



the state of the
specialty food
industry 2008



SPECIALTY FOOD
PRODUCTS, TRENDS & YOUR BUSINESS IN PERSPECTIVE MAGAZINE

N·A·S·F·T
NATIONAL ASSOCIATION
FOR THE SPECIALTY FOOD TRADE, INC.

Product Segments

DETAILED DEFINITIONS AND BRAND EXAMPLES OF THE 41 SPECIALTY FOOD SEGMENTS RESEARCHED FOR THIS REPORT.

Baking Mixes, Supplies and Flours: Gourmet, ethnic and natural brands. *Natural:* Bob's Red Mill, Sunspire. *Specialty:* Ghirardelli, King Arthur.

Beans, Grains and Rice: Gourmet and ethnic; includes rice mixes and couscous. *Natural:* Lundberg, Ancient Harvest, Arrowhead Mills. *Specialty:* Riceselect, Goya, Nishiki.

Bread and Baked Goods: Artisan, primarily fresh, frozen is included. *Natural:* Rudi's Organic, Food For Life, French Meadow. *Specialty:* Masada Bakery, Just Desserts, Tumarò's.

Candy and Individual Snacks: Gourmet, ethnic; includes jerky items. *Natural:* Green and Black, Endangered Species, Dagoba. *Specialty:* Lake Champlain, Lindt, Divine.

Carbonated, Functional and RTD Tea/Coffee Beverages: Gourmet, ethnic and natural sodas; sparkling juice drinks from traditional water companies, sparkling non-alcoholic juices or celebration drinks. *Natural:* GT Kombucha, Izze, Tazo Tea. *Specialty:* Boylan Natural, San Pellegrino, Orangina.

Cheese and Cheese Alternatives: *Natural:* Organic Valley, Horizon, Tofutti. *Specialty:* Tillamook, Cabot, Athenos.

Chips, Pretzels and Individual Snacks: *Natural:* Kettle Foods, Garden of Eatin', Terra Chips. *Specialty:* Food Should Taste Good, Route 11.

Coffee, Coffee Substitutes and Cocoa: Premium whole-bean and ground coffees sold in supermarkets. *Natural:* Equal Exchange, Green Mountain, Teeccino. *Specialty:* Peet's Coffee, Caffe Sanora, Starbucks.

Cold Cereals: Gourmet and ethnic items. *Natural:* Nature's Path, Kashi, Barbara's Bakery. *Specialty:* Familia, Weetabix, Heartland.

Condiments: Mustard, mayonnaise, ketchup, olive, marinades, soy sauces, pickled vegetables and barbecue sauces. Also includes Asian ethnic varieties. *Natural:* Annie's Naturals, Bragg, Thai Kitchen. *Specialty:* Soy Vay, Chatham Village, Kikkoman.

Conserves, Jams and Nut Butters: Gourmet and ethnic items. *Natural:* Maranatha, Woodstock Farms, Bionaturae. *Specialty:* Stonewall Kitchen, Dickinsons.

Cookies and Snack Bars: Gourmet and ethnic items. *Natural:* Newman's Own Organics, Kashi. *Specialty:* Almondina, Matt's Cookies, Walkers.

Crackers and Crispbreads: Gourmet and ethnic items. *Natural:* Blue Diamond Nut Thins, Late July. *Specialty:* Dr. Kracker, Wasa, San J.

Eggs: Certified-organic and premium products such as free range and Omega-3 fatty acid enhanced. *Natural:* Organic Valley, Chino Valley Ranchers. *Specialty:* Farmer Jon, New Zealand Speckled Hen.

Energy Bars: Lifestyle, wellness and athletic bars. Inherently part of the natural product industry. *Natural:* Lära Bar, Odwalla, Kashi.

Entrées and Mixes: Grain-based rice and couscous mixes, tabouli, pasta dishes, macaroni and cheese. Also shelf-stable ethnic items. *Natural:* Annie's Homegrown, Annie Chun, Back to Nature. *Specialty:* Near East, Simply Asia, A Taste of Thai.

Frozen Desserts: Gourmet ice creams, organic and non-organic, gelatos, Italian ices. High-end frozen desserts. *Natural:* Turtle Mountain, Stonyfield Farm, Tofutti. *Specialty:* Haagen-Dazs, Whole Fruit, Ciao Bella.

Frozen Entrées and Pizzas and Convenience Foods: Pizzas, soups, pasta and convenience foods. *Natural:* Amy's Kitchen, Cedar Lane, Ethnic Gourmet. *Specialty:* Tandoor Chef, Vicolo, Bertoli, Wolfgang Puck.

Frozen Fruits and Vegetables: Organic, premium and ethnic brands. *Natural:* Cascadian Farms, Woodstock Farms, Alexia. *Specialty:* Wyman, Willamette Valley Fruit, Remlinger.

Frozen Juices and Beverages: Organic, premium, natural brands. *Natural:* Cascadian Farms, Tree of Life. *Specialty:* Just Pikt, Seneca.

Frozen/Refrigerated Meat, Poultry and Seafood: Pre-packaged, sold in standard uniform weights, with UPC codes. Does not include random weight products sold at butcher/seafood counters or retailer-packed. Also does not include jerkies.

Hot Cereals: Rolled oats, grits, farina (both instant and non) from regional

or imported producers; premium natural companies. *Natural:* Bob's Red Mill, Kashi, Nature's Path. *Specialty:* McCann's, Old Wessex, Red River.

Milk, Half and Half, Cream: Organic, sheep, goat and small-craft creameries. *Natural:* Organic Valley, Horizon, Meyenberg. *Specialty:* Valley View, Hurnboldt Creamery, Oberweis.

Nuts, Seeds, Dried Fruits and Trail Mixes: Organic and natural brands. Includes Asian ethnic foods such as dried seaweed. *Natural:* Just Tomatoes, Eden Foods, Himalania. *Specialty:* Delightfully Turkish, San Joaquin, Poindexter Nut.

Oils (cooking): Olive, flavored and sesame oils. *Natural:* Spectrum Naturals, Napa Valley, Bionaturae. *Specialty:* Colavita, Lucini Italia, Bertoli.

Other Dairy: Premium and imported products. European and organic butters, ricotta cheese and crème fraîche. *Natural:* Organic Valley, Horizon, Earth Balance. *Specialty:* Tillamook, Cabot, Kerrygold.

Puddings and Shelf-Stable Desserts: Gourmet and ethnic brands; syrups and toppings. *Natural:* Zensyo, Ah!laska, Natural By Nature. *Specialty:* Oetker, Elyon, Fudge Fatale.

Refrigerated Juices and Functional Beverages: Premium fresh juices, enhanced, functional drinks. *Natural:* Odwalla, Naked Juice, Bossa Nova. *Specialty:* Simply Orange, Zeiglers, Champlain Orchards.

Refrigerated Sauces, Salsas and Dips: Includes pasta sauces, hummus and baba gannoush. *Natural:* Emerald Valley Kitchen, Blue Moose, Yorgos. *Specialty:* Cibo, Basha Foods, Athenos Tribe.

Rice Cakes: All-natural brands, full-size and mini bite-sized. Inherently part of the natural product industry. *Natural:* Lundberg, Mothers, Real Foods Australia.

Seasonings: Spices, spice mixes (foil packets), baking flavors, salt. *Natural:* Frontier, Simply Organic, Spice Hunter. *Specialty:* Morton and Bassett, Magic Seasoning Blends, Celtic Sea.

Shelf-Stable Fruits and Vegetables: Gourmet, ethnic and natural canned vegetables, beans and fruit. Also fruit sauces. *Natural:* Muir Glenn, Westbrae, Eden. *Specialty:* Wyman, Leroux Creek, Goya.

Shelf-Stable Juices and Functional Drinks: Premium, natural and organic brands, plus kosher brands. *Natural:* RW Knudsen, Lakewood, Santa Cruz Organic. *Specialty:* Martinelli's, Volcano, Looza.

Shelf-Stable Meat, Poultry and Seafood: Gourmet and premium canned fish and shellfish, caviar, etc., imported and domestic. *Natural:* Natural Sea, Wild Planet. *Specialty:* Crown Prince, Bela Olhao, Geisha.

Shelf-Stable Pastas: Imported and domestic, gourmet ethnic and natural items. *Natural:* Bionaturae, Tinkyada, Hodgson Mill. *Specialty:* De Cecco, Al Dente, Barilla.

Shelf-Stable Sauces, Salsas and Dips: Includes pasta sauce, hummus and baba gannoush. *Natural:* Muir Glenn, Green Mountain Gringo, Amy's Kitchen. *Specialty:* Desert Pepper, Classico, Emeril's.

Soup: Ready-to-serve, cups, mixes and instant. Also includes miso, bouillon and ramen-type items. *Natural:* Pacific Natural Foods, Amy's Kitchen, Health Valley. *Specialty:* Wolfgang Puck, Bear Creek, Better than Bouillon.

Sweeteners: Pure maple syrups, honey and alternative sweeteners such as agave, sucanat, turbinado. *Natural:* Spring Tree, Wholesome Sweeteners, Madhava. *Specialty:* Anderson's Maple Syrup, Kallas, Uwharrie.

Teas: All-natural, as well as premium and exotic varieties, including African Red (Rooibos) and mate from South America. Also brands that offer imported varietals, such as Assam or oolong. *Natural:* Yogi Tea, Traditional Medicinals, Tazo. *Specialty:* Bigelow, Twinings, Taylors of Harrogate.

Water: Premium brands as well as functional, enhanced waters that don't contain artificial ingredients. *Natural:* Penta, Fiji, Metromint. *Specialty:* San Pellegrino, Gerolsteiner, Sanfaustino.

Yogurt and Kefir: Ethnic and cultured dairy and non-dairy products; sheep, goat and water buffalo yogurts. *Natural:* Stonyfield, Brown Cow, Lifeway. *Specialty:* Fage, Woodstock Water Buffalo, Emmi.