



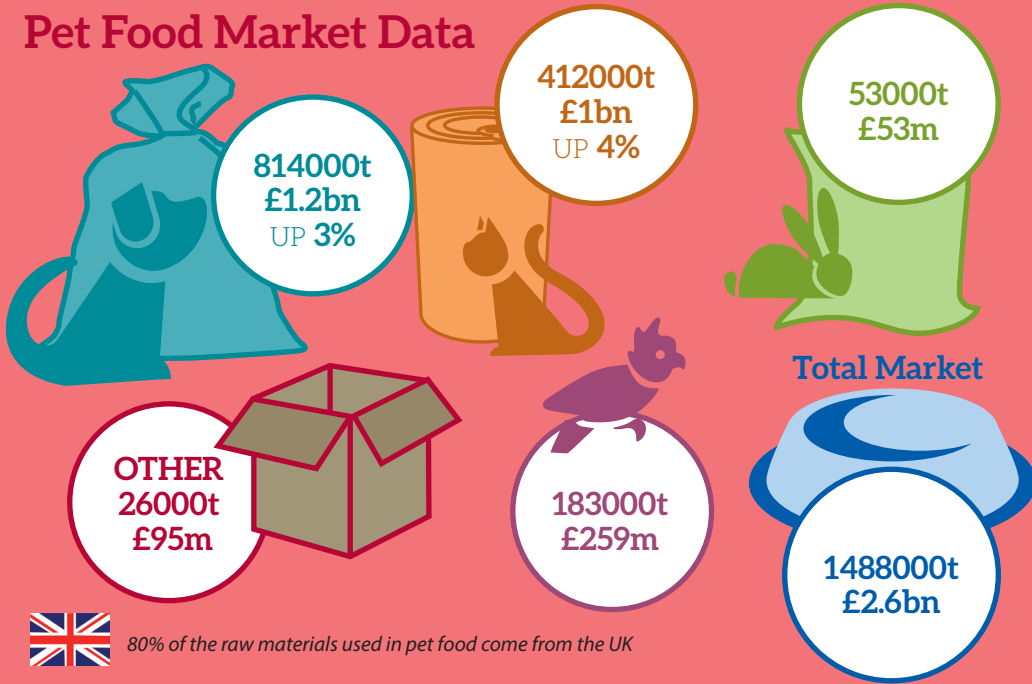
pfma
pet food manufacturers' association

ANNUAL REPORT 2014



PFMA is the principal trade body representing the UK pet food industry. We have over 70 member companies which accounts for over 90% of the UK market. We aim to be the credible voice of a responsible pet food industry.

Pet Food Market Data

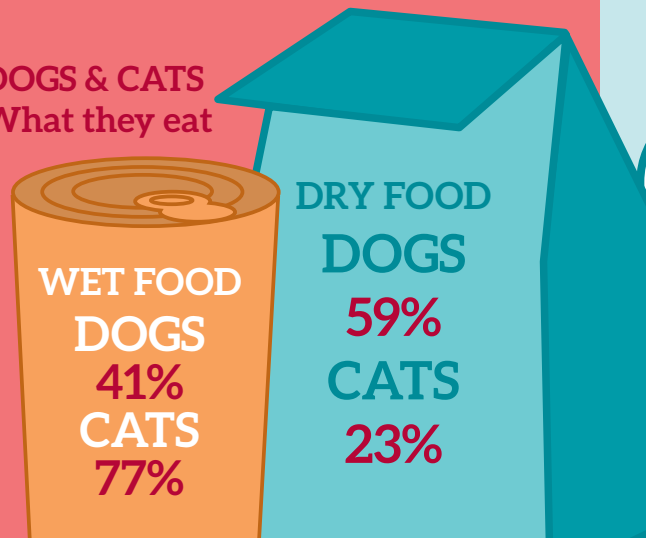


80% of the raw materials used in pet food come from the UK

UK Pet Population



DOGS & CATS What they eat

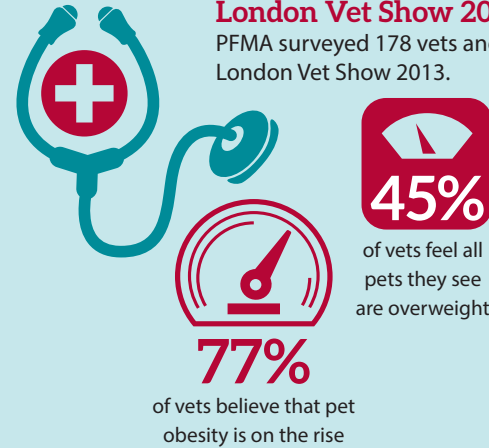


CAMPAIGNS AND DATA

PFMA body condition score charts are known as Pet Size-O-Meters. In 2013, PFMA distributed 192,250 copies of PSOMs to rehoming centres, veterinary practices and other animal charities, to include cat, dog, rabbit and bird size-o-meters.

London Vet Show 2013 Statistics

PFMA surveyed 178 vets and veterinary nurses over the two days at London Vet Show 2013.



Vets consider the root causes of weight gain to be:

- Not following the feeding guidelines: cats (72%), small furrries (60%), dogs (48%) and birds (28%)
- Treating with leftover food: dogs (78%)
- Insufficient exercise, particularly for cats (46%), dogs (44%) and small furrries (35%)

86% of UK vets run obesity clinics and 49% consider these to be successful

Key Findings from the 'Pet Obesity: Five Years On' Report

- 63%** of owners don't know how to check if their pet is overweight
- 68%** of pet owners use 'instinct' when deciding how much to feed
- 48%** of owners are treating more than twice a day
- 93%** of owners say they would be concerned to discover their pet is overweight

'Pet Obesity: 5 Years On' report is available to download from the website

QUALITY, SAFETY, OPTIMUM NUTRITION

- Over 50 pieces of legislation governing the industry
- Five industry Codes of Practice
- There are four board certified veterinary nutritionists in the UK – the pet food industry works with them all
- Latest developments in the pet food industry – nutrition breakthroughs in 2013
 - FEDIAF Nutritional Guidelines for rabbits – details the nutritional needs of rabbits
 - Update to FEDIAF Nutritional Guidelines for Cats and Dogs – for complete and complementary foods

WHAT PFMA DID IN 2013:

PFMA Media Coverage:

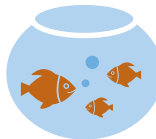
- The press office produced a total of **30** articles on the industry and pet food nutrition
- Reaching an audience of **157,000** pet industry members and pet owners
- **41** pieces of coverage for our pet population & industry statistics (287,000 circulation)

In 2013 PFMA launched three campaigns:

- 1) Feed the Birds – a radio campaign promoting the feeding of wild birds to young urban dwellers, covered by 39 stations
- 2) 'Weigh in Wednesday' – over 200 pieces of coverage, reaching over 127 million including a live segment on *Daybreak*
- 3) National Pet Month (along with fellow trustee NOAH) – over 200 pieces of coverage, over 600 events held and £12,000 raised for 35 animal charities

Website statistics 2013

90,073 visitors
269,418 page views



Visits up **26.73%** on 2012
Page views up **15.66%** on 2012

2013-14 Events

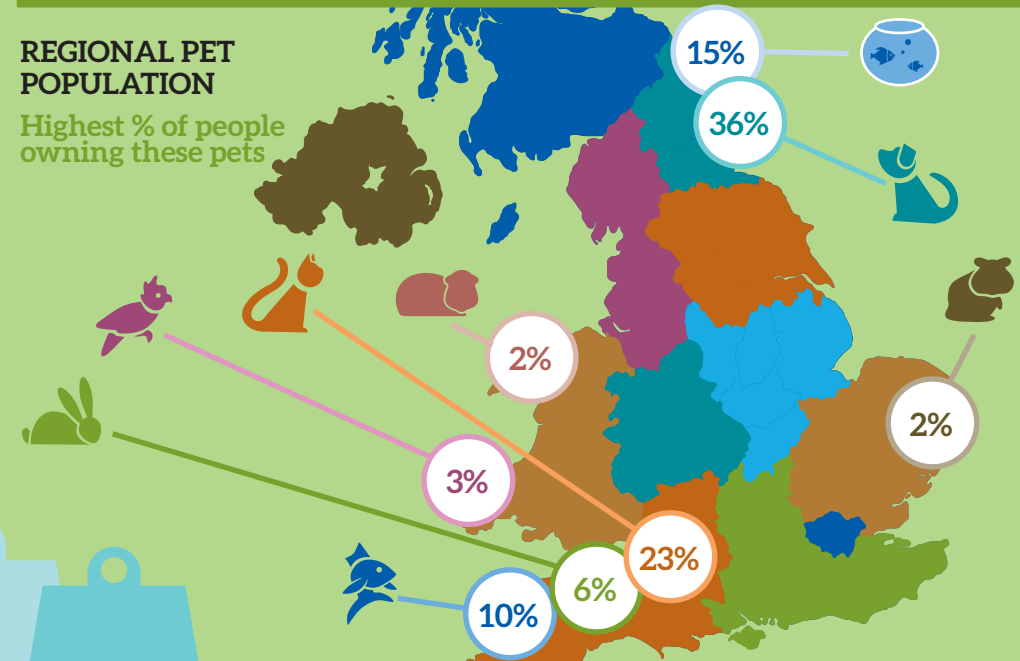
JAN FEB MAR APR MAY JUN
JUL AUG SEP OCT NOV DEC

- APR 2013: National Pet Month opens under the banner 'Your Pets and You: Companions for Life'
- MAY 2013: Cambridge University: Presentation for Veterinary Students on Pet Food Industry and Rabbit Nutrition
- MAY 2013: Nottingham University: Career Event for Veterinary Students – PFMA stand provided career advice
- MAY 2013: 'Weigh in Wednesday' launches with a live feature on ITV's *Daybreak*
- JULY 2013: PFMA wins best Annual Report 2013 at the TAF (Trade Association Forum) Awards
- AUG 2013: 'Weigh in Wednesday' round 2 is held promoting ongoing weight management and good nutrition
- AUG 2013: National Pet Month takes on Scratch Post and Park Bench communities, reaching new Facebook communities of over 100,000
- SEP 2013: PFMA produces a 'How to video' for the Bird Size-O-Meter with Zara Boland
- OCT 2013: PFMA attends the 15th International Companion Animal Welfare Conference (ICAWC) in Barcelona Spain, where over 80 pet organisations from across the world come together to discuss companion animal welfare
- NOV 2013: PFMA hosts a regional meeting for members with a speed networking event
- NOV 2013: PFMA attends the London Vet Show
- JAN 2014: National Pet Month holds a reception at the Kennel Club to celebrate its 25th anniversary
- MAR 2014: PFMA launches its boot camp for pets in Teddington, SW London
- MAR 2014: PFMA releases its 'Pet Obesity: Five Years On' report

From March - December 2014, PFMA will be running its **Get Pets Fit** campaign which will throw the spotlight on good nutrition, healthy feeding and fitness. A highlight will be Weigh in Wednesdays throughout May and we're calling on pet owners and pet care specialists to get involved. You can link with us on Facebook, just search for **GetPetsFit** and visit www.pfma.org.uk for more information and a supporter pack.

REGIONAL PET POPULATION

Highest % of people owning these pets



Get Involved!
Weigh in Wednesday
www.pfma.org.uk

Join our campaign and keep your friend healthy for life

Michael Bellingham, PFMA Chief Executive, highlights key achievements in 2013:

1. Launch of health and well-being campaign – Friends for Life – including the first ever Weigh In Wednesday, which was a huge success. The campaign achieved over 200 pieces of press coverage, including a live segment on ITV's *Daybreak*, highlighting the critical issue of pet obesity.
2. PFMA wins Trade Association Forum (TAF) Best Practice Award 'Publication of the Year'. Our annual report is praised for being easy to understand and browse contents. A downloadable version and limited printed copies make it environmentally friendly.
3. Our European Association (FEDIAF) adopts new Nutritional Guidelines for Feeding Pet Rabbits on 31 May. These were developed as a PFMA initiative, before being carried forward by FEDIAF.
4. PFMA radio campaign, working with the British Trust for Ornithology (BTO), promotes wild bird feeding, particularly to young urban families. The feature is carried by over 39 radio stations.
5. Continued involvement as trustee of National Pet Month, a charity promoting responsible pet ownership, which ran this year under the theme 'Your Pets & You: Companions for Life'.



PFMA: OUR MEMBERSHIP BENEFITS



45 editions of pet-themed 'Your News' sent to members



6 industry newsletters

28



28 working group meetings



59 pet food topic papers



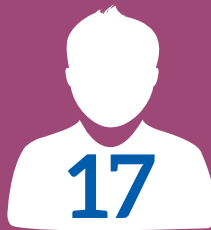
3 members events



250 member enquiries answered



30 industry and nutrition focussed articles produced



17 meetings with government bodies



Chairman's Foreword



Welcome to the PFMA Annual Report for 2014. We have revised the format this year to make it even more graphic in appearance and hopefully easier to get the information you want. You will still find all the most up-to-date information on pet numbers and the pet food market.

Whilst we have seen the UK economy moving slowly out of recession, it has still remained a challenging trading environment. Having said that, the pet food market continues to grow and our latest sales data shows an increase of 2% in value in 2013. The pet food industry is now an impressive £2.6 billion.

Last year we launched our Weigh In Wednesday campaign to promote healthy pets through encouraging owners to properly assess their pets' size and weight. That was a great success and this year we will be focussing on changing pet owners' behaviour. In May we will be launching a pilot #GetPetsFit campaign. Pet experts will draw the community of Teddington together to enhance the lives of their pets. We hope more professionals, carers of animals and communities will join our mission to #GetPetsFit and win the battle against obesity.

John Walgate - Alpha Feeds

PFMA Secretariat

MICHAEL BELLINGHAM *Chief Executive*

Michael joined PFMA in 2004. He has worked in the trade association world for a number of years. Michael looks after the Small Animal and Bird Groups, as well as running the Executive Committee. Michael is also Vice-Chairman of National Pet Month.



NICOLE PALEY *Communications*

Nicole Paley joined the PFMA in 2003. Nicole is the PFMA Communications Manager, managing the media relations and the work PFMA undertakes promoting responsible pet ownership.



LANA OLIVER *Technical & Regulatory*

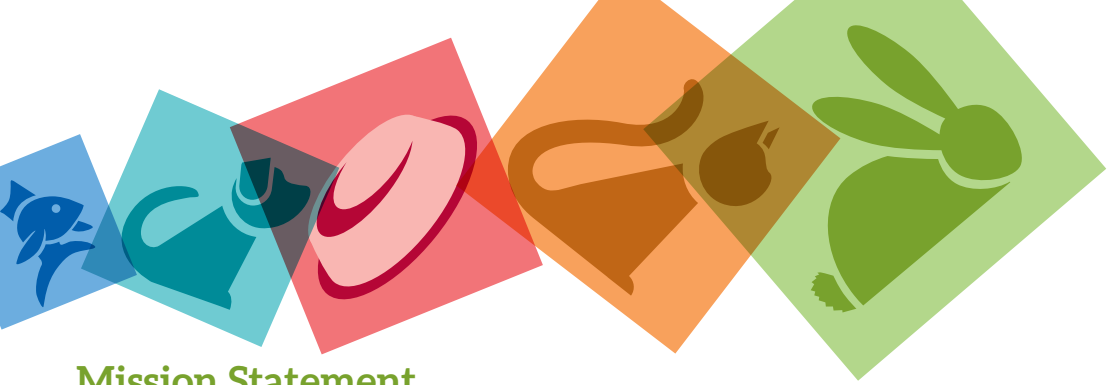
Having joined PFMA in 2009, Lana is responsible for dealing with all technical and regulatory issues, acting as an intermediary between government and the industry, and providing advice to members. Lana co-ordinates the technical working groups at PFMA, as well as the Review Committee.



SARAH HORMOZI *Veterinary & Nutrition*

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 King's College London, researching Animal Assisted Therapy. As well as running the PFMA Veterinary and Nutrition Committee, Sarah has editorial and event management roles. Sarah is the first point of contact for the public, press and members of the association.





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, 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 over 90% of the UK pet food market

Alba Protein	Gel Systems	Pointers Pet Foods
Alltech	Gladwell & Sons	Poortman
Alpha Feeds	Golden Acres	Premier Pet Nutrition
Arden Grange Pet Foods	Henry Bell & Co	Probiotics International
Beaphar UK /Sinclair	Hill's Pet Nutrition	Pro-Pet
Bern Pet Foods	Interpet	Provimi
Bob Martin	John Pointon & Sons	Purina
Burgess Pet Care	Johnston and Jeff	Rettenmaier (JRS)
Burns Pet Nutrition	Lily's Kitchen	Roger Skinner
Butcher's Pet Care	Marches Natural	RSPB Trading
C&D Foods	Marriages Specialist Foods	Sarval
Caledonian	Mars Horsecare	Saturn
Cambrian Pet Food	Mars Petcare	Scanbio (Scotland)
Countryside Products	MPM	Solus
Crown Pet Foods	Natures Menu	Supreme
Devenish Nutrition	New Era Aquaculture	Tetra
Dodson and Horrell	Nose2tail	Thompson and Capper
DSM	Oscars Pet Foods	Town and Country
Feedwell Animal Foods	P&G	Vine House Farm
Fish4Dogs	Pacific Proteins	Vitakraft
Fold Hill Foods	Pedigree Wholesale	Wafcol
Frank Wright	Pet Project	Wagg
G B Seeds	Pets Choice	Westland Horticulture