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

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’. The 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

<table>
<thead>
<tr>
<th>Pet Type</th>
<th>Quantity</th>
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</thead>
<tbody>
<tr>
<td>9 million dogs</td>
<td>9,000,000</td>
</tr>
<tr>
<td>7.5 million cats</td>
<td>7,500,000</td>
</tr>
<tr>
<td>600,000 rabbits</td>
<td>600,000</td>
</tr>
<tr>
<td>500,000 indoor birds</td>
<td>500,000</td>
</tr>
<tr>
<td>500,000 domestic fowl</td>
<td>500,000</td>
</tr>
<tr>
<td>400,000 guinea pigs</td>
<td>400,000</td>
</tr>
<tr>
<td>300,000 hamsters</td>
<td>300,000</td>
</tr>
<tr>
<td>300,000 tortoises and turtles</td>
<td>300,000</td>
</tr>
<tr>
<td>300,000 lizards</td>
<td>300,000</td>
</tr>
<tr>
<td>200,000 snakes</td>
<td>200,000</td>
</tr>
</tbody>
</table>

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

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

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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

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

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

LOBBING

3 new pet food fact sheets and 1 poster
Pet Food Calorie Calculators were updated with the latest European standards to determine energy density.
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
Dedicated Brexit Task Force

NETWORKING & CREDIBILITY

Collaboration with AMTRA and AHDA on training SQPs on pet health and nutrition (several dates throughout the country)
Co-sponsor of All Parliamentary Group for Animal Welfare (APAGW)
Member of FEDIAF (The European Pet Food Federation)
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
Frisa focuses on all aspects of communications including event support and website development.