

NUTS, SEEDS & TRAIL MIXES – US – 2024

Nuts, seeds and trail mix are hidden champions, providing texture, nutrition and flavor. Get creative with versatility and flavors to revamp this OG BFY snack.



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This report looks at the following areas:

- The short-, medium- and long-term effects of inflation on nuts, seeds and trail mix and consumer behavior
- Reported purchase of nuts, seeds and trail mix
- Nuts, seeds and trail mix occasions
- Important purchase factors with nuts, seeds and trail mix
- Nuts, seeds and trail mix purchase motivators
- Innovation interests in nuts, seeds and trail mix
- Attitudes toward nuts, seeds and trail mix
- Trends and opportunities in launch activity for nuts, seeds and trail mix



Nuts, seeds and trail mix are hidden champions, providing texture, nutrition and flavor. Get creative with versatility and flavors to revamp this OG BFY snack.

Overview

Nuts, seeds and trail mix tick a lot of boxes as the perfect snack, yet opportunities exist to more greatly meet their potential in the competitive snack space. Despite their portable, BFY, protein-rich, and flavorful attributes, they occupy a **middling spot among the most frequently eaten snacks**. This disconnect largely stems from pricing and perceived value concerns. The key to elevating their status is twofold: firstly, move beyond snacking to demonstrate new forms of value and application; secondly, double down on all of these things that are fundamental to snacking.

Nuts are a pantry staple in most U.S. households, with 91% of consumers reporting purchases in the last three months. Seeds and trail mix have fewer participants with 39% and 37% purchase rates respectively. Given the category's reputation for health benefits and its perceived

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importance to a balanced diet, it's crucial to stress the nutritional advantages, such as protein for energy. However, since the category is predominantly used for snacking, focusing on flavors and indulgence is also important, especially to appeal to snack-loving Gen Z consumers. Finding the right mix of health, flavor, indulgence, and value is essential for expanding the category's reach.

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Report Content

EXECUTIVE SUMMARY

- What you need to know
- Consumer trends: key takeaways
- Market size and forecast of nuts, seeds and trail mixes
- Market predictions
- Opportunities

MARKET DYNAMICS

Market drivers

- Market context
- Alleviated financial pressures can support growth
 - Graph 1: opinions on financial future, 2024
- Frequent snacking continues to become the new norm
 - Graph 2: snacking motivations, 2024
- Ageless interest in health represents opportunity and obstacles for brands
 - Graph 3: efforts towards healthy eating, 2023
- Protein trends strengthen the category's potential
 - Graph 4: protein attitudes, 2024

Market size and forecast

- Nuts, seeds and trail mix experience slow (but steady) growth
- Effective strategies needed to pull the category out of sluggish growth
- Anticipated valuation of the category to exceed \$11bn by 2028
- Ensure that nuts, seeds and trail mixes are in the snack consideration set in alternate channels
 - Graph 5: total retail sales of nuts, seeds and trail mix, by channel, at current prices, 2018-23

Market segmentation

- Nut segment is nearly seven times larger than trail mix and seeds
 - Graph 6: total retail sales and forecast of nuts, seeds and trail mixes, by segment, at current prices, 2018-28
- Anticipated gradual expansion across all segments

Market share/brand share

- Private labels dominate share in nuts, seeds and trail mix
 - Graph 7: market share of nuts, seeds and trail mix, by leading companies, rolling 2024
- All brands lost sales, even private label

Sales of nuts, by company

- Top brands face challenges in demonstrating value leading to decreased sales
- Amidst declines, Hormel and private label pick up share

Sales of seeds, by company

- Seed brands outpace nuts in growth
- Most seed brands see higher growth than the segment overall

Sales of trail mix, by company

- Private label dominates share in trail mix
- Brands across the trail mix see growth

CONSUMER INSIGHTS

Consumer fast facts

Purchase of nuts, seeds, and trail mix

- Nuts continue to dominate the category, but trail mix and seeds make headways
 - Graph 8: purchase of nuts, seeds and trail mix, 2024
- Nuts, seeds and trail mix see a boost in reported purchase
 - Graph 9: purchase of nuts, seeds and trail mix, 2020, 2022 and 2024
- Gen Z and Millennials appreciate variety in the category
 - Graph 10: purchase of nuts, seeds and trail mix, by generation, 2024
- Nutrition and variety can be a source of value to all incomes
 - Graph 11: purchase of nuts, seeds and trail mix, by various household income, 2024

Nuts and seeds occasions

- Ample room to move nuts and seeds across dayparts and occasions
 - Graph 12: consumption occasions of nuts and seeds, 2024
- Feed Gen Z, Millennial needs with enhanced ideas and value
 - Graph 13: consumption occasions of nuts and seeds, by generation, 2024
- Parents embrace nutrition boost of nuts and seeds across occasions
 - Graph 14: consumption occasions of nuts and seeds, by parental status, 2024

Trail mix occasions

- Explore the trail less snacked
 - Graph 15: consumption occasions of trail mix, 2024
- Snackification is the catalyst for novel applications
 - Graph 16: consumption occasions of trail mix, by generation, 2024
- Everyone who eats trail mix are candidates for expansion

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- Graph 17: consumption occasions of trail mix, by various demographics, 2024

Important nut, seed and trail mix purchase factors

- Brands can stand out in a variety of ways
 - Graph 18: important factors in nuts, seeds and trail mix purchase, 2024
- Younger generations seek a mix of flavors, health benefits and portability in nuts
 - Graph 19: factors of importance when choosing nuts, by generation, 2024
- Broad tactics can enhance the attractiveness of trail mix to younger users
 - Graph 20: factors of importance when choosing trail mix, by generation, 2024

Reasons for nut, seed and trail mix purchase

- Embrace flexibility from 'cashews' on the couch to 'almonds' on the move
- Keep nuts, seeds and trail mix in the snacking consideration set for all occasions
 - Graph 21: nuts, seeds and trail mix purchase motivations, 2024
- Connect nut, seed and trail mix nutrition to tangible benefits
 - Graph 22: nuts, seeds and trail mix purchase motivations, by generation, 2024
- Leverage plant-based nutrition to create value
 - Graph 23: nuts, seeds and trail mix purchase motivations, by household income, 2024

Nuts, seeds and trail mix innovation

- Consumers seek high flavor and taste
- Flavor takes the cake in innovation of interest
 - Graph 24: interest in nuts, seeds and trail mix innovation, 2024
- Flavor innovation will additively gain more trial than BFY or packaging
- The future of nuts, seeds and trail mix is flavorful
 - Graph 25: interest in nuts, seeds and trail mix innovation, by generation, 2024

Nuts, seeds and trail mix attitudes

- All signs point to the idea that consumers want to eat more nuts, seeds and trail mix...
 - Graph 26: nuts, seeds and trail mix attitudes, 2024
- Given the prevalence of snacking, need arises for nuts, seeds and trail mix to be in the consideration set more
 - Graph 27: nuts, seeds and trail mix attitudes NET – any agree, by generation, 2024
- More than cost: value can stem from health benefits and flexibility
 - Graph 28: nuts, seeds and trail mix attitudes NET – any agree, by household income, 2024

COMPETITIVE STRATEGIES

Launch activity and innovation

- Brands go bold with flavor makeovers
- Raising the bar for premium tastes

- Graph 29: [no title]

- Nuts and seeds flavor innovation stems from beloved tastes in other categories
- Nuts, seeds and trail mix get sizzlin' with heat
- New twists on classic flavors redefine innovation
- Brands get festive with holiday-inspired flavors
- Brands lean into purposeful snacking through functionality
- Products tailored to specific uses and health benefits show high purchase intent and positive perceptions

- Graph 30: [no title]

- Brands engage the senses with unexpected textures
- Brands continue crack the conventional mold

- Graph 31: [no title]

Marketing and advertising

- Nuts and seeds address both functional and emotional snacking needs
- Making the connection between protein and energy
- Brands embrace nuts and seeds as the OG plant-based protein powerhouses
- Empowering women's health with specifically designed nut and seed products

Opportunities

- Turn basic nuts into trendy, standout snacks through bold marketing strategies
- Enhance perceptions of flavored varieties through use ideas beyond snacking
- Help consumers choose their own adventure
- From cocktails to salads, show how nuts and seeds can elevate complimentary foods
- Eat this... not that

APPENDIX

- Market definition
- Consumer research methodology
- Generations
- Abbreviations and terms
- Forecast
- Forecast fan chart

The market

- Retail sales and forecast of nuts, seeds and trail mixes
- Retail sales and forecast of nuts, seeds and trail mixes, at inflation-adjusted prices, 2018-28
- Retail sales of nuts, seeds and trail mix, by segment
- Average annual household spending on nuts, seeds and trail mixes
- Total retail sales of nuts, seeds and trail mixes, by segment

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- Total retail sales and forecast of nuts, at current prices
- Total retail sales and forecast of nuts, at inflation-adjusted prices
- Value, average price and volume of multi-outlet nuts sales
- Total retail sales and forecast of seeds, at current prices
- Total retail sales and forecast of seeds, at inflation-adjusted prices
- Value, average price and volume of multi-outlet seeds sales
- Total retail sales and forecast of trail mix, at current prices
- Total retail sales and forecast of trail mix, at inflation-adjusted prices
- Value, average price and volume of multi-outlet trail mixes
- Total retail sales of nuts, seeds and trail mixes by channel
- Supermarket sales of nuts, seeds and trail mixes, at current prices
- Convenience store sales of nuts, seeds and trail mixes, at current prices
- Sales of nuts, seeds and trail mixes through other channels
- Sales of nuts, seeds and trail mix, by company
- Sales of nuts, by company
- Sales of seeds, by company
- Sales of trail mix, by company

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