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Canada

MARKET ACCESS SECRETARIAT
Global Analysis Report

Pet Food
in the European Union

April 2016

EXECUTIVE SUMMARY

- In 2014, the European Union (EU) was the second-largest pet food market worldwide with US$21.5 billion worth of retail value sales.

- Of the top five international pet food companies in 2014 three sold products in the EU. These companies were the number one ranked Mars Inc., the number two ranked Nestlé SA. and the number three ranked Colgate-Palmolive Co.

- The top three non-EU suppliers of pet food products to the EU were the United States, Thailand and Switzerland in 2014. Combined, these three countries held over 60% of the total available market share. Canada was the fifth-ranked supplier of pet food to the EU with imports valued at US$71.4 million.

- In 2014, the top three retail markets for pet food in the EU were the United Kingdom with US$5.2 billion in value sales, France with US$3.6 billion and Germany with US$3.4 billion. These three countries combined accounted for over 56.7% of the total EU market share.

- Canada exported over US$680.0 million worth of pet food to the world in 2014 with only 10.9% being exported to the EU. Therefore resulting in a large supply gap between Canada and the EU.

- When the Canada-European Union Comprehensive Economic and Trade Agreement (CETA) enters into force, all EU tariffs on Canadian pet food, some as high as $1,341/tonne, will be eliminated to zero from day one.

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POSITIONING PET FOOD IN THE WORLD

Top 5 Pet Food Companies Worldwide in 2014, US$

Company	International Sales	Sales in the EU
1. Mars Inc.	$17.8 billion	$5.7 billion
2. Nestlé SA	$16.8 billion	$4.1 billion
3. Colgate-Palmolive Co	$3.7 billion	$0.7 billion
4. Big Heart Pet Brand	$2.9 billion	N/A
5. Blue Buffalo Co Ltd	$1.4 billion	N/A

Source: *Euromonitor International, 2015*

Top 10 Pet Food Markets Worldwide in 2014, US$

Country	Retail Sales
1. United States	$28.0 billion
2. European Union	**$21.5 billion**
3. Brazil	$4.2 billion
4. Japan	$3.4 billion
5. Australia	$2.2 billion
6. Mexico	$2.1 billion
7. Russia	$2.0 billion
8. Canada	$1.5 billion
9. Argentina	$1.2 billion
10. Venezuela	$1.1 billion

The Pet Food Market in the EU in 2014, US$

Indicator	Value
Retail sales	$21.5 billion
Imports of pet food from the world	$1.2 billion
Exports of pet food to the world	$4.1 billion
Dependence on imports	5.6%

Source: *Euromonitor International, 2015; Global Trade Atlas, 2015*

Top 10 Importers of Pet Food* Worldwide 2014, US$

Country	Imports US$ millions	Top Suppliers & Market Share			Canada's Share
		1	2	3	
United States	1,221.6	Canada 33.4%	China 19.0%	Thailand 16.7%	33.4%
European Union	**1,153.1**	**United States 33.1%**	**Thailand 15.5%**	**Switzerland 15.0%**	**6.2%**
Japan	1,093.4	Thailand 28.5%	United States 18.7%	China 13.5%	1.9%
Canada	900.4	United States 89.8%	China 2.8%	Thailand 1.7%	0.2%
Russia	807.9	France 15.6%	Netherlands 14.1%	Germany 11.0%	3.0%
Indonesia	555.7	United States 39.1%	Australia 14.8%	New Zealand 8.9%	6.6%
Chile	457.7	Argentina 59.4%	Brazil 10.4%	United States 10.2%	0.2%
Costa Rica	359.6	United States 90.4%	Mexico 4.4%	Peru 0.6%	0.1%
South Korea	357.2	China 27.8%	United States 22.5%	France 9.6%	2.9%
Australia	335.5	United States 33.4%	Thailand 20.1%	New Zealand 10.4%	0.9%

Source: *Global Trade Atlas, 2015*
****Note:*** *For the purposes of this report, "pet food" was defined using the following HS codes: 230910 and 230990*

In 2014, the European Union (EU) was the world's second-largest importer of pet food in the world, after the United States, with imports valued at US$1.2 billion. The top non-EU supplying countries of pet food were the United States with 33.1% market share, followed by Thailand (15.5%), and Switzerland (15.0%). Canada, with a market share of 6.2%, was the fifth-largest non-EU supplier of pet food with imports valued at US$71.4 million in 2014. After a slight decline in imports in 2010, EU imports of pet food from Canada have seen sustained growth since then and registered a compound annual growth rate (CAGR) of 8.5% from 2010-14 (Global Trade Atlas, 2015).

EU's Top Ten Suppliers of Pet Food* from Non-EU Countries, US$ Millions

Country		2010	2011	2012	2013	2014	CAGR % 2010-14
World		**867.84**	**1,023.17**	**874.65**	**1,041.78**	**1,153.11**	**7.36**
1	United States	267.06	413.85	242.89	336.87	381.80	9.35
2	Thailand	135.68	147.81	151.65	159.27	178.17	7.05
3	Switzerland	30.95	26.90	74.90	151.51	173.01	53.76
4	China	143.54	122.74	145.02	183.51	171.72	4.58
5	Canada	51.51	46.40	50.20	65.36	71.40	8.50
6	Brazil	14.68	25.45	18.40	19.88	28.23	17.76
7	Norway	11.09	25.09	34.10	22.42	24.80	22.30
8	Liechtenstein	146.59	155.27	94.74	24.19	19.53	-39.58
9	Serbia	3.55	7.30	7.30	16.05	16.70	47.22
10	Indonesia	1.67	1.13	0.49	4.90	16.29	76.66

Source: *Global Trade Atlas, 2015*

****Note:*** *For the purposes of this report, "pet food" was defined using the following HS codes: 230910 and 230990*

Canada exported over US$680.0 million worth of pet food to the world in 2014, and a good portion went to the United States (61.3%), followed by the European Union (10.9%), and Russia (4.3%). As seen in the supply gap analysis below, EU imports of Canadian pet food are relatively small in comparison to their imports from the world. An important factor that will positively impact Canadian pet food exporters' competitiveness is the EU is the Canada-European Union Comprehensive Economic and Trade Agreement (CETA) which was concluded in August 2014. Once CETA enters into force, all EU tariffs on imports of Canadian pet food, some as high as $1,341/tonne, will become duty-free. For more information on CETA, please visit the following website: Canada-European Union Comprehensive Economic and Trade Agreement (CETA).

Pet Food* Supply Gap, 2014 (US$ Millions)

	2010	2011	2012	2013	2014	2010-14 CAGR* %
EU Imports of Pet Food* from the World	867.8	1,023.2	874.7	1,041.8	1,153.1	7.36
EU Imports of Pet Food* from Canada	51.5	46.4	50.2	65.4	71.4	8.51
Supply Gap	816.3	976.8	824.5	976.4	1,081.7	7.29

Source: *Global Trade Atlas, August 2015* ****CAGR:*** *Compound Annual Growth Rate.*

****Note:*** *For the purposes of this report, "pet food" was defined using the following HS codes: 230910 and 230990*

RETAIL ENVIRONMENT

The European Union (EU) pet food retail environment is the second-largest in the world, after the United States, with retail value sales of US$21.5 billion in 2014. The top five EU countries with the largest retail value sales were the United Kingdom (US$5.3 billion), France (US$3.7 billion), Germany (US$3.4 billion), Italy (US$2.5 billion), and Spain (US$1.2 billion). These five countries combined accounted for 74.9% of the overall EU market in 2014, indicating a very concentrated retail environment.

Overall, the EU's pet food industry has seen steady growth from 2010-14 with a compound annual growth rate (CAGR) of 3.2%. Euromonitor International is predicting that this growth with continue through 2019 when retail values will reach US$25.2 billion resulting in a CAGR of 3.4% over this period. In 2014, dog food, with value sales of just under US$10.0 billion, is the largest subcategory within pet food, followed closely by cat food with US$9.7 billion. By 2019, Euromonitor international is forecasting that cat food value sales will overtake dog food values sales by a slight margin both reaching slightly over US$11.5 billion, respectively. In addition, both dog food and cat food value sales are expected to each have a CAGR's of over 3.0%.

Historic Retail Value Sales of Pet Food in the EU, in US$ Millions and Period Growth (%), Current Prices – Fixed 2015 Exchange Rates

Categories	2010	2011	2012	2013	2014	2010-14 CAGR* %
Pet Food	18,936.4	19,572.7	20,257.9	20,842.4	21,452.7	3.17
Dog Food	8,786.4	9,070.4	9,370.9	9,646.8	9,927.8	3.10
Cat Food	8,504.7	8,821.1	9,158.8	9,440.2	9,730.8	3.42
Other Pet Food	1,645.8	1,681.5	1,727.9	1,755.9	1,794.6	2.19
Pet Products	5,730.7	5,857.7	6,018.0	6,164.8	6,346.8	2.59

***CAGR:** Compound Annual Growth Rate.

Forecast Retail Value Sales of Pet Food in the EU, in US$ Millions and Period Growth (%), Current Prices – Fixed 2015 Exchange Rates

Categories	2015	2016	2017	2018	2019	2015-19 CAGR* %
Pet Food	22,028.2	22,744.4	23,536.4	24,361.3	25,214.1	3.43
Dog Food	10,181.8	10,496.4	10,837.6	11,197.7	11,570.9	3.25
Cat Food	10,016.4	10,367.3	10,760.4	11,165.0	11,582.0	3.70
Other Pet Food	1,831.0	1,881.1	1,938.9	1,998.9	2,061.1	3.00
Pet Products	6,523.7	6,742.6	6,979.0	7,225.3	7,483.5	3.49

***Source for both:** Euromonitor International, 2015* ****CAGR:** Compound Annual Growth Rate.*

MARKET ANALYSIS – TOP THREE COUNTIRES

United Kingdom

As the largest consumer retail market for pet food in the European Union, the United Kingdom (UK) saw retail value sales of over US$5.1 billion in 2014, with over US$2.5 billion spent on dog food and just over US$2.0 billion on cat food. Both dog and cat food each saw a CAGR of over 4.5% from 2010-14 and are forecasted to have a CAGR of 2.8% and 3.6%, respectively, from 2015-19.

Historic Retail Value Sales of Pet Food in the UK, in US$ Millions and Period Growth (%), Current Prices – Fixed 2015 Exchange Rates

Categories	2010	2011	2012	2013	2014	2010-14 CAGR* %
Pet Food	4,245.1	4,521.6	4,808.5	5,001.7	5,195.7	5.18
Dog Food	2,115.7	2,226.9	2,354.9	2,447.4	2,540.7	4.68
Cat Food	1,731.3	1,849.0	1,953.2	2,016.6	2,077.4	4.66
Other Pet Food	398.2	445.7	500.4	537.6	577.6	9.74

***CAGR:** Compound Annual Growth Rate.

Forecast Retail Value Sales of Pet Food in the UK, in US$ Millions and Period Growth (%), Current Prices – Fixed 2015 Exchange Rates

Categories	2015	2016	2017	2018	2019	2015-19 CAGR* %
Pet Food	5,371.8	5,556.8	5,751.8	5,954.9	6,159.7	3.48
Dog Food	2,617.4	2,693.8	2,768.4	2,845.8	2,921.6	2.79
Cat Food	2,140.4	2,209.5	2,289.2	2,374.5	2,463.7	3.58
Other Pet Food	614.1	653.5	694.2	734.6	774.4	5.97

Source for both: *Euromonitor International, 2015* ****CAGR:*** *Compound Annual Growth Rate.*

The top pet food companies in the UK in 2014 were Mars Inc. (29.8% of the market share) with their brands of Pedigree and Whiskas, followed by Nestlé SA (23.1%) and their brands of Felix and Bakers, and Butcher's Pet Care Ltd (3.3%) and their brand of Butcher's (Euromonitor International, 2015).

Two trends impacting dog food sales in the UK in 2015 and beyond are 1) the shift towards single-dog households; and 2) as a result of busy lifestyles, pet ownership of small dogs is gaining in popularity because small dogs offer companionship with less fuss. In addition, with UK consumers looking more closely at their everyday diet as a result of the increasing health and wellness trend, dog owners are expected to pay more attentions to the ingredients contained in their dog food (Euromonitor International, 2015-A).

UK consumers who purchase cat food, like dog food consumers, are scrutinizing the ingredients used in the food that they are buying because of the growing concern over meat levels (not enough actual meat contained in the product) and quality. Also, the cat population in the UK is increasing as consumers view cats as easier and cheaper to care for than dogs and they are better suited for a busy lifestyle (Euromonitor International, 2015-B).

Pet food distribution in the UK is primarily done through modern grocery retailers in particular hypermarkets and supermarkets. Supermarkets accounted for 29.6% of store-based retailing pet food sales, followed closely by hypermarkets with 28.9%. Non-grocery specialists such as pet superstore and pet shops combined accounted for 20.1% of pet food sales in 2014 (Euromonitor International, 2015).

France

As the second-largest consumer retail market for pet food in the European Union, France had pet food retail value sales of over US$3.5 billion in 2014, with over US$1.7 billion spent on cat food and just over US$1.4 billion on dog food. Cat food, the largest subcategory within France's pet food sector, had the highest compound annual growth rate (CAGR) of all subcategories from 2010-14 with a CAGR of 5.3%. From 2015-19, cat food is forecasted to reach value sales of over U$2.2 billion with a CAGR of 3.4% and will still remain the leading subcategory for the pet food industry in France (Euromonitor International, 2015).

Historic Retail Value Sales of Pet Food in France, in US$ Millions and Period Growth (%), Current Prices – Fixed 2015 Exchange Rates

Categories	2010	2011	2012	2013	2014	2010-14 CAGR* %
Pet Food	3,085.3	3,177.3	3,299.4	3,434.4	3,558.1	3.63
Cat Food	1,451.5	1,517.4	1,597.5	1,694.1	1,784.0	5.29
Dog Food	1,281.7	1,310.1	1,350.2	1,389.5	1,425.8	2.70
Other Pet Food	352.1	349.9	351.7	350.8	348.3	-0.27

*__CAGR:__ Compound Annual Growth Rate.

Forecast Retail Value Sales of Pet Food in France, in US$ Millions and Period Growth (%), Current Prices – Fixed 2015 Exchange Rates

Categories	2015	2016	2017	2018	2019	2015-19 CAGR* %
Pet Food	3,671.0	3,793.8	3,931.7	4,072.8	4,217.8	3.53
Cat Food	1,865.9	1,951.5	2,043.7	2,135.5	2,228.8	3.43
Dog Food	1,459.0	1,497.3	1,541.6	1,588.4	1,636.4	2.91
Other Pet Food	346.1	345.1	346.5	348.9	352.6	0.47

Source for both: *Euromonitor International, 2015* ****CAGR:*** *Compound Annual Growth Rate.*

The top pet food companies in France in 2014 were Mars Inc. (25.6% of the total market share) with their brands of Pedigree and Whiskas, followed closely by Nestlé SA (24.4%) and their brands of Purina Friskies and Purina ONE, and Agrolimen SA (5.4%) and their brands of Affinity Brekkies and Affinity Ultima (Euromonitor International, 2015).

A developing trend in France, when it comes to feeding cats, is the process of mixed feeding which is feeding cats both wet and dry food to help prevent health problems. Another continuing trend affecting cat food sales in France is the premiumisation of pet food which is helping to pull up growth for both wet and dry cat food. As in the United Kingdom (UK), France consumers are also putting increased focus on the ingredients being used in pet food products (Euromonitor International, 2015-C).

France, like the UK, is experiencing a shift towards smaller dogs because they fit into a busier lifestyle, require less fussing, consume less food than their larger counter parts. In addition, the urbanization of the French population is also affecting the dog food industry. French consumers tend to feed their dogs either wet or dry food only instead of a mixed meal like other European consumers (Euromonitor International, 2015-D).

Pet food distribution in France is also primarily done through modern grocery retailers in particular hypermarkets and supermarkets. Hypermarkets accounted for 31.1% of store-based retailing pet food sales, followed supermarkets with 24.5%. Non-grocery specialists such as home and garden specialist retailers, pet superstore and pet shops combined accounted for 23.4% of pet food sales in 2014 (Euromonitor International, 2015).

Germany

As the third-largest consumer retail market for pet food in the European Union, Germany had retail value sales of just over US$3.4 billion in 2014, with over US$1.7 billion spent on cat food and just over US$1.4 billion on dog food. Like in France, Germany's cat food subcategory was the largest of all the pet food sectors, but only had a compound annual growth rate (CAGR) of 1.2% from 2010-14. From 2015-19, cat food is forecasted to reach value sales of over U$1.9 billion with a CAGR of 2.5% and will still remain the leading subcategory for the pet food industry in Germany (Euromonitor International, 2015).

Historic Retail Value Sales of Pet Food in Germany, in US$ Millions and Period Growth (%), Current Prices – Fixed 2015 Exchange Rates

Categories	2010	2011	2012	2013	2014	2010-14 CAGR* %
Pet Food	3,222.90	3,244.30	3,324.50	3,360.40	3,410.50	1.42
Cat Food	1,644.20	1,658.70	1,715.50	1,714.90	1,720.90	1.15
Dog Food	1,289.30	1,305.10	1,338.30	1,371.10	1,409.00	2.24
Other Pet Food	289.40	280.50	270.70	274.40	280.50	-0.78

***CAGR:** Compound Annual Growth Rate.

Forecast Retail Value Sales of Pet Food in Germany, in US$ Millions and Period Growth (%), Current Prices – Fixed 2015 Exchange Rates

Categories	2015	2016	2017	2018	2019	2015-19 CAGR* %
Pet Food	3,447.80	3,544.90	3,645.90	3,738.30	3,824.80	2.63
Cat Food	1,729.70	1,771.50	1,821.00	1,866.30	1,909.00	2.50
Dog Food	1,433.10	1,480.60	1,523.90	1,563.20	1,599.40	2.78
Other Pet Food	285.10	292.90	301.00	308.80	316.30	2.63

Source for both: *Euromonitor International, 2015* ****CAGR:*** *Compound Annual Growth Rate.*

The top pet food companies in Germany in 2014 were Mars Inc. (30.0% of the total market share) with their brands of Pedigree and Whiskas, followed by Nestlé SA (10.8%) and their brands of Purina Beneful and Purina Fancy Feast/Gourmet, and Vitakraft-Werke Wührmann & Sohn GmbH & Co KG (5.0%) and their brand of Vitakraft (Euromonitor International, 2015).

As cats are seen as beloved companions and family members in Germany, German consumers are becoming increasingly more concerned with their cat's wellbeing and health. This is raising the need for specialized products that focus on diverse health issues, breeds and life stages. A popular trend happening in Germany is the switch from large packs of dry cat food to the more convenient single-serve/pre-portioned wet cat food pouches (Euromonitor International, 2015-E).

German dog owners, like cat owners, are putting more emphasis on the quality and functionality of pet food products to help increase the wellbeing, health and vitality of their pets. This has resulted in the increasing popularity of natural, organic, and sustainable dog foods along with a rise in the popularity of wet food alternatives (Euromonitor International, 2015-F).

Pet food distribution in Germany is also primarily done through modern grocery retailers in particular supermarkets and hypermarkets. Supermarkets accounted for 25.0% of store-based retailing pet food sales, followed by hypermarkets with 19.1%. Non-grocery specialists such as pet superstores and pet shops combined accounted for 30.3% of pet food sales in 2014 (Euromonitor International, 2015).

NEW PRODUCTS ANALYSIS

According to the Mintel Global New Products Database, there were 9,078 new pet food product launches in the European Union market between January 2011 and August 2015. Germany, the United Kingdom and Spain were the most popular countries for products to be launched in over the January 2011 to August 2015 period and saw 52.0% of the total launches. Over half (59.1%) of the launches were completely new products and 27.1% were new varieties or range extensions. The most commonly used claim was "pet – adult" which appeared on 36.7% of the total launches, followed by "no additives or preservatives" with 32.7%, and "low/no/reduced allergen" with 16.4%. Approximately 27% of the total launches were in the dog snacks and treats product subcategory and 21% were in the cat food wet. Over 60% of the product launches fell within the US$0.25-US$3.54 price range.

Number of New Pet Food Product Launches in the EU*, by Year and Feature

Feature**	2011	2012	2013	2014**	August 2015
Total launches	**1,291**	**1,843**	**1,253**	**3,296**	**1,395**
Top 5 countries					
Germany	435	680	416	683	214
United Kingdom	225	255	184	508	291
Spain	149	154	114	271	150
Italy	52	202	96	244	95
Poland	31	45	28	220	118
Top 3 launch types					
New product	728	1,061	705	2,176	692
New variety/range extension	377	520	365	716	481
New packaging	133	165	119	289	138
Top 5 claims					
Pet - adult	331	539	503	1,207	751
No additives/preservatives	343	503	368	1,168	584
Low/no/reduced allergen	70	199	106	926	185
Premium	160	205	120	595	188
Low/no/reduced sugar	72	174	122	578	183
Top 5 subcategories					
Dog snacks and treats	343	479	312	955	444
Dog food dry	165	284	128	673	120
Cat snacks and treats	134	178	131	546	116
Cat food wet	335	434	311	509	374
Dog food wet	199	229	251	341	258
Top 5 companies					
Vitakraft	44	66	34	354	26
Interquell	4	11	3	192	8
Mars	157	193	134	186	143
Nestlé Purina PetCare	101	107	109	124	95
H. von Gimborn	15	29	5	95	3
Price range in US dollars					
$0.25 - $1.89	287	407	470	671	669
$1.90 - $3.54	212	210	200	385	349
$3.55 - $5.19	93	112	121	194	115

****Note:*** *EU includes all but the following countries Bulgaria, Cyprus, Estonia, Latvia, Lithuania, Luxembourg, Malta, and Slovenia because data is not collect from these countries.*
*****Note:*** *The features analyzed above were ranked based on 2014 data.*

NEW PRODUCT EXAMPLES, 2015

Chewing Mix for Adult Dogs

Company: Mars
Brand: Pedigree Pal
Subcategory: Dog snacks and treats
Launch type: New product
Price in US$: 1.20
Claims: No additives/preservatives, teeth and tartar prevention (functional pet), pet - adult
Description:

Pedigree Pal Kaumix (Chewing Mix for Adult Dogs) is said to be the right snack for the dental care of dogs. It reduces the formation of tartar by strengthening the teeth and gums. It is free from colouring and contains cow skin that is rich in calcium. The product retails in a 35g pack containing four pieces.

Cat Food with Meat and Dry Topping

Company: Nestlé Purina PetCare
Brand: Purina Felix Sensations Crunchy Crumbles
Subcategory: Cat Food Wet
Launch type: New product
Price in US$: 6.02
Claims: Convenient packaging, pet – adult

Description: Purina Felix Sensations Crunchy Crumbles Mahlzeiten mit Fleisch und Knusperstückchen (Cat Food with Meat and Dry Topping) covers 100% of adult cat's daily need of vitamin D, vitamin E, minerals and omega 6. The product retails in a 1040g pack which contains ten 100g sachets of wet cat food with meat in jelly in these flavours: 3x beef; 3x chicken; 2x rabbit; and 2x lamb; and one resealable 40g sachet with crunchy crumbles topping.

Braised Beef and Delectable Duck with Green Beans Dog Foods

Company: Butcher's Pet Care
Brand: Butcher's Choice Superior
Subcategory: Dog Food Wet
Launch type: New Variety/Range Extension
Price in US$: 0.80
Claims: Premium, pet - adult

Description: Butcher's Choice Superior Braised Beef & Delectable Duck with Green Beans Dog Food is made with minimum 99% natural ingredients and is said to be fresh every time. This premium meaty recipe is suitable for adult dogs, and retails in a150g pack.

Source for all: *Mintel, 2015*

STANDARDS

FEDIAF, the European Pet Food Industry Federation, was established in 1970 and represents the pet food industry in 26 European countries. FEDIAF function is to collaborate with authorities, regulators and academics to achieve positive conditions for the supply of safe, nutritious and palatable pet products (FEDIAF, 2015-A). FEDIAF has developed guidelines and a code for nutrition and labelling of pet food.

Nutrition
FEDIAF developed "Nutritional Guidelines" for basic nutrient levels in cat and dog food and other animals. To review the complete guide, visit the FEDIAF website: http://www.fediaf.org/self-regulation/nutrition/

Labelling
Pet food labelling in the European Union (EU) is primarily governed by EU regulation 767/2009. For more information on the specific labelling requirements in the EU, please visit the following website: EU Regulation - 767/2009

FEDIAF, based on interpretation of EU regulation 767/2009, established a "Code of Good Labelling Practices for Pet Food," which addresses three basic functions: 1) consumer information on product use; 2) control and enforcement; and 3) marketing and retailing. The following information is legally required on pet food labels (FEDIAF, 2015-B):

- Name and product description
- Ingredients list
- Information about nutrient levels
- Information about additives
- Best Before Date, Batch Code
- The name of the producer or the distributor and how to contact them for further information
- How to use the product (feeding instructions)
- Weight and/or quantity statement

To review the complete code, visit the FEDIAF website: http://www.fediaf.org/self-regulation/labelling/

In addition, EU labelling requirements will change for each type of pet food (compound, single ingredient, dietetic feed); additivities in pet food are regulated; and genetically modified (GM) ingredients contained in pet food must come from an approved GM crop and must be labelled. Also, to learn more on export requirements for meat by-products to the EU, exporter's should consult Chapter 11 of the Canadian Food Inspection Agency's (CFIA)'s Meat Hygiene Manual of Procedures.

FOR MORE INFORMATION

International Trade Commissioners can provide Canadian industry with on-the-ground expertise regarding market potential, current conditions and local business contacts, and are an excellent point of contact for export advice.

- **Overview of Trade Commissioner Services in Brussels**
  http://www.tradecommissioner.gc.ca/eng/office.jsp?oid=140&cid=111

- **Find a Trade Commissioner**
  www.tradecommissioner.gc.ca/eng/find-trade-contacts.jsp

For additional intelligence on this and other markets, the complete library of Global Analysis reports can be found under *Statistics and Market Information* at the following link, arranged by sector and region of interest:

- ats-sea.agr.gc.ca

RESOURCES

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Pet Food in the European Union
Global Analysis Report

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