

CATEGORY ANALYSIS

Pet Dental Care

More education for retailers and pet owners has led to a less reactive approach to addressing pet dental care. But there is more work to be done in terms of pet owners following through with tending to their pet's oral health. Taking small, consistent steps throughout the pet's life is the preferred approach rather than reacting once they see an expensive vet bill or waiting until the pet is experiencing pain and can't eat as a result of poor dental health or has to undergo stressful, painful treatment. Retailers suggest pet parents should be realistic when determining a course of action—will the pet parent actually brush their pet's teeth everyday? Choosing a solution that pet owners will follow through with, such as using a water additive, will guarantee success for pet parents and pets.

"I believe consumers are finally understanding that dental care is just as important for pets as it is for humans, particularly when they end up spending \$500 to \$700 for dental treatments at their veterinary office," said Denise Strong with Pawz on Main. "I'm finding that many of my customers take better care of their pets than themselves," Strong said. "There are so many product choices on the market that consumers find it a bit overwhelming to make a right decision on oral care. At Pawz On Main, I do all the research on product ingredients for them, so they know they are purchasing a safe, quality product that works. I stay away from products containing sweeteners, glycerin, petroleum, alcohol or gum, for example, and go with all-natural oral care remedies. We need more truly natural products for oral care available to us as labels that read 'natural' are very misleading."

"With regard to the humanization of pets, we definitely are seeing an increased focus on oral health, which is great news," said Matthew O'Leary with Felix & Oscar. "All too often we hear of the horror stories of pets having the majority of their teeth pulled due to poor oral hygiene, usually based on the misunderstanding by consumers that kibble can help clean teeth," O'Leary said. "Were that the case, I'd be brushing my teeth with potato chips. As more



"It's important to encourage the parent to be realistic in what they're actually willing to do, otherwise they just buy the products and never use them. It seems the real answer lies in providing enough opportunities for successful follow through,"

**Lorin Grow,
Furry Face**

pet parents focus on the pet's teeth and hygiene, they've come to find an abundance of products with natural ingredients that can keep the mouth clean and healthy for the life of the pet. With humanization, the go-to is of course brushing first, which can be difficult for many pets and pet owners. We find great success in the other forms of hygiene control, such as enzymatic brushless toothpastes and food toppers, along with the natural standby of raw frozen bones, chicken and turkey necks and other similar means used by the dog's wild ancestors," he said.

"Pet dental care has expanded in the past five years and there is a whole month (February) dedicated to pet dental awareness," said Beth Sommers with Pura Naturals Pet. "There are many more SKUs for consumers to select from when it comes to dental care for your family pets," Sommers said. "When we launched our Organic Dental Solutions, it was important to find the right partner. We were excited to launch with RADIUS, a well-known manufacturer of US-made toothbrushes and USDA Certified Organic toothpastes. We formulated a brush with special bristles specific to dogs and different needs you would

encounter for puppy, adult and senior dogs. The Sweet Potato & Cinnamon Dental Gel is USDA Certified Organic and made to food grade standards, so it's safe if swallowed. This SKU was immediately well received as it filled a void in the organic pet dental market."

"The pet dental care category has evolved because of responsible pet parents who realize the importance of their pet's dental health and manufacturers like TropiClean who continue to innovate healthy products like our TropiClean Fresh Breath solutions to better serve pets and their people," said James Brandly with TropiClean.

"It actually goes back further to the last 20 years, where we've seen pets as a whole move from the backyard into the house and now they're in the bed," said Stacey Harbour with Manna Pro Products. "They've become our new children and an amazing population on one end of the spectrum. There is also the new millennial approach to pets and perhaps this is a different way of approaching life," Harbour said. "But when you put your pet in bed with you, the importance of that fresh breath becomes ever more apparent and that's what we're seeing happening in addition to humanization trends. We're seeing trends that the pet parent is seeking similar products that they use for their own healthy habits at home for their pets. Dental care is a primary example of that. And in the past five years, we've really seen that dental care has exploded with the influx of brands in both the chews category as well as in traditional dental care products," she said.

"It's driven by the fact that pets are breathing in their owners' faces," Harbour added. "It's more apparent that there's a breath issue, whereas in the past it was kind of sight unseen or smells, and we didn't take as good of care of it and we dealt with bad hygiene or poor hygiene in the mouth by pulling teeth," she said. "Pet parents are also more concerned about the trauma they put the pet through, and so they're looking for more convenience. Brushing your dog's teeth or your cat's teeth for that matter, which I have done, is not easy. Not easy at all," she added.

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Todd Rowan: We define “natural” by looking at ingredients, sourcing practices and manufacturing processes. For Bixbi, all three are an important part of delivering a nutritious, healthy product regardless if the word “natural” is used as a descriptor or not.

Beth Sommers: “Natural” is a very broad term and is not regulated whatsoever. Most consumers assume that when they see the word “natural” on a product, the product is healthy, safe, and free of artificial or synthetic ingredients and chemical preservatives. “Natural” is used to make the consumer feel “better” about what they are buying, and, therefore, it can be very misleading when used incorrectly.

We have gone through the process of having the majority of our products certified organic by the United States Department of Agriculture (USDA). This ensures that the ingredients that we use in our pet products meet the highest quality and standards as defined by the USDA. When Pura Naturals Pet set out to change the way pet grooming products are made, we decided to make sure that our customers would understand and appreciate the rigorous set of standards we have and want to adhere to.

PPN: What attributes or manufacturing processes does your company utilize in an effort to make your products natural?

Hill: For our line of Holistic Hound phyto-cannabinoid-rich (PCR) hemp and mushroom supplements, we source our PCR oil from a U.S. provider who grows their hemp organically and uses clean extraction techniques, which are more environmentally friendly and result in a cleaner product than extraction methods that use butane or other toxic solvents. The ingredients in our PCR bites are organic and non-GMO, and the chicken we use is organically fed and pasture-raised by family farms local to our manufacturer.

Leary-Coutu: At Wellness, we thoughtfully prepare our recipes with carefully sourced ingredients to ensure all of our Wellness recipes are delicious, healthy and trustworthy. We want pet parents to feel good about the food they put in their pet’s bowl each day. That’s why we work with only the

most respectable and trustworthy suppliers to ensure uncompromised and wholesome nutrition for the pets who depend on us. We then carefully select authentic ingredients that are packed with nutrients your pet needs to thrive to produce natural, nutrient-dense, balanced recipes. Rigorous standards and practices are put into place during production to protect the integrity of our food, and our processing plant is meticulously sanitized to ensure this is the case. We also take extra precautions to make sure ingredients are properly stored, monitored and tested, because these measures are essential to producing the best

they can to help them live the longest, healthiest and happiest life possible. They want to know where the ingredients are coming from and how safe and sanitary the manufacturing facility is, while also giving their pet a meal that they are going to be excited to eat.

Novotny: Consumers are making a conscious choice when purchasing natural products due to the trust they are placing in the manufacturer to provide healthy choices for their pets.

Rowan: The word “natural” has lost its significance. When companies like Nestlé include it on their bags, we knew the in-

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—Beth Sommers of Pura Naturals Pet

food for your pet.

Sommers: We work with the USDA Certification program and their guidelines, which monitors every ingredient we use, the manufacturing process, as well as all of the labeling that goes on all of our products.

PPN: How has consumer perception about natural pet products evolved? What are they looking for in a natural product?

Hill: Sourcing has become a major focus of attention. Pet owners understand now that there is more to know than just what ingredients are in a food, treat or supplement. They want to know the sourcing of the ingredients and, for protein sources, what kind of treatment the animals received. This means hormone and antibiotic free, non-GMO diets and humane treatment.

Leary-Coutu: Consumers have become increasingly aware of the natural category, in large part because they’ve become more educated about where their own food is coming from and how it’s made.

Their priorities have shifted, which means their understanding of the category has shifted. Rather than buying pet food solely based on price and convenience, they want to give their pets the best food

industry had jumped the shark. Consumers know this and are simply looking for authentic brands that deliver on health and wellness. And they measure this by reading ingredient labels, much like they do for their own human food purchases.

Sommers: Animals are not just pets, they’re family. As more consumers focus on their own health and wellness with products that are manufactured and produced with sustainable and humane practices, they look for natural products for their four-legged family members as well. They know natural products are supposed to be free of chemicals and have actively begun to read labels in order to educate themselves. They also want to know what benefits each of these ingredients brings to their pet.

PPN: What trends are you noticing in the natural pet product segment? What is driving these trends?

Hill: There is an increased interest and demand for humane treatment of livestock. Companies such as Open Farm, Smallbatch, Honest Kitchen, Evermore and Answers are leading this positive movement with humane certification; GAP ratings; and organic, free-range, pastured and

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grass-fed meats. As consumers become more educated on the importance of these factors, the freeze-dried and frozen raw categories are naturally growing. In addition, as early evangelists of the many therapeutic benefits of both PCR hemp, including cannabidiol (CBD) and medicinal mushrooms, we are definitely witnessing a massive jump in the popularity and growth of this natural product segment, as more and more people become educated about the efficacy of these products for both their pets and themselves.

Leary-Coutu: We know that the natural shopper is hyper invested in their pet's health—this also means that they know mealtime is more than just a moment. It's an opportunity to make a difference in your pet's health and happiness, which means they're looking for new ways to make meals and snacks more exciting for their pet. This desire to do more has led to a rise in unique ingredients like raw, freeze-dried meat, as found in our new Wellness Core RawRev line of meals.

We've also seen an increase in mixers and toppers that help make each meal special. At Wellness, we want to make our pets' bowls anything but boring, which is why we recently introduced our Wellness Core Bowl Boosters, available in both Pure and Tender forms, to give pet parents options at mealtime. We've already received great feedback from consumers that their

attention paid to what they are feeding their pets. We feel a responsibility to only provide the best for our pets, since we are their providers making the natural choices for them.

Sommers: CBD oil and treats are really hot right now. CBD is also trending in the consumer marketplace. It is providing an amazing way to ease pain without harmful side effects.

Our Organic Dental Solutions and Tooth Gels are really taking off as well. Dental hygiene and oral care are just starting to penetrate the natural segment because consumers are now realizing that these products are digested and need to be closely monitored.

PPN: What should independent pet specialty retailers consider when vetting natural products for their stores?

Hill: Transparency is critical when we choose what products and brands to bring in to our store. We want to know where the product is coming from and be able to get quick answers from manufacturer reps should consumer questions arise. If there is a product concern or even a recall, we expect to have a timely and appropriate response and explanation that matches the care and concern we have for our customers and the well-being of their pets. We see this repeated on the manufacturing end—wholesalers and retail customers want to

of these two factors, so retailers should be sure to take an in-depth look at where manufacturers are sourcing their ingredients and producing their recipes.

Independent specialty retailers also have the unique perspective that can only come from face-to-face interactions with consumers, which means that they are very in tune with what it is their shoppers are looking for. This means they should consider having a variety of flavors, forms and textures to give their customers the wide selection that we see natural consumers actively seeking out on a regular basis.

Novotny: All products need to be evaluated for what segment they are targeting and how the product is a solution to a need. Being natural on top of serving a function makes it much easier to build trust with the customer.

Rowan: It's a fairly simple process of reading ingredient panels. Less is more. But stores should also look at each brand's history of delivering innovation based on nutrition. Companies like Bixbi, with health and wellness built into our DNA, deliver a trusted, high-quality product.

Sommers: Read the labels! They need to have a clear understanding of all of the ingredients and their function within the product itself. The stores should not be afraid to ask questions and do a little research. We pride ourselves on the transparency of our ingredients and have a special section on our website dedicated to ingredient education.

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—Glenn Novotny of Emerald Pet Products

dogs are more excited to see their bowl placed in front of them, so we expect to see this trend continue across the pet food space.

Novotny: The natural product trends we are seeing is for unique products that use the same ingredients we eat in our own diets. The humanizing of pets continues to grow as a segment with as much or more

see third-party testing so that they can be certain they are getting a clean, safe product.

Leary-Coutu: Ingredient sourcing and quality assurance should always be a key consideration when vetting natural products for retail. The consumers who shop at independent retailers are typically well versed in pet food and understand the importance

PPN: How can retailers and manufacturers work together to educate pet owners about natural products and their claims?

Hill: By disclosing their processes, ingredients and sourcing—manufacturers must provide both retailers and customers with the essential information needed to make informed decisions on what their pets are eating. This transparency also allows popular experts and advocates such as Dr. Karen Becker and Rodney Habib to endorse products that fit their message of fresh, minimally processed whole-food diets. These figures and exposé pieces, such as the documentary “Pet Fooled,” have driven people into stores looking to improve their pet's diet through natural means. Transparency allows manufacturers to honestly

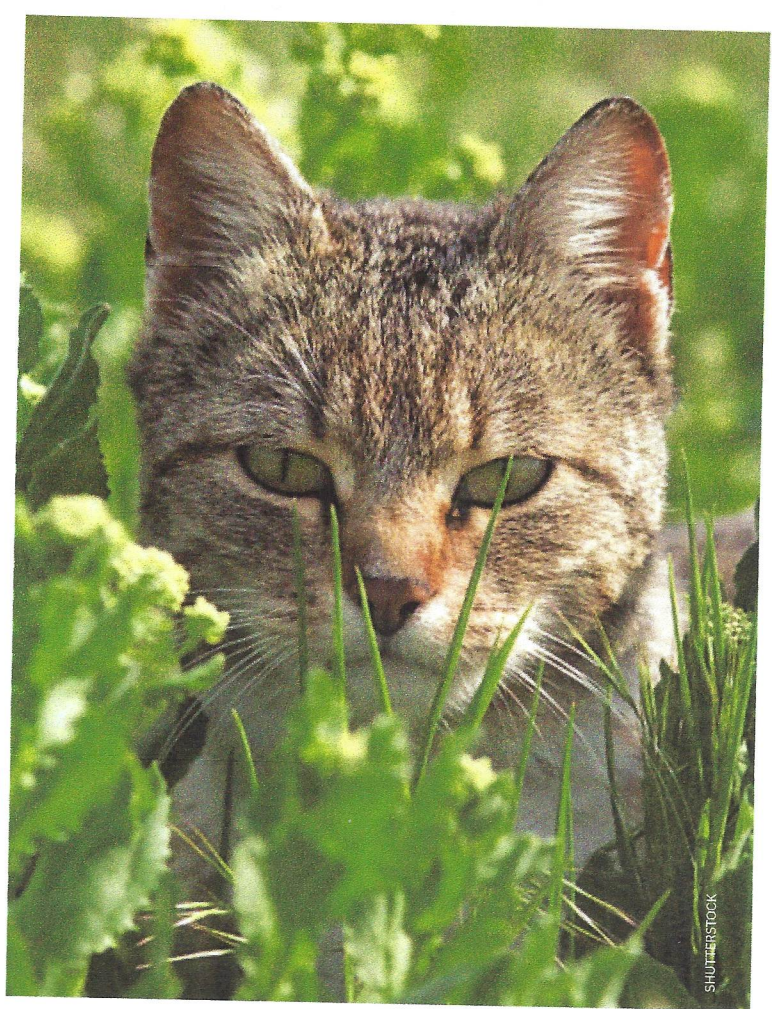
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promote their product, retailers to drive sales in the natural category and, ultimately, owners to provide the best products possible for the health of their pets.

Leary-Coutur: We all have a responsibility to educate because consumers are not just looking in one place for information. They're asking questions in-store, researching online, and taking advantage of social media to ask brands and other consumers for advice. This means we need to arm our retailers with enough materials and resources so that they feel well equipped to pass on their knowledge of this fast-growing category to pet owners. Pet food is such a personal choice, so we want all of our retailers to feel empowered to provide customized recommendations to their consumers based on the vast amount of knowledge available to them about natural pet food.

Novotny: Creating a treating center focused on all natural choices is an excellent way to highlight the selection offered in-store. Customer engagement at the store level is the best method for building a long-lasting relationship with the consumer.

Sommers: Ultimately, consumers will go to their local retailers as their trusted source, whether online or in-store. Manufacturers need to partner with their retailers and arm them with technical information since they interact directly with the customer. By providing added educational resources, they help the consumer evaluate differentiating features that impact their pets' specific needs. ☉



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