



Freedonia Focus Reports
US Collection

Nuts & Seeds: United States

June 2020



BROCHURE
CLICK TO ORDER
FULL REPORT

www.freedoniafocusreports.com

Table of Contents

1. Highlights	3
2. Market Environment	5
Historical Trends	5
Key Economic Indicators	7
Price Trends	8
Consumer Trends	10
Regulatory Factors	17
3. Segmentation & Forecasts	19
Products	19
Peanuts	24
Almonds	26
Cashews	27
Walnuts	29
Pecans	30
Pistachios	32
Other Nuts	33
Seeds	34
4. Industry Structure	37
Industry Characteristics	37
Market Leaders	39
Blue Diamond Growers	40
John B. Sanfilippo & Son	41
Kraft Heinz	42
5. About This Report	43
Scope	43
Sources	43
Industry Codes	44
Freedonia Methodology	44
Resources	46

List of Tables & Figures

Figure 1 Key Trends in US Nuts & Seeds Volume Demand, Season 2018/2019 – 2023/2024	3
Figure 2 US Nuts & Seeds Volume Demand Trends, Season 2008/2009 – 2018/2019	5
Figure 3 US Nuts & Seeds Value Demand Trends, Season 2008/2009 – 2018/2019	6
Table 1 Key Indicators for US Nuts & Seeds Demand, 2009 – 2024	7
Figure 4 US Nuts & Seeds Price Index, Season 2008/2009 – 2023/2024 (2008/2009=100)	8
Table 2 US Nuts & Seeds Prices, Season 2008/2009 – 2023/2024 (US\$/lb)	9
Figure 5 US Survey: Current Eating Patterns, 2020 (%)	10
Figure 6 US Survey: COVID-19 Impact on Nuts & Seeds & Related Products, 2020 (%)	11
Figure 7 US Survey: Frequency of Snacking on Nuts & Seeds, 2020 (%)	11
Figure 8 US Survey: Frequency of Cooking with Nuts & Seeds, 2020 (%)	12
Figure 9 US Survey: Use of Nut & Seed Products, 2020 (%)	12
Figure 10 US Survey: Use of Nut Butters Other than Peanut, 2020 (%)	13
Figure 11 US Survey: Nut & Seed Purchase Location, 2020 (%)	13
Figure 12 US Survey: Frequency of Nut & Seed Product Purchases, 2020 (%)	14
Figure 13 US Survey: Household Use of Nuts for Snacking & Cooking, 2020 (%)	14
Figure 14 US Survey: Household Use of Nuts for Cooking & Snacks by Type, 2020 (%)	15
Figure 15 US Survey: Nut Brands Purchased Most Often by Households, 2020 (%)	15
Figure 16 US Survey: Number of Packages Purchased in the Last 30 Days, 2020 (%)	16
Figure 17 US Nuts & Seeds Demand by Product, Season 2008/2009 – 2023/2024 (bil lbs; shelled)	19
Table 3 US Nuts & Seeds Demand by Product, Season 2008/2009 – 2023/2024 (mil lbs; shelled)	19
Figure 18 US Nuts & Seeds Demand by Product, Season 2008/2009 – 2023/2024 (US\$ bil)	21
Table 4 US Nuts & Seeds Demand by Product, Season 2008/2009 – 2023/2024 (US\$ mil)	21
Figure 19 US Nuts & Seeds Volume Demand by Product, Season 2008/2009 – 2023/2024 (% of lbs)	24
Figure 20 US Peanuts Volume & Value Demand, Season 2008/2009 – 2023/2024	25
Figure 21 US Almonds Volume & Value Demand, Season 2008/2009 – 2023/2024	26
Figure 22 US Cashews Volume & Value Demand, Season 2008/2009 – 2023/2024	28
Figure 23 US Walnuts Volume & Value Demand, Season 2008/2009 – 2023/2024	30
Figure 24 US Pecans Volume & Value Demand, Season 2008/2009 – 2023/2024	31
Figure 25 US Pistachios Volume & Value Demand, Season 2008/2009 – 2023/2024	32
Table 5 Leading Suppliers to the US Nuts & Seeds Market by Product	39
Table 6 NAICS & SIC Codes Related to Nuts & Seeds	44

About This Report

Scope

This report forecasts to the 2023/2024 season US nuts and seeds demand and production in pounds on a shelled (i.e., without shells) basis and in nominal US dollars valued at the point of first sale (i.e., farmer or processor level). Total demand in pounds and nominal US dollars is segmented by product in terms of:

- peanuts
- almonds
- cashews
- walnuts
- pecans
- pistachios
- other nuts, consisting of macadamias, hazelnuts, Brazil nuts, and pine nuts
- sunflower seeds
- other seeds, consisting of flaxseeds and sesame seeds

To illustrate historical trends, total demand, total production, and the various segments are provided in annual series from the 2008/2009 to the 2018/2019 season.

Important notes regarding the scope of this report:

- Sales in value terms may represent in-shell or shelled products, depending on how the items are first sold. For example, almonds are typically first sold after being shelled, while peanuts are sold in-shell.
- Years with large increases in production result in significant inventory buildup, often leading to price declines.
- For products not grown commercially in the US – including cashews, Brazil nuts, and pine nuts – demand is valued at import prices.
- Nuts and seeds imported into the US as part of a trail mix are excluded from demand figures.

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading companies, are covered in this report. A full outline of report items by page is available in the Table of Contents.

Sources

Nuts & Seeds: United States (FF10054) represents the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources, such as:

About This Report

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- intergovernmental and non-governmental organizations
- proprietary and licensed national consumer survey data
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

Industry Codes

Table 6 | NAICS & SIC Codes Related to Nuts & Seeds

NAICS/SCIAN 2017		SIC	
North American Industry Classification System		Standard Industrial Classification	
111120	Oilseed (except Soybean) Farming	0119	Cash Grains, NEC
111191	Oilseed and Grain Combination Farming	0139	Field Crops, Except Cash Grain
111335	Tree Nut Farming	0173	Tree Nuts
111336	Fruit and Tree Nut Combination Farming	0179	Fruit and Tree Nuts, NEC
111992	Peanut Farming	0722	Crop Harvesting
115113	Crop Harvesting, Primarily by Machine	0723	Crop Preparation Services for Market
115114	Postharvest Crop Activities (except Cotton Ginning)	2068	Salted and Roasted Nuts and Seeds
311911	Roasted Nuts and Peanut Butter Manufacturing	2099	Food Preparations, NEC

Source: US Census Bureau

Freedonia Methodology

The Freedonia Group, a subsidiary of MarketResearch.com, has been in business for more than 30 years and in that time has developed a comprehensive approach to data analysis that takes into account the variety of industries covered and the evolving needs of our customers.

Every industry presents different challenges in market sizing and forecasting, and this requires flexibility in methodology and approach. Freedonia methodology integrates a variety of quantitative and qualitative techniques to present the best overall picture of a market's current position as well as its future outlook: When published data are available, we make sure they are correct and representative of reality. We understand that published data often have flaws either in scope or quality, and adjustments are made accordingly.

About This Report

Where no data are available, we use various methodologies to develop market sizing (both top-down and bottom-up) and then triangulate those results to come up with the most accurate data series possible. Regardless of approach, we also talk to industry participants to verify both historical perspective and future growth opportunities.

Methods used in the preparation of Freedonia market research include, but are not limited to, the following activities: comprehensive data mining and evaluation, primary research, consensus forecasting and analysis, ratio analysis using key indicators, regression analysis, end use growth indices and intensity factors, purchase power parity adjustments for global data, consumer and end user surveys, market share and corporate sales analysis, product lifespan analysis, product or market life cycle analysis, graphical data modeling, long-term historical trend analysis, bottom-up and top-down demand modeling, and comparative market size ranking.

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or r^2 . The most stable data series relative to the trend carries an r^2 value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

Copyright & Licensing

The full report is protected by copyright laws of the United States of America and international treaties. The entire contents of the publication are copyrighted by The Freedonia Group.

Resources

The Freedonia Group

Freedonia Industry Studies

Commercial Refrigeration Equipment

Food Safety Products in the US

Global Food Processing Machinery

Pouches in the US

Freedonia Focus Reports

Beverages: United States

Bread & Bakery Products: United States

Cheese: United States

Frozen Foods: United States

Fruit Beverages: United States

Grain-Based Foods: United States

Ice Cream & Frozen Desserts: United States

Meat & Poultry Products: United States

Pouches: United States

Processed Food: United States

Salty Snacks: United States

Snack Foods: United States

Yogurt: United States

Freedonia Custom Research

Trade Publications

BakeryandSnacks.com

Candy Industry

ConfectioneryNews.com

Convenience Store Decisions

FoodBev.com

Food Business News

FoodNavigator-USA.com

Food Processing

Growing Produce

Snack Food & Wholesale Bakery

Snack Food Industry Marketplace

Western FarmPress

Agencies & Associations

Administrative Committee for Pistachios
Almond Board of California
American Peanut Council
American Pecan Council
American Pistachio Growers
California Department of Food & Agriculture
California Walnut Board
Georgia Department of Agriculture
National Peanut Board
National Pecan Shellers Association
Oregon Hazelnuts
Peanut Institute
Peanut & Tree Nut Processors Association
United States Census Bureau
United States Department of Agriculture
United States Food and Drug Administration
United States International Trade Commission