

The background of the cover is a stylized world map composed of numerous small, colorful dots in shades of blue, green, yellow, and purple. Two large, thick arrows are overlaid on the map: a green arrow pointing towards the top right and a purple arrow pointing towards the top left. The overall aesthetic is clean and modern.

A BRAVE NEW WORLD 2018: PFMA'S PET FOOD VISION AND ANNUAL REPORT



CONTENTS

Chairman's Welcome	02
Brexit: An Update On Our Journey	04
Our Three Year Pet Food Vision	06
Chief Executive's Update	08
Membership Benefits	10
Education on Pet Nutrition	12
Veterinary Professional Research	14
Pet and Industry Data	16
PFMA Mission Statement	18
Members List	19
PFMA Secretariat	20

CHAIRMAN'S WELCOME: PFMA'S PET FOOD VISION



I am delighted to introduce the PFMA Annual report for 2018.

I feel extremely proud to have helped steer PFMA on its first steps of an eventful journey through the referendum to leave the EU and its many repercussions.

Along the way we have engaged members, formed important strategic alliances and, as a result of a lot of hard work, I believe we are in a strong position to lead the industry forward as the process continues to unravel.

As Michael Bellingham quite rightly said in his recent Sky News interview, the nation's pets didn't vote for Brexit, but they will still expect their favourite foods to be available after March 2019, and our lobbying efforts have focused on ensuring safe pet food of the highest quality and maintaining a competitive industry. You will be able to read more about our Brexit priorities and milestones on pages 4 and 5 of this report.

Last year we talked about the 'Brexit' related work of the Association and our 'Business as Usual' activity. Whilst we do still have these streams, they are gradually becoming more intertwined, so much so that Brexit in effect is becoming business as usual! This has compelled us to think differently and creatively, and as a result we have some exciting new projects and partnerships in the pipeline.

PFMA has become a proud co-sponsor of the All Party Parliamentary Group for Animal Welfare (APGAW), alongside the RSPCA. The welfare of farm and companion animals is important to us and we are delighted to join other thought leaders in this area, advising and shaping policy.

This March, also sees the launch of our three-year Pet Food Vision. There are 3 pillars underpinning PFMA and the pet food industry – animal welfare, nutrition, safety and standards. We will put the spotlight on a different pillar each year.

In 2018, we commence our Pet Food Vision focusing on animal welfare. With the Brexit negotiations ongoing and the Draft Animal Welfare Bill 2017 working its way through Parliament, the time is right. You can read more about PFMA's Pet Food Vision on page 6.

Much of our work could not happen without the support of our 81 member companies. Many have representatives actively involved in our committees. Once again, I would like to thank all our members for their ongoing commitment and contributions.

I would also like to give my personal thanks to the secretariat – to Michael, Nicole, Lana, Sarah, Lynn and Fritha for their tireless efforts on behalf of us all. They are an excellent team, fully committed, highly motivated and are great people to work with.

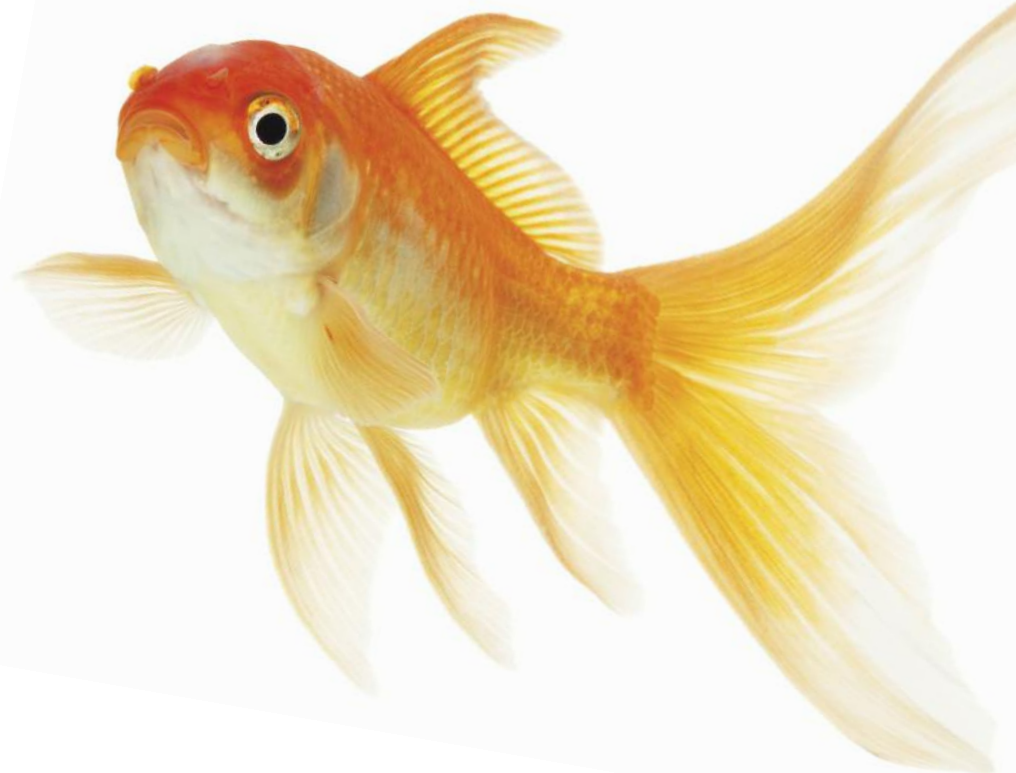
As my tenure as Chairman comes to a close and I pass the baton over to Tony Parkinson (Managing Director – Town & Country), whom I thank for being an extremely supportive Vice Chairman, my thanks go to the team and to all members who have made my Chairmanship a privilege, an honour and a pleasure in what has proven to be a very challenging period.

The Pet Care Sector is renowned for coming together to make things happen and I am very proud to be part of that. PFMA works together with a broad range of organisations, from other professional bodies to welfare charities. We look forward to continuing this journey stronger than ever.

Wishing you a successful 2018.

A handwritten signature in black ink, which appears to read 'Peter Kersh'. The signature is fluid and cursive, with a long horizontal line underneath.

Peter Kersh – World Feeds



BREXIT: AN UPDATE ON OUR JOURNEY

Our members manufacture a wide range of products for pets of all types and range from major multinationals with manufacturing sites worldwide to small companies operating only in the UK. 90% of them are SMEs, many of which trade outside the UK, primarily within the EU single market. Our members are dedicated to providing the best quality pet foods made to high welfare standards and wish to continue to do so, no matter what the outcome of the current negotiations and future trading arrangements with the EU.

PFMA Brexit Priorities

ANIMAL HEALTH & WELFARE



We have some of the strongest feed safety and animal welfare standards in the world; these must be maintained and not undermined by imports with lower standards.

Vets play a vital role in maintaining these standards. 85% of official state vets, and 30% of all vets, come from the EU. Concerns about the veterinary workforce need to be addressed.

DELIVERING SAFE PET FOODS

WORKFORCE



The pet food industry employs a workforce of 100,000 people across the EU that benefits the UK greatly.

MARKET ACCESS



Avoid barriers to trade and promote access to new markets. Currently 80% of members export to the EU, 60% to the rest of the world. Half of members import raw materials or finished goods worldwide.

ENSURING A COMPETITIVE INDUSTRY

RAW MATERIALS



We use a significant amount of animal by-products, surplus to the human food chain. This gives value to farmers who would otherwise have to dispose of that high quality material.

80% of our raw materials are from the UK. We must continue to support domestic farmers to ensure a reliable supply of safe, high quality and high welfare raw materials.

HIGH QUALITY INGREDIENTS

REGULATORY REGIME



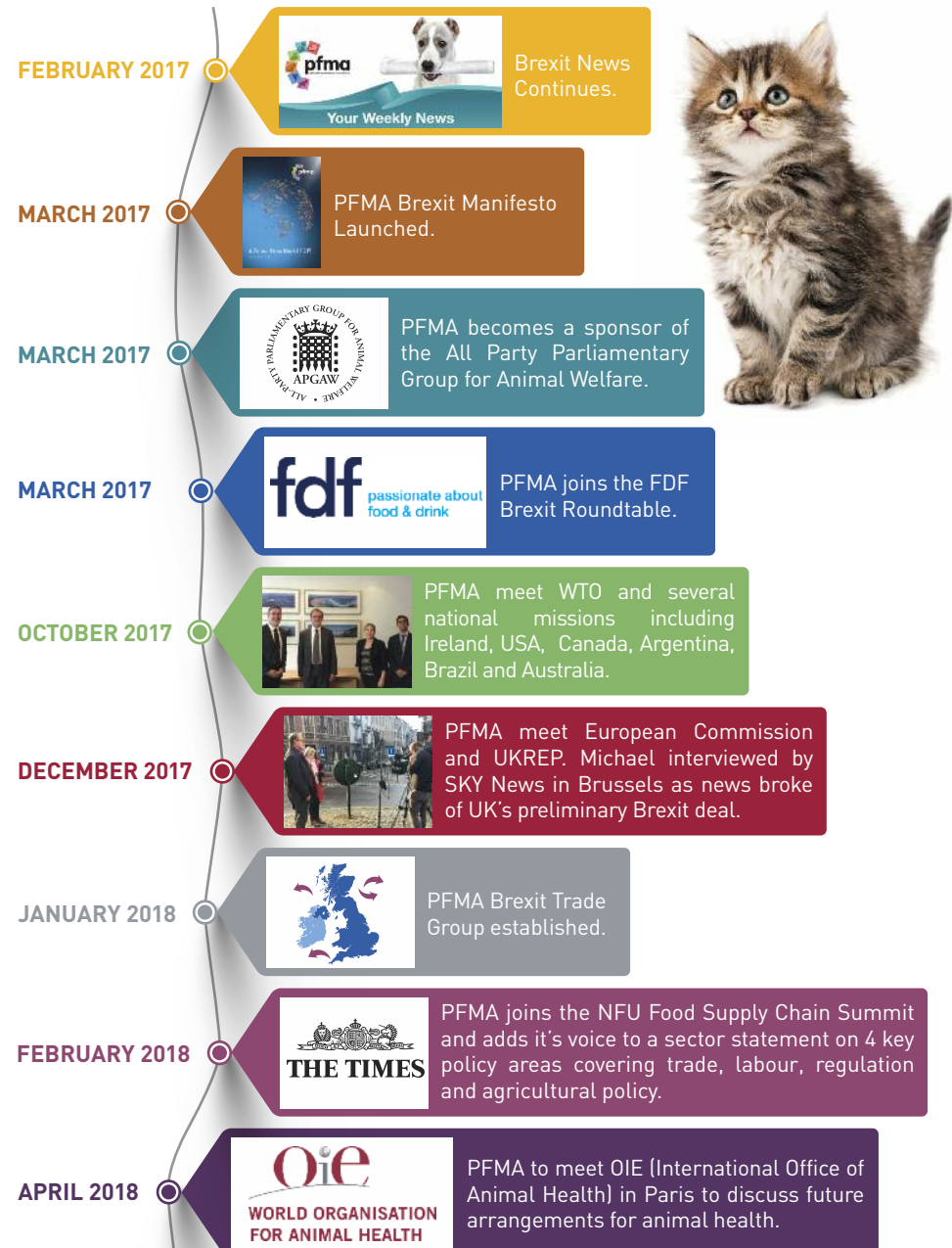
It is critical to keep legislation aligned with the EU. This will allow continued trade with Europe without unnecessary and costly barriers to business.

100% of animal feed and welfare law currently originates from the EU. We do not want any reduction of these high standards which help to keep our pets and products safe.

MAINTAINING HIGH STANDARDS

PFMA Brexit Journey Milestones

PFMA is engaging in discussions at all levels to inform Government of issues and opportunities.



PFMA LAUNCHES ITS THREE-YEAR PET FOOD VISION

The core purpose of PFMA is to place pets at the centre of everything we do. In 2018 we launch the PFMA Pet Food Vision, which focuses on 3 core pillars underpinning our work: animal welfare, nutrition, safety and standards.

These pillars are areas of ongoing activity, however our Pet Food Vision spans a three-year period and each year we will throw the spotlight on a different aspect of our work.

We are excited to realise our ambitious pet food vision and look forward to sharing our progress over the next three years



THE THREE CORE PILLARS AT THE HEART OF OUR VISION



ANNUAL REPORT 2017: CHIEF EXECUTIVE'S UPDATE

Here are some highlights from 2017 – to give you a snapshot of our continued focus on education and communications.



NATIONAL PET MONTH

National Pet Month celebrates its 28th year. PFMA is a trustee of the charity, which works to promote responsible pet ownership.

Pet Care Aware is a new initiative from the National Pet Month team to bring pet professionals and pet friendly organisations together to help spread the responsible pet care message throughout the year.



ALL PARTY PARLIAMENTARY GROUP FOR ANIMAL WELFARE (APGAW)

PFMA becomes co-sponsor of the All Party Parliamentary Group for Animal Welfare (APGAW), alongside RSPCA.



PET POPULATION COVERAGE

Our pet population data (particularly the increased cat population story) following the AGM in 2017, secured widespread coverage in most national newspapers – with a circulation of over 12 million.

ESVCN Congress 2017

EUROPEAN SOCIETY OF VETERINARY COMPARATIVE NUTRITION ANNUAL CONFERENCE

The annual conference for the European Society of Veterinary & Comparative Nutrition (ESVCN) was held in the UK from 20-23 September. The event showcased the latest research in small animal nutrition, among other species, in the form of oral and poster presentations. On the last day of the conference, PFMA held a seminar, looking at the hottest topics in pet nutrition with panel speakers and delegates participating in discussions.

RAW GUIDELINES

Launching new sector guidelines for Raw Pet Food manufacturers to promote best practice.



EDUCATIONAL MATERIAL

Increasing our offering of educational material to 15 pet food factsheets, five nutrition posters (one interactive), two calorie calculators and five Pet Size-0-Meters, which are all available free to download from our website.



MEDIA COVERAGE

Branded media coverage reaching over 33 million and worth over 1.15 million. This is a 38% value increase and over 50% circulation increase on the previous year, cementing PFMA as the leading voice on pet food nutrition.

Membership increased

10%↑

(from 74 to 81 members in Jan 2017)



LONDON VET SHOW STAND

For the eighth consecutive year PFMA held a stand at London Vet Show, engaging with and receiving feedback from veterinary professionals. With a record number of survey entries, the PFMA team were able to collect qualitative and quantitative data on obesity trends, nutrition related health issues and what is expected from the industry. PFMA also distributed a large number of their free educational materials.

EUROPEAN PET FOOD FEDERATION

PFMA hosted the AGM of the European Pet Food Federation (FEDIAF) in Manchester this June with a highly relevant theme – 'A Global Pet Food Industry United'



We look forward to working with you in 2018.

Michael Bellingham

Michael Bellingham
PFMA Chief Executive

MEMBERSHIP BENEFITS

- PFMA is dedicated to representing its members and promotes the responsible manufacture of quality, nutritious products.
- Knowledge is shared online, via committee meetings, in topic papers and tailored articles for trade and hobby press.
- PFMA also lobbies government on issues and monitors the wider media environment.



PFMA membership is valued for these reasons:



PFMA delivered in 2017

Information Resource



16 Brexit newsletters



400+ member queries answered



45 editions of pet themed 'Your News' for members



10 dedicated working groups & committees



35 working group meetings



Dedicated customs & trade group



Annual pet data report



Annual pet food market report (exclusive to data scheme participants)



Dedicated online portal for members



2 calorie calculators



3 new pet food factsheets and 1 poster

Lobbying



Dedicated Brexit Task Force



PFMA member & MP networking lunch



39 meetings with government bodies



Co sponsor of All Party Parliamentary Group for Animal Welfare (APGAW)



Member of the Canine Feline Sector Group (CFSG)



Member of FEDIAF (the European pet food federation)

Networking and Credibility



Annual Convention & AGM



272 PFMA branded media mentions



19 pet food articles produced for trade and hobby press

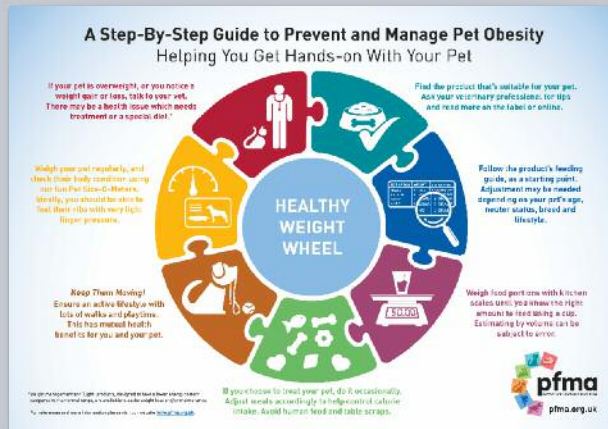


Training sessions and workshops (London Vet Show, British Veterinary Nursing Association Congress, Glasgow University Pet Food Seminar)

EDUCATION

Education on pet nutrition is a key part of PFMA's work. We work hard to produce evidence-based and non-branded materials for pet professionals and owners, covering all aspects of pet food and nutrition. These include visually engaging posters, factsheets, calorie calculators and a short animated film demonstrating how pet food is made.

Pet obesity is still a big concern and to tackle this in 2017 PFMA launched an obesity poster and interactive web-page 'Get Hands on with your Pet'.



Other Weight Management Tools and Factsheets

- Online calorie calculators for adult dogs and cats to estimate how much food they should eat daily, based on their body weight and activity level.
- Pet Size-O-Meters for dogs, cats, rabbits, guinea pigs and pet birds are still incredibly popular with **over 8000 views** this year.
- Food Diary, Weight Log and Posters about the pets and human food leftovers.



PFMA now has a range of 15 factsheets and this continues to evolve. **Our Top three: Raw Feeding (1999 views), Calories (1197) and Puppy Nutrition (1137 views) in the last year.**

Nutrition Events

In order to promote good pet nutrition, PFMA has organised events or presence at numerous conferences and seminars including:

- Glasgow University Pet Food Seminar, March 2017
- ESVCN Congress – Behind The Scenes of Pet Food Industry, Sep 2017
- London Vet Show, November 2017



Shown above: Michael and Sarah joined by Dr Andrew Miller, Chair of Veterinary & Nutrition Committee' at London Vet Show stand

Online Resources and Shop

All these tools and copies of presentations are downloadable and viewable from www.pfma.org.uk/factsheets-and-tools.

This advice from the voice of the industry has proven very popular with **over 11398 page views** last year (**an increase from 5800 the previous year**). Our online shop now enables members to order larger quantities of printed resources.

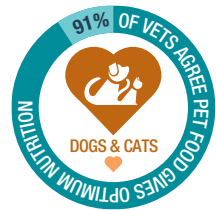


VETERINARY PROFESSIONAL RESEARCH

PFMA is involved in London Vet Show every year and surveys the veterinary profession for their latest insights on pet nutrition and health. This year 215 attendees took part (over 30 more than last year). It is also an opportunity for us to share our latest educational materials. More detail about all PFMA research can be found in our Pet Data Report.

Latest findings include:

Viewpoints on Commercially Prepared Pet Food



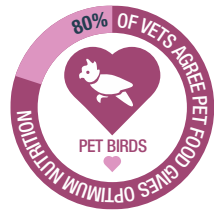
91%

agree that commercially prepared pet food provides optimum nutrition for cats and dogs when fed correctly



76%

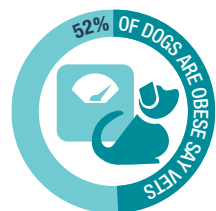
agree that commercially prepared pet food provides optimum nutrition for small mammals when fed correctly



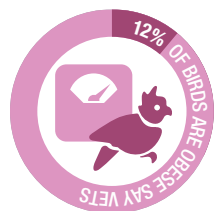
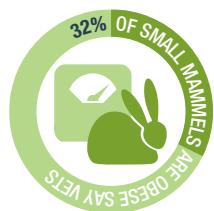
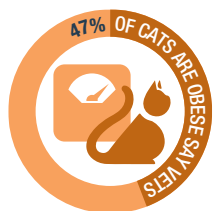
80%

agree that commercially prepared pet food provides optimum nutrition for pet birds when fed correctly

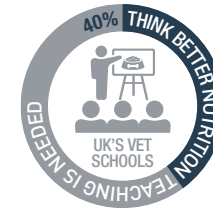
Perceptions of Obesity Levels in the UK



Vets believe that **52%** of dogs, **47%** cats, **32%** small mammals and **12%** birds are obese.



Nutrition Training at UK Vet Schools



40% believe nutrition training at vet schools is inadequate.



Veterinary professionals identified their preferred training formats for enhanced nutrition teaching:



77%

voted for face-to-face training



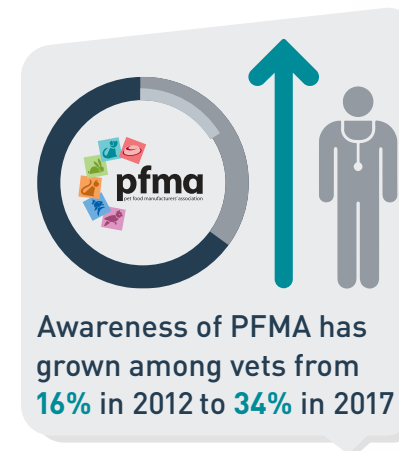
66%

would like online resources



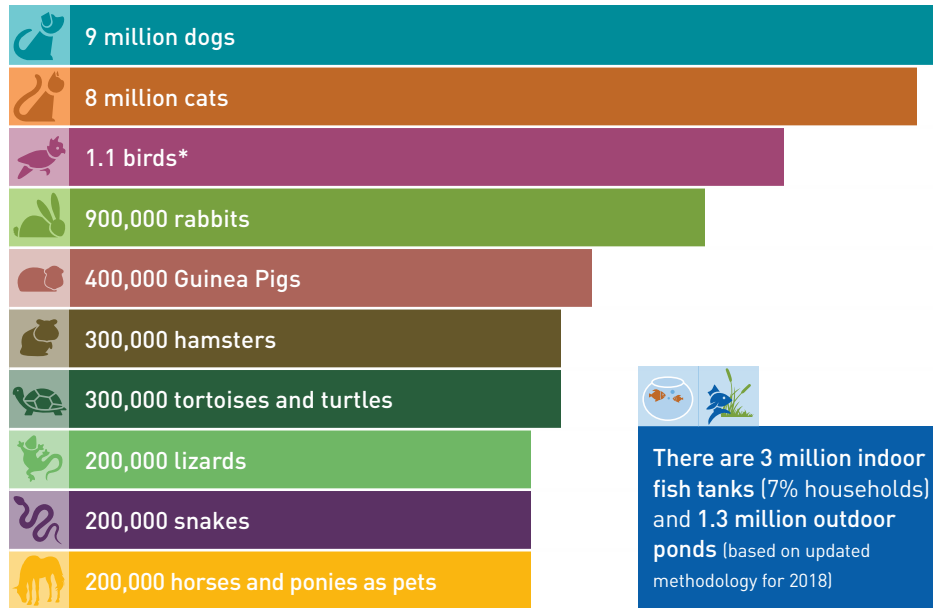
60%

requested generic educational posters and leaflets



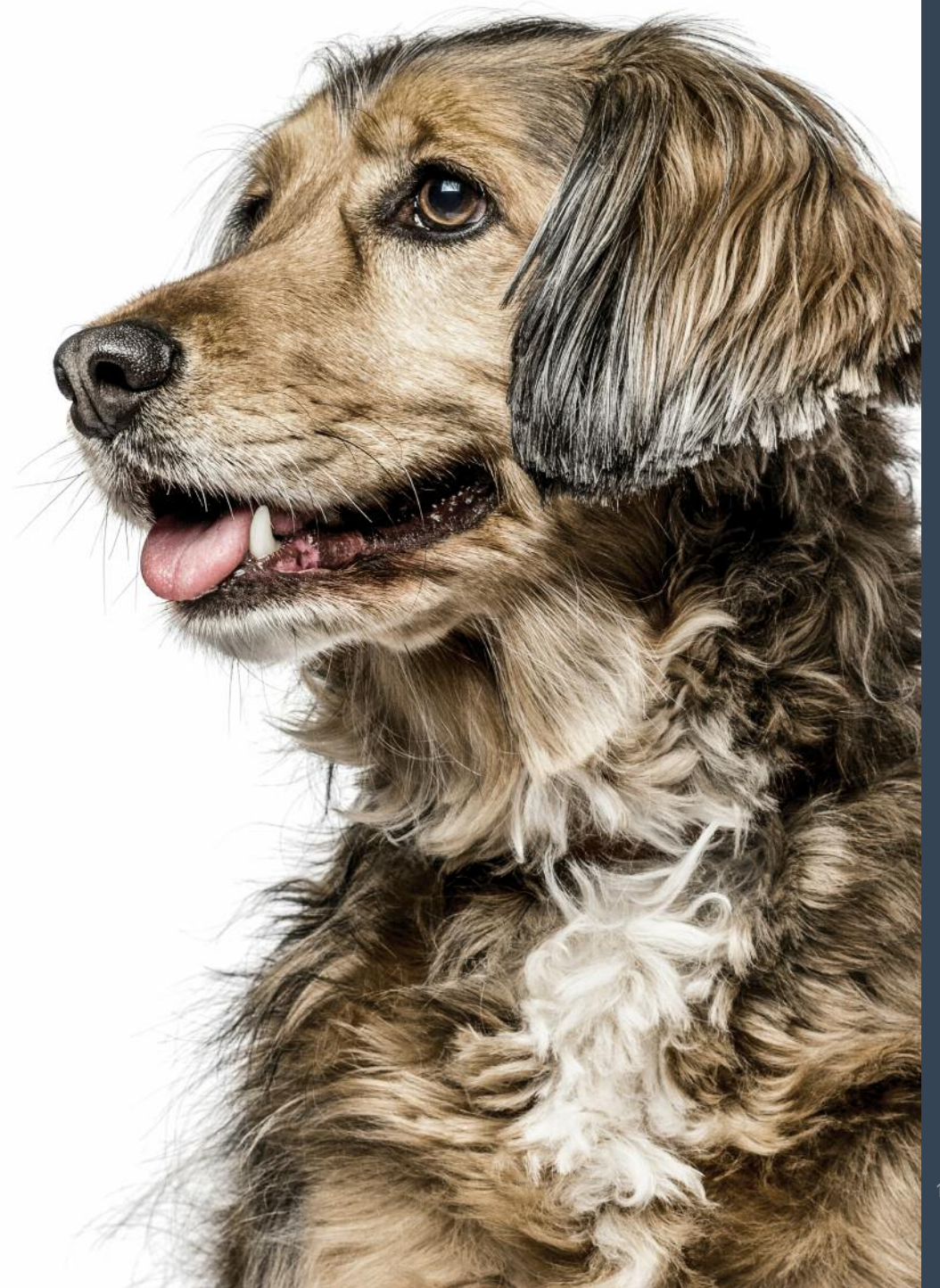
PET AND INDUSTRY DATA

Every year PFMA gathers Pet Food Market Data and commissions Pet Population Research. Here is a snapshot of our findings and more detail can be viewed in our 'Pet Data Report'.



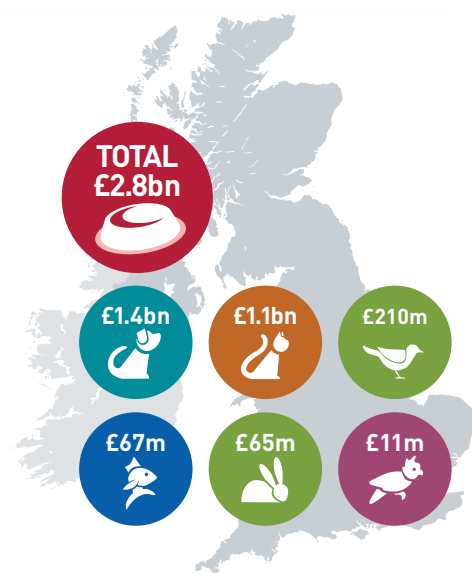
Note: All figures are rounded to the nearest 100,000

* Domestic fowl, indoor birds and pigeons



13 million households have pets

PET FOOD MARKET DATA
 PFMA is the principal trade body representing the UK pet food industry. Our 81 member companies account for over 90% of the UK market.



MISSION STATEMENT

PFMA aims to create a credible and responsible industry by placing pets at the centre of everything we do. 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, the public and others, as well as playing a lead role in forming opinions in Europe through the European Pet Food Federation (FEDIAF).



PFMA MEMBERS

Representing 90% of UK Pet Food Market

Alphabetically listed:

Alba Protein (Omega)
Alltech
Beaphar
Benyfit Natural
Billy and Margot
Bob Martin
Burgess Pet Care
Burns Pet Food
Butcher's Pet Care
C&D Foods
Caledonian (Mosspark)
Cambrian
Cotswold Raw
Countryside Products
Crown Pet Foods
Devenish
Dietex International
Dodson & Horrell
DSM
Dupont
Durham Animal Feeds
Eden Holistic Pet Foods
Feedwell Animal Foods
Fish4Dogs
Fold Hill Foods
GA Petfood Partners
Gel Systems
Gladwell & Sons (Copdock Mill)
Grove Pet Foods
Happy Pet Products (Healthy Paws)
Henry Bell
Hill's Pet Nutrition
Honey's Real Dog Food
Inspired Pet Nutrition
Interpet
John Pointon and Sons
Johnsons Veterinary Products
Johnston & Jeff
Leander International Pet Foods
Lily's Kitchen
Mackle Pet Foods
Mark & Chappell Ltd
Marches Natural (Field Fayre)
Marriages
Mars Petcare
Millies Wolfheart
MPM Products
Natural Instinct
Natural Vetcare (NAF, Greencoat)
Natures Menu
Nestle Purina PetCare
Nutriment
Oscar Pet Foods
Pacific Proteins
Pedigree Wholesale (Pet Products)
Pet Food UK
Pets Choice
Premier Pet Nutrition
Propet
Provimi (Cargill)
Regency Feeds (Green Tech)
Rettenmaier (JRS)
Roger Skinner
Rolf C Hagen
RSPB
Sarval
Spectrum Brands
Suffolk Group
Supreme Petfoods
The Dog Treat Company
The Innocent Pet Care Company
Thompson and Capper
Topspec
Town & Country Petfoods
TPMS Animal Feeds
Trouw Nutrition GB (Frank Wright)
United Fish Industries
Wafcol (Armitages)
Westland Horticulture
Wolf Tucker
World Feeds

PFMA SECRETARIAT

MICHAEL BELLINGHAM

Chief Executive

Michael joined PFMA in 2004. Before that he worked in both retail and food trade associations in the UK. In 2000 he moved to Brussels to run a European cereals association, which focused on international trade issues. Michael has responsibility for putting into action the PFMA strategy as directed by the Executive Committee. Much of his energy is currently spent on Brexit, and ensuring the best possible outcome for the pet food sector.

NICOLE PALEY

Deputy Chief Executive – Communications & Animal Welfare

Nicole joined the PFMA in 2003 and works alongside Michael shaping the strategic direction of PFMA. Nicole leads on stakeholder engagement and oversees the PFMA internal and external communications, which includes the PFMA Press Office. She participates in the All Party Parliamentary Group for Animal Welfare and the running of National Pet Month. Beyond the UK, Nicole sits on the Communications Working Group of the European Pet Food Federation (FEDIAF).

SARAH HORMOZI

Science and Education Manager

Sarah joined PFMA in 2011 and runs a number of PFMA Committees and Working Groups including Veterinary & Nutrition Committee, Bird and Small Animal Working Groups. Part of her role is to keep abreast of developments in areas such as veterinary and animal nutrition. Collaboration with universities, veterinary bodies and welfare organisations also form an important part of her role.

LANA MORGAN

Regulatory Affairs Manager

Lana joined the PFMA in 2009 and is responsible for all regulatory issues, acting as an intermediary between government and the industry. She represents PFMA to many government bodies including the Department of Environment, Food and Rural Affairs, the Animal and Plant Health Agency and the Food Standards Agency. Lana provides regulatory support and advice to members on a wide range of regulatory topics covering ingredients and production through to labelling and export. Lana runs the technical and regulatory Review Committee.

LYNN INSALL

Brexit & Regulatory Affairs Consultant

Lynn joined PFMA in 2017 to support the Association's Brexit related work. Lynn spent twenty years in regulatory affairs with Food & Drink Federation and has substantial experience in European legislation.

FRITHA FLINT

PR Consultant to PFMA

Fritha has worked with the PFMA team for a number of years focusing on all aspects of communications including event support and website development.

PUTTING PETS AT THE HEART OF EVERYTHING WE DO



Sarah with Lexin



Michael with Tessa



Lana with Pass



Nicole with Hebe



Fritha with Balgie



Lynn with Pumpkin and Twinkle

Also available:
2018 Data Report



6th Floor, 10 Bloomsbury Way
London, WC1A 2SL

T 020 7379 9009

E info@pfma.org.uk

www.pfma.org.uk

Join the conversation at [#UKPFMA](https://twitter.com/UKPFMA) 