



**CHOOSE HEALTH initiative**

WORLD CAT CONGRESS – March 2024

**ROYAL CANIN**  
a division of Mars Petcare

# WHO ARE WE?



**LAURELINE MALINEAU**

Global **Corporate** Communication



**ELODIE MOREL**

Global **Pet Professional** Ecosystem



**CHARLOTTE VENET**

Global **Brand** Communication



# OBJECTIVES

## PURPOSE

Challenging purebreed context  
Royal Canin's initiative présentation

## OUTPUT

Identify collaboration opportunities,  
Align on next steps





# THE ORIGIN OF THE INITIATIVE

- In the last decades, our world has faced major evolutions, globalization, and digitalization have both influenced the way we live, think and consume. Even our relationship with pets, cats and dogs can now be bought on digital marketplaces in one click, just like consumer goods, often based on aesthetic criteria.
- This encourages impulse buying and provides an ideal round for illegal trade. It is estimated that only 20% of the total demand is provided by registered breeders. The consequences of unethical breeding for pets can be dramatic, hence can be chosen based on images without the proper advice of the seller if they fit with their new family. Those cats can be sold unhealthy, a lack of social skills and are transported in appalling conditions.
- Another consequence is the increase of hyper types. This can cause major health issues such as Brachycephalic, obstructive airway syndrome, with respiratory or dental problems, but also significant issues during whelping.
- All over the world, headlines have started to react. Protests by NGO international events have been organized, as well as awareness campaigns in the media. Registered professionals suffer even more from unfair competition and constraining regulations, their images tarnished by unethical pet producers.
- The whole pet ecosystem is in crisis, and it needs a collective answer from us from you

# PET WELFARE AT RISK



Pet owners unaware of  
all ins and outs



Pets treated like a  
consumer good



Breeds and breeding are  
at risk



People more likely to buy a kitten on impulse  
than a new pair of shoes



- So basically, looking at these contexts we are currently facing, we came to the conclusion that there are several challenges. The first one is the fact that pet owners are not aware of the demand when they buy your pets, they don't know the difference between a good professional registered breeder and unethical nonregistered breeder.
- Also, they often buying on impulse, they don't take the time to get to know the breeder. And there is a study from the UK Kennel Club that show that it takes 20 minutes to buy a puppy on internet. So, it's less time to buy a pair of shoes, they don't have the time to think about if this is the breed that suits them, suits their lifestyle, their family, the environment they live in. There is no time to check about whether is a responsible breeder.

- What we see also is that because they are buying impulsively, pets are more and more considered consumer goods. And there are some challenges with their welfare. And finally, what we are afraid of is that there are more and more very constraining regulation that tried to do something about these challenges, but in fact some time are very constraining for the registered professional breeders but are not really tackling illegal trades.
- Finally, what we are afraid of is that there are more and more very constraining regulation that tried to do something about these challenges, but in fact some time are very constraining for the registered professional breeders but are not really tackling illegal trades. And what we see is that we have more and more breeds being done it especially in Europe, especially dogs, and we are afraid of that one day, maybe you will have to go to a zoo to see some of these breeds, because they will be disappearing. So that's why we felt we have to act, and to do something about it.



# PET OWNERS' EXPECTATIONS

## ABOUT THE MARKET RESEARCH

**4 countries** : UK, France, Denmark and Netherlands  
**1000** representative respondents by country  
**Pets** owner or non pet owner (cat or/and dog)  
**18** years old and more

## CONCERN ABOUT PETS WELLBEING



**HIGH**

Concern and increasing over the past years in the UK and FR. Pet owners are more concerned than non pet owner.

## AWARENESS OF BREEDING ISSUES



**50%**

Are aware of the issues affecting pets in the UK, DK and NL, while in FR, more than 50% people are not informed on the subject.

## ACTIONS TO CONDUCT



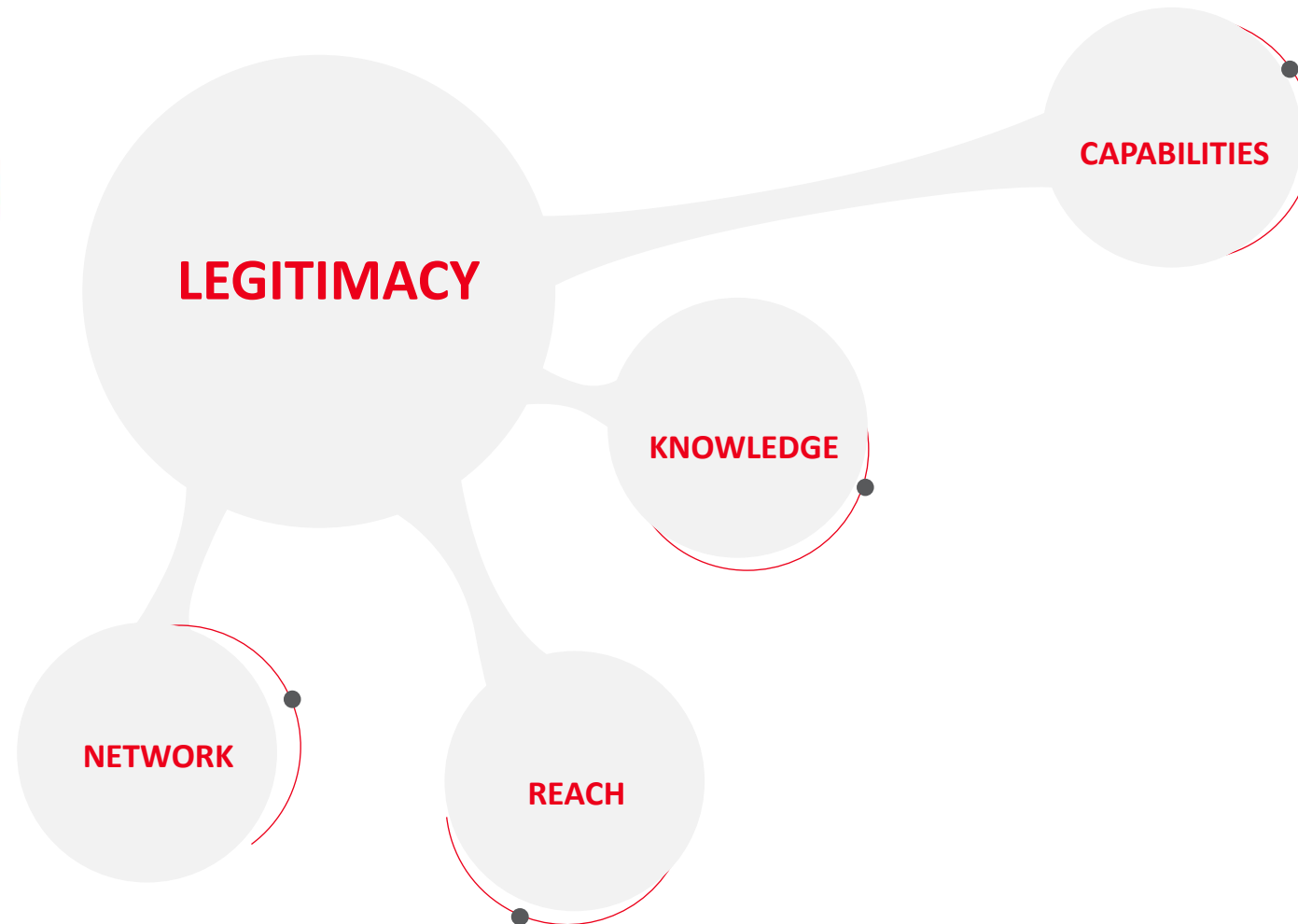
**2**  
**ACTIONS**

- **Support the fight** against illegal pet trade
- **Influence the legislation** to help regulate pets' breeding

- Because we want you to understand the awareness of people around these issues, we conducted a survey. So mostly in Europe, because we went to more events.
- So, we conducted a survey in France, Germany, UK, and Netherlands. And the result was that more than 50% of the people who were asked to answer the question, are not aware of these kinds of issues due to breeding.
- They also answered that they wanted us to support the fight of illegal trade.
- That is relations? So, we have a role to play as Royal Canin, to support you as our stakeholders?
- So basically, you may be wondering, why Volcana? Why are we wanting to do something about that. And first of all, we think that we have the least legitimacy because our purpose at Volcana is a better world for pets. And that's not making a better world for pets. When we see these challenges, and we don't do anything about it. That's the first thing. Second thing, we believe we have the right network to really do something. We have been contacted with breeders, with veterinarian with NGO, with governance, we also have the rich, we do some promotion, we have a great market coverage when we do this promotion, so we are able to reach a bigger audience.
- We also have the knowledge because in fact, when we study nutrition, we actually study the cat and the dog. So we know beyond nutrition, about the dog and the cats needs about their welfare. And finally, we also have the capabilities in house, we have people working in marketing in digital, we have veterinarian, we have different experts. And we really believe that all these could be put at the service of these criticals.

# HOW CAN WE SUPPORT YOU?

*A Better  World For Pets*



- So basically, you may be wondering, why Royal Canin? Why are we wanting to do something about that. And first of all, we think that we have the least legitimacy because our purpose at Royal Canin is a better world for pets. And that's not making a better world for pets. When we see these challenges, and we don't do anything about it. That's the first thing.
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- And finally, we also have the capabilities in house, we have people working in marketing in digital, we have veterinarian, we have different experts. And we really believe that all these could be put at the service of these criticals.
- What we started to do is to define what could be our ambition with this project and what we like to achieve with quite a long term view because we will take time. So what we would like to do by 2030 is to really significantly decline, illegal trade and extreme grading, which are the two pillars we would like to tackle in this project. Why we want to do that really to improve health and well beings, okay, send those worldwide, and as a consequences. Also, if we provide pet water helps your puppies and Keaton, we hope that we will have in the future less pet homelessness. And how do we expect to do that by promoting first responsible breeding and responsible pet ownership?





# THE INITIATIVE

# AMBITION



**BY 2030** WE WANT TO SIGNIFICANTLY DECLINE ILLEGAL TRADE  
AND EXTREME BREEDING



**IN ORDER TO** IMPROVE THE HEALTH & WELLBEING FOR DOGS  
AND CATS WORLDWIDE AND DECREASE PET HOMELESSNESS



**BY** PROMOTING RESPONSIBLE PET OWNERSHIP AND HEALTHY  
BREEDING

- What we started to do is to define what could be our ambition with this project and what we like to achieve with quite a long-term view because we will take time.
- So, what we would like to do by 2030 is to significantly decrease the illegal trade and extreme breeding, which are the two pillars we would like to tackle in this project.
- We want to do that to improve health and well being, okay, send those worldwide, and consequently, we provide to pet owners' healthier puppies and kittens, we hope that there will be in the future less pet homelessness.
- And how do we expect to do that by first promoting responsible breeding and responsible pet ownership?
- To give you a better idea of what is the position of ICANN on this topic, we ask the sponsor of DCCT, which is the president of Royal Canin, so it's in good hands. We have a wonderful video, so you better understand what we want to achieve with this initiative.

# OUR MANIFESTO

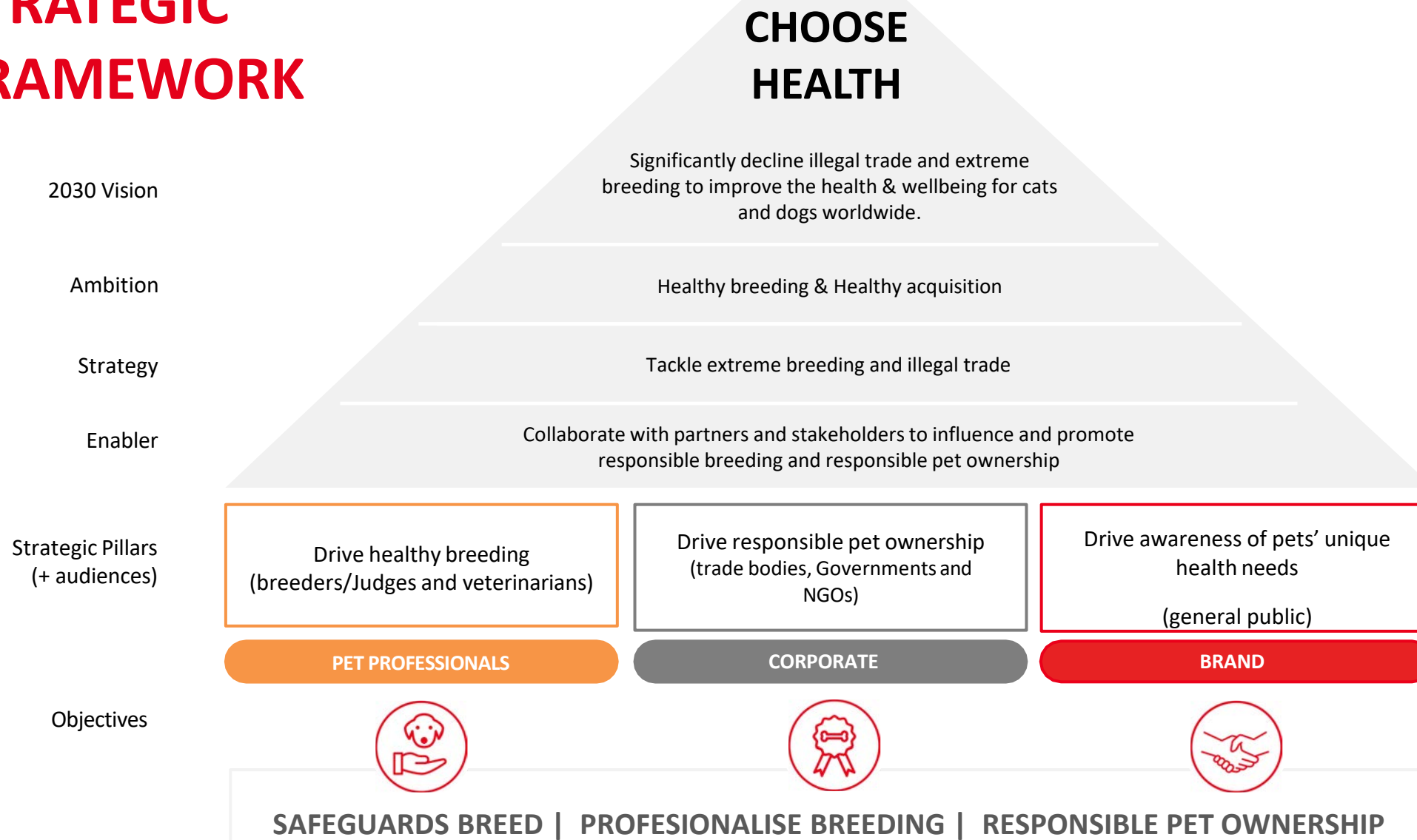




- At Royal Canin, we are committed to our purpose, a better world for cats. A world where best health and wellbeing is a priority. And the rights are respected. Science enables healthy pedigrees and breeder status helps to nurture great pets that are the finest ambassadors of their breed a world where shows real world health with diversity and unique abilities are celebrating and everyone recognizes the benefits the bring into our lives.
- We are dedicated to help make this world a reality. Today, globalization and digitalization pets are just one click away. Illegal trade is on the rise. breeding and selling regulations vary from market to market. Driven by trends.
- Cats and Dogs are changing shape before our eyes, and it can be to the detriment of their health, and well being. As CEO of Royal Canin, I know how passionate my team is about making change, but we can't do it alone. Let's stand together as one, from pet owners and breeders to veterinarians, retailers, banks, institutions, NGOs, and governments.

- We all have an important part to play promoting responsible breeding, responsible adoption, responsible pet ownership, putting character and healthy physical traits first, when choosing breeding of new pets Certified Professional breeders to give them the recognition, they deserve harmonizing the traceability and regulation, protecting real uniqueness.
- We are striving to achieve a new era of pet health and wellbeing. We've already started. But there is so much more we can and need to do. Let's create a better world for cats and dogs together.

# STRATEGIC FRAMEWORK



- So now that you understood that the initiative is focused on fighting against illegal trade and extreme breeding, we have the ambition mentioned by Elodie and the key enablers are you, the partners, we can't do it alone, and you can't change the walk alone. We all need to work together with the same goal. Why are we here today because it's a huge project. It's a project, it's a company project.
- That's why we have the pet professional that are not going to focus on driving health readings and energy for example, we have learning which is focused on raising awareness of bad health needs, and difference needs. And together, we are working on three pillars, we want to save breeds, we want to have responsible breeders, and we wanted to promote responsible veterinary practices. So, this is exactly what we want to do with this, we can't do it alone.
- We have defined a picture of success that led to what we would like to put in place and help us to achieve this ambition in this initiative is to try to push to have health status monitoring the pedigree, we also consider that shows must represent the best of the breed.



## OUR PICTURE OF SUCCESS

HEALTH TESTS  
MANDATORY FOR  
PEDIGREE

NO HYPERTYPE  
PETS IN SHOWS

HEALTH AS THE  
MAIN CRITERIA OF  
ACQUISITION

OFFICIAL AND  
HARMONIZED  
BREEDER  
CERTIFICATION



- So, when the when cats enter the show, it can a winner cannot be an imperfect. We would like to make a shift in the mindset of the pet owner because they are the one creating the demand. So, if the demand is only for the perfect ones, the breeder with imperfect cats is insulted. So, the shift we would like to achieve is to change the perception of what is a healthy cats put ats as the first criteria of acquisition. And not just the appearance of the cat
- That's why the complete names of the initiative shows health over looks. What we really would like to say to the people, when you acquire a pet, please look at the health even if you find it cute. Looks should not be the reason you buy a pet. And finally, we believe that breeders do not have the recognition they deserve.
- We are not making the difference between good breeder and bad breeder. We would like to create a certificate or to offer a bonus certificate to show the expertise of being a good breeder.



**MORE THAN A ROYAL CANIN INITIATIVE, A COALITION  
INVOLVING ALL THE STAKEHOLDERS OF THE PET ECOSYSTEM**

# A 360° PLAN TO INVOLVE THE WHOLE ECOSYSTEM

- Advocate for more traceability
- Advocate for breeder certification

## Government

- Amplify campaigns against illegal trade and extreme breeding

## NGO

- Train on RFGS
- Equip to talk to PO about BOAS/brachy breeds and responsible acquisition

## Pet owner

- Raise awareness on breed health sensitivities
- Educate on responsible acquisition
- Shift criteria for pet acquisition
- Sensitize young generation
- Promote responsible breeders & their expertise

## Vets

- Promote DNA test use
- Train on RFGS
- Educate on healthy breeding practices
- Profesionalize the activity

## Breeders

- Advocate for DNA testing and BOAS score to be part of pedigree
- Advocate for more health control in shows

## Pet Federations

## Judges

- Raise expertise with regards to extreme identification
- Advocate for health to be rewarded over aesthetics

## Breed clubs

- Advocate to shift breeders' role to be a guardian of breeds and for shows to be a place to celebrate health

## Media

- Shift trend for healthy pets
- Advocate for more regulations on online advertising of pets



- So, we were saying that we need to work together and in fact it's very important because as you saw with the ambition, we are aiming in parallel, to have some objective with the different people of the ecosystem. So, with the breeders with the judges, with the government with the pet owner, and that is why we want really to work together. This is why we are here today. But we've also been presenting this initiative to many stakeholders we started with the dog world, but we've we have also presented already to the WCA, that Leslie's is presenting.
- And you can see on the screen that this is the ecosystem.
- Basically, for each of the audience of the ecosystem, we have planned some action. So, let's take some examples. Without going into too much detail because this is quite a packed. We want for example, for the judge to raise expertise regarding extreme identification. We want to advocate for health to be rewarded over aesthetic. Elodie was talking about that and how critical this is as they are the one that are defining the future breeders.

- Talking about my area with government, we want to advocate for more traceability. We have started to do that in Europe. We want to advocate for breeder's certification with NGO, we support them and amplify their campaign, we want to shift the criteria of acquisition.
- We want that health is the first criteria of acquisition. We want to raise awareness on breed sensitivities, educate on what is responsible acquisition, we also want to sensitise the young generation because we believe that if you want to shift the behavior, we must start with a young generation.
- We want to promote what is responsible breeders, we want to show what is behind good breeders, all the work all the expertise or the passion that is behind the good breeders so that when they see two ads, and there is one, similar pictures, but one is a more expensive price, they understand why it's more expensive and what is behind this price. And we also want to work with the media. And that is key as well, because media is what is setting the trends.



# **2023 ACHIEVEMENTS AND 2024 ACTION PLAN**

# 2023 ACTIONS



## SAFEGUARD BREEDS

EDUCATE ON **RFGS AND BOAS** AT WSAVA 2023 + EDUCATIONAL FLYER

PROMOTE **DNA TESTING** AT SHOWS

ADVOCATED THROUGH FEDIAF FOR MORE **TRACEABILITY** IN EUROPE

**PARTICIPATE IN ICEC DOGS** WORKING GROUP + IN FCI COMMITTEE FOR DOG WELFARE AND HEALTH



## PROFESSIONALIZE BREEDING

DEDICATE OUR **PRO EXPERT FORUM** EVENT TO PET HEALTH & WELLBEING

**EDUCATIONAL TOOLS** DEVELOPMENT (EDITIONS & DIGITAL TRAININGS)

PROFESSIONALIZE **ACTIVITY MANAGEMENT** (Royal Start)



## PROMOTE RESPONSIBLE PET OWNERSHIP

DEVELOPMENT OF 8 MORPHISM OF **HYPERTYPE** BREEDS (CATS & DOGS)

EDUCATE ON **BREED SENSITIVITIES** (BREED PAGES ON RC.COM)

PROMOTE **RESPONSIBLE ACQUISITION** (PR)

### BUILDING STRATEGY AND RALLY OUR PARTNERS

- And for the moment what they are showing is those extreme breeds and what Elodie was saying is that when the demand is for something, the offer will match the demand. So that is what we need to shift. So, as you see, it is key that if we want to have all this action with the different stakeholders that we work together, you, the vet association, the government's and this is also what we're talking, and this is why we are thrilled today to present this initiative.
- So, this initiative started last year, and we already have achieved some key steps. Mainly last year was about building the strategies to communicate with institutions and rally our partners in this initiative. We started with those, not because we prefer those, but simply because they were more exposed at that moment. And well, more crisis, especially Nordics, Netherlands, in Europe. So, we started with them because the emergency were there.
- What we chose some battles and some scientific battles. So, we chose the brachycephalic angle, and we started to educate, that responsible respiratory functional grading scheme to assess the brachycephalic obstructive syndrome. We had a booth with educational content with master classes with Jane Lago, a veterinarian in the University of Cambridge, who is recognised in the field of course, and we distributed educational flyers.

- We also took the angle of DNA testing, because we do believe that this is something in terms of tests that could help to improve health of puppy and kitten.
- We tried to communicate on what is available in terms of change, testing. So, it's a total reduction in UK.
- For those of you that don't know PDF is a pet food industry in Europe for more traceability and as some may have seen, especially for the one coming from Europe, there is a new proposal for a new law for animal welfare that came in at the end of last year. This is something that Royal Canin influenced support for.
- We are also participating with the extreme conformation working group for the International Partnership for dog health, where we are defining what is extreme and also helping pet owners to identify what is an extreme dog. This is this is good because this is a group is not extreme, they are not against breed, they are not against fear, but they are for healthy animals



- We also have an annual event, which is the Import Export forum, where we invite breeders to join conferences about specific topics. Last year, we dedicated to the event completely on animal health and welfare. As we mentioned, we are also developing educational tools. We are doing is to promote E-learning programmes. We also did that in Cats already a free program, I know that Lucy, is working on developing new synaptic for cats.
- Just on the addition, you will see we give you two edition that we developed one especially on cats with more than 250 facts around cats. We are also developing a magazine where we are starting to talk about this..
- We are also trying to professionalise breeding, help breeders to manage better, we developed a digital tool, which is a management tool system called why is that?
- We developed eight morphism of eight different breeds, cats and dogs. We used artificial intelligence to visualise the standards, the first one are for specific breeds. For example, the Persian, what was the first version, what is the actual standard, because it is still are evolving, we're seeing and see, what is the bad example of this time now, which leads to I better, just to make sure that people can visually understand because we always say that the picture can speak more than 100 words. We started to develop a tweet; we would like to do it for as many breeds so people can visually understand.

- We are also working on a video where we go inside the puppy or kitten and explain exactly behind, for example, the sad face, the respiratory problem, the hair. We also have some specific information about breeds and breed sensitivities.
- We explain what are the specifics of each breed, the character of the breed, what potential issues the breed can have. So, people are aware before they buy a specific breed, they will know what may happen in the future where they buy it
- We are promoting responsible acquisition, in 2023, we did some press releases about responsible acquisition, how to acquire responsibly, how to select a good breeders, what things they must check.

# 2024 PLAN



## SAFEGUARD BREEDS

PROMOTE **BOAS/RFGS** AT EVENTS

PROMOTE **DNA TESTING** AT EVENTS

SUPPORT EUROPEAN **ANIMAL WELFARE  
REVISION LAW PROPOSAL**



## PROFESSIONALIZE BREEDING

EQUIP **JUDGES** TO FURTHER INFLUENCE  
HEALTH THROUGH SHOWS

STRENGTHEN WELFARE DISCUSSION &  
TOOLS AT **CAT AND DOG SHOWS**

VIDEO TO HIGHLIGHT **RESPONSIBLE  
BREEDERS**



## PROMOTE RESPONSIBLE PET OWNERSHIP

RAISE GENERAL **PUBLIC AWARENESS** ON  
RESPONSIBLE BREEDING AND PET  
OWNERSHIP

ADD **BOAS SCORE** IN OUR  
COMMUNICATION

**EDUCATIONAL TOOLS** DEVELOPMENT  
(BREED MATCH TOOL)

## CONTINUE TO ENGAGE OUR ECOSYSTEM

- What we are doing in 2024.
- No big changes, we will continue to engage your ecosystem to rally the cat world initiative. That's why we are here today. To promote DNA testing during our events.
- We are supporting the European animal welfare proposal. It's something that we carry on doing and we have some contact with animal welfare units in the European Commission. We also have some contacts through PDF with the European Commission trying to advocate and influence to the proposal to be adopted as soon as possible.
- We do believe that judges have a critical role to play because they are the one recognising the winners as the best of the breed. We want to strengthen the conversation, about cat and dog shows. Royal Canin are in contact with many organisations and dealing with a lot of shows.

- We are part of these shows, we want to also act and start the discussion with the organisations to ensure that there is a check before the events and that the cats and dogs are healthy.
- We are developing a lot of tools around that. We welcome a video called responsible breeders, it is not a classic video, interviewing only one breeder and what we what they are doing. We would like to make a coalition gathering different Federation, cats, dogs and us working together, explaining what is the role of the breeder and what really is proficient is expertise.
- On promoting responsible pet ownership side, we want to carry on raising awareness on responsible breeding responsible pet ownership. As I was mentioning before, we are planning to target the young generation.

- We also want to brachycephalic obstructive airway syndrome in our communication. The grading scheme is from zero to three, at which grades the dog and cats. We want to showcase only zero grades, which is 100%. To show to people, what it should look like?
- We also want to have some educational tools. E
- We are developing what we call the hidden match tool, people can go and answer questions. Depending on their answers, the top five breeds that match their lifestyle, that matches what they will give to the to the puppy and the kitten, so they are sure that they are choosing the perfect match.



# THANK YOU – TIME FOR DISCUSSION



## LAURELINE MALINEAU

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