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Trends in Dried Fruit

April 2023



**For more information, please contact
Tree Top Ingredients at
1-800-367-6571**

Contributing Editor
Justine Olson, Client Success Manager, Mintel



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BFY products shine in dried fruit category

Leading companies lost market share to companies focused on wholesome BFY products and marketing. The dried fruits category is traditionally over indexed by higher-earning households, whose members are more likely to value products by brands that advertise premiumization (see Consumer Segmentation). Bare Foods and Crispy Green both experienced slight gains in this smaller category with their BFY snacking solutions, with 0.5% and 0.4% sales increases respectively. Brands that capitalize on simple, wholesome snacking will stand out to consumers looking for alternatives to products with long ingredients lists and nutrition labels that include added sugars, sodium and saturated fats.



Figure 85: Total US retail sales and forecast of dried fruit, at current prices, 2016-26

Year	\$ billion	% change	Index (2016 = 100)	Index (2021 = 100)
2016	1.31	-	108	82
2017	1.31	0.6	109	82
2018	1.28	-2.5	106	80
2019	1.28	-0.3	106	80
2020	1.42	11.2	118	89
2021	1.49	4.7	123	93
2022 (fore)	1.47	-1.0	122	92
2023 (fore)	1.44	-2.2	120	90
2024 (fore)	1.44	0.3	120	90
2025 (fore)	1.43	-0.8	119	90
2026 (fore)	1.44	0.9	120	90

Source: based on IRI Info Scan® Reviews; US Census Bureau, Economic Census/Mintel



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Source: Mintel Global New Products Database (GNPD)





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Figure 86: Total US retail sales and forecast of dried fruit, at inflation-adjusted prices, 2016-26

Year	\$ billion	% change	Index (2016 = 100)	Index (2021 = 100)
2016	1.47	-	108	92
2017	1.45	-1.5	107	91
2018	1.38	-4.8	102	86
2019	1.35	-2.1	100	85
2020	1.49	9.8	109	93
2021	1.49	0.0	109	93
2022 (fore)	1.41	-5.1	104	88
2023 (fore)	1.35	-4.0	100	85
2024 (fore)	1.33	-1.9	98	83
2025 (fore)	1.29	-2.9	95	81
2026 (fore)	1.27	-1.3	94	80

Source: based on IRI Info Scan® Reviews; US Census Bureau, Economic Census/Mintel

Top Dried Fruit Brands

Brand	2020	2021	2022	2023	Total Sample
Philippine Brand	3.17%	0.72%	8.82%	n/a	3.7%
Nutty & Fruity	1.59%	2.9%	3.92%	n/a	2.78%
Sun-Maid	n/a	2.9%	2.94%	4.76%	2.47%
Anna and Sarah	n/a	5.8%	n/a	n/a	2.47%
Mariani Family	1.59%	4.35%	n/a	n/a	2.16%
Ocean Spray Craisins	4.76%	1.45%	0.98%	4.76%	2.16%
Signature Farms	n/a	1.45%	3.92%	4.76%	2.16%
Alesto by Lidl	n/a	5.07%	n/a	n/a	2.16%
365 Whole Foods Market Organic	3.17%	3.62%	n/a	n/a	2.16%
Giant Eagle	n/a	5.07%	n/a	n/a	2.16%
Total Sample	100.0%	100.0%	100.0%	100.0%	100.0%



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Top Dried Fruit Flavors



Flavour	2020	2021	2022	2023	Total Sample
Mango	15.87%	21.74%	24.51%	23.81%	21.6%
Cranberry	17.46%	10.14%	7.84%	9.52%	10.8%
Strawberry	7.94%	7.25%	13.73%	19.05%	10.19%
Apricot	7.94%	10.14%	2.94%	14.29%	7.72%
Pineapple	3.17%	6.52%	8.82%	9.52%	6.79%
Banana	n/a	7.97%	4.9%	4.76%	5.25%
Prune	9.52%	5.07%	0.98%	9.52%	4.94%
Fig	4.76%	7.25%	2.94%	n/a	4.94%
Raisin	3.17%	4.35%	4.9%	n/a	4.01%
Apple	n/a	2.17%	4.9%	9.52%	3.09%
Total Sample	100.0%	100.0%	100.0%	100.0%	100.0%

Fruit snacks need to be more than just dried fruits; they should offer complex flavor

Consumers snack on fruit snacks for a number of reasons: naturalness, fruits' health credentials and the contribution to fruit/vegetable intake, which are important factors for consumers in a number of countries when shopping for food.

While 49% of US consumers consider dried fruit as snackable, only 11% consider dried fruit as innovative and authentic. With 30% of US consumers considering new flavor as an important salty snack attribute, fruit snacks can be more indulgent with innovative flavors and formats.

ONLY

11%

of US consumers consider dried fruit as innovative and authentic



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KN Kate Naturals Organic Dried Elderberries

Chewy texture and a sweet fruity flavor



Nutty & Fruity Dried Lychee

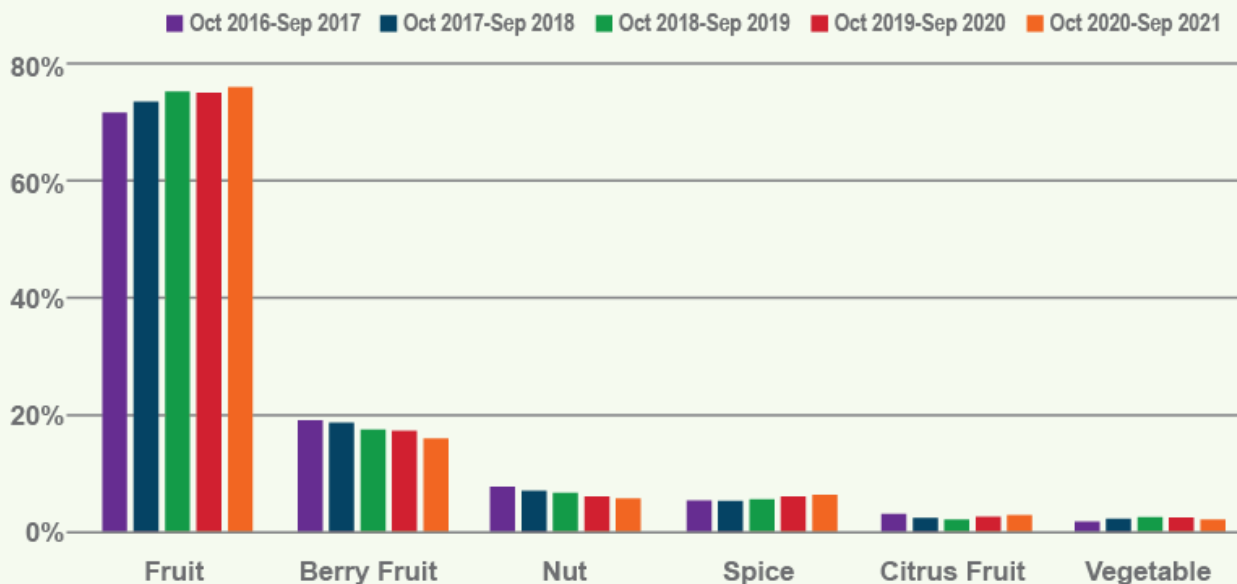
Unsweetened product can be enjoyed on the go or at home



Pamana Dried Tamarind Balls

The sweet product retails in a 3.53-oz. pack

Global: fruit snack launches, by flavor component subgroup, 2016-21



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Flavourscape AI:



Compare the flavor landscape of multiple markets and categories, enabling you to identify gaps and potential opportunities. Using our new landscaping and combinations tools, you can now visualize and analyze flavour trends for your chosen markets and categories in a simple and fast way.

Novel flavours: Flavours that are either new and experimental or focused on very niche products/specific consumer groups.

<p>Fruit</p> <p>Cherry (Sour/Morello/Amarena/Tart)</p> <ul style="list-style-type: none"> 62.3 / 100 Prevalence High Growth Momentum <p>Ranked 1 out of 71 novel flavours</p> <p>Explore flavour >></p>	<p>Spice</p> <p>Ginger</p> <ul style="list-style-type: none"> 61.4 / 100 Prevalence Low Growth Momentum <p>Ranked 2 out of 71 novel flavours</p> <p>Explore flavour >></p>	<p>Fruit</p> <p>Plum</p> <ul style="list-style-type: none"> 60.5 / 100 Prevalence Low Growth Momentum <p>Ranked 3 out of 71 novel flavours</p> <p>Explore flavour >></p>	<p>Fruit</p> <p>Apple (Green)</p> <ul style="list-style-type: none"> 59.6 / 100 Prevalence Low Growth Momentum <p>Ranked 4 out of 71 novel flavours</p> <p>Explore flavour >></p>
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Emerging: Flavours that are just coming into their own, not yet established but not totally experimental either.

<p>Fruit</p> <p>Papaya</p> <ul style="list-style-type: none"> 78.1 / 100 Prevalence Low Growth Momentum <p>Ranked 1 out of 18 emerging flavours</p> <p>Explore flavour >></p>	<p>Spice</p> <p>Salt/Salted</p> <ul style="list-style-type: none"> 77.2 / 100 Prevalence Low Growth Momentum <p>Ranked 2 out of 18 emerging flavours</p> <p>Explore flavour >></p>	<p>Spice</p> <p>Salt (Sea)/Fleur de Sel</p> <ul style="list-style-type: none"> 76.3 / 100 Prevalence Low Growth Momentum <p>Ranked 3 out of 18 emerging flavours</p> <p>Explore flavour >></p>	<p>Fruit</p> <p>Watermelon</p> <ul style="list-style-type: none"> 75.4 / 100 Prevalence Low Growth Momentum <p>Ranked 4 out of 18 emerging flavours</p> <p>Explore flavour >></p>
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Established: Flavours that are not predominant yet but widely available.

<p>Fruit</p> <p>Fruit</p> <ul style="list-style-type: none"> 93.0 / 100 Prevalence High Growth Momentum <p>Ranked 1 out of 17 established flavours</p> <p>Explore flavour >></p>	<p>Nut</p> <p>Coconut</p> <ul style="list-style-type: none"> 92.1 / 100 Prevalence Low Growth Momentum <p>Ranked 2 out of 17 established flavours</p> <p>Explore flavour >></p>	<p>Fruit</p> <p>Apricot</p> <ul style="list-style-type: none"> 91.2 / 100 Prevalence Average Growth Momentum <p>Ranked 3 out of 17 established flavours</p> <p>Explore flavour >></p>	<p>Berry Fruit</p> <p>Berry</p> <ul style="list-style-type: none"> 90.4 / 100 Prevalence Low Growth Momentum <p>Ranked 4 out of 17 established flavours</p> <p>Explore flavour >></p>
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Predominant: Flavours that make up the bulk of the market.

<p>Fruit</p> <p>Mango</p> <ul style="list-style-type: none"> 100.0 / 100 Prevalence Average Growth Momentum <p>Ranked 1 out of 8 predominant flavours</p> <p>Explore flavour >></p>	<p>Fruit</p> <p>Apple</p> <ul style="list-style-type: none"> 99.1 / 100 Prevalence Low Growth Momentum <p>Ranked 2 out of 8 predominant flavours</p> <p>Explore flavour >></p>	<p>Berry Fruit</p> <p>Strawberry</p> <ul style="list-style-type: none"> 98.2 / 100 Prevalence Low Growth Momentum <p>Ranked 3 out of 8 predominant flavours</p> <p>Explore flavour >></p>	<p>Fruit</p> <p>Banana</p> <ul style="list-style-type: none"> 97.4 / 100 Prevalence Low Growth Momentum <p>Ranked 4 out of 8 predominant flavours</p> <p>Explore flavour >></p>
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Fruit snacks haven't changed much over the last five years

Consumers' preference for more interesting snack flavors opens up opportunity for innovation in fruit snacks. Over the last five years, brands have relied on fruit to be the hero ingredient as well as the hero flavor. In fact, the majority of fruit snack launches are focused on the traditional processed dried fruit, natural and with no added sugar. But more can be done to make fruit snacks appeal as a permissible snacking option.

Fruit snacks can explore interesting savoury flavours inspired by milk, tea, herbs or even sauces as seen in salty snacks. This will appeal to 45% of Irish snackers who agree there should be more 'swavoury' snacks available.



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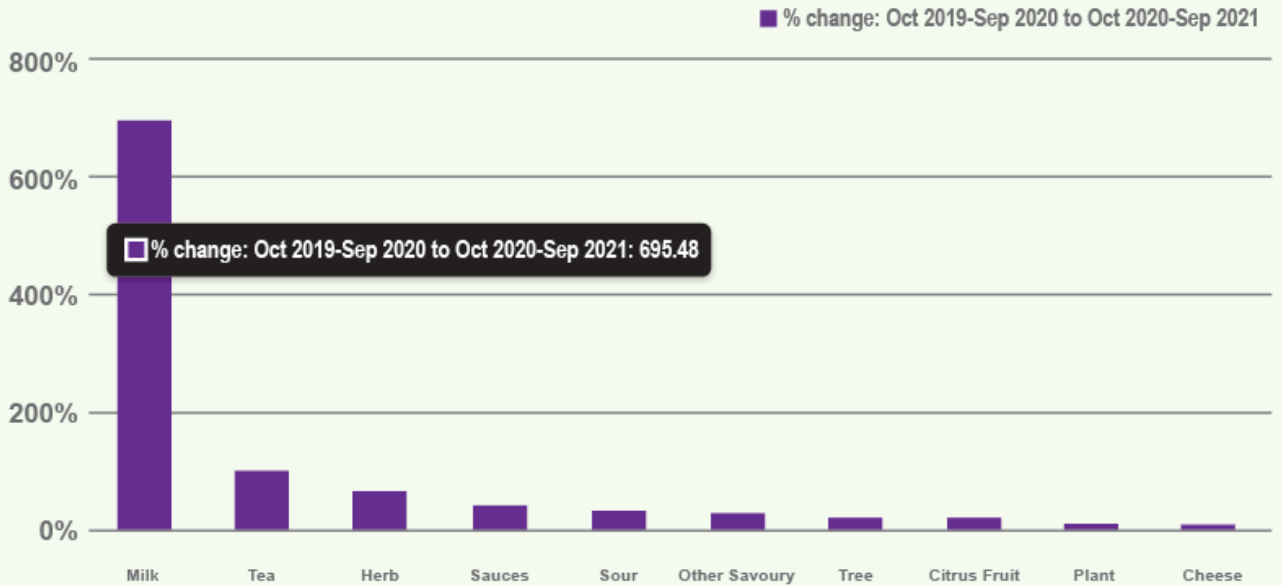
Source: Mintel Global New Products Database (GNPD)





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Global: growth of fruit snack launches, by flavor component subgroup



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Chuza Spicy Strawberry

With 100% Mexican spices



Nutrissimo Chili Lime Seasoned Crispy Dried Apple

It is kosher and halal certified



Nutty & Fruity Chili Mango

Tropical and sweet, and features an explosion of spicy flavors

Break down the nutritional benefits for parents

There has been a lot of focus on digestive health benefits in the baby snack category as digestive issues in babies are common. However, as kids get older, digestive snack offerings become even more limited with only fruit snacks, wheat & grains and rice snacks carrying digestive claims*. A shift in focus to older kids' digestive health can help parents keep their kids healthy. Parents always want what's best for their children but equally need guidance on which snacks are healthy for their children. Snack brands can help guide parents by breaking down ingredients, nutritional profiles and benefits.



Amara Mango Carrots Yogurt Smoothie Melts

Blended with the highest quality veggies and fruits with no added sugar



Yumi Strawberry & Rhubarb Bars

Made with nine superfood veggies



Beech-Nut Apple & Pumpkin Melties

Using the fewest ingredients possible to provide a snack the toddler will love