




PLACING PETS AT THE CENTRE OF EVERYTHING WE DO

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CHAIRMAN'S WELCOME



I am delighted to introduce the PFMA Annual Report 2019 and share our key milestones from my action packed first year as Chairman.

Brexit has been a tumultuous and frustrating journey for us all. With a dedicated Task Force, PFMA has continued to lead the industry ensuring members are well equipped to deal with the possible outcomes. Engagement with government and the wider food and feed sector, building relations with UK ports and developing a well-resourced online toolkit for members, have all been areas of focus.

Last year, we launched the PFMA Pet Food Vision, each year focusing on a key pillar underpinning our industry – animal welfare (2018), nutrition (2019) and safety and standards (2020). We set the vision in motion focusing on animal welfare and developed the PFMA Animal Welfare Framework – our policy on welfare. We continue to co-sponsor the All-Party Parliamentary Group on Animal Welfare (APGAW) to ensure animal welfare continues to be a key consideration.

Great quality nutrition is a key component of animal welfare and it is our pillar of focus in 2019. Our members are responsible for feeding around 50m pets and we take that responsibility very seriously. As an industry, we are committed to providing high quality, nutritious and safe pet food and providing clear guidelines on how to responsibly feed pets. This will be brought to life throughout the year.

All this work would not be possible without our highly engaged members, the dedication of the PFMA Secretariat team and the support of the organisations we work closely with. I look forward to more milestones reached in 2019.

Tony Parkinson, PFMA Chairman

THE PET FOOD VISION CONTINUES



Michael Bellingham, PFMA Chief Executive, highlights the key milestones of activity in 2018

PFMA is committed to maintaining a credible and responsible industry by placing pets at the centre of everything we do. The key areas of focus, which help us achieve this, are encapsulated in the three pillars of our Pet Food Vision – Animal Welfare, Nutrition, and Safety & Standards.

In March 2018, we launched the Pet Food Vision, with the spotlight firmly on animal welfare – our first pillar. We are proud champions of some of the highest feed safety and animal welfare standards in the world. We are working hard to ensure these are maintained.

Making sure we have the right regulatory environment to produce safe and nutritious pet foods is vital to our members and Brexit has led to a significant increase in our work in this area. We have been lobbying to ensure the voice of the pet food industry is listened to. We have also been looking at the practical implications, ensuring members are well prepared for all eventualities. The milestones listed in our Annual Report highlight where we have focused our energies in 2018.

NUTRITION PILLAR – WHAT TO EXPECT IN 2019

During this second year of our three-year pet food vision, our focus is nutrition. This is timely, as it is the 10-year anniversary of our first obesity campaign. The focus will be on;

- Promoting healthy feeding and weight management
- Educating our members as we launch the PFMA nutrition course
- Building on the science behind small animal nutrition as we prepare for our second Companion Animal Nutrition Conference (2020).

Three core pieces of activity for 2019 are as follows:

HEALTHY WEIGHT HUB

PFMA has a wealth of nutrition-themed resources for members, professionals and pet owners. In order to make it easier to locate all the tools specifically related to weight management, we are launching a 'Healthy Weight Hub'. This dedicated section of our website contains all the Pet Size O-Meters, obesity posters, weight management logs and food diaries. Here you will also be able to access the relevant health related media articles and calorie calculators.

We will be actively promoting this hub to all pet care professionals encouraging them to use the tools with pet owners.

NEW NUTRITION DATA

To look in more detail at current pet nutrition trends and weight management, we will be expanding our consumer research and releasing the results later on in the year.

WHITE PAPER ON NUTRITION

2019 also marks the ten-year anniversary of PFMA's first Obesity White Paper and we will work closely with the relevant experts to release an update on this paper. This will detail all new nutrition data in addition to comparing to the data collected at London Vet Show.

WHAT TO LOOK FORWARD TO IN 2020

SAFETY, STANDARDS & SUSTAINABILITY

Looking to 2020, PFMA puts safety, standards and sustainability at the heart of its work. The attention will be on safe sourcing, safe pet food products and a safe environment. We will focus on traceability, sustainability and industry best practice.



PET AND INDUSTRY DATA

Every year, PFMA gathers Pet Food Market Data and commissions Pet Population Research – talking to 8000 members of the public. Here we have a snapshot of our findings but more detail can be viewed in the Statistics section of our website (www.pfma.org.uk/statistics).

TOP TEN PETS

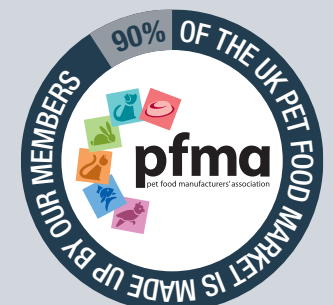
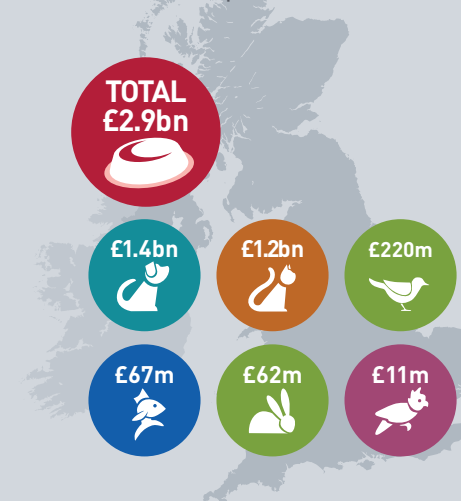


There are 2.7 million indoor fish tanks (6% households) and 1.3 million outdoor ponds

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

PET FOOD MARKET DATA

PFMA is the principal trade body representing the UK pet food industry. Our 85 member companies account for over 90% of the UK market.



PFMA'S JOURNEY – 2018 MILESTONES



PFMA establishes Brexit Trade Group

PFMA hosts APGAW round table on 'Sentience' – a hot animal welfare topic stemming from Brexit discussions

PFMA presents to veterinary students at Glasgow Vet School

PFMA launches three-year Pet Food Vision at Annual Convention

29th National Pet Month



FEDIAF AGM, Rotterdam – theme 'International Trade' and FEDIAF launches Nutritional Guidelines

Rabbit Nutrition & Welfare Symposium

PFMA members seminar on labelling and nutritional guidelines

Annual media coverage review confirms 298 PFMA pieces, reaching 50 million people

Visit to Belfast and Dublin to meet members and officials to discuss impact of Brexit on the Irish economy in October

15 Nutrition Factsheets available online

PFMA presents on UK Pet Food Industry for Anglia Ruskin University students in Cambridge

JAN

MAR

MAY

JUNE

SEPT

DEC



FEB

PFMA joins the NFU Food Supply Chain Summit and adds its voice to a sector statement on four key policy areas covering trade, labour, regulation and agricultural policy. Letter secures widespread national coverage

APR

PFMA meeting with the World Animal Health Organisation, Paris



JULY

Collaboration with Animal Medicines Training Regulatory Authority (AMTRA) and The Animal Health Distributors Association (AHDA) on training SQPs on pet health and nutrition

PFMA launches Brexit Toolkit section of extranet

NOV

PFMA launches Animal Welfare Framework. Read more at pfma.org.uk/pfmas-pet-food-vision



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).



MEMBERSHIP BENEFITS 2018

PFMA is dedicated to representing its members and promotes the responsible manufacture of quality, nutritious products.

INFORMATION RESOURCE



EDUCATION



LOBBYING



NETWORKING & CREDIBILITY



INFORMATION RESOURCE	16 Brexit Newsletters	Dedicated Brexit Toolkit on extranet (with docs, checklists, latest news and updates)	10 dedicated Working Groups & Committees
Dedicated team on hand to deal with technical queries	35 working group meetings	44 editions of pet themed 'Your News' for members	Dedicated customs and trade group
Annual pet data report	Annual pet food market report (exclusive to data scheme participants)	EDUCATION	Dedicated online portal for members
3 new pet food fact sheets and 1 poster	Pet Food Calorie Calculators were updated with the latest European standards to determine energy density.		Raw pet food calorie calculator for cats and dogs were also added.
Member Seminar on latest sector guidelines	Training sessions and workshops (Glasgow University Pet Food Seminar, Rabbit Nutrition Seminar in London)		17 pet food articles produced for trade and hobby press
Collaboration with AMTRA and AHDA on training SQPs on pet health and nutrition (several dates throughout the country)		LOBBYING	Dedicated Brexit Task Force
Co-sponsor of All Parliamentary Group for Animal Welfare (APGAW)	Over 20 meetings with government bodies	Over 60 separate Brexit meetings	Member of the Canine Feline Sector Group (CFSG)
Member of FEDIAF (The European Pet Food Federation)	NETWORKING & CREDIBILITY	Annual Convention and AGM	298 PFMA Branded Media Mentions

THE PFMA TEAM

MICHAEL BELLINGHAM – CHIEF EXECUTIVE

Following a career in Brussels, which focused on international trade issues, Michael moved to PFMA in 2004. 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, ensuring the best possible outcome for the pet food sector.

NICOLE PALEY – DEPUTY CHIEF EXECUTIVE – COMMUNICATIONS & ANIMAL WELFARE

Nicole works alongside Michael shaping the strategic direction of PFMA and runs the Communications Committee and PFMA Press Office. Nicole co-chairs the Communications Working Group of the European Pet Food Federation (FEDIAF).

SARAH HORMOZI – SCIENCE AND EDUCATION MANAGER

Sarah produces educational resources and organises seminars in collaboration with members, universities, veterinary bodies and other pet professionals. Sarah runs the PFMA Veterinary and Nutrition Committee and the Bird and Small Animals Working Groups.

LANA MORGAN – REGULATORY AFFAIRS MANAGER

Lana is responsible for all regulatory issues, acting as an intermediary between government and industry, representing PFMA to many government bodies. Lana provides regulatory support to members on a wide range of topics from ingredients through to export.

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 the Food & Drink Federation and has substantial experience in European legislation.

FRITHA FLINT – COMMUNICATIONS CONSULTANT

Fritha focuses on all aspects of communications including event support and website development.



Members:

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|--------------------------------------|-----------------------------------|-----------------------------------|
| Alba Protein (Omega, Leo Group) | Gel Systems | Pacific Proteins |
| Alltech | Gladwell & Sons (Copdockmill) | Paleo Ridge Raw |
| Arden Grange (Leander) | Grove Pet Foods | Pedigree Wholesale (Pet Products) |
| Beaphar | H J Lea Oakes | Pelagia |
| Benyfit Natural Pet Food | Happy Pet Products (Healthy Paws) | Pet Food UK |
| Billy and Margot (Real Dog Food Co) | Henry Bell and Co | Pet Munchies |
| Bob Martin | Hill's Pet Nutrition | Poppy's Picnic |
| Burgess Pet Care | Honey's Real Dog Food | Premier Pet Nutrition |
| Burns | Inspired Pet Nutrition | Pro-pet |
| Butcher's Pet Care | Interpet | Rolf C Hagen |
| C&D Foods | JG Pears | Regency Feeds |
| Cargill Premix & Nutrition (Provimi) | John Pointon and Sons | Rettenmaier (JRS) |
| Celtic Connection Holistic Pet Food | Johnsons Veterinary Products | Roger Skinner |
| Cotswold Raw | Johnston & Jeff | Sarval |
| Crown Pet Foods | Lallemand | Spectrum Brands (IAMS and Tetra) |
| Devenish | Lily's Kitchen | Suffolk Group |
| Dietex International | Mackle | Supreme Pet Foods |
| Dodson and Horrell | Marches Natural (Fieldfayre) | Tails |
| DSM | Mark & Chappell | The Dog Treat Company |
| Dupont | Marriage's Specialist Foods | The Innocent Pet Care Company |
| Durham Animal Feeds | Mars Petcare | Thompson and Capper |
| Eden Holistic Pet Foods | Millies Wolfheart | Topspec |
| Feedwell Animal Foods | MPM Products | Town & Country Petfoods |
| Fish4Dogs | Natural Instinct | TPMS Animal Feeds |
| Fold Hill Foods (inc Pointer) | Natural Vetcare (Greencoat) | Virbac |
| Frank Wright (Trouw Nutrition GB) | Natures Menu | Wafcol (Armitages) |
| Frozzy's | Nestlé Purina Petcare UK | Westland |
| GA Petfood Partners | Nutriment | Wolf Tucker |
| | Oscar Pet Foods | World Feeds |