



Pet Food & Pet Products Market Trends

May 2019



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Source:

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Mintel Global New Products Database (GNPD)



Pet Food

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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**.

Trends Spotlight: Pet Food & Pet Products

We're excited to share some of the latest report findings and key opportunities from Mintel, "**A year of innovation in pet food and products**," April 2019.

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.

Key Opportunities in North America:

- **Meet interest in all-natural pet food:** Brands can appeal to pet owners who are seeking natural pet food recipes by formulating without artificial additives and preservatives, and sourcing local and organic ingredients.
- **Be proactive about ingredient safety concerns:** Brands can reassure pet owners of the integrity and safety of their products by using human-grade ingredients. Being more transparent about the provenance and manufacturing details of pet food can win over consumers.
- **Target pets' emotional wellbeing:** With the growing recognition of the importance of mental health to humans, there are opportunities to innovate with products that can address mental wellbeing issues common to pets, such as anxiety and stress.

Pet ownership in the US

Brand Ownership

88%

of pet food buyers in the US are satisfied with their current brand of pet food

Help Owners Relax

60%

of pet owners in the US say their pets help them to relax

Treats

56%

of pet food buyers in the US give treats to their cat or dog on a daily basis



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Pet owners are looking for clean label ingredients

Consumers are increasingly **concerned about the ingredients** found not only in the food they eat, but also the food they feed their pets.

Consumer expectations about clean label have evolved from "safe" ingredients to information about sourcing and processing. To win consumer trust, **brands are increasingly expected to inform consumers** how, where and by whom the products have been created.



No ingredients from China
Purina Beyond Wild Salmon, Liver & Arctic Char Paté Natural Adult Cat Food is a wild prey-inspired pet food which is free from grains, ingredients from China, and artificial colors, flavors and preservatives (US).

37% of pet owners in the US strongly agree that they would like to know the origin of the ingredients.



Human-grade ingredients
Spot Farms Organics Organic Chicken Tenders are human-grade dog treats made in the USA with **organic chicken from Delaware**. The chickens are fed organic grain and the treats are free from GMOs, corn, soy, wheat and glycerin (US).

This appetite for detailed provenance information has extended to pet food. In the US, **53% of pet owners say that they check the ingredients list when buying new pet food or treats.**



Made with three natural ingredients
Applaws Layers Tuna with Shrimp in Aspic Limited Ingredient Natural Cat Food is said to offer two layers of great tasting ingredients into a single dish and is made with **three natural ingredients** (US).



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Dog owners are more likely to seek out natural ingredients

39% of dog owners and 28% of cat owners in the US look for all-natural. In the 12 months to February 2019, as much as 44% of pet food and pet product NPD in North America featured the no additive/preservative claim.



No artificial flavors or preservatives

Abound Grain-Free Duck, Sweet Potato & Venison Recipe for Adult Dogs is a natural dog food featuring duck as the main ingredient. It contains no wheat, corn, soy, animal by-product meal, artificial colors, flavors or preservatives (US).



All-natural ingredients

Fruitables Natural Dog Treats Pumpkin & Apple Flavored Dog Treats are a 100% natural and healthy and crunchy treat and contain no wheat, corn, soy or artificial ingredients, colors or preservatives (Canada).



Organic ingredients

Newman's Own High Protein Advanced Dog Formula is made with organic grains and vegetables and is free of artificial colors, flavor enhancers, wheat, corn, antibiotics and chemical additives (US).

Meat as the main ingredient

In the US, 35/40% of cat/dog owners look for real meat as the first ingredient when buying pet food or treats.



Chicken as the first ingredient

Milo's Kitchen Chicken Meatballs home-style dog treats are made with real chicken as the number one ingredient, are high in protein and are free from artificial flavors, colors or meat by-products (US).



Real meat as the first ingredient

American Journey Grain-Free Beef & Vegetable Stew in Gravy Dog Food contains real meat as the first ingredient and features high-quality proteins, wholesome vegetables and essential supplements (US).



Pork is the first ingredient

Cesar Grain-Free Jerky Bites Pork & Peach Recipe Dog Treats are specially prepared with select ingredients and always made with real meat as the first ingredient (US).



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Tackling anxiety in pets

The growing interest in a more holistic approach to wellbeing – looking not just at the health benefits of the food we eat, but also the **mood-boosting benefits** various foods can bring – is explored in the Mintel Trend *Mood to Order*.

A recent innovation in pet food which relates to this is Life by Tropiclean, a **supplement for dogs which helps to reduce stress, nervousness and tension**. The product features L-Theanine, an amino acid found in green tea, along with a blend of coconut oil and herbs which are said to help promote calm and healthy rest and reduce stress and anxiety.

Life By Tropiclean Calming Aid Supplement for Dogs
(US)

Pet owners are looking for fortified pet foods

In the US, 22% of cat owners and 26% of dog owners are looking for pet foods enriched with vitamins.



Total health support
VetIQ Multi Vitamin Chicken Flavor Soft Chews for Dog is described as total health support for adult dogs and is formulated with omega-3 from fish oil, superfoods such as kelp and blueberries and prebiotics from chicory root (US).

Hemp extract for overall health
Go Green Hemp Beef Flavored Chewy Bites provide a full spectrum organic hemp extract to dogs and are specially formulated to help canines with pain, inflammation, stress, anxiety and overall health and wellness (US).

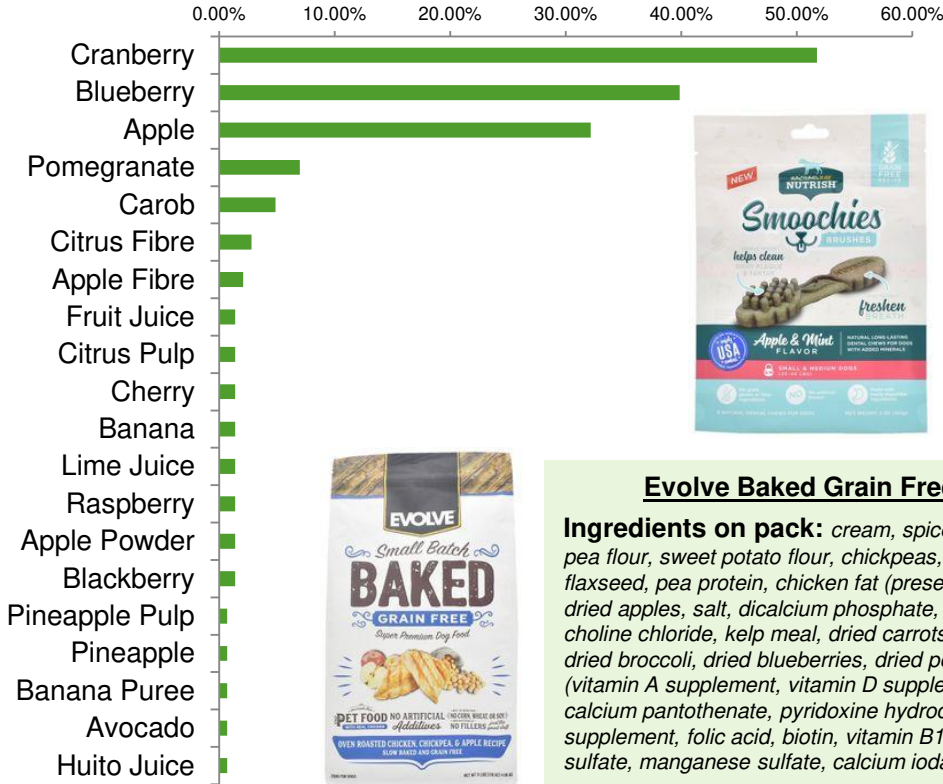
LifeSource Bits
Chicken and Brown Rice Recipe Natural Food for Small Breed Adult Dogs is enhanced with vitamins and minerals. The food is supplemented with LifeSource bits: a 'cold-formed combination of nutrients and antioxidants' (US).



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

Most Active & Top Growing Fruit Ingredients

% of North America pet food products with fruit listed as an ingredient, by 20 most active fruit ingredients, Apr 2018 – Mar 2019



Rachael Ray Nutrish Smoochies Apple & Mint Flavored Dental Treats for Dog

Ingredients on pack: tapioca, potato flour, pea starch, vegetable glycerin, pea fiber, quinoa, apple, tricalcium phosphate, natural flavor, calcium carbonate, sunflower oil, salt, citric acid (a preservative), vinegar (a preservative), peppermint oil, turmeric (color), huito juice (color), watermelon juice (color)



Evolve Baked Grain Free Super Premium Dog Food

Ingredients on pack: cream, spiced apple deboned chicken, chicken meal, pea flour, sweet potato flour, chickpeas, tapioca starch, potato meal, ground flaxseed, pea protein, chicken fat (preserved) (mixed tocopherols), potato protein, dried apples, salt, dicalcium phosphate, natural chicken flavour, potassium chloride, choline chloride, kelp meal, dried carrots, dried parsley, dried spinach, chicory root, dried broccoli, dried blueberries, dried pomegranate, rosemary extract, vitamins (vitamin A supplement, vitamin D supplement, vitamin E supplement, niacin, d-calcium pantothenate, pyridoxine hydrochloride (source of vitamin B6), riboflavin supplement, folic acid, biotin, vitamin B12 supplement), minerals (zinc sulfate, copper sulfate, manganese sulfate, calcium iodate, sodium selenite, ferrous sulfate)

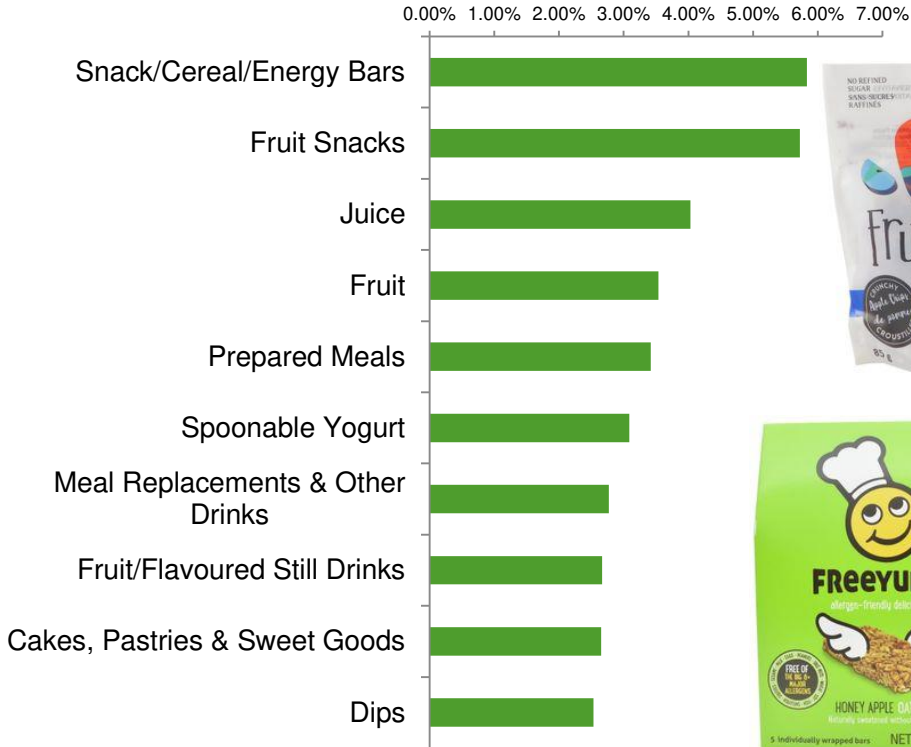
Emerging Fruit Ingredients seen in Pet Foods	% change: Apr 2017/Mar 2018 vs Apr 2018/Mar 2019	Total Sample
Citrus Fibre	437%	1.49%
Banana	169%	0.90%
Lime Juice	169%	0.90%
Cherry	34%	1.19%
Pineapple	34%	0.60%
Banana Puree	34%	0.60%
Pomegranate	22%	6.27%
Blueberry	3%	39.10%



This section of the monthly update keeps you informed on what's happening in fruit, focusing on popular and growing fruit ingredients being seen in 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 10 most active sub-categories, Apr 2018 – Mar 2019



Fruitivity Snacks **Crunchy Apple** **Chips Infused with** **Blueberry**

Ingredients on pack: apples, filtered water, concentrated blueberry juice, natural flavours, organic lemon juice



Freeyumm Honey **Apple Oat Bars**

Ingredients on pack: rolled oats, oat flakes, honey*, maple syrup, sunflower oil, coconut palm sugar*, oat flour, dried apples, sunflower seeds, ground flaxseed, vanilla extract*, salt, cinnamon *organic

Emerging Sub-categories with Fruit Ingredients	% change: Apr 2017/Mar 2018 vs Apr 2018/Mar 2019	Total Sample
Dessert Toppings	549%	0.11%
Cassava & Other Root-Based Snacks	399%	0.04%
Sports Drinks	287%	0.29%
Baby Biscuits & Rusks	219%	0.16%
Caramel & Cream Spreads	200%	0.03%
Baby Fruit Products, Desserts & Yogurts	189%	1.60%
Hot Cereals	185%	0.61%
Instant Noodles	175%	0.11%
Butter	166%	0.08%
Dry Soup	150%	0.05%