







# Pet Food Vol. 2 Market Trends September 2021



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

Michael Sellitto – Client Success Manager, Mintel Contributing Editor

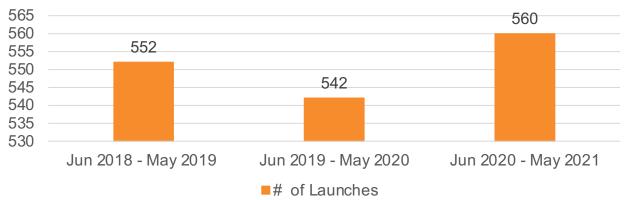




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# US: Launch Activity of Pet Food, Sep 2018 – Aug 2021



# 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
Рарауа	2	2	1	6



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# **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 wildcaught 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.



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### 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 Launche	s, % of Total Sa	nple
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 % Grow	th 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%



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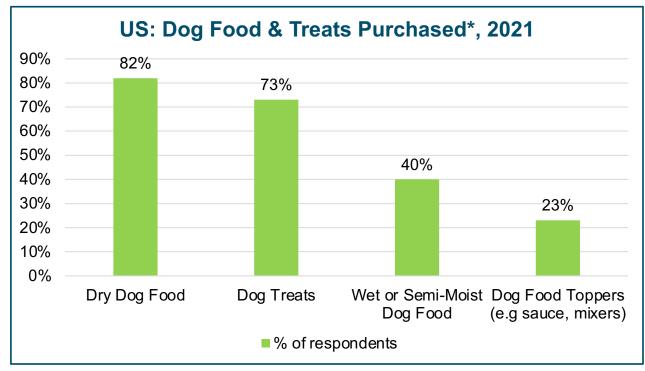


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#### Dog Food and Treats Purchased: Wet Food, Treats & Toppers Have Momentum & Growth Potential

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



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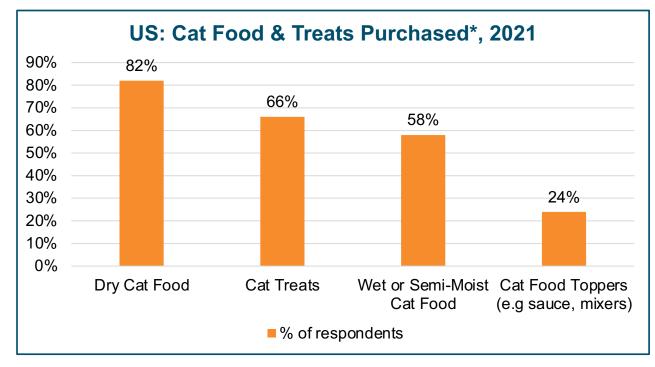


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#### Cat Food and Treats Purchased: Beyond Dry: Opportunities for Growth Across Segments

While purchase incidence of dry food is as high for cats as it is for dogs, wet food purchase is substantially higher for cat owners, a reflection of greater dual feeding among cat owners. Still, wet food, more closely associated with pampering and palatability than dry food, is growing faster than dry and appears to have room for further growth, as do treats and toppers. Consistent with the opportunity on the dog side of the pet food aisle, merchandising dry and wet food and treats and toppers together as an integrated feeding and care regimen could help to drive incremental sales across product segments.

Consistent with dog food toppers, purchase incidence of cat food toppers is highest among primary shoppers of pet specialty stores and online retailers. However, it has increased considerably in the past year among cat owners who shop for pet products primarily in mass merchants and supermarkets, an indication of the opportunity to drive incremental purchases such as toppers or treats across all retail channels.



\*"Which of the following have you purchased for your cat in the past three months? Please select all that apply." Base: 651 internet users aged 18+ who own a dog and purchase pet food/treats



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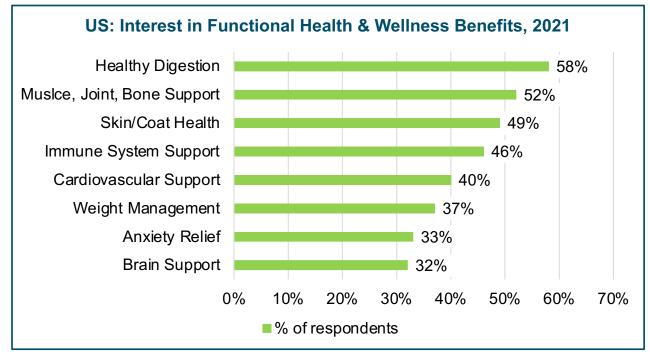


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#### Interest in Functional Health & Wellness Benefits Gut Health Has Potential To Be Unifying Theme For Pet Food

Pet owners express interest in a wide variety of functional benefits, reflecting their motivation to ensure their pets' health and longevity and consistent with the increasing prevalence of functional health claims on pet food packaging. Healthy digestion draws especially strong interest and is poised to gain even greater prominence in pet food marketing as awareness grows of the connection between gut health and other high-priority functional health benefits, such as skin and coat health, immunity support, weight management and even calming and anxiety relief.





\*Which of the following health and wellness benefits would you like to see in pet food and treats? Please select all that apply." Base: 1,398 internet users aged 18+ who purchase pet food/treats



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#### 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.





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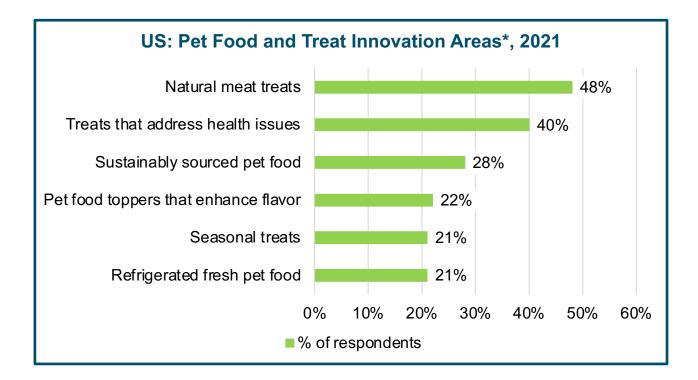




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#### Pet Food & Treat Innovation Areas Pet Owners Want Variety In Treats, But Keep It Natural

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 the 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



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#### **Plant-Based Pet Food Doesn't Cut It**

Within the human food industry, sustainability concerns among consumers have led to behavioral changes. Although only 19% of US consumers avoid meat and dairy, plantbased food and drink launches are on the rise, with drivers including environment concerns, health, diet and cost. In the last year to July 2021, 8% of global food launches featured a vegan claim, up from 5% of launches five years ago.

#### 34% of US pet food buyers\* say that real meat should be the first ingredient on pet food ingredient list

In comparison, global pet food launches with a **vegan claim make up under 1% of total launches**. Consumers see meat as too important to pets' diets to turn to a plant-based diet and prioritize pet food that includes real meat. Subsequently, pet food with plant-based protein appeals to just 18% of US pet food buyers.



BEEF, CHICKPEAS, MOLASSES, SUNFLOW SEA SALT, MIXED TOCOPHEROLS, ROSEM BŒUF, POIS CHICHES, MÉLASSE, LÉCITHINE SEL, MÉLANGE DE TOCOPHÉROLS, EXTRAIT	DE TOUNIDA					
BŒUF, POIS CHICHES, MÉLASSE, LÉCITHINE SEL, MÉLANGE DE TOCOPHÉROLS, EXTRAIT	DE TOURIERO					
	BŒUF, POIS CHICHES, MÉLASSE, LÉCITHINE DE TOUNUO, SEL, MÉLANGE DE TOCOPHÈROLS, EXTRAIT DE ROUNN					
GUARANTEED ANALYSIS / ANALYSE GRATE						
CRUDE PROTEIN / PROTÉINE BRUTE	H1323					
CRUDE FAT / MATIÈRE GRASSE BRUTE	101352					
CRUDE FIBER / FIBRE BRUTE	1.07					
MOISTURE / HUMIDITE	15%					

\*"When buying food/treats for your pet, which of the following factors have the greatest influence on your purchase decision? Base: 1,383 internet users aged 18+ who purchase dog or cat food/treats



