



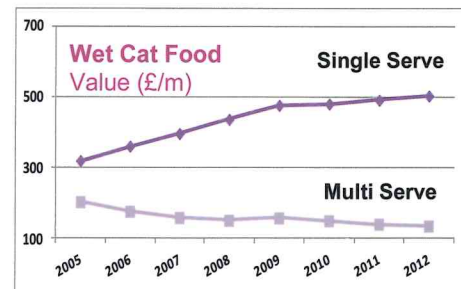
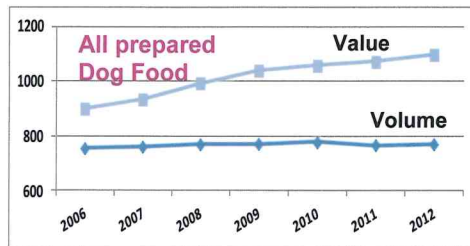
pfma
pet food manufacturers' association

**ANNUAL
REPORT
2013**

Pet Food Market Data



2012	Volume	Value	Volume	Value
	000 tones	£m	%Growth	%Growth
Dog	770	1,097	0%	2%
Cat	414	936	1%	2%
Small animal	81	67	-1%	0%
Other	5	72	n/a	n/a
Total Pet	1,280	2,172	1%	2%
Total Bird*	166	277	3%	2%



* Includes indoor bird, wild bird and pigeon food figures

Michael Bellingham, PFMA Chief Executive highlights key achievements in 2012:

1. Launch of the Pet Education Resources website, a signposting site for pet themed educational materials. This is the result of a successful collaboration between 18 organisations with an interest in pet welfare education.
2. Establishment of a PFMA Bird Group comprising new members in the wild bird market plus current members in cage and aviary. The Group has collected market data for the sector for the first time. It will be carrying out a PR campaign on bird feeding during 2013.
3. Setting up of a new PFMA Exports Group to inform and support the work of members in trying to access export markets.
4. Updating of Pet Size-O-Meters to include feeding tips for cats dogs and rabbits. Over 300,000 have been circulated to re-homing centres.
5. Continued involvement as trustee of National Pet Month. With the theme "You and Your Pet a winning team" over 600 events were held nationally raising money for local pet welfare charities.

2012

March

Launch of www.peteducationresources.co.uk a signposting site for all pet themed educational materials brought to you by the UK's leading animal charities and pet bodies



April



7 Apr-7 May: **National Pet Month** across the country



With over 600 events being held!

May



9 May: First Meeting of **PFMA Bird Group** in Peterborough with 11 new member companies



17 May: PFMA Vet Nut Committee met with academics at **Bristol Veterinary School** and representative of **Pet Obesity Task Force**

June



31 May-1 Jun: **FEDIAF AGM** in Vienna, with representatives from across Europe



July

7 Jun: PFMA secretariat visited **Hearing Dogs for Deaf People** in Princess Risborough



August

06 Sep: **Barking at the Moon Show – BBC Radio London**
PFMA joined Anna Webb and JoAnne Good for a round table discussion on pet food nutrition.



September



17 Sep: A lunchtime presentation for PFMA members and potential members at **PATS Harrogate**

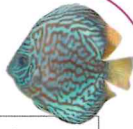
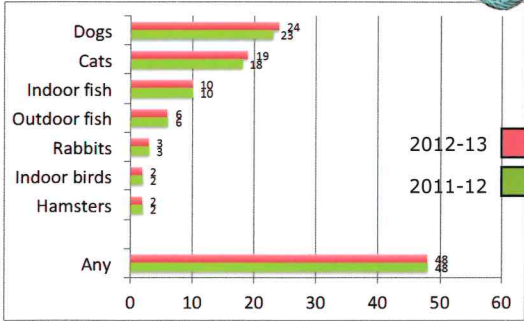


5-7 Oct: **BV Congress**
PFMA sponsored Marge Chanc talk on 'Moni the nutrition take of ill pa aimed at 2nd student and qualified vet nurses.



The UK Pet Population 2012

% of households owning pets



20 Nov: PFMA held its **annual MP Lunch** hosted by Sir Roger Gale MP



20 Nov: PFMA new **Exports Group** met for the first time, aiming to provide adequate export information to all members



SuperScrimpers:

December: PFMA works with *Superscrimpers* Channel 4 for their pet food feature



Compulsory Micro-chipping in England: Defra announced that from 6 April 2016 all dogs will be required to have a microchip

PFMA 'Friends for Life' Campaign

To be launched in May 2013, PFMA takes the lead in educating potential and current pet owners on good nutrition, responsible feeding and well being to improve longevity of pets. PFMA aim to engage the veterinary profession, pet retailers and groomers, UKs pet charities and welfare organisations as well as pet food manufacturers



October

November

December

January

February

March

2013

8 Oct: PFMA organised a visit for the **Food Standards Agency (FSA)** to the Waltham Pet Nutrition Research Centre and Mars Petcare wet pet food factory.



15-16 Nov: PFMA survey 160 veterinary professionals at the **London Vet Show**



5 Nov: PFMA met with **Liverpool Veterinary School** to discuss ways of working together



20 Nov: The **Animal Welfare Education Alliance (AWEA)** attended the NOAH House of Commons Pet Event, hosted by Neil Parish MP



PFMA **new logo** was created to include a bird icon



New design of **PFMA Pet Size-O-Meters** will include feeding tips for cats, dogs and rabbits

Cat Size-O-Meter

- Very Thin
- Thin
- Ideal
- Overweight
- Obese

Rabbit Size-O-Meter

- Very Thin
- Thin
- Ideal
- Overweight
- Obese

Dog Size-O-Meter

- Very Thin
- Thin
- Ideal
- Overweight
- Obese

PFMA Website introduces new pages on **indoor and outdoor birds**



7-10 Mar: PFMA supports the **National Pet Month Stand at Crufts (NEC, Birmingham)**



21 Mar: **PFMA AGM, Workshop & luncheon** at the Stationers Hall



Theme: *A Change in Behaviour for You and Your Pet'*

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 Manager

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 Affairs Manager

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 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 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, 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 2013. The format has changed this year to make it more compact, graphic in appearance and hopefully easier to read. You will still find the latest information on pets and the pet food market which I trust you will find useful.



As with the rest of the economy, 2013 remained a challenging one for the pet food industry. Having said that, our latest industry data indicates sales are holding up with a 2% increase in value and 1% increase in volume in 2012. The pet food industry now stands at £2.2bn, compared to last year, and is an even more impressive £2.5bn when we include the bird market. This we can now do since being joined by 11 new members operating in the wild bird sector. They have come together with a number of current members to form the Bird Group which covers cage and aviary as well as wild birds. This group began by collecting market data for the first time for their sector and will carry out a public relations campaign in the coming months. We welcome our latest members. Our increasingly broad representation gives us the ability to talk to our stakeholders with real authority, and for us this is a strength and something we are immensely proud of.

John Walgate - Pets Choice

PFMA Members - Manufacturers & Suppliers

Representing over 90% of the UK pet food market

AAK	G B Seeds	Pointers Pet Foods
Alba Protein	Gardman	Poortman
Alltech (UK)	Gel Systems	Premier Pet Nutrition
Alpha Feeds	Gladwell & Sons	Probiotics International
Anglian Meat Products	Golden Acres	Propet
Beaphar UK Ltd /Sinclair	IAMS (P&G)	Prosper De Mulder (PDM)
Bern Pet Foods	Interpet Limited	Provimi (SCA Nutec)
Bob Martin (UK)	John Pointon & Sons	Rettenmaier (JRS)
Burgess Pet Care	Johnston and Jeff	Roger Skinner
Burns Pet Nutrition	Leander (Arden Grange)	Rolf C Hagen
Butcher's Pet Care	Lily's Kitchen	RSPB Trading
C&D Foods	Marches Natural	Saturn
Caledonian	Mars Horsecare	Scanbio (Scotland)
Cambrian Pet Food	Mars Petcare	Supreme
Countryside Products	MCM Select Foods	Thompson and Copper
Crown Pet Foods (James Wellbeloved & Royal Canin)	MPM	Town and Country
Devenish Nutrition	Mr Johnsons (Henry Bell)	Vine House Farm
Dodson and Horrell	PURINA	Vitacraft
DSM	New Era Aquaculture	Wafcol (Armitages)
Feedwell Animal Foods	Oscars Pet Foods	Wagg
Fish4Dogs	Pacific Proteins	Westland Horticulture
Fold Hill Foods	Pedigree Wholesale	
Frank Wright	Pets Choice	