Peanut Global Trends

April 2016
Who we are

The insights behind your next big idea

Consumers
We ask 30,000 people for their opinions each month.

Markets
We track consumer spending in 3,000 markets across 34 countries.

Innovation
We cover 34,000 new product launches from 62 countries each month.

Trends
We track more than 70 consumer lifestyle trends and thousands of observations on a daily basis.
What’s happening in the world of peanuts?

Market overview

Peanuts uses (ex. Snacking)

Snacking Flavours

Snacking & Better For You
Market Overview
New products containing peanuts in consistent growth in Europe


Source: Mintel GNPD
USA, China and India share a third of all launches globally


Source: Mintel GNPD
Nuts are confusing for consumers: BFY vs. Fat/Calories

‘Health’ related attitudes towards nuts (2015)

- I limit the amount of roasted nuts I eat because I think they are unhealthy - Any agree
  - France: 34%
  - Germany: 19%
  - Italy: 25%
  - Spain: 28%

- I would be more likely to buy healthier nut options - Any agree
  - France: 65%
  - Germany: 54%
  - Italy: 64%
  - Spain: 61%

- I would buy more nuts if the calorie/fat/salt content was lower - Any agree
  - France: 52%
  - Germany: 39%
  - Italy: 53%
  - Spain: 51%

- Roasted nuts are a good source of protein and vitamins - Any agree
  - France: 54%
  - Germany: 58%
  - Italy: 71%
  - Spain: 76%

- Roasted nuts are healthier than crisps/other salty snacks - Any agree
  - France: 47%
  - Germany: 44%
  - Italy: 59%
  - Spain: 60%

Source: Mintel GNPD
Peanut uses (ex. Snacking)
Snacking categories dominate, with bakery, sauces and ready meals making an appearance


- Snacks, 45%
- Chocolate Confectionery, 14%
- Sugar & Gum Confectionery, 7%
- Bakery, 11%
- Desserts & Ice Cream, 4%
- Sauces & Seasonings, 5%
- Sweet Spreads, 5%
- Breakfast Cereals, 2%
- Meals & Meal Centres, 3%
- Dairy, 2%
- Other, 2%

Source: Mintel GNPD
Meal categories for protein content or a crunchy topping

**Lean Cuisine Marketplace Chicken with Peanut Sauce** - white meat chicken tenderloins with carrots, broccoli and edamame with linguini and a peanut sauce – Canada

**M&S Salads Fruits & Vegetables – Nutty Wholefood Salad with an Aromatic Soy & Ginger Dressing** – UK

**Saffron Road Vegetable Pad Thai with Rice Noodles** consists of firm tofu with carrots and scallions in an exotic peanut sauce – USA

**Scratch. Vietnamese Stir Fry with Spring Onion, nuts & Ginger** – UK

**Plus Bami Goreng with Satay Ajam** – pork and marinated chicken pieces in a peanut sauce – Netherlands

**Baby Sprout Mixed Baby Leaves** – baby leaves, baby sprouts and a 20g sachet of nut topping that contains almond, peanuts and walnuts – South Korea

Source: Mintel GNPD
Unilever premium ice-cream use peanut butter for intense & indulgent flavours

Magnum Double Peanut Butter Ice-Cream Bar is coated with low fat cocoa, contains peanut butter sauce and a second milk chocolate coating.

Ben & Jerry’s Cookie Core Utter Peanut Butter Clutter Ice Cream – peanut butter ice cream with peanut butter cookies (7%) surrounding a crumbled peanut butter cookie core (13%).

Source: Mintel GNPD
And cereal brands market fitness and protein in re-sealable packs

Kellogg’s Nutri-Grain Edge Tropical Blend & Caramelised Peanuts Oat Clusters – crunchy oat clusters with lightly caramelised peanuts and tropical fruit pieces, with protein and fibres from nuts and oats to help feel fuller in the morning – New Zealand

Nature Valley Protein Peanut Butter ‘n Dark Chocolate Granola – features 10g protein and can be enjoyed as a topper on yogurt, oatmeal, salads, or fruit – USA

Source: Mintel GNPD
Flavours of peanut butter NPD reflect trends in snacking

Nuts For Nuts! Salted Caramel Chunky Peanut Butter - Indonesia

Mother Earth Chia Seed Natural Peanut Butter. This natural product is made with freshly roasted hi-oleic peanuts in small batches and wholesome chia seeds – New Zealand

The Wild Peanut Ooh Chilli Peanut Butter with Chilli Powder and Honey is described as great tasting, natural peanut butter infused with fiery chilli - UK

Source: Mintel GNPD
Peanut butter powder offer meal enhancers and indulgent hot beverages

Better Body Foods PB Fit Peanut Butter Powder is made from peanuts with most of the oil extracted. The powder needs the addition of water for a reduced fat peanut butter spread, or added to smoothies for a protein boost - UK

Honeyville Organic Peanut Butter Powder provides 1g fat per serving which is 90% less than traditional peanut butter, and is made with 100% USA peanuts. It is said to be a great source of protein and vitamin B3 – USA

Jif Chocolate Peanut Powder has 85% less fat than traditional peanut butter, providing 2g fat per serving compared to 16g fat per serving of peanut butter, and has seven grams of protein per serving - USA

Source: Mintel GNPD
Peanut Milk could enter the dairy alternative market in Europe

In the US, 82% of non-dairy milk consumers drink almond milk because it is nutritious. The peanut milk concept is also said to be nutritious.

The current concept has 8g of plant-based protein per cup, which is significantly higher than almond milk. Current launches have primarily been in the Asia Pacific region between 2010 and May 2015.

Source: Mintel GNPD
Snacking Flavours
Consumer flavour attitudes remain adventurous

39% of Italian consumers would like to see more nuts with sweet/dessert-type flavours (such as chocolate or tiramisu)

40% of French consumers would like to see more nuts with spicy/hot flavours

50% of Brazilian consumers think unusual/exotic flavours of salty snacks are appealing

Source: Mintel Lightspeed
Hot & spicy flavours launching more authentic ethnic flavours

New York Delhi Hot & Spicy Mumbai Mix contains spicy noodle, peanut and sultana snack – UK & Australia

Yinwa Asian Snacks Kobe Chili and Curry Flavoured Rice Cracker and Peanut Snack Mix – Germany

Captain Tiptoes No. 8 Sweet Chilli Harissa Nuts are described as courageously pert peanuts and almonds, seasoned with sweet chilli harissa - Denmark

Source: Mintel GNPD
And sweeter flavours take insight from desserts and ice-cream

- **Planters Salted Caramel Peanuts** – USA
- **Efkarpon Karamelomena Apple Flavoured Caramelised Nuts with Honey & Cinnamon** – Greece
- **Squirrel Brand Crème Brûlée Almonds** – sweet crème almonds layered with caramelised sugar – Canada

*Source: Mintel GNPD*
Bitebox survival food in Germany – on-the-go snacks in various flavours

BiteBox, Hamburg, recently injected some fun into Germany’s healthy snacking by launching its BiteBox Survival Food range.

The snacks have been positioned as a healthy, easy and comfortable solution to out-of-control office snacking.

The ten skus include different varieties of nuts, dried fruits and vegetables as well as snack mixes:

- Wassssup?!, Zündstoff (dynamite),
- Coffee To Go
- Herr Bööörns (Mr. Buuurning).

Source: Mintel GNPD
Jim Beam & Guinness take inspiration from beers and spirits

Jim Beam Honey Bourbon Roasted & Salted Peanuts (USA)

Jim Beam recently launched its whiskey flavoured nut range in the US and features in four varieties; Honey Bourbon Roasted & Salted Cashews, Honey Bourbon Roasted & Salted Peanuts, Oak Barrel Smoked Roasted & Salted Almonds and Oak Barrel Smoked Roasted & Salted Mixed Nuts. Soaked in genuine Beam whiskey the nuts are described to carry sweet and smoky flavours.

Guinness Gourmet Peanuts & Cashews (UK)

Guinness Gourmet Peanuts & Cashews is a mix of oven roasted steak and Guinness flavour peanuts and Guinness flavour cashew nuts.

Source: Mintel GNPD
KP break into indulgent snacking with Nutty Nibbles Range

KP launched their nutty nibbles range to offer their core customers a truly indulgent snack mixed with honey roasted peanuts.

Variants include cherry, cranberry, caramel & honeycomb and hobnobs & chocolate.

Source: Mintel GNPD
Snacking & Better-for-you
Protein and satiety a key selling point

59% of German Consumers agree that roasted nuts are healthier than crisps/chips and other healthy snacks.

76% of Spanish consumers think roasted nuts are a good source of protein.

79% of UK consumers agree that nuts provide a good energy boost.

Source: Mintel Lightspeed
Peanuts/other nuts a key protein in ‘meal replacement’ snacks

“Snacks” and “meals” are blurring under a healthier positioning. Such innovations have not only served as an impromptu snack choice, but also as a planned component of healthy, snack-based meal.

“Satisfies between meal-cravings”
Lance Gluten Free Peanut Butter Bite Size Sandwich Crackers – USA Dec 2015

“You don’t have to compromise flavour in favour of smart nutrition”
Sargento Balanced Breaks Pepper Jack Natural Cheese, Honey Roasted Peanuts & Raisins - $7.6m in 1st year ($40m range) – USA Mar 2015

“Good just got interesting”
Graze Punchy Protein Nuts – chilli, lime cashews, almonds and lightly salted peanuts – UK Aug 2015

Source: Mintel GNPD
Mars continue to launch under snack hybrid goodness knows

Mars, Inc. recently launched its goodnessknows snack squares in the US market. Although goodnessknows is classified as a snack bar, the product is sold in a package of four small squares that suggest portion control along with functional benefit.

Each bar contains 150 calories and retails in the flavours; cranberry, almond, dark chocolate; apple, almond & peanut, dark chocolate; and peach & cherry, almond, dark chocolate.
Brands promise on-the-go energy

Considering that 73% of US consumers look for breakfast options that promise sustained energy, suggests that the satiety positioning could be better exploited by brands launching trail mixes. Only a handful of launches in the last 12 months are claimed to provide energy.

Rite Aid Pantry Energy Trail Mix (USA)

The mix comprises peanuts, banana chips, raisins, mangoes, sunflower kernels, almonds and dates. The sodium-free product contains 0g trans fat per serving.

Planters NUT-rition Blueberry Nut Sustaining Energy Mix (USA)

Made with honey roasted peanuts, honey soy clusters, almonds, yogurt coated raisins and blueberries. The kosher product has 6g of protein per serving, and is described as a good source of fibre, vitamins and minerals.

Source: Mintel GNPD
What does this all mean?

Authenticity
Brands could continue to emulate the spread of newer ethnic flavours, especially from the Far East, by making flavours more specific to newer cuisines. E.g. Sriracha for Korean, Harissa for Tunisian/Arabic.

Adding Texture
As the scratch cooking trends grows, the addition of nuts in meal kits, or as a ready to use ingredient, in a small pouch or as a compartment, helps consumers to add texture to their cooking.

Protein
The trend is not going away. Consumers, both those who are meat avoiders and fitness/weight loss oriented, see nuts as a great protein alternative or addition to their diet. More products that are tailored to fitness consumers could make a great impact.
Thanks, Get in contact

Edward Bergen
Trends and Innovation Consultant
ebergen@mintel.com
Office: +44 (0) 203 416 4298