

Top petfood companies

Our annual list of the largest petfood manufacturers worldwide expands this year with 15 companies



Figure 1: Top 15 petfood companies according to 2010 sales totals.

Our annual list of the top petfood players expands this year as we profile 15 petfood manufacturing global giants.

The following is a guide to the business basics of the highest grossing petfood manufacturers internationally, based on 2010 data provided by Euromonitor International. Please refer to Figure 1 for a quick reference to the top 15 global manufacturers profiled and below for more in-depth information on the top 10.

1. **Mars Inc.**

World headquarters: Brussels, Belgium (Mars Petcare US: Franklin, Tennessee, USA)

Approximate 2010 global retail sales: US\$14.7 billion

Officers: Pierre Laubies, global president of Mars Petcare; Luc Mongeau, president of Mars Petcare US

Bite-sized facts: Mars Petcare employs over 33,000 associates in 63 manufacturing sites around the globe

Top brands: Cesar, Greenies, Nutro, Pedigree, Royal Canin, Sheba, Whiskas, KiteKat, Chappi, Catsan

Websites: www.mars.com

Vital stats: Mars Inc. ranked 19th on the 2011 list of the "World's Best Multinational Workplaces," compiled by the Great Place to Work Institute. According to Mars, the reasons for its selection included the development and introduction of an employee participation program, the appointment of an ombudsman at local sites and a larger percentage (27%) of women in senior management positions. In March 2010, Mars Petcare announced a commitment to using only sustainably sourced fish by 2020. At the beginning of 2011, the company introduced Marine Stewardship Council-certified fish varieties for its Whiskas brand in Europe.

In addition, The Pedigree Adoption Drive helps rescue thousands of dogs from shelters every year.

2. **Nestlé SA**

World headquarters: Vevey, Switzerland (Nestlé Purina PetCare: St. Louis, Missouri, USA)

Approximate 2010 global retail sales: US\$14.1 billion

Officers: W. Patrick McGinnis, CEO of Nestlé Purina PetCare; William Danforth, founder; James Elsesser, CFO; Terence Block president of Nestlé Purina Pet Food North America and CFO of North American Pet Foods

Bite-sized facts: Nestlé Purina PetCare employs 14,500 people worldwide in 24 manufacturing plants and 13 sales offices.

Top brands: Kit & Kaboodle, Cat Chow, Kitten Chow, Dog Chow, Puppy Chow, Deli-Cat, Frosty Paws, Purina One, Purina Veterinary Diets, Pro Plan, Chef Michael's, Fancy Feast, Whisker Lickin's, TBonz, Busy, Beggin', Mighty Dog, Alpo, Moist & Meaty, Fit & Trim, Beneful, Friskies

Websites: www.nestle.com; www.purina.com

Vital stats: Nestlé, parent company of Nestlé Purina PetCare, ranks among the top 11 companies worldwide for corporate sustainability practices according to Two Tomorrows, an international corporate sustainability agency, in its recently released Tomorrow's Value Rating. The company also relied on clever marketing campaigns in 2011, including an ad featuring a YouTube 'talking dog' and commercials aimed at getting the attention of both people and dogs. In late 2011, Nestlé Purina PetCare announced a US\$48 million investment in a Vorsino, Russia wet petfood production facility.

3. **Colgate-Palmolive Co.**

World headquarters: New York, New York, USA (Hill's Pet Nutrition: Topeka, Kansas, USA)

Approximate 2010 global retail sales: US\$3.4 billion

Officers: Neil Thompson, Hill's Pet Nutrition president and CEO; Kostas Kontopoulos, president Hill's Pet Nutrition US; Francisco Munoz Ramirez, VP & general manager Hill's Pet Nutrition Europe
 Bite-sized facts: Hill's brands are available in more than 90 countries. The company employs about 3,000 people at facilities in Kansas, Indiana and Kentucky, USA, The Netherlands and Czech Republic.

Top brands: Hill's Science Diet, Hill's Prescription Diet, Hill's Science Plan

Websites: www.colgate.com; www.hillspet.com

Vital stats: "We want to sell our brands where we know consumers are receiving education on why our formulas are made the way they are," explained Neil Thompson, president and CEO of Hill's, in a recent *Petfood Industry* cover profile. Aiding in Hill's nutrition pursuits are the company's extensive research and efforts in the fields of palatability and nutrigenomics. At the Hill's Pet Nutrition Center in Topeka, Kansas, USA resident dogs and cats assist researchers in palatability tests using solvent-assisted flavor evaporation, dynamic head space and GC-mass, spectrometry and olfactometry techniques. In the field of nutrigenomics, gene expression "heat" maps are used to measure and regulate expressions to derive statistical analysis of diseases and the effect nutrition and diet has upon them.

4. **Procter & Gamble Co.**

World headquarters: Cincinnati, Ohio, USA (P&G Pet Care: Dayton, Ohio, USA)

Approximate 2010 global retail sales: US\$3.3 billion

Officers: Robert McDonald, CEO; Dan Rajczak, senior vice president of pet care; Dimitri Panayatopoulos, vice chairman

Bite-sized facts: P&G helps spread their mission of improving pet's lives with the help of Euka, a Golden Labernese and VP of Canine Communications. Euka attends stakeholder meetings and special events, and has appeared in *Fortune* magazine and even acted as Grand Marshall in local parades.

Top brands: Eukanuba, Iams

Websites: www.pg.com; www.eukanuba.com; www.iams.com

Vital stats: Despite continuing rumors that P&G will soon be selling off its petfood division, the company expanded the Iams Naturals line in 2011 and encouraged an environment of open innovation from all of its employees. In September 2011, the Pet Food Institute elected new officers, including Dan Rajczak, senior vice president of petcare at P&G, as its chairman.

5. **Del Monte Foods Co.**

World headquarters: San Francisco, California, USA

Approximate 2010 global retail sales: US\$2 billion

Officers: David West, CEO and director; Nils Lommerin, executive vice president and COO; Larry E. Bodner, executive vice president, CFO and treasurer

Bite-sized facts: Del Monte employs 5,200 people. Del Monte Foods reported net sales of US\$776.2 for the three months for fiscal 2012 ended July 31, a 3.5% decrease from US\$804.6 million in the first quarter fiscal 2011.

Top brands: Meow Mix, Kibbles n' Bits, Milk-Bone, Snausages, Nature's Recipe (Cat and Dog), Wholesome Goodness, 9Lives, Daily Essentials, Wholesome Medley, Pup-Peroni, Farmstand Select

Websites: www.delmonte.com

Vital stats: A Delaware, USA, judge accepted settlement in late December 2011 involving Del Monte Foods' shareholders over a lawsuit that arose from the sale of the company's petfood business division in 2010 to Barclays Capital. The deal finalizes the US\$89.4 million settlement arranged by the Delaware court that claims the two parties did not act properly in the sale of the petfood business to private-equity investors, led by KKR.

6. **Agrolimen SA** (Affinity Petcare SA)

World headquarters: Sant Cugat del Vallés, Barcelona, Spain (main plants/facilities: El Monjos, Spain and La Chapelle Vendomôise, France)

Approximate 2010 global retail sales: US\$0.72 billion

Officers: Carlos Argente, CEO; Lluís Carulla Font, founder; Artur Carulla Font, managing director; Jaime Tomas Sabate, managing director

Bite-sized facts: Affinity Petcare continues to conquer the European petfood market. The company has acquired a number of leading European brands, including Advance, Brekkies, Royal Chien, Premium, Play Dog and Play Cat, Repas Complet and Repas Equilibré. Affinity has an 11% market share of the dry petfood sector in the EU, available for sale and distribution in over 20 countries.

Top brands: Ultima, Brekkies, Brekkies Excel Cat, Advance, Advance Veterinary Diets

Websites: www.affinity-petcare.com

Vital stats: Affinity is the leading company in dog and cat nutrition in Spain, and the third in the European ranking for dry food. The company employs 650 professionals and has offices in Rungis, France and Milan, Italy and a research and palatability center in Barcelona, Spain.

7. **Uni-Charm Corp.**

World headquarters: Tokyo, Japan (petfood division headquartered in Shikokucho-City, Ehime, Japan)

Approximate 2010 global retail sales: US\$0.47 billion

Officers: Toshio Takahara, chairman; Keiichiro Takahara, director and founder; Gumpei Futagami, president/CEO

Bite-sized facts: Uni-Charm employs over 7,300 people, 1,221 of whom work exclusively for their petfood and pet care division

Top brands: Aiken Genki, Neko Genki, Gaines, Gin no Spoon, Gin no Sara

Websites: www.unicharm.co.jp/index.html; www.uc-petcare.co.jp

Vital stats: The largest pet care market in the Asian petfood market is found in Japan, according to Euromonitor data, where petfood, grooming and veterinary care were estimated to be worth US\$18 billion in 2009. Uni-Charm has positioned itself to be the leader in this emerging market.

8. **Nutriara Alimentos Ltda.** (Brazilian Pet Foods)

World headquarters: Araçatuba, Parana State, Brazil

Approximate 2010 global retail sales: US\$0.43 billion

Officers: Marcos Calsacara, president Brazilian Pet Foods; Marcelino Bortolo, technical and product development

Bite-sized facts: This Brazilian manufacturer diverged into two companies, Brazilian Pet Foods and Nutriara, in January 2010. Nutriara is the holding company in the agreement and the company name will be used for several years until Brazilian Pet Foods is well established.

Top brands: Br4Dogs and Cats, Dog Show, Show Dog, Floop, Disney Pets, Foster, Freddy's, Pitty, BYBOS, Blog Dog, Ringo, Farejador, Tommy, Full Dog, Gatto, Pitoko Mix, Pitukao, Pitukinha, Bidu, Wily, Foxy

Websites: www.brazilianpetfoods.com.br

Vital stats: Brazilian Pet Foods offers an electronic catalog of their entire dog and cat product lines in a downloadable app for the iPad on their website. They also have Twitter and Facebook pages for their over two dozen different brands.

9. **Total Alimentos SA**

World headquarters: Três Corações, Brazil

Approximate 2010 global retail sales: US\$0.40 billion

Officers: Antônio Teixeira Miranda Neto, president; Paulo Tavares, financial director; Anderson Duarte, technical director

Bite-sized facts: Total Alimentos prides itself on being a leader in the green manufacturing movement. Since 2010, the company has been working closely with ANFAL-PET, the petfood trade association in Brazil, to develop and implement a sustainability program that will be part of a certification program.

Top brands: Família Max, Big Boss, Lider, K&S, Equilíbrio, Naturalis, Natural treats

Websites: www.totalalimentos.com.br

Vital stats: Between 2004 and 2009, according to Euromonitor, value sales of economy dry dog food more than doubled in Latin American markets, to over US\$1.1 billion (significantly outperforming mid-priced and premium products). Total Alimentos is at the forefront of this emerging petfood segment and will only continue to grow with it.

10. **Mogiana Alimentos SA**

World headquarters: Campinas, Brazil

Approximate 2010 global retail sales: US\$0.30 billion

Officers: Robson Fonseca, export manager; Renata Amado, export assistant

Bite-sized facts: Founded in 1974, this is the first year this Brazilian petfood manufacturer has made our top 10 list—just another testament to the growth of petfoods in Latin American markets.

Top brands: Gubai Natural for dogs and cats, Flavour & Health, TopCat, Cat Meal, Limpi Cat, Gran Plus, Sabor & Vida, Faro, Biriba, Fiel

Websites: www.guabi.com

Vital stats: Mogiana Alimentos SA, operating as Guabi in their petfood division, manufactures animal food products. It produces products for dogs, cats, bovines, horses, pork, fish, shrimp, ostriches, and other animals, according to the company website. Gubai petfood products are available in Brazil, and exported to Europe, Asia, South America and the Caribbean.