



## Background

On 27 June 2019, Defra's Secretary of State, George Eustice, commissioned Henry Dimbleby to conduct an independent review to help the government create its first National Food Strategy (NFS) for 75 years. The purpose of the review was to; address the environmental and health problems caused by the food system, to ensure the security of the food supply, and to maximise the benefits of agricultural technology enhancements.

The newly arrived pandemic forced the initial element of the review to focus on supporting the country through the turbulence caused by the COVID-19 pandemic, and to prepare for the end of the EU exit transition period on 31 December 2020. This was published as Part 1 of the National Food strategy in June 2020.

A year later, in July 2021, part 2 was published. This returned to the original brief and, after a lengthy analysis of how the food system worked in practice, it set out 14 recommendations.

The government committed to responding with a White Paper six months after the review was published. It also asked Henry Dimbleby to review progress 12 months after that.

## The NFS And Pet Food

Perhaps not surprisingly, given the remit, the NFS makes no reference to pet food. Nevertheless, the pet food sector will be impacted directly by a number of the recommendations in the NFS.

Whilst pets have different diets from humans, they make use of the same raw materials. We use the same distribution and sales channels (with the addition of the specialist pet channel) and the end consumer waste goes into the same waste streams. Moreover, the increasing recognition of pets as family members (strengthened during the pandemic as pet numbers grew) means pets and their owner are treating the supply of pet food as just as critical as their own food. This response will therefore address the recommendations on the NFS, but at the same time put forward a number of its own recommendations to address the future needs of the pet food market in the UK.

## UK Pet Food In Numbers

The Pet Food Manufacturers' Association (PFMA) is the collective voice for the UK pet food industry. We represent 100 members which accounts for over 90% of the market.

### Pet Food Market

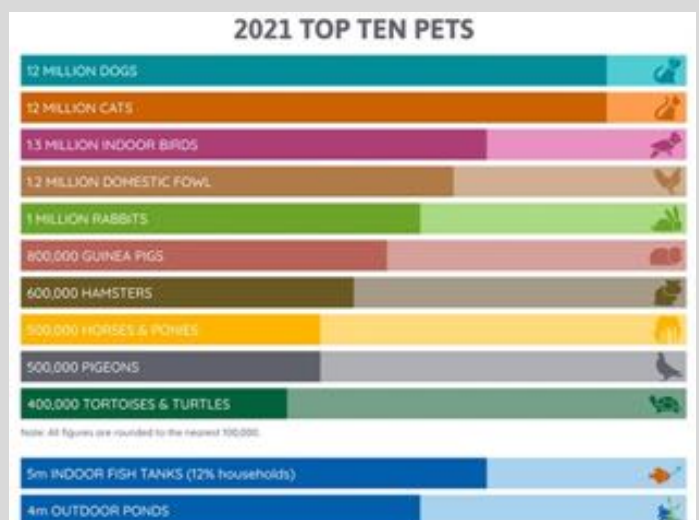
The value of pet food industry in 2020 was over £3 billion. The volume of pet food market around 1.3million tonnes.



If we exclude imported finished and raw materials, the UK pet food industry utilises around 1 million tonnes of UK agricultural produce, roughly split between meat and poultry by products (500,000 tonnes) and cereals (500,00 tonnes). In terms of UK home grown cereals, pet food uses around 2.5% of the total of 20 million tonnes. As a proportion pet food uses even more meat by products, utilising 12% of the total 4 million tonnes (livestock and poultry).

### Pet Numbers

The UK saw a substantial increase in pet numbers during the pandemic. There are now 12 million dogs and the same number of cats. The next most popular pets are indoor birds (1.3 million) and followed by rabbits (1 million). In addition, there are 5 million indoor fish tanks as well as 4 million ponds.



# National Food Strategy – what role do pets and pet food play?

There is no doubt that the recommendations in both parts of the National Food Strategy report are likely to have a significant impact on pets and pet food. On the other hand, one could argue that without pets and pet food, the NFS will in itself be much more difficult to achieve.

## 1. Pets and exercise

a. Pets are widely recognised for the role they play in encouraging and maintaining their owners exercise habits.

## 2. Pets and health

a. Pets, as emphasised during the pandemic, have a critical role in the mental well-being of the human population, impacting people of all ages.

b. Sadly, obesity is as much an issue for pets as it is for people, with research suggesting that 50% of cats and dogs are overweight or obese. Over the last decade, PFMA has been working hard to tackle this issue. Given that over half of UK households own a pet, we believe there is great potential in employing the 'One Health' framework to provide solutions for the prevention and treatment of this condition in people and pets. We recently held a forum on National Pet Obesity Awareness Day and our next step will be to establish a Task Force with experts from the animal and human health sectors.

*"Pets have a critical role in the mental well-being of the human population."*



## 3. Pet food and sustainability

a. Pet food has always played a critical role in the economic viability, as well as the sustainability, of the meat sector. Pet food adds value by taking the parts of the carcass that are not used (unpopular cuts such as lungs, heart etc). Without this, livestock production would be even more challenging economically as the farmer would not only receive no value for those parts of the carcass, they would also have to pay to dispose of them.

b. Pet food plays a similar role utilising by products from cereals production.

c. With a strong emphasis on reducing waste in the NFS, pet food has much it can share with the rest of the food industry on best practice. End consumer waste in pet food is at 1% (WRAP).



*"End consumer waste in pet food is at 1%." WRAP Report*

## 4. Pet food and animal welfare

a. Due to our unique situation in feeding companion animals and utilising farm animal products, pet food companies have long supported positive action to raise animal welfare on both sides of this equation. PFMA co-sponsors the All-Party Parliamentary Group on Animal Welfare (APGAW) and we provide guidance to our members to help them develop corporate animal welfare policies.

b. PFMA has long advocated protecting our high animal welfare standards in any trade deals to avoid undermining UK agriculture. In addition, we would support giving UK farmers incentives to raise welfare standards even higher, such as prioritising research into improving livestock health and welfare.

## A National Pet Food Strategy – PFMA Recommendations:

There is an understandable lack of anything specific in the NFS relating to pet food.

Nevertheless, the pet food sector is of crucial importance in:

- a. supporting UK agriculture,
- b. promoting human health and wellbeing
- c. promoting sustainable use of resources
- d. promoting both companion and farm animal welfare



Whilst pet foods are processed, ingredients are carefully selected to provide the right balance of nutrients in the right proportions. Members formulate their diets in line with the FEDIAF Nutritional Guidelines. By feeding a complete pet food it is akin to having our daily diet formulated by a nutritionist. This takes the worry and hassle out of feeding the nations pets as they are all developed to provide optimum nutrition. In addition, there is a huge range of pet foods to ensure affordability and to cater to consumer preferences.

## PFMA makes the following recommendations for a National Pet Food Strategy:

### Recommendation 1:

#### **We require high welfare, safe, nutritious, sustainably produced ingredients**

The NFS rightly focusses on sustainability in the food chain as well as maintaining and improving animal welfare. Both of these are core principles for pet food manufacturers' and we require this from our ingredients suppliers. Safety in terms of livestock means raising levels of animal husbandry, with the critical benefits of lower need for anti-microbials and higher welfare outcomes. This in turn leads to lower levels of microbiological contamination in meat making it safer to handle for manufacturers using those raw materials, and in turn for pets and pet owners.

Microbiological risks are also critical in plant based raw materials and this is being exacerbated by global warming, for example with increased mycotoxins. Improved safety requires sharing best practice, for example, on grain storage and animal husbandry, close partnership with the veterinary profession, research, and surveillance of mycotoxins etc.

### Recommendation 2:

#### **We require a food system that recognises and values pet food**

The pandemic, for all its significant impacts on human health, had a positive impact on the pet population in the UK. Employees working from home realised they could now get a pet where before they would have not wanted to leave them at home all day. In addition, for those who were suddenly unable to leave their house or go to school or work, getting or keeping a pet was critical to their mental health.

The increase in pet populations has impacted the pet food sector as demand has significantly increased. As a nation we need to recognise this by encouraging farmers to have a regard for pet food as the end product (even if it remains a by-product of the human food sector).

### Recommendation 3:

#### **We encourage research and support for alternative proteins**

With increased pressure to reduce greenhouse gases through the reduction of livestock produced and consumed in the UK, we must recognise the impact that will have on the availability of raw material for pet food production. Our members have already led the way in the innovative use of alternative proteins, such as insect protein. Whilst recognising that cats are obligate carnivores and will always require meat content in their diet (though this could be laboratory grown in theory), most pets are either omnivores or have a solely plant-based diet.

We need to encourage research into alternative proteins that are not only more sustainable but also meet the dietary needs of the various species (including humans) we are feeding into the future. (Supports recommendation 11 in the NFS)

#### **Recommendation 4:**

### **We need pet food to be included in any national action plan dealing with food security**

As the NFS recognises, food security is not simply about increased self-sufficiency, it is a multi-faceted concept that includes protecting supply lines, mitigating the risk of harvest failures globally etc.

Any national action plan dealing with food security needs to take account of the needs of the pets in the UK as food shortages can have a serious impact on pet welfare. For example cats cannot go without protein for long as, unlike with humans and dogs, their livers are not developed to support their bodies for very long.



#### **Recommendation 5:**

### **We require trade agreements which don't undermine our core principles**

In the UK we have some of the highest animal health and product safety standards in the world. This is underpinned by stringent legislation on what raw materials we can use and how pet food is manufactured. It also relies on supervision by official vets and meat hygiene inspectors, as well as safeguards to handle any disease outbreaks.

We must ensure these standards and high animal welfare remain as strong as ever, not only to protect human and animal health, but also to satisfy our UK customers and ensure UK pet food remains highly regarded when we trade globally. (Supports recommendation 10 in the NFS)

#### **Recommendation 6:**

### **We want to ensure a society that recognises and values pets; at work, in housing, with access to open space (eg farmland) and in health care system.**

In the same way the NFS recognises the broader societal role food has to play in the health of the nation, pets should be recognised for the role they play in the health and mental wellbeing of the families they are part of and beyond. This is being increasingly recognised, particularly during the pandemic, but much more can and should be done.

There are many subtle (and not so subtle) barriers to pet ownership including housing, the workplace, the high street, parks and other open spaces. In addition, there is much more that pets can do to enhance the health of the nation, from therapy assistance animals in care homes and the classroom to medical detection animals.

