



Pet Food Vol. 2 Market Trends September 2021



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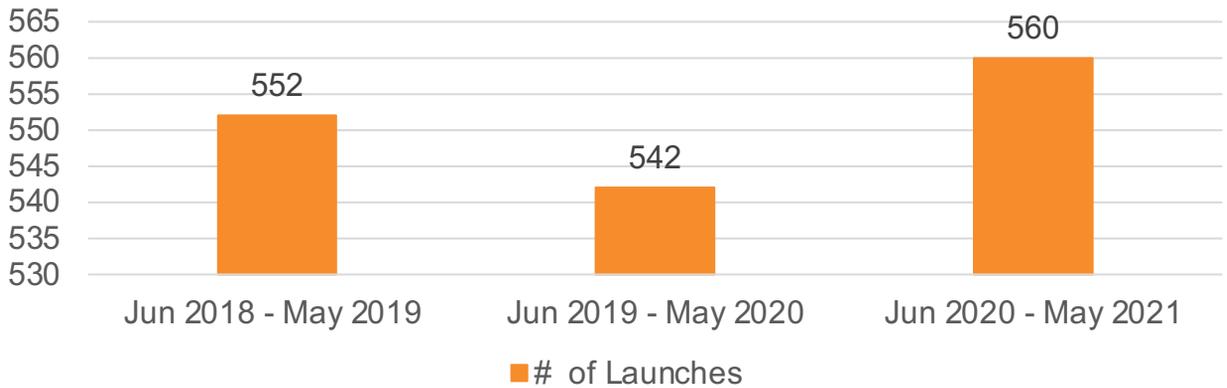
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Pet Food Vol. 2
September 2021

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: Launch Activity of Pet Food, Sep 2018 – Aug 2021



US: Top Fruit Ingredients for Pet Food Launches, Sep 2018 – Aug 2021

Fruit	Sep '18 – Aug '19	Sep '19 – May '20	Jun '20 – May '21	Total Sample (# of products)
Cranberry	48	68	45	161
Blueberry	37	61	37	135
Apple	33	39	37	109
Banana	3	11	8	22
Carob	7	5	3	15
Pomegranate	9	4	1	14
Apple Fiber	2	2	3	7
Blackberry	3	1	2	6
Citrus Pulp	1	4	1	6
Papaya	2	2	1	6



2021 Pet Food Launches with Fruit Ingredients



Wild-Caught Salmon, Egg & Sweet Potato Recipe has a simple ingredient recipe cat food with accents of **Cranberry** is made to promote healthy weight, hairball control and immune support. It contains natural probiotics for digestive health and the number one ingredient is wild-caught salmon

Original Peanut Butter & **Blueberry** Recipe Cricket Cookie Dog Treats comprise peanut butter, crickets, flaxseed, lentils and blueberries. This sustainable product is described as human, is great for sensitive dogs, has been made using less greenhouse gases and saves water, and is said to support a healthy balanced level of gut bacteria in dogs.

Cod, **Apples** & Carrots Crunchy Fish Sammies for Dogs are described as natural treats for medium and large dogs. This 100% pure and natural product is said to be super tasty and crunchy, and to have stuffed cod skin sandwich bites that are sustainably sourced and 100% wild caught.



Most Active & Highest Growth Flavors for Pet Food & Treat Launches in the US, Sep 2018 – Aug 2021

Sample Size: 1,654 products

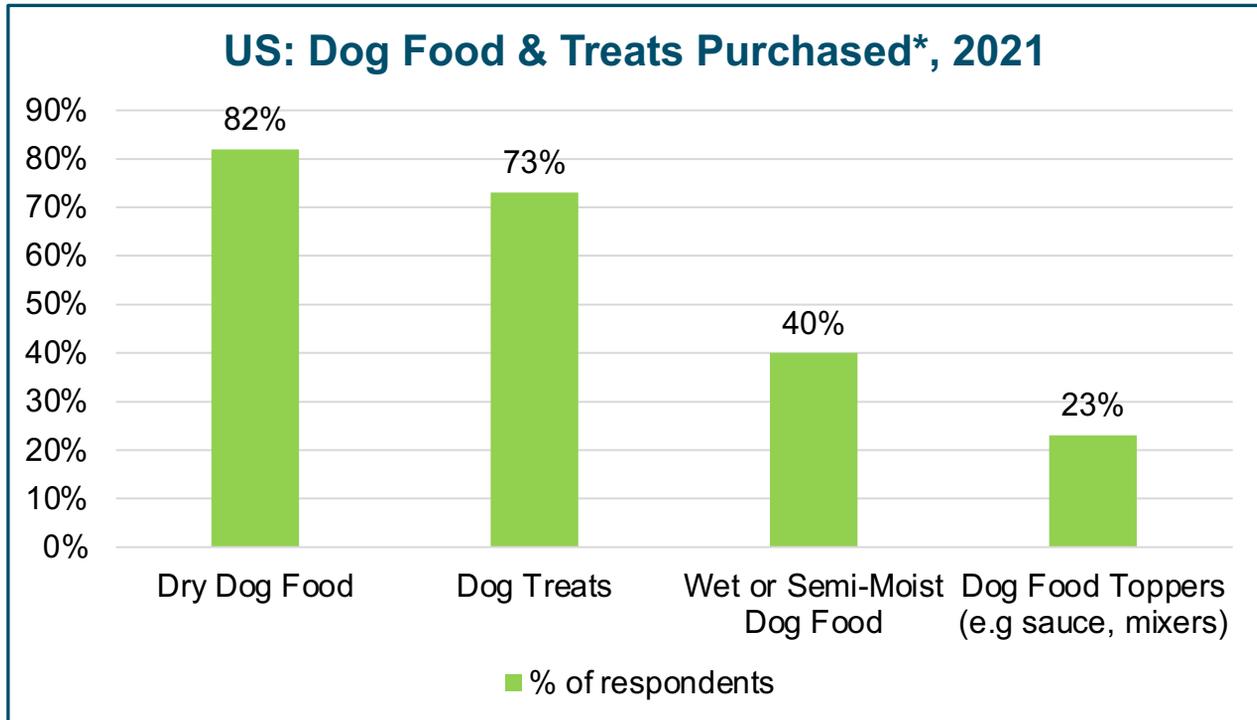
Ranked by # of Launches, % of Total Sample			
Rank	Flavor	# Launches	Total Sample
1	Chicken	258	15.6%
2	Beef	127	7.7%
3	Peanut Butter	61	3.7%
4	Salmon	53	3.2%
5	Bacon/Lardon/Panchetta/ Speck	34	2.1%
Ranked by % Growth of Launches			
Rank	Flavor	# Launches	% Change: Sep 2018 – Aug 2021
1	Pumpkin/Squash	12	600.0%
2	Chicken & Vegetable	28	240.0%
3	Tuna & (White) Fish	8	200.0%
4	Salmon & Sweet Potato	5	200.0%
5	Blueberry & Peanut Butter	4	200.0%



Dog Food and Treats Purchased: Wet Food, Treats & Toppers Have Momentum & Growth Potential

Dry food remains a default choice for most dog food purchasers, but other forms and products have more momentum. Wet food, driven by the growing prevalence of smaller dogs and interest in catering to dogs' taste preferences, is growing faster than dry and with past-three-month purchase incidence of just 40%, has ample room for further growth. Within wet, refrigerated food has a small but growing presence. Treats and toppers are also generating strong growth and have the potential for even higher purchase incidence and frequency.

Pet food retailers and marketers have an opportunity to generate incremental sales by promoting multi-form feeding encompassing different combinations of dry and wet foods and treats and toppers. While these product segments are often merchandised separately, featuring them together might more effectively demonstrate how they work together as a total feeding and care system.



*Which of the following have you purchased for your dog in the past three months? Please select all that apply.
Base: 1,067 internet users aged 18+ who own a dog and purchase pet food/treats



Gut health claims begin to appear on pet food packaging

Gut health claims have begun to appear in the category and have the potential to become a unifying theme in pet food marketing, effectively serving as an umbrella claim for a range of functional health benefits that pet food purchasers consider highly desirable. For a few brands, gut health exists as a separate claim attached to a few products in a broader line. For at least one, Solid Gold Pet, it serves as a central marketing theme for the brand overall, appearing prominently on the front of the package across all products.



Nature's Variety Instinct Raw Boost Mixers Gut Health Meal Enhancement for Dogs is part of a broader line of pet food toppers promising a variety of specific functional health benefits

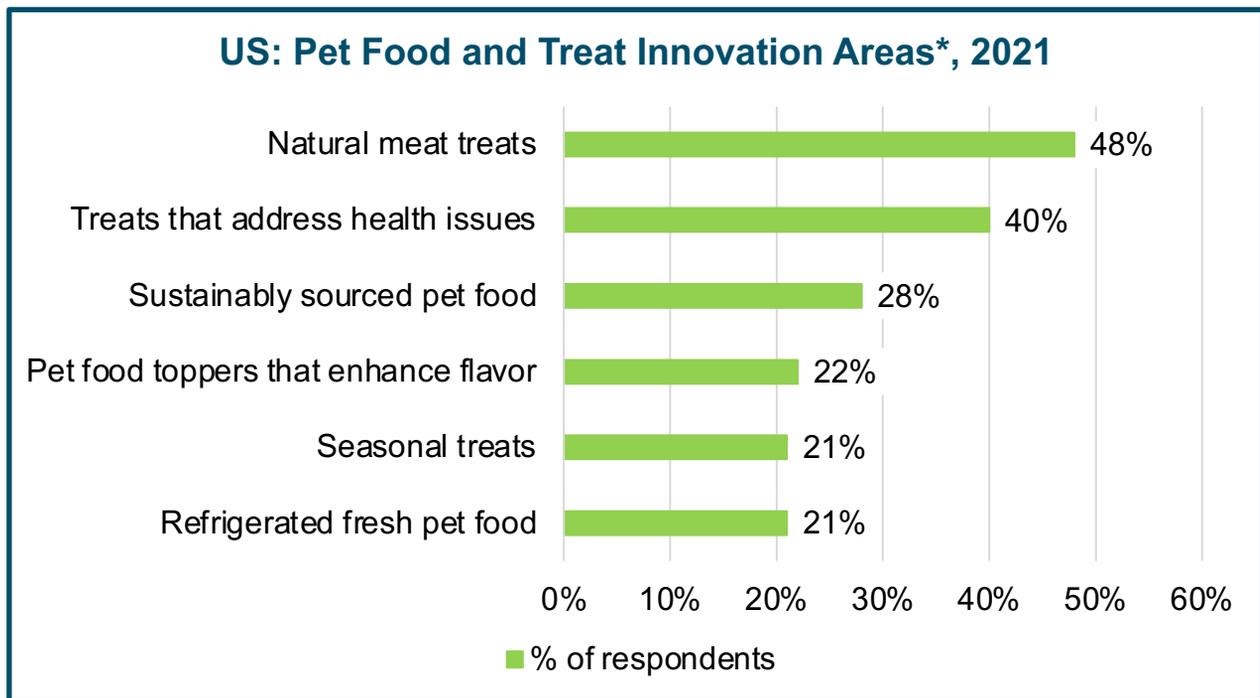
Solid Gold Pet makes gut health a core thrust of its marketing. The packaging highlights superfoods, living probiotics and omega fatty acids as benefitting gut health and providing overall immune support.





Pet Food & Treat Innovation Areas Pet Owners Want Variety In Treats, But Keep It Natural

Pet owners express interest in seeing more of a variety of treats and toppers, ranging from treats that address specific health benefits to more indulgent products, such as toppers, to enhance flavor or holiday themed treats. A common denominator, however, is all-natural. Nearly half of pet owners say they would like to see more natural meat treats. Regardless of the marketing theme or health benefit promised, pet owners will respond better if they view the product as more natural and less processed.



*"Which of the following pet foods and treats are you interested in seeing more of? Please select all that apply."
Base: 1,398 internet users aged 18+ who purchase pet food/treats

