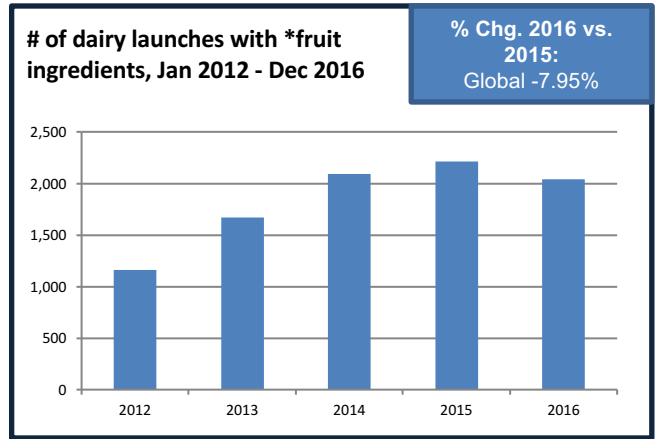
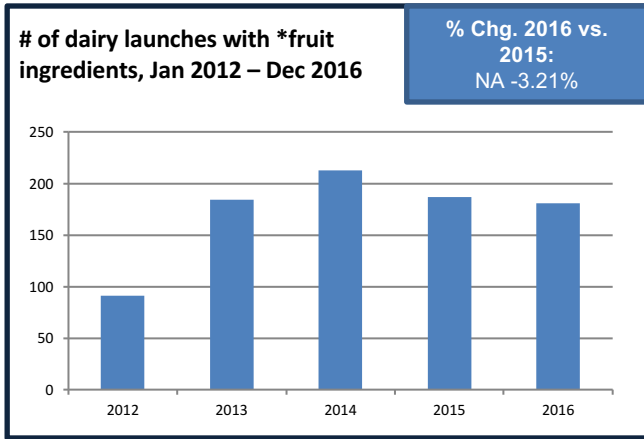


Mintel Update

Dairy Trends with *Fruit Ingredients

February 2017



% of NA dairy launches w/ *fruit ingredients, by most active sub-categories, Jan. 2015 – Dec. 2016

Sub-Category	% change: 2015 - 2016	Total Sample
Dairy Based Ice Cream & Frozen Yogurt	-12.79%	41.47%
Drinking Yogurt & Liquid Cultured Milk	12.38%	28.74%
Frozen Desserts	-44.65%	11.92%
Fresh Cheese & Cream Cheese	106.63%	4.67%
Processed Cheese	54.97%	4.32%
Soft Cheese Desserts	-13.90%	2.34%
Soft Cheese & Semi-Soft Cheese	313.26%	2.10%
Hard Cheese & Semi-Hard Cheese	209.94%	1.29%
Flavoured Milk	-31.12%	1.05%
Curd & Quark	3.31%	0.93%
Total Sample	0.00%	100.00%

Total NA sample = 856 products

% of Global (excluding NA) dairy launches w/ *fruit ingredients, by most active sub-categories, Jan. 2015 – Dec. 2016

Sub-Category	% change: 2015 - 2016	Total Sample
Drinking Yogurt & Liquid Cultured Milk	-1.80%	35.48%
Dairy Based Ice Cream & Frozen Yogurt	-2.18%	34.33%
Flavoured Milk	13.76%	9.76%
Soft Cheese Desserts	-0.95%	6.96%
Frozen Desserts	-8.96%	6.36%
Fresh Cheese & Cream Cheese	17.00%	1.99%
Processed Cheese	27.53%	1.20%
Soft Cheese & Semi-Soft Cheese	3.70%	1.09%
Butter	-5.53%	0.84%
Margarine & Other Blends	15.43%	0.50%
Total Sample	0.00%	100.00%

Total global (excluding NA) sample = 9,168 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

February 2017

**% of NA dairy launches w/ *fruit ingredients,
by most active fruit ingredients,
Jan. 2015 – Dec. 2016**



**% of NA dairy launches w/ *fruit ingredients,
by top growing fruit ingredients,
Jan. 2015 – Dec. 2016**

Individual Fruit Ingredient	% change: 2015 - 2016	Total Sample
Banana Puree	-8.84%	7.13%
Cherry Juice Concentrate	416.57%	4.09%
Fruit Juice	-13.90%	11.45%
Strawberry Puree	-4.63%	12.62%
Raspberry Puree	-33.58%	7.59%
Raspberry Juice Concentrate	n/a	4.21%
Lemon Juice Concentrate	22.10%	28.86%
Lemon Juice	-21.28%	10.16%
Orange Juice Concentrate	n/a	4.67%
Blueberry Puree	37.75%	4.21%
Total Sample	0.00%	100.00%

Individual Fruit Ingredient	% change: 2015 - 2016	Total Sample
Cherry Juice Concentrate	416.57%	4.09%
Orange Peel	416.57%	1.40%
Blackcurrant Juice Concentrate	106.63%	0.58%
Pineapple Juice Concentrate	106.63%	2.22%
Blueberry Juice Concentrate	65.30%	3.97%
Cherry Puree	54.97%	0.93%
Pomegranate Juice Concentrate	37.75%	2.57%
Blueberry Puree	37.75%	4.21%
Lemon Juice Concentrate	22.10%	28.86%
Lime Peel	3.31%	0.82%
Total Sample	0.00%	100.00%

**% of NA dairy launches w/ *fruit ingredients,
by most active fruit ingredient group,
Jan. 2015 – Dec. 2016**



**% of NA dairy launches w/ *fruit ingredients,
by top growing fruit ingredient group,
Jan. 2015 – Dec. 2016**

Fruit Ingredient Group	% change: 2015 - 2016	Total Sample
Fruit Concentrates (and all children)	1.35%	56.07%
Fruit Flakes (and all children)	n/a	0.23%
Fruit Juice (and all children)	-36.78%	30.72%
Fruit Peel (and all children)	44.64%	6.07%
Fruit Purees, Pulpes, Paste, Nectars, Compotes, Syrups (and all children)	-8.56%	42.41%
Fruit Solids (and all children)	n/a	0.47%
Total Sample	0.00%	100.00%

Fruit Ingredient Group	% change: 2015 - 2016	Total Sample
Fruit Peel (and all children)	44.64%	6.07%
Fruit Concentrates (and all children)	1.35%	56.07%
Fruit Purees, Pulpes, Paste, Nectars, Compotes, Syrups (and all children)	-8.56%	42.41%
Fruit Juice (and all children)	-36.78%	30.72%
Fruit Flakes (and all children)	-100.00%	0.23%
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

Global (excluding NA) Ingredient Analysis

February 2017

% of Global (excluding NA) dairy launches w/
*fruit ingredients, by most active fruit ingredients, Jan. 2015 – Dec. 2016



% of Global (excluding NA) dairy launches w/
*fruit ingredients, by top growing fruit ingredients, Jan. 2015 – Dec. 2016

Individual Fruit Ingredients	% change: 2015 - 2016	Total Sample
Lemon Juice Concentrate	-1.11%	18.82%
Strawberry Puree	-8.39%	10.89%
Lemon Juice	-4.11%	9.28%
Strawberry Juice	-14.49%	8.82%
Raspberry Puree	-14.98%	6.42%
Apple Juice Concentrate	23.93%	6.13%
Strawberry Pulp	22.35%	5.51%
Strawberry Juice Concentrate	3.15%	4.16%
Apple Juice	n/a	3.74%
Banana Puree	31.59%	3.72%
Total Sample	0.00%	100.00%

Individual Fruit Ingredients	% change: 2015 - 2016	Total Sample
Grape Must	443.20%	0.12%
Mandarin Juice	334.56%	0.14%
Plum Puree	334.56%	0.14%
Papaya Juice	334.56%	0.11%
Blackberry Syrup	334.56%	0.05%
Kiwi Pulp	280.24%	0.15%
Grapefruit Juice	225.92%	0.20%
Blueberry Pulp	225.92%	0.25%
Papaya Juice Concentrate	225.92%	0.10%
Mango Syrup	225.92%	0.04%
Total Sample	0.00%	100.00%

% of Global (excluding NA) dairy launches w/
*fruit ingredients, by most active fruit ingredient group, Jan. 2015 – Dec. 2016



% of Global (excluding NA) dairy launches w/
*fruit ingredients, by top growing fruit ingredient group, Jan. 2015 – Dec. 2016

Fruit Ingredient Group	% change: 2015 - 2016	Total Sample
Fruit Purees, Pulpes, Paste, Nectars, Compotes, Syrups (and all children)	0.76%	44.14%
Fruit Concentrates (and all children)	8.99%	40.96%
Fruit Juice (and all children)	-6.69%	40.60%
Fruit Peel (and all children)	4.29%	2.65%
Fruit Granules (and all children)	62.96%	0.17%
Fruit Flakes (and all children)	8.64%	0.05%
Fruit Solids (and all children)	n/a	0.05%
Total Sample	0.00%	100.00%

Fruit Ingredient Group	% change: 2015 - 2016	Total Sample
Fruit Granules (and all children)	62.96%	0.17%
Fruit Concentrates (and all children)	8.99%	40.96%
Fruit Flakes (and all children)	8.64%	0.05%
Fruit Peel (and all children)	4.29%	2.65%
Fruit Purees, Pulpes, Paste, Nectars, Compotes, Syrups (and all children)	0.76%	44.14%
Fruit Juice (and all children)	-6.69%	40.60%
Fruit Solids (and all children)	-100.00%	0.05%
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



Gelato Filled Panettone - USA



Premium Cherry Ice Cream - Norway



Cranberry Flavored Creamy Goat Cheese - USA



Soft Cheese with Pineapple and Almonds - Germany

Pickled Pepper Artisan Cheese Spread - USA



Strawberry Lactic Acid Drink - Japan