

This section of the monthly update focuses on a specific food/drink category, aiming to provide you with an understanding of what's trending across new product introductions. This month's focus is: *Yogurt*

### Yogurt is seen as a good snack

Snacking and breakfast are both key occasions for yogurt consumption; **47% of US consumers saying spoonable yogurt is good as a snack.**

As more consumers eat meals on-the-go or replace meals with snacks, there is an opportunity to expand yogurt's participation in the convenience foods category.

As snacking has become a universal eating habit, consumers are increasingly looking for healthy, convenient alternatives to other, less healthy snacks. Many brands are targeting the 'in-between meal' occasion to meet the needs of health-conscious snackers.

**70%**  
Purchase  
Intent



**Get the Scoop!**  
See the Top Ten US  
Spoonable Yogurt  
products based on highest  
purchase intent scores –  
see page 5

### High protein yogurt suitable as post-workout snack

Protein is the most desired attribute of US consumers' ideal yogurt. When asked "If you could create your own ideal yogurt or yogurt drink, what would it be like?", **15% of US yogurt buyers chose 'high protein'.**

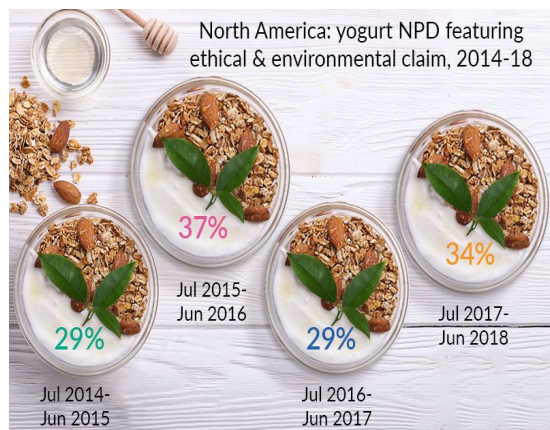
To respond to consumer demand for a protein snack with strong nutritional profile, **Dannon Oikos Protein Crunch** range features non-fat yogurt and toppings. It is made with grade A milk and provides 17g of protein, 6g fibre and vitamin D. It is said to be a great source of calcium and suitable as a post-workout snack.



For more information, please contact  
Tree Top at 509-698-1435

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### Yogurt producers place ethical claims at the forefront of their product development strategies



Ethical & environmental claims appeared on **34% of new product launches in the yogurt category** in the latest review period, with a general upward trend over the last four years.

Animal welfare weighs significantly on consumers' purchasing decisions, especially issues surrounding the use of antibiotics in agriculture, which has received considerable government and media attention in recent years.

As a response, brands are using "seals" and third party certification to guarantee better animal welfare to consumers. Recent initiatives go far beyond animal feed, ie grass fed and free roaming.

### Yogurt innovations focus on free from rBST hormones & animal welfare

**31% of US consumers cite 'animal treatment' as an important factor when considering how ethical a company is.** Yogurt operators are increasingly providing a greater degree of transparency in terms of ingredients. Beyond highlighting the exclusion of rBST hormones, brands are communicating on how animals are raised.



*Flying Cow Creamery Whole Milk Yogurt is sourced from cows raised on a small farm in Independence Valley, Washington, who are said to live the good life, happily and healthy.*



*Mountain High Original Plain Whole Milk Yogurt is made with real California milk from cows not treated with rBST and is cultured in the cup.*



*Karoun All Natural Mediterranean Style Yogurt is made with real grade A Californian milk from cows not treated with the growth hormone rBST.*

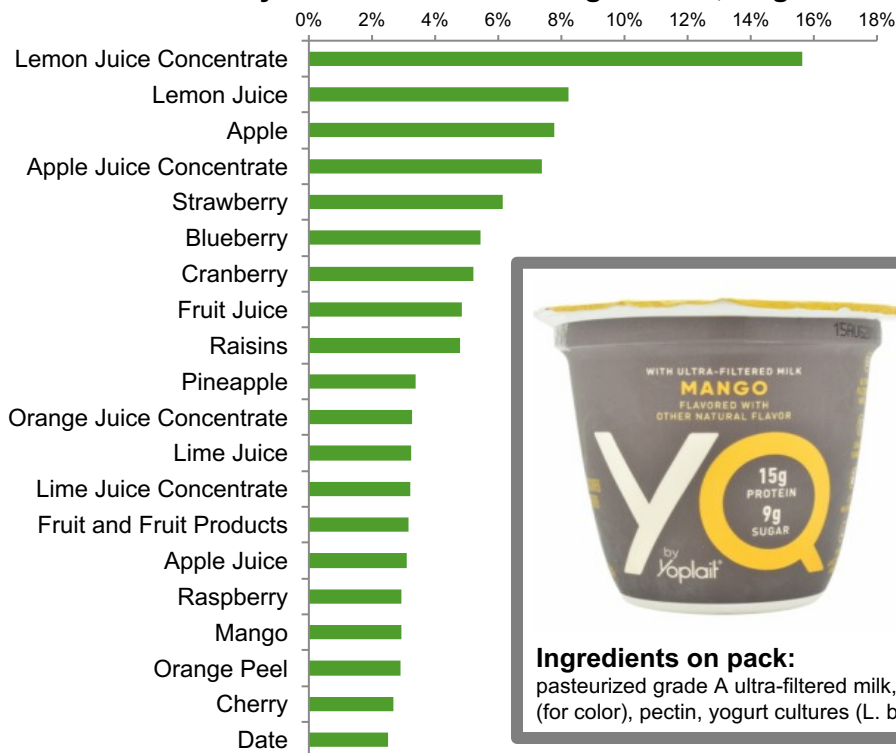
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This section of the monthly update keeps you informed on what's happening in fruit, focusing on popular and growing fruit ingredients being seen among drink products launched in North America.

### Most Active & Top Growing Fruit Ingredients

% of North America drink products with fruit listed as an ingredient, by 20 most active fruit ingredients, August 2017-July 2018



**YQ by Yoplait Lime Flavored Yogurt** is 99% lactose-free yogurt made with grade A ultra-filtered milk, cane sugar, mango flavor and other natural flavor. The gluten-free product provides 15g of protein and 9g of sugar, and contains 40% less sugar, 2% milk fat and live and active cultures.

**Ingredients on pack:**  
pasteurized grade A ultra-filtered milk, mangos, cane sugar, sea salt, carrot juice (for color), pectin, yogurt cultures (L. bulgaricus, S. thermophilus), natural flavor

% of North America drink products with fruit listed as an ingredient, by 10 top growing fruit ingredients, July 2016-June 2018

Emerging Fruit Ingredients	% change:	
	August 2016-July 2017 vs August 2017-July 2018	Total Sample
Lime Powder	110%	0.5%
Citrus Extracts	85%	0.4%
Luo Han Guo Extract	62%	1.2%
Pear Puree	43%	0.5%
Rosehip	33%	0.7%
Black Olive	33%	0.6%
Green Olive	32%	0.6%
Lemon	31%	1.9%
Tamarind Extract	30%	0.7%
Sour Cherry	29%	0.6%

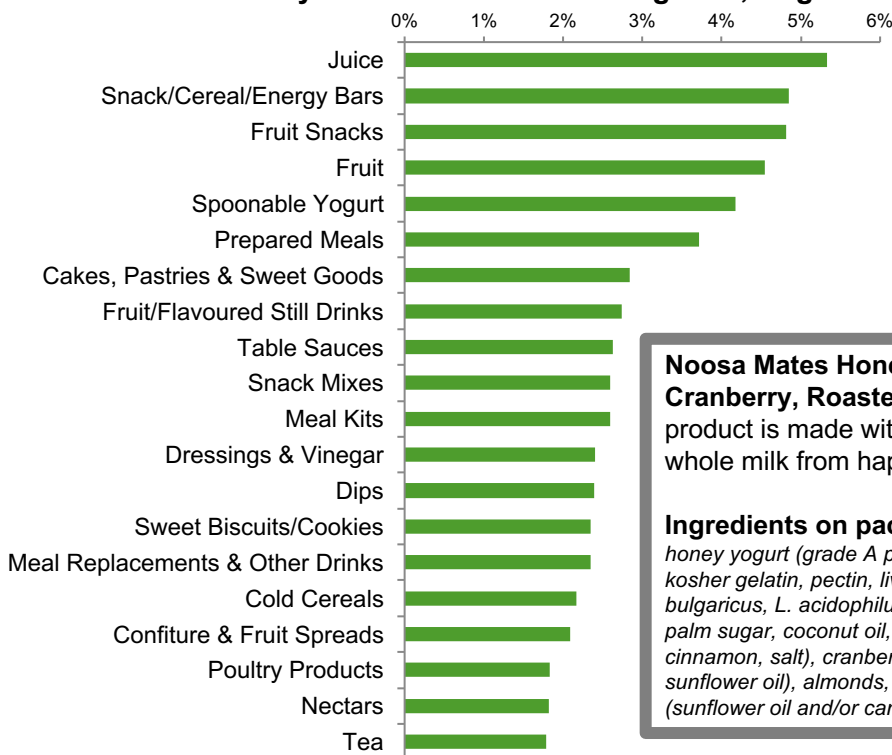
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This section of the monthly update keeps you informed on what's happening in fruit, focusing on popular and growing fruit ingredients being seen among food/drink products launched in North America.

### Most Active & Top Growing Categories with Fruit Ingredients

% of North America food & drink products with fruit listed as an ingredient, by 20 most active sub-categories, August 2017-July 2018



**Noosa Mates Honey Yogurt with Crunchy Granola, Cranberry, Roasted Almond & Pepitas** is a grade A product is made with all natural ingredients and with whole milk from happy cows never treated with rBGH.

#### Ingredients on pack:

honey yogurt (grade A pasteurized whole milk, cane sugar, honey, kosher gelatin, pectin, live active cultures (*S. thermophilus*, *L. bulgaricus*, *L. acidophilus*, *Bifidus*, *L. casei*)), granola (oats, coconut, palm sugar, coconut oil, sunflower seeds, amaranth, quinoa, chia, cinnamon, salt), cranberries (cranberries, sugar, glycerine, citric acid, sunflower oil), almonds, pepitas (pumpkin seeds, vegetable oil (sunflower oil and/or canola oil), salt)

% of North America food & drink products with fruit listed as an ingredient, by 10 top growing sub-categories, July 2016-June 2018

Emerging Sub-categories with Fruit Ingredients	% change: August 2016-July 2017 vs August 2017-July 2018	Total Sample
Butter	604%	0.1%
Instant Noodles	453%	0.1%
Beverage Mixes	273%	0.2%
Rice	269%	0.1%
Baby Cereals	262%	0.2%
Other Sauces & Seasonings	227%	0.4%
Medicated Confectionery	176%	0.1%
Pastry Dishes	168%	0.2%
Flavoured Alcoholic Beverages	165%	0.3%
Oils	151%	0.1%

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This **NEW** section of the monthly update allows you to see the top ten US **Spoonable Yogurt** products based on highest purchase intent scores\*. Purchase Intent scores are calculated based on the percent of consumers who responded that they would "likely" or "definitely would" buy these products after the price was revealed.



1

**Yoplait Original Mixed Berry Yogurt**  
75%\* Purchase Intent



2

**Yoplait Greek 100 Protein Strawberry Banana Flavored Fat Free Yogurt**  
73%\* Purchase Intent



3

**Yoplait Mix-Ins Cherry, Chocolate & Almond Traditional-Style Yogurt**  
71%\* Purchase Intent



4

**Chobani Smooth Old-Fashioned Non-Greek Strawberry Low Fat Yogurt**  
70%\* Purchase Intent



5

**Chobani Strawberry Banana Low Fat Greek Yogurt**  
70%\* Purchase Intent



6

**Yoplait Fruitside Strawberry Yogurt**  
70%\* Purchase Intent



7

**Yoplait Light Strawberry Yogurt with Nature Valley Granola**  
70%\* Purchase Intent



8

**Yoplait Original Mountain Blueberry Low Fat Yogurt**  
69%\* Purchase Intent



9

**Hill Country Fare Light Vanilla Nonfat Yogurt**  
68%\* Purchase Intent



10

**Yoplait Mix-Ins Coconut, Chocolate & Almond Traditional-Style Yogurt**  
68%\* Purchase Intent

\* Average purchase intent score for US **Spoonable Yogurt** = 44%

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