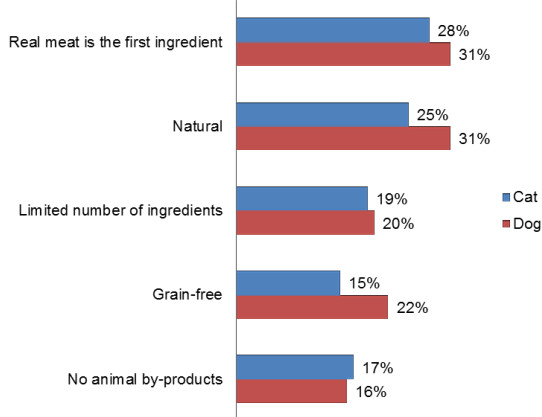


This section of the monthly update focuses on a specific food/drink category, aiming to provide you with an understanding of what's trending across new product introductions. This month's focus is: **Pet Food Products**

Pet owners are looking for natural, grain-free and 'real' meat in pet food

North America: pet food purchase factors, April 2017



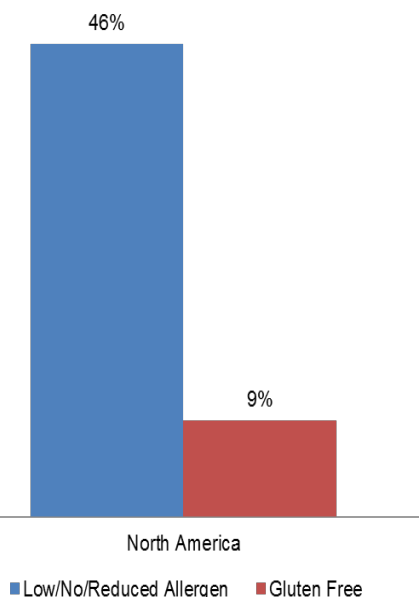
America's pet owners are expressing interest in more natural, less processed foods/ treats for their pets; a trend seen in human food products.

40% of adult pet owners in the US **check the ingredient list** when purchasing new pet food or treats.

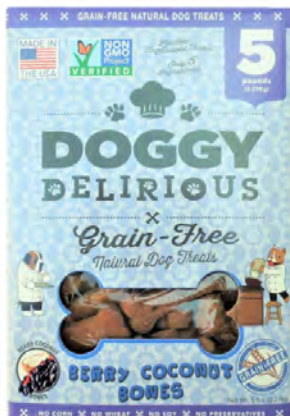
36% agree strongly that it is important to **feed my pet the highest quality food**, and 18% would be interested in human grade pet food

'Suitable for' claims are significant in North America

North America: 'Suitable for' claims as % of NPD in pet food, Mar 2017-Feb 2018



'Suitable for' claims account for 46% of NPD in pet food in North America. Gluten free and low/no/reduced allergen account for nearly all of the 'suitable for' claims; low/no reduced lactose and no animal ingredients also feature, but are niche at less than 0.5% of NPD.



Doggy Delirious Berry Coconut Bones Dog Treats is available in a limited edition flavour. These grain-free natural dog treats contain no corn, wheat, soy or preservatives. They are GMO free and made with only five ingredients which are meant for human consumption and locally sourced from sustainable suppliers. (USA)

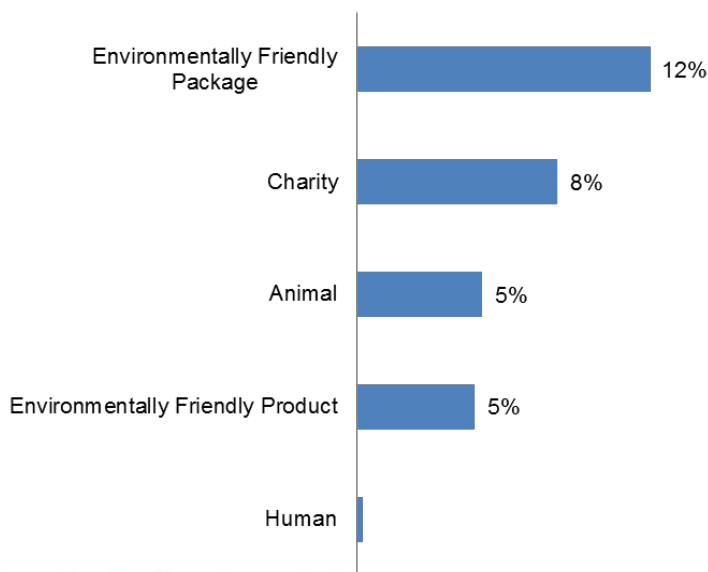
For more information, please contact
Tree Top at 509-698-1435



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Ethical - animal claims are growing in dog and cat food launches

North America: Ethical and environmental claims as % of NPD in pet food, Mar 2017-Feb 2018



Ethical claims are led by the environmentally friendly package claim, typically recyclable packaging. The charity claim is also significant in this category with many products donating to shelters, animal charities and pet associations.

Supporting animal related charitable causes is important to 66% of American pet owners, with **70% believing that adopting a shelter animal is the best way to acquire a pet.**



Zuke's Puppy Naturals Pork with Bacon Recipe Tender Dog Treats



Rachael Ray Nutrish Real Chicken & Brown Rice Recipe Super Premium Cat Food



Wellness Natural Hairball Control Chicken Meal & Rice Recipe Natural Food for Adult Cats

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 pet 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, September 2017-August 2018



Rachael Ray Nutrish Indoor Complete Chicken with Lentils & Salmon Dry Cat Food is described as super premium food for cats and is said to be made with simple, natural ingredients with added vitamins, minerals and taurine and has real US farm-raised chicken as the first ingredient.

Ingredients on pack:

chicken, chicken meal, corn gluten meal, dried ground peas, lentils, pea protein, poultry fat (preserved) (mixed tocopherols), dried plain beet pulp, powdered cellulose, salmon, ground rice, natural flavor, salt, choline chloride, iron oxide (color), taurine, **dried cranberry, dried blueberry, dried pumpkin**, vitamin E supplement, zinc sulfate, ferrous sulfate, calcium carbonate, niacin, L-ascorbyl-2-polyphosphate (source of vitamin C), dandelion, manganese sulfate, copper sulfate, vitamin A supplement, thiamin mononitrate, d-calcium pantothenate, sodium selenite, riboflavin supplement, pyridoxine hydrochloride (source of vitamin B6), biotin, menadione sodium bisulfite complex (source of vitamin K activity), vitamin B12 supplement, folic acid, vitamin D3 supplement, cobalt sulfate, potassium iodide

% of North America pet food products with fruit listed as an ingredient, by 10 top growing fruit ingredients, September 2016-August 2018

Emerging Fruit Ingredients	% change:	
	August 2016-July 2017 vs August 2017-July 2018	Total Sample
Lime Juice	221%	1%
Apple Fibre	144%	6%
Blueberry Pomace	114%	2%
Cherry	114%	1%
Fruit Juice	37%	4%
Cranberry	11%	57%
Pomegranate	7%	4%
Citrus Pulp	7%	1%
Avocado	7%	1%
Carob	7%	1%

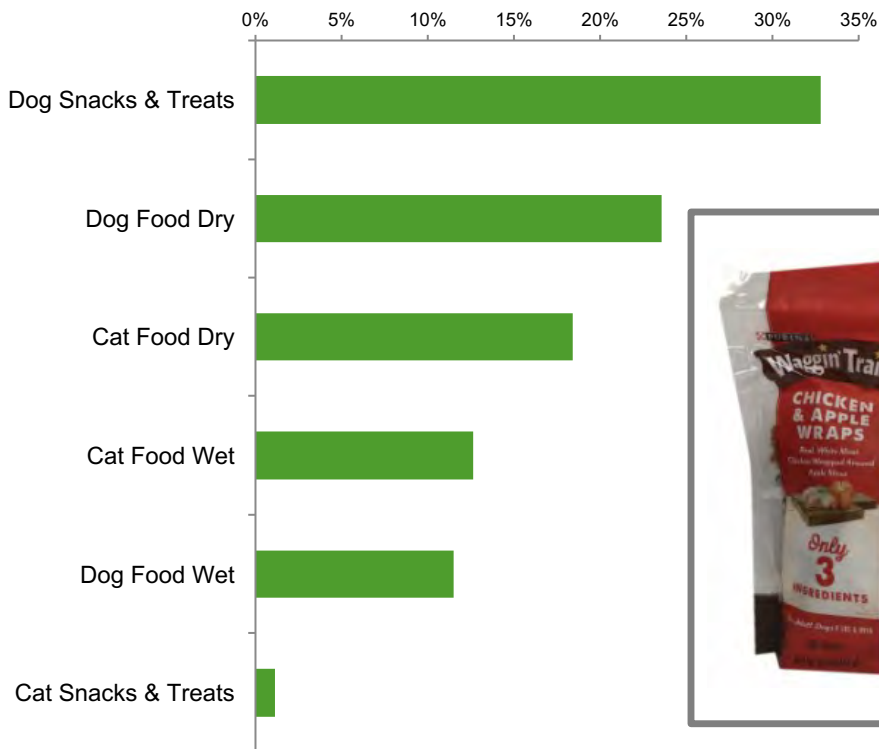
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This section of the monthly update keeps you informed on what's happening in fruit, focusing on popular and growing fruit ingredients being seen among pet products launched in North America.

Most Active & Top Growing Categories with Fruit Ingredients

% of North America pet food products with fruit listed as an ingredient, by 20 most active sub-categories, September 2017-August 2018



Purina Waggin' Train Chicken & Apple Wraps Dog is described as real, white meat chicken wrapped around apple slices, and contains only three ingredients with white meat chicken being the number one ingredient.

Ingredients on pack:
chicken, apple, vegetable glycerin

% of North America pet food products with fruit listed as an ingredient, by 10 top growing sub-categories, September 2016-August 2018

Emerging Sub-categories with Fruit Ingredients	% change: August 2016-July 2017 vs August 2017-July 2018	Total Sample
Cat Food Dry	211%	12%
Cat Food Wet	31%	11%
Dog Snacks & Treats	27%	29%
Cat Snacks & Treats	7%	1%
Dog Food Dry	-16%	26%
Dog Food Wet	-61%	21%

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