

## Fruit - US - August 2015

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 fruit market has experienced fairly steady growth since 2010. Fruit's performance has been bolstered by fresh fruit, and hurt by shelf-stable segments. The frozen fruit segment may be small but it has maintained rapid growth and generally favorable consumer perception."  
- Amy Kraushaar, Category Manager - Food, Drink and Foodservice

### This report looks at the following areas:

- Shelf-stable fruit segments aren't pulling weight
- Brand leaders aren't helping matters in respective shelf-stable subsegments
- Fruit's snack-able appeal isn't grabbing parents and Millennials

This report covers the US market for fruit, which is defined as follows:

- Fresh fruit – includes whole fruit (loose and packaged), and fresh-cut packaged fruit
- Canned/jarred fruit – shelf-stable jarred/canned fruit
- Frozen fruit – bagged/boxed in the freezer section
- Dried fruit – such as apricots, dates, prunes, and raisins.

Unless otherwise noted, the following foods are excluded from the scope of this report:

- Fruit juices, drinks, or smoothies
- Fruit jams, purees, sauces, and spreads
- Fruit snacks (such as fruit rolls, bars, pureed pouches)
- Frozen fruit novelties (even those made with 100% fruit)
- Refrigerated prepared side dishes that include fruit
- Vegetables (which are covered in a similarly presented companion report: Vegetables – US, June 2015).

**BUY THIS  
REPORT NOW**

VISIT:  
[store.mintel.com](http://store.mintel.com)

CALL:  
EMEA  
+44 (0) 20 7606 4533

Brazil  
0800 095 9094

Americas  
+1 (312) 943 5250

APAC  
+61 (0) 2 8284 8100

EMAIL:  
[reports@mintel.com](mailto: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

# Fruit - US - August 2015

**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

Definitions

### Executive Summary

The issues

Shelf-stable fruit segments aren't pulling weight

Figure 1: Total US retail sales and forecast of fruit, by segment, 2010-15

Figure 2: Total US sales and fan chart forecast of fruit, at current prices, 2010-20

Brand leaders aren't helping matters in respective shelf-stable subsegments

Figure 3: Leading brand performance vs. total sales, by subsegment, 2014-15\*

Fruit's snack-able appeal isn't grabbing parents and Millennials

Figure 4: Fruit for snacking behavior, by generation and presence of children, June 2015

The opportunities

Parents and Millennials see benefits of nonfresh options

Figure 5: Fruit purchases, Millennials and parents vs. all respondents, June 2015

Specialization and provenance increasingly relevant, especially to parents

Figure 6: Attitudes toward fruit's provenance, June 2015

Frozen fruit's positive image can be exploited further

Figure 7: Average response rate for fruit's top five favorable characteristics, by fruit type, June 2015

What it means

### The Market – What You Need to Know

Fruit market sees steady growth

Fresh trend on full display in this market

Organics losing share in some outlets

### Market Size and Forecast

Fruit market tops \$47 billion

Figure 8: Total US sales and fan chart forecast of fruit, at current prices, 2010-20

Figure 9: Total US sales and forecast of fruit, at current prices, 2010-20

### Market Breakdown

Fresh fruit dominates; shelf-stable segments lag; frozen fruit leaps

Figure 10: Total US retail sales of fruit, by segment sales share percentage, 2015

Figure 11: Total US retail sales and forecast of fruit, by segment, at current prices, 2010-20

### Market Perspective

Organics not keeping pace in natural and other supermarkets

Figure 12: Natural supermarket sales of packaged fruit, by segment, rolling 52 weeks May 2013-May 2015

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)

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

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

## Fruit - US - August 2015

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.

### Market Factors

Millennials figure prominently in fruit market

Figure 13: Population share percentage, by generation, 2010, 2015, 2020

Fruit prices fluctuate modestly but supply challenges lie ahead

Figure 14: Changes in food price indexes, fruits and vegetables, 2011-15\*

### Key Players – What You Need to Know

Leading companies performing worse than store and other brands

Shelf-stable segments losing steam, no thanks to leading brands

Frozen fruit a bright spot, but brand identity challenged

### Manufacturer Sales of Fruit

Dole and Del Monte hold onto a third of fruit market

Manufacturer sales of fruit

Figure 15: MULO sales of fruit, by leading companies and brands, rolling 52 weeks 2014 and 2015

### What's Working?

Frozen fruit's solid growth helps sustain entire fruit market

Specialization and provenance increasingly relevant

Store brands central to parts of the fruit business but growth a mixed bag

Figure 16: Private label versus name brand launches, fruit and fruit snacks, 2013-15\*

Fruit brands occasionally on point with nutritional messaging

### What's Struggling?

Dried fruit's solid image can't stop sales lag

Figure 17: Sun-Maid and Ocean Spray sales for select items in MULO, 2014-15\*

Leading canned/jarred fruit types and brands face declines

Figure 18: Dole and Del Monte sales for select items in MULO, 2014-15\*

### What's Next?

Healthy snack trend will indirectly bolster canned/jarred fruit market

Dried fruit brands further exploit snacking angle as well

Provenance to play increasingly prominent marketing role

### The Consumer – What You Need to Know

Millennial engagement with fruit surpasses vegetables

Fresh and frozen options most appealing for many shoppers

Shelf-stable fruit's image marred by processing and sugar

### Fruit Purchases by Type

For Millennials convenience is the name of the game

Figure 19: Fruit purchases, Millennials vs. all respondents, June 2015

### Household Fruit Consumption

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)

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

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

## Fruit - US - August 2015

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.

Shelf-stable fruit consumption on the rise but among fewer households

Figure 20: Household usage and purchasing – Canned, jarred, or packaged fruit\*, February 2010-March 2015

### Favorable Characteristics

Fresh and frozen options most appealing for many shoppers

Figure 21: Correspondence analysis – Favorable characteristics by fruit type, June 2015

### Negative Characteristics

Fresh fruit's issues lie in the fine print

Figure 22: Correspondence analysis – Negative characteristics by fruit type, June 2015

### Purchase and Consumption Behavior

Fruit's snack-ability is its biggest asset

More on fruit snacking

Figure 23: Purchase and consumption behavior, June 2015

### Attitudes toward Fruit

Core fruit consumers crave the real deal

Figure 24: Attitudes toward fruit, June 2015

Parents and Millennials see benefits of nonfresh options

Figure 25: Additional attitudes toward fruit, June 2015

### Nutritional Info Gathering

Men, Millennials, and parents seek out Internet and word of mouth

Figure 26: Nutritional info gathering, by select demographics, June 2015

### Appendix – Data Sources and Abbreviations

Sales data

Fan chart forecast methodology

Consumer survey data

Correspondence map methodology

Abbreviations and terms

Abbreviations

### Appendix – Market

Market sales and forecast

Figure 27: Total US sales and forecast of fruit, at inflation-adjusted prices, 2010-20

Retail channel sales of packaged fruit

Figure 28: Total US retail sales of packaged fruit, by channel, at current prices, 2010-15

Figure 29: Total US retail sales of packaged fruit, by channel, at current prices, 2013 and 2015

Macroeconomic factors

Figure 30: Unemployment and underemployment rates, January 2011-May 2015\*

Figure 31: Disposable personal income, January 2011-April 2015\*

Figure 32: Consumer Sentiment Index, January 2011-May 2015\*

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)

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

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

## Fruit - US - August 2015

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.

### Appendix – Key Players

Figure 33: MULO sales of canned and jarred fruit, by leading companies and brands, rolling 52 weeks 2014 and 2015

Figure 34: MULO sales of frozen fruit, by leading companies and brands, rolling 52 weeks 2014 and 2015

Figure 35: MULO sales of dried fruit, by leading companies and brands, rolling 52 weeks 2014 and 2015

### Appendix – Consumer

Experian Simmons

Figure 36: Household usage, by type/brand – Canned, jarred, or packaged fruit\*, February 2010-March 2015

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)

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

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)