

Nuts, Seeds and Trail Mix - US - June 2016

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"The nuts, seeds, and trail mix category continues its steady growth trajectory as Americans adopt frequent snacking occasions, and seek convenient foods they can feel good about eating. Looking ahead, the category is expected to grow, despite facing competition from other snacking categories, including other salty snacks, and BFY (better-for-you) products like yogurt or nutritional bars."
- Amanda Topper, Senior Food Analyst

This report looks at the following areas:

- Category grows 28% from 2011-16
- 90% of US households purchase nuts, seeds or trail mix
- Convenience, nutrition important purchase drivers

This Report builds on the analysis presented in Mintel's *Chips, Popcorn, Nuts, and Dips – US, January 2014*, *Nuts and Dried Fruit – US, August 2012*, as well as the January 2011, July 2009, July 2007, February 2006, and February 2004 Reports of the same title.

This report covers the following segments:

- Nuts, including snack nuts, baking nuts, and toasted corn nuts
- Seeds, including sunflower and pumpkin seeds
- Trail mixes

Excluded from the scope of this Report are nuts and dried fruit that are coated in yogurt or chocolate. Also excluded from this Report are random weight/bulk nuts, seeds, and trail mixes.

This Report is part of Mintel's series on snacking. For other Reports related to snacking see *Chips and Dips – US, February 2016*, *Salty Snacks – US, April 2016*, and *Healthy Snacks – US, September 2016*.

BUY THIS
REPORT NOW

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

China
+86 (21) 6032 7300

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

Nuts, Seeds and Trail Mix - US - June 2016

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

What you need to know

Definition

Executive Summary

The issues

Category grows 28% from 2011-16

Figure 1: Total US sales and fan chart forecast of nuts, seeds and trail mix, at current prices, 2011-21

90% of US households purchase nuts, seeds or trail mix

Figure 2: Nuts, seeds and trail mix purchase, April 2016

Convenience, nutrition important purchase drivers

Figure 3: Innovation areas, April 2016

The opportunities

Promote occasions beyond snacking

Figure 4: Product use, April 2016

Cater to the on-the-go consumer

Figure 5: Behaviors, April 2016

Emphasize nutrition while alleviating concerns about fat and sodium

Figure 6: Attitudes, any agree, April 2016

What it means

The Market – What You Need To Know

Sales reach \$8.6 billion in 2016

Supermarkets are not the leading retailer

Competition from private label and other snacks

Market Size and Forecast

Category sales reach \$8.6 billion in 2016

Figure 7: Total US sales and fan chart forecast of nuts, seeds and trail mix, at current prices, 2011-21

Figure 8: Total US sales and forecast of nuts, seeds and trail mix, at current prices, 2011-21

Figure 9: Total US sales and forecast of nuts, seeds and trail mix, at inflation-adjusted prices, 2011-21

Market Breakdown

Nuts segment represents three quarters of category sales

Figure 10: Total US retail sales of nuts, seeds, and trail mix, by segment share, 2016

Figure 11: Total US retail sales and forecast of nuts, seeds and trail mix, by segment, at current prices, 2011-21

Other retail channels dominate

Figure 12: Total US retail sales of nuts, seeds and trail mix, by channel, at current prices, 2011-16

Natural channel sales flat

Figure 13: Natural supermarket sales of nuts, seeds and trail mix, at current prices, rolling 52 weeks ending Mar. 23, 2014-Mar. 20, 2016

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Nuts, Seeds and Trail Mix - US - June 2016

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 14: Natural supermarket sales of nuts, seeds and trail mix, by segment, at current prices, rolling 52 weeks ending Mar. 23, 2014-Mar. 20, 2016

Market Perspective

Private label a viable threat

Other snacks provide similar benefits

Figure 15: Attitudes and opinions about food – Any agree, 2010-15

Market Factors

Snacking is the new norm

Figure 16: Daily snacking frequency, January 2015

Obesity on the rise

Figure 17: Percent of people aged 20 or older who are healthy weight, overweight, or obese, 2003-06 to 2011-14

US demographics shifting

Figure 18: Households, by presence of own children, 2003-13

Figure 19: Population by generation share, 2016

Figure 20: Population by race and Hispanic origin, 2011-21

Key Players – What You Need to Know

Sales fragmented, private label represents one third of sales

Bold, indulgent flavors keep consumers interested in the category

Segment blurring brings meat snacks and trail mix together

Opportunity to position products for specific occasions, functions

Manufacturer Sales of Nuts, Seeds and Trail Mix

Private label represents more than one third of category sales

Manufacturer sales of nuts, seeds and trail mix

Figure 21: MULO sales of nuts, seeds and trail mix, by leading companies, rolling 52 weeks 2015 and 2016

What's Working?

Bold flavors

Figure 22: MULO sales of Planters nuts

Figure 23: MULO sales of Blue Diamond Growers nuts

Figure 24: MULO sales of Thanasi Foods LLC seeds

Simple preparations

Figure 25: MULO sales of Planters seeds

Figure 26: MULO sales of Fisher nuts

Trail mix combining flavors and textures

Figure 27: MULO sales of Kar's trail mix

Figure 28: MULO sales of Second Nature trail mix

Private label products

Figure 29: Branded and private label nuts, seeds and trail mix product launches, 2011-15

Figure 30: MULO sales of private label nuts, seeds and trail mix

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Nuts, Seeds and Trail Mix - US - June 2016

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

What's Struggling?

Leading trail mix brand takes a hit

Figure 31: MULO sales of Planters trail mix

Figure 32: MULO sales of TreeHouse Foods Inc. trail mix

Figure 33: MULO sales of Diamond Foods Inc.* trail mix

Leading seeds brands not sprouting

Figure 34: MULO sales of ConAgra Foods Inc. seeds

Figure 35: MULO sales of TreeHouse Foods Inc. seeds

What's Next?

Meat snack trail mix

International influences

Smart indulgences

Specific occasions and benefits

The Consumer – What You Need to Know

90% of households buy nuts, seeds, or trail mix

Snacking occasions driving consumption

Consumers value bold flavors, yet prefer to stick with tradition

Nearly half eat on the go

Health and nutrition drive purchases

Nuts, Seeds, and Trail Mix Purchase

Nearly all households buy nuts, seeds, or trail mix

Figure 36: Nuts, seeds and trail mix purchase, April 2016

Purchase skews toward higher-income households

Figure 37: Nuts, seeds and trail mix purchase, any purchase, by household income, April 2016

Millennials significantly more likely to make any purchase

Figure 38: Nuts, seeds and trail mix purchase, any purchase, by Millennials and Non-Millennials, April 2016

Hispanics more likely to purchase all types of nuts, seeds and trail mix

Figure 39: Nuts, seeds and trail mix purchase, any purchase, by Hispanic origin, April 2016

Product Use

Snack occasions most common

Figure 40: Product use, April 2016

Trail mix purchasers most likely to use it as a snack

Figure 41: Product use, by nuts, seeds and trail mix purchase, April 2016

Women more likely to snack, use these products as an ingredient

Figure 42: Product use, by gender, April 2016

Hispanics least likely to eat nuts, seeds, or trail mix as a snack

Figure 43: Product use, by race and Hispanic origin, April 2016

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Nuts, Seeds and Trail Mix - US - June 2016

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Flavor Innovation

Consumers prefer traditional flavors

Figure 44: Flavor innovation, April 2016

Familiar flavors can reach a majority audience

Figure 45: TURF analysis – Flavor innovation, April 2016

Innovation Areas

Resealable packaging, nutrition and simple ingredients most important

Figure 46: Innovation areas, April 2016

Figure 47: Natural supermarket sales of nuts, seeds and trail mix, by organic ingredients, at current prices, rolling 52 weeks ending Mar. 23, 2014 and Mar. 20, 2016

Figure 48: Natural supermarket sales of organic nuts, seeds and trail mix, by segment, at current prices, rolling 52 weeks ending Mar. 23, 2014 and Mar. 20, 2016

Parents want added nutrition, non-parents care about simplicity

Figure 49: Innovation areas, by parental status, April 2016

Millennials want products to fuel them on-the-go

Figure 50: Innovation areas, by Millennials and Non-Millennials, April 2016

High protein most important to Hispanic consumers

Figure 51: Innovation areas, by Millennials and Non-Millennials, April 2016

Behaviors

Nearly half of consumers eat on the go

Figure 52: Behaviors, April 2016

Millennials are super purchasers

Figure 53: Behaviors, by generation, April 2016

Parents eating nuts, seeds, and trail mix across locations

Figure 54: Behaviors, by parental status, April 2016

Hispanics are buying more products and snacking more in general

Figure 55: Behaviors, by Hispanic origin, April 2016

Attitudes toward Nuts, Seeds and Trail Mix

Health and nutrition are key purchase drivers

Figure 56: Attitudes, any agree, April 2016

Millennials value convenience, satiety and bold flavors

Figure 57: Attitudes, any agree, by generation, April 2016

Concerns about fat and sodium content amplified among parents

Figure 58: Attitudes, any agree, by parental status, April 2016

Hispanics most favorable toward health and nutrition benefits

Figure 59: Attitudes, any agree, by race and Hispanic origin, April 2016

Appendix – Data Sources and Abbreviations

Data sources

Sales data

Fan chart forecast

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Nuts, Seeds and Trail Mix - US - June 2016

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Consumer survey data
Abbreviations and terms
Abbreviations

Appendix – Market

Market breakdown

Figure 60: Total US retail sales of nuts, seeds, and trail mix, by segment, at current prices, 2014 and 2016
Figure 61: Total US retail sales and forecast of nuts, at current prices, 2011-21
Figure 62: Total US retail sales and forecast of seeds, at current prices, 2011-21
Figure 63: Total US retail sales and forecast of trail mix, at current prices, 2011-21

Retail channels

Figure 64: Total US retail sales of nuts, seeds, and trail mix, by channel, at current prices, 2014 and 2016
Figure 65: US supermarket sales of nuts, seeds, and trail mix, at current prices, 2011-16
Figure 66: US convenience store sales of nuts, seeds, and trail mix, at current prices, 2011-16
Figure 67: US convenience store sales of nuts, seeds, and trail mix through other retail channels, at current prices, 2011-16

Natural channels

Figure 68: Natural supermarket sales of nuts, seeds and trail mix, by GMO ingredients, at current prices, rolling 52 weeks ending Mar. 23, 2014 and Mar. 20, 2016
Figure 69: Natural supermarket sales of nuts, seeds and trail mix with non-GMO claim, by segment, at current prices, rolling 52 weeks ending Mar. 23, 2014 and Mar. 20, 2016
Figure 70: Natural supermarket sales of nuts, seeds and trail mix, by "natural" labeling or perception, at current prices, rolling 52 weeks ending Mar. 23, 2014 and Mar. 20, 2016
Figure 71: Natural supermarket sales of "natural" labeled/perceived nuts, seeds and trail mix, by segment, at current prices, rolling 52 weeks Mar. 23, 2014 and Mar. 20, 2016
Figure 72: Natural supermarket sales of seeds, by type, at current prices, rolling 52 weeks ending Mar. 23, 2014 and Mar. 20, 2016
Figure 73: Natural supermarket sales of nuts, by type, at current prices, rolling 52 weeks ending Mar. 23, 2014 and Mar. 20, 2016

Appendix – Key Players

Figure 74: MULO sales of nuts, by leading companies and brands, rolling 52 weeks 2015 and 2016
Figure 75: MULO sales of seeds, by leading companies and brands, rolling 52 weeks 2015 and 2016
Figure 76: MULO sales of trail mix, by leading companies and brands, rolling 52 weeks 2015 and 2016

Appendix – Consumer

Figure 77: Leisure activities/hobbies

Appendix – TURF Analysis

Methodology

Figure 78: Table – TURF analysis – Flavor innovation, April 2016

BUY THIS
REPORT NOW

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
Americas +1 (312) 943 5250 | China +86 (21) 6032 7300
APAC +61 (0) 2 8284 8100 |
EMAIL: reports@mintel.com