



MINTEL

# What human food trends mean for treats & toppers

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# Agenda

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**Why we should look at human trends for pet food**



**Human trend: Health & wellness**



**Human trend: Indulgence**



**A cautionary tail regarding human trends and pet food**



**Final thoughts**

# Why look at human trends?

- Our pets are our friends and children.
- It becomes an easy and simple way to communicate differentiation.
- And why treats & toppers? They are easy (lower cost) ways to experiment and try something different. In that sense, they are like snacks for humans.



Meet: Martin

# We REALLY care about our pets

**51%**

US consumers say they worry about their pet when they are away.

**50%**

Say their pet is like their best friend.

**49%**

Say their pet is like their child.

**35%**

Say they would like to spend more time with their pet.



# We like to give our pets treats

**56%**

US consumers say they give their pets treats daily.

**21%**

Say they sometimes give their pets treats because they feel guilty about not giving them enough attention.

**“Wholesome ingredients,” looks like an Oreo**



Three Dog Bakery Lick'n Crunch! Carob & Peanut Butter Flavors Sandwich Cremes Treats for Dogs, US

**Natural, simple treat that comes with an interactive toy**

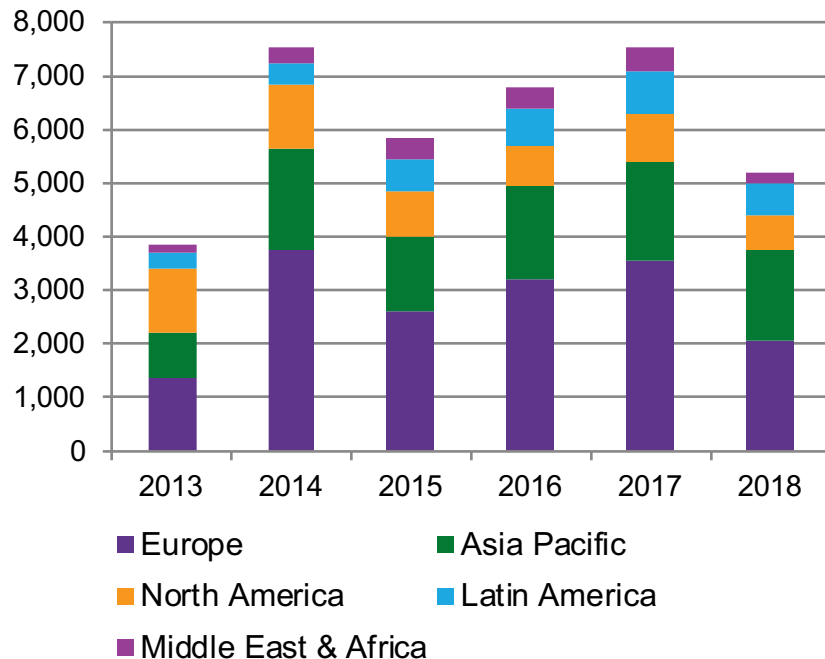


Nestle's Purina Friskies Pull'n Play Play Pack Cat Treats, US

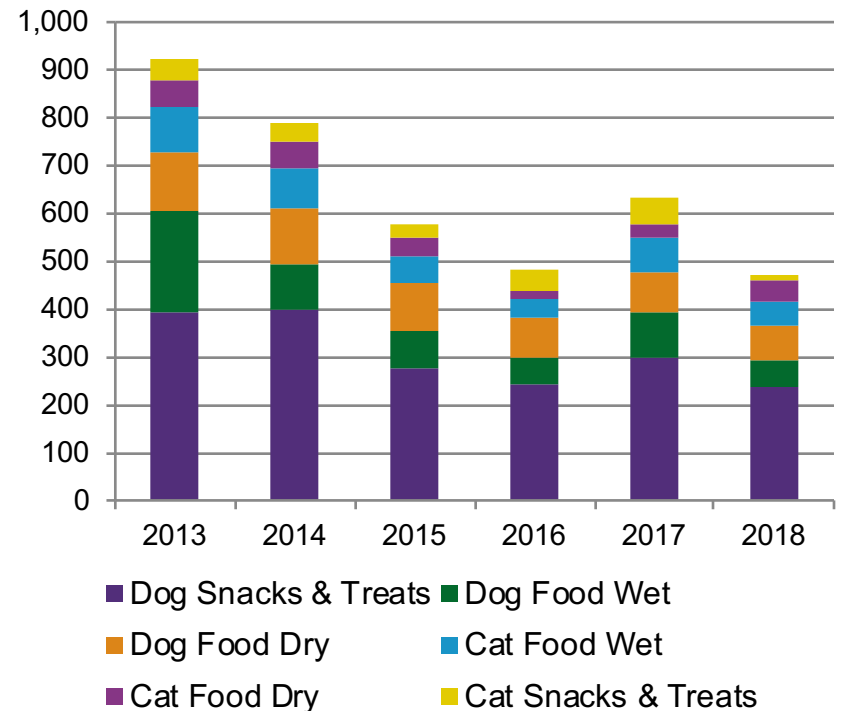
# Dogs have more treats to choose from

The North American market has slowed its rate of innovation, but dog snacks & treats continue strong over time.

### Global pet food and treat introductions, by region, 2013-Sept 2018



### US pet food and treat introductions, 2013-Sept 2018





## Human trend: Health & wellness

Health & wellness trends for humans today center around:

- Simple ingredients
- “Clean” formulations
- Fortification (positive nutrition)
- Provenance

Why? Consumers are skeptical about what is in their food, and these “simple” values reassure them.

These trends are echoed quite clearly in pet food, and in treats and toppers.



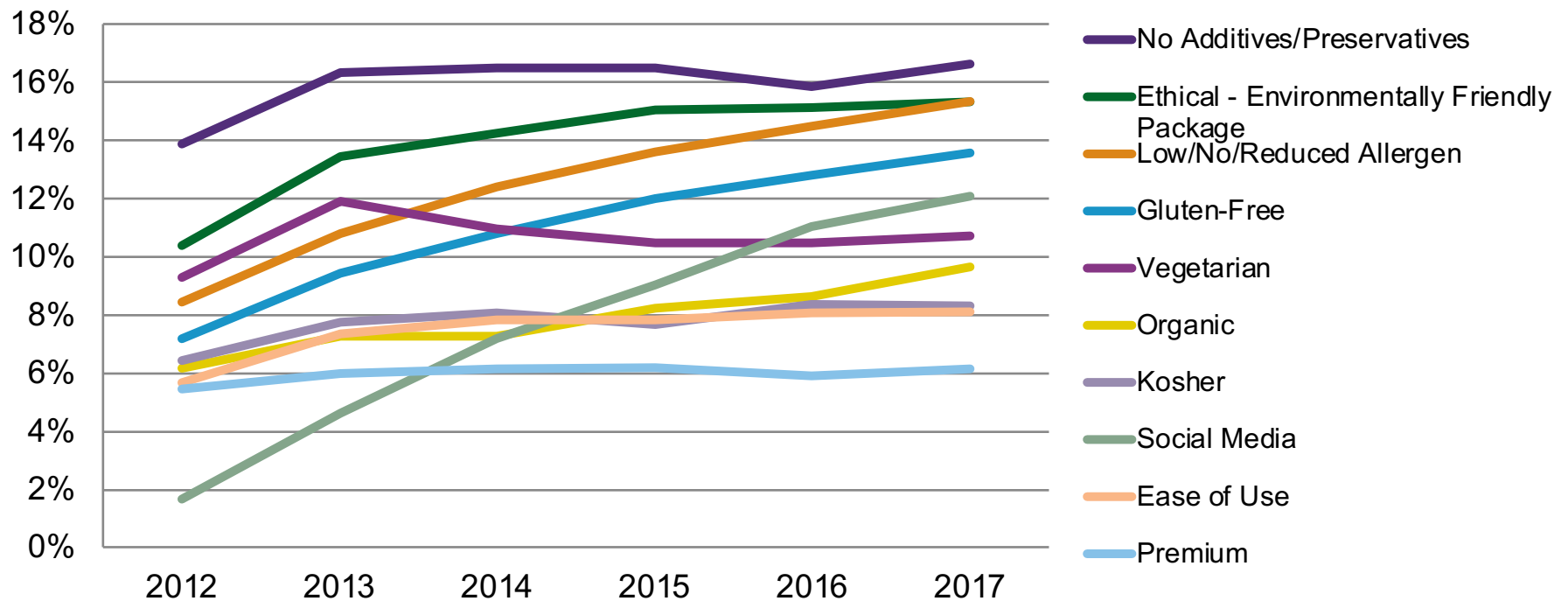
Meet: Kiki



# Human trend: Health-focused claims on the rise

The most common health-focused claims on food and beverage products, globally, include several types of claims: free from, low-in, and claims that form the historic backbone of health and wellness. Most of the claims have shown increases. However, the picture is very different when looking at specific regions or countries.

## Global new product introductions, most prevalent health-focused claims, 2012-2017





# Globally, consumers look for what's not in a product

Free-from claims abound, keeping pace with growing consumer demand for food and drink items that do not contain particular allergens, ingredients, or additives.

**30%**

of adults in Brazil say they would like to see a wider range of healthy bread and baked good products available - —not just “light” and “organic,” but also “gluten-free,” “lactose-free,” with collagen, etc.

**32% & 60%**

32% of consumers in China said that when purchasing milk for themselves, they look for low/no lactose; while 60% look for it when purchasing milk for the elderly

**54%**

Low sugar is seen as the most important factor for consumers in the UK looking for healthy food, cited by 54% of adults

# For pets: Consumers look for “real” and “authentic” values

**39%** of US consumers say a purchase factor for pet food is that real meat is the first ingredient.

**Chicken and eggs as first two ingredients (plus mussels and kelp!)**



K9 Natural New Zealand Cage-Free Chicken Feast Dog Food. New Zealand

**Contains only one ingredient**



Mars Petcare's Cesar Simply Crafted Chicken Canine Cuisine Complement in Natural Juices, US

**Easy to see just what is in the package**



Nestle Purina Petcare's Purina Purely Fancy Feast Natural Ocean Fish Fillet, US



# They also look for limited ingredients, organic, natural

**27%** of consumers say they look for pet food and treats with a limited number of ingredients, while **37%** look for all natural, and **18%** for organic.

**Grass-fed beef,  
naturally high in  
protein**



Newman's Own Original Recipe Beef Jerky, US

**Only four ingredients**



Priority Pet Products K9 Cookhouse Sweet Potato Duck Jerky, US

**“100% natural petfood”  
meal also positioned  
as a topper**



Forthglade Beef & Wild Boar with Root Vegetables & Apple Gourmet Complete Meal, UK

# Super foods and plant protein continue to appear

**26%** of consumers look for treats with superfood ingredients, while **20%** look for treats with plant protein.

## Flaxseed



Don't Forget About Me  
Peanut Butter & Banana  
Crunch with Flaxseed All  
Natural Dog Treat, US

## Cranberry powder and dried blueberries



Vetreska Woofshake  
Nutritious Milkshake with  
Forest Berries for Pets,  
China

## Pumpkin puree as a pet food topper



Simply Nourish Merry  
Meals Pumpkin Purée  
Tasty Topper Dog Food  
Supplement, Canada

# Consumers often look to treats for functional benefits

**52%**

US consumers say they look for treats that provide added nutrition.

**35%**

Say they look for treats that help maintain cognitive function.

The most common benefit in treats relates to joint health and mobility; other functional benefits tend to appear more in dog and cat food.

With glucosamine and chondroitin



Heritage Ranch by H-E-B  
Mobility Blend Salmon  
Jerky Recipe Dog Treats,  
US

With omega-3 to support brain function



VetIQ Multi Vitamin  
Chicken Flavor Soft Chews  
for Dog, US



## Human trend: Indulgence

Just as with human food, the most important factor regarding purchase of pet food and treats: That the pet likes the flavor.

Concept of “permissible indulgence” in human food

- Indulgent but with added benefits (e.g. fortification)
- Indulgent, but in a smaller size

In pet food, this translates clearly to treats and toppers, and also to products positioned as multi-purpose.



Meet: Lola, Leo, and Zumba

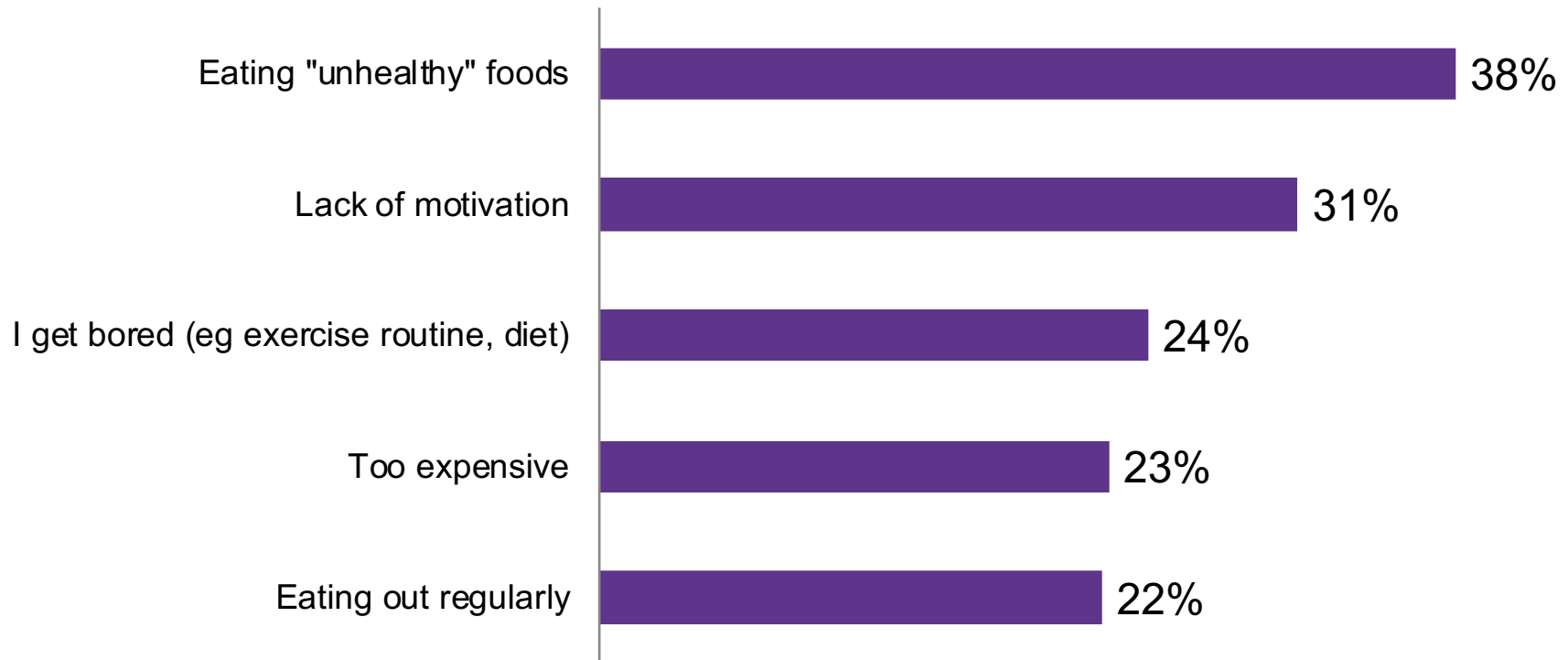




# US consumers find it challenging to live a healthy lifestyle

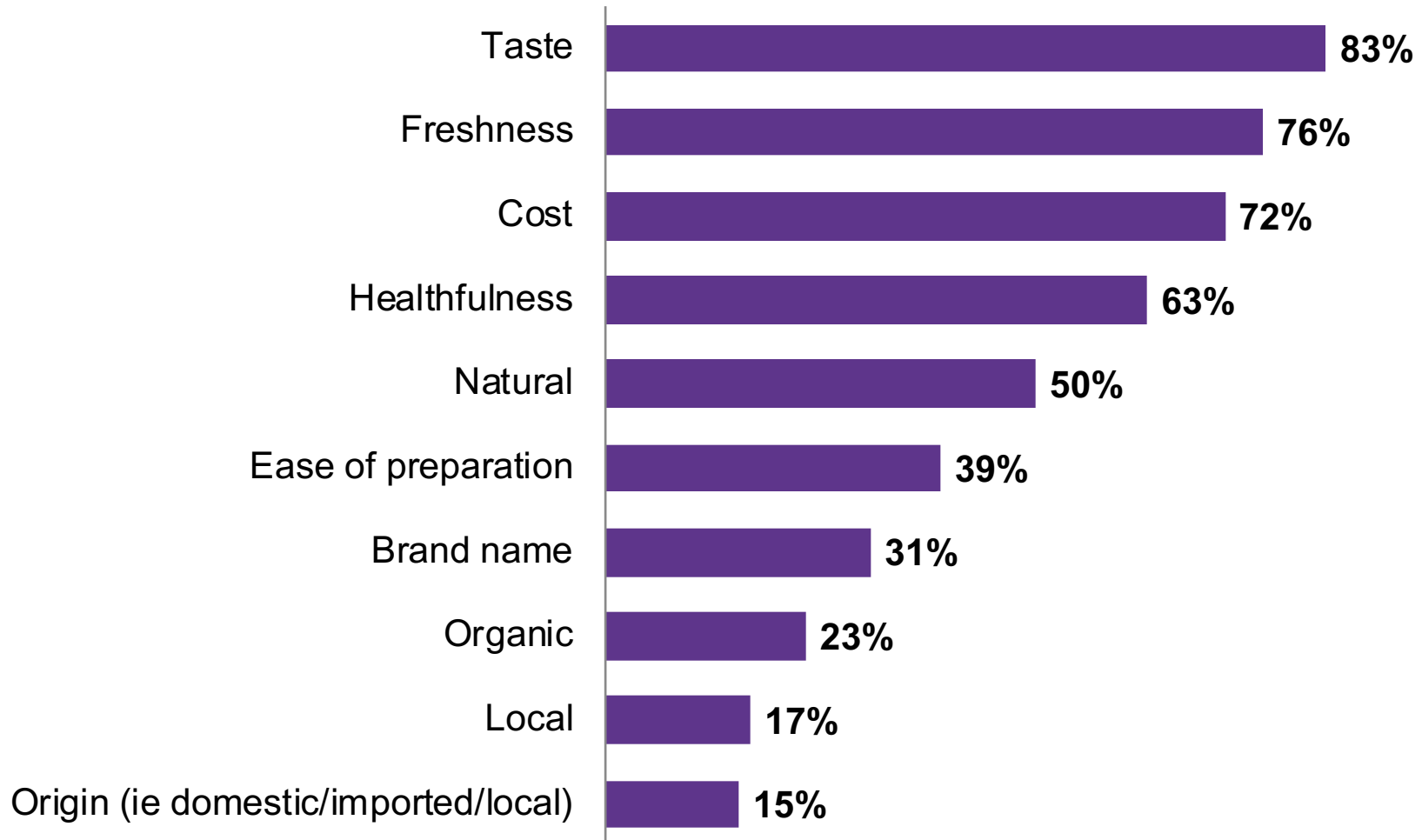
Dieting and a healthy lifestyle are difficult for most consumers to maintain. The lure of “unhealthy” foods is strong, as is keeping motivation strong. This leaves room for indulgent treats.

Top challenges in living a healthy lifestyle, USA



# For humans: Taste (always) the over-riding factor

## Priorities for food shopping, US, April 2016



# Permissibility: Indulgence as a small treat

**Individual unwrapped candies, with a flavanol message**



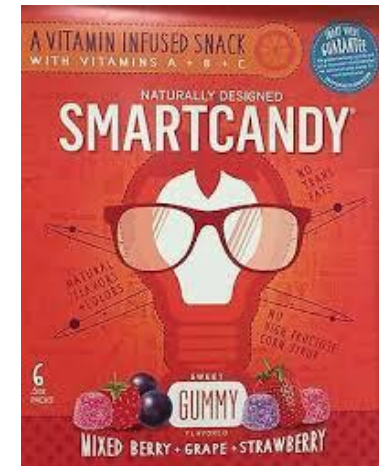
Russell Stover Coconut Minis, USA, are unwrapped coconut bites covered in dark chocolate

**Not the usual trail mix: It contains chicken, nuts, chocolate**



Oberto Teriyaki Chicken Trail Mix, USA, a combination of teriyaki chicken breast, nuts, seeds, dried fruit and dark chocolate

**Good source of vitamins, single serve size**



Snap Infusion's Smartcandy, USA, made with no additives or preservatives, in multipacks of single servings

# Pet food purchase driver the same as for human food: FLAVOR

**44%** of US consumers say the factor that is most likely to drive purchase for pet food and treats is that their pet likes the flavor.

**Beef and pork hide wrapped with chicken and duck**



United Pet Group's Healthy Hide Good 'n' Fun Triple Flavor Kabobs Gourmet Dog Treats, US

**Made from yak and cow's milks**



Pawluxury Yak Cheese Chew, US

**Designed to add flavor to medical foods**



Thrive ProTaste 100% Chicken Food Topper for Cats, UK



# Small treats answer the need for a permissible indulgence

“Ice cream” for dogs in individual cups



J&J Snack Food's Dogsters Mintë Kissably Fresh Flavor Ice Cream Style Treats for Dogs, US

Intended to “add flavorful protein” to a dog’s diet



Loblaws PC President's Choice Nutrition First Freeze-Dried Salmon Dog Treat, Canada

For an added flavor boost for dry or wet food



Wainwright's Dog's Best Friend Grain Free Venison Sprinkles, UK

# Multi-function products allow pets to get a treat in a new way

Freeze-dried raw food  
to be reconstituted as a  
meal or topper



The New Zealand Natural  
Pet Food Co Woof Wild  
Brushtail Freeze Dried Dog  
Food, New Zealand

Thick puree for hand  
feeding or as a meal



Hartz Mountain's  
Delectables Squeeze Up  
Tuna Flavored Cat Treat,  
US

“Soup” for dogs (no  
onions!)



SN Pet Holdings' Bark  
Broth Beef Broth Dog Food  
Topper, US

## A cautionary tail regarding human trends and pets

When can humanization go a bit too far? When consumers forget that pets are not actually tiny humans and have different nutritional needs.

Companies and consumers should exert caution regarding:

- Vegan or vegetarian foods, especially for cats
- Made from scratch pet food without the needed added nutrients

A look at a few vegan products, plus a few complete oddballs in treats and toppers, just for fun.



Meet: Scout

# Vegan or vegetarian products usually appear as treats

Contains no wheat,  
soy, corn, or gluten



Foufou Brands Vegalicious  
Sweet Potato Fries, US

For pets hyper  
sensitive to chemical  
residues in food



Sanypet Forza10 BioLogic  
Organic Vegetable Food  
for Cats, France

Developed with pet  
nutritionists to ensure  
it is nutrient complete



Halo Holistic Garden of  
Vegan Recipe Vegan Adult  
Dog Food, Canada



# For products that are just like “made from scratch”

Chicken dinner for dogs, sold chilled



Freshpet Select Roasted Meals Tender Chicken Recipe with Garden Vegetables Adult Dog Food, US

Make-your-own dog treats



Three Dog Bakery Vanilla Flavor Cake Mix, US

# Does humanization sometimes go a little too far?

## Anthropomorphic package



Mars Whiskas Duolicious Adult Cat Snack with Chicken and Yogurt, Belgium

## Advent calendar, but for cats



Tesco Advent Calendar for Cats with Treats, UK

## Halloween treats for dogs



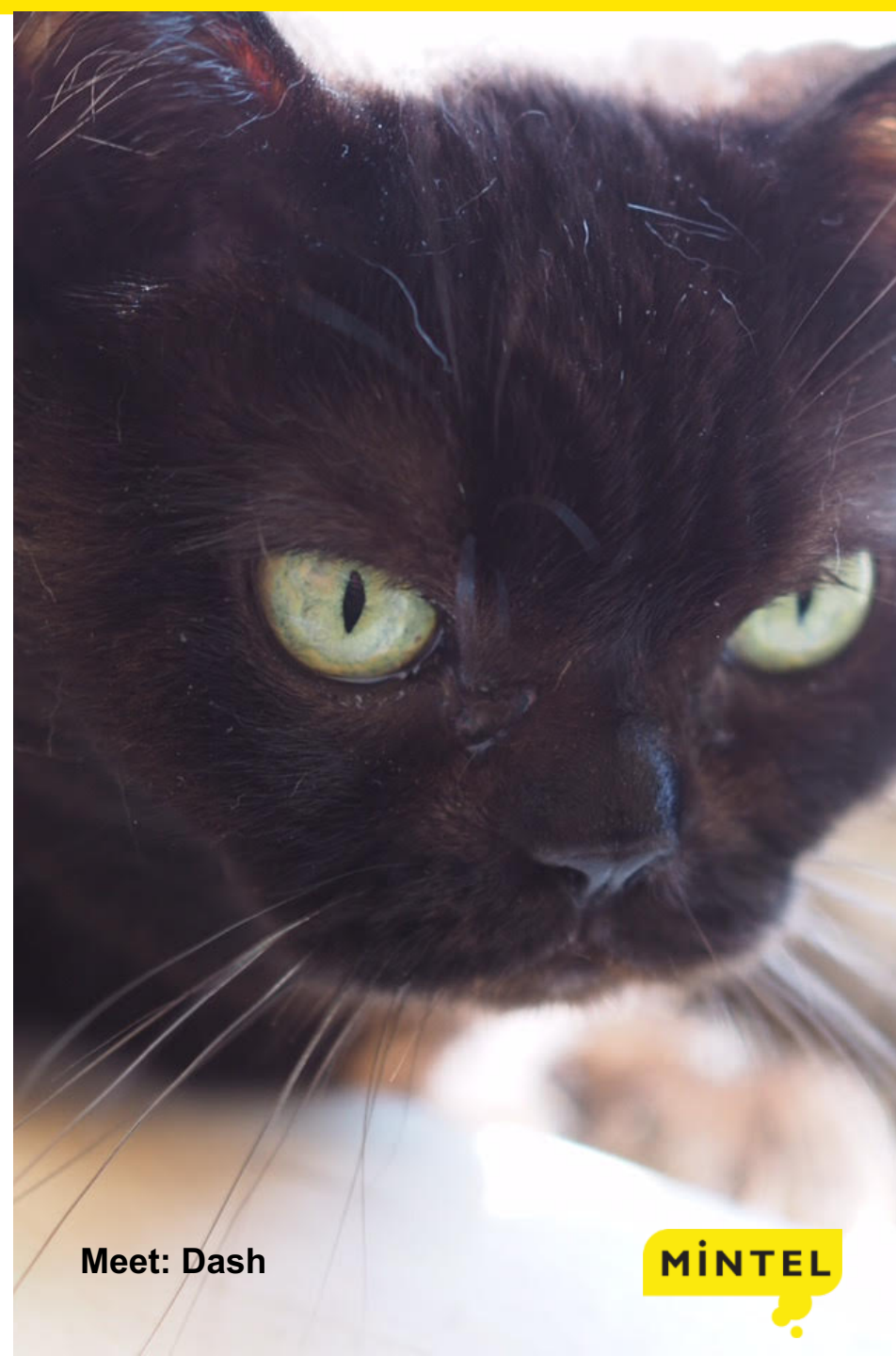
Blue Buffalo's Blue Boo Bars Mummy Morsels Crunchy Dog Biscuits Baked with Pumpkin & Cinnamon, US

## Final thoughts

We will always treat our pets like our family members, so products for them that echo human foods and trends will continue to be important.

Treats and toppers play a vital role with pets and their owners, beyond just the nutrition they provide:

- Engagement and care
- Time
- Sense of family



Meet: Dash



# Thank you



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