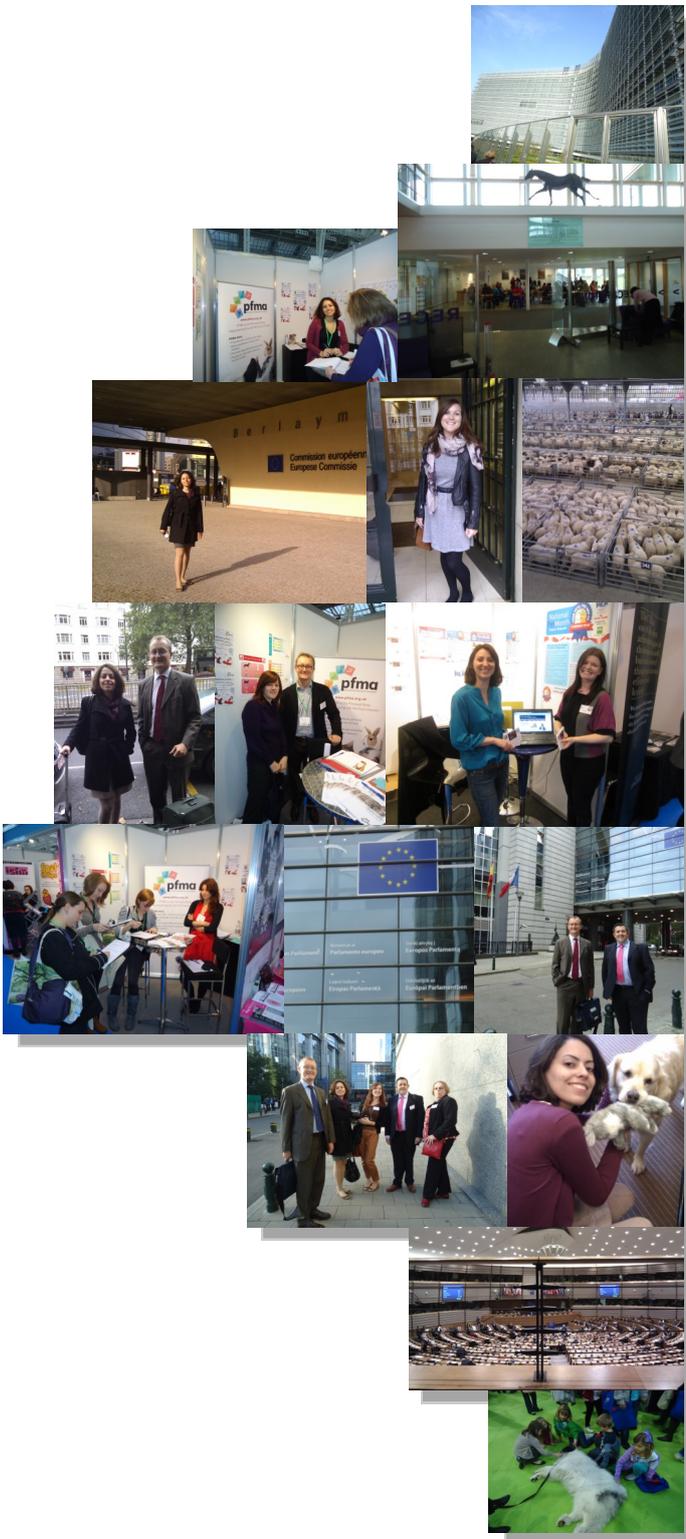




A N N U A L
R E P O R T
2012

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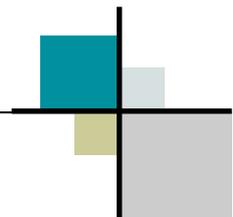
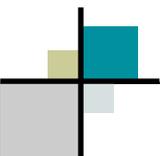


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Mission Statement

PFMA aims to be the credible voice of a responsible pet food industry. While striving to achieve a balanced regulatory environment for the production of nutritious and safe food, PFMA also encourages responsible pet ownership working in partnership with relevant pet bodies. It aims to be the main resource for its members, public and others as well as playing a lead role in forming opinions in Europe through the European Pet Food Federation (FEDIAF).



Chairman's Foreword

Welcome to the PFMA Annual Report for 2012. Inside you will find an account of our activities over the last year, alongside the latest information on pets and the pet food market. As our annual survey has consistent methodology, it is widely used and quoted by members and media alike; I'm sure you will find it useful.

For the last couple of years we have all been weathering a challenging economy, yet throughout this time, pet food sales have remained resilient, typically growing 1% to 1.5% ahead of GDP. This last year has been no exception and our latest industry data indicates sales are holding up with a 1% increase in value terms and in 2011 the pet food industry standing at £2.14bn. In addition we have not seen any decline in pet populations, unlike previous recessions. Talking to our stakeholder charities, they report higher levels of rehoming, but equally more uptake, resulting in a more rapid movement of animals through their centres; a gratifying insight. As pet populations have remained largely stable over the last few years, we see no indicators that this is set to change in the near future. All producers of pet food are connected directly to pets and their owners and we have all long-believed that pets occupy a significant role in British society. Recent market research that we commissioned has confirmed this; specifically that recession-hit families look at reducing spending on every other area first, before they consider reducing it on their pets. This resilience has also been picked up by the media with several publications featuring pet food, including Radio 4's flagship consumer programme You & Yours.

Last year was very much one of collaboration for the PFMA, particularly in the area of education. Triggered by a question at a previous AGM, we saw that the PFMA was well placed to act as a catalyst in bringing the many threads of positive pet education together. Our symposium in February 2011 with the 20 most significant pet organisations, discussed not only the importance of pet welfare education in schools and elsewhere, but also how we might work collaboratively as a sector to make sure we make the best of limited resources. I personally am delighted to see how far we have come in just one year, culminating with the launch of the Pet Education Resources website. This simple tool seems so obvious, but for the first time gives teachers and other educators a single easy access point to

the wealth of education materials which have been built up by a large number of organisations in the pet sector. This was trialled at the Education Show and garnered a great deal of interest. Alongside this important piece of work we have also been pressing at a higher political level to ensure that pet welfare remains a distinct thread throughout the National Curriculum. With 48% of households having a pet and the majority of these with school age children, it would be a backward step to lose this as an area of the National Curriculum. With the excellent collaboration shown in both these areas, it shows how effective the pet sector is when acting together. I am proud of the role PFMA has played in acting as a catalyst and co-ordinator for this group.

Looking ahead, the fact that in March the authorities are already talking about water shortages shows the pressure on our natural resources. Our 2020 Vision guides the PFMA in helping to minimise our industry's use of water, energy and other resources. Member companies are looking to the PFMA to establish and exchange best practice and liaise to bring more education and training to this area. We need to feed our pets just as we need to feed ourselves, but in a way that continues to underline the role of pet food manufacture in utilising the by-products from the human food chain. With the activity on labelling and regulation receding for the moment, this next period for the PFMA will focus on 2020 and practical initiatives will be announced later in the year.

Finally, I would like to thank all member companies that have provided resource and knowledge to support the essential work of the PFMA committees. Without this essential aspect of how we work, our organisation and indeed our industry would be less healthy than it is at present and would not achieve the respect that we have built up through government and the wider stakeholder community.



Paul Miley,
Chair PFMA



Meet the PFMA Team

MICHAEL BELLINGHAM - Chief Executive



Michael joined PFMA in 2004. He has worked in the trade association world for a number of years, firstly with the British Retail Consortium, before moving to the Food and Drink Federation in 1996, then the Federation of European Rice Millers (FERM) in Brussels in 2000.



LANA OLIVER

Technical and Regulatory Affairs Manager



Dealing with all technical and legislation issues, acting as an intermediary between government and the industry, and providing advice to members are some aspects of Lana's role. After graduating from University Lana began working in the food industry before

joining PFMA in 2009. Lana co-ordinates the technical working parties at PFMA as well as the Review Committee.

NICOLE PALEY

Communications Manager



Nicole Paley (currently on maternity leave until June 2012) joined the PFMA in 2003. Nicole is the PFMA Communications Manager, managing the media relations and the work PFMA undertakes promoting animal health and welfare.

Nicole is the proud owner of a ginger and white moggie called Poppy.

NICOLA GROWCOTT

Communications Executive



Nicola joined PFMA in August 2011 to provide maternity cover. Nicola studied English Literature at university and has previously worked for a youth charity. Nicola co-ordinates the Communications Committee, manages PFMA's relations

with the media and stakeholders, and internal communications with PFMA members.

SARAH HORMOZI

Veterinary and Nutrition Affairs



Sarah has been managing the veterinary and nutrition issues since joining the PFMA team in May 2011. Sarah has a BSc in Biology and a MSc from Kings College London, researching Animal Assisted Therapy. As well as running the PFMA Veterinary and Nu-

trition Committee, Sarah has editorial and event management roles. Sarah is the first point of contact for the public, press and members of the association.

PFMA's Aims and Membership Benefits

PFMA aims to be the credible voice of a responsible pet food industry. While striving to achieve a balanced regulatory environment for the production of nutritious and safe food, PFMA also encourages responsible pet ownership working in partnership with relevant pet bodies. It aims to be the main resource for its members, public and others as well as playing a lead role in forming opinions in Europe through the European Pet Food Federation (FEDIAF).

PFMA have been supporting pet food manufacturers for over 40 years. Membership of PFMA allows companies to be able to gain one to one expert advice and guidance on all matters related to the pet food industry.



The opportunity to influence policy and legislation through joining PFMA committees

Members only market data

Networking opportunities with other members and those involved in the pet industry.

Specialist advice and support on regulatory and technical matters

Access to members only website - a one stop shop for information on developments in the pet food industry.

Training seminars and workshops

Promotion through the PFMA website links and banners

Media and public relations support

Crisis Management support e.g. disease outbreak

PFMA Member Services

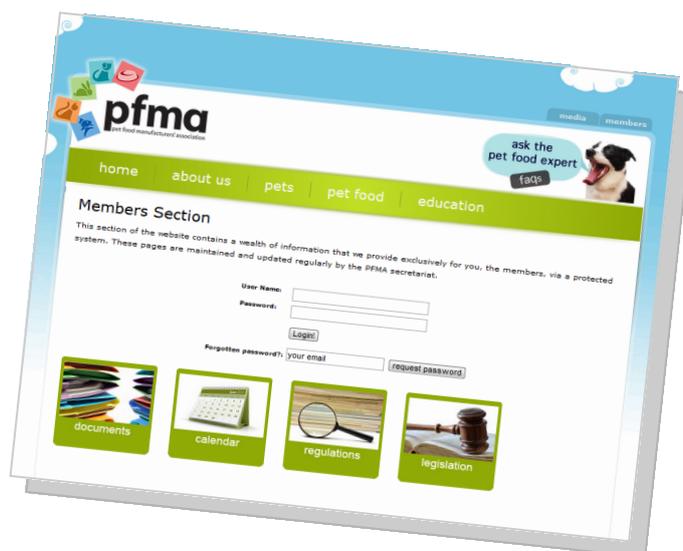
The PFMA's work is effectively achieved through a committee-based structure in which all member companies are invited to participate. Policies for the pet food industry are formed in these committees in direct response to legislative and technical matters. All PFMA members are kept up-to-date on the Association's activities and are regularly consulted on specific issues.

In recent years a great deal of new and amended legislation has been introduced which has affected the pet food industry. Membership of PFMA is an effective and easy way for companies to ensure they are fully aware of all current developments in the industry.

For example, when changes are proposed in legislation, members of the PFMA will not only receive advance warning and an opportunity to comment, but will also receive an explanation of the practical implications of such changes.

Members-only Extranet

The extranet contains a wealth of information via a protected system. Members can find out about the latest industry news, download key pieces of legislation and access industry guidelines.



PFMA Market Data Scheme

We offer member companies the opportunity to participate in the PFMA market data scheme which has been running since 1995. The scheme is coordinated by a third party market research company and the purpose is to collect sound, robust industry data. Data is collected on an annual basis and a bumper market report is produced for the scheme members.

Through participating in the scheme members can:

- Estimate their market share
- Look at their performance in comparison to the market as a whole
- Keep up to date with trends in the pet food market
- Better understand performance of different pet food categories

In addition to information on market value and volume, the survey of members also collects information on:

- The proportion of own-label versus branded products
- The location of manufacture
- The channel through which the product is distributed

While not aiming to be representative of the total market, these additional questions provide information on broad trends.



PFMA Officers and Committees

EXECUTIVE COMMITTEE

Establishing and monitoring PFMA policies, direction and focus.

Chair: Paul Miley
Secretariat: Michael Bellingham

REVIEW COMMITTEE

Identifying, monitoring and commenting on all legislative and other developments in the marketing and technical areas.

Co-Chairs:
Liz Colebrook & Monika Prenner
Secretariat:
Lana Oliver



ADDITIVES WORKING PARTY

Monitoring and influencing legislation concerning additives.

Chair: Alana White
Secretariat:
Lana Oliver

SMALL ANIMAL WORKING PARTY

To act as an issues forum and a representative body on matters related to small animal nutrition.

Chair: Marion Turnbull
Secretariat:
Michael Bellingham

VETERINARY NUTRITION COMMITTEE

To consider all veterinary & nutritional issues. Providing a resource to members and the public.

Chair: Pauline Devlin
Secretariat:
Sarah Hormozi

ENVIRONMENT COMMITTEE

Monitoring and recommending policies on environmental legislation and other environmental issues of impact to the industry

Chair: Keith Battye
Secretariat:
Michael Bellingham

COMMUNICATIONS COMMITTEE

Developing strategies to communicate effectively with both internal and external audiences. Managing media relations and PFMA's responsible pet ownership activities.

Chair: Sarah Alexander
Secretariat:
Nicola Growcott

RAW MATERIALS WORKING PARTY

Dealing with legislation affecting raw materials, such as the Animal-By-Products Regulations and relevant EC Directives

Chair: Phil Taylor
Secretariat:
Lana Oliver

PFMA Website

The PFMA website is the Association's principal communication tool providing independent and good quality information to the public as well as being a useful tool for members.

Statistics on the PFMA website activity are constantly being recorded. This action allows PFMA to understand what information visitors are looking for and which areas on the website have more frequent visits than others. Detailed statistics help identify which parts of the PFMA website to focus on in order to provide the most benefit to visitors - public, media and members.

In 2011, the PFMA website had a major interface change, to allow faster and easier navigation for users. In the new and improved version pet owners can find topics such as 'Understanding Pet Food' and 'Feeding Tips' as well as an 'Ask the Pet Food Expert' section from the home page.

PFMA have been revising and updating the website on a regular basis to make sure the information provided stays fresh and, most importantly, accurate. PFMA will continue to revise and update the website on a regular basis.

The most visited pages of the PFMA website continue to be the Pet Population pages. PFMA commissions new data to be collected every year and makes this publicly available through the website and in the Annual Report. Pet Population statistics for 2012 can be found on page 14 of this report.



What information are visitors looking for?

1. Pet Population Statistics
2. Dog Nutrition
3. Information about PFMA
4. Pet Food Ingredients

Four Future Ambitions of PFMA for 2020



Reducing the impact of pet food on the environment

Many pet food manufacturers and members of the PFMA already have their own targets for environmental issues, however, the PFMA teamed up with WRAP to encourage all members to hit set targets: 10% reduction of CO₂ emissions, 20% reduction in water usage and a total of 80% of all packaging to be recyclable or recoverable by 2020.

“Whether at home or at work, reducing the amount of waste we produce is the most effective thing we can do to protect our natural resources, cut costs and reduce our carbon footprint.” WRAP



Increase responsible pet ownership

At PFMA we believe it is our duty to promote responsible pet ownership, as responsible pet owners tend to have the happiest and healthiest pets that are fed and cared for well. In 2009 the PFMA launched an Obesity Campaign and created the Pet Size-O-Meter, a valuable tool for assessing our pets health. Over 170,000 Pet Size-O-Meters have been distributed so far with the help of pet charities (including the largest dog welfare charity, the Dogs Trust), re-homing centres, breeders, vet organisations, and pet insurance companies. PFMA aim to have 60% of new pet owners in receipt of the tool (plus additional pet care advice), 50% more visitors returning to the PFMA website for pet advice and 10% fewer dogs sent to re-homing centres by 2020.

“Working with the PFMA we hope to improve public knowledge and increase responsible pet ownership, in turn reducing the number of pets that are neglected, mistreated and abandoned every day. We want to educate people that having a pet can bring you a lifetime of fun and happy memories, and that it is owners responsibilities to provide them with everything they need in a caring and loving home.” Dog’s Trust



Increase public awareness of the benefits pets have on our society

Being firm believers that pets are of great value to the family, from the very young to the elderly, PFMA have been working closely with MPs and the Society for Companion Animal Studies (SCAS) to highlight the health and social benefits that pets bring. PFMA and SCAS hope that by 2020 we will see that no elderly pet owners are parted from their pets when moving to sheltered accommodation and residential homes.

“Research has shown that pets provide benefits to all ages. Working alongside the PFMA with their funding will allow us the opportunity to continue researching and to teach others about the facts so that more people can benefit from pet interaction.” SCAS



Increase public awareness of the advantages of feeding prepared pet food

PFMA wish to highlight the numerous health and environmental advantages there are to feeding our pets prepared pet food, and want to see a minimum 90% of pet owners feeding their pets commercially prepared pet food by 2020. PFMA act to reinforce the message that pet foods are regularly updated following research allowing manufacturers to enhance pet health and wellbeing through their products resulting in healthier, longer living pets. The PFMA have the support of the Pet Health Council in their ambition and in cooperation they endeavour to bust the myths surrounding pet food.

“The amount of nutritionally related problems we encountered 30 years ago was legion. We saw bad coats, poor teeth, poor digestion, rickets and shortened life spans. This was all as a result of inadequate nutrition. The widespread feeding of prepared pet foods and advancements in these diets has made a major difference. Pets are now living longer, healthier lives and we just don’t see the nutritionally related conditions we used to.” PHC

PFMA Timeline

1970	The Pet Food Manufacturers Association was established comprising of 4 members Market value = £100 million, Market volume = 470, 000 tonnes Dog Population 5 million, Cat population 4.25 million
1971	Brand varieties were introduced
1972	3 day week introduced to save electricity
1973	Can rationing – UK joined the EEC, PFMA joined the European Pet Food Manufacturers Association (FEDIAF)
1974	The US National Research Council (NRC) published their first recommendations on the nutritional requirements for cats and dogs.
1975	The first thesis was published on the amino acid requirement for adult mature dogs. Dog population = 5.7 million, Cat population = 4.5 million Manufacturers begin to introduce 'life - stage' diets, starting with the puppy diet.
1976	The Joint Advisory Committee on Pets in Society (known as the Pet Advisory Committee (PAC)) was formed to examine the role of companion animals in society and encourage responsible pet ownership
1979	Conservative Government Elected The Pet Health Council (PHC) was formed to promote the health and welfare of companion animals The Society for Companion Animal Studies (SCAS) was established to research the benefits to humans of animals and the scientific nature of the bond that develops between them
1980	Dog population = 5.6 million, Cat population = 4.9 million 'Life-stage' products for other pet species at other stages in life become available.
1981	The first zinc requirement values were established for cats- zinc is fundamental in over 200 bodily processes, including the immune system, skin and coat condition and cell growth.
1982	Taurine , an amino acid only found in materials of animal origin, was found to be crucial for the healthy functioning of a cat. Taurine is vital for aspects of metabolism , eye sight, cardiac function, bile formation and reproduction. The first specific legislation for pet food was introduced – the Feedstuffs Regulations- covering labeling additives and contaminants. Research established the sulphur- containing amino acid requirement of puppies. These amino acids are essential for both growing and adult dogs
1984	Research confirmed that protein requirements for adult cats were higher than in other species. Protein is essential for many aspects of body structure and function.
1985	Dog population = 6.3 million, Cat population = 6.1 million NRC Guidelines for nutrition of dogs were revised
1986	NRC Guidelines for nutrition of cats were revised
1987	PFMA launched a campaign to remove VAT from pet food and highlight the injustice of the tax to government
1988	National Pet Week (NPW) was established to promote responsible pet ownership, PFMA is a founding member.
1989	The PFMA responsibly adopted a voluntary ban, ahead of legislation, on the use of specified bovine offal's (SBO) in pet food, in the wake of BSE

PFMA Timeline

<p>Dog population = 7.4 million, cat population = 6.8 million</p> <p>The government incorporated the PFMA voluntary ban on SBO's into legislation</p>	1990
<p>The Animal By Products Order was introduced which defined the ingredient and materials permitted for use by industry, and required manufacturers to be registered</p>	1992
<p>The cat population exceeded the dog population for the first time</p>	1993
<p>Dog population = 6.6 million, cat population = 7.2 million</p>	1995
<p>The European Union banned the export of farmed beef from the UK when the UK government announced a possible link between BSE and nvCJD in humans.</p> <p>UK legislation brought pet food labeling into line with Europe</p>	1996
<p>First Labour Government in 18 years</p> <p>The government introduced XAP legislation which implemented additional stringent controls on beef-based products</p>	1997
<p>The EU announced the end of the UK beef export ban</p> <p>Dog population = 6.7 million, Cat population = 7.7 million</p>	1999
<p>Foil packs are introduced to the pet food market.</p> <p>The PFMA comprised 65 members, with market value of £1,473.8bn and a volume of 1,296,700 tonnes per annum. PFMA launched their first website.</p>	2000
<p>Dog population = 6.1 million, Cat population = 7.5 million</p>	2002
<p>Dog population = 6.8 million, Cat population = 9.6 million</p>	2004
<p>PFMA launches 'Petsercise' with PHC a new initiative to promote pet and owners health by increasing the number of activities they do together.</p>	2005
<p>NPW becomes National Pet Month (NPM) due to great success.</p> <p>Work starts on the review of the FEDIAF nutrition guidelines for pet food manufacturing.</p> <p>The latest version of the NRC guidelines for dogs and cats is published.</p>	2006
<p>The PFMA comprised 51 members, with market value of £1641.5bn and a volume of 1,267,900 tonnes per annum. PFMA launches new contemporary website (www.pfma.org.uk), logo and extranet.</p>	2007
<p>PFMA take on the secretariat role of PHC.</p> <p>PFMA produces findings of an independent survey on current pet populations in the UK.</p> <p>Dog population overtakes cat population</p>	2008
<p>PFMA launches their Obesity Campaign and White Paper.</p> <p>Cat and Dog population back to level pegging estimated at around 8 million each.</p>	2009
<p>PFMA comprises 60 members, with a market value exceeding £2bn.</p> <p>In celebration of PFMA's 40th anniversary various 'ambitions' for 2020 are launched relating to pets and the environment, responsible pet ownership, pets and the elderly and the benefits of prepared pet food.</p> <p>Dog population around 8 million, Cat population around 8 million</p>	2010
<p>Dog and Cat population remain around 8 million each.</p> <p>PFMA brings together the key UK pet organisations including charities and trade bodies to create a new signposting website for teachers and pet owners to find education resources - www.peteducationresources.co.uk</p>	2011

Pet Food Market Data Survey

PFMA conducts an annual market data survey. Members submit figures on the amount and types of pet food they supply to the UK pet food market. These figures are provided confidentially to an independent third party who collates the results on behalf of participant members. A group of PFMA members then review the figures, and reach a consensus on the size and shape of the various markets for pet foods in the UK.

2011 Total Market Data

The pet food industry in the UK continued to grow in 2011 in terms of value and seemed not as strongly affected as other sectors affected by the economic climate consumers were faced with. Value rose by 1% in 2011, bringing it to £2.14bn.

The value of the **Dog Food** market, in comparison to previous years, continued to show steady growth in 2011 - there was 1% growth in value. This is in despite of a minor decrease in volume. The dog food market in the UK is now worth £1,071m.

The **Cat Food** market saw no change in volume, but the same growth in value of 1% as the dog food market. The cat food market was valued at £918m in 2011.

The **Small Animal** pet food market (for rabbits, guinea pigs and rodents) is small in comparison



to the dog and cat market, but it showed the strongest growth of any of the major markets. Value was up 2% to £67m.

It should be noted that these 'totals' reflect a re-basing of the estimate of the size of some markets, so that they are not directly comparable with the figures given in the 2010 report.

2011	Volume	Value	Volume	Value
	000 tonnes	£m	% growth	% growth
Dog	767	1,071	-1%	1%
Cat	410	918	0%	1%
Small animal	81	67	0%	2%
Total (all pets)	1,263	2,135	-1%	1%

It should be noted that where market value figures are shown in the report, these refer to consumer spending exclusive of any VAT that may apply to each product.

Pet Food Market Data

Prepared dog food market

The prepared dog food market is broken down as follows:

All wet food £329 million (1% growth on 2010)

Dry complete £486 million (1% growth on 2010)

Mixers £25 million (-3% fall on 2010)

Treats £231 million (4% growth on 2010)

Prepared cat food market

The prepared cat food market is broken down as follows:

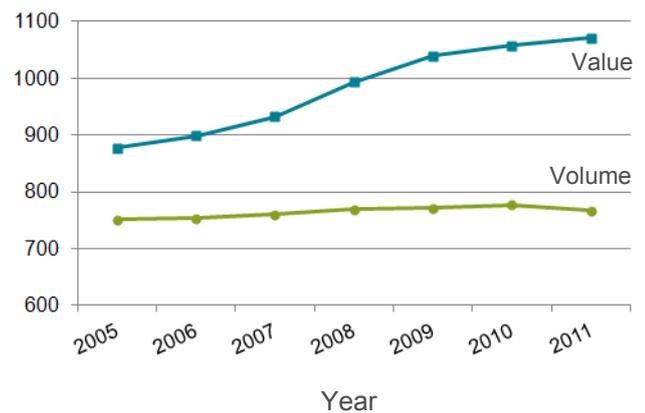
Wet single serve food £491 million (2% growth on 2010)

Wet multi-serve food £140 million (-6% fall on 2010)

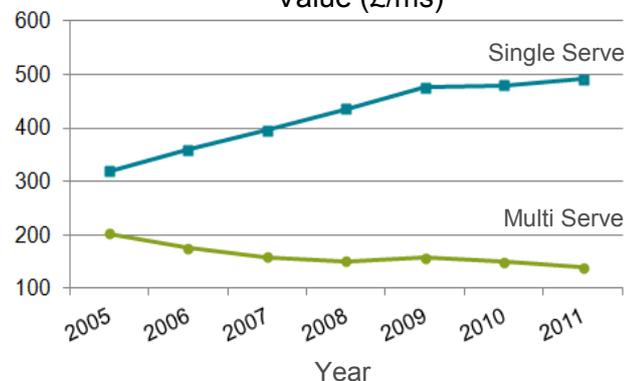
Dry complete £234 million (1% growth on 2010)

Treats £53 million (24% growth on 2010)

All Prepared Dog Food
Value (£/ms) and Volume (000 tonnes)



Wet Cat Food
Value (£/ms)



Market Trends

Some of the long-term trends towards health-consciousness in the pet-food buying public were noted to have been continuing, even while there were downward price pressures in many markets. These trends apply to most pet food markets, but dog and cat food in particular. Examples include:

- Increased demand for provenance of product
- Some growth in organic products
- Growth in products for specific life-stages
- Growth in health-improving products, including joint-care and obesity.

Further statistics, including historical data, are available on the PFMA website

www.pfma.org.uk

Dog Market

Dry Complete dog food has maintained its dominance of the **Dog Food** market, but has not grown its share relative to **Wet Dog** food. **Wet Dog** food, once the most popular type of dog food has been in relative decline for many years, as **Dry Complete** has taken substitutional growth.

Cat Market

A dramatic change in the success of different packaging formats and food types has been seen in recent years. **Single-serve** wet cat food continued to outgrow **Multi-Serve**, but the most dramatic area of growth was in **Treats**, which grew 24% in 2011, following growth of 19% in 2010.

Further statistics, including historical data, are available on the PFMA website:
www.pfma.org.uk.

The UK Pet Population 2012

Each year PFMA commissions new research into the UK pet population conducted using face-to-face interviews, on a representative sample of the UK population.

Figures from this research are then published within this Annual Report and also on the PFMA website along with previous research.

In the UK today dogs and cats remain the most popular pets (excluding fish) and there are currently around 8 million of each living in our homes. Small furry pets such as rabbits, guinea pigs, hamsters, rats and mice are also very popular - UK pet owners care for about 3 million in total.

The UK fish population stands at over 40 million in 2012. It is estimated that over 20 million fish are kept in indoor tanks and that over 20 million fish are kept in ponds.

Around 8 million dogs

Around 8 million cats

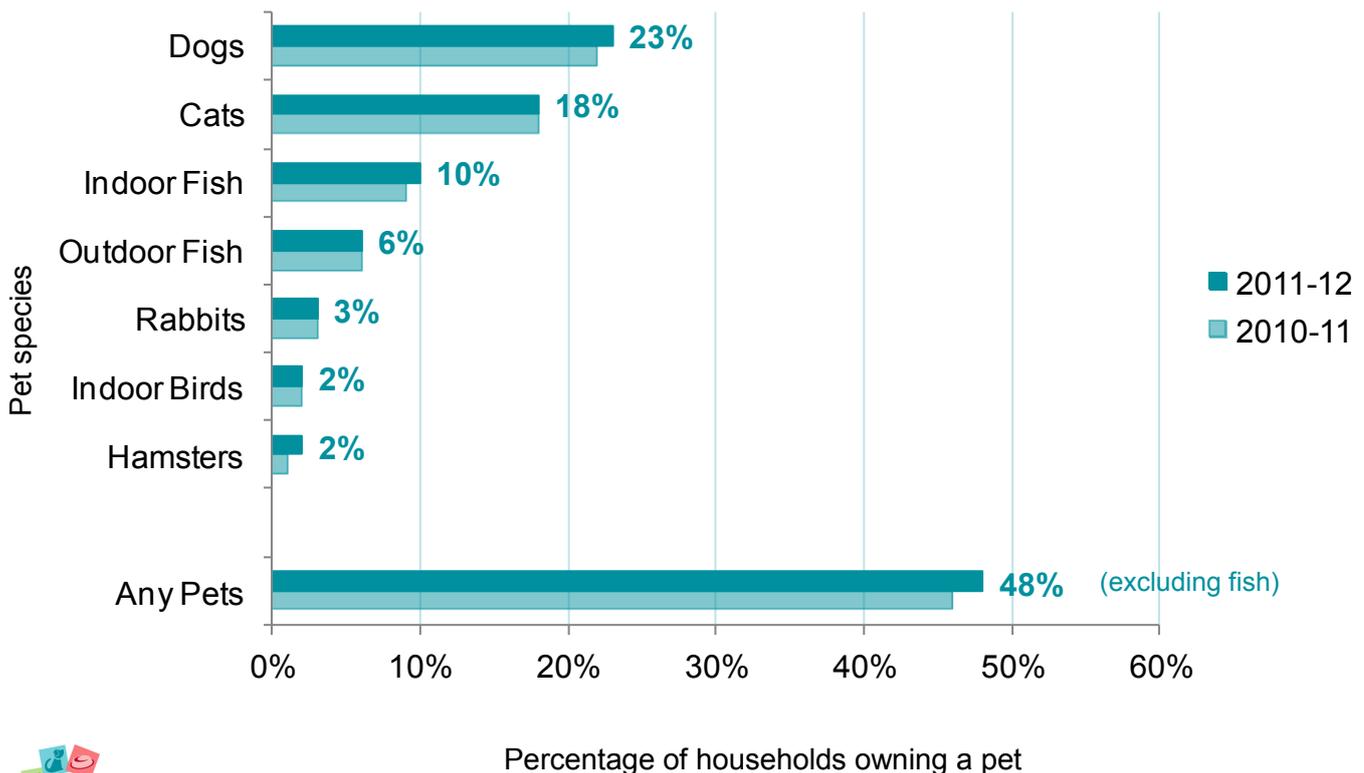
Around 3 million small furry animals, including rabbits

Around 2 million birds, including caged, fowl and pigeons

Around 2 million other pets, including exotic pets, horses and insects

Percentage of Households Owning Pets

In the UK today approximately **48%** of households own a pet (excluding fish), that's about 13 million households. The graph below shows the percentage of households that own particular pets.



Pet Care Education Research

Press Release - New research confirms the importance of pet education

As the findings are released, the UK's animal welfare charities collaborate and launch a new website with all their resources in one place.

Two new surveys conducted by the PFMA among 2,500 adults and 400 teachers confirm the need to teach about pets in schools. 89% of adults, 78% of primary teachers and 70% of secondary teachers all agree that it is important to teach responsibility through learning how to care for pets. The adults surveyed thought it was more important to teach younger children to care for pets than to teach them about sex education and money management. Unfortunately the research among teachers revealed that caring for pets is not currently taught at 60% of primary and 85% of secondary schools.

To highlight the importance of pet education, the PFMA helped establish the Education Alliance, a collaboration of the UK's key pet charities and organisations including Blue Cross, PDSA and RSPCA. To make teachers' lives a little simpler, this group launched a new website of resources www.peteducationresources.co.uk. This is a unique and free website giving teachers and anyone with a love of pets, access to all their resources in one place. The Education Alliance is united by a belief that children and young people should be educated both about caring for animals and the importance of providing for an animal's Five Welfare Needs.

The website's interactive map allows users to find pet establishments that they can visit as well as organisations that will come to schools to do demonstrations: these were rated as the best methods of teaching about pets by the teachers surveyed. As 74% of the schools currently teaching about pets do so through conventional classroom-based lessons, rather than through trips or demonstrations, the website also provides links to interesting resources and lesson plans that make learning about pets fun.



Teachers have welcomed this new resource, with 68% of primary teachers surveyed agreeing they are likely to use an educational website such as this. Debbie Lavelle, a teacher at St Vincent's Primary School in London, says: "Trying to organise a trip or outreach is always time-consuming and it is great that all the resources are accessible from one website, saving me from having to search individually."

www.peteducationresources.co.uk will help those 64% of schools not teaching about pets at all engage with pet education. But the Alliance believes further work must be done. They are concerned that the current Curriculum Review is putting the current opportunities for teaching children about pets at risk, so they will be lobbying for a 'thread' of pet welfare education throughout the curriculum so children understand how they should care for pets, and why they should do so.

"We know that education from an early age is key to achieving our objectives of responsible pet ownership, which is why PFMA initiated the Education Alliance to work on collaborative projects, created

www.peteducationresources.co.uk

and why the alliance will continue to work together to improve pet education in the UK."

**Michael Bellingham,
Chief Executive of PFMA,**

The research was carried out for PFMA in February 2012 through online interviews by TNS (2500 adults over the age of 16) and Research Interactive (200 primary school teachers; 201 secondary school teachers)

Education, education, education

PFMA hosted an education symposium in February 2011 as a forum for organisations involved in animal welfare to collaborate on valuable education work. The symposium was successful in generating ideas with twenty organisations attending, including Blue Cross, Dogs Trust, PDSA, Wood Green, The Kennel Club, RSPCA, NOAH and the BVA. PFMA hosted another two meetings to determine joint projects before creating working groups to move these projects forward.

One of the key areas for collaboration highlighted in the first Education Symposium was the need for pet welfare education to be taught as part of the National Curriculum. There are opportunities to teach about animal welfare issues within the current curriculum but there was concern that the current review of the National Curriculum could reduce or remove these opportunities completely which would be of detriment to both animal welfare and society as a whole. So, the Education Symposium members, having formed a group called the Education Alliance, worked together to create a presentation for the Associate Parliamentary Group for Animal Welfare (APGAW) in February 2012. This argued for a 'thread' of animal welfare education to be established throughout the curriculum providing continuous learning and reinforcement for all students by revisiting the Five Welfare Needs. With the support of APGAW, the group hopes to present their case to education ministers.

Five Welfare Needs

1. *Suitable living conditions*
2. *Appropriate diet*
3. *Expression of normal behaviour*
4. *Living with, or apart from other animals*
5. *Protection from pain, suffering, injury & disease*



As previously mentioned, the group has been worked on another exciting venture:

www.peteducationresources.co.uk, an independent website, which identifies educational resources and opportunities, such as school visits or animal education centres, in the user's local area through a searchable map and directs them to online educational resources split into different categories from 'Early Years' to 'Website Fun' from relevant pet organisations. The website contains all pet education resources from organisations such as the Blue Cross, PDSA, PFMA, NOAH and BVA under one roof, making it easy for teachers, parents and anyone interested in learning more about animals to find the right resources.

Through both of these projects, we hope to see more and more children learning about pets and how to look after their needs because it is important to us all that pets are kept happy and healthy by responsible owners.

PFMA Supports Pets For Life

PFMA sees great value in the work of SCAS (Society of Companion Animal Studies) 'Pets for Life' campaign which seeks to encourage UK housing providers to implement responsible pet policies with a particular focus on housing for older people. Recent studies into mental health and well-being in later life have identified pet ownership as an important factor in promoting good physical and psychological health. However, only 40% of homes have recognised the benefits of interaction with pets in improving social interaction and reducing isolation. PFMA continues to support SCAS in the second stage of its campaign: the development and promotion of the Pet Care Kit – a practical tool kit for care homes implementing a pet policy.



Parliamentary Lunch

PFMA held its annual parliamentary lunch in December 2011. Hosted by Sir Roger Gale, a small number of select MPs including Lord Redesdale, Therese Coffey, Tracey Crouch, Mary Creagh and Huw Irranca-Davies joined members of the PFMA to discuss the latest developments in the pet food industry and the pet environment more generally. Topics under discussion included pet food labelling and the importance of starting responsible pet ownership education at a young age.

Visit to Brussels

In October a mission to Brussels was undertaken by a small group from PFMA including the secretariat and a number of Committee Chairs. The intention was to give an overview of how the various institutions function and interconnect. One visit was made to the European Parliament to meet three UK Members of European Parliament and sit in on a Plenary Session of the Parliament. Further visits were also made to the Commission and to the UK Permanent Representation. PFMA took the opportunity to meet with other relevant stakeholders including the European Pet Food Association, FEDIAF and the European Feed Manufacturers Federation, FEFAC based in the city.



Working with Pet Organisations

Recognising the many and varied roles pets can play in our life, the PFMA works with voluntary organisations, charities and associations to help encourage responsible ownership and promote animal welfare to allow everyone to benefit from animals in our society. PFMA is a trustee of the National Pet Month charity and a member of the Pet Health Council, Pet Advisory Committee, Society of Companion Animal Studies and the Associate Parliamentary Group for Animal Welfare (APGAW).



National Pet Month

Under the banner 'Happiness is time with your pet' National Pet Month 2011 was another brilliant year for the charity. There were over 300 events registered on the site and over 530 event packs sent out. Once again we saw huge diversity and imagination from the event holders with schools, pet retailers, vets, local authorities and pet lovers getting involved. There were also Blue Cross tea parties, Canine Partners bluebell walks and Cats Protection talks during the Month.

2011 saw National Pet Month enter the world of social media through Facebook and Twitter. This has been a good way for us to keep in touch with all those involved in National Pet Month and is a great forum for sharing National Pet Month experiences.

The Pet Nose Day schools art competition encouraged children to get in touch with their creative side and make a mask of their favourite pet. More people came to the National Pet Month site from Times Educational Supplement website than from any other site, while schools papers First News and Primary Times were amongst the educational publications covering the Month, showing National Pet Month's impact in schools.

A photographic competition was run in conjunction with Your Cat and Your Dog, called 'Pets in Love' it celebrated the love between people and their pets to tie in with the Royal Wedding. The 'Pin the Tail on Dog' competition was once again very popular at Crufts.



National Pet Month extends its thanks to our 2011 sponsors – Royal Canin and Companion Care Vets.

While many of the events held during National Pet Month raise funds for local animal charities, the charity is also about raising awareness of how pets makes peoples' lives better, and how we can repay the pets we love by looking after them responsibly.

National Pet Month 2012....07th April - 07th May

The theme for this year's event is 'Your pets and you: a winning team' and we will be encouraging people all over the country to team up with their pets to get happy and healthy in 2012!

There are lots of fun events already in the pipeline from competitions to many local activities and this year we visited the Education Show at the NEC in Birmingham to talk to teachers about National Pet Month and how they can get on board.

"Keep in touch with what's on in your area by looking on our website. We are also planning some great competitions too. National Pet Month is an opportunity for us all to learn more about responsible pet care so we can enjoy our pets and make a winning team for many years to come." Phil Sketchley, chairman of NPM

Pet Health Council

PFMA is a member of the Pet Health Council and has provided the secretariat since 2008. PHC is a unique organisation that handles issues related to pet and human health promoting the message that pets are good for people. It provides a resource to the public as well as the media with a wealth of spokespeople who can comment on a range of subjects from the health benefits of pet ownership to caring for your pet.



The expertise comes from a broad membership of pet and human health professionals including:

- British Veterinary Association (BVA)
- Society of Companion Animal Studies (SCAS)
- National Office of Animal Health (NOAH)
- Association of Pet Behaviour Counsellors (APBC)
- Royal College of Nursing (RCN)
- Royal Pharmaceutical Society of GB (RPSGB)
- PFMA
- PDSA
- Pets As Therapy
- Pet Care Trust

Since PHC integrated with National Pet Month together they have continued promoting, informing and advising on the health and welfare of pet animals in the interest of both pets and people. Visit the PHC website to find out more www.pethealthcouncil.co.uk

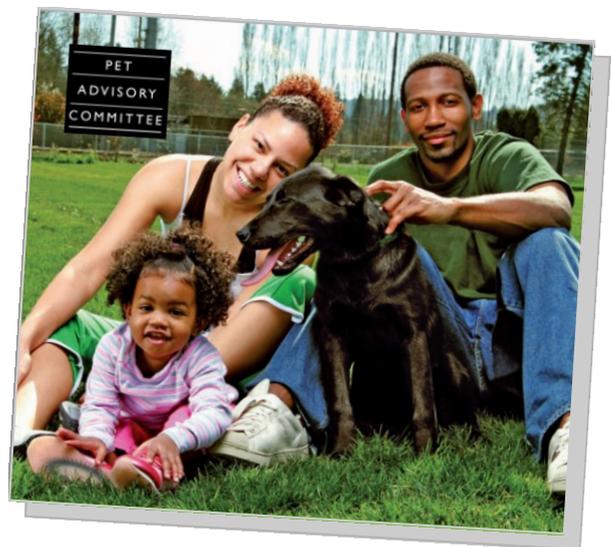


Pet Advisory Committee

The Pet Advisory Committee continues its key role of lobbying on issues affecting pets and pet owners. 2011 has seen PAC welcome a new Chair, Tracey Crouch MP for Chatham and Aylesford. As a former political advisor to the committee, Tracey was familiar with its work and delighted to take on the role; she notes the

“Remarkable achievements over the course of its 38-year history, notably, almost all of the committee’s proposed amendments to the Animal Welfare Bill were adopted by Parliament in 2006. Moreover, the implementation of a UK-wide network of dog wardens was yet another fantastic accomplishment.”

In 2011, PAC continued to identify and lobby MP’s with an interest in animal welfare whilst redeveloping the PAC website www.petadvisorycommittee.org.uk, which includes advice and guidance on matters such as pet management for housing providers, and forming new partnerships with information facilitators such as the Citizen’s Advice Bureau.



Members of the Pet Advisory Committee include:

- Blue Cross
- BSAVA
- BVA
- Cats Protection
- Dogs Trust
- FAB
- The Kennel Club
- NOAH
- OATA
- Pet Care Trust
- REPTA
- RWF
- Scottish RSPCA
- PFMA



Stakeholder Relations

PFMA has strong links with voluntary organisations, charities, associations and government. PFMA works with these groups to encourage responsible pet ownership and protect the interests of the pet food industry. PFMA's lead in forming the Education Alliance made up of pet charities and associations has strengthened this relationship with double the number of stakeholders completing our Stakeholder's Questionnaire in 2012 than in 2010.

Stakeholder's identified PFMA's role as providing 'information and education', 'advice to members', 'advice to the public', 'negotiating with the government' and 'maintaining industry standards'. 89% of respondents rated the PFMA website's ease of use and content as 'good' and 92% of respondents thought that the new education site www.peteducationresources.co.uk would be 'a useful tool'.

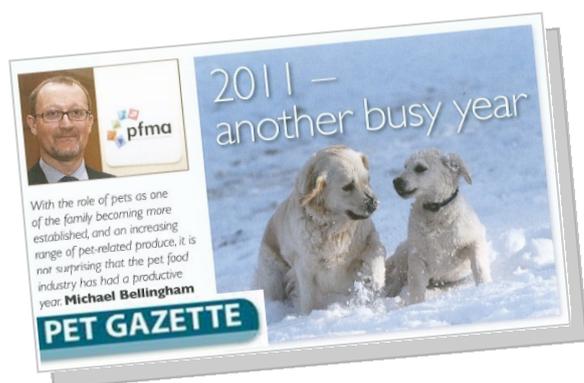
To improve communications with stakeholders PFMA has introduced a quarterly newsletter for anyone with an interest in the work of PFMA. The first newsletter was sent out in February 2012 and results were encouraging with 36% of recipients reading the email, 20% clicking on a link within the email and even some shares on Twitter and Facebook.



Media Relations

PFMA is always ready to respond to media enquiries related to pet food nutrition as well as proactively advising the public on pet food related issues through articles in magazines such as Your Cat and PFMA's monthly column in Pet Gazette. Having our voice represented in the media is important to PFMA as it allows us to highlight the fundamental role of prepared pet food in responsible pet ownership.

PFMA has responded to many media enquiries in 2011 from the pet trade press providing comment to Pet Business World, from the hobby press providing comment to Your Dog, Your Cat and Dogs Today and from national press giving information and our opinion to features in the Financial Times Magazine and on regional BBC Radio and BBC Radio 4.



PFMA Veterinary and Nutrition Committee

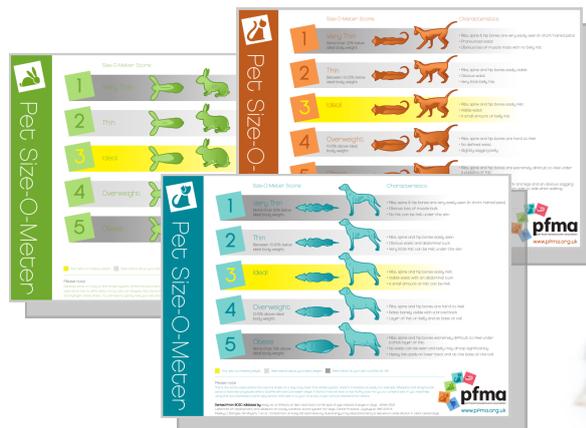
The PFMA Veterinary & Nutrition Committee is a valuable asset for the Association. The group includes representatives from member companies with veterinary or animal nutrition expertise. Having a large group of active members from a variety of companies, as well as a close relationship with UK veterinary schools, ensures that any information we provide is independent and up-to-date. Activities of the Committee include using shared expertise to respond to any public and media enquiries related to pet food and pet nutrition, regular meetings and presenting at major veterinary events.

In November 2011, as part of the work conducted by the Veterinary & Nutrition Committee to examine current nutrition and health related issues, PFMA conducted a survey on obesity and nutrition at the London Vet Show which saw responses from vets and veterinary nurses.

PFMA Veterinary & Nutrition Committee visited Nottingham and Liverpool Veterinary Schools to meet with the faculty and students, and also helped coordinate the 2011 Breeders Symposium, in conjunction with the Kennel Club in November 2011 at the Royal Veterinary College (RVC) London.

The PFMA Pet Obesity Campaign, launched in 2009, is now into its third year. The main focus of the campaign has been to distribute the Pet Size-O-Meter (a body condition chart for cats, dogs and rabbits) to re-homing centres and veterinary practices. The Pet Size-O-Meters which are essential for the pet owners are included in adoption packs and presented at the veterinary practices. Nearly 100,000 copies were provided by PFMA in 2011.

Pet Size-O-Meters are available for download from the PFMA website, www.pfma.org.uk



Nutritional Guidelines

FEDIAF, the European Pet Food Association, produces nutritional guidelines for manufacturers to follow when producing complete and complementary foods for cats and dogs. These guidelines which detail the nutritional needs of cats and dogs at varying life-stages are a review of the NRC Guidelines (the US based National Research Council) and other existing science on pet nutrition. The document is looked at on a regular basis to ensure it includes the latest knowledge and is peer reviewed by independent nutrition experts throughout Europe.

The guidelines are available for download at: www.fediaf.org.uk

PFMA continues to promote this document to UK industry including both members and non members to ensure a high standard of pet food for our nation's pets.

PFMA Small Animal Committee have been working alongside fellow pet nutrition experts from around Europe to develop additional guidelines - Nutritional Guidelines for Small Animals. The first of this series will be Nutritional Guidelines for Rabbits, developed with support from academics from Edinburgh University Vet School. PFMA expect the guidelines to be published later in 2012.

Pet Food Legislation

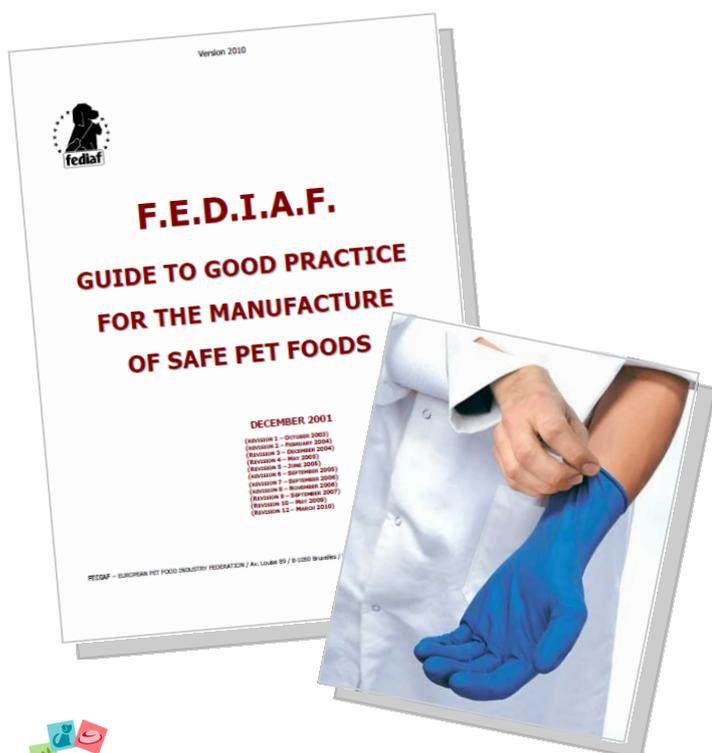
The pet food industry is subject to stringent legislation to ensure safe products of high quality. There are over 50 regulations that cover all aspects of the pet food cycle from ingredients and traceability to labelling and claims. For example, the legislation covering pet food ingredients stipulates that manufacturers must only use raw materials from animals that have passed veterinary inspections as fit for human consumption.

Most of the legislation applicable to pet food originates from the EU, mainly in the form of Regulations.

Pet food manufacturers are in a unique position because there are few pet food specific regulations. Legislation covering pet food (the raw materials used or finished product) has either been intended for products for the human food chain or for farm animal feed.

This provides great security with regard to the raw materials - for example the restrictions on residue levels of veterinary substances in meat, and pesticide limits in cereal products.

In addition, the industry has adopted a number of Codes of Practice that support the regulations and in some cases even exceed legislative requirements.



Feed Hygiene Regulation

The EU Feed Hygiene Regulation ensures that food safety is considered at all stages in the production of pet food. The rules laid down in the Regulation were previously covered by a number of pieces of legislation. The Regulation consolidates the requirements for HACCP and the hygiene of facilities, storage, and personnel, and record-keeping.

The Feed Hygiene Regulation encourages development of community guides to good practice, their purpose being to ensure compliance with the hygiene and HACCP requirements of that Regulation.

In 2007 the EU Commission formally recognised the FEDIAF Guide to Good Practice for the Manufacture of Safe Pet Foods.

Pet Food Labelling

The Marketing and Use of Feed Regulation (Regulation (EC) Nr 767/2009) harmonises the labelling of pet food (and feed for food producing animals) in all 27 EU member states even further than the previous legislation.

The Marketing Regulation took 5 years of preparation. During this time the industry played an active part in lobbying the UK authorities to ensure that a practical and proportionate approach was taken. Unfortunately the devil is often in the detail, and it took a further 12 months of work to produce on a common sense interpretation for a number of provisions laid down in the Regulation – The FEDIAF Code of Good Labelling Practice for Pet Food.

PFMA endeavours to ensure that manufacturers are up-to-date on the ever-changing views on how to label pet food in the future.

The New Pet Food Label

The Marketing Regulations introduced additional legislation that affected pet food labels from 2011. Members were therefore required to make changes to their product labels.

New pet food labels following the regulation include many of the same provisions as laid down in the previous legislation. There is still a requirement for a product name and the statutory declaration to be labelled clearly legible and indelible.

Some new additions, prescribed by the new Regulation, include section headings such as 'Composition', 'Additives' and 'Analytical Constituents' which aim to improve readability and information provision for the consumer.

The consumer will also find additional information on the additives that have been used in the pet food product. As an industry it is important to explain to consumers that additional additive information does not necessarily mean that more additives have been used to produce the pet food than before the label change.



Labelling Code

On 8 December 2011 a reference to the FEDIAF Code of Good Labelling Practice for Pet Food was published in the Official Journal of the European Union.

The Code is intended to be used as a practical guide to the labelling and marketing of pet food and should be read in conjunction with relevant EU legislation. The Code not only provides details on how to label products in line with the Marketing Regulation, but also provides information on claims and off-pack communications.

The Code covers three basic functions of product communication - consumer information on product use, control and enforcement, retail and marketing.



Regulations Covering Animal Based Raw Materials

The Animal By-Products Regulation applies to any animal based raw material used in pet food. The legislation lays down the health rules concerning animal by-products not intended for human consumption (Regulation (EU) 1069/2009, and its Implementing Regulation, Regulation (EU) 142/2011).

The Regulation defines the various kinds of animal by-products according to their risk potential, which leads to the exclusion of any animal raw material that could potentially be a risk to human or animal health.

A number of agencies, such as the Food Standards Agency and the Animal Health Veterinary Laboratories Agency (AHVLA) are responsible for the enforcement of the Animal By-Products Regulations, which cover classification, movement, storage, processing (including the licensing of premises) and documentation of any animal based raw material.

Furthermore, the Animal By-Products Regulations provide a clear classification of animal by-products, emphasising that only by-products from animals passed as fit, but not intended for human consumption can be used for the production of pet food. This is in line with previous legislation in this area and confirms the long-standing voluntary raw material policy of PFMA members.

PFMA members only use materials from species that are generally accepted in the human food chain, such as beef, lamb, poultry, pork, fish, shellfish, rabbit and game.

The Animal By-Products Regulation has recently been updated. The revised Regulation is based on the well-respected principles of the previous legislation reflecting changes in operations and addressing practical issues. During the last 3 years of discussions, PFMA has supported the UK Authorities by providing feedback and suggestions during the negotiation process, to ensure that provisions are proportionate and appropriate with regard to the risk to human and animal health.



Legislative Measures to Eradicate Animal Diseases

The manufacture and export of pet food containing animal based raw materials can be severely affected by an animal disease outbreak (Avian Influenza, Foot and Mouth Disease). PFMA keeps a close eye on any developments in the UK and other EU member states.



FEDIAF

PFMA is a founding and active member of FEDIAF, the European Pet Food Federation. FEDIAF was formed in 1970 and now includes 20 national pet food associations with more than 450 companies. It promotes the views and interests of the pet food industry before EU institutions and other international bodies, aiming at a legislative framework for the production of safe, nutritious and palatable pet food.

FEDIAF also support the development of technical Guides to Good Practice for the industry. Working groups consisting of technical experts perform the main work for these guides. Both the FEDIAF Guide to Good Manufacturing Practice and the FEDIAF Code of Good Labelling Practice for Pet Food are recognised by the EU and a link to it is included on their official website.

In a similar way, FEDIAF has compiled nutritional guidelines for complete and complementary pet feed for dogs and cats. FEDIAF was not only able to attract a number of nutritional experts with practical experience in the industry, but was also fortunate to receive feedback from a number of eminent academics working for leading universities.

This strong engagement by the industry in providing information and support via a trade body is beneficial not only for manufacturers but also for their customers and ultimately for pets. By aiming to establish guides to best practice in various areas, the industry can lead the way and assure quality, safety and animal well being beyond the legal framework.

The European pet food industry provides a range of carefully prepared products to help ensure long, healthy and active lives of million pets in Europe, which are cared for in around 70 million pet keeping households.



FEDIAF AGM 2012

Each year members of FEDIAF take it in turns to host the Annual General Meeting. In 2007, it was the UK's turn and last year we were invited to Krakow, Poland.

This year's FEDIAF AGM will be held in Vienna, Austria from the 31st May – 1st June.

FEDIAF

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The PFMA Annual Report is available to download from the PFMA website:
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