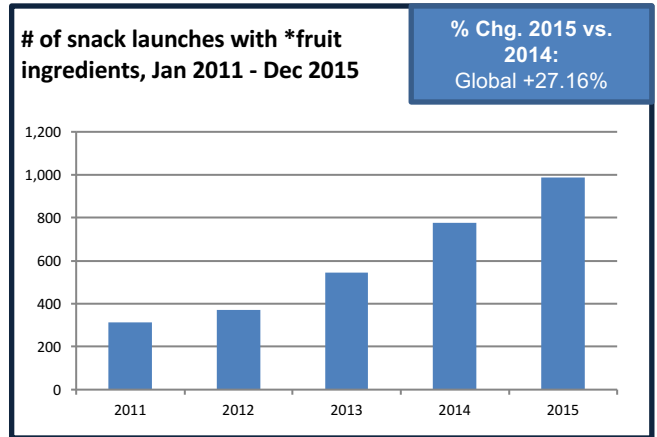
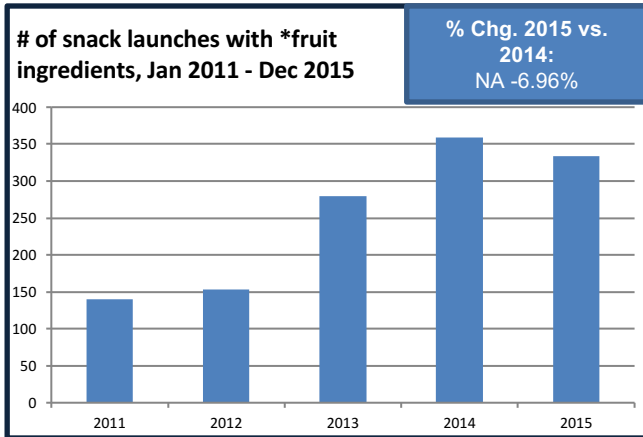


Mintel Update

Snack Trends with *Fruit Ingredients

December 2016



of NA snack launches w/ *fruit ingredients, by most active sub-categories, Jan. 2011 – Dec. 2015

Sub-Category	% change: 2011 - 2015	Total Sample
Snack/Cereal/Energy Bars	20.78%	48.18%
Fruit Snacks	-23.15%	42.02%
Snack Mixes	20.16%	9.79%
Total Sample	0.00%	100.00%

Total NA sample = 1,266 products

of Global (excluding NA) snack launches w/ *fruit ingredients, by most active sub-categories, Jan. 2011 – Dec. 2015

Sub-Category	% change: 2011 - 2015	Total Sample
Snack/Cereal/Energy Bars	-0.83%	53.84%
Fruit Snacks	0.87%	39.39%
Snack Mixes	1.72%	6.78%
Total Sample	0.00%	100.00%

Total global (excluding NA) sample = 2,996 products

*Fruit Ingredients included in search are fruit concentrate, fruit flakes, fruit granules, fruit juice, fruit peel, fruit puree, fruit paste, fruit nectar, fruit solids

NA Ingredient Analysis

December 2016

of NA snack launches w/ *fruit ingredients, by most active fruit ingredients, Jan. 2011 – Dec. 2015



of NA snack launches w/ *fruit ingredients, by top growing fruit ingredients, Jan. 2011 – Dec. 2015

Individual Fruit Ingredients	% change 2011 - 2015	Total Sample
Apple Puree	60.7%	6.6%
Fruit Juice	21.1%	7.7%
Blueberry Juice Concentrate	8.3%	7.9%
Apple Juice Concentrate	1.7%	38.6%
Date Paste	-10.9%	7.6%
Elderberry Juice Concentrate	-17.9%	11.9%
Lemon Juice Concentrate	-25.8%	15.3%
Pear Juice Concentrate	-29.1%	8.2%
Strawberry Juice Concentrate	-35.9%	10.0%
Grape Juice Concentrate	-49.3%	8.2%
Total Sample	0.0%	100.0%

Individual Fruit Ingredient	% change 2011 - 2015	Total Sample
Apple Juice Concentrate	1.7%	38.6%
Lemon Juice Concentrate	-25.8%	15.3%
Elderberry Juice Concentrate	-17.9%	11.9%
Strawberry Juice Concentrate	-35.9%	10.0%
Pear Juice Concentrate	-29.1%	8.2%
Grape Juice Concentrate	-49.3%	8.2%
Blueberry Juice Concentrate	8.3%	7.9%
Fruit Juice	21.1%	7.7%
Date Paste	-10.9%	7.6%
Apple Puree	60.7%	6.6%
Total Sample	0.0%	100.0%

of NA snack launches w/ *fruit ingredients, by most active fruit ingredient group, Jan. 2011 – Dec. 2015



of NA snack launches w/ *fruit ingredients, by top growing fruit ingredient group, Jan. 2011 – Dec. 2015

Fruit Ingredient Groups	% change 2011 - 2015	Total Sample
Fruit Concentrates (and all children)	5.0%	73.2%
Fruit Purees, Pulps, Paste, Nectars, Compotes, Syrups (and all children)	-7.0%	30.9%
Fruit Juice (and all children)	-16.2%	23.5%
Fruit Granules (and all children)	-100.0%	0.24%
Total Sample	0.0%	100.0%

Fruit Ingredient Group	% change 2011 - 2015	Total Sample
Fruit Concentrates (and all children)	5.0%	73.2%
Fruit Purees, Pulps, Paste, Nectars, Compotes, Syrups (and all children)	-7.0%	30.9%
Fruit Juice (and all children)	-16.2%	23.5%
Total Sample	0.0%	100.0%

*Fruit Ingredients included in search are fruit concentrate, fruit flakes, fruit granules, fruit juice, fruit peel, fruit puree, fruit paste, fruit nectar, fruit solids

Global (excluding NA) Ingredient Analysis December 2016

of Global (excluding NA) snack launches w/
*fruit ingredients, by most active fruit ingredients, Jan. 2011 – Dec. 2015



of Global (excluding NA) snack launches w/
*fruit ingredients, by top growing fruit ingredients, Jan. 2011 – Dec. 2015

Individual Fruit Ingredients	% change: 2011 - 2015	Total Sample
Apple Juice Concentrate	11.17%	26.30%
Apple Puree	-3.57%	11.78%
Grape Juice Concentrate	-36.23%	7.74%
Fruit Juice	-26.34%	7.64%
Lemon Juice Concentrate	77.63%	7.21%
Elderberry Juice Concentrate	8.78%	6.11%
Apple Juice	-5.74%	5.94%
Strawberry Juice Concentrate	-21.89%	5.34%
Strawberry Puree	34.36%	5.17%
Lemon Juice	59.41%	4.37%
Total Sample	0.00%	100.00%

Individual Fruit Ingredients	% change: 2011 - 2015	Total Sample
Lemon Juice Concentrate	77.63%	7.21%
Lemon Juice	59.41%	4.37%
Strawberry Puree	34.36%	5.17%
Apple Juice Concentrate	11.17%	26.30%
Elderberry Juice Concentrate	8.78%	6.11%
Apple Puree	-3.57%	11.78%
Apple Juice	-5.74%	5.94%
Strawberry Juice Concentrate	-21.89%	5.34%
Fruit Juice	-26.34%	7.64%
Grape Juice Concentrate	-36.23%	7.74%
Total Sample	0.00%	100.00%

of Global (excluding NA) snack launches w/
*fruit ingredients, by most active fruit ingredient group, Jan. 2011 – Dec. 2015



of Global (excluding NA) snack launches w/
*fruit ingredients, by top growing fruit ingredient group, Jan. 2011 – Dec. 2015

Fruit Ingredient Group	% change: 2011 - 2015	Total Sample
Fruit Concentrates (and all children)	5.11%	51.13%
Fruit Purees, Pulps, Paste, Nectars, Compotes, Syrups (and all children)	-15.53%	38.89%
Fruit Juice (and all children)	1.54%	28.74%
Fruit Peel (and all children)	-9.85%	7.78%
Total Sample	0.00%	100.00%

Fruit Ingredient Group	% change: 2011 - 2015	Total Sample
Fruit Flakes (and all children)	38.16%	2.87%
Fruit Concentrates (and all children)	5.11%	51.13%
Fruit Juice (and all children)	1.54%	28.74%
Fruit Peel (and all children)	-9.85%	7.78%
Fruit Purees, Pulps, Paste, Nectars, Compotes, Syrups (and all children)	-15.53%	38.89%
Total Sample	0.00%	100.00%

*Fruit Ingredients included in search are fruit concentrate, fruit flakes, fruit granules, fruit juice, fruit peel, fruit puree, fruit paste, fruit nectar, fruit solids

For more information on fruit ingredient trends, please contact Tree Top at 509.698.1435

Product Examples with *Fruit Ingredients



Organic Wholesome Snack Bar with Brazil Nuts - USA



Snack Squares Crafted with Cranberry, Almond, Dark Chocolate- Puerto Rico



Fruit & Nut Trail Mix- USA

Salted Plum Pulp- China



Apple Squeezable Fruit Pouch- USA



Strawberry Fruit & Grain Bars- UK

