our 2022 report, which outlines the many ways we have supported and contributed to the Code's aspirational objectives, where applicable to the pet food sector. FEDIAF has also maintained an excellent focus on the work within its eight Working Groups. All work is aligned with the three pillars:



Science and technical expertise enables our industry to provide safe and nutritious products for the wellbeing of pets



Pets play an important role in society providing companionship, protection and unique bonds with their owners. Our industry is committed to supporting the welfare of pets



Our industry is committed to sustainability from farm to bowl – the responsible use of resources and minimising our environmental impact wherever possible

NUTRITIOUS PRODUCTS BACKED BY SCIENCE

In addition to fighting to safeguard Category 3 animal fats and supporting our National Associations in their communications plans, our experts continue to work hard to protect other ingredients and ensure that the industry is not obstructed in the production of safe, nutritious products.

One example is that we have succeeded in securing the reauthorisation of BHA for cats, which has serious cost savings for our Industry.

FEDIAF has also worked hard to communicate the need for different labelling rules for organic pet food and on the requirement for some additives to produce organic pet food. We are really pleased to see that the Regulation 2023/121 was published and includes most of the substances considered as essentials by the WG to produce organic pet food.

THE ROLE OF PETS IN SOCIETY AND THEIR WELFARE

FEDIAF also recognises its commitment to the broader topics of animal welfare and responsible ownership. Last year, we established our Animal Welfare Task Force and are also continuing our excellent collaboration with

AnimalhealthEurope in establishing the Pet Alliance. I was honoured to welcome EC officials, MEPs and EP staff, journalists, trade associations, NGOs and welfare charities to our event at the Residence Palace last year. Our website and social media help to communicate the many benefits of pet interaction.

SUSTAINABILITY FROM FARM TO BOWL

Our Environmental and Sustainability Working Group of experts has been working hard on many levels. Firstly, we have been monitoring the development of the packaging and packaging waste regulation proposal. Here we have been very active internally, aligning how the proposal will impact the industry and communicating our views from the beginning. We also continue to communicate the importance of the Product Environmental Footprint (PEF) methodology for the petfood sector, especially in the context of discussion on green claims. Since 2018, we have worked with the European Commission to develop the PEF Category Rules (PEFCRs). We are currently collaborating with many other sectors including Brewers of Europe, COTANCE, FEFAC and The European Dairy Association to reiterate our support for a harmonized legislative framework based on the PEF method.

THANK YOU TO THE SECRETARIAT AND WORKING GROUPS

Another focus of my first year has been to support the Secretariat with team changes. Alice Tempel Costa has stepped up to the role of Deputy Secretary General and has worked incredibly hard to support our members in an extremely busy year. Alice has been ably assisted by Katerina Alexopoulou who is our Junior Scientific and Regulatory Affairs Policy Advisor.

I am truly grateful to our trade associations and members for their efforts and expertise. Everyone has been working hard to shape the organization for the future and I look forward to working alongside the team during my second year. Our Annual Report provides an excellent overview of the breadth of FEDIAF's work within its Working Groups, committees and task forces.

We encourage you to consider joining a group next year and lending your expertise to the collaboration of our members, which enables us to supply safe and nutritious pet food to the 340 million pets in the EU. Thank you for your continued support. By working collaboratively with a united voice, we can continue to work successfully towards common goals.

Rosa Carbonell
President, FEDIAF

A Message from the FEDIAF Deputy Secretary General



As Rosa has discussed, a key focus for FEDIAF in 2022 and 2023 has been the need to protect ingredients – in particular Category 3 animal fats. Experts from various working groups (Environmental Sustainability, Feed Materials, Nutrition and Communications) have worked together to communicate the significance of these ingredients for the industry.

We also prepared a toolkit and organised a workshop for national associations to support their activities at national level. Please check our website for further information as we have released a video and factsheet on the topic.

It has been excellent to work with APAG and FEFAC over the last year and we are grateful for their collaboration and fruitful exchanges on the Cat 3 files. I believe these collaborations enabled us to overcome challenges and make the most progress.

We are delighted to release this annual report at our 2023 Statutory Annual General Assembly of FEDIAF (21 June 2023). It has been a very busy year for the Secretariat and we are extremely grateful for the support of our members and working groups who have collaborated and achieved so much!

This report includes our highlights or milestones from each working group. Over 200 members are involved and we encourage new members to join the different Working Groups/Task Forces that we have. In addition to supporting us with your expertise, it is a fantastic opportunity to collaborate with colleagues and ultimately shape the future of the pet food industry.

I would also like to take this opportunity to thank AnimalhealthEurope for their work as co founders of the Pet Alliance Europe. Our work with them – and the event – is a fantastic way of communicating #PetPower – the huge benefits of the human-pet bond.

Finally, thank you again to the FEDIAF President, the Board of Directors, chairs and vice chairs for the willingness to go the extra mile to support the Secretariat and for your collaborative spirit and by extension, thank you to all members, for your dedication and support.

Alice Tempel Costa
Deputy Secretary General, FEDIAF



EuropeanPetFood



FEDIAF – EuropeanPetFood A Snapshot of Industry Numbers



EuropeanPetFood

1970

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



18

We're represented in 18 countries



15

Member states



05

Member companies



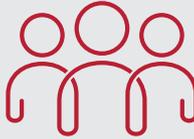
150+

Promoting the views of over 150 pet food companies throughout Europe



95%

We represent 95% of the industry



200+

We have over 200 Members involved in Working Groups



340

Feeding over 340m pets!

FEDIAF – EuropeanPetFood A Snapshot of FEDIAF Activities



8

Working Groups

70+

Internal Committee and Taskforce Meetings

130+

Attendees at Annual Congress 2022

50+

Meetings with external stakeholders

7

Secretariat participating as guest speakers at external events

100+

Guests attended PetPower event

20+

Articles and positions published

FEDIAF – EuropeanPetFood A Snapshot of Digital & Media Activity

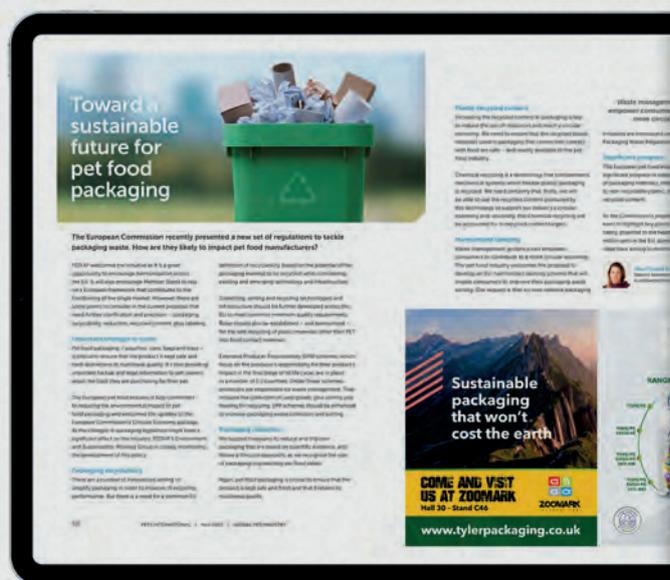


6500+

LinkedIn followers

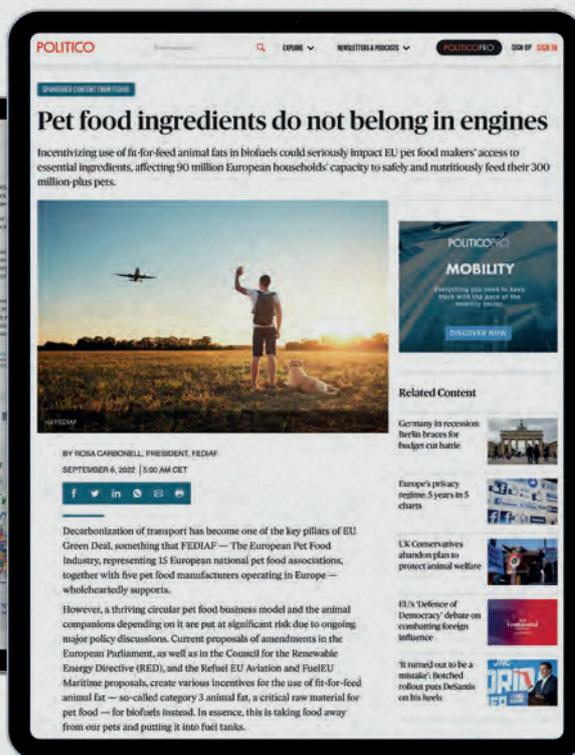
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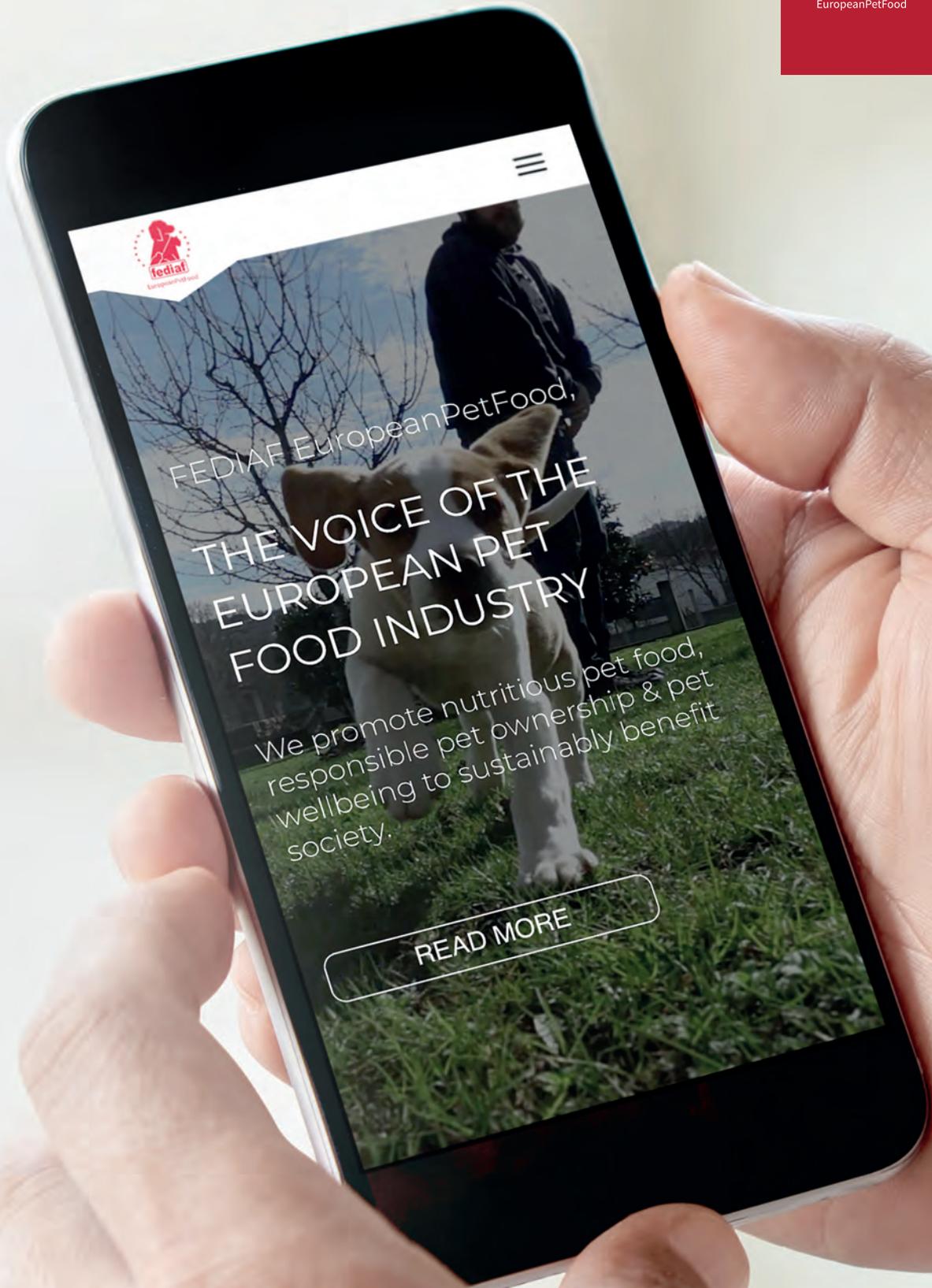
New followers in one year (+80%)



Coverage in key publications such as:

- Politico
- Euractiv
- FeedNavigator
- Pets International
- EsppeciesPRO





The Pet Food Industry 2022/23

Key Milestones

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’:

ADDITIVES & UNDESIRABLE SUBSTANCES WORKING GROUP

FEDIAF successfully secured the reauthorization of BHA for cats in the EU, saving the industry an estimated 100M euro. It also completed a tolerance study for Propyl gallate to enable future reauthorisation.

NUTRITION WORKING GROUP

Engagement with FEDIAF’s Scientific Advisory Board and discussion around the high intake of inorganic phosphorus compounds (such as NaH_2PO_4) and effects on indicators of kidney function in cats resulting in Prof. Jonathan Elliott’s paper being added to list of references in FEDIAF’s Nutritional Guidelines.

ANALYTICAL SCIENCE WORKING GROUP

The group supported the Nutrition Working Group by providing expertise on an analytical method to measure inorganic phosphorus developed by the University of Munich, in addition to advising on carbohydrate labelling workstream.

PRODUCT COMMUNICATION

FEDIAF successfully communicated that different labelling rules were required for organic pet food. Regarding the substances for use in organic production, Reg 2023/121 has been published, thus allowing the use of most of the substances considered as essentials for the organic pet food production.

ENVIRONMENTAL SUSTAINABILITY WORKING GROUP

The group submitted its first annual report following the signing of the Code of Conduct for Responsible Business Practice. The group also focused on the packaging and packaging waste regulation proposal, prepared for the PEFCR update and monitored the green claims directive proposal closely.

FEED MATERIALS AND TRADE

The group monitored the developments and highlighted opportunities for improving cross border trade. FEDIAF presented the positions of the WG to the European Commission, DG TRADE and stakeholders such as FoodDrinkEurope. The group also monitored the legislative files impacting feed materials such as Category 3 animal fats.



SMALL PETS

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

COMMUNICATIONS

FEDIAF coordinated a campaign to protect Category 3 animal fats with articles in Politico and Euractiv plus increased engagement on social media with our LinkedIn page doubling in one year to over 6500 followers. We also hosted the Pet Alliance's first 'live' event at the Residence Palace in Brussels and established an Animal Welfare Task Force.



A. Additives and Undesirable Substances Working Group

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, safety testing and business understanding. The challenges the group face are dynamic and high impact for our industry, requiring a strong commitment from members and secretariat throughout the year.

Additives are an essential component in offering safe, stable and nutritionally balanced diet to pets across Europe. They are also key to ensuring products achieve the high levels of pet and owner acceptance in terms of flavour, texture and appearance that enables the European pet food business to thrive.

Only additives that have adhered to the strict authorisation/ reauthorisation / renewal 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 thoroughly assessed with the best possible body of evidence.

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 legislative change. We work to understand the impact and respond on behalf of the EU pet food 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 2022

Additives: successful collaboration across the industry

- BHA reauthorisation secured for cats in EU saving the industry an estimate 100M euro.
- Tolerance study complete for Propyl gallate to enable future reauthorisation.
- Applicant engagement ensures clear route to reauthorisation for multiple additives (gelling agents and BHT).

Collaboration is key in the working group, with a broad range of members offering the expertise of their respective companies and access to their research facilities to create test diets and analytical results to support the goals of FEDIAF. It is the development of this interdisciplinary, cross-functional and international collaboration that has delivered the results of which we are proud.



B. Nutrition Working Group

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

ACHIEVEMENTS

Safety of Phosphorus in cats

The FEDIAF Nutrition Working group (NWG) is actively engaged in the scientific discussion around high intake of inorganic phosphorus compounds (such as NaH_2PO_4) and affects on indicators of kidney function in cats in collaboration with broadly recognized vet and pet nutrition experts in the field. Lately Prof. Jonathan Elliott was invited to the mid-year SAB meeting to discuss his publication regarding phosphorus homeostasis and its impact on renal health. The evidence provided supports the level of inorganic Phosphorus mentioned in the footnote in the Nutritional Guidelines. The paper will be added to list of references.

FEDIAF participated as basic sponsor at the ESVCN congress in Basel, Switzerland

The 26th Congress of the European Society of Veterinary and Comparative Nutrition (ESVCN) Congress was a physical conference in September 2022 in Basel. FEDIAF was present with a booth and provided hard copies of the Nutritional Guidelines, as well as the Labelling Guide, and a selection of FEDIAF factsheets for attendees. The provision of materials was well appreciated by participants.

Initiation of collaborative work between SAB and NWG on create new pet food fact sheets

SAB members together with NWG members have formed small working groups to work on new pet food fact sheets in the area of grain-free diets, insect based ingredients in pet food and the awareness about obesity incidence, risk factors and the need for weight management.



C. Analytical Science Working Group

INTRODUCTION

FEDIAF's mission is to facilitate the supply of safe and nutritious products. The Working group on Analytical science continues to be a reference point for all topics and questions related to analytical methods. Additional members were brought in significantly contributing to the expertise and resources in the group.

The Analytical Science Working Group has become established as a reference point for all topics and questions related to analytical methods. Since its creation, the importance of analytical methods has continued to evolve.

OBJECTIVES

- To provide internal advice to other Working Groups.
- To provide advice to other Trade Associations.

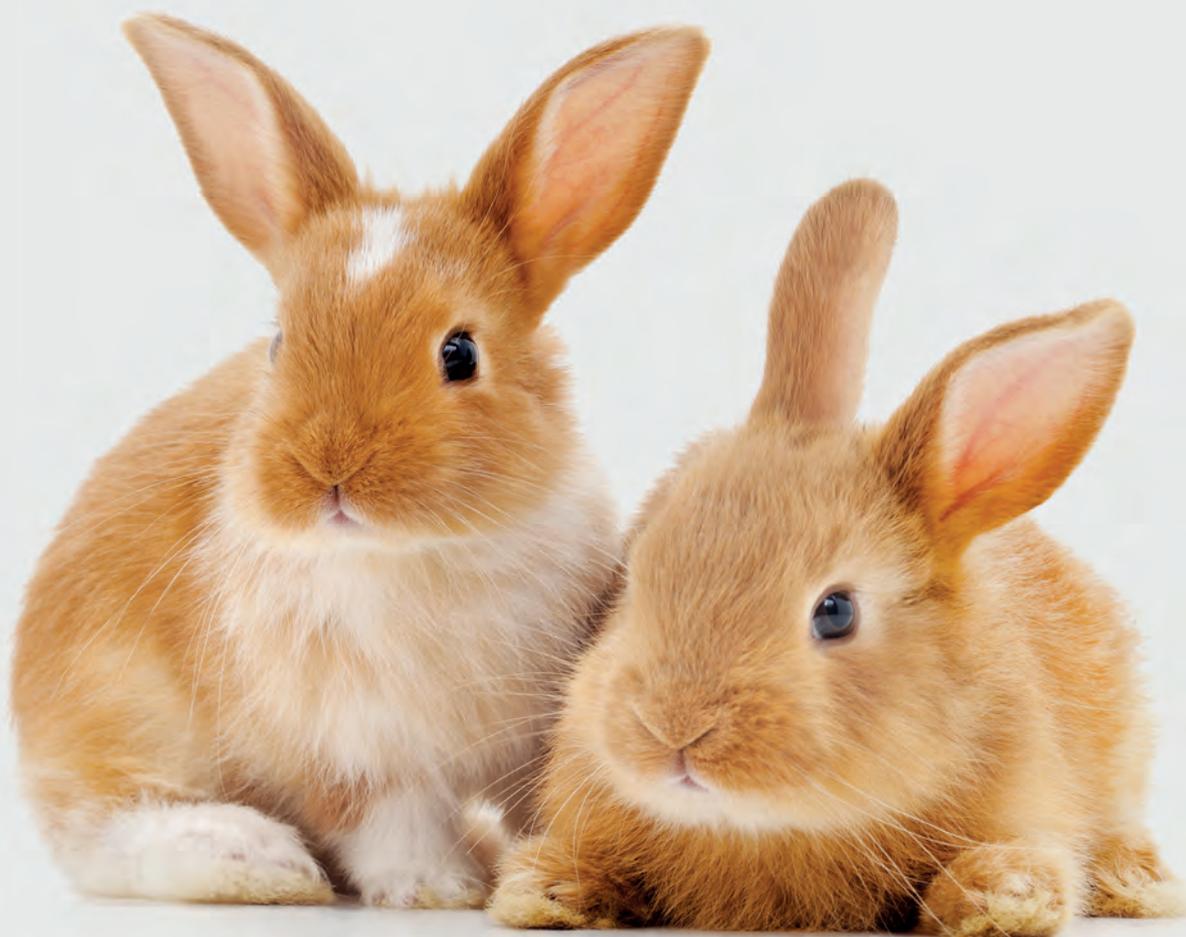
ACHIEVEMENTS

Providing expertise on analytical methods to measure inorganic Phosphorus & Carbohydrates

From the Nutritional working group, the group received the request to provide expertise on an analytical method to measure inorganic phosphorus developed by the University of Munich. Furthermore, the members provided an overview of available analytical methods for the different carbohydrates as part of the carbohydrate labelling workstream in the Nutritional working group.

Driving Industry recommendations on the use of analytical methods

The Analytical Science Working Group actively drives industry recommendations on the development and usage of analytical methods, and in this area the group is working on a roadmap for developing a gold standard method to measure acrylamide in pet food.



D. Product Communication Working Group

INTRODUCTION

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

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

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

OBJECTIVES

Organic Regulation

FEDIAF identified two issues, which could cause a clear disruption of the EU organic business:

- Essential additives: the current list of EU additives authorised for organic feed did not include some key additives, which are essential for the manufacturing of safe pet foods.
- Organic feed labelling rules do not fit to the pet food specificities: as most pet foods are complete (i.e. all nutrients need to be included into the product) the organic feed rules would make it almost impossible to label organic pet foods, thus adapted specific rules for pet food would be needed.

To tackle both issues, FEDIAF created 'the organic TF' and worked hard with our TASAG members, Nutrition WG and the European Commission.

ACHIEVEMENTS

Organic Regulation

Regarding the authorisation of essential additives, the working group prepared a dossier for each key additive, to justify its need. Reg 2023/121 has been published, and now includes most of these additives, which means members will be able to continue manufacturing both dry and wet safe organic products.

Regarding the labelling rules for pet food, although the new organic regulation clearly defines pet food as feed, the European Commission and Member States have understood that the purpose of feed for farm animals (productivity) is not the same as for pet food and the completeness of pet foods. For this reason, specific rules will be adopted, which will take into consideration the pet food specificities.

Code of Good Labelling Practice

The Code, endorsed by the EC, is a living document and needs to be maintained. The ongoing work includes the update of the legal references, the modification of legal terms and clarification of some terms. New chapters are going to be added/enhanced, including new regulatory rules for organic pet food (after Regulation 2018/848 and the specific labelling rules for pet food) and the update of the PARNUTS chapter, which needs to be modified after Regulation 2020/354. The maintenance helps manufacturers to properly communicate their products to consumers and consumers will have a standardise labelling which will ease their buying decision.



E. Environmental Sustainability Working Group

INTRODUCTION

FEDIAF's Environmental Sustainability Working Group (ESWG) was established in 2019, following the introduction of the European Green Deal to ensure that the Pet Food Industry is a trusted contributor to the European circular economy and sustainability agenda. This year, FEDIAF has become established as a responsible stakeholder in the EU Green Deal political debate.

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

Signed the Code of Conduct and submitted first Annual Report

In January 2022, FEDIAF signed the EU Code of Conduct on Responsible Food Business and Marketing Practices. A year later, in January 2023, FEDIAF submitted its first annual report of activities in support of the Code.

FEDIAF is invested in disseminating and promoting the Code amongst members, which will encourage companies to transition to more sustainable practices. The report highlights how FEDIAF supports and contributes to the aspirational objectives of the Code that were identified as relevant for the pet food industry:

- Healthy, balanced and sustainable diets.
- Prevention and reduction of food loss and waste.
- Sustainable sourcing in food supply chains.

Additionally, FEDIAF participated at the two meetings organized by the European Commission in March and November 2022. At these meetings, the EC outlined the state of play of the Code and presented the results of the study on the mapping of commitments, for the wide range of companies, stakeholders and associations, under the Code.

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

The validation of the PEFCR in 2018 was a milestone for FEDIAF and members. PEF is a credible, robust and accessible methodology that was developed to help members to assess the environmental impact of their pet food products. Early in 2023, FEDIAF received a new dataset provided by the European Commission in order to proceed with the light review update of its PEFCRs. In view of this work that should start end Q1 2023, FEDIAF organized its Technical Secretariat and External Independent Review Panel, which will include an LCA, Industry and NGO experts.

Packaging legislative framework

As in previous years, FEDIAF requested via a letter to DG GROW and DG ENVI to intervene against any national provisions on packaging that fail to comply with Single Market's principles. The lack of harmonization is an important issue to our members and we kept monitoring the different initiatives at National and European Commission level.

On 30 November, the European Commission published the second part of its Circular Economy package introducing, amongst others, its proposal for the revision of the Packaging and Packaging Waste Directive (PPWD). One of the main aspects of this proposal is a change in the legal instrument, which would turn the current Directive into a Regulation. This should support harmonisation across Member States.

The Commission proposal now moves to the EU Parliament and Council, where the text will be discussed as part of the co-decision process. FEDIAF will continue to assess this proposal and engage with our umbrella organization (FoodDrinkEurope) and the EU packaging chain forum.

Identified issue and worked to protect 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 -55% 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 mainstreaming of renewable energy across all economic sectors.

However, we identified a serious risk for the sustainability of our industry with regards the decarbonization of transport: the use of Category 3 fats by-products (Cat 3) as biofuels. Cat 3 by-products are key ingredients to produce pet food. FEDIAF firmly believes that food, not intended for human consumption, should be used in pet food first, which sits well above energy use in the EU's own waste hierarchy. Other types of animal fats, such as animal by-product 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 use in biofuels.

Unfortunately, the failure to safeguard Category 3 animal fats from use in EU biofuels could trigger a higher carbon footprint for the pet food sector, as less sustainable feedstocks might be used to fill the gap. It is critical that important legislative decisions, such as the revision of the Renewable energy directive, ReFuel Maritime and Aviation, which include discussion about the use of Category 3 animal fats, are taken with precaution and consider the complete sustainability cycle that includes pet food.

This year, FEDIAF members worked intensively on this file both to raise awareness and address this issue at political level. Not only did we meet with key stakeholders but we developed several articles, press releases and joint statements with the aim of educating policy makers about the impact these different files might have on the pet food sector. FEDIAF will continue to advocate for Category 3 by-products to be used according to the EU material waste hierarchy criteria, which is in line with the Circular Economy ambitions of the EU.



F. Feed Material and Trade Working Group

INTRODUCTION

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

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

To ensure that no feed materials are forgotten, the working group also monitors any developments on the EU feed material catalogue and register, and specific incidents highlighted via the RASFF system.

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 feed 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 & keeping stakeholders talking

In summer we encountered the first issue with the interpretation of import conditions for pet food from UK to the EU or more in particular the re-import of EU manufacturers pet food via the UK land bridge to the Republic of Ireland.

Assertions that were given before February 2020, were suddenly retracted by the EU Commission. In addition, the different operating models of members and the tricky negotiations on the NI protocol, created the perfect storm.

As FEDIAF together with The Petfood Association of Ireland (PFI) and UK Pet Food we were able to keep the conversation going. We highlighted the blight of the industry when shipping from A to B and emphasized the need for a common sense solution based on the same text of Animal by-products regulation that is valid in the EU and in the UK (under retained law).

The working group will continue to be a platform for sharing technical insights between members and UK Pet Food to ensure that no further details become a stumbling block for members wishing to trade with the UK (or more precisely Great Britain).

As a working group, we will continue to closely monitor any developments with regards to import conditions under the forthcoming Target Operating Model to be issued by the UK government in due course. We will also continue to focus on monitoring any potential regulatory divergence going forward.

Cooperating with legislators

- The working group was the key platform to facilitate communication between the member state competent authorities and 3rd country authorities to enable continuous trade. The geopolitical changes put a stop to this work stream.
- The group has worked on amendments of the:
 - Key EU export markets: Monitoring developments and highlighting opportunities for improving cross border trade. Explaining to the EU commissions stakeholders that their continuous support matters a lot to the industry.
 - EU Animal By-Products Regulation & TSE Regulation: Monitoring developments and ensuring a proportionate regulatory environment.

Opportunities further afield

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

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

OBJECTIVES

The objectives of the Small Pets Working Group are:

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



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. It also works hard to support the activity of FEDIAF's Working Groups.

Over the last year, FEDIAF's Communications Working Group has been extremely busy. In addition to core work, it has been dedicated to promoting the need to protect Category 3 animal fats, a vital pet food ingredient, from use in biofuels.

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 Twitter.

OBJECTIVES

- To promote FEDIAF's scientific and technical expertise.
- To highlight the role of pets in European society.
- To support the welfare of pets.
- To promote FEDIAF's commitment to the environment and the work done by the Environmental Sustainability Working Group.

ACHIEVEMENTS

Increased Engagement with Stakeholders and Media on Cat 3 Campaign

FEDIAF members worked collaboratively with the intention of changing legislative files that were enabling and encouraging use of Cat 3, critical pet food ingredients, for biofuels. The communications campaign brought FEDIAF into regular contact with the European Parliament, CZ Presidency and European Commission plus increased liaison with other stakeholders such as APAG and FEAC.

The campaign successfully grabbed media attention with excellent articles in Politico and Euractiv plus increased engagement on social media with our LinkedIn page growing 22% and reactions up 86%, comments up over 575% and reposts up 178% in the first few months. Subsequently, social media following has almost doubled in size with excellent engagement.

Establishing the Animal Welfare Task Force

The Communications Working Group initially recruited nine members to join a Task Force dedicated to animal welfare. In November 2022, FEDIAF held its first Animal Welfare Task Force meeting and in December two co-chairs were confirmed.

Cementing the Pet Alliance with its first 'Live' Event

In September 2022, the Pet Alliance, FEDIAF's collaboration with AnimalhealthEurope, hosted its first live event at the Residence Palace in Brussels to celebrate the benefits of pet interaction, #PetPower, in the EU. Over 100 guests included EC officials, MEPs and EP staff, journalists, trade associations, NGOs, animal welfare charities and other associations working on human animal bond.

With guest speaker Peter Gorbing, Chief Executive of Dogs for Good, the event focused on the needs of assistance animals and called for the development of clear European standards. Rosa Carbonell, FEDIAF's President welcomed guests alongside the Secretary General of AnimalhealthEurope.

The Pet Alliance gives members of FEDIAF an additional platform for communicating with Brussels bubblers. The PetPowerEU Twitter page has enabled our messages to have an increased reach on the subject of the power of pet interaction with 179 followers.

FEDIAF Congress & AGM 2022

On 22-23 June 2022, FEDIAF Congress & AGM was held in person with over 130 attendees. The public website and video explainer were unveiled. Alongside some excellent speakers, we welcomed our new President Rosa Carbonell and thanked Annet Palamba for her valuable work over the previous two years.

Growth of Social Media Accounts

Over the year, our followers on LinkedIn have doubled to over 6500. The FEDIAF Twitter account is established and steady. Content shared has highlighted technical expertise, promoted the benefits of pet interaction – in addition to supporting campaigns.

Press articles and Press Releases

FEDIAF has contributed features for European Supermarket Journal, EspeciesPRO and Nordic PetXpert. The association also circulated press releases on several topics, such as the signing of papers on flexible packaging, promoting its paper on Renewable Energy Directive and signing the Code of Conduct. A number of releases were issued on the subject of Category 3 animal fats. We invite you to check our website regularly and follow us on LinkedIn to be updated on the latest developments.



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.

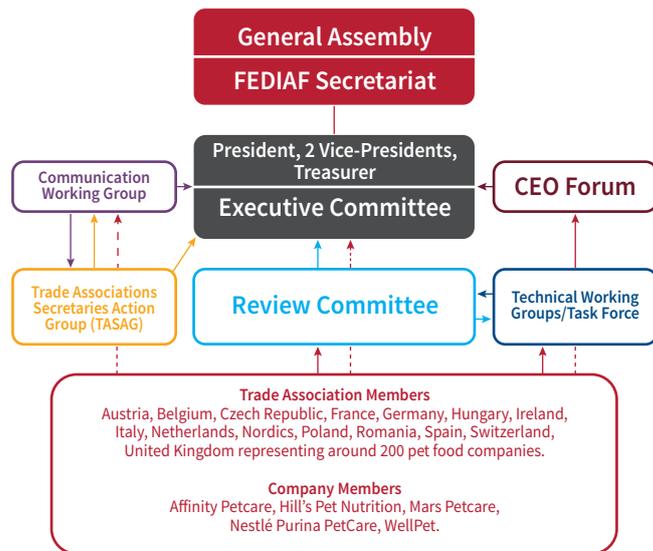
The Executive Committee and the General Assembly are chaired by the FEDIAF President, elected every two years. The President of FEDIAF since June 2022 has been Rosa Carbonell.

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 Communication WG.

OUR STRUCTURE



Committees, Working Groups and Task Force Members

EXECUTIVE COMMITTEE

Executive Committee Chair: Rosa Carbonell - Nestlé Purina PetCare

Vice-Chair: Christophe Carlier – FACCO

Vice-Chair: Jürgen Wigger – IVH

Annet Palamba – NVG

Attila Sofalvi – FHFI

Attila Gyopar – POLKARMA

Florian Wastl – Mars Petcare

Greg Van Praagh – UK Pet Food

Hermann Habe – ÖHTV

Irina Derksen – Hill's Pet Nutrition

Jana Burajová – SVPDZ

Josep Crusafont – Affinity Petcare

Katrin Langner – TASAG representative

Lina Lopez – WellPet

Mindaugas Rupsys – Mars Petcare (Co-chair Communications WG)

Pietro Molteni – ASSALCO

Robin Balas – Royal Canin (Co-Chair Review Committee)

Shane Lyster – PFAI

Sharon Schroevers – BEPEFA

Terkel Due – NPFA

Tisa Kosem – Nestlé Purina PetCare (Co-chair Communications WG)

Urs Eberhard – VHN

Victor Romano – ANFAAC

Yvan Tomaselli – Nestlé Purina PetCare (Co-Chair Review Committee)

REVIEW COMMITTEE

Co-Chair: Robin Balas – Royal Canin

Co-Chair: Yvan Tomaselli – Purina PetCare

Åsa Dufva – PPFEurope (Nordics)

Astrid Schuijlenburch – Royal Canin

Attila Gyopar – Nestlé Purina PetCare

Cedric Moulin – Nestlé Purina PetCare

Celina Torre – Affinity Petcare

Donna Snellgrove – Mars Petcare

Eva Ruiz – Royal Canin

Ingrid Van Hoek – Royal Canin

Irina Derksen – Hills Petcare VHN

Isabelle Kalmar – Versele-Lega

Izabella Balanyiné – PPFEurope (HPFA)

Jean-Louis Paillot – Nestlé Purina PetCare

Josep Crusafont – Affinity Petcare

Karen Elizabeth Linley – Mars Petcare

Lina Lopez – WellPet

Melinda Magdus – Royal Canin (HPFA)

Maria Otero Garcia – Wellness Pet

Matthew Elliot – Mars Petcare

Monika Prenner – Nestlé Purina PetCare (UK Pet Food)

Nicole Rabehl – Vitakraft (IVH)

Pierre Jaouen – Sopral (FACCO)

Stefano Zigiotto – Hills Petcare (ASSALCO)

Thomas Brenten – Saturn Petcare

Ursula Huber – Mars Petcare (ÖHTV)

Victor Romano – Affinity (ANFAAC)

Willeke Stroucken – PPFEurope (NVH)

Yvan Tomaselli – Nestlé Purina PetCare

Committees, Working Groups and Task Force Members

TRADE ASSOCIATIONS SECRETARIES ACTION GROUP (TASAG)

Chair: Raquel Izquierdo de Santiago – FEDIAF/

Katrin Langner – IVH

Antonella Baggini – ASSALCO

Alexandra Manasia – ARPAC

Åsa Dufva – Nordics

Aurélie Bynens – FACCO

Benita Beekhof – NVG

Elien Van Stichel – BEPEFA

Emmenegger Stefan – VHN

Ewa Lucyk – BEPEFA

Hege Rosenhaug – Nordics

Katrin Langner – IVH

Laura Gil Martens – Nordics

Maciej Przewdziaik – POLKARMA

Magda Hrabcova – SVPDZ

Michael Bellingham – UK Pet Food

Pablo Hervas – ANFAAC

Santiago de Andres – ANFAAC

Shane Lyster – PFAI

Tamás Racskó – FHF1

Soren Hempel Thomassen – Nordics

Stephanie Gabel – Nordics

Stéphanie Roux – FACCO

Terkel Due – Nordics

Tamara Rudavsky – ÖHTV

COMMUNICATION WORKING GROUP

Co-Chair: Mindaugas Rupsys – Mars Petcare

Co-Chair: Tisa Kosen – Nestlé Purina PetCare

Antonella Baggini – ASSALCO

Balázs Pályi – Mars Petcare

Dieter Meyer – Vitakraft

Eva Ruiz – Royal Canin

Isabel Buil – Affinity Petcare

Laureline Malineau – Royal Canin

Margarita Llobet – Nestlé Purina PetCare

Monika Vavrova – Hill's Pet Nutrition

Nicole Paley – UK Pet Food

ANIMAL WELFARE TASK FORCE

Co-Chair: Laureline Malineau – Royal Canin

Co-Chair: Tisa Kosem – Nestlé Purina

Andrea Bauer – Royal Canin

Barbara Thiel – Bewital

Christophe Carlier – Royal Canin

Frank von der Brüggen – PetCom Tierernahrung

Gerd Grossheider – Gimborn

Luisa Vierbaum – Rondo Food

Mindaugas Rupsys – Mars

Monika Vavrova – Hill's Pet Nutrition

Oriol Baulenas – Affinity

ADDITIVE AND UNDESIRABLE SUBSTANCES WORKING GROUP

Chair: Matthew Elliott – Mars Petcare

Vice-chair: Amelie Serment – Nestlé Purina PetCare

Aline Hartman – Nestlé Purina PetCare

Audrey Sauthier – Nestlé Purina PetCare

Aline Hartman – PPF Europe

Boris Terlinden – Rondo Food

Emanuel Fischbacher – Bosch Tiernahrung

Gert Grossheider – Gimborn

Hilke Seyffarth – Nestlé Purina PetCare

Irina Derksen – Hill's Pet Nutrition

Jerome Naar – Royal Canin

Martin van Bohemen – Hill's Pet Nutrition

Marina Stoeckel – Saturn Petcare

Martin Kaczara – Hill's Pet Nutrition

Michael Alvermann – Deutche-tiernahrung

Pablo Belmar von Kretschmann – Royal Canin

Paula Carolina Wartelski – Nestlé Purina PetCare

Pierre Jaouen – Sopral

Ursula Huber – Mars Petcare

Victor Romano – Affinity Petcare

Viviana Fadino – Nestlé Purina PetCare

NUTRITION WORKING GROUP

Chair: Thomas Brenten – Saturn Petcare

Vice-chair: Lisa Conboy – Nestlé Purina PetCare

Ariane Wehrmaker – Saturn Petcare
Astrid Schuijlenburch – Royal Canin
Britta Lammers – Mars Petcare
Celina Torre – Affinity Petcare
Francis Pastoor – Dechra
Ingrid Van Hoek – Royal Canin
Isabelle Jeusette – Affinity Petcare
Iveta Becvarova – Hill's Pet Nutrition
Jean-Cristophe Bouthegourd – Nestlé Purina PetCare
Karin Kuhn – Bosch Tiernahrung
Libby Sheridan – Nestlé Purina PetCare
Lucia Rettenbeck – Interquell
Mikki Koot – Edgard & Cooper
Petra Hellweg – Mars Petcare
Patrick Nquyen – Orange
Sanan Talibov – De Haan Petfood

FEED MATERIALS AND TRADE WORKING GROUP

Chair: Monika Prenner – Nestlé Purina PetCare

Vice-Chair: Ursula Huber – Mars Petcare

Alfred Schlosser – Nestlé Purina PetCare
Andreas Thoben – Vitakraft
Aurélié Bynens – FACCO
Balázs Pályi – Mars Petcare
Barbara Rondo Brovetto – Nestlé Purina PetCare
Benjamin Petiteau – FACCO
David Van Belle – Wellpet
Ignacio Conde – Affinity Petcare
Irina Derksen – Hill's Pet Nutrition
Kounawit Heng – Nestlé Purina PetCare
Kristel Wolfs – Wellpet
Lynn Insall – UK Pet Food
Martina Gerndt – Mars Petcare
Martin van Bohemen – Hill's Pet Nutrition
Massimo Pagani – United Petfood

Mindaugas Rupsys – Mars Petcare
Sabine Mladenovic-Spiss – Ospelt
Sarka Hrubcova – Hill's Pet Nutrition
Shane Lyster – PFAI
Silke Santana – Nestlé Purina PetCare
Stéphanie Roux – FACCO
Stephane Peeters – Spectrum
Teresa Fischerova – Hill's Pet Nutrition

CATEGORY 3 TASK FORCE

Chair: Balázs Pályi – Mars Petcare

Alfred Schloesser – Nestle Purina
Aurélié Bynens – FACCO
Dr. Bartocci – ASSALCO
Ignacio Conde – Affinity Petcare
Mindaugas Rupsys – Mars Petcare
Monika Prenner – Nestlé Purina PetCare
Pierre Jaouen – Sopral
Silke Santana – Nestlé Purina PetCare
Stephan Beckmann – Mars Petcare
Tisa Kosen – Nestlé Purina PetCare

ANALYTICAL SCIENCE WORKING GROUP

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

Co-Chair: Ingrid Van Hoek – Royal Canin

Colin Costin – Mars Petcare
Cynthia Joly – Nestlé Purina PetCare
Elena Hijosa – Dibaq Petcare
Paul Stoeber – Nestlé Purina PetCare
Tobias Gorniak – Fihumin

Committees, Working Groups and Task Force Members

PRODUCT COMMUNICATION WORKING GROUP

Chair: Victor Romano – Affinity Petcare

Vice-Chair: Monika Prenner – Nestlé Purina PetCare

Andreas Thoben – Vitakraft

Aurélie Bynens – FACCO

Aurelien Goliard – Nestlé Purina PetCare

Balázs Pályi – Mars Petcare

Frauke Schibilla – Vitakraft

Henning Beckmann – IVH

Ilaria Pesci – Royal Canin

Ines Munzfeld – Mars Petcare

Irina Derksen – Hill's Pet Nutrition

Klaus Tesch – Saturn Petcare

Laetitia Rouillé – Nestlé Purina PetCare

Lotte van Rooijen – Afbinter National

Manou Goeminne – Versele-Lega

Marco Halff – Queens Products

Maria Luisa Valentini – Nestlé Purina PetCare

Marina Stoeckel – Saturn Petcare

Martin Kaczara – Hills Petcare

Michael Alvermann – Deutche Tiernahrung

Monika Prenner – Nestlé Purina PetCare

Monika Vavrova – Hill's Pet Nutrition

Pierre Jaouen – Sopral

Shane Lyster – PFAI (Ibec)

Stéphane Peeters – Spectrum Brands

Willeke Stroucken – Ppf Europe

Tommaso Mechelli – Affinity Petcare

Victor Romano – Affinity Petcare

ENVIRONMENTAL SUSTAINABILITY WORKING GROUP

Chair: Eva Ruiz – Royal Canin

Vice-Chair: Cedric Moulin – Nestlé Purina PetCare

Ales Weiner – PPFEurope

Amaya Lopez Sastre – Petselect

Balázs Pályi – Mars Petcare

C. Ritteser – Bewital

Christian Schunemann – IVH

Daniela Peloponese – Hill's Pet Nutrition

Eva Ruiz – Royal Canin

Franz Kainz – Ospelt

Irina Derksen – Hill's Pet Nutrition

Jérôme Patte – Virbac

Karen Elizabeth Linley – Mars Petcare

Laetitia Rouillé – Nestlé Purina PetCare

Lisa Conboy – Nestlé Purina PetCare

Luiz Dias – Affinity Petcare

Maria Otero Garcia – Wellness Pet

Mireia Garcia – Affinity Petcare

Monika Vavrova – Hill's Pet Nutrition

Nicole Paley – UK Pet Food

Paul van der Raad – Protix

Paula Wartelski – Nestlé Purina PetCare

Pierre Martinez – Virbac

Pietro Bartocci – ASSALCO

Stéphanie Roux – FACCO

SMALL PETS WORKING GROUP

Co-Chair: Isabelle Kalmar – Versele-Lega

Co-Chair: Donna Snellgrove – Mars Petcare

Alan Gittins – Mr Johnson's

Andreas Thoben – Vitakraft

Andrea Sassi – Fastwebnet

Angelique Bremer – Vitakraft

Barbara Venturelli – Gimborn

Claire Hamblion – Supreme Petfoods

Elena Fernandez Sanchez – Dibaq

Georgina Shrimpton – Beaphar

Guy Werquin – Versele-Lega

Jan-Cristoph Schwarze – Spectrum Brands

Juliette Marshall – Mazuri Zoo Foods Dilsds

Marion Turnbull – Cargill

Michael Bellingham – UK Pet Food

Patrick Ghysels – Versele-Lega

Sam Marriage – Marriage's Millers

Sarah Hormozi – UK Pet Food

Tom Decock – Versele-Lega

Wojciech Rosolowki – Tropical

ORGANIC TASK FORCE

Chair: Alice Tempel Costa – FEDIAF/

Victor Romano – Affinity petcare

Aurélie Bynens – FACCO

Gian Andrea Guidetti – Forza 10

Henning Beckmann – IVH

Ines Muenzefeld – Mars Petcare

Jean-Christophe Bouthegourd – Nestlé Purina PetCare

Mikki Koot – Edgard Cooper

Monika Prenner – Nestlé Purina PetCare

Pierre Jaouen – Sopral

Rogier van Anholt – Yarrah

Sara Centenaro – Forza 10

Stéphanie Roux – FACCO

Willeke Strouken – PpfEurope



The Secretariat Team



ROSA CARBONELL
PRESIDENT, FEDIAF
(2022 - PRESENT)

Rosa has over 20 years of experience in the Pet Care industry in pet food and pharmaceuticals, in addition to a track record in national trade associations and in the IESE Women management forum. Rosa holds a Veterinary degree from the University Autònoma of Barcelona, an MBA from Girona University and a Program for Directive Development (PDD) from the IESE Business School.



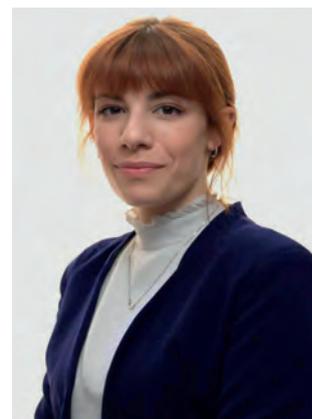
RAQUEL IZQUIERDO DE SANTIAGO
SECRETARY GENERAL,
FEDIAF
(2020 - PRESENT)

Raquel Izquierdo de Santiago studied law in Salamanca (Spain) 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. She joined FEDIAF in September 2020 as Secretary General.



ALICE TEMPEL COSTA
DEPUTY SECRETARY
GENERAL & 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 ten years' experience in European Trade Associations in Brussels. Before joining FEDIAF in September 2020, she worked for DG AGRI at the European Commission, FAO, Embrapa (The Brazilian Agricultural Research Corporation) and Wageningen University.



KATERINA ALEXOPOULOU
JUNIOR SCIENTIFIC &
REGULATORY AFFAIRS
POLICY ADVISOR, FEDIAF
(2022 - PRESENT)

Katerina Alexopoulou holds a Food Science and Nutrition BSc degree from the University of the Aegean and a master's degree in Food Safety and Quality Management Systems from the Agricultural University of Athens (Greece). She has worked in nutritional technical-scientific positions in both private and public sectors. Before joining FEDIAF, she worked on feed additives legislation, in the Animal Nutrition and Medicated feed directory at DG SANTE of the European Commission.



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.

öhtv

AUSTRIA

öhtv

Österreichische Heimtierfuttermittel

Vereinigung

c/o Fachverband der Nahrungs- und Genussmittelindustrie

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1030 Wien

Austria

T: +43 1 7122121-0

info@oehtv.at

<http://oehtv.at/>

info@oehtv.at



BELGIUM

BEPEFA

Belgian Petfood Association

Rue de l'Hôpital, 31

1000 BRUXELLES

Belgium

info@bepefa.eu

www.bepefa.eu



CZECH REPUBLIC

SVPDZ

Sdružení výrobcu potravy pro domácí zvířata

Pražská 320

257 21 Porici nad Sazavou

Czech Republic

svpdz@svpdz.cz

www.svpdz.cz



DENMARK

Finland

Norway

Sweden

NPFA

Nordic Pet Food Association

c/o MLDK – Mærkevarereleverandørerne

Dirch Passers Alle 76, 3. sal

2000 FREDERIKSBERG

Denmark

T: +45 33 13 92 92

indsigt@mldk.org

www.npfa.dk



FRANCE

FACCO

Chambre syndicale des fabricants

d'aliments pour chiens, chats, oiseaux et autres animaux
familiers

46, Boulevard de Magenta

75010 PARIS

France

T: +33.1.48.03.29.11

facco@facco.fr

www.facco.fr



GERMANY

IVH

Industrieverband Heimtierbedarf e.V.

Postfach 11 06 26

40506 DÜSSELDORF

Germany

T: +49.211.59.40.74

info@ivh-online.de

www.ivh-online.de

FEDIAF Membership



HUNGARY

FHFI

Federation of Hungarian Food Industries

Bécsi út 126-128.

1034 Budapest

Hungary

T: +36 30 197 53 88

tamas.racsko@elelmiszeripar.hu

<http://elelmiszeripar.hu/>



IRELAND

PFAI – Petfood 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



ITALY

ASSALCO

Associazione Nazionale tra le Imprese per l’Alimentazione e la Cura degli Animali da Compagnia

Piazza di Spagna, 35

00187 ROME

Italy

T: +39 06 69 20 08 98

assalco@assalco.it

www.assalco.it



NETHERLANDS

NVG

Nederlandse Voedingsindustrie

Gezelschapsdieren

Reitseplein 1

5037 AA Tilburg

Netherlands

T: + 31.183.64.50.23

F: + 31.183.62.11.61

nvg@atriumgroep.nl

www.nvg-diervoeding.nl



POLAND

POLKARMA

Polish Pet Food Manufacturers’ Association

ul. Woronicza 31/152,

02-640 Warszawa

Poland

T: +48.22.646.88.18

sekretariat@polkarma.pl

www.polkarma.pl



ROMANIA

ARPAC

Asociatia Romana a Producatorilor de Hrana pentru Animale de Compagnie

Str. Stirbei Voda, 26-28

Union International Center II

9th Floor, sect. 1

Bucharest

Romania

office@arpac.ro

www.arpac.ro/



SPAIN

ANFAAC

Asociación nacional de fabricantes de alimentos para animales de compañía

c/ San Agustín, 15-1° derecha
28014 MADRID

Spain

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F: +34.91.369.39.67

anfaac@anfaac.org

www.anfaac.com



Verband für Heimtiernahrung
Société pour l'alimentation des animaux familiers

SWITZERLAND

VHN

Verband für Heimtiernahrung

Thunstrasse, 82

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F: +41.31.351.00.65

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www.vhn.ch



UNITED KINGDOM

UK Pet Food (The Pet Food Manufacturers' Association)

Aviation House, 125 Kingsway

London WC2B 6NH

United Kingdom

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F: + 44.207.836.7409

info@ukpetfood.org

www.ukpetfood.org



Affinity Petcare

Plaça d'Europa, 54-56,

08902 L'Hospitalet de Llobregat

Spain

<https://www.affinity-petcare.com/en>



Hill's

Hill's Pet Nutrition

Grabetsmattweg

4106 Therwil

Switzerland

www.hillspet.com



Mars Pet Care

Eitzer Str. 215

27283 Verden

Germany

ww.mars.com



Nestlé Purina PetCare

Nestlé Purina PetCare Europe

Av. Nestlé 55

1800 Vevey

Switzerland

www.purina.eu/



WellPet

WellPet Belgium BVBA

Leonardo da Vincilaan 19

MC Square

1831 Machelen, Diegem

Belgium,

www.wellnesspet.com

Facts & Figures European Overview 2022

TOP PETS IN EUROPE



CATS
127m



DOGS
104m



ORNAMENTAL
BIRDS
53m



SMALL
MAMMALS
29m



AQUARIA
22m



TERRARIA
11m



340m PETS IN EUROPE



91 MILLION HOUSEHOLDS
(46% of all households)

Estimated number of European households
owning at least one pet

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

EU **Europe**

Cats: 25% Cats: 26%

Dogs: 25% Dogs: 25%

Annual sales of pet food products **29.1bn** **10.5**
TURNOVER MILLION TONNES

Annual growth in volume **3.5%**

Annual growth rate of the pet food industry
(Average value of the past three years) **5.1%**

Related services and products **24.5bn**
(Accessories and services) (+ 4.5%)



150 Pet food companies

200 Plants (Est.)

EMPLOYMENT

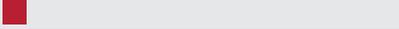
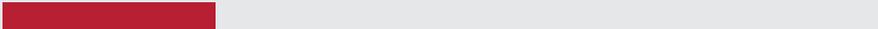
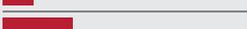
Est. direct employment: **118 000**

Est. indirect employment: **950 000**

Facts & Figures

European Dog Population



AUSTRIA		766 000
BELGIUM		2 029 000
BULGARIA*		750 000
CZECH REPUBLIC		2 211 000
DENMARK		617 000
ESTONIA*		235 000
FINLAND		781 000
FRANCE		7 600 000
GERMANY		10 600 000
GREECE		657 000
HUNGARY		2 172 000
IRELAND		495 000
ITALY		8 755 000
LATVIA*		270 000
LITHUANIA*		550 000
NETHERLANDS		1 500 000
NORWAY		494 000
POLAND		8 019 000
PORTUGAL		2 605 000
ROMANIA		4 193 000
RUSSIA		17 558 000
SLOVAKIA		915 000
SLOVENIA*		295 000
SPAIN		9 313 000
SWEDEN		1 044 000
SWITZERLAND		554 000
TURKEY		1 386 000
UKRAINE		4 984 000
UNITED KINGDOM		13 000 000
TOTAL EUROPE		104 348 000
TOTAL EU		66 866 000

* Bulgaria, Estonia, Latvia, Lithuania, Slovenia data taken from previous 2021 Facts & Figures report.
Data sourced via FEDIAF's National Association members.

Facts & Figures

European Cat Population



AUSTRIA		2 047 000
BELGIUM		2 536 000
BULGARIA*		815 000
CZECH REPUBLIC		1 364 000
DENMARK		669 000
ESTONIA*		290 000
FINLAND		982 000
FRANCE		14 900 000
GERMANY		15 200 000
GREECE		608 000
HUNGARY		2 388 000
IRELAND		355 000
ITALY		10 228 000
LATVIA*		410 000
LITHUANIA*		605 000
NETHERLANDS		1 900 000
NORWAY		783 000
POLAND		7 125 000
PORTUGAL		1 795 000
ROMANIA		4 371 000
RUSSIA		23 150 000
SLOVAKIA		540 000
SLOVENIA*		455 000
SPAIN		5 859 000
SWEDEN		1 703 000
SWITZERLAND		1 793 000
TURKEY		4 660 000
UKRAINE		7 630 000
UNITED KINGDOM		12 000 000
TOTAL EUROPE		127 161 000
TOTAL EU		77 928 000

Facts & Figures

European Ornamental Bird Population



AUSTRIA		195 000
BELGIUM		331 000
BULGARIA*		45 000
CZECH REPUBLIC		69 000
DENMARK		202 000
ESTONIA*		N/A
FINLAND		56 000
FRANCE		5 800 000
GERMANY		4 900 000
GREECE		974 000
HUNGARY		412 000
IRELAND		92 000
ITALY		12 882 000
LATVIA*		N/A
LITHUANIA*		N/A
NETHERLANDS		230 000
NORWAY		195 000
POLAND		1 144 000
PORTUGAL		641 000
ROMANIA		292 000
RUSSIA		3 280 000
SLOVAKIA		32 000
SLOVENIA*		40 000
SPAIN		6 991 000
SWEDEN		309 000
SWITZERLAND		304 000
TURKEY		11 291 000
UKRAINE		784 000
UNITED KINGDOM		1 600 000
TOTAL EUROPE		53 091 000
TOTAL EU		35 832 000

Facts & Figures

Estimated number of European Aquaria

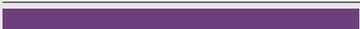
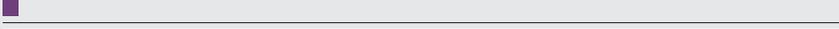
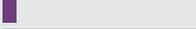
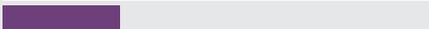


AUSTRIA		310 000
BELGIUM		320 000
BULGARIA*		70 000
CZECH REPUBLIC		80 000
DENMARK		280 000
ESTONIA*		N/A
FINLAND		40 000
FRANCE		1 252 000
GERMANY		2 300 000
GREECE		90 000
HUNGARY		90 000
IRELAND		27 000
ITALY		1 500 000
LATVIA*		N/A
LITHUANIA*		N/A
NETHERLANDS		339 000
NORWAY		125 000
POLAND		380 000
PORTUGAL		83 000
ROMANIA		150 000
RUSSIA		3 750 000
SLOVAKIA		51 000
SLOVENIA*		35 000
SPAIN		691 000
SWEDEN		260 000
SWITZERLAND		380 000
TURKEY		850 000
UKRAINE		450 000
UNITED KINGDOM		8 000 000
TOTAL EUROPE		21 903 000
TOTAL EU		8 473 000



Facts & Figures

European Small Mammal Population

AUSTRIA		508 000
BELGIUM		1 026 000
BULGARIA*		60 000
CZECH REPUBLIC		186 000
DENMARK		373 000
ESTONIA*		N/A
FINLAND		157 000
FRANCE		2 800 000
GERMANY		4 900 000
GREECE		417 000
HUNGARY		398 000
IRELAND		162 000
ITALY		1 816 000
LATVIA*		N/A
LITHUANIA*		N/A
NETHERLANDS		346 000
NORWAY		169 000
POLAND		1 217 000
PORTUGAL		218 000
ROMANIA		93 000
RUSSIA		6 601 000
SLOVAKIA		46 000
SLOVENIA*		85 000
SPAIN		1 523 000
SWEDEN		494 000
SWITZERLAND		655 000
TURKEY		808 000
UKRAINE		899 000
UNITED KINGDOM		3 360 000
TOTAL EUROPE		29 317 000
TOTAL EU		16 994 000

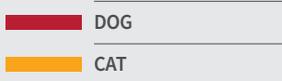
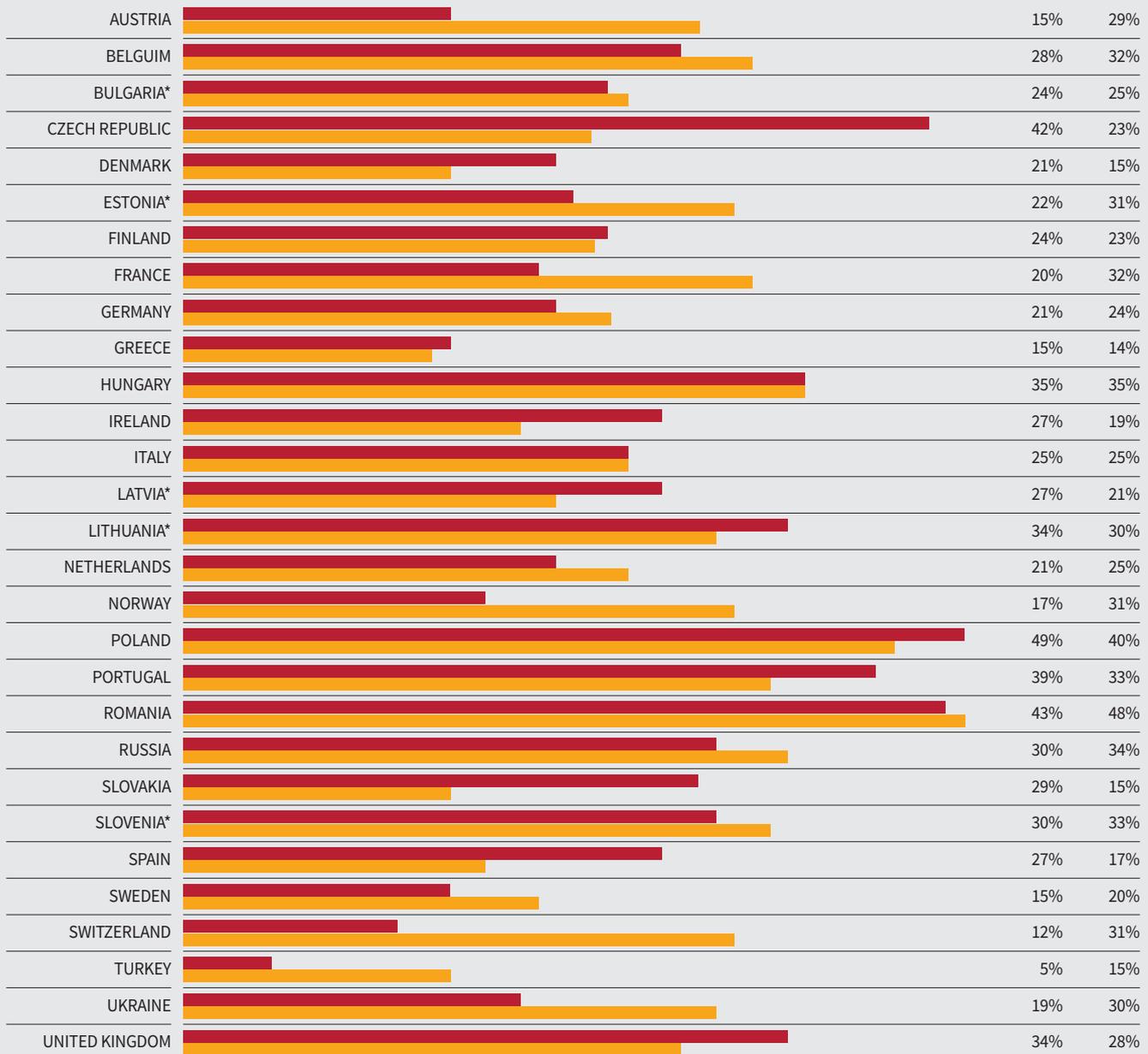
Facts & Figures European Terraria



AUSTRIA		129 000
BELGIUM		160 000
BULGARIA*		14 000
CZECH REPUBLIC		5 000
DENMARK		110 000
ESTONIA*		N/A
FINLAND		29 000
FRANCE		2 100 000
GERMANY		1 300 000
GREECE		6 000
HUNGARY		60 000
IRELAND		20 000
ITALY		1 366 000
LATVIA*		N/A
LITHUANIA*		N/A
NETHERLANDS		59 000
NORWAY		94 000
POLAND		215 000
PORTUGAL		39 000
ROMANIA		32 000
RUSSIA		1 076 000
SLOVAKIA		4 000
SLOVENIA*		3 500
SPAIN		1 464 000
SWEDEN		60 000
SWITZERLAND		27 000
TURKEY		157 000
UKRAINE		903 000
UNITED KINGDOM		2 200 000
TOTAL EUROPE		11 632 500
TOTAL EU		7 269 500

Facts & Figures

% of European Households Owning at Least One Dog or One Cat



Glossary

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





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