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Trends in Pet Food June 2023



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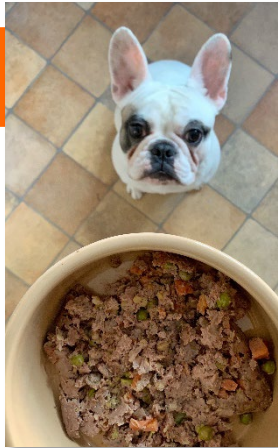
Pet Food Trends / June 2023

Where We Are Now

The humanisation of pets continues



- The tendency to humanise pets continues to impact trends in the pet food category.
- Consumers prioritise their pets, even during a cost-of-living crisis. In the UK, 63% of pet food buyers say that money concerns would make them more likely to cut back spending on their own food than food for their pet.



Keep it natural and nutritionally dense



- Pet brands are responding to consumer demand for nutritionally dense pet food by highlighting fibre, protein, vitamin and mineral content.
- Brands are also responding to consumer interest for all-natural pet foods, with pet owners expecting producers to reduce artificial additives and nasties from their recipes.

Focus on sustainability



- Planet-friendly claims continue to grow in pet food, despite sustainability being a low purchase driver among pet owners.





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Top Pet Food Flavors

Flavour (inc. blend) unordered	2022	2023	% change: 2022 - 2023	Total Sample
Chicken	12.93%	19.58%	51.51%	15.92%
Beef	10.54%	9.17%	-13.06%	9.93%
Unflavoured/Plain	6.8%	2.5%	-63.25%	4.87%
Peanut Butter	2.38%	2.92%	22.5%	2.62%
Bacon/Lardon/Pancetta/Speck	2.04%	2.08%	2.08%	2.06%
Salmon	1.36%	2.92%	114.38%	2.06%
Turkey	2.04%	1.25%	-38.75%	1.69%
Chicken & Vegetable	2.04%	0.83%	-59.17%	1.5%
Chicken & Jerky	1.7%	0.83%	-51.0%	1.31%
Pork	0.34%	2.08%	512.5%	1.12%
Chicken & Beef	0.68%	1.25%	83.75%	0.94%
Chicken & Sweet Potato/Kumara	1.02%	0.83%	-18.33%	0.94%
Pumpkin/Squash	1.02%	0.83%	-18.33%	0.94%
Blueberry	0.68%	1.25%	83.75%	0.94%
Sweet Potato/Kumara	0.68%	1.25%	83.75%	0.94%
Chicken & Liver	1.02%	0.83%	-18.33%	0.94%
Beef & Liver	0.34%	1.67%	390.0%	0.94%
Chicken & Rice (Brown)	0.68%	1.25%	83.75%	0.94%
Bacon/Lardon/Pancetta/Speck & Cheese	1.02%	0.42%	-59.17%	0.75%
Banana & Peanut Butter	1.36%	n/a	-100.0%	0.75%
Total Sample	100.0%	100.0%	n/a	100.0%



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Source: Mintel Global New Products Database (GNPD)





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Top New Pet Food Product Claims

Claim	2022	2023	Total Sample
No Additives/Preservatives	48.98%	46.25%	47.75%
Low/No/Reduced Allergen	48.3%	40.0%	44.57%
Free from Added/Artificial Flavourings	34.69%	33.75%	34.27%
Free from Added/Artificial Preservatives	35.37%	32.5%	34.08%
Free from Added/Artificial Colourings	28.91%	23.75%	26.59%
Vitamin/Mineral Fortified	21.77%	21.25%	21.54%
All Natural Product	21.09%	18.75%	20.04%
Social Media	23.13%	15.83%	19.85%
Pet - Adult	19.05%	20.42%	19.66%
Functional Pet - Teeth & Tartar Prevention	19.39%	19.58%	19.48%
Total Sample	100.0%	100.0%	100.0%

Naturally healthy food in demand

Pet owners focus heavily on the healthfulness of the foods they feed their pets. In the UK, 60% of pet food buyers decide whether or not to purchase pet food based on how healthy it is. It makes commercial sense to focus on health, too; 79% of US pet food buyers think that it is **worth paying more for healthier pet food**.

The humanization of pets continues to drive consumer attitudes. The perception that natural food and drink products for humans are healthy has perhaps unsurprisingly translated to pet food. Indeed, 45% of Brazilian pet owners prefer to **buy pet food that is free from artificial ingredients because it is healthier** for their pet.

Over the past decade, the global pet food industry has responded to consumer demand and steadily increased its focus on natural launches.

79%

of US pet food buyers think that it is worth paying more for healthier pet food.



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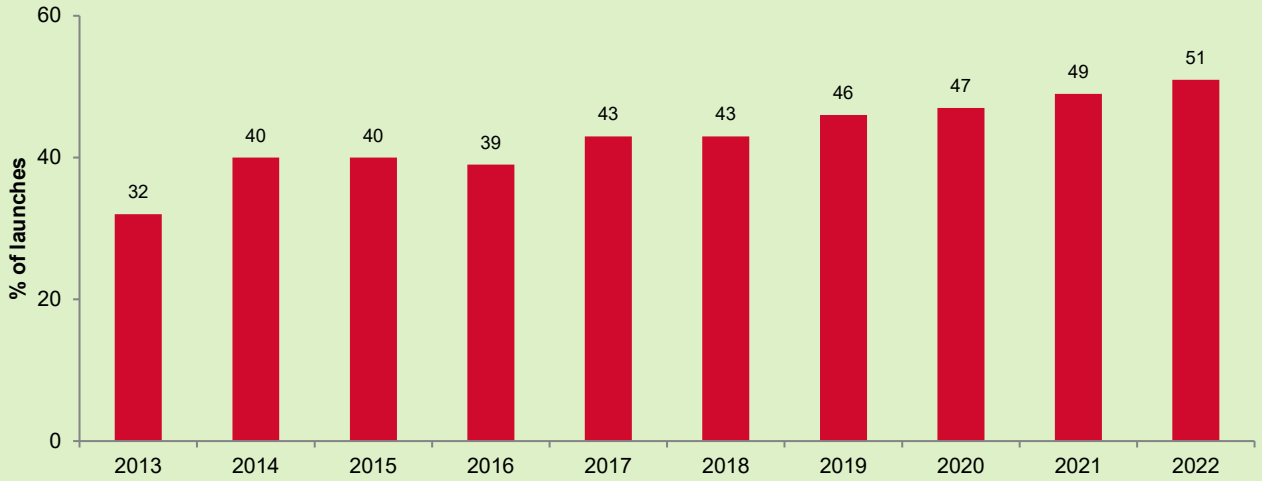
Source: Mintel Global New Products Database (GNPD)





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Global: pet food launches featuring a natural category claim*, by year, 2013-22



Pet brands are positioning treats as convenient nutrition boosters

Pet owners are seeking out natural options

Many pet owners consider their status as 'pet parents' to be an important part of their personal identity. As such, many owners seek pet food that embodies the same values that they look for in the food they buy for themselves and their families.

The increasing scrutiny consumers are placing on their food purchases is driving expectations for less processed and more natural pet food options.

With naturalness high on pet owners' radars, pet food brands are ensuring their products are additive and preservative free. Additionally, companies are seeking to meet the increasingly sophisticated needs of the pet owner with recipes that have more holistic natural credentials, such all-natural product and organic ingredient claims.



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Source: Mintel Global New Products Database (GNPD)

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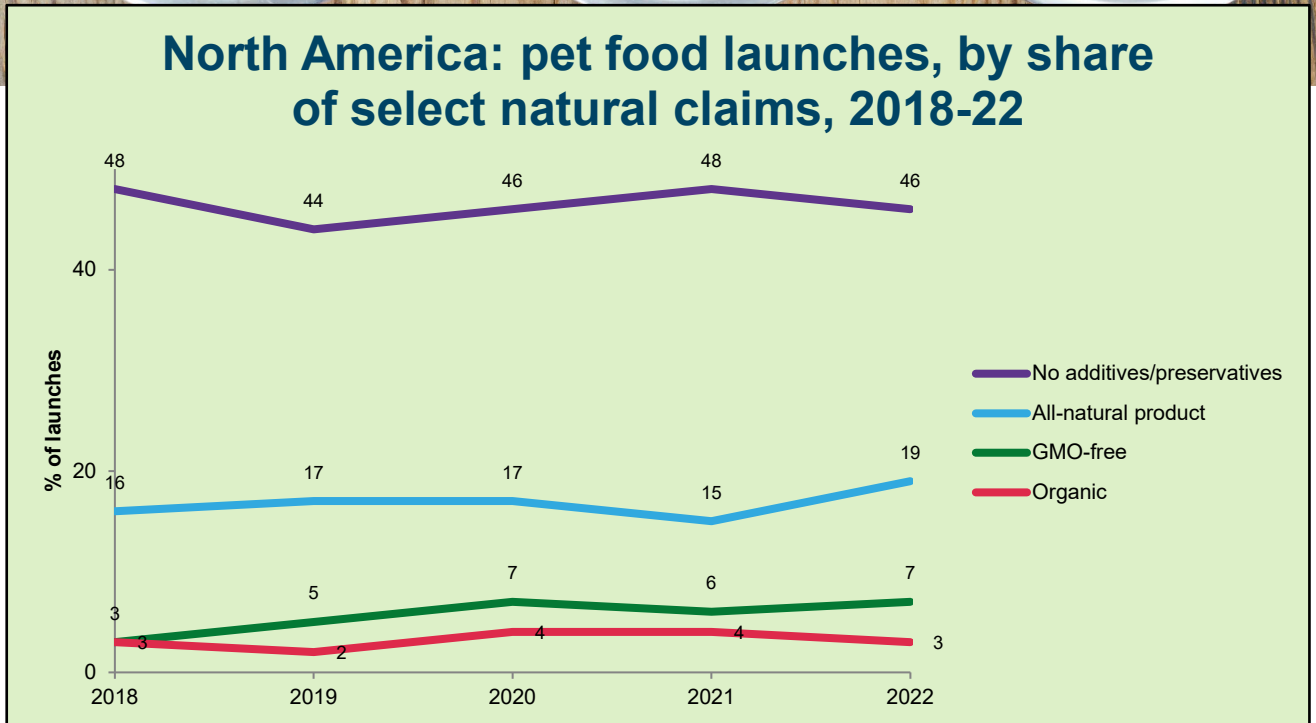
All-natural
Pet Food

38%

of pet owners in the US are looking for all-natural pet foods.



North America: pet food launches, by share of select natural claims, 2018-22



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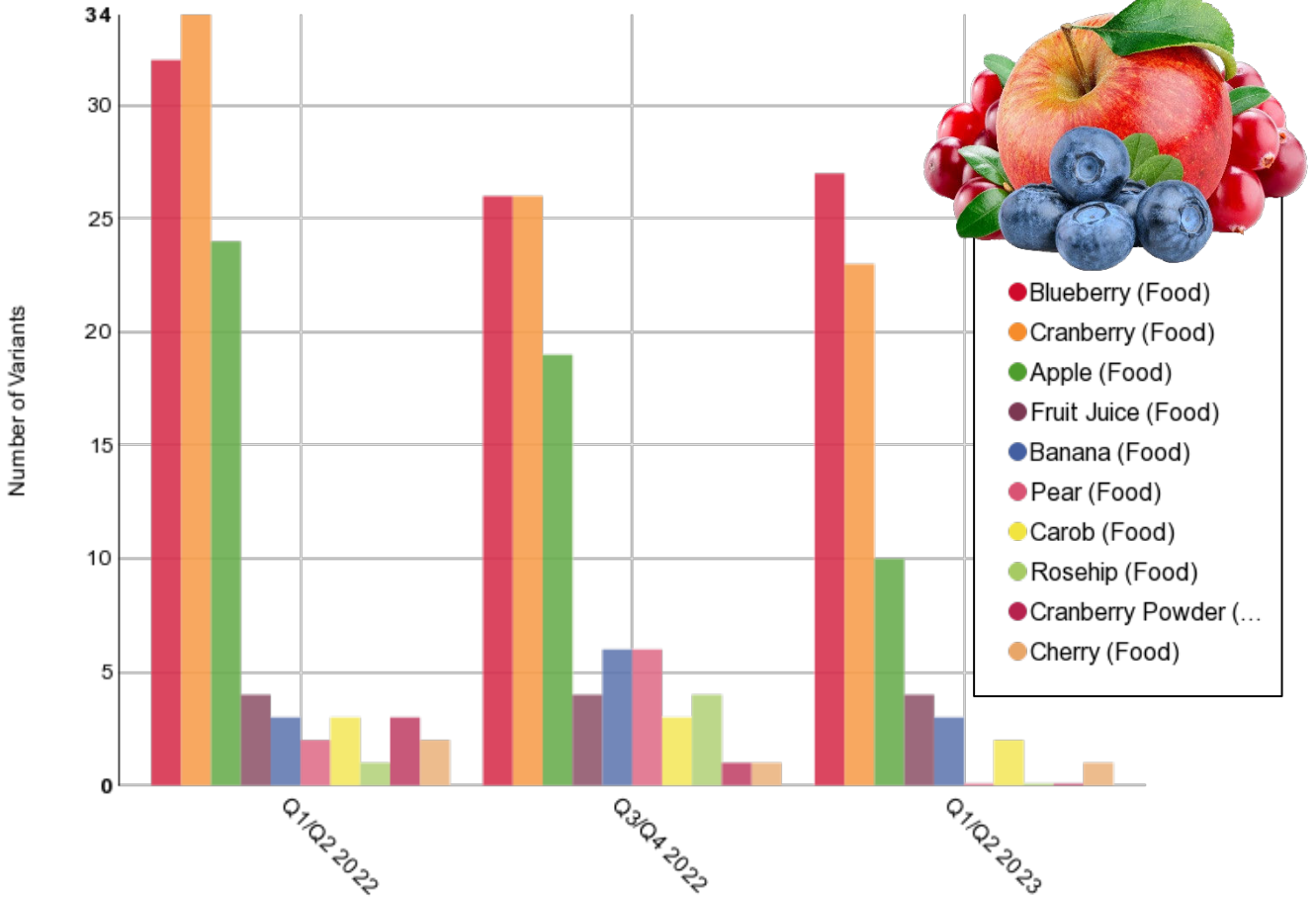
Source: Mintel Global New Products Database (GNPD)





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Top Fruit Ingredients in New Pet Food Product Introductions



Pet owners are looking for snacks with functional benefits

To address possible nutrient deficiencies, snack and treat brands are stepping up with options that pack a punch through nutritional and functional benefits. Companies are offering snacks and treats in convenient and easy-to-feed formats like drinks and chews, as well as ones that address a broad spectrum of functional needs, such as digestion or heart and cardiovascular support.



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Young pet owners are turning to homemade options



Many young consumers are treating their pets like children. As a result, they are more open than older consumers to making pet food from scratch, just as they might for human family members.

Health remains a focus; in the US, over half (51%) of pet food buyers perceive freshly prepared food to be healthier than store-bought food.

Companies should advise consumers keen on feeding their pets homemade food on how best to meet the nutritional needs of their pet.

Pet owners will therefore find nutritional mixes appealing. Dog Child offers such mixes that can be added to cooked protein. Dr. Harvey's offers raw food premixes, to which consumers can add raw meat.

Dog Child's meal mixes allow owners to cook food at home (Canada)

Companies can even develop specific appliances. US-based startup Artie provides a highly nutritious blend of freeze-dried and dehydrated meat, fruits, vegetables and grains. Each meal can be prepared at home through the Artie countertop appliance.

Humans place greater importance on the pets in their lives, and will accordingly seek to offer them better experiences. At home, pet owners will focus on improving their pet's mealtimes. Pet food designed to be heated will appeal to owners who already add warm water to food for palatability.



Artie provides artisan-inspired home-cooked meals for pets (US)

Too Much
Choice

54%

of US pet food buyers say that too many options makes it difficult to choose the right food for their pet



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Minimalist Messaging: keep it simple to connect with tired pet owners

Mintel Trend Driver: *Value*

Packaging communication has long been gaining complexity as companies strive to share every selling point of the product with consumers. However, access to so much information is overwhelming, and consumers are fatigued by the sheer amount of choice available.

Simplifying pet food packaging to enable pet owners to select the best option for their pet will be paramount. Indeed, 34% of German consumers consider products that make a lot of health claims to be less trustworthy than those that claim only a few specific benefits.

Pet food buyers will gravitate towards brands that highlight how their products align with their top priorities, such as digestion, muscle, bone and joint support, and skin health.



Bocce's Strawberry Shortcake Recipe All-Natural Dog Treats

Soft and chewy, Peanut Butter and Strawberry Flavor, Wheat-free, 100% Real Ingredients, Better Food with Fresher, Simpler, All-natural Ingredients, Baked in the USA



Trader Joe's Turkey & Cranberry Recipe Cat Treats

For Christmas 2022, No Added Grain, Perfectly Soft and Chewy



Fruitables Pumpkin SuperBlend Digestive Supplement for Dog and Cat
Vitamins and Fiber, Gluten-free, Vet Developed, Supports Healthy Stool Quality, Supports a Healthy Tummy, Works Quickly to Support a Healthy GI Tract



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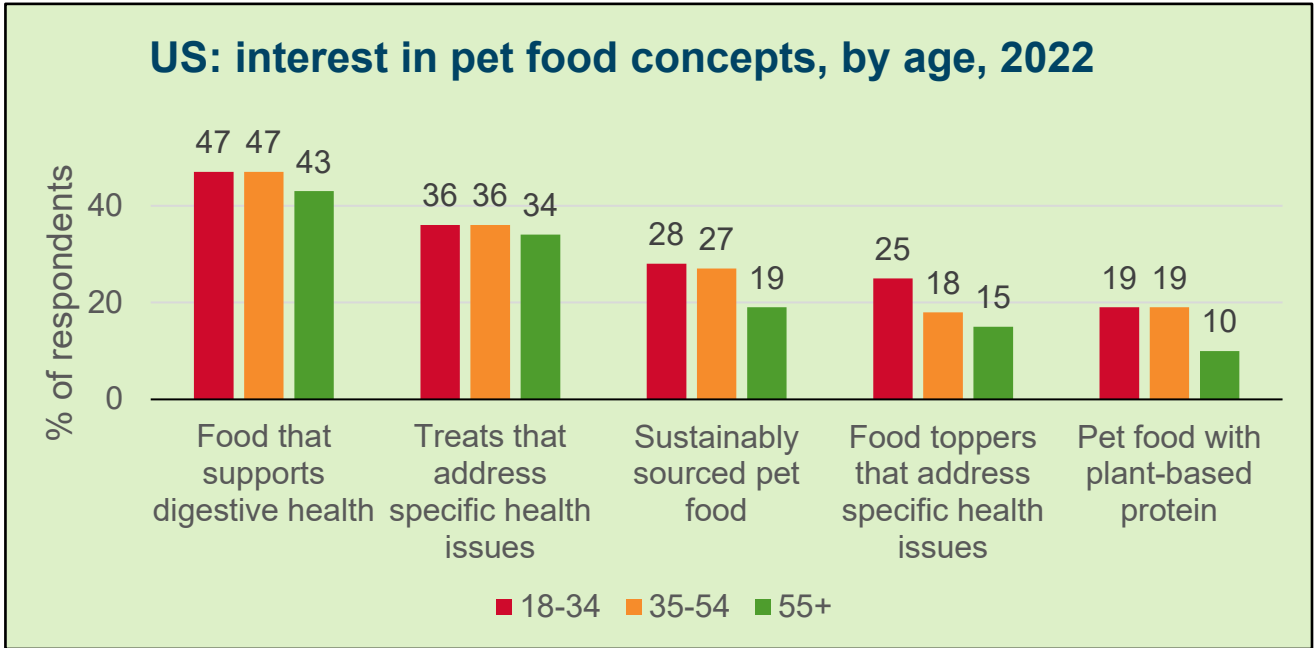


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Interest in plant-based pet food is stronger among younger pet owners

Interest in plant-based protein in pet food is modest overall, but is strongest among younger pet owners, suggesting the potential for interest to grow over time.

Pet owners aged 18-34 are also more likely than their older counterparts to place importance on pet products that address specific health issues and that feature sustainable sourcing, pointing to the opportunity for pet food with plant-based protein to align with pet owners' broader needs.



Base: US: 1,463 internet users aged 18+ who purchase pet food/treats Source: Kantar Profiles/Mintel, April 2022



Clif Pet Butternut Squash & Cranberry Recipe Plant Based Jerky is said to be great for pets as well as the environment. This product is made in the USA with only seven globally sourced ingredients including plant protein.



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Source: Mintel Global New Products Database (GNPD)



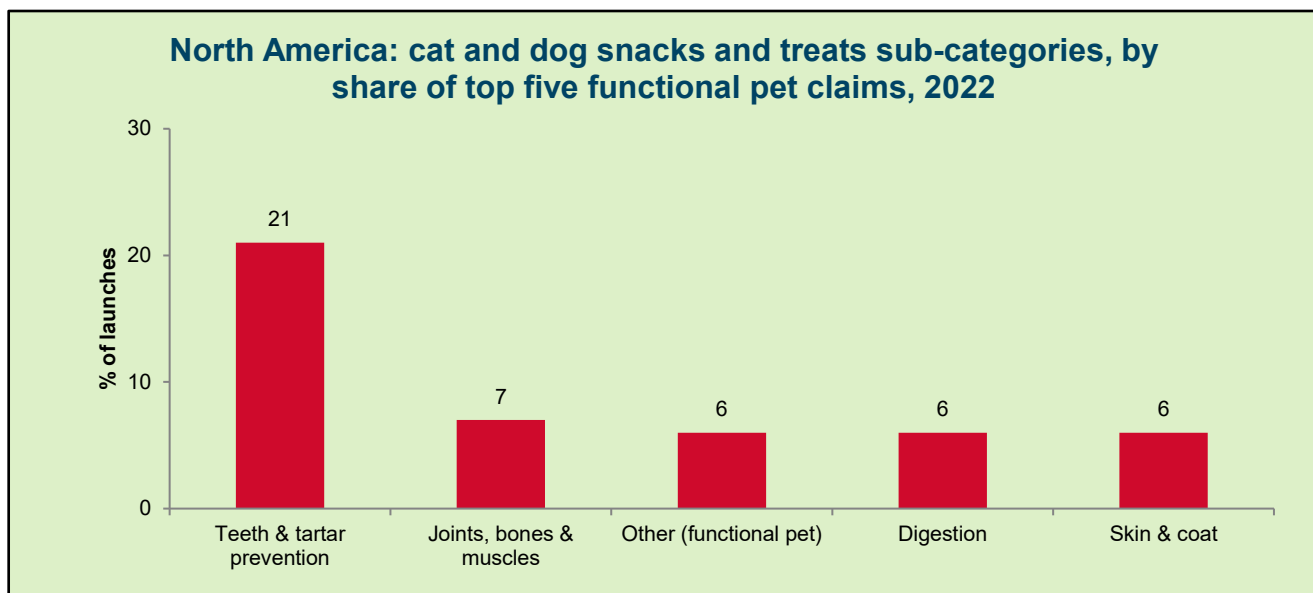


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Teeth and tartar prevention leads functional pet claims

Teeth and tartar prevention dominates functional pet claims in both the dog and cat snacks and treats sub-category, with other functional claims more established in the dog treats category.

More niche functional pet claims such as immune system, heart and cardiovascular and brain and nervous system claims have all seen growth over the last five years, albeit from a low base.



Source: Mintel GNPD, January 2022-December 2022



Wolf Spring Canine Wellness Adult Dog Food Booster is made with natural ingredients and contains electrolytes, potassium, glucosamine, inulin and omega-3. Also available in puppy and senior variants



VetIQ 5-In-One Multi-Benefit Soft Chew for Dogs are described as hickory-smoke-flavoured soft chews that help to support hips and joints, urinary tract, immune system, skin health and heart health (US).



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