

FOOD TRENDS SHIFT

Pure Health to Balancing and Experimenting



94%

of consumers* are looking for creative ways to explore a more balanced diet

The 2017 consumer survey showed an increase in the consumption of whole foods, nuts, and good fats, and fewer carbs since 2013.

WALNUTS ARE AN IDEAL INGREDIENT FOR FOOD PROFESSIONALS

Looking to deliver new, creative products without sacrificing flavor, texture or nutrition? Consumers believe walnuts can be used across a wide variety of usage occasions. Cookies, baking mixes, cakes and pastries offer the biggest opportunities for walnut acceptance.

*Consumers Surveyed

Walnut consumers surveyed tend to be more outgoing and adventurous when it comes to trying new foods and eating healthy.



CALIFORNIA WALNUT COMMISSION

The California Walnut Commission (CWC), established in 1987, represents the interests of the 4,800 walnut growers and the nearly 100 handlers spread across California's Central Valley. The industry generates \$1.2 billion in farm gate revenue and supports some 85,000 jobs directly and indirectly.



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METHODOLOGY

The study, conducted by an independent research firm in 2017, fielded an online survey to 3,032 people, providing a sample consistent with gender and regional distribution of walnut users and non-users in the U.S. population. The study's margin of error remains +/- 3.51-3.58% with a confidence interval of 95%.

For more information, please visit walnuts.org/food-professionals

FOOD INDUSTRY INSIGHTS CONSUMER ATTITUDES AND USAGE OF WALNUTS





In 2017 California Walnuts commissioned consumer research to gather insights related to the attitudes, perceptions, and behaviors of consumers and non-consumers of walnuts as they relate to food products.

The study took a deeper dive into understanding how American consumers are making food decisions and how they perceive walnuts. The demand continues for products that are not only delicious, but also nutritious and offer on-the-go convenience.

USING WALNUTS IN PRODUCT INNOVATION

Food Professionals

Explore what's driving consumer perceptions and purchasing habits and develop new offerings that not only taste great but also captivate consumer interest.

The California Walnut Commission serves as a resource for walnut-related educational materials. Please visit walnuts.org/food-professionals for technical usage information, supplier contact information, and formulation ideas.

MILLENNIAL INSIGHTS

Millennials are prioritizing convenience and ease over health and nutrition.

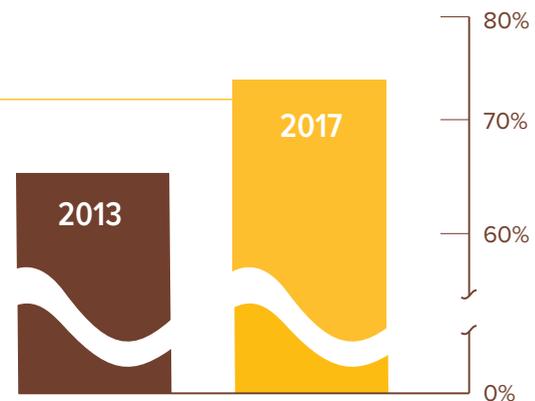
Young Millennials (18-25) do not differ much from other generations when it comes to the way they perceive walnuts.

The biggest difference with Millennials is how they consume media. They search for recipes on Pinterest and Google and prefer using the internet versus visiting a physician for medical advice.

#1 REASON CONSUMERS EAT WALNUTS: TASTE

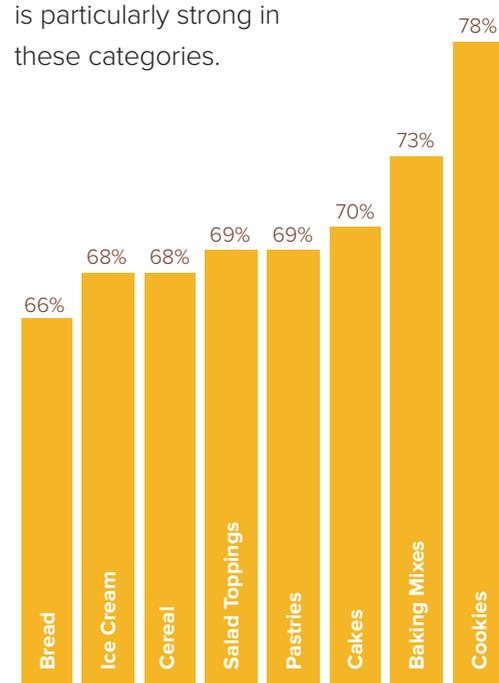
Of those surveyed, the #1 reason people consume walnuts is that they like the taste (78%, up 4% from 2013). People find them more convenient, versatile and a better value than before.

72% WOULD PURCHASE A FOOD PRODUCT KNOWING IT CONTAINS WALNUTS



A Favorable Response to Walnuts in Products

As walnut demand is on the rise due to taste and preference, interest in walnut products is particularly strong in these categories.



STRONG CONSUMER INTEREST IN WALNUT PRODUCTS ACROSS CATEGORIES

Survey Question:

How likely would you be to purchase the following manufactured or pre-made products that contain walnuts?



WALNUTS HAVE STRONG HEALTH PERCEPTIONS

Walnuts are strongly recognized as **nutritious** and **all natural**.

Americans are aware more than ever before of the role walnuts play in health, including heart disease, cholesterol, cancer, diabetes, and male reproductive health.

Walnuts' positive health perceptions strongly impact purchase intent. In 2017, 82% said walnut health benefits impacted their decision to purchase.



ON PACKAGE LABELING OPPORTUNITIES

▶ Heart-specific walnut messaging about walnut products may be a way to engage the health-minded consumer. In 2017, **72%** of participants were likely to purchase food products labeled "heart-healthy"; **65%** if labeled "contains healthy walnuts"; and **63%** if labeled "contains walnuts".

▶ Consumers know **omega-3s** are "good". **87%** of walnut consumers positively perceive omega-3s. Walnuts are the **only nut** with an excellent source of alpha-linolenic acid, or ALA, the plant-based omega-3 fatty acid, with 2.5g/ounce.

Consumer Perceptions of Walnut Nutrition and Health Benefits

