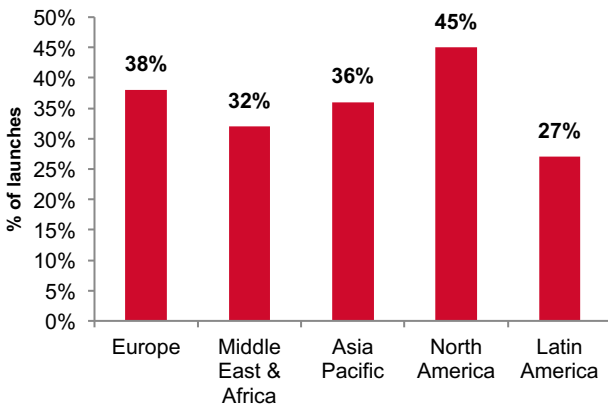


This section of the monthly update focuses on a specific food/drink category, aiming to provide you with an understanding of what's trending across new product introductions. This month's focus is: **Sweet & Savory Spreads**.

Natural & GMO free stand out among sweet & savory spreads

Natural claims account for 45% of spreads launches in North America in the 12 months to April 2018 - higher than that seen in other regions. Natural claims in North America especially focus on GMO-free (24% vs 5% globally), no additives/ preservatives (21% vs 18%) and organic (14% vs 16%).

Global: natural claims as a % of NPD in sweet and savory spreads, May 2017-Apr 2018



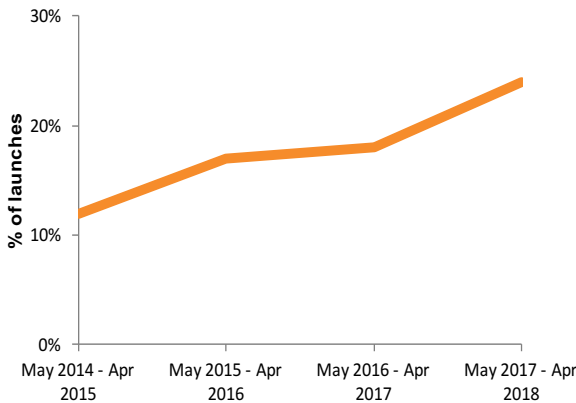
World of Chia Chia Raspberry Fruit Spread is vegan-friendly and made with chia seeds instead of pectin. It is free of gluten, synthetic acids, pectin and GMOs (Canada)



Artie's Harvest Blackberry Jam is an all natural jam made in small batches from Pacific Northwest fruit grown by local Oregon farmers. The company claims to support local farmers and supports the Two Feet Project (USA)

GMO-free is a standout claim in sweet and savory spreads, growing by 12 percentage points over 2014-18 - and the leading natural claim. The claim has seen particular growth in the dips sub-category, rising from 7% of launches in 2014-15 to 32% in the latest review period.

North America: GMO-free claims as a % of NPD in sweet and savoury spreads, May 2014-Apr 2018



Habibi's Mediterranean Thai Chili Flavoured Cashew Dip & Spread is free from gluten and GMOs and is also kosher and suitable for vegans (Canada)



Dip by Cindy's Kitchen Salsa de Molcajete is a small batch product described as extra smooth, with a medium spice level, and free from GMO, gluten, dairy and soy (USA)

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



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Some cold-pressed hummus inspired by cold-pressed juices...

Cold pressing is used in olive oils and juices and is claimed to retain the fibre and nutrients that are lost in pasteurisation. In the UK, 31% of fruit juice consumers think cold-pressed juices/smoothies taste better than standard ones, and 27% that they are more nutritious.



Ithaca Cold-Crafted is a range of dips which promotes the use of cold pressure instead of heat pasteurization to keep ingredients "raw, full of nutrients, and alive with flavor". The range is marketed as 100% natural, and made with cold-pressed lemon juice, fresh raw garlic and organic sunflower oil.

...while other hummus products are inspired by DIY trend

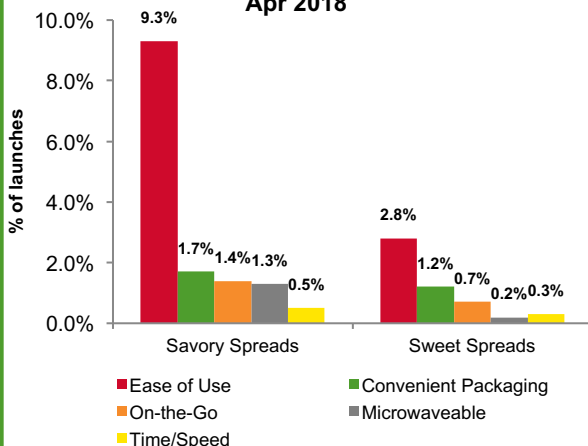


□ *Hummustir Fresh Hummus (USA) is marketed as "the freshest hummus in the market" and is available in a DIY format - "to make hummus in seconds".*

It comprises a tub storing three sachets of ingredients (chickpea puree, tahini and spices) which are combined and mixed in the tub. It is USDA organic-certified, free-from gluten, preservatives and GMOs and suitable for a vegan diet.

Convenience claims are most active in savory spreads

NA: convenience claims as a % of NPD in sweet and savory spreads, May 2017-Apr 2018



Convenient claims are most popular in the savoury spreads sub-category in North America, especially the ease of use claim. Promoting how products can be easy to spread, portion out, or consume out of the home especially appeals to busy modern lifestyles.

77% □ of consumers who buy spreads or dips consider them to be convenient and 68% to be an easy snack.



Lantana White Bean Hummus Singles available in individual, single-serve cups which make it easy for consumers to keep track of portion size (USA)

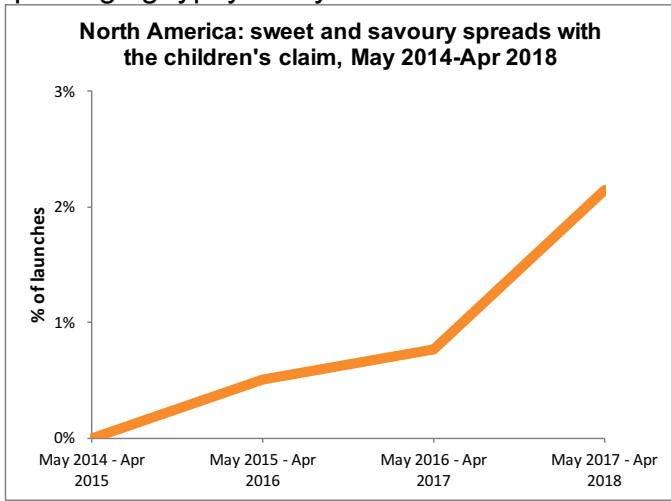
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Spreads marketed at children are increasing

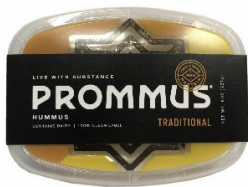
Spreads aimed at children are on the rise, with children's products mostly found in the chocolate spreads sub-category (7% of recent launches vs 3% and under in all other sub-categories). Event marketing (tying in with movie releases and characters) and quirky packaging typify many launches aimed at children



Vegy Vida Kids' Dip 'n More (USA) is made with a "special" extract from cucumbers that is claimed to help kids acquire a taste for vegetables. The dips are kosher certified, free-from sugar, GMO, nuts, gluten, soy and preservatives and provide 8g of protein.

Added protein claims are niche and can expand

Spreads that market high/added protein claims are niche - accounting for just 2% of sweet and savoury spreads launches in North America in the 12 months to April 2018. These can expand given consumer interest in adding more protein to their diet.



□ Prommus Traditional Hummus is claimed to have two times more protein, and a "100% clean label" with no preservatives. It has been high-pressure processed for freshness (USA)



Buff Bake Unicorn Protein Almond Spread is claimed to be packed with protein, and is formulated with added whey protein and "rainbow sprinkles" (USA)

54%
of adults in the US believe they need more protein in their diet.

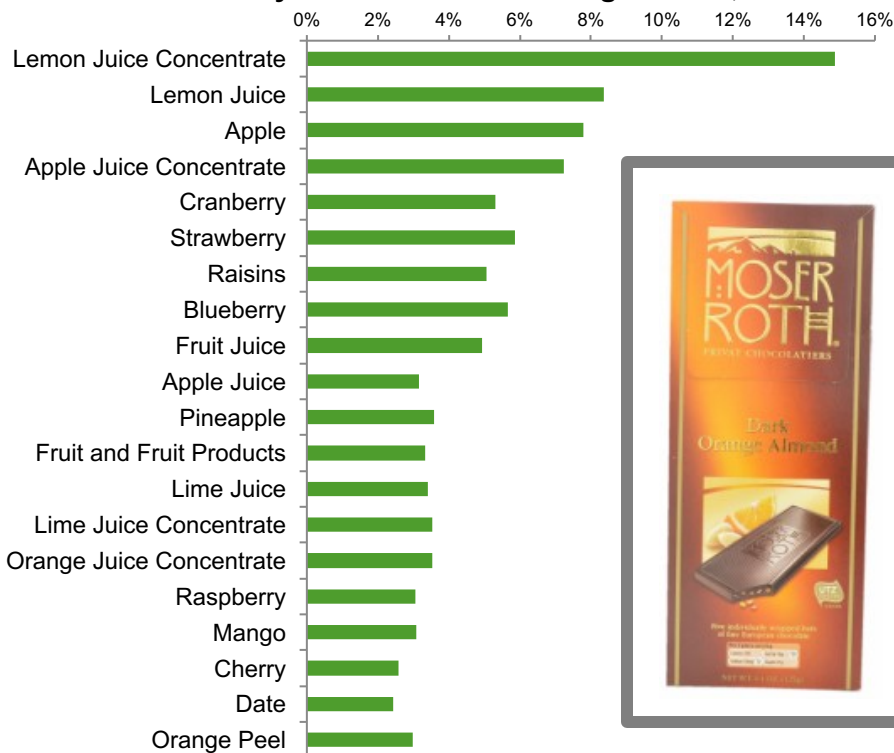
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This section of the monthly update keeps you informed on what's happening in fruit, focusing on popular and growing fruit ingredients being seen among food/drink products launched in North America.

Most Active & Top Growing Fruit Ingredients

% of North America food & drink products with fruit listed as an ingredient, by 20 most active fruit ingredients, June 2017-May 2018




Moser Roth Dark Orange Almond Chocolate features smooth melting chocolate from the finest South American cocoa, combined with pieces of orange and crisp almonds. Among the fruit ingredients listed on pack are **oranges, apples & pineapple fibers**.

45% of consumers in our panel responded that they likely or definitely would buy this product, **outperforming its subcategory (37%)**.

* Source: Mintel Purchase Intelligence

% of North America food & drink products with fruit listed as an ingredient, by 10 top growing fruit ingredients, June 2016-May 2018

Ingredient	% change:	
	Jun 2016 - May 2017	Jun 2017 - May 2018
Acerola Puree	645%	0.11%
Apricot Juice Concentrate	432%	0.04%
Apple Paste	326%	0.04%
Fruit Powders	326%	0.04%
Soursop	326%	0.04%
Plum Juice Concentrate	273%	0.06%
Black Cherry Juice Concentrate	219%	0.03%
Green Apple Powder	219%	0.03%
Pineapple Fibre	219%	0.03%
Sweet Orange Peel	219%	0.03%

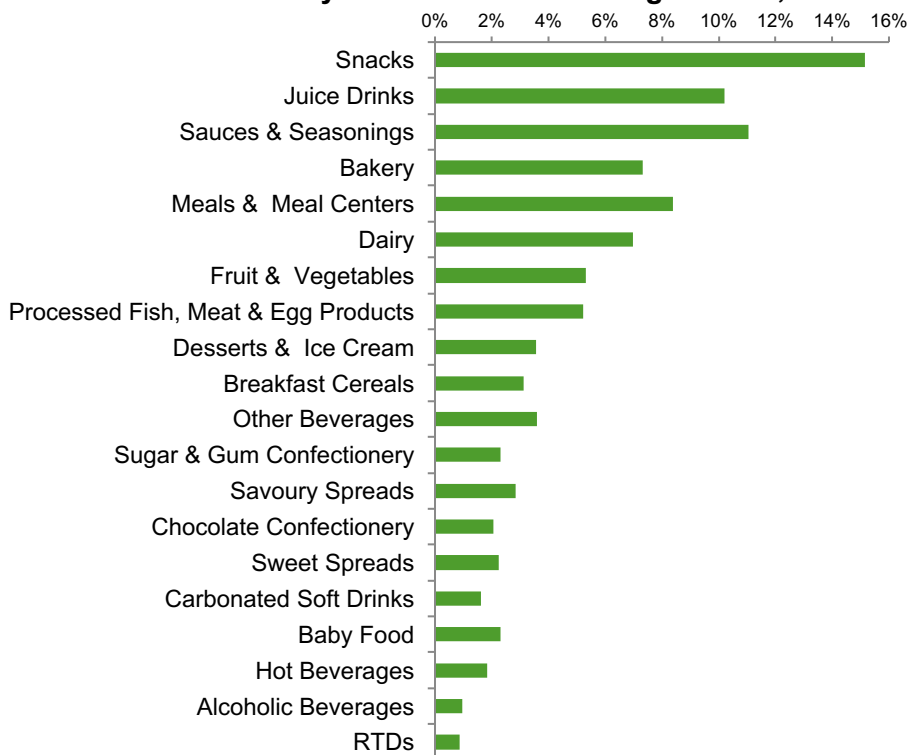
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Most Active & Top Growing Categories with Fruit Ingredients

% of North America food & drink products with fruit listed as an ingredient, by 20 most active fruit ingredients, June 2017-May 2018



Baby Gourmet Apple Spinach Oatmeal Organic Wholegrain Baby Cereal is enriched with niacin, riboflavin and thiamin, and is an excellent source of iron and B vitamins.

% of North America food & drink products with fruit listed as an ingredient, by 10 top growing sub-categories, June 2016-May 2018

Sub-category	% change:		Total Sample
	Jun 2016 - May 2017	Jun 2017 - May 2018	
Flavored Milk	326%	0.07%	
Beverage Mixes	250%	0.21%	
Baby Cereals	241%	0.15%	
Medicated Confectionery	219%	0.11%	
Butter	219%	0.03%	
Fortified & Other Wines	219%	0.03%	
Instant Noodles	148%	0.07%	
Pastry Dishes	143%	0.16%	
RTD (Iced) Coffee	131%	0.13%	
Other Sauces & Seasonings	121%	0.30%	

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