

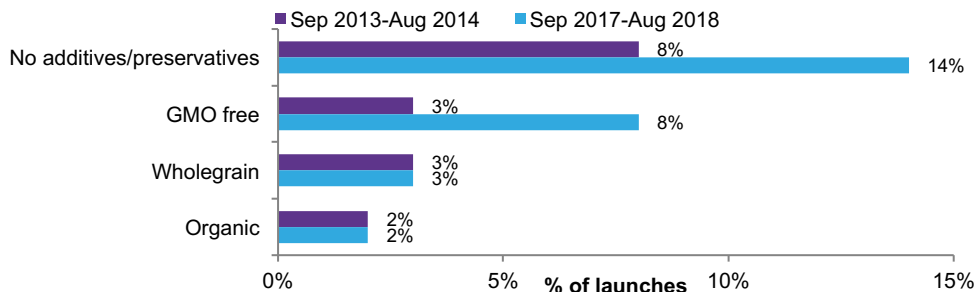
This section of the monthly update focuses on a specific food/drink category, aiming to provide you with an understanding of what's trending across new product introductions. This month's focus is: **Cakes, Pastries & Sweet Goods**

Consumers are looking to manufacturers and retailers to make transparency and traceability of products clearer

There is a growing consumer awareness of artificial additives and preservatives used in food, and in particular the demonization of certain ingredients such as high-fructose corn syrup (HFCS), which is leading sweet bakery consumers to question the ingredients that go into their cakes.

In Canada, 21% of adults who eat sweet baked goods consider all-natural ingredients/no artificial ingredients an important purchase factor.

North America: cakes and sweet goods NPD with natural claims, Sep 2013-Aug 2014 vs Sep 2017-Aug 2018



Sara Lee Perfect Pairings Country Apple Pie with a Sweet Maple Crust is naturally sweetened with maple syrup baked into the crust, is filled with orchard picked apples and contains no artificial flavors or HFCS (US).

Gluten-free launches emphasize clean ingredients



Natural Decadence Raised Gluten Free Dutch Apple Pie is described as a handmade fruit pie with flaky gluten-free crust and is made without egg, nuts, dairy or soy (US).



Soozy's Wild Blueberry Muffins comprise natural and unprocessed ingredients, are kosher- and paleo-certified and free from grain, gluten, dairy, peanut, soy, GMOs, fillers and other additives (US).



Urban Remedy Pumpkin Pie is a raw pie with flaky flax seed crust, topped with cashew cream. It is free from GMO, gluten and dairy, and suitable for vegans (US).

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



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Cakes tap into Mintel Trends

As described in the Mintel Trend *Moral Brands*, consumers don't need to spend time or money being ethical when the moral brand can do it on their behalf. In the US, **55% of adults say that they expect brands to be a force for positive change.**



Rubicon Bakers Handcrafted Vegan Chocolate Blackout Cupcakes (US)

Rubicon Bakers employs, trains, and supports people who need a second chance. *"Many employees come to Rubicon from life on the streets, from prison or recently recovered from substance abuse. We provide employment so they can turn their lives around."*

Jack Daniel's Tennessee Whiskey Cake with Pecan taps into the Mintel Trend *Extend My Brand*, where brands are expanding into new categories and demographics to find new business as well as intrigue consumers.



"Seems like a new twist on classic pound cake and not a lot of calories for a treat and good conversation over the novelty of it."
(Female, West, 55+)

While alcohol-infused/flavored cakes are not new, this is the first time on the GNPD where we have a cake prominently branded by the spirits producer rather than the bakery.

Ticklebelly launches lollipop cake



Ticklebelly cakes add extra appeal for social media sharing with its innovative display packaging design and a novel stick format. The cakes claim to use thoughtfully sourced ingredients, with perfect portion sizes and with flavours to tantalise the taste buds.

Ticklebelly Sweet Lemon Cake Bars are described as dipped sweet soft cakes on a stick. Other flavours include: Cookies 'n' Cream, Strawberry Shortcake, Luscious Red Velvet, Dark Chocolate, Vanilla Bean, Cotton Candy, and Sweet Pumpkin.

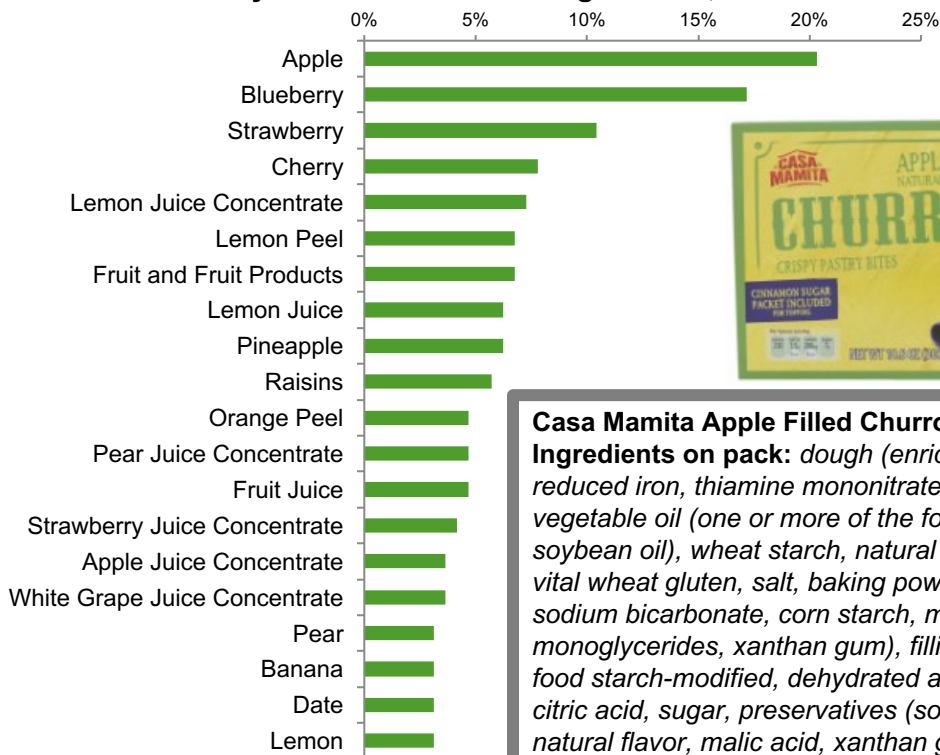
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This section of the monthly update keeps you informed on what's happening in fruit, focusing on popular and growing fruit ingredients being seen among *Cakes, Pastries & Sweet Goods* products launched in North America.

Most Active & Top Growing Fruit Ingredients

% of North America cake, pastry & sweet good products with fruit listed as an ingredient, by 20 most active fruit ingredients, October 2017-September 2018



Casa Mamita Apple Filled Churros Crispy Pastry Bites

Ingredients on pack: *dough (enriched wheat flour (wheat flour, niacin, reduced iron, thiamine mononitrate, riboflavin, folic acid), water, vegetable oil (one or more of the following (canola oil), cottonseed oil, soybean oil), wheat starch, natural flavor, food starch-modified, sugar, vital wheat gluten, salt, baking powder (sodium acid pyrophosphate, sodium bicarbonate, corn starch, monocalcium phosphate), egg whites, monoglycerides, xanthan gum), filling (water, high fructose corn syrup, food starch-modified, dehydrated apples (preserved) (sodium sulfite), citric acid, sugar, preservatives (sodium benzoate, potassium sorbate), natural flavor, malic acid, xanthan gum)*

% of North America cake, pastry & sweet good products with fruit listed as an ingredient, by 10 top growing fruit ingredients, July 2016-June 2018

Emerging Fruit Ingredients	% change:		Total Sample
	Oct 2016-Sep 2017	vs Oct 2017-Sep 2018	
Strawberry Juice Concentrate	354%		2%
Lemon Puree	354%		1%
Apple Juice	354%		1%
Pear Juice Concentrate	241%		3%
Fruit Juice	241%		3%
Raspberry Puree	241%		1%
Grape Juice Concentrate	241%		1%
Blackberry	184%		2%
Pineapple	127%		4%
Strawberry Juice	127%		1%

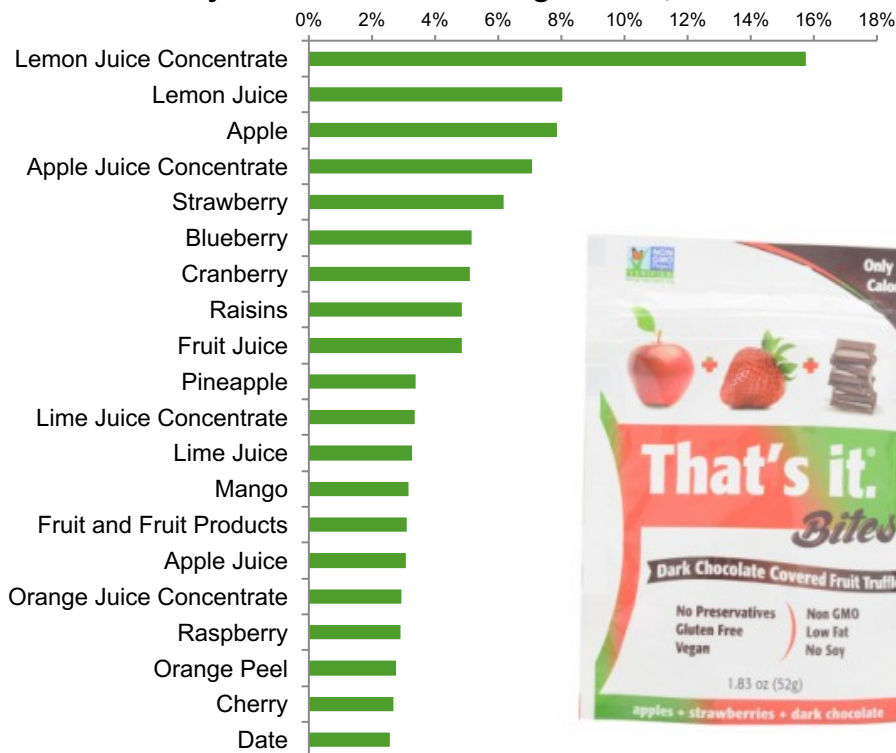
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This section of the monthly update keeps you informed on what's happening in fruit, focusing on popular and growing fruit ingredients being seen among food & drink products launched in North America.

Most Active & Top Growing Fruit Ingredients

% of North America food & drink products with fruit listed as an ingredient, by 20 most active fruit ingredients, October 2017-September 2018



That's It Bites Dark Chocolate Covered Apple & Strawberries Truffles are a vegan- and kosher-certified product that contains only 150 calories, is low in fat, and is free from preservatives, gluten, GMOs and soy.

Ingredients on pack:
 Apple, Strawberry, Dark Chocolate (Dark Chocolate, White Sugar, Cocoa Fat)

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

Emerging Fruit Ingredients	% change:		Total Sample
	Oct 2016-Sep 2017	vs Oct 2017-Sep 2018	
Lime Powder	161%		0.5%
Pear Puree	113%		0.5%
Coffee Fruit Extract	105%		0.3%
Green Olive	78%		0.7%
Black Olive	52%		0.6%
Luo Han Guo Extract	46%		1.3%
Cherry Powder	43%		1.0%
Rosehip	41%		0.7%
Date Paste	38%		0.9%
Olives	36%		1.4%

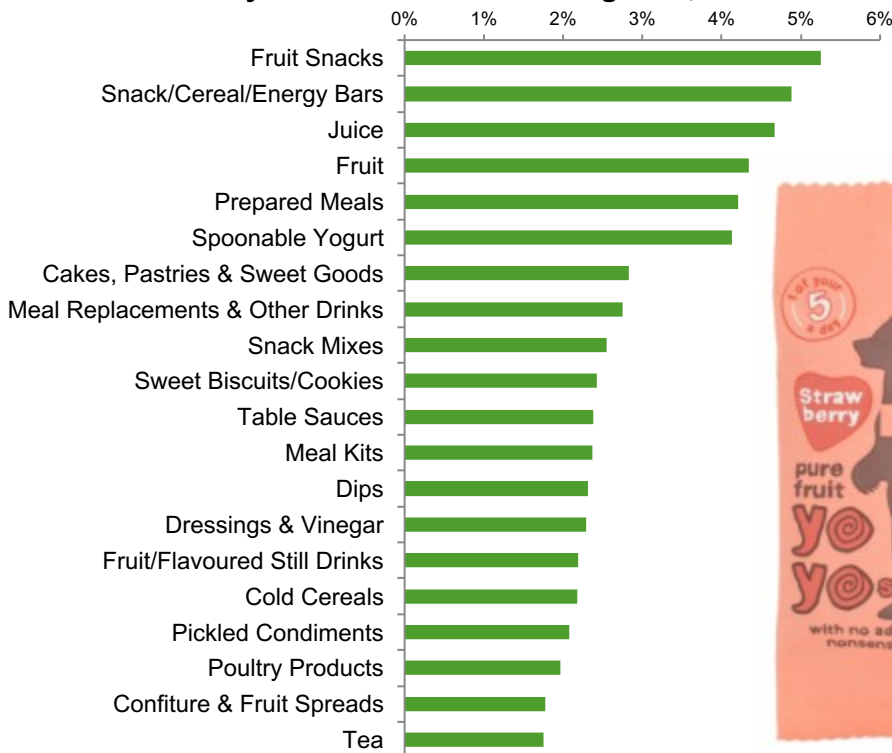
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This section of the monthly update keeps you informed on what's happening in fruit, focusing on popular and growing fruit ingredients being seen among food/drink products launched in North America.

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, October 2017-September 2018



Bear Yo Yos Strawberry Pure Fruit Rolls are vegan, kosher certified children-oriented products that provide one of the five daily servings of fruit and vegetables, and contains no added sugar, gluten or fruit concentrates. It has been gently baked, can be used in recipes and has been made with apples, pears and strawberries.

Ingredients on pack:
apples, pears, strawberries, black carrot extract

% 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:	
	Oct 2016-Sep 2017 vs Oct 2017-Sep 2018	Total Sample
Instant Noodles	1025%	0.1%
Dessert Toppings	923%	0.1%
Butter	718%	0.1%
Baby Cereals	616%	0.2%
Flavoured Alcoholic Beverages	480%	0.3%
Rice	343%	0.1%
Oils	207%	0.1%
Baby Biscuits & Rusks	166%	0.1%
Other Sauces & Seasonings	162%	0.4%
Baby Fruit Products, Desserts & Yogurts	158%	1.2%

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This **NEW** section of the monthly update allows you to see the top ten US **Cakes, Pastries & Sweet Goods products 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

**Signature Kitchens
Blueberry
Waffles**

72%* Purchase Intent

2

**Kellogg's Eggo
Strawberry
Waffles**

68%* Purchase Intent

3

**Pillsbury Toaster
Strudel
Blueberry
Toaster Pastries**

67%* Purchase Intent

4

**Pillsbury
Toaster Strudel
Strawberry
Toaster Pastries**

65%* Purchase Intent

5

**Kellogg's
Special K
Blueberry
Pastry Crisps**

63%* Purchase Intent



6

**EchoLakeFoods
Blueberry
Waffles**

63%* Purchase Intent

7

**Café Valley
Bakery
Blueberry Mini
Muffins**

63%* Purchase Intent

8

**Pillsbury
Toaster Strudel
Cherry Toaster
Pastries**

62%* Purchase Intent

9

**Entenmann's
Little Bites
Smurf Blueberry
Muffins**

58%* Purchase Intent

10

**Kellogg's Eggo
Chocolate
Chip Banana
Waffles**

58%* Purchase Intent

* Average purchase intent score for US **Cakes, Pastries & Sweet Goods with Fruit Ingredients** = 35%

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