

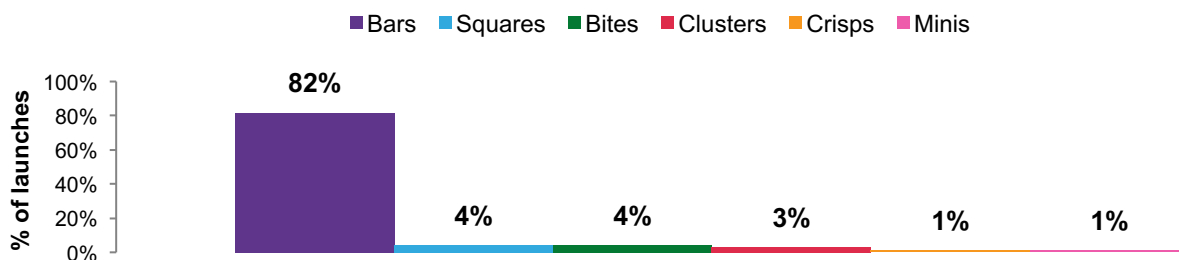
This section of the monthly update focuses on a specific food/drink category, aiming to provide you with an understanding of what's trending across new product introductions. This month's focus is: **Snack/Cereal/Energy Bars**

Snack bar brands offer consumers a range of formats

Launching new formats has been at the forefront of manufacturers development strategies recently to fit in with the lives of busy consumers who want more convenient snack options. Snack bars extending beyond the traditional bar format have been well received, thanks to growing demand for greater portion control and smaller indulgences.

75% of US snack bar users eat snack bars as a snack. 24% of Canadian snack bar users cite "size" as an important factor when choosing snack bars.

North America: cereal, energy & snack bars NPD by format type, April 2017 - March 2018



From bars to bite-sized

Many players have looked to extend their bar brands beyond one format. This has led to a proliferation of **bite-sized products in sharing bags that can be enjoyed by more than one person**. Many are also individually wrapped or retail in resealable bags suitable for on-the-go consumption.



Go Chews By Momme Meals Fig Ginger Sesame Energy Snacks are hand crafted in small batches and is said to be healthy and bite sized whole food for kids (US).



Manitoba Harvest Hemp Foods Hemp Heart Bites are described as a convenient, bite-size crunch snack that are ideal to eat on-the-go, at the gym and at lunch (US).



Thrive Tribe Maple Walnut Bites Paleo Snack Clusters comprise fruits, nuts, coconut and honey and are perfect for in the car or at the office (Canada).

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



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Formats evolve to squares, chips and minis



180° Snacks Pistachio Squares are made with simple ingredients including California pistachios. The small batch snack is free from GMOs, gluten and dairy (US).



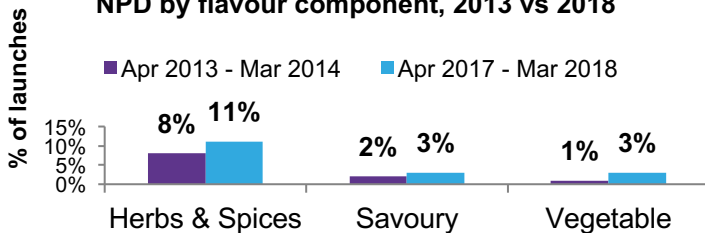
Nuty Goodness Chewy Fruit & Nut Chips are certified raw and clean and minimally processed. The vegan product features tangy rhubarb and fresh strawberries (US).



Made Good Chocolate Chips and Mixed Berry Granola Minis contain 10g of whole grains per serving, vegetable nutrients, and provide a source of fibre and vitamin B6 (Canada).

Savory flavors could move bars from snacking into meal replacements

North America: cereal, energy & snack bars NPDP by flavour component, 2013 vs 2018



Launches of savory-flavored or sweet/savory combination snack bars continue to increase, **offering both indulgence and health, and also moving beyond snacking and into meal replacements.**



Kind Sweet & Spicy Sweet Cayenne BBQ Almond (US)



Mediterra Savory Bar with Kale, Pomegranate, Quinoa & Almonds (US)



Véa World Recipes Thai Coconut Flavour Mini Crunch Bars (Canada)

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Bulletproof launches protein bar with added collagen



Bulletproof Collagen Protein Bar (US)

Bulletproof Vanilla Shortbread Collagen Protein Bar is an innovative product made with collagen protein from grass-fed cows. **It is rich in the same amino acids found in bone broth, which are the building blocks of bone, joints and skin.**

Launched in the US, this gluten-free product is made with ingredients that are delicately processed at low temperature to preserve their natural flavors, and retails in a 1.58-oz. pack.

Ocean Spray launches fruit clusters



Ocean Spray Craisins Fruit Clusters (US)

Ocean Spray has repackaged its Ocean Spray Craisins Cranberry Almond Fruit Clusters in the US.

Each bite-sized fruit cluster combines crunchy almonds with sweet chewy dried cranberries and wholegrain oats for a wholesome snack.

The clusters are said to be great as a topping on yogurt or ice cream, and retail in a 5-oz. resealable snacking size pack.

Crunch and granola are out-of-home approved



Almond Crunch with Chia & Flaxseed (US)

One of the more unusual formats in the cereal, energy and snack bar category is snack packs of crunches and granola. **Such formats allow consumers to snack out-of-home, such as in the office.**

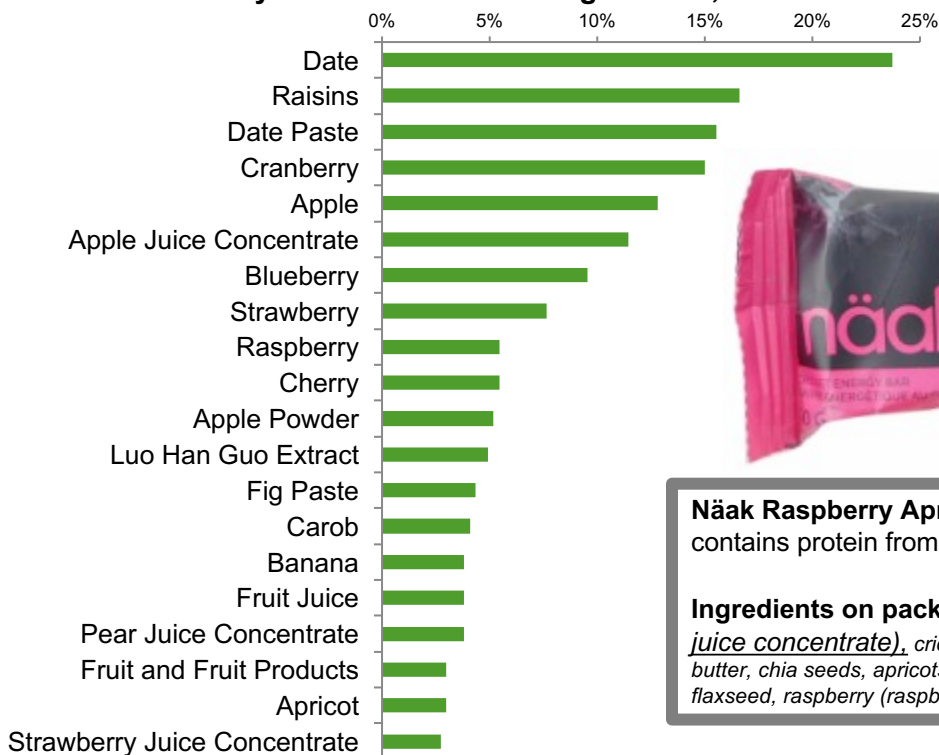
Melissa's Clean Snax Almond Crunch with Chia & Flaxseed is a range addition. The gluten-free crunchy product retails in a 6.5-oz. pack.

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

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 **Snack/Cereal/Energy Bars** launched in North America.

Most Active & Top Growing Fruit Ingredients

% of North America snack/cereal/energy bar products with fruit listed as an ingredient, by 20 most active fruit ingredients, November 2017-October 2018



Nääk Raspberry Apricot Cricket Energy Bar contains protein from a cricket. (Canada)

Ingredients on pack: *dates, apple juice (water, apple juice concentrate), cricket powder, raisins, sunflower seed butter, chia seeds, apricots (rice flour), maple syrup, oat flour, flaxseed, raspberry (raspberry, sugar), natural flavor, salt*

% of North America snack/cereal/energy bar products with fruit listed as an ingredient, by 10 top growing fruit ingredients, November 2016-October 2018

Emerging Fruit Ingredients	% change:		Total Sample
	Nov 2016-Oct 2017	vs Nov 2017-Oct 2018	
Carob	1449%		2%
Pineapple Juice Concentrate	313%		1%
Lime Juice Concentrate	210%		1%
Cherry Juice Concentrate	158%		1%
Pear Juice Concentrate	107%		3%
Banana Powder	107%		1%
Fig Paste	84%		3%
Grape Juice	81%		1%
Cherry	72%		4%
Citrus Fibre	72%		1%

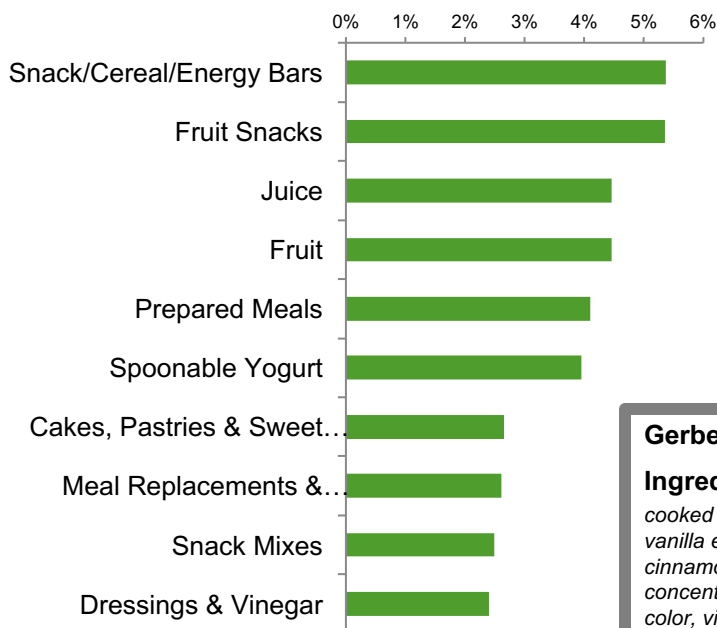
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This section of the monthly update keeps you informed on what's happening in fruit, focusing on popular and growing fruit ingredients being seen among food/drink products launched in North America.

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, November 2017-October 2018



Gerber Oatmeal & Barley Apple Cinnamon Cereal

Ingredients on pack: wholegrain oats and pearl barley cooked in water (wheat), apples, sugar, modified corn starch, vanilla extract, natural flavor, salt, enzyme, modified soy lecithin, cinnamon, ascorbic acid (vitamin C) to maintain color, lemon juice concentrate, lactic acid, calcium phosphate, turmeric extract for color, vitamins and minerals (iron (ferrous sulfate), zinc sulfate, vitamin E (alpha tocopherol acetate), niacinamide, vitamin B6 (pyridoxine hydrochloride), vitamin B2 (riboflavin), vitamin B1 (thiamin mononitrate), folic acid, vitamin B12 (cyanocobalamin))

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

Emerging Sub-categories with Fruit Ingredients	% change: Nov 2016-Oct 2017 vs Nov 2017-Oct 2018	Total Sample
Instant Noodles	706%	0.1%
Baby Cereals	560%	0.2%
Dessert Toppings	560%	0.1%
Flavoured Alcoholic Beverages	431%	0.3%
Butter	413%	0.1%
Baby Biscuits & Rusks	303%	0.2%
Oils	266%	0.1%
Potato Products	266%	0.0%
Beverage Mixes	218%	0.2%
Salads	198%	1.2%

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This **NEW** section of the monthly update allows you to see the top ten US **snack/cereal/energy bars with fruit ingredients** 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

Kellogg's Nutri Grain Apple Cinnamon Soft Baked Breakfast Bars

68%* Purchase Intent

2

Kellogg's Nutri Grain Strawberry Soft Baked Breakfast Bars

67%* Purchase Intent

3

Kellogg's Nutri Grain Soft Baked Breakfast Bars Variety Pack

66%* Purchase Intent

4

Quaker Chewy Strawberry Granola Bars with Yogurt Flavored Coating

65%* Purchase Intent

5

Quaker Chewy Oatmeal Raisin Granola Bars

65%* Purchase Intent



6

Kellogg's Special K Chocolate Cherry Nut Protein Snack Bars

64%* Purchase Intent

7

Fit & Active Strawberry with Yogurt Flavored Drizzle Vitality Cereal Bars

62%* Purchase Intent

8

Simply Balanced Blueberry Nut & Fruit Clusters

62%* Purchase Intent

9

Kellogg's Nutri-Grain Strawberry Soft Baked Breakfast Bars

62%* Purchase Intent

10

Kellogg's Special K Red Berries Chewy Snack Bars

61%* Purchase Intent

* Average purchase intent score for US **Snack/Cereal/Energy Bars with Fruit Ingredients** = 35%

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6 Source: Mintel Global New Products Database (GNPD)

