



ANNUAL REPORT 2024





Contents

An Introduction from the FEDIAF President	02
A Message from the FEDIAF Secretary General	04
Highlights from the FEDIAF Deputy Secretary General	05
<hr/>	
An Overview of Industry Numbers	06
A Snapshot of FEDIAF Activity	07
A Snapshot of Digital and Media Activity	08
<hr/>	
The Pet Food Industry in 2023/2024 – Key Working Group Milestones	10
<hr/>	
Highlights from FEDIAF Working Groups:	
A. Additives and Undesirable Substances Working Group	12
B. Nutrition Working Group	13
C. Analytical Science Working Group	14
D. Product Communication Working Group	15
E. Environmental Sustainability Working Group	16
F. Feed Materials and Trade Working Group	18
G. Small Pets Working Group	19
H. Communications Working Group	20
<hr/>	
Governance and Structure	22
Committees, Working Groups and Task Force Members	23
The FEDIAF Secretariat Team	27
FEDIAF Membership	29
<hr/>	
Facts and Figures: A Robust Approach	32
Facts & Figures European Overview 2022	33
Facts & Figures by Country	34
Appendix	43
Glossary	44



An Introduction from the FEDIAF President



I'm delighted to introduce FEDIAF's Annual Report for 2023/2024. With the recent European Elections, it is a fitting time to reflect on yet another productive year for the Pet Food industry.

Our newly released Facts & Figures featured on pages 32-43 underscore our Industry's significant role. We are responsible for producing around 10 million tonnes of pet food worth around 29.2 billion, which feeds over 350 million pets. We recognize the immense responsibility, which we take seriously.

PROACTIVE ADVOCACY IS KEY

Over the past year, we have been dedicated to actively engaging with EU institutions and other stakeholders in Brussels to champion and safeguard the interests of the pet food industry. FEDIAF has played a pivotal role in shaping a regulatory framework that enables our industry to thrive. Our contributions have been instrumental in safeguarding the use of Xanthan in the pet food industry, emphasising the importance of Category 3 animal fats, securing recognition of Organic Pet Food, ensuring Green Claims Packaging legislations consider pet food specific needs, and more.

We are proud of our achievements and remain committed to advancing the interests of the pet food industry through proactive engagement and strategic advocacy.



FEDIAF MANIFESTO

In a significant step towards proactive advocacy, we have successfully developed FEDIAF's Manifesto. This powerful tool has been designed to effectively communicate our key messages to stakeholders in a clear and concise manner. It empowers national associations to engage at the national level, amplifying our collective voice. Additionally, the Manifesto has proven to be invaluable during pre-election periods in Brussels, facilitating meaningful engagement with policy makers.

This comprehensive manifesto confirms three primary focus areas, each aligned with our core pillars: guaranteeing the provision of safe and nutritious pet food, championing the pivotal role of pets in society, and fostering sustainability across the entire pet food supply chain.



GUARANTEEING THE PROVISION
OF SAFE AND NUTRITIOUS PET FOOD



CHAMPIONING THE
PIVOTAL ROLE OF PETS
IN SOCIETY



FOSTERING
SUSTAINABILITY FROM
FARM TO FORK

ENSURING THE SUPPLY OF SAFE AND NUTRITIOUS PET FOOD

Over the past year, FEDIAF's advocacy efforts have remained steadfast in advocating for a supportive regulatory framework for the pet food industry. We have consistently highlighted the importance of maintaining access to key ingredients, including Category 3 animal fats. Our work contributed to keeping Category 3 animal fats out of Annex 9.

Alongside this work at a European level, we have supported our National Association members. We ran a workshop and provided members with a toolkit and materials to support their local endeavours. The provision of FEDIAF resources, factsheets, and guidance has undoubtedly empowered our members to proactively engage with national authorities, ensuring they stay ahead in their communications efforts. We have seen specific success stories such as work in the UK.

Furthermore, the protection and reauthorization of feed additives have continued to be a key focus for the pet food industry. As we continue to navigate these regulatory challenges, we remain vigilant in advocating for policies that prioritise safety and the long-term sustainability of our industry.

PROMOTING THE ROLE OF PETS IN SOCIETY

Within the scope of our second pillar, FEDIAF has two primary strands of activity. Firstly, we have continued to raise awareness of the significant benefits of pet interaction and importance of responsible ownership. Our work in this area has focused on communicating the latest science and working collaboratively with our fellow Pet Alliance Europe partners.

As a veterinarian myself, I was delighted that founding partners AnimalhealthEurope and FEDIAF welcomed FVE (Federation of Veterinarians of Europe) and FECAVA (Federation of European Companion Animal Veterinary Associations) to the Alliance last year. Together, we are united in our mission to champion pet welfare and underscore the positive impact of pets on the lives of all Europeans, a concept we term #PetPower.

Moreover, we have emphasised the fundamental role of nutrition in pet welfare through our contributions to the ‘feeding and watering’ components of proposed companion animal welfare legislation. We have highlighted that FEDIAF’s Nutritional Guidelines outline all the specific nutritional requirements of pets based on their life stage, health status, and activity levels.

FEDIAF takes great pride in its role in producing these comprehensive Feeding Guidelines, which are written and peer-reviewed by a Scientific Advisory Board (SAB) comprising independent board-certified veterinary nutritionists—veterinarians possessing expertise in nutrition.

DRIVING SUSTAINABILITY FROM FARM TO BOWL

During this period, we have been actively involved in discussions surrounding the Green Claims Directive and the Packaging and Packaging Waste Regulation (PPWR) proposal.

Since our partnership with the European Commission in the development of Performance Environmental Footprint Category Rules for PEF (PEFCRs) in 2018, we’ve remained dedicated to refining this methodology, which assesses the environmental impact of pet food products across their life cycle. This takes into account the pet food industry’s unique characteristics, such as the use of animal by-products.

We will continue to advocate for PEFCRs, as they enable informed decision-making to improve environmental performance and facilitate consumer product comparisons, promoting sustainable purchasing habits. As for the Packaging and Packaging Waste Regulation (PPWR), while we endorse a Reduce, Reuse, Recycle strategy, it’s essential to ensure that reuse targets align with

regulations mandating new packaging for prepared pet food, striking a balance between environmental goals and regulatory compliance.



A COLLECTIVE VOICE – THANK YOU

At FEDIAF, we are proud to be the collective voice of our members, comprising 15 national associations and 5 direct companies. With your support, we are able to advocate for the interests of approximately 375 pet food companies across Europe, representing 95% of the industry. Through this collective effort, we strive to make a positive impact on the lives of the 350 million pets in Europe.

I would like to take this opportunity to acknowledge and express our continued appreciation for our Secretary General, Sonia Franck, who joined FEDIAF in January. Her contributions and leadership have been invaluable, and we are delighted to have her on board.

I would also like to extend our gratitude to our Deputy Secretary General, Alice Tempel Costa, for her exceptional contribution throughout 2023. Her dedication and expertise have played a significant role in our success.

Working alongside the Secretariat team, including Aleksandra Prandota and James Ramsay, has been a pleasure.

Our Annual Report offers a comprehensive overview of the initiatives organized within FEDIAF’s Working Groups, committees, and task forces. We highly value your expertise and involvement in these groups, and we encourage anyone interested in joining to reach out to our team.

Thank you all for your continued support, dedication and contributions and we look forward to another productive year.

**ROSA CARBONELL
PRESIDENT, FEDIAF**

A Message from the FEDIAF Secretary General



In my esteemed role as the Secretary General of FEDIAF EuropeanPetFood, since assuming office in January, I have been privileged to embark on a remarkable and transformative journey within the dynamic Pet Food Industry. I extend my deepest appreciation to our President, Rosa, and our committed members for their warm embrace. I am also truly grateful to my colleagues and the spirit of collaboration within our Secretariat.

A significant milestone in our transformative journey was the unveiling of our Manifesto in April. This was a moment of shared pride and purpose, uniting Rosa, myself, and the distinguished members from the Communications Working Group. The choice of Brussels as the venue was not just symbolic; it was a testament to our commitment to championing our industry.

Delving into the essence of our extensive member network has been an enlightening voyage. Through virtual dialogues on Teams and immersive visits to our members' diverse offices and production facilities, each encounter has provided deep insights into the resolute commitment and unified ethos that define the essence of the Pet Food Industry.

In addition to my role at FEDIAF, I'm honoured to serve as the Chair of Pet Alliance. This platform is crucial for advocating pet welfare, highlighting the bond between companion animals and

humans, and their role in society. It's also an opportunity for us to partner with key organizations like AnimalHealth Europe and veterinary associations FVE and FECAVA.

The upcoming elections at the EU level present a valuable opportunity for us to strengthen our connections and advocate for the needs of our industry at a broader legislative level.

Harmonious collaboration forms the cornerstone of our mission to amplify the harmonized voice of our industry across Europe. I am filled with a profound sense of anticipation and commitment to advancing the collective interests of our members and elevating the Pet Food Industry.

As a formidable, united front, we pledge to continue our pursuit to enhance the lives and well-being of Europe's cherished 352 million pets, envisaging a future of vitality, health, and shared prosperity.

SONIA FRANCK
SECRETARY GENERAL, FEDIAF

Highlights from the FEDIAF Deputy Secretary General



This year has been exceptionally busy for the FEDIAF Secretariat and I would like to thank our members for their invaluable expertise and support throughout 2023 and recent months.

Reflecting on the past year, there have been numerous highlights, and within the following pages, you'll find a comprehensive overview of our activities. Pages 6-9 provide a snapshot of our industry and FEDIAF events, insights into the production of new materials, our digital initiatives and feature articles. Following that, pages 10-11 offer a glimpse into the notable achievements of each working group.

As many of our members are aware, FEDIAF operates with seven technical working groups, each with its unique focus: additives, analytical science, nutrition, product communication, environmental sustainability, feed materials and trade and small pets. With approximately 200 members actively contributing across these groups, along with subgroups and task forces addressing specific mandates like animal welfare under Communications WG, we are immensely grateful for the technical expertise and dedication demonstrated by our chairs and members.

We extend an open invitation to any interested members to join these efforts by reaching out to us via fediaf@fediaf.org. Engaging in this rewarding work collectively propels our industry forward, aligning with the goals outlined in our pillars and Manifesto.

Together, through collaboration and dedication, we continue to advance the Pet Food Industry towards a brighter, more sustainable future.

ALICE TEMPEL COSTA
DEPUTY SECRETARY GENERAL, FEDIAF

FEDIAF – European PetFood

A Snapshot of Industry Numbers



1970

Founded in 1970 we've been established for
over 50 years



18

We're represented in
18 countries



15

National Association
Members



05

Member companies



375+

Promoting the views of over
375 pet food companies
throughout Europe



95%

We represent 95% of the
industry



200+

We have over 200 Members
involved in Working Groups



350+

Feeding over 350m pets!

FEDIAF – EuropeanPetFood

A Snapshot of FEDIAF Activities



FEDIAF EuropeanPetFood Manifesto

FEDIAF POSITION PAPER
Packaging & Packaging Waste Regulation

FEDIAF POSITION PAPER
Companion Animal Welfare

The FEDIAF manifesto sets out the principles that underpin the European Pet Food industry's approach to the future. It highlights the importance of continued innovation, responsible production and consumption, and the role of the industry in supporting animal welfare and environmental sustainability.

Raising Nutritional Standards

Nutritional Guidelines

PET FA
Evil Hayvan Mamaşları Derneği
LANSMAN TOPLANTISI

200+ Attendees at Annual Congress and AGM**

1 Manifesto Launched

7 Technical Working Groups and Communications

9 Task Forces and Subgroups*

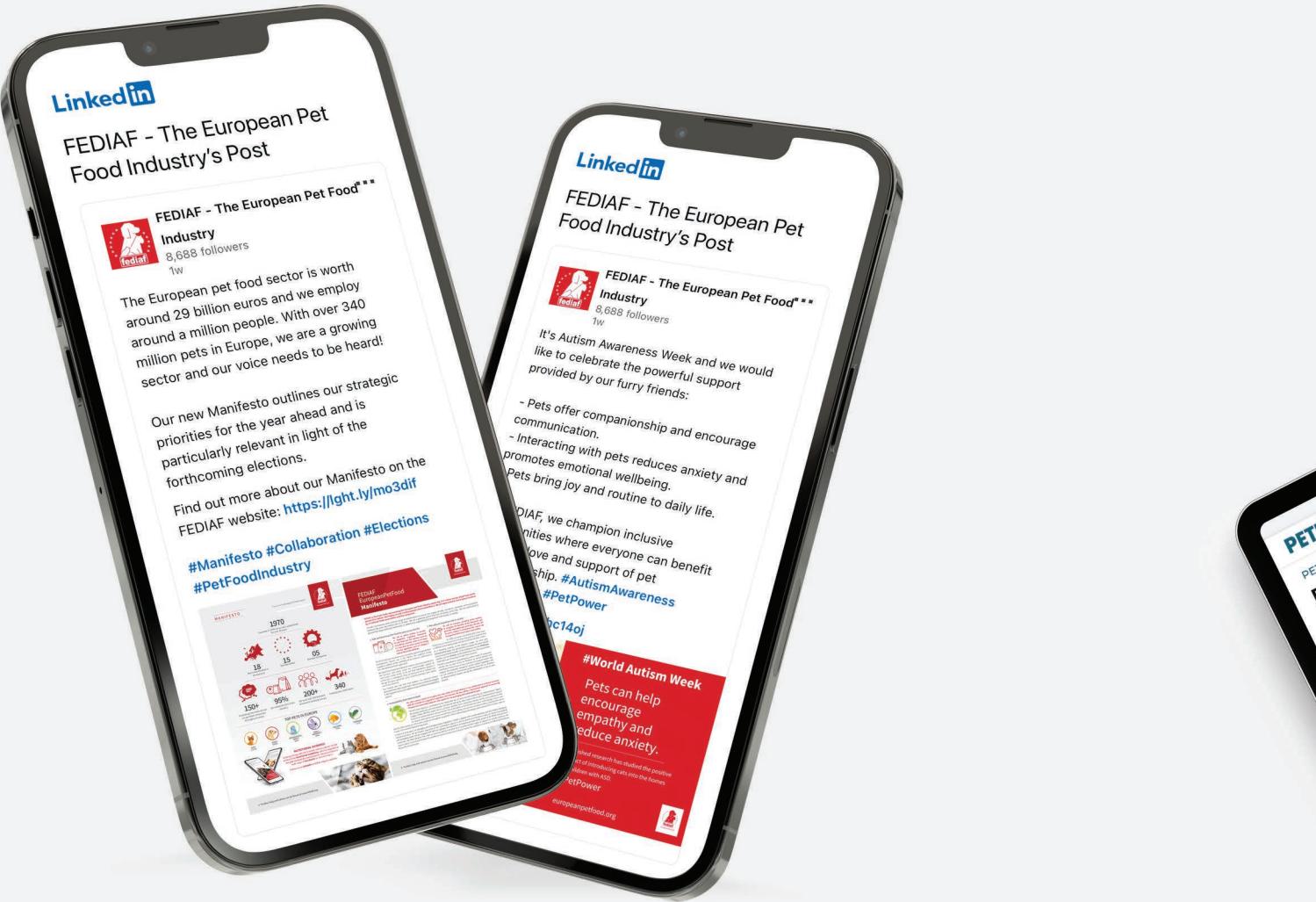
100+ Guests attended #PetPower event

25+ Articles and positions published

* Including Animal Welfare, PARNUTS, Category 3, Organics, Nano, Nutrition SAB, Factsheet Subgroup and two PEFCR groups. ** Combined with GAPFA Congress.

FEDIAF – European PetFood

A Snapshot of Digital & Media Activity



8500+

LinkedIn followers

2000

New followers in one year (+30%)

COVERAGE IN KEY PUBLICATIONS SUCH AS:

- Pets International
- Feed Navigator
- European Supermarket Magazine
- Feed Additives
- Pet Food Processing
- All Pet Food
- EspeciesPRO
- Pet Food Industry



A close-up photograph of a silver tablet displaying a news article from 'FOODINDUSTRY'. The main headline reads 'European pet food sales reached EUR29.1 billion in 2022'. Below the headline is a sub-headline: 'In 2022, the European pet food market grew to EUR29.1 billion (US\$31.1 billion) with an average 5.1% annual growth rate during the past three years.' A large, fluffy grey cat is shown lying on its side next to a small bronze-colored Eiffel Tower figurine. The background of the tablet screen shows other parts of the website, including a sidebar with a woman's photo and text in Spanish.

The image displays two devices, a smartphone and a tablet, both showing the website for PET food PROCESSING. The smartphone on the left has a green sidebar on its left edge containing several news snippets. The main content area of the phone discusses FEDIAF's influence on the European pet food industry, mentioning a 10% increase in sales and a 10% rise in imports. The tablet on the right shows the homepage with a large, bold headline 'FEDIAF: European pet ownership fuel billion pet food industry'. Below the headline is a photograph of a cat looking out from a window. A sidebar on the right of the tablet includes links for Business, Operations, More, Product Development, Trends, Advertising, and Subscribe. The bottom right corner of the tablet screen shows a snippet of an article by Jordan Tyler, dated 09.22.2023, with the text 'Cats rule the roost at 104.3 million. These European populations while 25% owned households own'.

The Pet Food Industry 2023/24 Key Working Group Milestones

FEDIAF is one voice working on behalf of the Pet Food Industry across Europe and has many achievements, which are possible due to the collaboration of its members. Here we highlight a few of these 'milestones' by Working Group:





ADDITIVES & UNDESIRABLE SUBSTANCES WORKING GROUP

FEDIAF successfully secured a positive EFSA opinion for Propyl gallate, completed tolerance studies for BHT & Xanthan gum in cats and agreed the outline for 4 further critical tolerance studies. In addition following several meetings with DG SANTE, we managed to have flexibility for the industry with regards authorization of Xanthan gum (cats) and Locust bean gum (cats and dogs), protecting the industry from critical ingredient loss and costs in excess of €200M.



ENVIRONMENTAL SUSTAINABILITY WORKING GROUP

The group focused on the packaging and packaging waste regulation (PPWR) proposal, the Green Claims Directive proposal, and oversaw the PEFCR update. The group also has oversight on the FEDIAF's Task Force on Category 3 animal fats.



FEED MATERIALS AND TRADE WORKING GROUP

The group monitored the developments and highlighted opportunities for improving cross border trade (with a special focus on post Brexit trade and mitigation of new barriers). FEDIAF presented the positions of the WG to the European Commission, DG TRADE and stakeholders such as FoodDrinkEurope.



SMALL PETS WORKING GROUP

The Small Pets Working Group continued work on nutritional guidelines for rabbits and ornamental fish. These guides will be expanded in 2024 to include guinea pigs and, later, pet birds.



COMMUNICATIONS WORKING GROUP

The Communications Working Group led the development of a Manifesto in advance of European Elections. This important document outlines the Industry's 'asks' of policy makers and stakeholders. We also welcomed two new partners to the Pet Alliance so we now work closely with AnimalhealthEurope, FVE and FECAVA to promote #PetPower.

NUTRITION WORKING GROUP

FEDIAF and FEDIAF's Scientific Advisory Board held two highly successful in person meetings in 2023, following a pause due to the pandemic. These meetings provided the industry and FEDIAF's independent Nutrition experts a unique opportunity to meet and exchange on the most up to date science in the field of Cat and Dog nutrition. Prof. Giacomo Biagi from the Department of Veterinary Medical Science, University of Bologna was elected as the vice Chair of the Scientific Advisory Board.



ANALYTICAL SCIENCE WORKING GROUP

The group has been actively driving industry recommendations on the development of analytical methods and is working on developing a gold standard method to measure acrylamide in pet food.



PRODUCT COMMUNICATION

The publication of Regulation 2023/2419 'On the labelling of organic pet food', published in October 2023, takes into consideration the idiosyncrasy of pet food and provides specific labelling rules, very similar to the human food rules.

A. Additives and Undesirable Substances Working Group

INTRODUCTION

FEDIAF's Additives and Undesirable Substances Working Group includes European industry experts on legislation governing feed additives and undesirable substances. The team also has expertise in key functional areas such as chemistry, toxicology, safety testing and business understanding. The challenges the group face are dynamic and of high impact for our industry, requiring a strong commitment and excellent team work from members and secretariat throughout the year.

Additives are an essential component in offering safe, stable and nutritionally balanced diets to pets across Europe. They are also key to ensuring products achieve the high levels of pet and owner acceptance in terms of flavour, texture and appearance that enables the European pet food business to thrive.

Only additives that have adhered to the strict authorization/reauthorization/renewal processes of the EU are permitted for use. The working group continuously engages with the European Commission, the European Food Safety Authority (EFSA) and industry partners including other trade associations to ensure that key ingredients are thoroughly assessed with the best possible body of evidence.

Similarly, Undesirable Substances are a constant threat in a world where ingredients are increasingly sourced globally. FEDIAF, in association with the EU Commission and EFSA, are constantly vigilant to emerging legislative change. We work to understand the impact and respond on behalf of the EU pet food industry.

OBJECTIVES

- Ensure the safety and utmost quality of every ingredient used in pet food.
- Enable excellence in safe and balanced nutrition through maintaining access to key nutritional, sensory and technological feed additives.
- Encourage freedom for our members to innovate through access to additives designed to maximise pet and owner experience through all five senses.

ACHIEVEMENTS

Additives: Successful collaboration across the industry has been fundamental in the achievements of this working group.

- FEDIAF successfully secured a positive EFSA opinion for Propyl gallate.
- FEDIAF also met DG SANTE to explain our progress and challenges on the Xanthan gum and request flexibility for the industry with regards authorization of Xanthan gum (cats) and Locust bean gum (cats and dogs), protecting the industry from critical ingredient loss and costs in excess of €200M.
- Strong applicant outreach results in FEDIAF taking control of Locust bean gum dossier and collaborating to secure future of acacia gum.

Collaboration is key in the working group, with a broad range of members offering the expertise of their respective companies and access to their research facilities to create test diets, evaluate product acceptance and obtain analytical results to support the goals of FEDIAF. It is the development of this interdisciplinary, cross-functional and international collaboration that has delivered the results of which we are proud.



B. Nutrition Working Group

INTRODUCTION

One of FEDIAF's main objectives is to safeguard the wellbeing of pets by ensuring its member companies provide well-balanced and nutritionally sound pet food. To achieve this goal, FEDIAF's experts work together with a Scientific Advisory Board (SAB) that includes independent and renowned board-certified veterinary nutritionists from across Europe. The SAB advises on the scientific standards of the recommended nutrient levels, which are incorporated in FEDIAF's Nutritional Guidelines.

FEDIAF is regularly updating the recommendations for nutrient levels in pet food based on the latest peer-reviewed science, in close cooperation with the SAB. This enables the pet food industry to adjust the nutritional quality of complete diets for dogs and cats according to state-of-the-art scientific knowledge.

OBJECTIVES

- Contribute to the wellbeing of pets by ensuring the manufacture of nutritious and palatable food reflecting the most recent developments in scientific knowledge.
- Ensure FEDIAF Guidelines are the 'go to' document on pet nutrition in Europe – and beyond.
- Ensure a level playing field and enhance scientific cooperation between pet food manufacturers, petcare professionals and competent authorities.

ACHIEVEMENTS

Safety of Phosphorus in cats

The FEDIAF Nutrition Working Group (NWG) is actively engaged in the scientific discussion around high intake of inorganic phosphorus compounds (such as NaH₂PO₄) and effects on indicators of kidney function in cats in collaboration with broadly recognized vet and pet nutrition experts in the field. Together the NWG and SAB reviewed the latest research on this topic published by Reynolds and colleagues¹. This new study provides additional support to the level of inorganic Phosphorous mentioned in the footnote in the Nutritional Guidelines. The paper will be included in the updated FEDIAF Nutritional Guidelines to be published in 2024.

FEDIAF participated as a sponsor at the ESVCN congress in Vila Real, Portugal

The 27th Congress of the European Society of Veterinary and Comparative Nutrition (ESVCN) Congress was held September 7th to 10th 2023 in Vila Real, Portugal. Leading the congress organisation this year was SAB member Prof. Ana Lourenço. FEDIAF continued its annual sponsorship of this congress and was present with a booth providing hard copies of the Nutritional Guidelines, as well as the Labelling Guide, and a selection of FEDIAF factsheets for attendees. The provision of materials was well appreciated by participants. The annual ESVCN provides another opportunity for many of the FEDIAF NWG and FEDIAF SAB to meet and engage with members of the ESVCN.

Initiation of collaborative work between SAB and NWG on creating new pet food fact sheets

SAB members together with NWG members have formed small working groups to work on new pet food fact sheets in the area of grain-free diets, insect based ingredients in pet food and the awareness about obesity incidence, risk factors and the need for weight management.



¹ Reynolds BS, Chetboul V, Elliott J, Laxalde J, Nguyen P, Testault I, Dorso L, Abadie J, Lefebvre HP, Biourge V. Long-term safety of dietary salt: A 5-year Prospective randomized blinded and controlled study in healthy aged cats (PEANUT study). *J Vet Intern Med.* 2024 Jan-Feb;38(1):285-299. doi: 10.1111/jvim.16952. Epub 2023 Dec 12. PMID: 38084870; PMCID: PMC10800216.

C. Analytical Science Working Group

INTRODUCTION

FEDIAF's mission is to facilitate the supply of safe and nutritious products. The importance of analytical methods continued to evolve through challenges prompted by changes in the regulatory landscape, external reports on contaminants or nutritional parameters. Additionally, the need for a clear view of method robustness or level of applicability to the additives re-authorization process remains present.

The working group on Analytical Science has developed to be a reference point for all topics and questions related to analytical methods.

OBJECTIVES

- One of the Group's missions is to provide internal advice to other working groups. In collaboration with the Nutrition Working Group, the group continued to provide expertise, views and opinions on an analytical method to measure inorganic Phosphorus developed by the University of Munich, to provide a reliable method for future reference.
- A second workstream that is being developed is in collaboration with the Additives Working Group, regarding analytical methods of gelling agents, which is a vital topic for the industry in general and FEDIAF specific.

ACHIEVEMENTS

Driving Industry recommendations on the developments and use of analytical methods

The Analytical Science Working Group will actively drive industry recommendations on the development and usage of analytical methods, and in this area the group is working on a roadmap for developing a gold standard method to measure acrylamide in pet food.

Providing expertise on analytical methods to the Industry

The Analytical Science Working Group continued to provide significant expertise relevant to the industry based on increasing engagement and participation in this workgroup, and the aim is to continue building position and output of the Analytical Science Working Group.



D. Product Communication Working Group

INTRODUCTION

The Product Communication Working Group comprises experts in the field of labelling and product communication. The team has excellent technical and legal expertise.

Pet Food Product Communication has been evolving over recent years. From a very simple pack with minimal information (mainly limited to mandatory declarations) to current product communication, which involves, not only more content-rich packs, but also TV-advertisements, complementary on-line information, colourful leaflets, etc.

In the last year, this working group has acted to ensure that the key priorities were tackled and well-represented to policymakers. Pet food, although under feed regulation, has its own specificities, which FEDIAF has to ensure are taken into account by the EU authorities.

OBJECTIVES

Organic Regulation

In order to avoid disruption of the EU organic pet food business, FEDIAF identified two issues:

- The addition of essential additives to the list of EU authorised additives for organic feed. This has been achieved after the publication of Regulation 2023/121.
- Specific organic feed labelling rules for pet food: as most pet foods are complete (i.e. all nutrients need to be included into the product) the organic feed rules would make it almost impossible to label organic pet foods, thus adapted specific rules for pet food would be needed.

ACHIEVEMENTS

Organic Regulation

The publication of Regulation 2023/2419 ‘On the labelling of organic pet food’, published in October 2023, takes into consideration the idiosyncrasy of pet food and provides specific labelling rules, very similar to the human food rules.

This achievement, resulting from almost 3 years of intense work, both by the secretariat and by a dedicated task force, will allow the pet food industry to continue growing the organic pet food business, without disruption and following a smooth transition from national rules to EU regulation.

Code of Good Labelling Practice

The Code of Good Labelling Practice for Pet food, endorsed by the EC, is a living document and needs to be maintained.

After the publication of the Regulation on organic pet food labelling, this new legal piece needs to be incorporated into the Code. Together with the latest Regulation on Feed for Particular Nutritional Purposes (PARNUTS), which will require an update on the chapter about these products’ labelling and other minor regulatory updates will generate a new updated version of the Code.

This updated Code will help manufacturers to properly communicate their products to consumers and consumers will have a standardize labelling which will ease their buying decision.

E. Environmental Sustainability Working Group

INTRODUCTION

FEDIAF's Environmental Sustainability Working Group (ESWG) has been an integral part of FEDIAF since 2019, working with decision-makers around Europe and is a trusted voice on sustainability issues in the pet food sector.

In 2023, FEDIAF built upon its role as a responsible stakeholder in the EU's Green Deal debate and worked towards better regulation in packaging and packaging waste, and on the substantiation of environmental claims while continuing to work on pilot projects with the JRC (Joint Research Council) and experts on PEF (Product Environmental Footprint).

OBJECTIVES

- Promote the responsible use of resources from farm to bowl and minimise the sector's environmental impact whenever possible.
- Collaborate with authorities, regulators, academics, and other related stakeholders and contribute efficiently to policy shaping.
- Ensure that a favourable framework for more sustainable pet food production is adopted.

ACHIEVEMENTS

Packaging legislative framework

As in previous years, FEDIAF requested via a letter to DG GROW and DG ENVI to intervene against any national provisions on packaging that fail to comply with the EU Single Market's principles. The lack of harmonization is an important issue to our members and we kept monitoring the different initiatives at National and European Commission level.



In 2022, the European Commission published its proposal for the Packaging and Packaging Waste Regulation (PPWR) (an update on the earlier directive PPWD) in order to harmonize legislation across Member States.

In April 2023, FEDIAF, alongside more than 120 packaging industry organisations co-signed a joint letter urging co-legislators to preserve, in its entirety, the internal market legal basis of the PPWR, confirming this was the best way to achieve the environmental and economic objectives of the proposal.

The Commission proposal has now been amended by both EU Parliament and Council, and a joint text has been agreed. Parliament has formally adopted the agreement and when Council adopts the text later in 2024, the proposals will become law.

FEDIAF has continued to assess this proposal throughout and has given MEPs voting advice, our industry's position, and wider advocacy through engagement with our umbrella organization, FoodDrinkEurope, and the EU packaging chain forum.

Our advocacy played a part in removing amendments from the plenary vote, which would have had a significant impact on our sector regarding reuse targets due to the inconsistency with Regulation 142/2011, which requires that 'processed pet food must be packaged in new packaging'.

FEDIAF members are committed to achieving the objectives defined by PPWR. The European Commission proposal is a great opportunity to encourage harmonization across the EU and we thank decision-making bodies for having taken into account the interests of the 90 million pet keeping households in the EU.

Green Claims Directive

FEDIAF had hoped that the EU Commission would propose a Regulation on the substantiation of environmental claims, but in March 2023, the Commission proposed a Directive instead. Our concern has been that, left to member states' implementation of a Directive, the industry would be faced with a patchwork of differing laws and schemes.

The ESWG drafted a position paper calling for a harmonized approach to legislation and the adoption, where possible, of an accepted approach to benchmarking and verifying environmental claims. FEDIAF believes that where Produce Environmental Footprint Category Rules (PEFCRs) have been developed in a sector, that should become the benchmark for any claims made.

FEDIAF has contacted MEPs on the ENVI and IMCO committees in the European Parliament to make recommendations on improving the proposed text and circulated our Position Paper calling for robust substantiation & credible comparability of Green claims for consumers.

Product Environmental Footprint Category Rules (PEFCR) for the pet food industry

The validation of the PEFCR in 2018 was a milestone for FEDIAF and members. PEF is a credible, robust and accessible methodology that was developed to help members to assess the environmental impact of their pet food products.

Early in 2023, FEDIAF received a new dataset provided by the European Commission in order to proceed with the update of its PEFCRs. FEDIAF organized its Technical Secretariat and External Independent Review Panel in 2023, which includes LCA, Industry and NGO experts. The review of the PEFCR in the pet food sector is now near completion and should be agreed Q3 2024.

In March FEDIAF hosted a webinar on the PEF, with FEFAC, UK Pet Food and Wageningen University as guest speakers. FEDIAF also co-signed a letter to DG SANTE to reiterate strong support for the Product Environmental Footprint (PEF) methodology in view of upcoming Green Claims proposal from the European Commission.

Protecting Category 3 Animal Fat by-products

As part of the European Green Deal, the EU adopted even more ambitious climate goals, setting a target of -55% greenhouse gas (GHG) emissions by 2030 and a long-term goal of net zero GHG emissions by 2050.

FEDIAF welcomes the ambitious climate package and supports mainstreaming of renewable energy across all economic sectors. The EU institutions finalized the text of the Renewable Energy Directive Re-Fuel proposals in the spring of 2023 – focusing on the use of sustainable fuels in aviation and maritime transport. This directive will now need to be implemented in EU member states' legislation.

During the discussions, FEDIAF members worked intensively on this issue. We had identified a serious risk for the sustainability of our industry with regards the carbonization of transport: the use of Category 3 fats by-products (CAT 3) as biofuels. CAT 3 by-products are key ingredients to produce pet food. FEDIAF firmly believes that food, not intended for human consumption, should be used in pet food first, which sits well above energy use in the EU's own waste hierarchy. Other types of animal fats, such as animal by-product category 1 and 2 animal fats, which do not meet the necessary standards for use in pet food, due to safety reasons, are much more suitable for use in biofuels.

Unfortunately, the failure to safeguard Category 3 animal fats from use in EU biofuels could trigger a higher carbon footprint for the pet food sector, as less sustainable feedstocks might be used to fill the gap.

In 2023, FEDIAF organised a workshop on Category 3 animal fats for National Associations, sharing the toolkit for use in member states. FEDIAF also met with key stakeholders and we developed several articles, a video, press releases and joint statements with the aim of educating policy makers about the impact these different files might have on the pet food sector. FEDIAF will continue to advocate for Category 3 by-products to be used according to the EU material waste hierarchy criteria, which is in line with the Circular Economy ambitions of the EU.

F. Feed Material and Trade Working Group

INTRODUCTION

The Feed Material and Trade Working Group comprises industry experts with a specific focus on plant and animal derived raw materials plus a knowledge of trade and its potential restrictions.

The rules for animal derivatives are covered by the Animal By-Products Regulations. There are over 350 pages of stringent rules and provisions safeguarding human and animal health, in addition to establishing the legal framework for sourcing safe raw materials for our industry, which requires every proposed amendment to be scrutinised very carefully to ensure that it is acceptable for the pet food industry. The working group follows parallel regulatory developments in the UK to support frictionless trade. As the closest 3rd country without SPS (Sanitary and Phytosanitary Measures) agreement, any differences could create non-tariff barriers.

To ensure that no feed materials are forgotten, the working group also monitors any developments on the EU feed material catalogue and register, and specific incidents highlighted via the RASFF (Rapid Alert System for Food and Feed) system.

As a group we build on the experience and insight of our members to identify potential issues. Sometimes a simple 'and' or 'or' in the legal text can make all the difference.

OBJECTIVES

Maximise opportunities for FEDIAF members to market their products:

- Ensure that valuable feed materials can be used by the pet food industry.
- Establish the right sourcing and processing standards to protect animal and public health.
- Facilitate intra and inter community trade (non-tariff barriers; customs codes).

ACHIEVEMENTS

Brexit: The practical implications & keeping stakeholders talking

As FEDIAF together with The Pet food Association of Ireland (PFI), FACCO and UK Pet Food we were able to keep the conversation going. We highlighted the plight of the industry when shipping from A to B and emphasized the need for a common sense solution based on the same text of Animal by-products regulation that is valid in the EU and in the UK (under retained law).

The working group will continue to be a platform for sharing technical insights between members and UK Pet Food to ensure that no further details become a stumbling block for members wishing to trade with the UK (or more precisely Great Britain).

As a working group, we continue to closely monitor all developments with regards to import conditions under the Border Target Operating Model that has been issued by the UK government. We will also continue to focus on monitoring any potential regulatory divergence going forward. Only by working together in close cooperation with UK Pet Food, and other interested stakeholders, will we be successful in shifting stumbling blocks due to uncertain rules and their interpretation.

Going forward, the focus will be on the additional labelling rules introduced by the Windsor framework. Together with UK Pet Food, we hope to work on a fit for purpose time frame to implement the rules that are unlocking trade between GB and Northern Ireland.

Cooperating with legislators

- The working group was the key platform to facilitate communication between the member state competent authorities and 3rd country authorities to enable continuous trade. This includes regular presentation at the EU Market access working group, to ensure that pet food stays at the forefront of the regulators minds when it comes to opening new markets for animal derived products.

The group has worked on:

- Key EU export markets: Monitoring developments and highlighting opportunities for improving cross border trade. Explaining to the EU commissions stakeholders that their continuous support matters a lot to the industry.
- EU Animal By-Products Regulation & TSE Regulation: Monitoring developments and ensuring a proportionate regulatory environment.

Opportunities further afield

The group has also been looking at opportunities on the other side of the globe now that the EU launched negotiations for agreements with Australia, Saudi Arabia and India. These will be one of the key focal points for the years to come.

G. Small Pets Working Group

INTRODUCTION

FEDIAF members manufacture food for all pets, including small mammals, ornamental birds, ornamental fish and others. For these, specific topics or discussions can arise that are not covered in detail by other existing working groups.

In order to cover these topics, FEDIAF has established a Small Pets Working Group. This working group looks at the interests of all companion animals apart from cats and dogs. It represents a wide range of manufacturers across the membership who cater for a large number of different species.

OBJECTIVES

- Represent interests of pets other than cats and dogs with respect to legislative pet food issues.
- Develop nutritional guidelines for a wide range of new species including goldfish, pet birds, guinea pigs, etc.
- Produce educational resources for pet care professionals and pet owners.
- Provide expertise on nutrition for small pets, including exotic species.

ACHIEVEMENTS

In 2023 the Small Pets Working Group continued work on nutritional guidelines for rabbits and ornamental fish. These guides will be expanded in 2024 to include guinea pigs and, later, pet birds.



H. Communications Working Group

INTRODUCTION

The Communications Working Group continues to increase the visibility of FEDIAF as the responsible voice of the European pet food industry by promoting the three pillars: nutritional expertise, our sustainable credentials and the benefits of pets in society. It also collaborates to support specific working group activities.

We have continued to manage communications across a wide range of platforms and formats: website, events, newsletters, press releases, statements, factsheets, and our presence on LinkedIn and X.

OBJECTIVES

To support the Technical WGs to:

- Promote FEDIAF's scientific and technical expertise
- Communicate FEDIAF's commitment to the environment and the Industry's sustainable credentials

And also:

- To share the benefits of pet interaction and ownership in addition to supporting pet welfare
- To prepare the Association's Communication plan

ACHIEVEMENTS

Developing a Manifesto and supporting development of stakeholder outreach plan

The Communications Working Group coordinated input from other technical working groups and developed copy for a new Manifesto outlining the Industry's 'asks' of policy makers and stakeholders. We also began to coordinate relevant stakeholder events to enhance presence of the FEDIAF in Brussels circles before and post elections, including the presentation of manifesto and introduction of a new Secretary General.

Increasing Collaboration with the Pet Alliance

In September 2023, alongside our fellow founding partner AnimalhealthEurope, we welcomed two new partners FVE (Federation of Veterinarians of Europe) and FECAVA (Federation of European Companion Animal Veterinary Associations) to the Pet Alliance.

At the annual event at Townhall Europe, we welcomed over 100 guests including Members of the European Parliament, Commission and Council, animal welfare organisations, assistance animal associations and pet industry stakeholders plus many four-legged friends, to celebrate #PetPower.

We also had the privilege of hosting guest speaker, Mitja Sedlbauer, Policy Officer from the European Commission's DG SANTE who provided updates on the ongoing revisions in EU animal welfare legislation.

Updating our 'Pets in Society' page

We updated the content of our website dedicated to summarizing the scientific research about the benefits of pet interaction. With content updated to reflect new research, the page grew by 100% to include over 100 pieces of research.

Social Media and Press Articles

Over the year, FEDIAF's followers on LinkedIn have increased by over 2000 to over 8500 followers – around 30% growth. FEDIAF has contributed features for EspeciesPRO and Nordic PetXpert, Pets International, Feed Additives, European Supermarket Magazine and All Pet Food. The association also circulated press releases on several topics, such as publishing new Facts & Figures report, Annual Congress, joint statements on Category 3 animal fats, positions on PPWR and Green Claims developments and most recently welcoming a new Secretary General and Manifesto launch.

Cementing the Animal Welfare Task Force

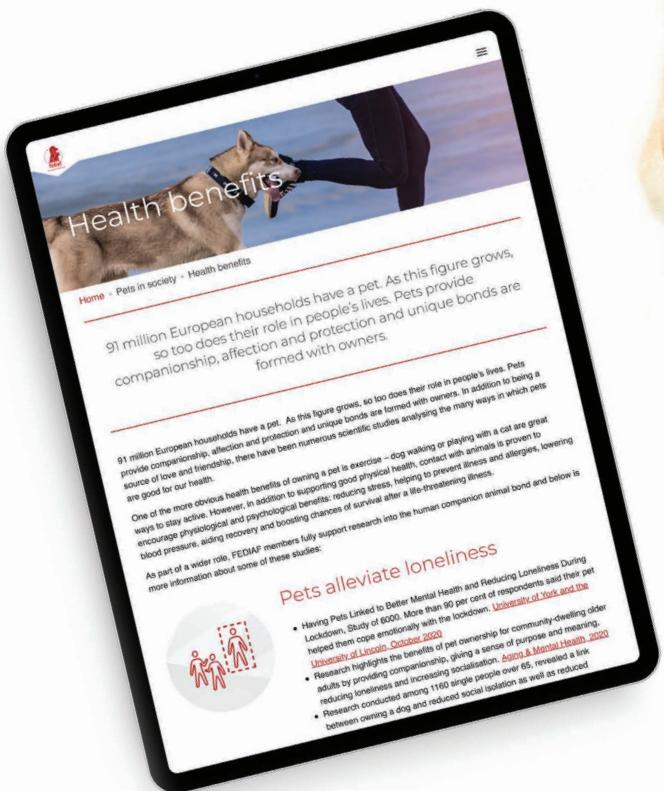
From its establishment at the end of 2022, the AWTF has met regularly to monitor legislative developments with the aim of influencing content affecting our industry and its objectives.

The Animal Welfare Task Force finalized a proactive statement on companion animals, which is published on the website, as well as a reactive statement on farm animals.

The taskforce has been meeting some pet ecosystem stakeholders to understand the different perspectives and work with regards to the EU animal welfare revision law and more: Four Paws, Eurogroup for Animals, the IPFD, Animal Health Europe and a representative of the voluntary initiative from the EU platform on animal welfare.

Finally, the taskforce has been leveraging the expertise within FEDIAF in nutrition and responded to the EC Consultation on Companion Animal Welfare.

Indeed, in December 2023, a first proposal of regulations aimed at safeguarding the welfare of commercially bred dogs and cats in the EU was published. The proposed regulations encompass stringent standards for breeding, housing, care, and marking, with a particular focus on combatting the illegal trade of pets.



Governance and Structure

FEDIAF is the trade body representing the European pet food industry. We work with our members and collaborate with authorities, regulators, and academics to ensure favourable conditions for the supply of safe, nutritious, and palatable products.

We work through a committee structure and the Secretariat works closely with the Communications Working Group, Review Committee and Executive Committee – reporting to the General Assembly. We also have a Board of Directors who meet monthly.

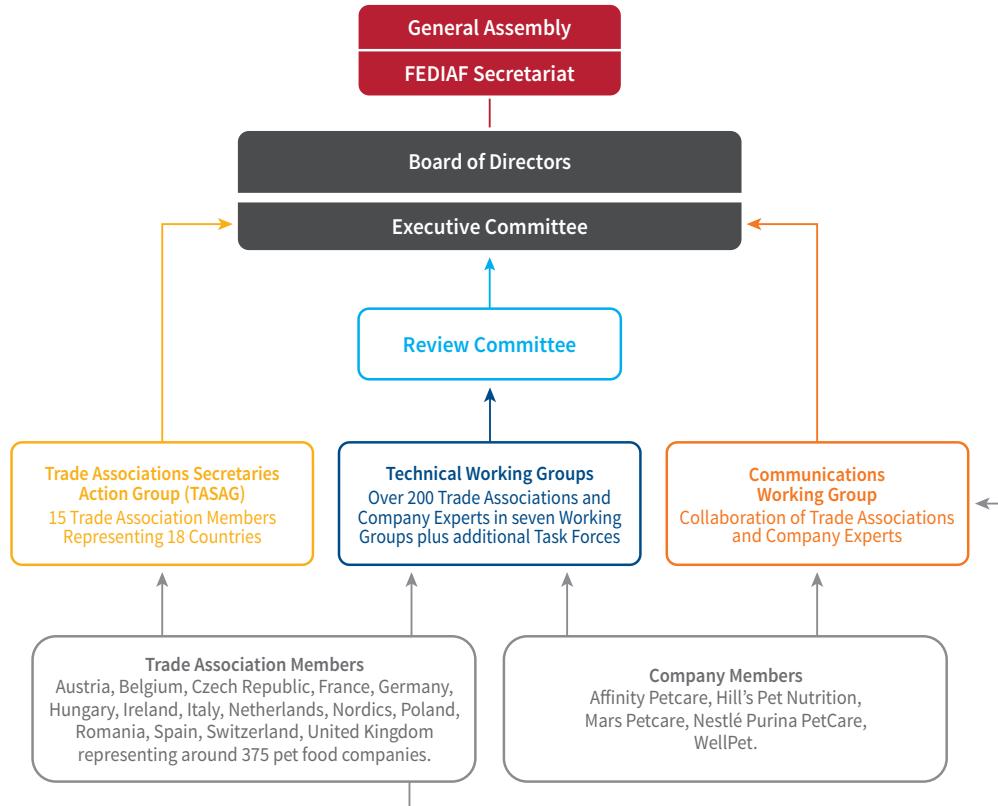
The Executive Committee and the General Assembly are chaired by the FEDIAF President, elected every two years. The President of FEDIAF since June 2022 has been Rosa Carbonell.

Our Review Committee – led by two co-chairpersons to coordinate the working groups and to give political leadership and guidance – looks at:

- Additives and Undesirable Substances
- Product Communication
- Nutrition
- Analytical Science
- Feed Materials and Trade
- Environment and Sustainability
- Small Pets

We are supported by the National Associations (TASAG – Trade Associations Secretaries Action Group) and Communications Working Group.

FEDIAF STRUCTURE



Committees, Working Groups and Task Force Members

BOARD OF DIRECTORS

FEDIAF President: Rosa Carbonell - Nestlé Purina PetCare
Vice-President: Christophe Carlier – FACC
Vice-President: Jürgen Wigger – IVH
Treasurer: Annet Palamba – NVG
Victor Romano – ANFAAC

EXECUTIVE COMMITTEE

Executive Committee Chair: Rosa Carbonell - Nestlé Purina PetCare
Vice-Chair: Christophe Carlier – FACC
Vice-Chair: Jürgen Wigger – IVH
Annet Palamba – NVG
Attila Sofalvi – FHFI
Jean Grunenwald – POLKARMA
Florian Wastl – Mars Petcare
Greg Van Praagh – UK Pet Food
Hermann Habe – ÖHTV
Irina Derksen – Hill's Pet Nutrition
Jana Burajová – SVPDZ
Josep Crusafont – Affinity Petcare
Katrin Langner – TASAG representative
Lina Lopez – WellPet
Mindaugas Rupsys – Mars Petcare (Co-chair Communications WG)
Simone Mezzanotte – ASSALCO
Robin Balas – Royal Canin (Co-Chair Review Committee)
Shane Lyster – PFAI
Sharon Schroevers – BEPEFA
Terkel Due – NPFA
Tisa Kosem – Nestlé Purina PetCare (Co-chair Communications WG)
Urs Eberhard – VHN
Victor Romano – ANFAAC
Yvan Tomaselli – Nestlé Purina PetCare (Co-Chair Review Committee)

REVIEW COMMITTEE

Co-Chair: Robin Balas – Royal Canin
Co-Chair: Yvan Tomaselli – Purina PetCare
Åsa Dufva – PPFEurope (Nordics)
Astrid Schuijlenburch – Royal Canin
Attila Gyopar – Nestlé Purina PetCare
Celina Torre – Affinity Petcare
Donna Snellgrove – Mars Petcare
Eva Ruiz – Royal Canin
Ingrid Van Hoek – Royal Canin
Irina Derksen – Hills Petcare VHN
Isabelle Kalmar – Versele-Lega
Izabella Balanyiné – PPFEurope (HPFA)
Jean-Louis Paillot – Nestlé Purina PetCare
Josep Crusafont – Affinity Petcare
Karen Elizabeth Linley – Mars Petcare
Lina Lopez – WellPet
Melinda Magdus – Royal Canin (HPFA)
Maria Otero Garcia – Wellness Pet
Matthew Elliot – Mars Petcare
Monika Prenner – Nestlé Purina PetCare (UK Pet Food)
Nicole Rabehl – Vitakraft (IVH)
Paula Carolina Wartelski – Nestlé Purina PetCare
Pierre Jaouen – Sopral (FACC)
Stefano Zigoito – Hills Petcare (ASSALCO)
Thomas Brenten – Saturn Petcare
Ursula Huber – Mars Petcare (ÖHTV)
Victor Romano – Affinity (ANFAAC)
Willeke Stroucken – PPFEurope (NVH)
Yvan Tomaselli – Nestlé Purina PetCare

Committees, Working Groups and Task Force Members

TRADE ASSOCIATIONS SECRETARIES ACTION GROUP (TASAG)

Chair: FEDIAF/ IVH

Antonella Baggini – ASSALCO

Attila Voros – FESZ

Aurélie Bynens – FACCO

Barbara Lovas-Bíró – FESZ

Benita Beekhof – NVG

Donna Holland – UK Pet Food

Elien Van Stichel – BEPEFA

Emmenegger Stefan - VHN

Hege Rosenhaug – Nordics

Katrin Langner – IVH

Lucian Lumezeanu – ARPAC

Maciej Przedzziak – POLKARMA

Magda Hrbcová - SVPDZ

Michael Bellingham – UK Pet Food

Pablo Hervas – ANAAC

Robert Kiernan - IBEC

Santiago de Andres – ANAAC

Sofie Barsøe – Nordics

Stine Vhile – Nordics

Stéphanie Roux – FACCO

Terkel Due – Nordics

Tamara Rudavsky – ÖHTV

Frank von der Brüggen – PetCom Tierernährung

Gerd Grossheider – Gimborn

Jean-François Savard - Nestlé Purina

Luisa Vierbaum – Rondo Food

Mindaugas Rupsys – Mars Petcare

Oriol Baulenas – Affinity

ADDITIVE AND UNDESIRABLE SUBSTANCES WORKING GROUP

Chair: Matthew Elliott – Mars Petcare

Vice-Chair: Amelie Serment / Hilke Seyffarth – Nestlé Purina

PetCare

Aline Hartman – Nestlé Purina PetCare

Audrey Sauthier – Nestlé Purina PetCare

Aline Hartman – PPF Europe

Boris Terlinden – Rondo Food

Donna Holland – UK Pet Food

Emanuel Fischbacher – Bosch Tiernahrung

Gert Grossheider – Gimborn

Irina Derksen – Hill's Pet Nutrition

Jerome Naar – Royal Canin

Martin van Bohemen – Hill's Pet Nutrition

Marina Stoeckel – Saturn Petcare

Martin Kaczcará – Hill's Pet Nutrition

Michael Alvermann – Deutche-tiernahrung

Pablo Belmar von Kretschmann – Royal Canin

Paula Carolina Wartelski – Nestlé Purina PetCare

Pierre Jaouen – Sopral

Ursula Huber – Mars Petcare

Victor Romano – Affinity Petcare

Viviana Fadino – Nestlé Purina PetCare

COMMUNICATION WORKING GROUP

Co-Chair: Mindaugas Rupsys – Mars Petcare

Co-Chair: Tisa Kosem – Nestlé Purina PetCare

Antonella Baggini – ASSALCO

Balázs Pályi – Mars Petcare

Debby van Son – NVG

Eva Ruiz – Royal Canin

Isabel Buil – Affinity Petcare

Laureline Malineau – Royal Canin

Nicole Paley – UK Pet Food

Chair: Lisa Conboy – Nestlé Purina PetCare

Vice-Chair: Ingrid Van Hoek – Royal Canin

Ariane Wehrmaker – Saturn Petcare

Astrid Schuijlenburch – Royal Canin

Britta Lammers – Mars Petcare

Catherine Bogaert - Teract

Celina Torre – Affinity Petcare

Christina Germain - Nestlé Purina PetCare

Francis Pastoor – Dechra

ANIMAL WELFARE TASK FORCE

Co-Chair: Laureline Malineau – Royal Canin

Co-Chair: Tisa Kosem – Nestlé Purina

Andrea Bauer – Royal Canin

Barbara Thiel – Bewital

Christophe Carlier – Royal Canin

Committees, Working Groups and Task Force Members

PRODUCT COMMUNICATION WORKING GROUP

Chair: Victor Romano – Affinity Petcare

Vice-Chair: Monika Prenner – Nestlé Purina PetCare

Andreas Thoben – Vitakraft

Aurélie Bynens – FACCO

Aurelien Goliard – Nestlé Purina PetCare

Balázs Pályi – Mars Petcare

Frauke Schibilla – Vitakraft

Henning Beckmann – IVH

Ilaria Pesci – Royal Canin

Ines Munzelfeld – Mars Petcare

Irina Derksen – Hill's Pet Nutrition

Klaus Tesch – Saturn Petcare

Laetitia Rouillé – Nestlé Purina PetCare

Lotte van Rooijen – Afbinter National

Manou Goeminne – Versele-Lega

Marco Halfé – Queens Products

Maria Luisa Valentini – Nestlé Purina PetCare

Marina Stoeckel – Saturn Petcare

Martin Kaczbara – Hills Petcare

Michael Alvermann – Deutsche Tiernahrung

Monika Prenner – Nestlé Purina PetCare

Monika Vavrova – Hill's Pet Nutrition

Pierre Jaouen – Sopral

Shane Lyster – PFAI (Ibec)

Stéphane Peeters – Spectrum Brands

Willeke Stroucken – PPF Europe

Tommaso Mechelli – Affinity Petcare

Victor Romano – Affinity Petcare

ENVIRONMENTAL SUSTAINABILITY WORKING GROUP

Chair: Eva Ruiz – Royal Canin

Vice-Chair: Paula Wartelski – Nestlé Purina PetCare

Ales Weiner – PPFEurope

Amaya Lopez Sastre – Petselect

Balázs Pályi – Mars Petcare

Cedric Moulin – Nestlé Purina PetCare

Caroline Ritteser – Bewital

Christian Schunemann – IVH

Daniela Peloponese – Hill's Pet Nutrition

Eva Ruiz – Royal Canin

Fabrice Mathieu – Royal Canin

Franz Kainz – Ospelt

Irina Derksen – Hill's Pet Nutrition

Izabella Balanyiné – PPF Europe

Karen Elizabeth Linley – Mars Petcare

Laetitia Rouillé – Nestlé Purina PetCare

Lisa Conboy – Nestlé Purina PetCare

Luiz Dias – Affinity Petcare

Maria Otero Garcia – Wellness Pet

Mireia Garcia – Affinity Petcare

Nicole Paley – UK Pet Food

Paul van der Raad – Protix

Pierre Martinez – Virbac

Stéphanie Roux – FACCO



The FEDIAF Secretariat Team



SONIA FRANCK
SECRETARY GENERAL, FEDIAF
(2024 – PRESENT)

Sonia Franck is an accomplished professional with over 30 years of extensive experience across various sectors and now the pet food industry. With a solid educational background, Sonia holds an Executive MBA in Innovation, a Master's 2 degree in Business Administration, a Bachelor's degree in Science, as well as a Health Economics and Policy Certificate from the London School of Economics.

Prior to her current position as Secretary General at FEDIAF, Sonia was instrumental in driving significant transformation as the Secretary General of IML Innovative Medicines Luxembourg. Sonia's career has seen her actively engaged at the EU level within the Pharmaceutical sector, where her insights and contributions have shaped industry practices and policies.



ALICE TEMPEL COSTA
DEPUTY SECRETARY GENERAL &
TECHNICAL DIRECTOR, FEDIAF
(2020 – PRESENT)

Alice Tempel Costa, holds a BSc in Agriculture from UFRGS, Brazil and a master's degree in Cooperation & Development from IUSS University in Pavia, Italy. She has over ten years' experience in European Trade Associations in Brussels.

Before joining FEDIAF in September 2020, she worked for DG AGRI at the European Commission, FAO, Embrapa (The Brazilian Agricultural Research Corporation) and Wageningen University.



ALEKSANDRA PRANDOTA
EU POLICY AND REGULATORY AFFAIRS
MANAGER (2023 – PRESENT)

Aleksandra has a PhD in Agricultural Sciences specialising in nutrition and food technology from Warsaw University of Life Sciences where she also obtained a Master's Engineer degree in Commodity Studies. Additionally, she graduated from Wageningen University with a MSc in Food Safety and a Bachelor degree in International Relations from the Warsaw School of Economics. Aleksandra has over 15 years of experience working for both public and private sectors.



FEDIAF Membership

FEDIAF has 15 members associations and five company members (Affinity Petcare, Hill's Pet Nutrition, Mars Petcare, Nestlé Purina PetCare and Wellpet), representing 18 countries.

öhtv

AUSTRIA

öhtv

Österreichische Heimtierfuttermittel Vereinigung
c/o Fachverband der Nahrungs- und Genussmittelindustrie
Zaunergasse 1 – 3
1030 Wien
Austria
T: +43 1 7122121 0
E: info@oehtv.at
www.oehtv.at



BELGIUM

BEPEFA

Belgian Pet food Association
Rue de l'Hôpital, 29
1000 Bruxelles
Belgium
E: info@bepefa.eu
www.bepefa.eu



CZECH REPUBLIC

SVPDZ

Sdruzeni vyrabcu potravy pro domaci zvirata
Prazska 320
257 21 Porici nad Sazavou
Czech Republic
E: svpdz@svpdz.cz
www.svpdz.cz



FRANCE

FACCO

Chambre syndicale des fabricants d'aliments pour chiens, chats, oiseaux et autres animaux familiers
46, Boulevard de Magenta
75010 Paris
France
T: +33 1 48 03 29 11
E: facco@facco.fr
www.facco.fr



DENMARK

Finland/Norway/Sweden

NPFA

Nordic Pet Food Association
Havnegade 39
1058 København
Denmark
T: +45 33 13 92 92
E: indsigt@mldk.org
www.npfa.dk



GERMANY

IVH

Industrieverband Heimtierbedarf e.V.
Emanuel-Leutze-Strasse 11
40547 Duesseldorf
Germany
T: +49 211 59 40 74
E: info@ivh-online.de
www.ivh-online.de

FEDIAF Membership



HUNGARY

FHFI

Federation of Hungarian Food Industries
Bécsi út 126-128
1034 Budapest
Hungary
T: +36 30 197 53 88
E: barbara.lbiro@elelmiszeripar.hu
www.elelmiszeripar.hu



ITALY

ASSALCO

Associazione Nazionale tra le Imprese
per l'Alimentazione e la Cura degli
Animali da Compagnia
Largo Chigi, 5
00187 Rome
Italy
T: +39 06 69 20 08 98
E: assalco@assalco.it
www.assalco.it



POLAND

POLKARMA

Polish Pet Food Manufacturers'
Association
ul. Woronicza 31/152,
02-640 Warszawa
Poland
T: +48 22 646 88 18
E: sekretariat@polkarma.pl
www.polkarma.pl



IRELAND

PFAI – Pet food Association of Ireland

Ibec
84-86 Baggot Street Lower
Dublin 2
D02 H720
Ireland
T: +353 1 605 1500
www.fooddrinkireland.ie
www.ibec.ie



NETHERLANDS

NVG

Nederlandse Voedingsindustrie
Gezelschapsdieren
Reitseplein 1
5037 AA Tilburg
Netherlands
T: + 31 183 64 50 23
F: + 31 183 62 11 61
E: nvg@atriumgroep.nl
www.nvg-diervoeding.nl



ROMANIA

ARPAC

Asociatia Romana a Producatorilor de
Hrana pentru Animale de Compagie
Str. Stirbei Voda, 26-28
Union International Center II
9th Floor, sect. 1
Bucharest
Romania
E: office@arpac.ro
www.arpac.ro



SPAIN

ANFAAC

Asociación nacional de fabricantes de alimentos para animales de compañía
c/ San Agustín, 15-1º derecha
28014 MADRID
Spain
T: +34 91 369 21 34
F: +34 91 369 39 67
E: anfaac@anfaac.org
www.anfaac.com

vhn

Verband für Heimtiernahrung
Société pour l'alimentation des animaux familiers

SWITZERLAND

VHN

Verband für Heimtiernahrung VHN
Swiss Pet Food Association
Thunstrasse, 82
Postfach 1009
CH-3000 Bern 6
Switzerland
T: +41 31 356 21 21
E: info@vhn.ch
www.vhn.ch



UNITED KINGDOM

UK Pet Food (The Pet Food Manufacturers' Association)
Aviation House, 125 Kingsway
London WC2B 6NH
United Kingdom
T: +44 207 379 9009
F: +44 207 836 7409
E: info@ukpetfood.org
www.ukpetfood.org



Affinity Petcare

Plaça d'Europa, 54-56,
08902 L'Hospitalet de Llobregat
Spain
www.affinity-petcare.com/en



Hill's Pet Nutrition

Grabetsmattweg
4106 Therwil
Switzerland
www.hillspet.com

MARS

Mars Pet Care

Eitzer Str. 215
27283 Verden
Germany
www.mars.com



Nestlé Purina PetCare

Nestlé Purina PetCare Europe
Av. Nestlé 55
1800 Vevey
Switzerland
www.purina.eu



WellPet

WellPet Belgium BVBA
Leonardo da Vincielaan 19
MC Square
1831 Machelen, Diegem
Belgium
www.wellnesspet.com

European Pet Food Data: An Updated and Robust Approach

FEDIAF's Facts & Figures are highly regarded throughout Europe and are frequently referenced and quoted by authorities, stakeholders and the media. We were particularly delighted when the Commission quoted our pet population during discussions on proposed companion animal welfare legislation.

With this recognition comes a responsibility to ensure our approach is robust and thorough. This year, we have undertaken a comprehensive update, collaborating with an external data expert at Soulor Consulting to meticulously review both the pet population and market data.

This year, as per tradition, we have liaised with all 15 of our National Association members who have supplied us with their local population figures and market data – where available. Soulor Consulting has then undertaken a rigorous overview, aligning data and implementing additional layers of verification against previous records, inflation figures and other relevant metrics.

It's important to note that we have revised the timeframe for data collection, now gathering information from two years prior to publication. Therefore, in 2024, we will be publishing 2022 data. Due to this shift and the methodology update, we advise against comparing year-on-year data. However, this adjustment ensures consistency moving forward, allowing for reliable comparisons in the future.

For further insights into our methodology, detailed notes are available in our Appendix, providing transparency and clarity regarding our data collection and analysis processes.



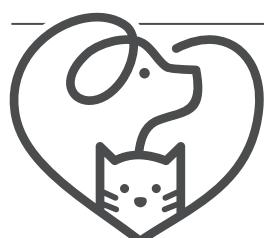
Facts & Figures

European Overview 2022



TOTAL POPULATION EXCLUDING AQUARIA: 329M

TOP PETS IN EUROPE



166m
households in Europe
have a pet

50%
of households own
a pet

25%
of households own at
least one dog

27%
of households own at
least one cat



29.2 ANNUAL SALES OF PET FOOD PRODUCTS (€bn)

9.9 ANNUAL VOLUME OF PET FOOD PRODUCTS
(Millions Tonnes)

2% ANNUAL GROWTH IN VOLUME (Max)

9% ANNUAL GROWTH OF INDUSTRY

24.6 RELATED SERVICES AND PRODUCTS
(Accessories and Services) €bn

9% GROWTH IN SERVICES AND PRODUCTS



375 NUMBER OF PET FOOD COMPANIES

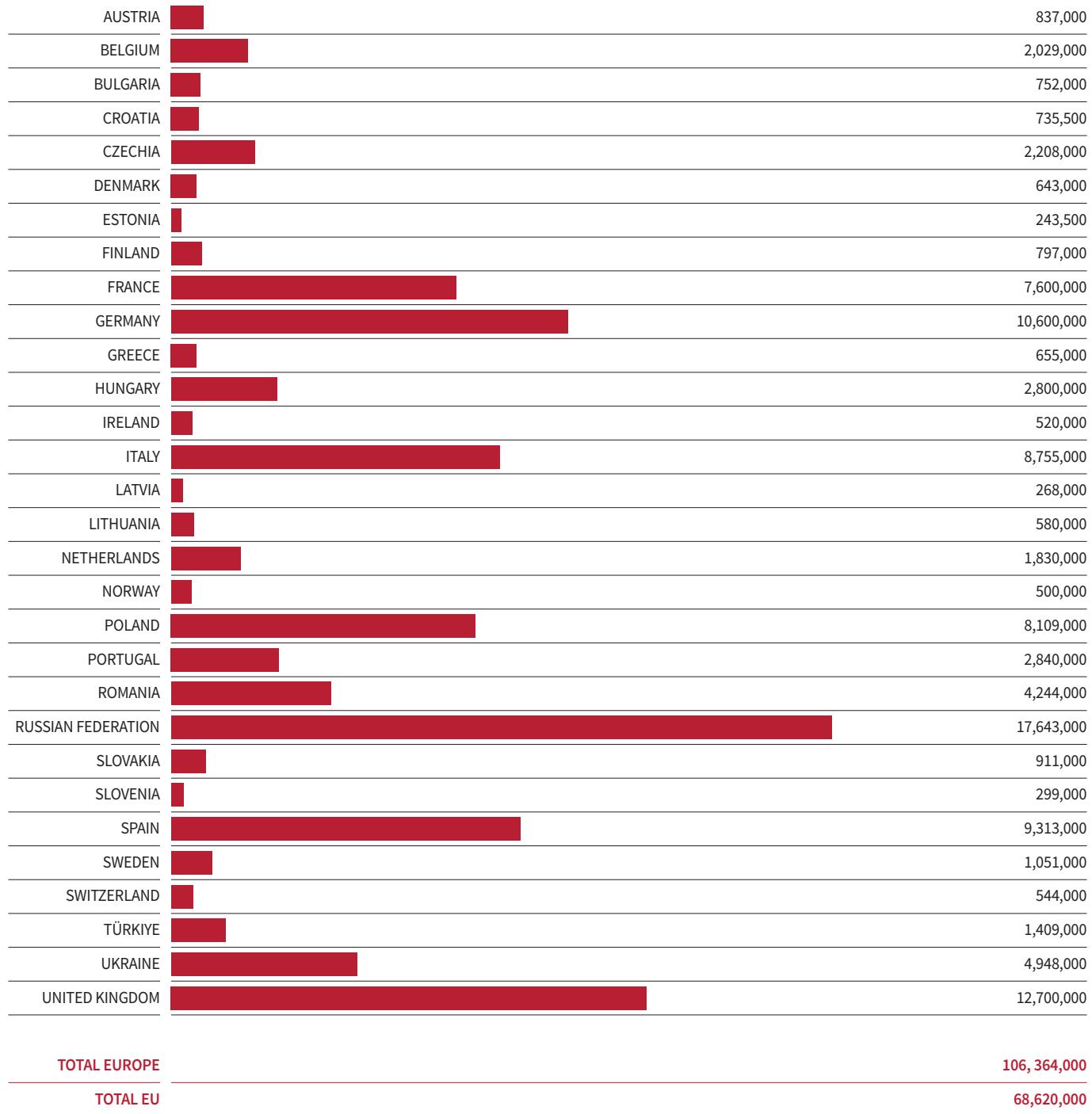
480 ESTIMATED NUMBER OF PLANTS

283,000 DIRECT EMPLOYMENT

2,300,000 INDIRECT EMPLOYMENT

Data sourced via FEDIAF's National Association members and aligned by Soulor Consulting.
For more information on our methodology, please read the Appendix.

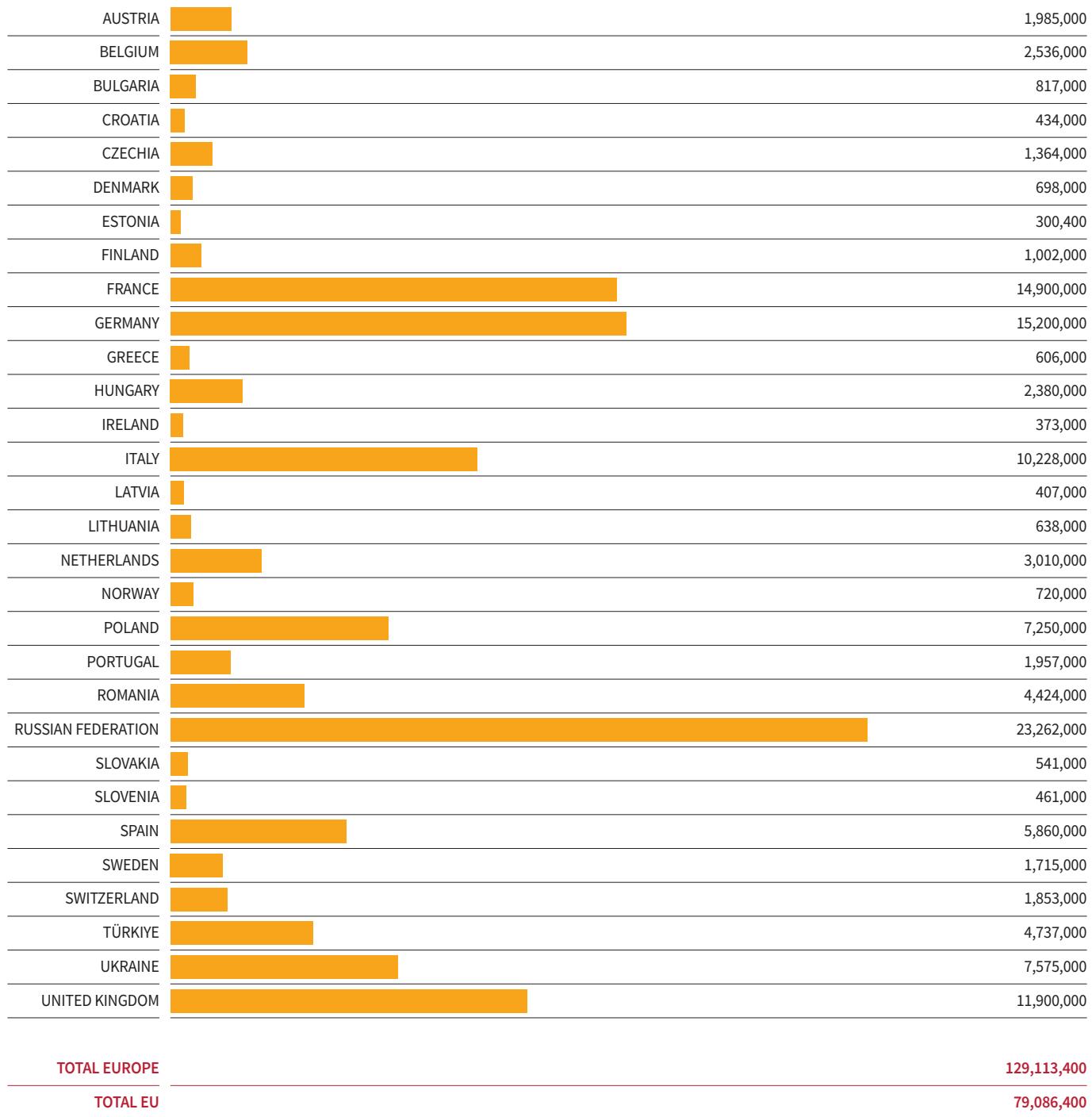
Facts & Figures: European Dog Population



Data sourced via FEDIAF's National Association members and aligned by Soulor Consulting.
For more information on our methodology, please read the Appendix.



Facts & Figures: European Cat Population



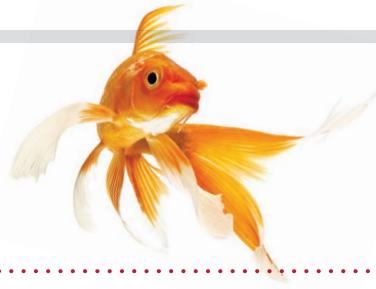
Data sourced via FEDIAF's National Association members and aligned by Soulor Consulting.
For more information on our methodology, please read the Appendix.

Facts & Figures: European Ornamental Bird Population

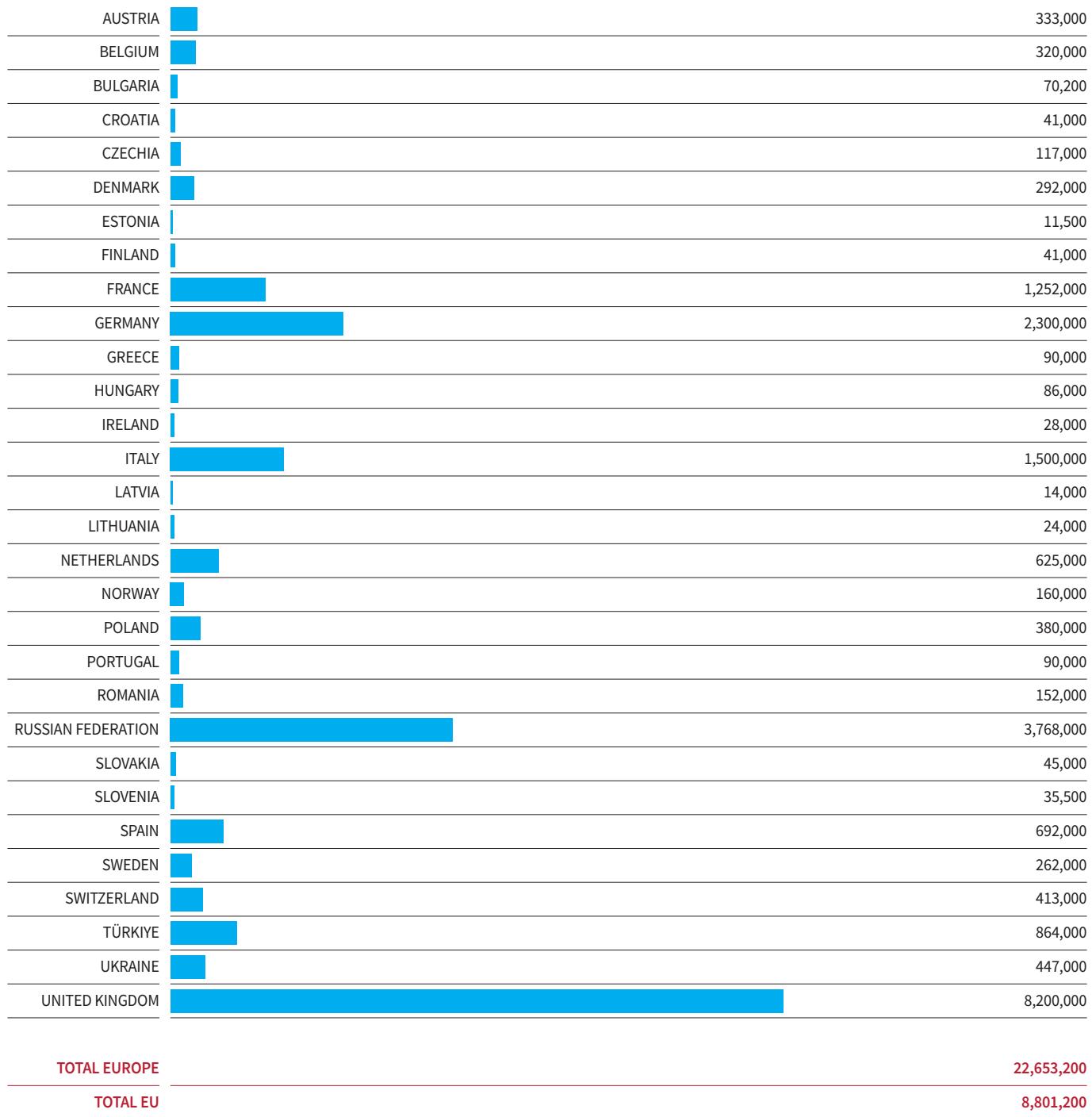


AUSTRIA	141,000
BELGIUM	331,000
BULGARIA	45,000
CROATIA	25,700
CZECHIA	68,000
DENMARK	211,000
ESTONIA	10,000
FINLAND	57,000
FRANCE	5,800,000
GERMANY	3,700,000
GREECE	971,000
HUNGARY	415,000
IRELAND	97,000
ITALY	12,882,000
LATVIA	12,000
LITHUANIA	21,000
NETHERLANDS	1,800,000
NORWAY	195,000
POLAND	1,128,000
PORTUGAL	699,000
ROMANIA	296,000
RUSSIAN FEDERATION	3,296,000
SLOVAKIA	31,000
SLOVENIA	40,500
SPAIN	5,002,000
SWEDEN	311,000
SWITZERLAND	300,000
TÜRKİYE	11,477,000
UKRAINE	778,000
UNITED KINGDOM	1,600,000
TOTAL EUROPE	51,740,200
TOTAL EU	34,094,200

Data sourced via FEDIAF's National Association members and aligned by Soulor Consulting.
For more information on our methodology, please read the Appendix.



Facts & Figures: Number of European Aquaria



Data sourced via FEDIAF's National Association members and aligned by Soulor Consulting.
For more information on our methodology, please read the Appendix.

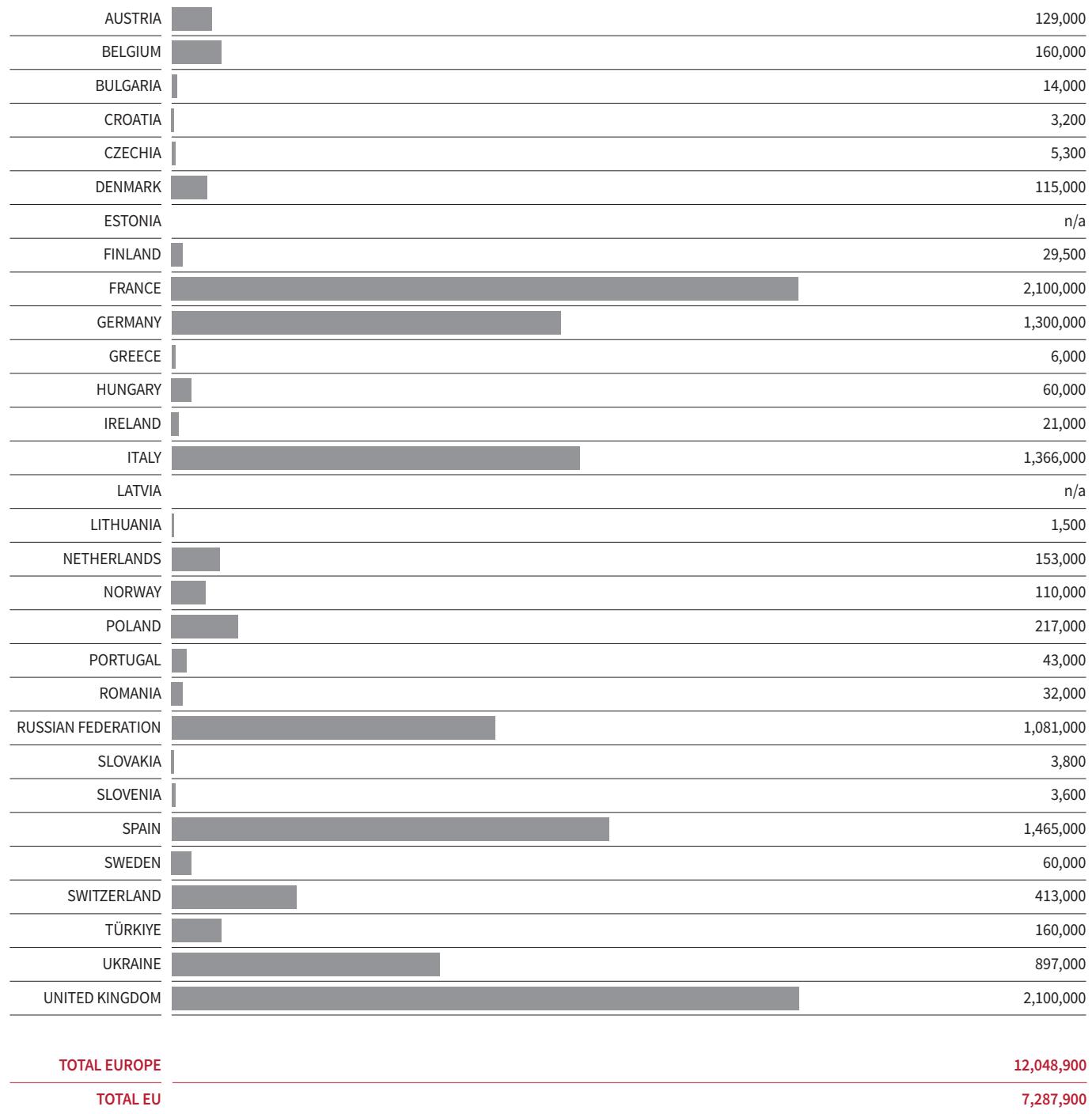
Facts & Figures: European Small Mammal Population



AUSTRIA	508,000
BELGIUM	1,026,000
BULGARIA	60,100
CROATIA	37,000
CZECHIA	187,000
DENMARK	389,000
ESTONIA	27,000
FINLAND	160,000
FRANCE	2,870,000
GERMANY	4,900,000
GREECE	416,000
HUNGARY	398,000
IRELAND	170,000
ITALY	1,816,000
LATVIA	33,000
LITHUANIA	56,000
NETHERLANDS	775,000
NORWAY	200,000
POLAND	1,252,000
PORTUGAL	238,000
ROMANIA	94,000
RUSSIAN FEDERATION	6,633,000
SLOVAKIA	45,000
SLOVENIA	86,000
SPAIN	1,524,000
SWEDEN	498,000
SWITZERLAND	493,000
TÜRKİYE	821,000
UKRAINE	893,000
UNITED KINGDOM	3,300,000
TOTAL EUROPE	29,905,100
TOTAL EU	17,565,100

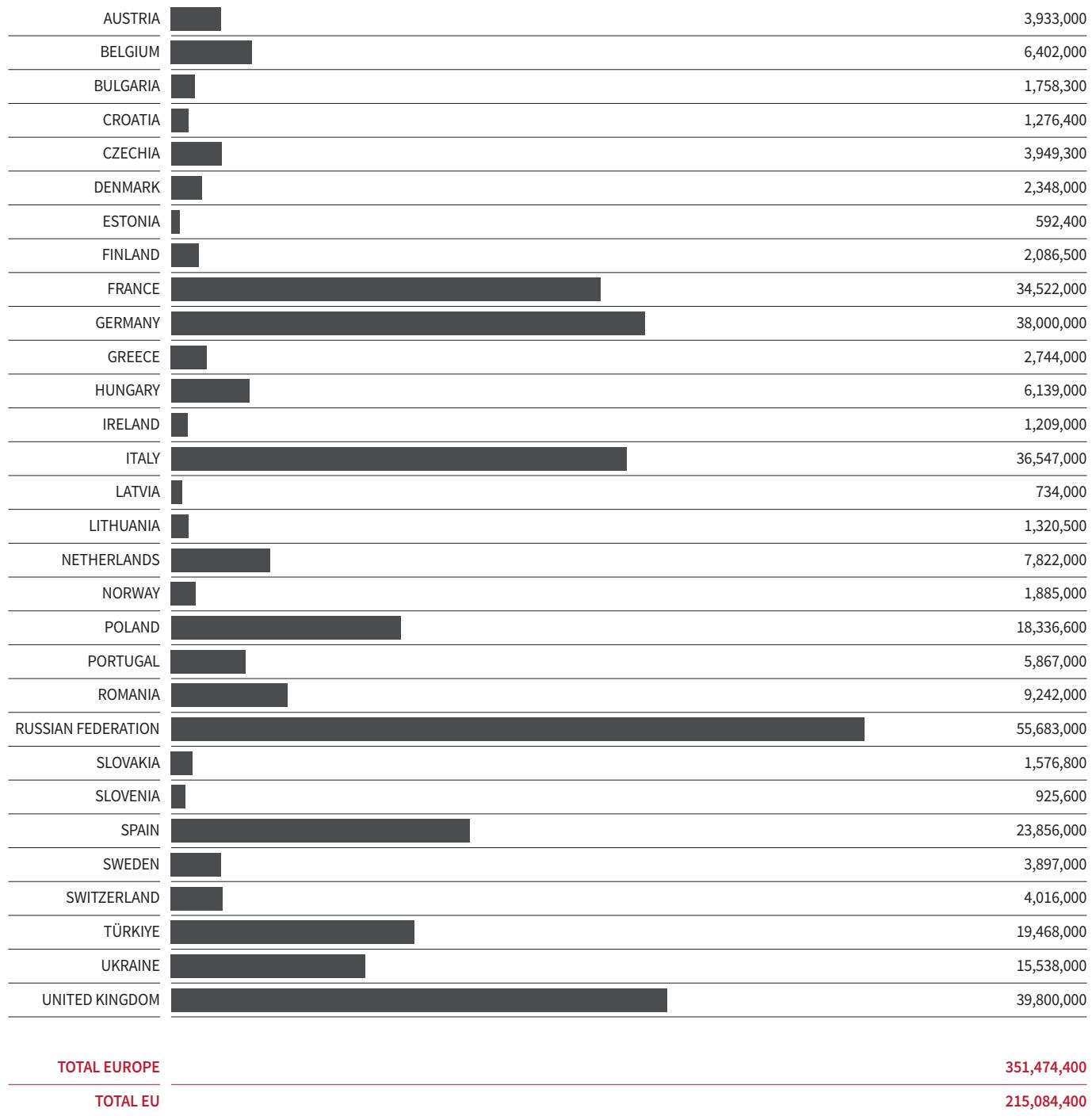
Data sourced via FEDIAF's National Association members and aligned by Soulor Consulting.
For more information on our methodology, please read the Appendix.

Facts & Figures: European Terraria



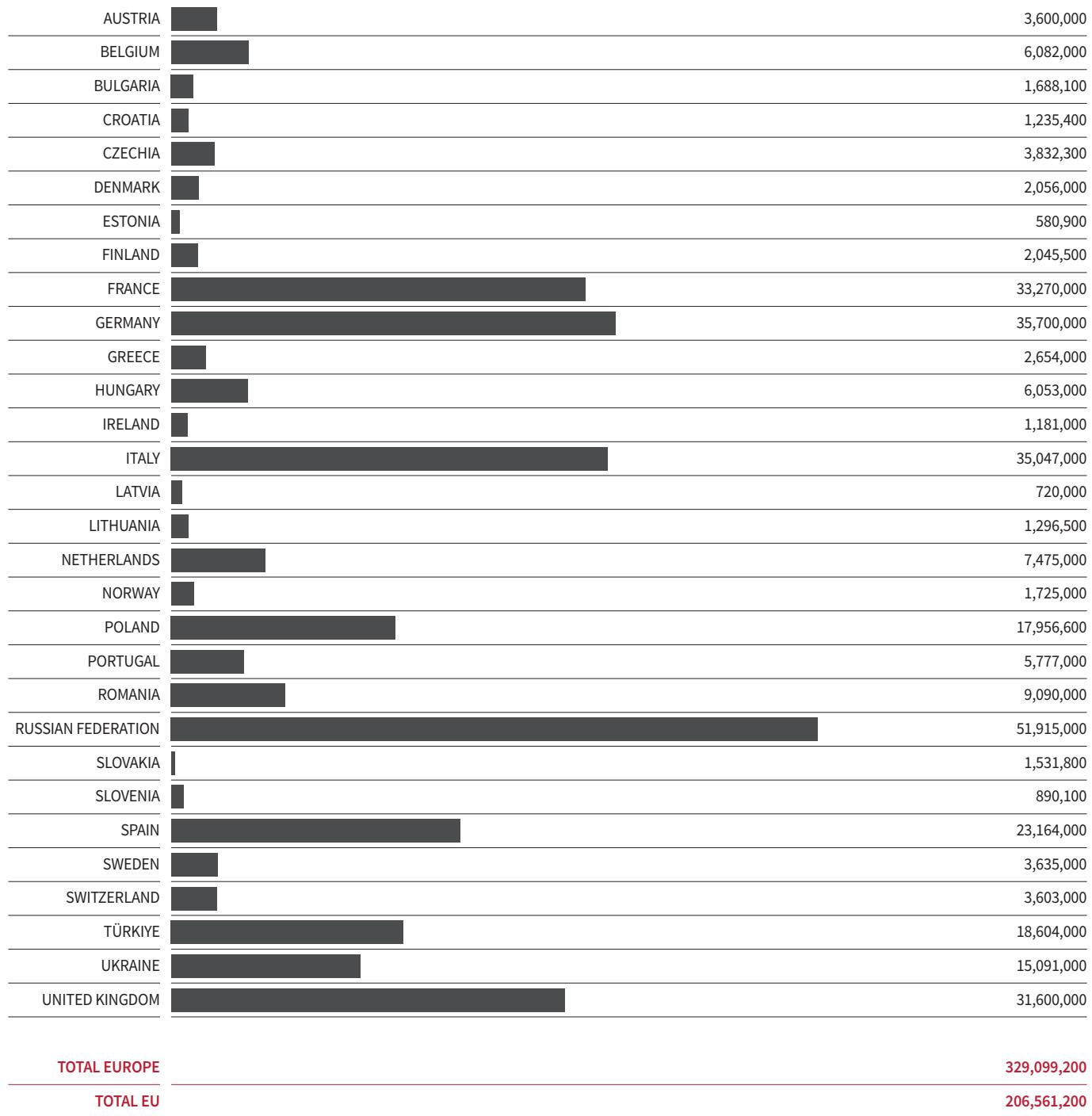
Data sourced via FEDIAF's National Association members and aligned by Soulor Consulting.
For more information on our methodology, please read the Appendix.

Facts & Figures: European Population Total



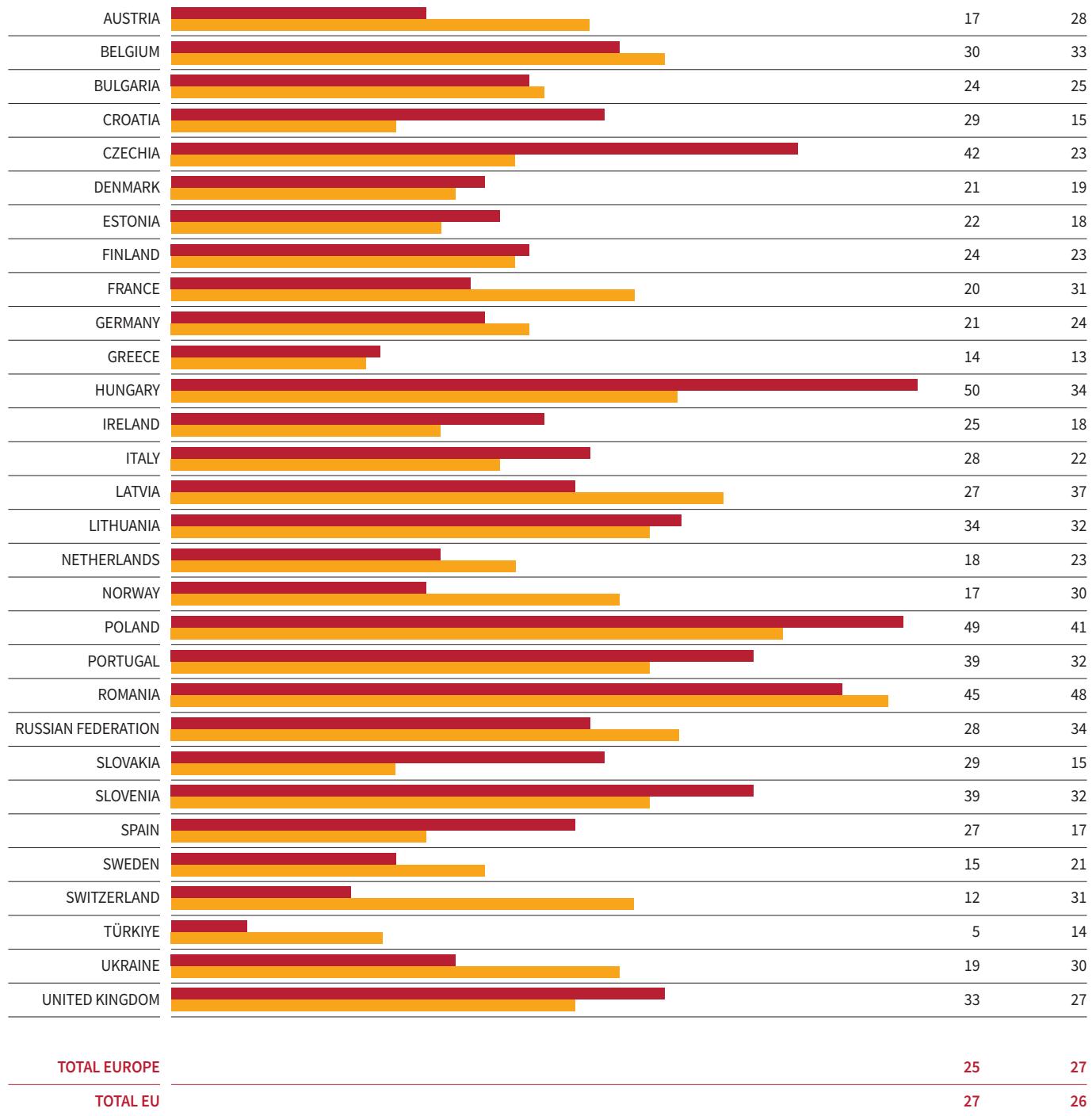
Data sourced via FEDIAF's National Association members and aligned by Soulor Consulting.
For more information on our methodology, please read the Appendix.

Facts & Figures: European Population Total Excluding Aquaria



Data sourced via FEDIAF's National Association members and aligned by Soulor Consulting.
For more information on our methodology, please read the Appendix.

Facts & Figures: % of European Households Owning at Least One Dog or One Cat



Data sourced via FEDIAF's National Association members and aligned by Soulor Consulting.
For more information on our methodology, please read the Appendix.

Appendix

PET POPULATION DATA METHODOLOGY

This year FEDIAF's member national associations provided data for 2022.

The decision to publish figures from two years previously was made in order to harmonize data. Previously, some markets have been unable to provide the most recent year of data in time for publication.

For countries where member associations provided 2022 data, this data was checked against 2021 to ensure consistency. In some cases this year's data is the same as the data published last year. Where we do not have a member association, or if European countries were unable to supply data, Soulour Consulting made estimates based on data published by FEDIAF for 2021 using a new methodology by looking at household growth 2021 - 2022.

Most of our national associations provide FEDIAF with aquaria as they now understand that we collect aquaria not fish. As a result, FEDIAF has not had to 'translate' fish numbers into aquaria. Where markets have not provided any data, Soulour has based figures on what was published in 2021 and the number has been aligned according to the average number of pets per household.

Please note that this year an additional country has been added: Croatia.

The Total Europe & EU total households owning a pet percentages are calculated from those National Associations that submitted a number for households owning a pet (total) which were FR, DE, NL, ES & GB. Those countries account for 40% of the total pet population (Total Europe, 64% for EU). Those calculated percentages of households owning for those five countries was applied to the number of total households for Total Europe and EU.

All final population data was rounded.

Due to the change in methodology, comparisons between the data published in this report, should not be compared to previous years.

MARKET DATA METHODOLOGY

As with Population data, this year national associations were asked to provide data for 2022.

Where a national association was not able to provide volume or value sales for the market, this missing data was calculated based on expected price per kilo. Where a country did not submit, the total for total pet was estimated using a new methodology.

As there has been a change in methodology this year which means that no data was available for previous years, the Total Europe value growth figure is the percentage change in consumer price inflation 2021-2022 from European Commission CPI indices (for the EU27) while volume is quoted as a maximum change based on the change in the pet population between 2021 and 2022.

PARTICIPATING MARKETS

Population & Market Data from NA data: AT, BE, CZ, FR, DE, HU, IT, NL, NO, PL, SK, ES, CH, UK (some data points were changed by Soulour Consulting during checking process).

Population & Market Data from FEDIAF/Soulour Consulting Estimates: BG, HR, DK, EE, FI, GR, IE, LV, LT, PT, RO, RU, SI, SE, TR, UA.

2022 Total Population and Total Europe Market Data include all of the listed 30 countries (TotalEU = 24 countries, CY, LU & MT excluded due to small size; IS, LI excluded from EEA due to small size).

Glossary

AGM	Annual General Meeting	FEFANA	European Union trade association of the animal feed additives industry
AMFEP	Associations of Manufacturers and Formulators of Enzyme Products	FSFS	Framework for Sustainable Food Systems
APAG	The European Oleochemical Industry	FVE	Federation of Veterinarians in Europe
AWTF	FEDIAF Animal Welfare Task Force	GAPFA	Global Alliance of Pet Food Associations
BHA	Butylated Hydroxy Anisole	GHG	Greenhouse Gas Emissions
CECIC	The European Chemical Industry Council	IIA	Inception Impact Assessment
DG AGRI	European Commission Directorate-General for Agriculture and Rural Development	JRC	Joint Research Council
DG ENVI	European Commission Directorate-General for the Environment	LCA	Life Cycle Analysis
DG GROW	European Commission Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs	NGOs	Non-Governmental Organisations
DG IMCO	Committee on the Internal Market and Consumer Protection	NWG	Nutrition Working Group
DG SANTE	European Commission Directorate-General for Health and Food Safety	PARNUTS	Food intended for Particular Nutritional Purposes
DG TRADE	European Commission Directorate-General for Trade	PEF	Product Environmental Footprint
EC	European Commission	PEFCRs	Product Environmental Footprint Category Rules
EF	Environmental Footprint	PPWR	Packaging and Packaging Waste Regulation
EFSA	European Food Safety Authority	RASFF	Rapid Alert System for Food and Feed
ESVCN	European Society of Veterinary & Comparative Nutrition	RED	The EU Renewable Energy Directive
ESWG	Environmental Sustainability Working Group	RES	Renewable Energy Sources
EU	European Union	SAB	Scientific Advisory Board
FECAVA	Federation of European Companion Animal Veterinary Associations	SCoPAFF	Standing Committee on Plants, Animals, Food and Feed
FEDIAF	European Pet Food Industry Federation	SPS	Sanitary and Phytosanitary Measures
FEFAC	The European Feed Manufacturers' Federation	TASAG	FEDIAF Trade Associations Secretaries Action Group
		TSE	Transmissible spongiform encephalopathies
		UK	United Kingdom
		WG	Working Group

FEDIAF Annual Congress 2024 Sponsors

This year, we would like to thank and introduce our two Gold Sponsors:



FeedKind®Pet is a novel protein produced from fermentation of Non-GMO bacteria. As 'alternative protein from bacteria', FeedKind®Pet is the first product to be produced at full scale and brand new, unique fermentation facility operated by Calysta (in a joint venture with Adisseo).

FeedKind®Pet is fully approved for application in pet food within the EU (and many other countries) and since 2nd Quarter this year available within the EU. First introductions of new pet food products, containing FeedKind®Pet, were done at Interzoo in Nürnberg this year.



We are compelled to provide safe and delicious ingredients to improve our pets' food so they can have the best quality of life. Kemin® delivers specialized expertise, innovative products, and unrivaled support every step of the way for leading pet food companies, manufacturers, renderers, and ingredient suppliers.

From oxidation control and food safety to palatability and nutrition, Kemin® is Compelled by Curiosity™ to ensure pets around the world are living happy and healthy lives.



EuropeanPetFood

Rue de l'Industrie 11
box 10, B – 1000
Brussels

fediaf@fediaf.org

www.europeanpetfood.org