



RURAL INDUSTRIES RESEARCH
& DEVELOPMENT CORPORATION

Kangaroo Pet Meat Survey

**A report for the Rural Industries Research
and Development Corporation**

by PacALLIANCE (Australia) Pty Ltd

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Foreword

The Kangaroo products industry – meat, skins and leather has developed into the largest native animal industry in Australia. The majority of Kangaroo meat being processed goes into the production of pet food, mostly as fresh or minced product.

For various reasons there is considerable wastage of this valuable natural resource. Programs intended to lift the value perception of Kangaroo products will be beneficial to those involved in the industry and will direct commercial pressures towards the more efficient use of this resource.

The objective of this study, flowing from an earlier industry workshop (RIRDC Report PAC-No1), is to examine opportunities to increase consumer acceptance of Kangaroo meat as a valuable addition to a pet's diet: In particular the opportunity to gain endorsement from vets and breeders to such a proposition.

This project was funded from RIRDC Core Funds which are provided by the Federal Government.

This report, a new addition to RIRDC's diverse range of over 800 research publications, forms part of our Prospective New Industries: New Animal Products R&D program, which aims to accelerate the development of viable new animal industries.

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Simon Hearn

Managing Director

Rural Industries Research and Development Corporation

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Executive Summary

The Australian market for dog and cat food is substantial and while the majority of Kangaroo meat is sold into this sector, it is as an undervalued base commodity.

An industry scoping study in March 2002 indicated an interest in exploring attitudes of vets and breeders as a possible means of increasing the acceptance of fresh meat as part of a balanced diet for pets.

100 vets and 20 breeders from around Australia were selected and interviewed during this study. There is a high level of importance placed upon including fresh food in a pets diet (40% of vets and 80% of breeders). However when questioned further, two thirds of that interest related to the need for pets to have bones to chew.

There is a quite high level of interest in Kangaroo meat as a product for animals with dietary intolerance and for those requiring a lower fat diet.

It appears the interest in this specialist application for Kangaroo meat provides a basis on which to establish a niche, premium positioning thereby building a more positive overall consumer image. A reason, such as new information, is a necessary base upon which to build a change in public opinion. It appears this specialist, unique application for Kangaroo meat could be such a base for the Kangaroo Industry.

Such an approach will require a long term planned campaign directed initially to specialist animal nutritionists and vet dermatologists; then to vets and breeders in general; then to pet owners and pet food manufacturers (especially for special dietary products).

It is recommended that a professional Public Relations company experienced in influencing change in public opinion be contacted for a campaign outline.

1. Background

A scoping workshop was held in Sydney on February 18, 2002 involving representatives of kangaroo meat/pet foods marketers, to consider reports that segments of the pet meat buying public believe kangaroo pet meat may be “unhygienic” and what could/should be done to correct that perception.

The Key Findings from that workshop are repeated below as background information to this study.

Key Findings

- The sales of fresh pet meat were calculated at 20 - 30,000 tonnes of kangaroo meat plus 4,000 tonnes of dairy cadavers per annum. It was felt these figures had remained constant over the past several years.
- The pet meat market absorbs over 75% of the volume of kangaroo harvested each year. The on-going financial viability of that market is therefore critical to the continuing success of the kangaroo management plan and its efforts to control the total grazing pressure of kangaroos in the arid rangelands.
- Export sales were reported to be negligible. There used to be good sales to pet food manufactures, however the negative publicity associated with the kangaroo harvest caused that market to dry up. Furthermore chicken is available as a very cheap alternative. In the US market there is strong competition from feed lot cadavers. There is a small niche market for kangaroo to zoos for caged big cats due to its lean 2% fat content but that is a low price, low volume market.
- While the volume of fresh meat was constant, the retail dollar sales of pet food was trending strongly towards dry food, particularly the premium varieties. To some extent this was a result of the heavy promotion by pet food manufacturers. For example, Pet Care Co-op noted their dollar sales mix had changed as follows:

Value of sales	1997	2001
Fresh meat	41%	18%
Dry Food	48%	60%
Tinned Food	10%	22%

While these results are from one group of pet shops only, they indicate dramatic changes are taking place in the market. While volume sales of fresh pet meat may be holding, more and more consumers appear prepared to purchase the higher priced dry and canned products. Unless something is done to correct this situation, volumes will inevitably begin to fall and retailers will become less inclined to stock fresh pet meat. The task of doing something about this rests firmly at the feet of the pet meat suppliers, in effect the kangaroo industry.

- It was estimated that within specialist pet shops regular dry food was growing around 3-5%pa, whereas premium was growing around 10-15%pa. Supermarkets tended to promote the lower priced regular products. (some data on supermarket sales is included in Appendix 1).
- The global growth in pet food sales was noted as Dry +10%pa; Canned +1%pa.
- Supermarket sales of pre-packaged fresh meat were felt to be at the expense of pet shop sales rather than any change in total sales of fresh pet meat.
- 70% of people were reported to be pet owners, of whom 60% had a dog and 30% had a cat. Environmental concerns and council regulations were thought to be working against cat ownership.
- It was noted the Pet Industry Joint Advisory Council was undertaking a market research study shortly and that there may be an opportunity for KIAA to become involved.
- It was thought the image of kangaroo meat for pet usage was improving, with the increased acceptance of human consumption and the more information available on the management program.

2. Objectives

Resulting from the Scoping Exercise into the Impediments facing the Kangaroo Pet Meat Sector (RIRDC Project No PAC-1A, March 2002), the decision was made to undertake the market research outlined in that report. Particular emphasis to be placed on researching the attitudes of and ability/willingness of vets, vet nurses and breeders to promoting Kangaroo meat as part of a pet's diet.

In addition, copies of any previous consumer usage and attitudinal research would be sought (if available) and opportunities for in-store promotion examined.

Methodology

A representative sample of 100 vets and 20 breeders (10 dog and 10 cat) was drawn from all States and interviewed regarding their attitudes and practices (results included as Attachment 1).

In addition, members of the industry, vet dermatologists and retailers were interviewed.

We were unable to locate any consumer research that could be made available, however we did obtain data from the BIS Shrapnel report into the Pet Care Market in Australia, which is included as Attachment 2 to this report.

In addition, television network TCN Nine "A Current Affair" featured material from an article on Types of Pet Food published in "Choice" September 2002 issue (the Australian Consumer Association publication). Copies of that material are also included as Attachment 3A and 3B.

3. Key Findings

1. Survey findings

The following series of tables has been drawn from the survey results that are included in full as Attachment 1.

a) Discussion of diet with pet owners

All breeders and three-quarters of vets claim to discuss food as a matter of course. About half the vets also discuss it if the pet has a problem or if the owner asks.

Discuss diet.....	Total (n=120)	Vets (n=100)	Breeders (n=20)
As a regular matter of course/as part of the consultation	77%	72%	100%
If the pet has a problem	42%	48%	10%
If the owner asks	38%	43%	10%
At other times	4%	5%	-

(Note: n= the sample size and hence percentages relates to the number of Vets and/or Breeders who answered to a particular question relative to the total sample. Where more than one answer was given percentages can total to greater than 100%)

b) Types of food sold

Virtually all vets and most breeders sell pet food, primarily dry food and to a slightly lesser extent canned food, the incidence of fresh meat sales is very low. Where mention was made, it appears most emphasis in such outlets is on specialist/premium products. Possibly for these reasons plus the issues of storage and handling, sales of fresh meat are very low and not reflective of the total pet food market.

Type of food sold.....	For Dogs (n=110)	For Cats (n=110)
Dry	96%	93%
Treats	86%	55%
Canned	77%	81%
Supplements	69%	60%
Sausage/cello-pack	33%	12%
Fresh meat	7%	5%
Do not sell/give any food	4%	6%

(Note: n= the sample size and hence percentages relates to the number of Vets and/or Breeders who answered to a particular question relative to the total sample. Where more than one answer was given percentages can total to greater than 100%)

When looked at by type of pet, the situation becomes:

Dogs

Vets sell a wider variety of dog food and supplements; whereas breeders are less likely to sell treats and canned food. Breeders on the other hand are much more likely to sell/give fresh meat.

Type of food sold for dogs....	Total (n=110)	Vets (n=100)	Breeders (n=10)
Dry	96%	97%	90%
Treats	86%	92%	30%
Canned	77%	84%	10%
Supplements	69%	75%	10%
Sausage/cello-pack	33%	36%	-
Fresh meat	7%	4%	40%
Do not sell/give any food for dogs	4%	3%	10%

(Note: n= the sample size and hence percentages relates to the number of Vets and/or Breeders who answered to a particular question relative to the total sample. Where more than one answer was given percentages can total to greater than 100%)

Cats

Cat breeders are less likely to provide any food than are dog breeders. The main types of food provided for cats by both vets and breeders are dry and canned. Again breeders are more likely to sell fresh meat.

Type of food sold for cats....	Total (n=110)	Vets (n=100)	Breeders (n=10)
Dry	93%	97%	50%
Canned	81%	84%	50%
Supplements	60%	65%	10%
Treats	55%	59%	10%
Sausage/cello-pack	12%	13%	-
Fresh meat	5%	3%	20%
Do not sell/give any food for cats	6%	3%	40%

(Note: n= the sample size and hence percentages relates to the number of Vets and/or Breeders who answered to a particular question relative to the total sample. Where more than one answer was given percentages can total to greater than 100%)

c) Importance of fresh food in diet

Breeders are more likely than vets to consider fresh food important for both dogs and cats, but the difference is particularly marked for cats.

Importance of fresh food in diet.....	For Dogs		For Cats	
	Vets (n=100)	Breeders (n=10)	Vets (n=100)	Breeders (n=10)
Very important	17%	40%	14%	90%
Quite important	23%	20%	26%	10%
Important	40%	60%	40%	100%
Neither important nor unimportant	20%	-	17%	-
Not so important	31%	10%	33%	-
Not at all important	9%	30%	10%	-
Not important	40%	40%	43%	-

(Note: n= the sample size and hence percentages relates to the number of Vets and/or Breeders who answered to a particular question relative to the total sample)

d) Importance of Fresh Food by Area

When the responses are looked at by State, respondents in Sydney and Brisbane are more likely to consider fresh food important, with those in Sydney being more inclined to say it is “very” important.

	Syd (n=33)	Melb (n=33)	Bris (n=17)	Adel (n=16)	Perth (n=11)	Total (n=110)
For Dogs						
Very important	30%	12%	12%	19%	18%	19%
Quite important	18%	21%	47%	19%	9%	23%
	48%	33%	59%	38%	27%	42%
For Cats						
Very important	27%	18%	19%	18%	18%	21%
Quite important	27%	18%	44%	18%	18%	24%
	54%	36%	63%	36%	36%	45%

(Note: n= the sample size in each city and hence percentages relates to the number of Vets and Breeders who answered to a particular question relative to the total sample.)

e) Reasons for fresh food being important/not important

The main reason for fresh food being desirable is to provide bones for the teeth. Those who do not consider fresh food important mostly feel commercial products are well balanced and provide all needs.

	For Dogs (n=110)	For Cats (n=110)
Important because.....		
Need bones for teeth	40%	37%
For a bit of variety	9%	10%
To get a well balanced diet	8%	6%
Close to what they eat in the wild	7%	8%
Balanced diet/extra nutrients	3%	5%
Other	9%	7%
	61%	59%
Not important because.....		
Commercial products are well balanced/all they need	47%	46%
As long as they get good quality commercial brand	10%	8%
Other negative	8%	5%
	57%	56%

(Note: n= the sample size and hence percentages relates to the number of Vets and/or Breeders who answered to a particular question relative to the total sample. Where more than one answer was given percentages can total to greater than 100%)

f) Attitude to recommending Kangaroo Meat

Vets are fairly evenly divided between being positive, negative and neutral towards recommending Kangaroo meat. Dog breeders tend to be negative towards recommending Kangaroo meat, while cat breeders are more divided in their opinion.

Would consider recommending Kangaroo meat.....	For Dogs		For Cats	
	Vets (n=100)	Breeders (n=10)	Vets (n=100)	Breeders (n=10)
Yes	30%	10%	22%	40%
No	30%	80%	38%	60%
Maybe	40%	10%	40%	-

(Note: n= the sample size and hence percentages relates to the number of Vets and/or Breeders who answered to a particular question relative to the total sample)

Except for Perth where there is a greater degree of uncertainty/negativity towards recommending Kangaroo meat, the other States are all very close to the national average.

g) Main reasons for considering recommending Kangaroo meat

Amongst the respondents who indicated they would or might consider recommending Kangaroo meat, the main reasons for doing so are its suitability for dietary intolerances and its lower fat content.

	For Dogs (n=70)	For Cats (n=62)
For dietary intolerances	56%	43%
Lower in fat/if low fat indicated	21%	18%
Good source of protein	11%	11%
Good if skin allergies	11%	-
Provided it is only a small part of their diet	7%	11%
For their teeth and gums	6%	8%
Fresh meat is important in diet	6%	6%
Is palatable/fussy eaters like it	4%	8%
As an alternative/addition to diet/for variety	4%	8%
Other	9%	11%
Total positive comments	135%	124%

(Note: n= sample size of those Vets and Breeders who indicated they “would” or “might” consider recommending Kangaroo meat. Hence percentages relate to that sample size. Approximately 1/3rd gave more than one reason)

h) Main reasons for not recommending Kangaroo meat

Amongst the respondents who indicated they would not consider recommending Kangaroo meat, the main negatives to recommending Kangaroo meat are that it is not necessary or that it does not provide a balanced diet/adequate nutrition, together with the concern that for cats it can become addictive.

	For Dogs (n=45)	For Cats (n=56)
Not necessary/premium dry foods give balanced diet	33%	24%
Not a balanced food/not as nutritional	24%	19%
No fat/need some fat	11%	12%
Personal preference/national emblem	9%	7%
Risk of hydatids	7%	5%
Too rich	4%	3%
Can be addictive/wont eat anything else	2%	20%

Other	22%	22%
Total	112%	112%

(Note: n= sample size of those Vets and Breeders who indicated they “would not” consider recommending Kangaroo meat. Hence percentages relate to that sample size. Approximately 1 in 10 gave more than one reason)

i) Interest in information on the benefits of Kangaroo meat

There is quite a good level of interest in the idea of receiving information about the benefits of Kangaroo meat for dogs or cats to help them make such dietary recommendations, with vets being a little more positive than breeders

	Vets (n=100)	Breeders (n=20)
Yes would be interested	73%	60%
No would not be interested	27%	40%

(Note: n= the sample size and hence percentages relates to the number of Vets and/or Breeders who answered to a particular question relative to the total sample)

There is a slightly higher level of interest in the nutritional aspects of Kangaroo meat than in factual information on the industry itself.

Interested in leaflets/support material on.....	Vets (n=100)	Breeders (n=20)
Nutritional analysis of Kangaroo meat	65%	65%
Question & answer type information leaflet	59%	60%
Factual information on the Kangaroo industry	56%	65%
Other information	3%	-
No information required	27%	40%

(Note: n= the sample size and hence percentages relates to the number of Vets and/or Breeders who answered to a particular question relative to the total sample. Where more than one answer was given percentages can total to greater than 100%)

2. Allergies & Dietary Intolerance

The fact that a third of Vets mentioned the issue of allergies and dietary intolerance as a main reason for considering recommending Kangaroo meat, identifies a possible dietary/quasi-veterinary reason to promote Kangaroo meat.

This could form a scientific base on which to dramatically change consumer perception of Kangaroo meat – in much the same way as the importance of Omega 3 fatty acids in human diet has changed the image of what were previously less desirable species of seafood.

Veterinary dermatologists confirmed that allergies in pets are very common, often caused by airborne allergens. However because the symptoms of food allergy and airborne allergies are very similar it is normal practice to eliminate food allergies first as that is usually quicker and hence cheaper. The standard practice is to put the animal on a strict elimination diet. Because Kangaroo meat is not used in canned or dry pet foods it is most often the protein source of choice by the vet dermatologists.

3. Pet Food market information

Two sources of market size estimates were identified (BIS Shrapnel report – selected tables included as Attachment 2; and a Foodweek article published 19/11/2001). While there was some difference in the total grocery market value projections (possibly due to differences in definition), the segment share estimates were very similar in both cases, as shown below.

Grocery sales of processed dog and cat food

	BIS Shrapnel		Foodweek
	1994	1998	2001
	\$ million	\$ million	\$ million
Total Sales	711	803	723
Segment shares			
Dog Food - Canned	40%	37%	41%
Dog Food – Dry	21%	24%	21%
Cat Food – Canned	29%	28%	28%
Cat Food – Dry	10%	11%	10%

While sales to retail grocery stores are substantial, these estimates exclude non-processed products (which BIS Shrapnel estimated at a further 57%), and sales through non-grocery outlets such as pet shops etc.

Whichever way it is looked at, the market is well over a billion dollars at wholesale value. Promotional pressure by the major manufacturers is developing the premium sector, further increasing the value.

The return to the Kangaroo industry from establishing a premium niche as compared with being an under-valued commodity ingredient could be considerable.

In addition to this market size information the Australian Consumers Association in their September 2002 issue of Choice magazine have published an article comparing various brands of processed (dry or canned) pet food under the headline “You want the best for your pet. But do dogs and cats really need expensive, fancy food? What should they be eating?” The full transcript from the ACA web site is included as Attachment 3B, however the In Brief summary is as follows:

- *For most healthy pets there’s no evidence that ‘premium’ pet foods improve overall health and longevity, compared to cheaper foods that meet appropriate standards. Look for claims of a food being ‘complete and balanced’.*
- *Dry pet food has a higher energy content than wet food, so your pet doesn’t need to eat as much of it. And it’s good for their dental health.*

With pet food, "the best for your pet" now seems to mean "omegas for skin and coat health", "antioxidants for systemic health" or even "a new approach to health" altogether. If you took too much notice of some of those ads, you’d start thinking it was downright irresponsible to keep feeding your moggy from a carton or your pooch from a tin. But that’s not true. Many of the ordinary pet foods available in supermarkets have been tested to a high standard to ensure they provide a complete and balanced diet. You don’t generally need fancy foods to keep your cat or dog healthy, or to pay the high prices asked for premium foods sold through pet shops and vet clinics.

The TCN Nine network picked up on that article and featured a segment in the national program A Current Affair which went to air on September 19 2002. In addition that program included interviews with a breeder and with a vet who stated their reasons for choosing the premium products. Again the transcript from that program as featured on the A Current Affair web site is included as Attachment 3A.

4. Possible Strategies

Based upon the findings of the research there appears to be the opportunity to position Kangaroo meat as a specialist niche product with several unique advantages for pets. These include:

- Recommended for pets with dietary intolerance and/or allergies

- Low in fat with no cholesterol

- Untreated with chemicals (such as drenches, inoculations etc. as in other sources of meat protein)

As these benefits are largely dietary/veterinary it would be more believable to consumers if they were recommended/endorsed by vets rather than suppliers, particularly specialist vets (such as animal nutritionists, vet dermatologists etc.)

Such an approach consists of both an educational task and an image modification task. Also the target audience is both the professionals (vets and breeders) and the consumers/pet owners.

With the strong consumer preference for pre-prepared pet food (dry, canned, minced) promotion would need to be for Kangaroo meat as an ingredient/major ingredient to be looked for in such products. In many respects this would be similar to the promotion by G. D. Searle for NutraSweet as a non-sugar sweetener to be looked for in soft drinks, biscuits etc.

With the significant negative publicity generated by the anti-kangaroo lobby any such approach is likely to require professional coordination over a long period of time. It will also require support by a committed industry prepared to make the necessary investment and prepared to ensure strict self regulation on issues such as humane slaughter, hygienic handling and quality control.

5. Recommendation

Based upon this research, it is recommended that the opportunity to pursue vet endorsement for Kangaroo meat as a specialist product for pet food should be further developed.

We recommend a multi faceted campaign should be developed around the positioning of Kangaroo meat as a vet recommended product for those special pet food situations of animals with dietary intolerance and/or allergies, supported by the chemical free/organic status.

We see this campaign involving the development of relationships with leading specialists and teaching organisations in animal nutrition and veterinary dermatology (both in Australia and internationally), including funding of research papers for presentation at conferences and publication in vet journals.

This “scientific information” would then be communicated to the general public through releases to specialist media programs, breeders, breed clubs, consumer associations etc. and through leaflets to vet practices etc.

Through this gradual process of changing public opinion, manufacturers of pet foods will begin to see the value of including and promoting the use of Kangaroo meat in all or a specialised range of their products (e.g. low allergen diet products).

Such a campaign would need to be carefully constructed and managed over a medium to long term.

We recommend that a specialist Public Relations company be engaged to develop and manage the campaign for the KIAA. No doubt such a campaign will not be cheap, however without taking such a positive stance towards changing the image of Kangaroo meat it will always remain as an undervalued or rejected product.

On a purely non-obligatory basis, a leading world-wide Public Relations company (Hill and Knowlton) was approached for their thoughts on how such a campaign might be constructed. Their proposal is included as Attachment IV to provide an indication as to how such a company might approach the task. In no way should it be construed that the author is recommending that organisation or that proposal; for example it would appear that to a large extent much of what is suggested in their steps 1 and 2 is already available from this and other research conducted by KIAA.

6. Appendices

Appendix 1

Extracts from RIRDC Project No PAC-1A March 2002

“Report of the Scoping Exercise into the Impediments facing the Kangaroo Pet Meat Sector”

PROBLEM ANALYSIS

- The issues driving consumption patterns were seen to be:
 - Convenience of handling and storage of dry/canned product
 - Perception that manufactured products provided a more balanced diet
- The problem was seen as one for fresh pet meat generally, not specifically kangaroo meat.
- Fresh pet meat purchasers did not appear to have concerns regarding use of kangaroo meat.
- The main competition was dry food and cooked rolls.
- The main issue for suppliers is price, not availability of product. How to increase the consumer’s value perception. For example fresh meat retails at \$2/kg (20% protein), compared to premium dry dog food at \$10/kg (30% protein).
- As 80% of fresh pet meat sold is kangaroo any promotion of “fresh is best” largely benefits the kangaroo industry. For the same reason there was seen to be little benefit from trying to address any consumer concerns regarding the image of kangaroo meat, as it is not a matter of increasing the kangaroo share of fresh pet meat. Rather it is a matter of increasing consumer acceptance and use of fresh pet meat per se.
- Furthermore as the other major pet meat source is dairy cadaver, any effort to lift the market will rest solely on the shoulders of the kangaroo industry. (This also raises the issue of the level of cooperation within the industry.)

OPPORTUNITY ANALYSIS

- The opportunity to supply processors of dry/canned is limited by the price & availability of other protein sources (e.g. chicken at \$0.15-\$0.20/kg, vegetable protein, offal etc.) and is not seen as a viable opportunity.
- As noted earlier, export is a very limited niche market, compounded by the misinformation concerning the kangaroo harvest.
- The major opportunity areas were seen to be:
 - Cat owners (via supermarkets)

- Grey hound owners (small segment, buy on price. Kangaroo on the East Coast, horse in the West)
- Show breeders (small segment, more discerning, pay for quality, pass on information)
- Dog owners (promoted as part of a varied diet for dogs)
- The most cost effective promotional medium was seen as using influencers (vets, breeders etc) to reinforce existing fresh meat users, to encourage new pet owners to use fresh meat and possibly to encourage non-users to change.
- The way to do this was suggested as being the provision of factual information on nutrition and the importance of a varied diet. As well, the reality regarding worms and the use of SO₂ preservative needed to be addressed. This could include articles within professional and breed association journals, pamphlets, attendance at trade shows etc.
- The key influencers were seen to be:
 - Vets
 - Vet Nurses
 - Breeders
 - Pet clubs, pet groups
 - Pet shops
- It was also suggested opportunities to consider differentiated products could be explored—e.g. meat with bone in, puppy brisket etc.

Recommendations

There was agreement in principle from those in the workshop that the issue of lifting the value of this market was worth serious consideration. Any final decision would require a specific proposal including funding options.

While the difficulties of gaining industry cooperation were very familiar to all, it was felt that to do nothing would guarantee the sector continued to lose market share and risk actual decline in value for all participants in the supply chain.

While the industry was unlikely to ever fund direct consumer promotion it was felt there should be real opportunities to cost effectively gain the active endorsement of people whose opinion was respected by consumers.

It was agreed that any such educational/PR campaign needs to be carefully targeted. Those present did not have the detailed knowledge of the key influencers, their opinions regarding fresh pet meat, their requirements for information on fresh meat, their preparedness to endorse the product to pet owners etc.

Thus the final recommendation from the workshop was for the KIAA to urgently seek funding opportunities for a market research study to understand the issues and opportunities

involved in gaining endorsement by those key influencers for fresh pet meat. This market research should specifically address the following questions identified by the workshop:

- Clarify exactly what share of the fresh pet meat market kangaroo holds
- What are the “hot buttons” to target in Vets and Vet Nurses to get them to promote fresh meat. Is the importance of fresh meat in a diet stressed in their formal training?
- What do supermarkets see as the opportunities in the fresh meat sector?
- What cost effective promotion at the pet shop level is possible?
- What available consumer market research is already out there?
- What opportunities are available to target the breeder sector broadly?

Based upon the results of that research an educational/PR plan could be prepared, costed and presented to the industry for consideration and funding.

Participating Organisations

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Mr.	Tom	Thompson	Pet Care Co-op	6/73 Willarong Rd	Caringbah NSW 2229
Mr.	Geoff	Hemmings	Kongs Pty Ltd	6 Advance Street	Schofields NSW 2762
Mr.	Ray	Davis	Clinkat Pty Ltd	PO Box 1088	Dubbo NSW 2830
Mr.	Syd	Pond	Pets World	PO Box 1078	Wangara WA 6065
Mr.	Neil	Ellery	Beta Group	20 Railway Pde	Welshpool WA 6106
Mr.	John	Kelly	KIAA	PO Box 447	Woden ACT 2606
Dr.	Peter	McInnes	RIRDC	PO Box 4776	Kingston ACT 2604

Market Data

Consumer Attitudes – RIRDC Report 97/36

General/Human Consumption

- 41% concerned about hygiene aspects
- 29% so concerned as to be reluctant to eat it
- 38% felt it should be cooked “Well Done” not “Rare”
- 27% concerned about eating it because of field harvest
- 71% concerned about hygiene of field harvest
- 47% concerned at level of checking/testing
- 22% concerned at health issues - worms/disease
- 16% felt was not as disease free as sheep or cows

Pet Meat usage

- 14% used kangaroo meat for their pets
- 13% felt kangaroo meat should only be used for pet food

Market Estimates - Kangaroo Meat

RIRDC, 1998

(Based upon ABARE data)

<u>Pet Meat</u>	Vol.	Value
Domestic	20,000T	\$20-\$30M
Export	500T	\$0.5M
<u>Human Consumption</u>		
Domestic	500-1,000T	\$2.5-\$5.0M
Export	1,900T	\$5.4M

Macarthur Consulting Pty Ltd, 1997

- Sydney market 80-120 tonnes/week
- Melbourne market 30-40 tonnes/week

Supermarket sales

Selected extract from Foodweek No 1625 19/11/2001

- 4 million householders in Australia collectively care for 3.8 million dogs, 2.9 million cats, 9.7 million birds and 11.89 million fish.
- The total pet care market is worth \$3 billion a year. For a number of years it has been growing by about 10%pa. The petfood market is estimated to be worth \$920 million a year.
- Friskies brand manager indicated:
 - Catfood both wet and dry (but excluding treats) was not growing and represented 38.4% of the total petfood market.
 - Dogfood had about 53% value share
 - Pet accessories and treats about 9%
- Approximate market segmentation as follows:

	Wet	Dry	Total
Dog Food	\$300 million	\$149 million	\$449 million
Cat Food	\$200 million	\$74 million	\$274 million

- Uncle Ben's indicated the following market shares within the supermarket dog food category (moving annual total at October 21, 2001):

	% value share
Uncle Ben's of Australia	52.2%
Friskies	25.9%
Green's Foods	8.5%
Generics	9.1%
Others	4.3%

	% value share
Uncle Ben's of Australia	72.4%
Bush's	11.0%
Generics	5.8%
Chubpak	4.6%
Others	6.2%

- Bush's Pet Food's volume share of the wet food market has increased considerably to 15% (volume) of wet catfood and 23% (volume) of wet dogfood.

Attachment 1 Survey results

Objectives

- To understand the attitudes of Vets and Breeders around Australia to the value of fresh kangaroo meat in a pet's (dog and cat) diet.
- To obtain an indication of their willingness to recommend fresh kangaroo meat to pet (dog and cat) owners.
- To get an indication of the type of support material they see as necessary or beneficial for them to make such recommendations.

Main Findings

- All vets and breeders claim to discuss diet and food recommendations with their clients. Whilst it is probable that some vets might not necessarily do this on a regular basis these figures show that both vets and breeders are an important source of dietary information.
- Most vets and breeders sell pet food, which is mainly dry or canned. Fresh food is sold by only a very small number.
- Breeders are more likely than vets to consider fresh food to be important, particularly cat breeders. Less than half the vets think fresh food is important for cats or dogs. It is possible that the greater importance amongst breeders is due to their dealing mainly with puppies or kittens.
- The main reason for considering fresh food important is the beneficial effect of bones on teeth and gums. The main negative reason is that commercially prepared food provides a more balanced diet.
- Dog breeders have little interest in recommending kangaroo meat, but cat breeders are fairly equally divided between those who would and would not recommend it.
- Whilst just under one-third of vets would consider recommending kangaroo meat, there is another one-third who say they would maybe do so. The main positives for the meat are its perceived suitability for dietary intolerances and its low fat.
- Three-quarters of vets and two-thirds of breeders expressed interest in receiving information about kangaroo meat. Nutritional analysis, a Q&A type leaflet and facts about the industry aroused fairly equal interest.

Conclusions

Results of this study indicate there is some potential to increase recommendations for kangaroo meat from vets or breeders. However there are several factors working against such recommendations:

- Many respondents believe that commercial dry or canned foods provide a more balanced diet than fresh meat and are better for pets
- Most vets and breeders sell dry and canned meat themselves so recommendations for other food goes against their commercial interest. As they already believe these packaged products meet dietary requirements they are more likely to recommended them.
- Whilst some importance is attached to fresh meat, much of this relates to the benefits of bones for the teeth and gums.

With this said there is quite good interest in receiving information about kangaroo meat and it is probable that many of these people do not know a great deal about it. At the moment its main value is perceived to be for pets with dietary problems or a need for a low fat diet.

As it is unlikely that the meat will be seen to provide a balanced diet in itself, it seems probable that its future is as a niche market.

Whether Diet Discussed

All respondents claimed to discuss diet with their clients or recommend certain types of food for the pets.

	Total n=120 %	Vets n=100 %	Breeder s n=20 %
Discuss diet or recommend food types	100	100	100

When Diet Discussed

All the breeders and three-quarters of the vets claim to discuss food as a matter of course. About half the vets also discuss it if the pet has a problem or if the owner asks.

	Total n = 1 2 0 %	V e t s n = 1 0 0 %	B r e e d e r s n = 2 0 %
As regular matter of course/part of consultation	77	72	100
If the pet has a problem	42	48	10
If owner asks	38	43	10
At other times	4	5	-

Types of Food Sold

Dry and canned food are main types for both dogs and cats, with treats also being a main item sold for dogs. The incidence of fresh meat is very low.

	F o r D o g s n = 1 2 0 %	F o r C a t s n = 1 2 0 %
D r y	9 6	9 3
T r e a t s	8 6	5 5
C a n n e d	7 7	8 1
S u p p l e m e n t s	6 9	6 0
S a u s a g e / c e l l o p a c k	3 3	1 2
F r e s h m e a t	7	5
D o n o t s e l l / g i v e a n y f o o d	4	6

Types of Food Sold for Dogs

Vets sell a wider variety of dog food whereas breeders are less likely to sell treats, canned food or supplements. Breeders however are much more likely to sell/give fresh meat.

	T o t a l n = 1 2 0 %	V e t s n = 1 0 0 %	B r e e d e r s n = 1 0 %
D r y	9 6	9 7	9 0
T r e a t s	8 6	9 2	3 0
C a n n e d	7 7	8 4	1 0
S u p p l e m e n t s	6 9	7 5	1 0
S a u s a g e / c e l l o p a c k	3 3	3 6	-
F r e s h m e a t	7	4	4 0
D o n o t s e l l / g i v e a n y f o o d f o r d o g s	4	3	1 0

Types of Food Sold for Cats

Cat breeders are less likely to provide any food than dog breeders. The main types provided for cats by both vets and breeders are dry and canned. Again breeders are more likely to sell fresh meat.

	T o t a l n = 1 2 0 %	V e t s n = 1 0 0 %	B r e e d e r s n = 1 0 %
D r y	9 3	9 7	5 0
C a n n e d	8 1	8 4	5 0
S u p p l e m e n t s	6 0	6 5	1 0
T r e a t s	5 5	5 9	1 0
S a u s a g e / c e l l o p a c k	1 2	1 3	-
F r e s h m e a t	5	3	2 0
D o n o t s e l l / g i v e a n y f o o d f o r c a t s	6	3	4 0

Importance of Fresh Food in Diet

Breeders are more likely than vets to consider fresh food important for both dogs and cats, but the difference is particularly marked for cats.

	F o r D o g s		F o r C a t s	
	V e t s n = 1 2 0 %	B r e e d e r s n = 1 0 %	V e t s n = 1 0 0 %	B r e e d e r s n = 1 0 %
Very important	17	40	14	90
Quite important	<u>23</u>	<u>20</u>	<u>26</u>	<u>10</u>
	40	60	40	100
Neither important nor unimportant	20	-	17	-
Not so important	31	10	33	-
Not at all important	<u>9</u>	<u>30</u>	<u>10</u>	-
	40	40	43	-

Reasons for Fresh Food Being Important/Not Important

The main reason for fresh food being desirable is to provide bones for the teeth. Those who do not consider fresh food important mostly feel commercial products are well balanced and provide all needs.

	D o g s n = 1 1 0 %	C a t s n = 1 1 0 %
P O S I T I V E	61	59
Need bones for teeth	40	37
For a bit of variety	9	10
To get a well balanced diet	8	6
Close to what eat in wild	7	8
Balanced diet/extra nutrients	3	5
Other	9	7
N E G A T I V E	57	56
Commercial products are well balanced/all they need	47	46
As long as they get good quality commercial brand	10	8
Other negative	8	5

Importance of Fresh Food by Area

Respondents in Sydney and Brisbane are more likely to consider fresh food important, with those in Sydney being more inclined to say it is “very” important.

	S y d n = 3 3 %	M e l b n = 3 3 %	B r i s n = 1 7 %	A d e l n = 1 6 %	P e r t h n = 1 1 %
F O R D O G S					
V e r y i m p o r t a n t	3 0	1 2	1 2	1 9	1 8
Q u i t e i m p o r t a n t	<u>1 8</u>	<u>2 1</u>	<u>4 7</u>	<u>1 9</u>	<u>9</u>
	4 8	3 3	5 9	3 8	2 7
F O R C A T S					
V e r y i m p o r t a n t	2 7	1 8	1 9	1 8	1 8
Q u i t e i m p o r t a n t	<u>2 7</u>	<u>1 8</u>	<u>4 4</u>	<u>1 8</u>	<u>1 8</u>
	5 4	3 6	6 3	3 6	3 6

Whether Would Consider Recommending Kangaroo Meat

Dog breeders tend to be negative towards recommending kangaroo meat but cat breeders are fairly divided in their opinion. Vets divide fairly equally amongst being positive, negative and neutral.

	Dogs		Cats	
	Vets	Breeders	Vets	Breeders
	n=120 %	n=10 %	n=100 %	n=10 %
Yes	30	10	22	40
No	30	80	38	60
Maybe	40	10	40	-

Whether Would Consider Recommending Kangaroo Meat

Whilst fewer respondents in Perth would be prepared to recommend kangaroo meat, this is partly due to a higher level of uncertainty in this area. Other differences are probably due to the small bases in each area.

	Syd n=33 %	Melb n=33 %	Bris n=17 %	Adel n=16 %	Perth n=11 %
D O G S					
Yes	30	33	35	19	9
No	33	27	41	44	36
Maybe	36	39	24	38	55
C A T S					
Yes	24	24	38	24	-
No	33	39	38	53	46
Maybe	42	36	25	24	55

Positive Attitudes to Kangaroo Meat

Main reasons for considering kangaroo meat are its suitability for dietary intolerances and its lower fat content.

	D o g s n = 1 1 0 %	C a t s n = 1 1 0 %
F o r d i e t a r y i n t o l e r a n c e s	3 6	2 5
L o w e r i n f a t / i f l o w f a t i n d i c a t e d	1 4	1 0
G o o d s o u r c e o f p r o t e i n	7	6
G o o d i f s k i n a l l e r g i e s	7	-
P r o v i d e d i t i s o n l y s m a l l p a r t o f t h e i r d i e t	5	6
F o r t h e i r t e e t h a n d g u m s	4	5
F r e s h m e a t i m p o r t a n t i n d i e t	4	4
P a l a t a b l e / f u s s y e a t e r s l i k e i t	3	5
O t h e r	8	7

Negative Attitudes to Kangaroo Meat

Main negatives to recommending kangaroo meat are that it is not necessary or that it does not provide a balanced diet/adequate nutrition.

	D o g s n = 1 1 0 %	C a t s n = 1 1 0 %
N o t n e c e s s a r y / p r e m i u m d r y f o o d s g i v e b a l a n c e d d i e t	1 4	1 3
N o t b a l a n c e d f o o d / n o t a s n u t r i t i o n a l	1 0	1 0
N o f a t / n e e d s o m e f a t	5	6
P e r s o n a l p r e f e r e n c e / n a t i o n a l e m b l e m	4	4
R i s k o f h y d a t i d s	3	3
T o o r i c h	2	2
C a n b e a d d i c t i v e / w o n ' t e a t a n y t h i n g e l s e	1	1 1
O t h e r	1 2	6

Interest in Receiving Free Information on Benefits of Kangaroo Meat

There is quite good interest in receiving free information about the benefits of kangaroo meat for dogs or cats, with vets being a little more positive than breeders.

	Vets n=100 %	Breeders n=20 %
Yes would be interested	73	60
No would not be interested	27	40

Interest in Receiving Free Information on Benefits of Kangaroo Meat by Area

Interest in information is lower in Melbourne.

	Syd n=33 %	Melb n=33 %	Bris n=17 %	Adel n=16 %	Perth n=11 %
Yes would be interested	78	56	72	83	75
No would not be interested	22	44	28	17	25

Types of Leaflets/Support Material Which Would be of Interest

There is quite good interest in receiving free information about the benefits of kangaroo meat for dogs or cats, with vets being a little more positive than breeders.

	Vets n = 100 %	Breeders n = 20 %
Nutritional analysis of kangaroo meat	65	65
Q & A type information leaflet	59	60
Factual information on the kangaroo industry	56	65
Other information	3	-
No information required	27	40

Characteristics of respondent organisations interviewed

No. of Employees in Business

	V e t s n = 1 0 0 %	B r e e d e r s n = 2 0 %
1 - 2	5	8 0
3 - 5	2 3	1 0
6 - 8	3 8	1 0
9 - 1 0	2 0	-
1 1 +	1 4	-

Characteristics of Breeders interviewed

Dogs

Shetland Sheep Dog, Borzoi, Border Collie, Cavalier King Charles Spaniel, Bassett, Bernese Mountain Dogs, Bichon Frize, Yorkshire Terriers, Golden Retrievers, Airedales, Manchesters, Australian Cattle Dogs, Kelpies, Beagles.

Cats

Birman, Siamese, Abyssinians, Ballinese, Samali, Oriental, Neron Rex, Burmese, British Shorthairs, Chinchilla, Himalayans, Asahji, Ocicats.

Attachment 2 BIS Shrapnel data

Selected tables drawn from the BIS Shrapnel report “Contribution of the Pet Care Industry to the Australian economy”

Pet food expenditure 1998

	\$ Million	% total
Manufactured/processed (including drink)		
• Dogs	610	
• Cats	360	
Subtotal	970	59
Non-manufactured/processed (including milk)	555	34
Fish & Bird food	110	7
Total	1,635	100

Source: BIS Shrapnel estimates

Grocery sales of pet food (\$ million)

Type	1994	1998	% change
Dog food:			
• Canned	285	297.5	4.4
• Packet (dry)	148	192.3	29.9
Total	433	489.8	13.1
Cat food			
• Canned	207	228.5	10.4
• Packet (dry)	71	84.7	19.3
Total	278	313.2	12.7
Bird seed	39	39.3	0.8

Source: Retail World, BIS Shrapnel estimates

Grocery sales of pet food (tones)

Type	1994	1998	% change
Dog food:			
• Canned	175	162	-7.4
• Packet (dry)	86	93	8.1
Total	261	255	-2.3
Cat food			
• Canned	92	86	-6.5
• Packet (dry)	28	29	3.6
Total	120	115	-4.1

Source: Retail World, BIS Shrapnel estimates

Analysis of grocery pet food sales, 1998

Brand	Value (\$m)	% share	Volume ('000 tonnes)	% share
Canned dog food				
Uncle Ben's		67.0		63.6
Chubpak		8.7		7.6
Friskies		6.1		6.8
Bush's		4.2		4.6
House Brands		3.5		4.2
Generics		8.9		12.0
Other		1.6		1.2
Subtotal	297.5	100	162	100
Dry dog food				
Uncle Ben's		50.3		44.2
Friskies		24.5		25.1
Green's		8.4		8.0
Home Brands/generics		14.3		19.1
Others		2.5		3.6
Subtotal	153.4	100	89.0	100
Snacks & Treats				
Good-O		34.5		13.4
Lucky Dog		21.0		51.4
Go-Pet		10.1		3.4
Exelpet		8.5		3.4
Luv		3.9		9.4
Others		22.0		19.0
Subtotal	38.7	100	4.1	100
Canned cat food				
Uncle Ben's		59.9		60.4
Friskies		12.1		6.4
Safcol		7.9		7.1
Chubpak		4.0		3.4
Home Brand/generics		15.0		21.7
Other		1.1		1.0
Subtotal	228.5	100	86.3	100
Cat food – packet/dry				
Uncle Ben's		49.8		50.2
Friskies		39.4		41.7
Home Brand/generics		7.5		5.1
Other		3.3		3.0
Subtotal	84.7	100	28.8	100

Attachment 3a– A Current Affair Fact Sheet

A Current Affair – Web site transcript

Premium pet food: good enough to eat?

Pet food checklist

CHOICE: the pet food findings

Premium pet food: good enough to eat?

19 September 2002

Reporter: Ros Thomas

Most pet owners tend to rely on processed pet food. But do we really have any idea what's in the tin? ACA weighs up the difference between more expensive "premium" brands and cheaper alternatives.

While we are all prone to pampering our pets, new evidence — based on American animal feeding trials of Australian pet food brands — reveals that more expensive products are not necessarily superior.

According to CHOICE magazine's Gail Kennedy, we're lured in to buying pricier products by savvy marketing.

"We are hit with an enormous amount of marketing that tugs on the heartstrings ... that says if you don't buy this for your pet — the one you love — then you're not doing the right thing for them," she says.

The test results indicate that there is absolutely no proof that "premium" brands improve an animal's overall health or longevity.

But not everyone agrees.

Breeder Trish Nichols says she believes her animals do much better on the more expensive brands of food. And, despite the American findings, she's convinced the cheaper brands don't quite make the grade.

"I didn't get the performance when I was feeding a cheaper line of food ... It was as if I'd been giving my kids hamburgers every day ... They were just flat," she says.

Now, under the Trade Practices Act, pet food can't pretend to be anything it isn't. But there are still plenty of ways to fudge the language.

For instance, if a product boasts "beef", then it must be at least 25 percent beef. If beef is not the major ingredient, manufacturers can still call it the "beefiest" of "beef dinner" or "beef casserole". Should there be less than 25 percent beef but more than five percent, it can be referred to as "with beef", and if it just says "beef flavour", then it's never been anywhere near a cow!

Despite the findings, Sydney vet, Steven Van Mil, is also certain the more expensive pet foods do offer better nutrition. While he agrees that the big bags of premium biscuits can be fiendishly expensive, they have a higher energy content than the tins. And the family pet doesn't have to eat as much of it.

"I guess it's like buying a cheap meat pie; there could be anything in there ... If you're paying for more for food, you can be reasonably confident it is a better quality food," he says.

Currently, there are no national standards for Australian pet food. But if the brand you buy has passed the American tests, the words "complete and balanced nutrition" should be printed on the label.

"I guess the advice is not to feed table scraps and chopped up meats. Do go for a balanced food and do try to tailor those foods to the stage of the pet's life. But it doesn't have to be a premium food," says Steven.

In a nutshell:

For most healthy pets there's no evidence that "premium" pet foods improve overall health and longevity, compared to cheaper alternatives that meet appropriate standards.

Look for claims of a food being "complete and balanced".

Dry pet food has a higher energy content than wet food, so your pet doesn't need as much of it. And it's good for their health!

A Current Affair – Web site transcript

Pet food checklist

Premium pet food: good enough to eat?

CHOICE: the pet food findings
19 September 2002

In summary:

There's an internationally recognised standard for pet foods. It's awarded to foods that have successfully completed feeding trials developed by the Association of American Feed Control Officials (AAFCO). This means it has the right amount of nutrients and energy to keep your pet healthy. There's an enormous range in prices, even among the same categories of food. But price isn't a reliable guide to quality. Tinned food is generally a lot more expensive than dry food.

Most "special" foods cost more than other pet foods of the same type. Many claim to provide a healthier coat, smaller faecal volume and better-smelling breath, but for most healthy pets there's no evidence that they improve overall health and longevity, compared to cheaper foods that meet the AAFCO feeding trial standard.

Dry food has a higher energy content than wet food, so your pet doesn't need to eat as much of it.

For dental health and to keep their jaws working well, cats and dogs need a regular supply of foods that require chewing. But don't feed cooked bones that your pet can crunch up and swallow, as pieces of cooked bone can get stuck in the throat or cause bowel obstructions and perforations. Avoid chop bones (raw as well as cooked) as they splinter. Raw chicken wings are recommended for cleaning cats' and small dogs' teeth.

Attachment 3 b Choice reprint – Pet Food: Types of food

Choice - Pet food

Page 1 of 8

Food: Types of food

Pet food

You want the best for your pet. But do dogs and cats really need expensive, fancy food? What should they be eating?

Online 09/02

Article Contents

- » **Pet food**
- » **Our findings**
- » **How they test pet food**
- » **How 'special' claims measure up**
- » **CHOICE bottom line**
- » **What it says on the label**
- » **Pet food FAQ**
- » **Table - brands compared**

In Brief:

- For most healthy pets there's no evidence that 'premium' pet foods improve overall health and longevity, compared to cheaper foods that meet appropriate standards. Look for claims of a food being 'complete and balanced'.
- Dry pet food has a higher energy content than wet food, so your pet doesn't need to eat as much of it. And it's good for their dental health.

With pet food, "the best for your pet" now seems to mean "omegas for skin and coat health", "antioxidants for systemic health" or even "a new approach to health" altogether. If you took too much notice of some of those ads, you'd start thinking it was downright irresponsible to keep feeding your moggy from a carton or your pooch from a tin. But that's not true. Many of the ordinary pet foods available in supermarkets have been tested to a high standard to ensure they provide a complete and balanced diet. You don't generally need fancy foods to keep your cat or dog healthy, or to pay the high prices asked for premium foods sold through pet shops and vet clinics.

Our findings

We took a close look at food available for cats and dogs. Among our findings:

- There's an **internationally recognised 'standard'** for pet foods, which you can rely on. It's awarded to foods that have successfully completed feeding trials developed by the Association of American Feed Control Officials (AAFCO). This means it has the right amount of nutrients and energy to keep your pet healthy.
- There's an **enormous range in prices**, even among the same categories of food. But price isn't a reliable guide to quality. As our table shows, some AAFCO-standard foods are relatively cheap. Tinned food is a lot more expensive than dry food.
- Most **'special' foods cost more** than other pet foods of the same type. Among their claims are to provide a healthier coat, smaller faecal volume and better-smelling breath, but for most healthy pets there's **no evidence that they improve overall health** and longevity, compared to cheaper foods that meet the AAFCO feeding trial standard.
- **Dry food has a higher energy content** than wet food, so your pet doesn't need to eat as much of it.
- For dental health and to keep their jaws working well, cats and dogs need a **regular supply of foods that require chewing**. But **don't feed cooked bones** that your pet can crunch up and swallow, as pieces of cooked bone can get stuck in the throat or cause bowel obstructions and perforations. Avoid chop bones

(raw as well as cooked) — they splinter. Raw chicken wings are recommended for cleaning cats' and small dogs' teeth.

How they test pet food

There's only one really reliable way to test animal food, and that's with lengthy feeding trials. AAFCO trials last six months for adult 'maintenance' products, during which time the animals are given only the test food and water, and their health and progress are monitored for signs of nutrition-related disease.

Foods that pass this test can carry a label claim along the lines of: "Animal feeding tests using AAFCO procedures substantiate that Product X provides complete and balanced nutrition."

Unfortunately, some foods that have met AAFCO feeding trial requirements don't advertise the fact on the **label**. It'd be much more useful if they did. Look for the words 'complete and balanced' if there's no mention of AAFCO.

The US National Academy of Sciences' National Research Council (NRC) and AAFCO also set food formulation standards. These are useful, but don't provide the same guarantee, as they're based on a chemical analysis, not actual feeding trials.

How 'special' claims measure up

We've all seen the ads. Beautiful, glossy-coated, energetic dogs bounding through the fields, winning prizes, not quite co-operating (in the most endearing way) for the vet. But it's not just the food that makes these animals such winners. They've been bred and trained that way too.

Despite the advertising claims, there's **little evidence** that premium foods will be more beneficial than other 'complete and balanced' foods for an already healthy animal.

As one animal nutrition expert told us, "There's no convincing evidence that premium diets improve overall health or longevity. It's only when a pet is under physical or emotional stress or is suffering from a health problem that a premium diet becomes clearly beneficial to health."

So chose a link to see exactly how that 'special' claim measures up.

Real meat

Healthy skin and hair

Joint disorders

Antioxidants

Fibre

Dental health

Anti-furball

- **Real meat.** Premium brands are more likely to claim they use 'real' muscle meat, poultry or seafood as their main ingredient. Some supermarket brands use less muscle meat and make up the balance with meat by-products like organs, blood and bones, which are also highly nutritious.

Having bigger chunks of real meat will probably make the food look more appetising to you, but it'll mean little to your pet. A higher proportion of muscle meat and other high-quality ingredients, though, can lead to a reduction in faecal volume. The use of these ingredients means the food is digested more easily and therefore there's less waste. However, many supermarket brands use muscle meat too.

- **Healthy skin and hair.** Omega-3 fatty acids are all the rage for shiny skin and coat. The fact is, any cat or dog getting good-quality, complete and balanced nutrition should have healthy skin and hair. However, some veterinary studies suggest omega-3s may have a positive effect if your pet has inflammatory skin disease (dermatitis), which causes itching. Any difference you'll notice may take several months.

Even ordinary supermarket products like **FRISKIES Go Cat** make omega-3 claims, so you don't necessarily need to pay more for premium products. But it's up to the manufacturers how much they put into the food, so products will vary.

- **Joint disorders.** Manufacturers have come up with products containing glucosamine, chondroitin sulphate and green-lipped mussels to help prevent canine joint disorders and other aches and pains. Again, claims are sometimes vague and often anecdotal. However, there's growing evidence that some of these products do have an effect on joint disease. Product formulations aren't standardised so it's difficult to evaluate them. Animal nutritionists and regulatory authorities need to reach an agreement about optimal levels that are beneficial in pet foods.
- **Antioxidants.** There's little evidence yet that healthy pets require additional antioxidants, like vitamin C or E or beta-carotene, over and above those already available in complete and balanced pet foods. Synthetic antioxidants in pet foods, like BHA and ethoxyquin, aren't there for the animal's health, but to ensure the food stays shelf-stable and doesn't go rancid.
- **Fibre. ROYAL CANIN Indoor 27** is "designed" for "adult cats living entirely indoors". It contains fibre, claimed to "help reduce stool odour by stimulating beneficial intestinal flora and absorbing toxins". It's a similar claim to those for probiotic yoghurt and the like "stimulating beneficial intestinal flora" in humans, but there's no definitive evidence about their role in pet food.
- **Dental health.** Animals keep their teeth clean and gums healthy by chewing on dry foods, raw bones and chewable toys. The abrasive action from the chewing scrapes tartar off the teeth. Some foods — such as **WHISKAS with Vita-Bites** — have added calcium to "promote healthy teeth", but it's not necessary. All 'complete and balanced' products have adequate calcium.
- **Anti-furball products.** Cats swallow their own fur all the time, and most of it's digested and passed naturally. But if they swallow too much or it collects in the stomach and oesophagus, it can form a furball, which may be regurgitated. Many supermarket and premium products are anti-furball formulations — increased fibre is supposed to pass the hair gently through the digestive system and stop furballs forming. There's no agreed definition for a furball formula, but if these products seem to work for your cat, it's fine to keep using them. Make sure your cat's diet is based on 'complete and balanced' products overall.

CHOICE bottom line

- At least 70% of what dogs and cats eat should be 'complete and balanced' **products that have passed AAFCO feeding trials**. If you want to give them home-made food, get advice from your vet first (see **Pet food FAQ** for more).
- A healthy dog will be **alert, energetic, with a good coat** and not too thin or fat. It's similar for cats, although alertness and energy can sometimes be hard to judge! If this description doesn't fit your pet, they may not be getting a complete and balanced diet.
- **Commercial dry food is a good base**, as most products are complete and balanced, and it's cheaper than tinned food. Make sure there's a ready supply of clean drinking water as well.
- **Many tinned foods are also complete**, although to keep the teeth clean and the jaw working well it's important to supplement these with dry foods, a raw bone, tough meat or a chewable toy several times a week.
- **If you use dog rolls, choose AAFCO-tested ones**. Our sister organisation in New Zealand took a close look at the market and found few that had been AAFCO-tested by independent feeding trials.
- If your pet is unwell or develops skin or gastrointestinal problems, get advice from your vet.

What it says on the label

Under the Trade Practices Act, pet foods, like any other product, can't make misleading or untrue claims. You can't call a dog roll 'beef' if it doesn't have beef in it.

But what if it has some beef — just not very much? There are no government regulatory guidelines, but the Pet Food Industry Association of Australia's (PFIAA) code of practice is based on best practice and incorporates standards for labelling, marketing, nutrition design and claims.

For example, the code stipulates that a 'complete and balanced' or 'nutritionally complete' pet food must meet the minimum recommended nutritive requirements for that species. Pet snacks or treats should be labelled 'complementary pet food', as they aren't nutritionally complete.

A pet food may not be labelled 'beef' unless it contains at least 25% beef and beef is the major ingredient. If beef isn't the main ingredient but still makes up 25% or more of the meat, and the product is the 'beefiest' in the range, it can be labelled 'beef dinner' or 'beef casserole'. If more than 5% but less than 25% of the food is beef, the words 'with beef' can be used — as in 'dog stew with beef'. But be warned: if it just says 'beef flavour', the product is likely to contain hardly any beef at all.

Ingredients must be listed in descending order by weight — so the first ingredient is the most plentiful.

No Australian standard

There's no national standard for processed tinned or dry pet food. If it's imported it has to comply with Australian Quarantine and Inspection Service (AQIS) import regulations and must be certified to come from disease-free animals that were inspected before and after slaughter.

For processed pet food made in Australia some state regulations apply, otherwise the industry is largely self-regulated. Major manufacturers are members of PFIAA and have to comply with its code of conduct and AAFCO standards.

Fresh and frozen pet meat is regulated by the state and territories' agriculture portfolios or meat authorities. The Primary Industry Ministerial Council's Meat Standards Committee is working on establishing a standard for such pet meat.

Pet food FAQ

Should cats and dogs eat the same food?

Do younger and older pets need special foods?

Is milk bad for pets?

Is a home-made diet better than a commercial one?

Should pets eat a variety of foods?

Why do dogs and cats eat grass?

Is there any risk of BSE with pet food?

Should pets be fed only once a day?

Does dry cat food cause bladder problems?

- **Should cats and dogs eat the same food?**

No. Dogs are omnivores, while cats are carnivores and need the higher levels of protein, fat, niacin and arachidonic acid provided by meat. They can't use vegetable sources to make vitamin A as dogs do, so must get it from meat. They're also sensitive to thiamin, potassium and arginine deficiencies.

Taurine is essential for cats and a deficiency can cause heart disease and blindness. There's sufficient taurine in most cat foods, so the 'added taurine' claimed by some is not necessarily advantageous.

The protein content of cat food is unnecessarily high for dogs.

- **Do younger and older pets need special foods?**

In dietary terms, AAFCO recognises that animals go through three life stages. The first is growth: kittens and puppies have extra nutrient needs and a special food is recommended. The second is when a mother is nursing: special foods are recommended for a lactating cat or dog.

The third stage is simply adulthood, during which animals need to maintain their 'complete and balanced' nutrient intake. In most cases, older pets don't need special foods because they've no consistent nutrition peculiarities — though some may need to lose weight and others to put it on.

- **Is milk bad for pets?**

Cats and dogs are a bit like us: some like milk and some don't, some can tolerate it and some can't. If your pet likes drinking milk, that's fine. A pet that can't tolerate milk will usually suffer from diarrhoea. Special reduced-lactose cat milks are available, but they're expensive and usually unnecessary.

- **Is a home-made diet better than a commercial one?**

If your pet is eating 'complete and balanced' foods, tested by an AAFCO trial, it'd be hard to improve on their diet with home-made substitutes. However, if you have the time to prepare a home-made diet for your pet, ask your vet for advice on what to include. Table scraps and other leftovers shouldn't make up more than 30% of your pet's dietary intake — preferably less.

- **Should pets eat a variety of foods?**

Animals are mostly concerned about meeting their energy needs rather than variety. But if you do feed your pet the same thing every day, you may find it reluctant to eat different foods, so a variety may be the best approach.

- **Why do dogs and cats eat grass?**

It's believed some cats and dogs chew grass when they feel nauseous. Others may do it out of boredom or they may just like it. Eating grass isn't harmful and is no cause for alarm.

- **Is there any risk of BSE with pet food?**

There shouldn't be. BSE in animals hasn't been detected in Australia. Pet food products must meet stringent import health standards or comply with state or territory legislation that applies to pet food production in Australia.

Pet food may only be imported from approved manufacturing plants, and only from countries or zones that are classified in the International Animal Health Code as being BSE-free or BSE provisionally free (no cases have been reported, but no risk analysis has been undertaken).

If pet food is imported from countries or zones classified as having a minimal BSE risk, the animals must have undergone an ante- and post-mortem inspection and no specific risk material may be included in the food.

There's no evidence that dogs can contract BSE. Cats are susceptible to a feline form of the disease (FSE), but there haven't been any cases reported in recent years.

- **Should pets be fed only once a day?**

Most cats can eat when they like, but if you leave food out for dogs or greedy cats, they're likely to overeat.

- Growing dogs should be allowed to eat until they're full in a short time period two or three times a day. If there's any sign of obesity in a pup it's important to reduce its food intake: a fat puppy isn't a healthy puppy. As they get older the eating time doesn't matter as much as the quantity.
- Working, pregnant or lactating dogs and very small breeds can't usually eat enough at one sitting to meet their energy needs and should be fed smaller amounts more often.
- Kittens and pregnant or lactating cats need to be fed at frequent intervals.
- Once a day is fine for other cats and dogs.

- Does dry cat food cause bladder problems?

Cat biscuits used to, but manufacturers have altered the formulation and the problem has reduced. Cats fed on well-formulated dry food don't run a higher risk of getting bladder stones. Give them access to clean drinking water at all times.

Table - brands compared

The table lists the market-leading dog and cat foods plus some other standard formulations for adults that make special claims for adult pet maintenance.

Brand/Product (in alphabetical order within groups)	Type of Food	AAFCO Trialed	Size bought (g)	Price per kg (\$)	Energy content (cal/kg)	Cost per year (\$)
Market Leaders: dog food						
CHUM	Tinned	3	700	1.61	700	830
FRISKIES Lucky Dog	Dry	3	3000	1.76	(D)	(D)
PEDIGREE Meaty Bites	Dry	3	3000	1.66	3400	210
PEDIGREE Pal	Tinned	3	700	1.97	750	970
Dog food with special claims						
EUKANUBA	Dry	3	3000	7.32	4332	740
HILL'S SCIENCE DIET	Dry	3	4500	7.99	3841	910
HILL'S SCIENCE DIET	Tinned	3	418	5.26	975	2360
IAMS	Dry	3	3630	5.22	4060	563
PEDIGREE Advance	Dry	3	3000	6.98	4000	760
PEDIGREE Principal	Dry	3	2000	3.71	3710	440
PURINA One	Dry	3	3000	3.43	4263	350
PURINA Pro Plan	Dry	3	1500	9.00	4179	940
ROYAL CANIN	Dry	3	1000	8.95	3900	1010
SUPERCOAT	Dry	3	1500	2.04	3550	250
SUPERCOAT	Tinned	(A)	700	2.86	1900 – 2400 (E)	520 – 660 (E)
Market leaders: cat food						
DINE	Tinned	(B)	400	3.23	800	440
FRISKIES Go-Cat	Dry	3	375	3.60	3380	120
WHISKAS	Dry	3	1000	4.50	3650	140
WHISKAS Jellimeat	Tinned	3	400	2.88	750	420
Cat food with special claims						
EUKANUBA	Dry	3	3000	9.98	470	230
FRISKIES Vital Balance	Dry	3	1500	5.99	3740	180
HILL'S SCIENCE DIET	Dry	3	4500	8.43	4080	230
HILL'S SCIENCE DIET	Tinned	3	156	14.10	1093	1410
IAMS	Dry	3	3000	8.98	4483	220
IAMS	Tinned	3	396	9.09	1416	700
PURINA One	Dry	3	1500	5.33	4313	140
PURINA Pro Plan	Dry	3	1500	9.00	4281	230
ROYAL CANIN Fit 32	Dry	3	4000	8.56	3850	240
ROYAL CANIN Indoor 27	Dry	3	2000	11.98	3500	380
SUPERCOAT	Dry	3	500	4.40	3250	150
WHISKAS Advance	Dry	3	3000	8.32	3850	240
WHISKAS T.O.P.	Dry	3	500	7.00	3850	200
WHISKAS with Vita-Bites	Dry	(C)	400	4.38	3650	130

- (A) Hasn't been tested in AAFCO feeding trials, but meets AAFCO/NRC formulation standards (see How the test pet food).
- (B) Doesn't make any claims on the label. The manufacturer says it's assumed Dine is given as part of a "repertoire" of food.
- (C) Feeding trials are currently under way.
- (D) We couldn't calculate how much it costs per year because the manufacturer didn't tell us the product's energy content.
- (E) Depending on the variety.

AAFCO-trialled –

This product has been tested successfully in feeding trials undertaken by the Association of American Feed Control Officials (AAFCO). It has the right amount of nutrients and energy and can claim to be a 'complete and balanced' pet food. See How they test pet food for more on this.

Size bought/price per kg -

The price per kilogram is based on the price we paid (in a supermarket or pet care shop in Sydney) for the product in the size indicated — which isn't always the largest (and generally most economical) size available. Buying in bulk can usually lower your yearly feeding costs.

Energy content -

This is the metabolisable energy content in Calories per kilogram (Cal/kg).

Cost per year -

Prices (and pets) can vary considerably, so our cost per year is only a comparative guide, not an absolute. It's based on the unit price and energy content mentioned, and on the daily calorie requirements of a 20 kg dog or a 5 kg cat. Nutritional guidelines vary according to a pet's age, size, body weight and activity. The cost is rounded to the nearest \$10.

This article last reviewed September 2002

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Attachment 4 Hill and Knowlton submission

To: Trevor Cook
PacALLIANCE (Australia) Pty Ltd

Date: 23 September 2002

Re: Submission to Kangaroo Industry Association

Background

Since its appearance on Australian supermarket shelves some eight years ago, kangaroo meat has slowly gained acceptance by consumers as a niche lean game meat. During the introductory phase there was considerable negative lobbying by special interest animal and environment groups which the initial marketing task very difficult.

Although some supermarkets and pet shops sell fresh and tinned kangaroo meat as pet food, it is frequently not labelled as such or widely recognised.

Some of Australia's largest pet food manufacturers are strongly resistant to the use of kangaroo meat in pet food for fear of consumer and special interest group backlash. For many city-based consumers and community opinion leaders the kangaroo is "Skippy", a national icon that is sacred.

Among veterinarians there are some quality control concerns about fresh kangaroo meat that is currently on sale. These concerns centre on the potential for the meat to carry diseases such as Toxoplasma and storage and handling methods. For example if fresh meat is frozen and stored for long periods, the thiamine content declines dramatically and this can be very harmful to a cat's health.

Economically, there has never been a stronger case for the commercial harvesting of kangaroos. As a result of the drought and culling quotas, kangaroo numbers have reached nearly plague proportions in some regions competing with sheep and cattle for scarce vegetation. Commercial harvesting could bring much needed revenue to farmers struggling in the current conditions.

However, feedback from pet food processors, veterinarians, key retailers and recent media coverage indicates very clearly that a strong public relations program is needed before the wider use of kangaroo meat in pet food would meet community acceptance.

Like many other food industry groups, the kangaroo meat industry would need to take a long term approach to reposition its product over the next two to five years in order to win over sceptics, producers and consumers.

And there will be some groups ("Rover should not eat Skippy") who would not ever accept that kangaroo meat should be used in pet food. The aim of the public relations program would be to reduce their number and minimise their influence on

consumers by building the case with other interest groups, opinion leaders and the media.

Examples of successful long term repositioning programs in the face of very strong opposition in the Australian food industry include sugar (from “white death” to energy food), pork (from fatty unhealthy special occasion meat to lean every day white meat) and red meat (from “heart attack” to essential iron-rich energy food).

Hill and Knowlton is pleased to outline the following strategic approach to developing a public relations program to gain acceptance of kangaroo meat in pet food.

Strategic Approach

Based on our extensively experience with sensitive public relations programs, Hill and Knowlton would recommend a four step process to develop Kangaroo Meat Industry’s pet food campaign as follows:

1. Audit of key opinion leaders
2. Consumer research
3. Strategic public relations plan
4. Campaign roll-out

1. Audit of key opinion leaders

Who are the individuals, groups and institutions that could help to turn public opinion around on kangaroo harvesting for pet food? The first stage of the public relations planning process would be to identify all of the relevant opinion leaders and assess their current position on the issue.

2. Consumer research

Parallel to the investigation of key opinion leaders, Hill and Knowlton recommends the commissioning of consumer focus groups and opinion research if this is not already in place. The focus groups would explore the range and depth of feelings among pet owners and consumers about kangaroo meat in pet food.

Public opinion polling research would test community attitudes on an agreed set of questions related to kangaroo meat in pet food and act as a benchmark against which to measure success of the public relations campaign.

3. Strategic public relations plan

Using results of the opinion leader audit and the consumer research, Hill and Knowlton would develop a long term strategic public relations aimed at building acceptance of kangaroo meat as a viable ingredient in pet food.

The strategic communications plan would include the following campaign elements:

- a. Key Messages – promoting the case
- b. Key Issues – which may arise
- c. Recommended Spokespeople – to deliver and support the Industry's stance
- d. Opinion Leader program – reaching and influencing the influencers. Key to influencing consumers who are pet-owners will be leading veterinarians, vet nurses, animal breeders and animal protection groups. The Industry will have to demonstrate the measures in place to ensure consistently high standards in meat quality and humane harvesting.
- e. Special Interest Group Contact program – reaching those groups that can support the Industry's case or who would have an influence on the debate. This would include;
 - i. Government Departments and Agencies,
 - ii. Government Ministerial offices,
 - iii. Animal protection groups (eg RSPCA),
 - iv. Industry groups – eg NFF,
 - v. Professional groups – eg Veterinary Associations, Veterinary Nurses Association, Pet Breeders, Animal Dieticians
 - vi. Leading academics and think tanks – eg. ABARE
- f. Research – to track consumer attitudes and for release to the media
- g. Core Campaign Elements – eg. Electronic newsletters, position papers, secure web site, media briefings, media interviews, government relations, information kits, frequently asked questions and answers, myths and misconceptions

4. Campaign Roll-out

Included in the strategic PR plan would be a detailed rollout plan including a range of options for tracking and measuring the campaign's success.

Amanda Little
Advisor
Hill & Knowlton, Sydney

During her 20 years in public relations, Amanda has counseled a wide range of major corporations, industry associations and professional service firms in developing and implementing effective and strategic issues management programs.

Amanda joined Hill and Knowlton in 1996 as Director of Public Affairs where she led the development and implementation of politically sensitive programs for public and private organisations. Amanda was Managing Director, Sydney from 1999 – 2002. She now works as an Adviser to H&K where she continues to work with clients leading strategy development and providing senior corporate counsel.

Key recent clients include Commonwealth Bank, James Hardie Industries, PacificCenturyCyberWorks, Avco Finance, BHP Steel and Walter Construction Group.

She spent many years helping organisations to develop their crisis plans and prepare executives to deal with the media. Clients she has worked with include Johnson & Johnson, BP Oil, Cadbury Schweppes, Broken Hill Proprietary Limited (BHP) and Du Pont.

Food industry clients include: Pork Promotion Council (repositioning pork with the “Other White Meat” and “Put Some Pork on Your Fork” campaigns), Becel margarine (Health Heart campaign), Laurent Perrier Champagne and Kellogg’s.

Formerly Director of Issues Management for Burson-Marsteller in Australia, based in Canberra, Amanda graduated from the University of Technology, Sydney as student of the year with a Bachelor of Arts (Communications) and completed a Master of Business Administration (MBA) at the same institution in 1991.

Amanda has lectured in public relations, communications strategy and issues management at Charles Sturt University, University of Canberra and the University of Technology, Sydney. She frequently speaks to industry associations and conferences on crisis communication and issues management.

**Trevor Hawkins,
Senior Advisor, Public Affairs
Sydney**

Trevor Hawkins is a senior consultant with Hill and Knowlton and has a diverse background in media, government relations and corporate and financial public relations.

He has specialised in issues and crisis management and media programs and has had extensive experience as a media trainer. Clients with whom he has worked in the past include the Commonwealth Bank, Chase Manhattan Bank, Nomura International, Cyprus Amax Minerals, Mitsubishi, ORIX Australia, Woolworths, Arnott's Ltd, the Malaysian Government, the International Rugby Board, the Federal Airports Corporation, Heinz Wattie's Australasia, Boral Ltd, Goodman Fielder, BellSouth, Mayne Nickless, the Association of Superannuation Funds of Australia and the Australian Finance Conference.

In 1988-89 Trevor worked for eight months handling issues management, marketing programs and media relations for the Government-owned Air Vanuatu during the political and constitutional crisis in that country and for which he was awarded the PRIA Golden Target Award for outstanding program of the year. The program was credited with increasing tourist bookings by 300% (over the previous year) in the first year of the program.

Prior to entering public relations, Trevor was a newspaper journalist for 26 years, but with experience in both radio and television. He spent 13 years in the Federal Parliamentary Press Gallery as Bureau Chief for both the Sun-News Pictorial and The Daily Telegraph. He was a Director of the National Press Club 1990-91 and 1991-92.

**Andrew Sloan
Senior Counsel,
Crisis & Issues Management**

Andrew joined Hill and Knowlton in Hong Kong in 1961 after a six-year career in journalism. In recent years in Sydney, Andrew's media and journalism background has been utilised in communication programs for pharmaceutical, food, manufacturing and retail industry clients and he has managed a number of crisis issues ranging from a Legionella outbreak, product contamination, to dangerously faulty pressure pack products and issues like the introduction of kangaroo meat to Franklins supermarket chain.

Andrew moved to Australia and joined Hill and Knowlton (then Eric White Associates) in late 1967 in Adelaide (four years) and was transferred to Melbourne (five years). Apart from corporate and marketing public relations programs for the AMP Society, Castrol and the SA Road Safety Council, he became the Adelaide correspondent for the house magazine, "Impulse", published by Winthrop Laboratories. During his time in Adelaide and Melbourne he researched and wrote articles on medical issues, developments and procedures each month for the magazine.

He returned to Hong Kong in 1976 to take over the management of public relations programs for The Chartered Bank, a leading Far East/Europe shipping consortium, a major brewery and the Australian Trade Commission. During this period, he also became responsible for the media relations and print production elements of an international program for the Indonesian Government's National Development Information Office, a role he continued to fill for 12 years in Australia after returning to Sydney in 1981.

In 1985 he managed a three-State visit to Australia by an Indonesian investment mission led by Industry Minister Hartarto; researched and produced a detailed investigation in 1987-88, into the Indonesian and Australian textile industries to identify opportunities for Indonesian textile exporters. He managed another three-State visit by a Government-sponsored and led Indonesian trade mission during 1988.

Crisis management and product recalls have become his speciality during the past 15 years, with projects ranging from tinned, packaged and fresh food and grocery products, computer software and hardware and manufactured and proprietary products on behalf of manufacturing and retail clients. He is a Senior Counsellor in the Crisis & Issues Management group, an Asia-Pacific regional Hill and Knowlton practice unit, located in Sydney.