



Pet Food Market Trends May 2020



**For more information, please contact
Tree Top Ingredients at
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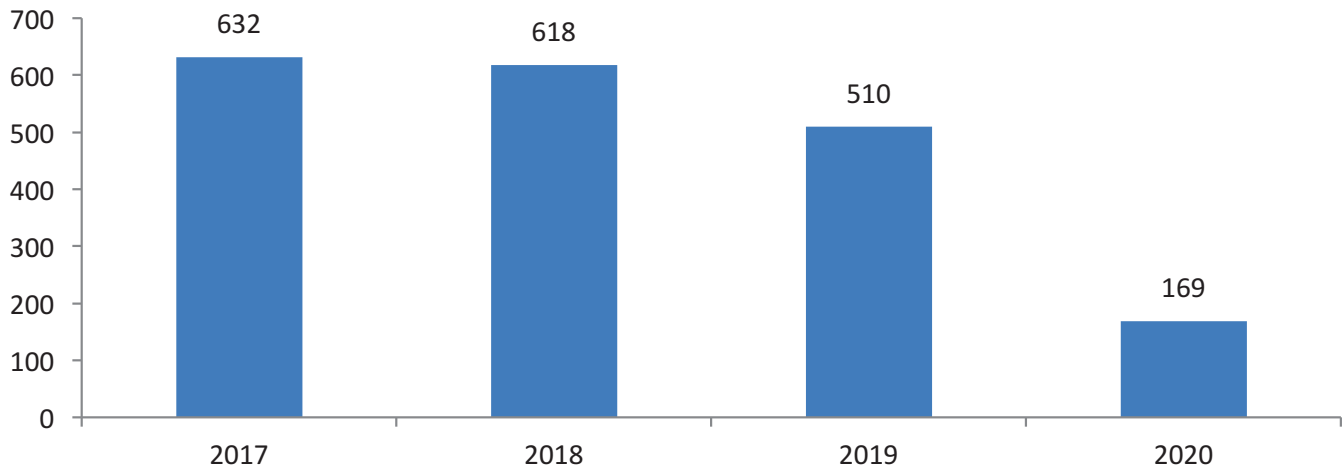
Source:
Natalie Tarchick, Mintel, Contributing Editor
Mintel Global New Products Database (GNPD)



Pet Food May 2020

Tree Top is proud to partner with Mintel to provide our customers with the latest research and new product introductions. Mintel is the world's leading market intelligence agency offering perspectives, purchasing data and insights.

US: # of Pet Food launches, Jan - April YTD



Natural ingredients are the key to success with younger pet owners

The difference in interest in all natural foods between younger and older pet owners is significant, and in terms of organic ingredients, the difference is even more pronounced with some 25% of pet owners aged 18-34 rating organic ingredients as a significant purchase factor, compared to just 9% of owners aged over-55.

In the 12 months to February 2020, the 'all natural' and organic product claims featured in some 15% and 3% of NPD in pet food and pet product NPD in North America respectively. They have seen steadily rising levels of NPD over the past five years.



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Pet Food with Fruit Ingredients



Dried Cranberries and Blueberries Lamb & Brown Rice Recipe Adult Dog Food

The product features real lamb as a first ingredient, omega-3 and -6 to support healthy joints and a shiny coat, and added fruits and vegetables that provide fiber to help support a healthy digestive tract (US).



Passionfruit

Passion Fruit and Banana Natural Flavor Pro-Relaxing Super Premium Biscuit

relaxing complex with passionfruit, chamomile extract and passiflora, said to contain relaxing and calming properties (US).



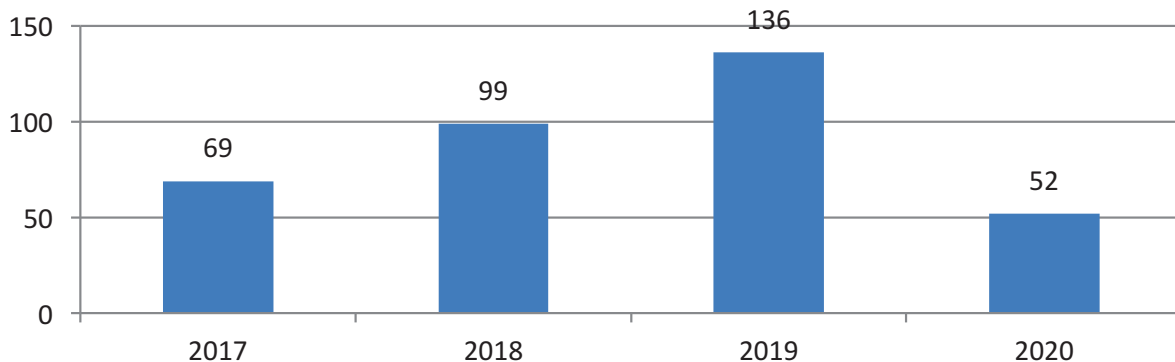
Cranberries

Pumpkin & Turkey Recipe Real Sticks Dog Treats

Plato Pet Treats Mini Thinkers Pumpkin & Turkey Recipe Real Sticks Dog Treats are said to have single source real meat protein and to be made with the world's finest and limited ingredients (US).

Probiotics as a claim in Pet Food has grown by +97% (2017-2019)

US: # of Pet Food Launches with a Probiotics Claim, Jan - April



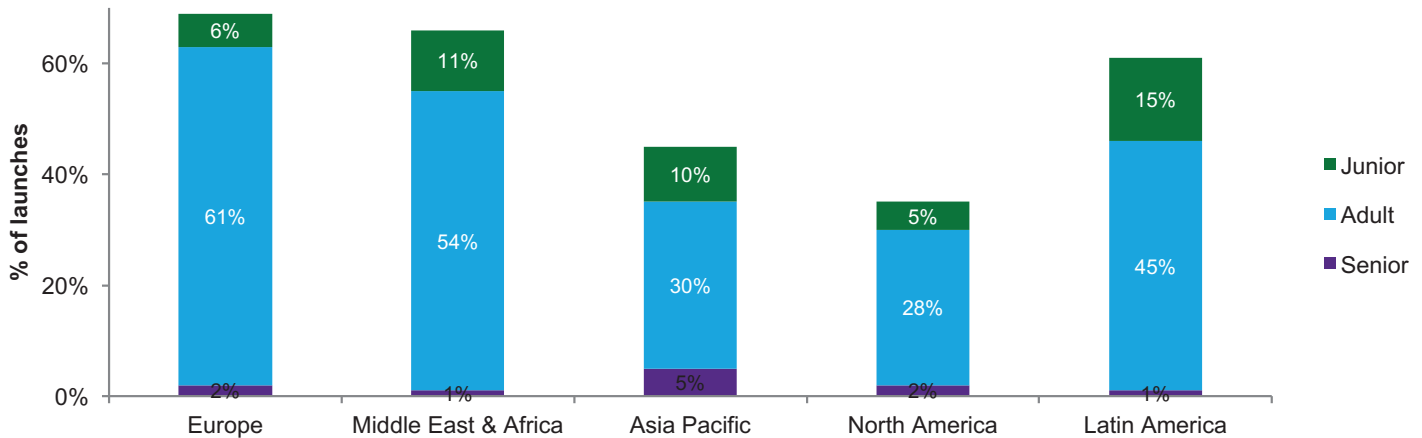


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In the US, some 35% of pet food NPD is positioned for specific age groups, significantly lower than in other regions.

Global: selected pet claims as a % of pet food NPD, March 2019-Feb 2020



Brands ensure owners can meet the nutritional needs of their pets with age appropriate foods.



Kittens

Delectables Bisque Kitten Lickable Treat with Tuna is a 100% nutritionally complete and balanced creamy blend of succulent tuna for weaning kittens up to 12 months old (US).



Adults

Heritage Ranch by H-E-B Lamb & Brown Rice Recipe Adult Dog Food features real lamb as a first ingredient, omega-3 and -6 to support healthy joints and a shiny coat and added **fruits and vegetables** that provide fiber (US).



Seniors

The Blue Buffalo Co. Blue Life Protection Formula for Senior Dogs is made with the finest ingredients enhanced with vitamins and minerals and supplemented by LifeSource bits with vital nutrients and antioxidants (US).



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FreshPet continues to climb, offers greater customizability

Highlighting an opportunity to distance snack bars from negative connotations While the brand offers a variety of foods and treats for both dogs and cats, dog products account for nearly **96%** of multi-outlet sales. A notable new entry for the brand in early 2019 is Homestyle Creations, a line of mix-and-match meal components that allow dog owners to create customized meals for their pets. The line, which may be seen as a store-based response to the growing number of online subscription services offering meals customized to individual pets' needs and tastes, includes beef and chicken patties that **can be paired with a variety of mixers consisting of “antioxidant-rich fruits and vegetables.”**



Cranberries, Carrots & Green Beans Mix-In Meal Complement for Dogs

Freshpet Homestyle Creations Healthy Mixers Cranberries, Carrots & Green Beans Mix-In Meal Complement for Dogs is now available. The product is a complementary food formulated for supplemental feeding, and contains antioxidant-rich fruits and veggies. It retails in a 4.5-oz. pack.



Bananas, Cranberries & Blueberries Mix-In Meal Complement for Dogs

Freshpet Homestyle Creations Healthy Mixers Bananas, Cranberries & Blueberries Mix-In Meal Complement for Dogs is now available. This mix-in meal complement for dogs is formulated for supplemental feeding, and comprises antioxidant rich bananas and berries. This product retails in a 4.5-oz. pack.



Tender Chicken & Beef Recipe

Made with fresh ingredients including real chicken and beef, garden vegetables in gravy, and gently cooked to lock in nutrients. The product is all natural, contains added vitamins and minerals, and is suitable for adult cats. It retails in a 128g pack.



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Pet owners want the best for their pets, but are skeptical of health claims

- While pet owners are likely to agree that it's important to feed their pet the highest quality pet food, many approach the pet food aisle with a degree of skepticism.
- US consumers **agree that they are skeptical of the claims that most pet foods make**, underscoring the importance of information and transparency in pet food marketing. While marketers may be inclined to add more health claims to pet food packaging, making multiple claims compelling and believable is more of a challenge.





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Younger pet owners have stronger interest in natural ingredients and sustainability

Consistent with their preferences for their own food and beverages, **younger pet owners are more interested than older owners in nutrition, natural ingredients, and sustainability when it comes to selecting food and treats.** The growth of natural meat treats in the market reflects interest in less-processed and healthier pet products.

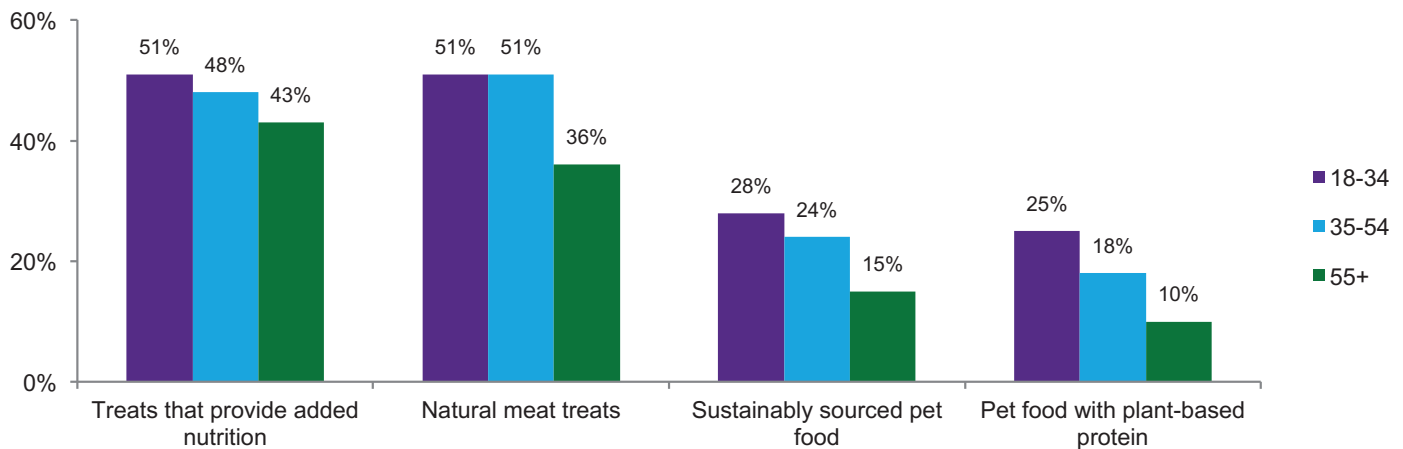
ALL NATURAL FOOD

41%

of pet owners aged 18-34 rate all natural as an important purchase factor compared to just 29% of those aged 55+.

US: Interest in food and treat concepts, by age, 2019

Question: Which of the following pet foods and treats are you interested in seeing more of? Select all that apply.



Base: 1,695 internet users aged 18+ who own any type of pet

Source: Lightspeed/Mintel



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Mood food concepts have further potential in pet food

- **Botanical ingredients for stress/sleep issues:** Pet foods made with botanical ingredients – eg calming herbs and adaptogens, which are rich in vitamins, minerals, and amino acids required for inhibitor neurotransmitter synthesis – will appeal to pet owners looking for functional foods to ease their pets' stress and improve their sleep.
- **Holistic health:** Consumers' quest for more natural remedies and a holistic approach to their own and pets' lives opens up opportunities for pet food products based on natural remedies and ancient medicinal approaches such as traditional Chinese medicine, Jamu and Ayurveda.

Dog Treats

The Bear & The Rat Bacon & Peanut Butter Flavored Frozen Yogurt Dog Treat is made with real yogurt and is formulated with Optagest boost, which contains prebiotics and digestive enzymes (US).



Catnip for relaxation

Natures:Menu Country Hunter 96% Turkey & Rabbit with Wholesome Superfoods Adult Cat Food. Contains a number of botanicals including catnip to ease stress for a relaxed/happy cat, and yucca to support joints, skin and digestive health (UK).



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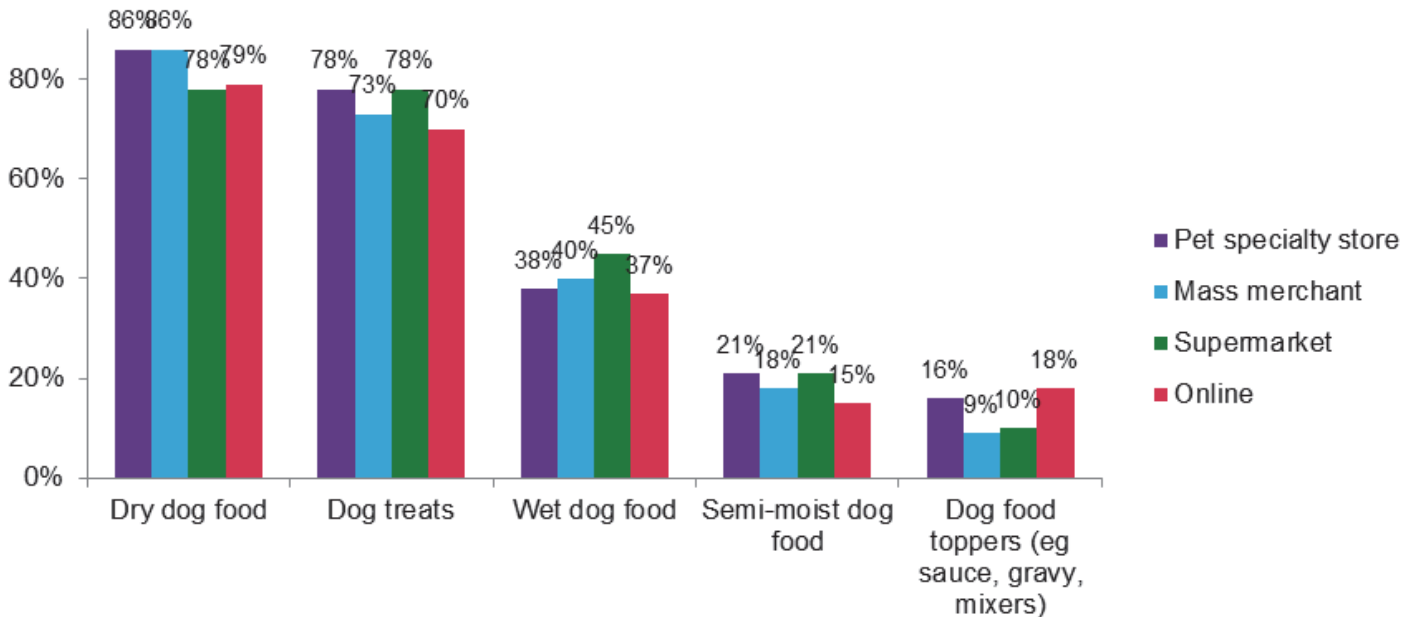
Pet specialty and online shoppers more likely to buy add-on food products

While purchase incidence of dry food, wet food, and treats are relatively consistent across retail channels, purchase of dog food toppers skews to pet specialty and online, consistent with a higher level of dog care engagement among owners that shop primarily in these channels.



Digestive & Maintenance Blend Dog Food Supplement

US: Dog food/treats purchased, by most often retail channel, 2019



Base: 1,695 internet users aged 18+ who own any type of pet

Source: Lightspeed/Mintel



Pet Food

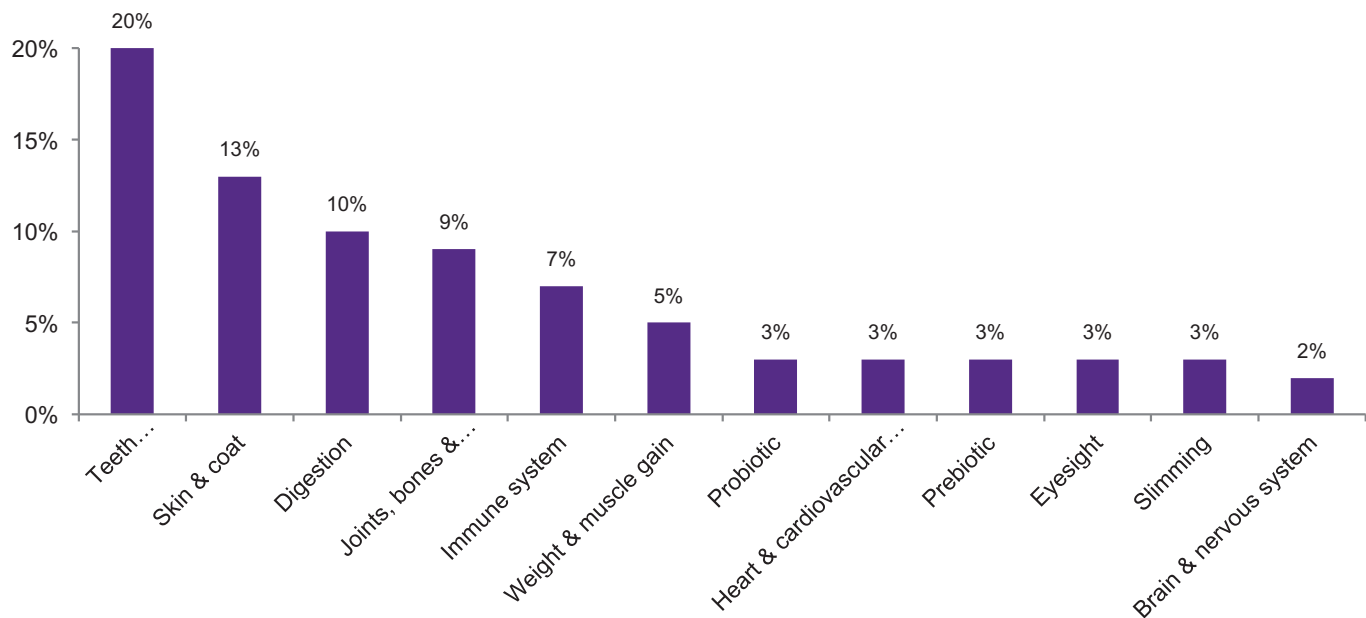
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Functional health claims become increasingly common on pet food and treat packaging

Roughly **40%** of pet food and treat products make at least one on-pack functional health claim. While many claims revolve around teeth, skin, and coat, a wide range of other health concerns are addressed as well. The increasing presence of functional health claims responds to pet owners' focus on their pets' health, but may also make it more difficult for individual brands to set themselves apart.



Incidence of functional health claims on pet food and treat launches, 2019





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More functional dog food and treats in the US

Digestive health and more

All Natural Chicken Flavored Small Treats for Dogs These grain-free treats are said to promote a healthy digestive system, to help remove plaque and tartar through chewing and to contain Ganeden BC30, probiotics and prebiotics (US).



Heart health support

Salmon Strips Natural Dog Treats are made with real pomegranates and cranberries. This product contains superfruits and antioxidants and supports heart health (US).

Multiple functional claims

Wild Game Recipe with Apple Jerky Dog Treats contain omega-3 and 6 fatty acids to help maintain healthy skin and coat; prebiotic inulin to assist with healthy digestion; and is a good source of calcium for strong teeth and bones (US).





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Tackling Food Waste with Upcycled Ingredients

Using upcycled ingredients and reducing the environmental footprint of pet food can help manufacturers to operate in a more ecologically responsible way – **something consumers want to see.**



In the US, Shameless Pets has launched a range of dog treats made from ingredients which otherwise would have been discarded. From apple pulp sourced from cideries, to lobster shells from canneries, Shameless Pets claims that up to 40% of the ingredients in its products are upcycled.



Fun Fact about us:

Upcycling is near and dear to Tree Top. In fact, Tree Top was started as a way to give a home to homeless fruit or fruit that might otherwise have gone to waste. Since 1960 – well before the term upcycling originated around 2000 – Tree Top was taking fruit unsuitable for the fresh market and turning it into delicious and nutritious fruit products and ingredients. Check out our video on "[Reducing Food Waste](#)".



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