

New Product Introductions

October 2020



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2019 Report Objectives & Approach

- **Objective:** Track new product introductions to assess honey's role and inclusion in product innovation.
- **Approach:** Report on the following KPI's as identified in the strategic plan:
 - Total New Product Introductions with honey
 - Honey's share of key category introductions:
 - Cereal
 - Bakery
 - Spreads
 - Alcoholic Beverages
 - Sauces & Seasonings
 - Cold Beverages
 - For all categories we will report:
 - Total number of products with honey
 - Percent change of products with honey from the previous year
 - Honey's share of category introduction



Methodology & Considerations

How to read this report:

- This report includes the following core honey derivatives (among other nuance forms not listed, within specific categories):
 - Honey Flavor
 - Natural Honey Flavor
 - Pure Honey
- Data is based on new introductions only (distribution or sales is unknown); therefore, the findings should NOT be used to project volume.
- New honey product introductions are tracked where honey (and the derivatives above) are listed as an *ingredient*, with the exception of the alcoholic beverage category.
- Because many alcoholic beverages do not list ingredients, this section tracks all products that state the word “honey” anywhere on pack. For this reason, honey introductions in this category may be slightly overstated as honey is often used to describe the color or smell of a product when it in fact, does not include honey as an ingredient.
- Innova also does not capture all craft brewery introductions as brands may not distribute at major retailers.



- Indicates data reflects national new product introductions



- Indicates data reflects new product introductions with honey

Methodology & Considerations

Data in this report is obtained from Innova Market Insight Food & Beverage Database (Innova).

About Innova:

Innova is the world's biggest food industry database and contains over 120 million unique records on food products, brands, ingredients, claims, packaging, etc. Over 275,000 new products are added to the database every year.

Innova monitors 78 major markets in detail and has full-time employees in all major markets reporting on trends as well as undertaking store, product and brand assessments.



Database Optimization:

Data in this report is updated year over year, and absolute numbers shift as Innova performs general database maintenance.

For example, the sugar and sweetener category was revised in 2017 to include more synonyms for sweeteners and ingredients with multiple names. This expands the number of products appearing in any given search for honey.

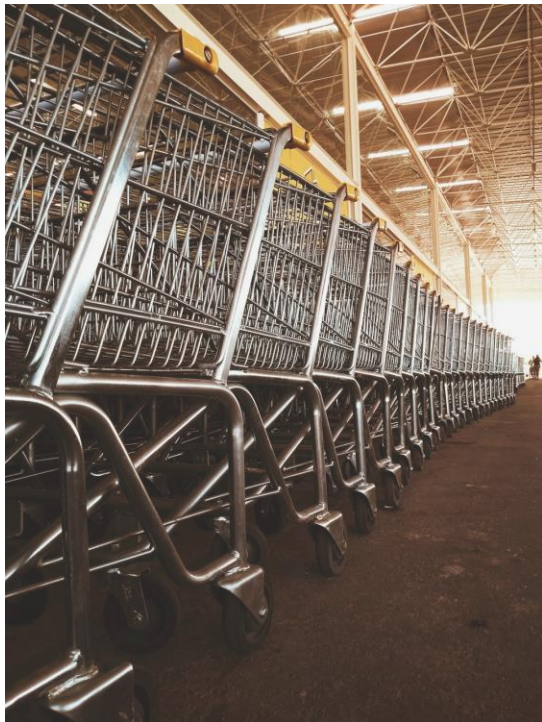
Innova also created 65 new product subcategories from August 2018-Feb 2019 for the benefit of our users, in order to present the data in a more granular and insightful way. Definitions were updated to existing product subcategories, as categories are also dynamic, and they have to track and capture the changes.

The background image shows a row of wooden beehives in a field of sunflowers. The entire image is covered with a semi-transparent orange gradient. A white dotted line starts from the left edge, curves upwards and then downwards, ending near the first beehive. The text "Executive Summary" is written in a large, white, sans-serif font on the right side of the image.

Executive Summary



New Product Introductions



Total new product introductions in the U.S. experienced a slight increase in growth from 2018 (+3%).

New honey product introductions experienced a slight increase in growth in 2019 (+5% pts), outpacing total food growth.

Honey still represents 3.9% share of all food introductions, flat from 2018.





Key Category Movement

We see a lot of innovation progress in key categories essential to honey, such as bakery, sauces, alcoholic beverages (each 8-9% of all NP introductions). Additionally, snacks, cold drinks and to a lesser extent cereal reflect 3-6% of all NP launches.

Unfortunately, new products with honey are down year-over-year in many these categories, except sauces & seasonings and alcoholic beverages.





Increasing Competition from “Alternative” Sweeteners

While granulated/cane sugars still dominate introductions in most categories, we are seeing Stevia, Monk Fruit, Coconut Sugar, Agave and Maple Syrup growing at a significant pace and gaining share.

This is happening in traditional categories like cereal and bakery, and we even saw monk fruit overtake honey introductions in cold beverages, showing it is a true competitor, not just an emerging threat.



Honey Share of Categories - 2019

Category	Share of all Food Intros	Category % Change	Share of All Honey Introductions	Honey % Change	Sweetener Competitor	Growing Sweetener Competitor
Bakery	8.9%	-3%	12.8%	-18%	Sugar - Granulated, Cane & Brown	Stevia & Monk Fruit
Alcoholic Beverages*	8.4%	7%	15.1%	27%	Cane Sugar & Granulated Sugar	Stevia
Sauces & Seasonings	7.9%	-7%	8.8%	11%	Sugar - Granulated, Cane & Brown	-
Cereal	3.6%	-1%	19.8%	-6%	Granulated Sugar & Cane Sugar	Stevia & Monk Fruit
Snacks	6.5%	0%	9.1%	14%	Sugar - Granulated, Cane & Brown	Maple Syrup
Cold Drinks	5.9%	-2%	3.9%	-9%	Sugar, Stevia, Monk Fruit	-
Spreads	2.2%	6%	7.4%	-6%	Granulated & Cane Sugar	Maple Syrup & Brown Sugar

*Honey mentioned anywhere on pack

Metrics Dashboard – 2019 Data Updated with 2020 Report

Key Tracking Metrics YOY		
	2018	2019
New Products with Honey		
Total New Product Introductions with Honey	1667	1755
Percent Change from Previous Year	-4%	5%
Share of Total U.S. Introductions	3.8%	3.9%
Cereal with Honey		
Cereal Products with Honey	369	348
Percent Change from Previous Year	-7%	-6%
Share of Category Introductions	22.3%	21.2%
Bakery with Honey		
Bakery Products with Honey	273	225
Percent Change from Previous Year	-4%	-18%
Share of Category Introductions	6.6%	5.6%
Spreads with Honey		
Spread Products with Honey	138	130
Percent Change from Previous Year	+18%	-6%
Share of Category Introductions	14.4%	12.7%

Key Tracking Metrics YOY		
	2018	2019
Sauces and Seasonings with Honey		
Hot Drink Products with Honey	140	155
Percent Change from Previous Year	-1%	11%
Share of Category Introductions	3.6%	4.3%
Cold Drinks with Honey		
Cold Drink Products with Honey	76	69
Percent Change from Previous Year	-17%	-9%
Share of Category Introductions	2.8%	2.6%
Alcoholic Beverages with Honey (honey anywhere on pack)		
Alcoholic Beverages with Honey	244	310
Percent Change from Previous Year	+9%	27%
Share of Category Introductions	6.8%	8.1%



Deep Dive



TOTAL NEW US PRODUCTS

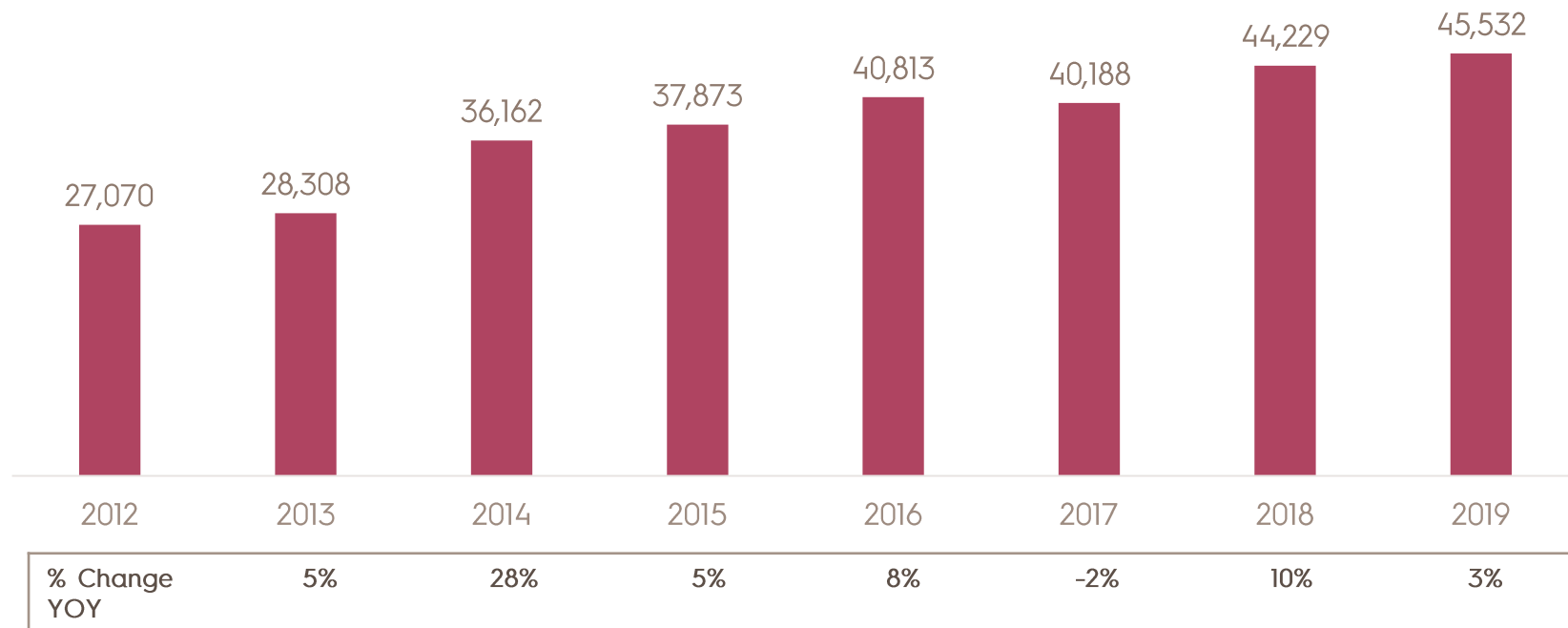
TOTAL NEW HONEY PRODUCTS



National Food Introductions

In 2019, total new product introductions in the United States saw a 3% increase from 2018.

Total U.S. Introductions (2012-2019)





National Food Introductions – By Category

Alcoholic beverages, spreads and deserts & ice cream experienced growth in new product introductions vs YA. Bakery, alcoholic beverages, sauces, and snacks leads in number of new product introductions ~ 3000-4000 annually.

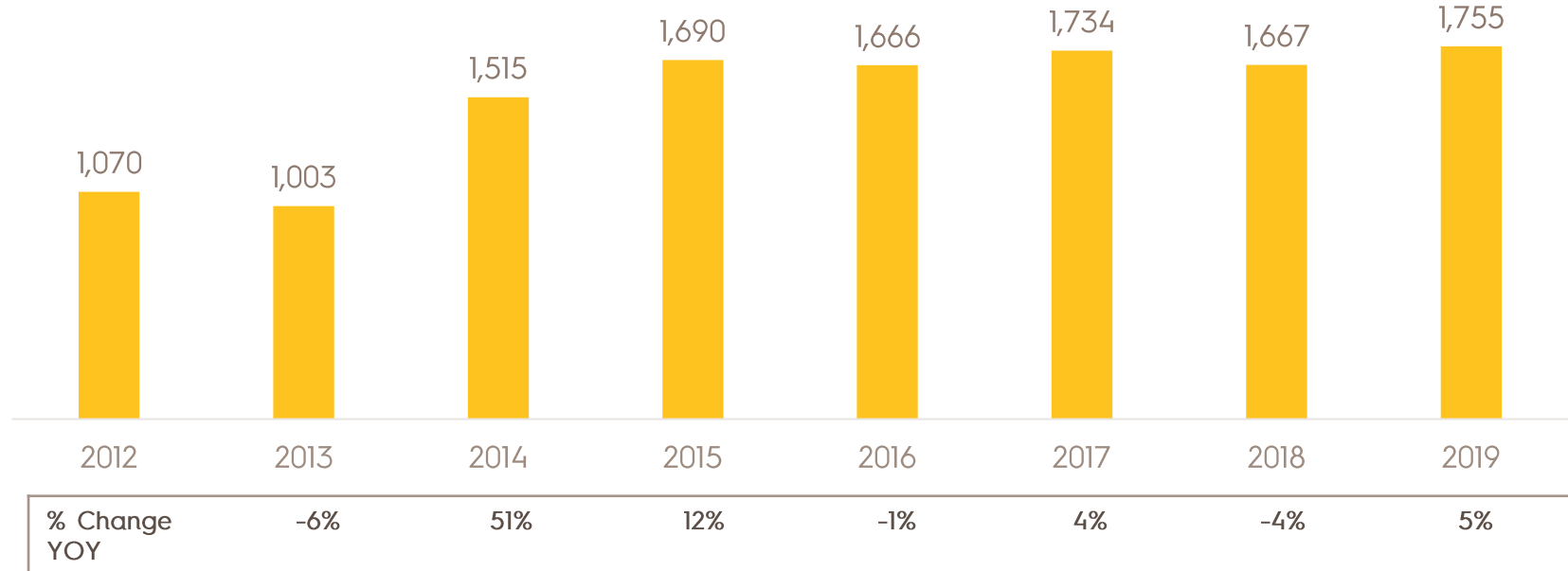
U.S. Food Introductions by Category: Change from 2018-2019										
Category	2012	2013	2014	2015	2016	2017	2018	2019	% Change 2018-2019	Share of All New Introductions in 2019
Bakery	2,671	2,603	3,509	3,767	3,664	4,091	4,160	4,044	-3%	8.9%
Alcoholic Beverages	1,499	2,094	2,202	1,764	2,816	3,064	3,593	3,828	7%	8.4%
Sauces & Seasonings	1,641	2,188	2,843	3,691	4,134	3,806	3,879	3,618	-7%	7.9%
Snacks	1,471	1,406	2,063	2,560	2,446	2,625	2,951	2,964	-	6.5%
Cold Drinks	1,703	2,616	2,490	2,497	2,353	2,280	2,735	2,683	-2%	5.9%
Cereals	1,053	985	1,434	1,510	1,621	1,606	1,656	1,643	-1%	3.6%
Desserts & Ice Cream	1,125	996	1,141	1,189	1,206	1,178	1,275	1,335	5%	2.9%
Spreads	473	520	798	913	887	878	959	1,021	6%	2.2%
Sugar & Sweeteners	109	150	198	228	193	193	159	158	-1%	0.3%
Total	27,070	28,308	36,162	37,873	40,813	40,188	44,229	45,532	3%	

National Honey Introductions

New honey product introductions experienced a slight increase in growth in 2019 (+5% pts), outpacing total new food introductions (+3%).



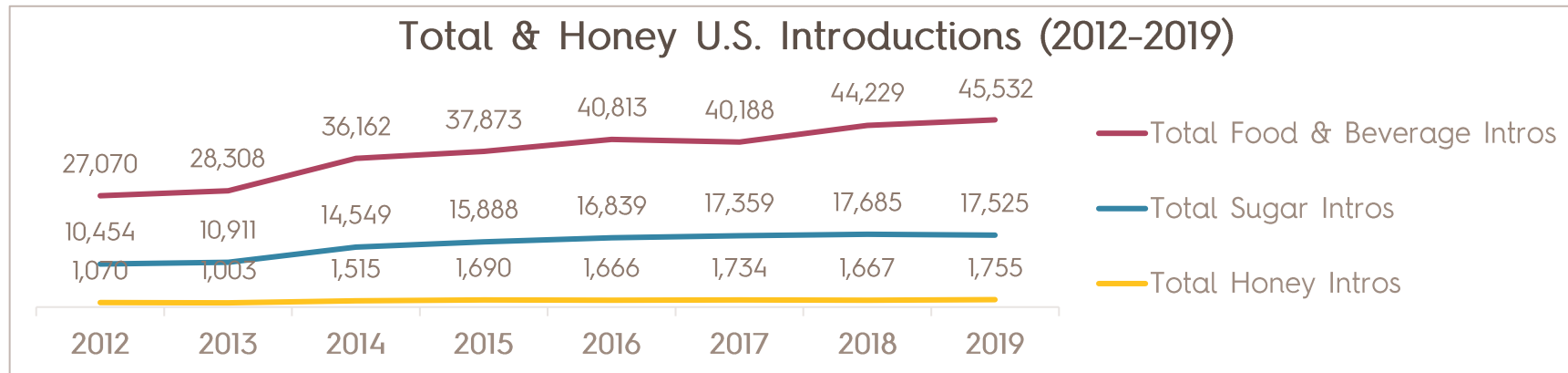
U.S. Honey Introductions (2012-2019)



National Honey Introductions



Of the ~45,000 new products introduced in 2019, honey as an ingredient continues to be included in ~4% of all introductions (1,755).



"Sugar" Share of New Product Intros							
2012	2013	2014	2015	2016	2017	2018	2019
38.6%	38.5%	40.2%	42.0%	41.3%	43.2%	40.0%	38.4%

Honey Share of New Product Intros							
2012	2013	2014	2015	2016	2017	2018	2019
4.0%	3.5%	4.2%	4.5%	4.1%	4.3%	3.8%	3.9%

National Honey Introductions – By Category



U.S. Honey Introductions by Category										
Category	2012	2013	2014	2015	2016	2017	2018	2019	% Change 2018-2019	Share of All Honey Introductions in 2019
Cereals	257	271	366	404	349	396	371	348	-6%	19.80%
Alcoholic Beverages*	81	155	149	99	255	224	244	310	27%	15.10%
Bakery	175	141	257	254	263	283	273	225	-18%	12.80%
Sauces & Seasonings	90	89	149	156	157	141	140	155	11%	5.90%
Snacks	43	52	89	116	129	127	140	159	14%	9.10%
Spreads	41	55	71	98	145	117	138	130	-6%	7.40%
Ready Meals & Side Dishes	69	67	123	87	82	75	104	108	4%	6.20%
Confectionery	77	68	58	108	101	127	94	104	11%	5.90%
Meat, Fish & Eggs	37	22	67	69	74	72	91	72	-21%	4.10%
Dairy	59	57	61	108	65	101	85	90	6%	5.10%
Cold Drinks	47	46	81	81	66	92	76	69	-9%	3.90%
Sports Nutrition	30	23	24	29	23	21	58	73	26%	4.20%
Supplements	13	21	20	60	45	29	53	51	-4%	2.90%
Desserts & Ice Cream	51	43	55	51	46	43	47	67	43%	3.80%
Pet Food	46	21	39	34	37	72	41	60	46%	3.40%
Baby & Toddlers	3	3	9	0	7	5	11	8	-27%	0.50%
Hot Drinks	14	10	21	21	40	13	8	10	25%	0.60%
Fruit & Vegetables	2	5	10	2	8	5	8	10	25%	0.60%
Soup	5	3	5	8	8	4	9	3	-67%	0.20%
Total	1,070	1,003	1,515	1,690	1,666	1,734	1,667	1,755	5%	100.0%

National Honey Introductions – By Category



Cereals, alcoholic beverages, and bakery remain the top categories for new honey introductions with sauces and seasonings not falling far behind.

New Honey Introductions by Category*



Top New Honey Introductions by Category

	2012	2013	2014	2015	2016	2017	2018	2019	% Change 2018-2019
Cereals and Bars	257	271	366	404	349	396	369	348	-6%
Alcoholic Beverages*	81	155	149	99	255	224	244	310	27%
Bakery	175	141	257	254	263	283	273	225	-18%
Sauces & Seasonings	90	89	149	156	157	141	140	155	11%
Spreads	41	55	71	98	145	114	138	130	-6%
Cold Drinks	47	46	81	81	66	92	76	69	-9%

*Honey mentioned anywhere on pack

A top-down view of a white bowl with a black rim, filled with granola and coconut flakes. The bowl is surrounded by a large pile of the same granola mixture on a dark, textured surface. A gold-colored spoon is partially visible, resting in the granola to the right of the bowl. A semi-transparent yellow rectangular box with a thin white border is centered over the bowl, containing the text "CEREAL SECTION (INCLUDES GRANOLA & BARS)".

CEREAL SECTION (INCLUDES GRANOLA & BARS)

Categories of Interest – Cereal & Bars

While this category continues to own the largest share of new honey product introductions at 20%, new product launches dipped for the second year in a row (-6%).



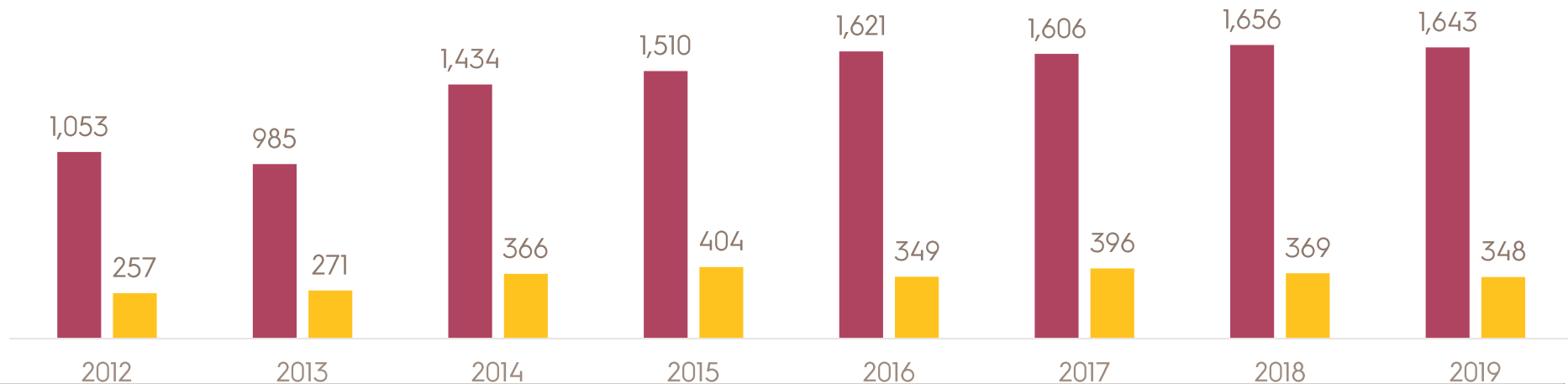
Despite a slip in new honey product introductions, honey has an opportunity to steal share from other natural sweeteners such as stevia, monk fruit, and maple syrup who all experienced growth.

Total Cereal/Bar & Honey Introductions in the Category



Both total new cereal introductions and honey introductions experienced a slight decline from 2018.

Total Cereal/Bar Introductions and Honey Introductions in the Category (2012-2019)



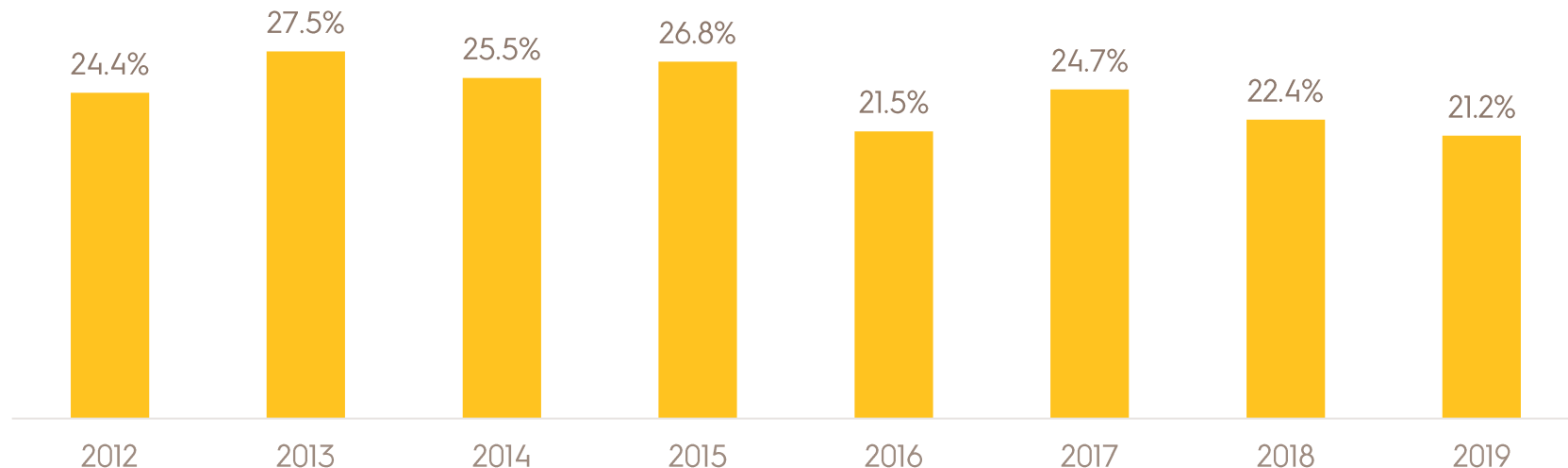
% Change YOY (Total Cereal/Bars)	-6%	46%	5%	7%	-1%	3%	-1%
% Change YOY (Cereal w/ Honey)	5%	35%	10%	-14%	13%	-7%	-6%

Honey Share of Cereal/Bar Introductions



Growth of honey within the category decreased slightly (21%), bringing honey introductions closer to 2016 levels.

Honey Share of New Cereal/Bar Intros (2012-2019)



New Product Ingredient Comparison – By Category



Within the cereal category, honey remains in the top three ingredients used in new products. Stevia, monk fruit, and agave saw significant growth compared to 2018.

Cereal Category									
<i>Ingredient</i>	<i>2012</i>	<i>2013</i>	<i>2014</i>	<i>2015</i>	<i>2016</i>	<i>2017</i>	<i>2018</i>	<i>2019</i>	<i>% Change 2018-2019</i>
Granulated Sugar	611	647	792	845	849	854	837	731	-13%
Cane Sugar	65	75	179	189	226	329	426	382	-10%
Honey	257	271	366	404	349	396	369	348	-6%
Brown sugar	138	143	199	187	195	223	172	159	-8%
Stevia	12	15	43	51	45	60	87	133	53%
Monk fruit	4	5	10	24	26	26	47	85	81%
Maple Syrup	46	44	50	79	77	90	72	83	15%
Coconut Sugar	7	10	22	38	54	31	74	69	-7%
Agave	93	62	115	98	113	59	41	61	49%

Cereal/Bars with Honey – New Product Examples



UHC	Kroger
Company	Harris Teeter
Description	Lightly sweetened corn and whole wheat flakes with granola oat clusters, in a plastic packet held in a carton box.
Claims Features	Contains 150 calories per cup. With 6 essential vitamins and minerals. Low fat. Wholegrain council logo. Naturally flavored. Together in education logo. Your plus guarantee. Certified kosher.
Ingredients	Corn, wholegrain wheat, sugar, wholegrain rolled oats, rice, canola oil, corn syrup, salt, barley malt extract, cinnamon, molasses, honey , caramel color, natural flavor, vitamins and minerals: ferric orthophosphate source of iron, niacinamide vitamin B3, zinc oxide source of zinc, thiamine mononitrate vitamin B1, calcium pantothenate a B vitamin, pyridoxine hydrochloride vitamin B6, folic acid.

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UHC	Post Holdings
Company	Post Consumer Brands
Description	Crispy crunchy, lightly sweet honey almond oat blenders cereal in a plastic packet held in a carton box. A delectable cereal you will love. Delicious wholegrain oat clusters, a touch of real honey and sliced almonds add up to a bowl of deliciousness that puts sunshine in every day.
Claims Features	Contains 12g wholegrain per 1 cup serving. Naturally flavored. Love it or its free. With a bountiful blend of essential vitamins and minerals make it an all-round winner. High quality ingredients. Premium products at a fair price. Partially produced with genetic engineering. Wholegrain council logo. Certified kosher.
Ingredients	Corn, wholegrain wheat, sugar, wholegrain rolled oats, almonds, rice, canola oil, corn syrup, salt, barley malt ext, cinnamon, molasses, honey , caramel color, natural flavor, vitamin and minerals: ferric orthophosphate (source of iron), niacinamide (vitamin B3), zinc oxide (source of zinc), thiamine mononitrate (vitamin B1), calcium pantothenate (a b-vitamin), pyridoxine hydrochloride (vitamin B6), folic acid.

Cereal/Bars with Honey – New Product Examples



UHC	General Mills
Company	General Mills
Description	Leave the spoon behind and take your favorite cereal with you on-the-go with honey nut Cheerios treat bars. Wholesome and made with golden honey, they'll be an instant family favorite and a snack-time win. Comes in eight plastic packets held in a carton box.
Claims Features	Naturally flavored. Contains 100 calories per bar.
Ingredients	Cereal (wholegrain oats, sugar, oat bran, cornstarch, honey , brown sugar syrup, salt, calcium carbonate, tripotassium phosphate, canola oil, natural almond flavor, vitamin E [mixed tocopherols] added to preserve freshness, vitamins and minerals, calcium carbonate, vitamin C [sodium ascorbate], a B vitamin [niacinamide], zinc and iron [mineral nutrients], vitamin B6 [pyridoxine hydrochloride], vitamin B2 [riboflavin], vitamin B1 [thiamine mononitrate], vitamin A [palmitate], a B vitamin [folic acid], vitamin B12, vitamin D3), sugar, crisp rice (rice flour, barley malt extract, salt), tapioca syrup, corn syrup, canola oil, palm and or palm kernel oil, fructose, contains 2% or less of, vegetable glycerin, almond butter, whey protein concentrate, calcium carbonate, maltodextrin, nonfat dry milk, sorbitol, soy lecithin, whey powder, salt, reduced minerals whey, gelatin, color



UHC	Pepsico
Company	Quaker Oats Company
Description	Five individually wrapped banana honey nut crispy baked snack bar flats, in a carton box.
Claims Features	Made with 20g wholegrains. No high fructose corn syrup. Satisfying energy. Good source of fiber. No artificial flavors or added colors. Quaker, a brand you can trust and flavors you love. Each pack of three contains 20g wholegrain and provides the fiber and energy you want to help keep you going. With real fruit pieces, nuts and flaxseed. Quaker values their communities and are continually on the lookout for ways to Quaker's environmental impact especially in areas of farming, manufacturing and shipping. Join Quaker to take better care of the Earth. Wholegrain council logo. Certified kosher. Recyclable paper box.
Ingredients	Wholegrain oat flour, wholegrain oats, brown sugar, whole wheat flour, sunflower oil (with tocopherols to preserve freshness), banana flakes, flaxseed, honey , sugar, amaranth, organic flaxseed oil, natural almond flavor, organic vanilla extract, organic

Cereal/Bars with Honey – New Product Examples



UHC	General Mills
Company	General Mills
Description	Sweetened multigrain cereal with wholegrain oats. Comes in a plastic packet held in a carton box.
Claims Features	More than 1/2 of the daily recommended wholegrain. Contains 9 vitamins and minerals. Good source of fiber. No artificial flavors or colors. Family size. Nutritious, hearty and simple delicious. Contains bioengineered food ingredients. 100% recycled paperboard.
Ingredients	Wholegrain oats, sugar, wholegrain corn, modified cornstarch, canola oil, cornstarch, honey , wholegrain rice, corn bran, wholegrain sorghum, wholegrain millet, salt, tripotassium phosphate, baking soda, color (caramel color and annatto extract), natural flavor, vitamin E (mixed tocopherols) added to preserve freshness, vitamins and minerals: calcium carbonate, iron and zinc (mineral nutrients), a B vitamin (niacinamide), vitamin C (sodium ascorbate), a B vitamin (calcium pantothenate), vitamin B6



UHC	Aldi
Company	Aldi
Description	Honey graham's cereal in a plastic packet held in a carton box.
Claims Features	Essential goodness. No artificial flavors or rich fructose corn syrup. No certified artificial colors, or artificial preservatives. Wholegrain council logo. Recyclable packaging.
Ingredients	Whole grain wheat, sugar, corn meal, canola oil, molasses, fructose, salt, honey , baking soda, calcium carbonate, soy lecithin, dextrose, trisodium phosphate, rosemary extract (antioxidant), vitamins and minerals, ferric orthophosphate (source of iron), niacinamide (vitamin B3), zinc oxide, pyridoxine hydrochloride (vitamin B6).

Cereal/Bars with Honey – New Product Examples



UHC	Creative Snacks Company
Company	Creative Snacks Company
Description	Honey pecan bite sized yogurt parfait in a 284g resealable plastic pouch.
Claims Features	No artificial anything. Made by hand. A snack for breakfast and beyond. Certified kosher.
Ingredients	Honey pecan granola (whole grain oats, honey , fully refined canola oil, brown sugar [sugar, cane syrups], pecans, egg whites, flour [unbleached wheat flour, malted barley flour, niacin, iron, thiamine mononitrate, riboflavin, folic acid], water, salt, natural vanilla flavor, cinnamon), yogurt coating (sugar, palm kernel oil, yogurt powder [cultured whey protein concentrate, cultured skimmed milk], milk, soy lecithin [an emulsifier], natural flavor, salt).

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UHC	Mckee Foods
Company	Mckee Foods
Description	Ten individually wrapped oats and honey chewy granola bars. Comes in a carton box.
Claims Features	No preservatives. No high fructose corn syrup. With 8g wholegrain per serving. Quality, freshness and taste. Sunbelt bakery is proud to continue their support of National Breast Cancer Foundation in its efforts to increase breast cancer awareness. Certified kosher. Recyclable packaging.
Ingredients	Granola (wholegrain rolled oats, sugar, palm kernel and soybean oil, corn syrup, coconut, honey , molasses, soy lecithin, salt, cornstarch, peanuts, almond, soy flour, egg whites), corn syrup, crisp rice (rice flour, sugar, whey, salt, barley malt, wheat flour, dextrose), palm kernel and soybean oil, water, nonfat dry milk, sorbitol, soy lecithin, salt, sugar, carageenan.

Cereal/Bars with Honey – New Product Examples



UHC	Kind
Company	Kind
Description	Ten individually wrapped nut bars varieties, in a carton box.5 of each flavor: dark chocolate nuts and sea salt and caramel almond and sea salt.
Claims Features	90 calories per bar. Gluten free. Low glycemic index. No genetically engineered ingredients. Low sodium. Good source of fiber. With 3g sugar. Certified kosher. FSC certified. Recyclable packaging.
Ingredients	Dark chocolate nuts and sea salt: almonds, peanuts, chicory root fiber, honey, palm kernel oil, sugar, glucose syrup, rice flour, unsweetened chocolate, alkalized cocoa, sea salt, soy lecithin, natural flavor, cocoa butter, caramel almond and sea salt: almonds, chicory root fiber, honey, glucose syrup, palm kernel oil, sugar, rice flour, milk powder, sea salt, carob powder, soy lecithin, natural flavor, annatto

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UHC	The J M Smucker Company
Company	The J M Smucker Company
Description	Five individually wrapped heroic honey granola bar stacked with 3 layers, in a carton box.
Claims Features	Jif power ups soft baked bars contain 180 calories per bar. Made with peanuts as the first ingredient. No corn syrup. With 5g of protein and 2g fiber per serving. Certified kosher
Ingredients	Peanuts, sugar, rolled oats, brown rice syrup, palm and palm kernel oils, glycerine, enriched flour peat flour, niacin, iron, thiamine monohydrate, riboflavin, folic acid), peanut powder, rice flour, honey, tapioca solids, nonfat dry milk, contains 2% or less of: salt, natural flavor, peanut oil, tocopherols (antioxidant), calcium carbonate, soy lecithin, annatto and red cabbage extract (for color), malt (barley), distilled monoglycerides, soybean oil, malted



BAKERY

Categories of Interest – Bakery



Total bakery introductions declined slightly while honey introductions decreased significantly from YA. Bakery is the second largest category for honey innovation, at 13%.

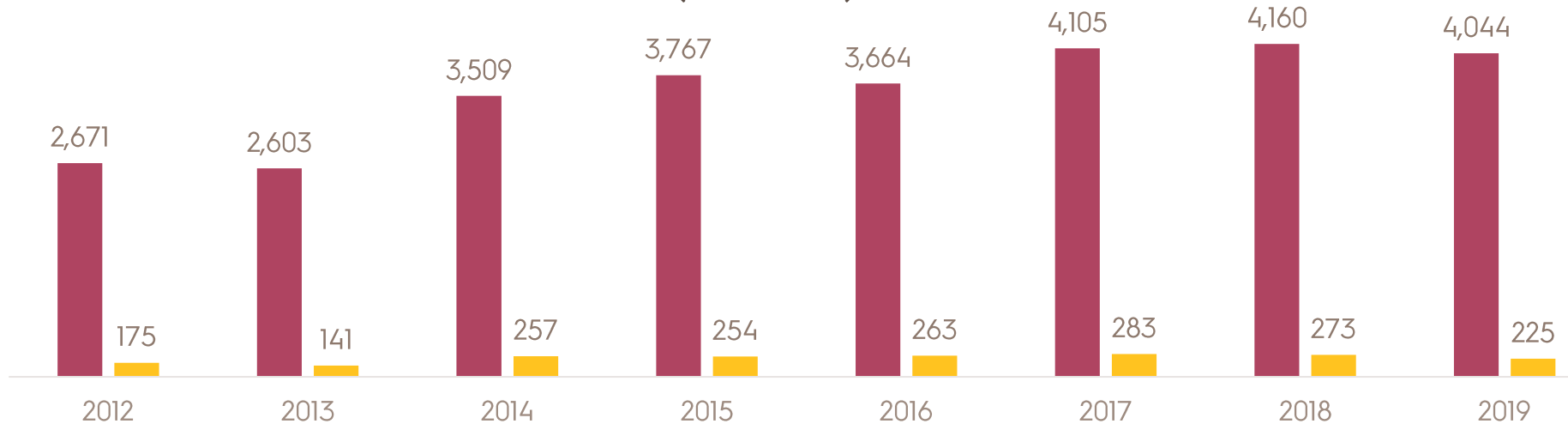
Sugar remains its biggest competitor, especially in baked snacks and desserts. Honey should continue to promote its positive health benefits in this space.

Total Bakery & Honey Introductions in the Category



Total bakery introductions declined slightly from 2018-2019, honey introductions decreased significantly from last year.

Total Bakery Introductions and Honey Introductions in the Category (2012-2019)



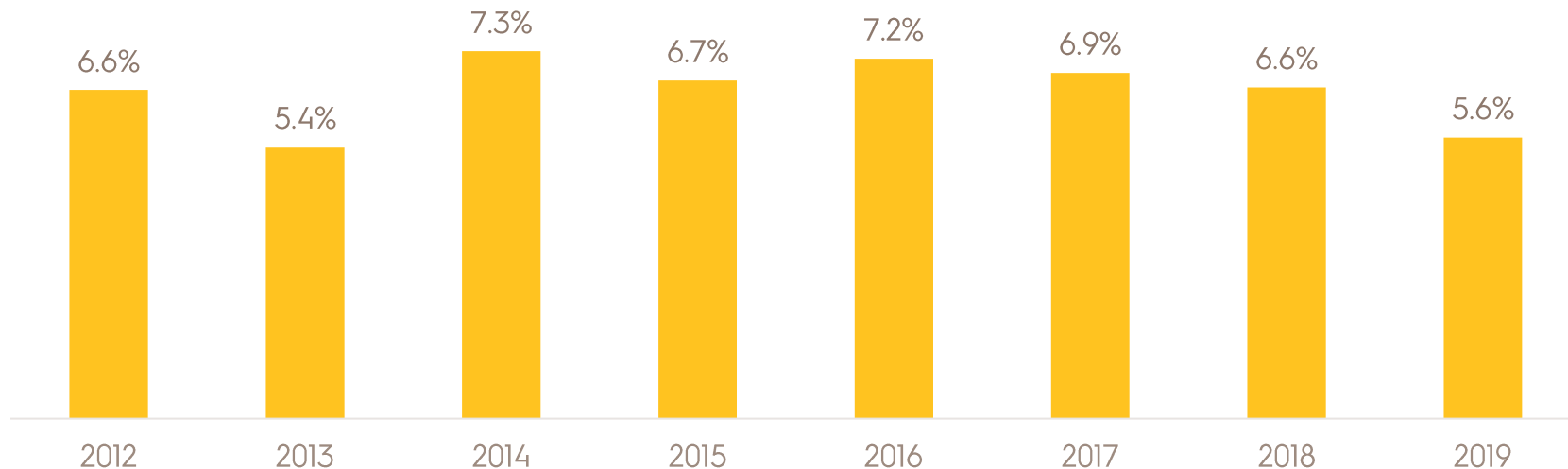
% Change YOY (Total Bakery)	-3%	35%	7%	-3%	12%	1%	-3%
% Change YOY (Bakery w/ Honey)	-19%	82%	-1%	4%	8%	-4%	-18%

Honey Share of Bakery Introductions



Honey share of new bakery introductions declined slightly from last year.

Honey Share of New Bakery Intros (2012-2019)



New Product Ingredient Comparison – By Category



Sugar tends to dominate this category; with honey falling behind brown sugar. Stevia, monk fruit, and agave continue to grow and gain awareness creating an important opportunity for honey to demonstrate its positive benefits over these new alternative sweeteners.

Bakery Category									
<i>Ingredient</i>	<i>2012</i>	<i>2013</i>	<i>2014</i>	<i>2015</i>	<i>2016</i>	<i>2017</i>	<i>2018</i>	<i>2019</i>	<i>% Change 2017-2018</i>
Granulated Sugar	1561	1654	2149	2446	2395	2638	2719	2611	-4%
Cane Sugar	185	129	299	321	339	468	539	512	-5%
Brown sugar	293	226	305	324	285	367	351	326	-7%
Honey	175	141	257	254	263	283	273	225	-18%
Stevia	17	23	44	32	26	48	55	69	25%
Monk fruit	4	4	7	17	3	22	31	43	39%
Maple Syrup	7	19	200	32	43	38	46	38	-17%
Coconut Sugar	4	7	11	34	27	42	45	28	-38%
Agave	25	15	38	29	17	35	17	20	18%

Bakery with Honey – New Product Examples



UHC	Lucky's Market
Company	Lucky's Market
Description	Hearty, crunchy multigrain bread made slightly sweet with a touch of honey and molasses. Bakes in 6-8 minutes.
Ingredients	Flour (wheat flour, malted barley flour, water, organic whole wheat flour, honey, molasses, less than 2% of: organic cornmeal, organic rolled oats, organic barley flakes, organic millet, wheat bran, sea salt, yeast, pumpkin seeds, flax seeds, sunflower seeds, sesame seeds, cultured wheat flour (wheat flour, citric acid), enzymes.



UHC	Flowers Foods
Company	Dave's Killer Bread
Description	Sliced organic sweet bread packed with oat and flaxseeds, with a touch of honey. Comes in a plastic packet.
Ingredients	Organic whole wheat flour, water, organic cane sugar, organic grain blend (organic barley flour, organic rye flour, organic spelt flour (wheat), organic millet flour, organic quinoa flour), organic cracked whole wheat, organic oat flakes, contains 2% or less of each of the following: organic honey , organic expeller pressed canola oil, organic wheat gluten, organic milled flax seeds, yeast, organic molasses, sea salt, organic cultured wheat flour, organic vinegar, enzymes, organic acerola powder.

Bakery with Honey – New Product Examples



UHC	Franz Family Bakery
Company	Franz Family Bakery
Description	Sliced, organic honey oat bread loaf in a 680g plastic packet with G-lock.
Ingredients	Organic enriched unbleached wheat flour (organic wheat flour, niacin, reduced iron, thiamine mononitrate, riboflavin and folic acid), filtered water, organic steel cut oats, organic sunflower seeds, organic honey , organic vital wheat gluten, organic cane sugar, organic brown sugar, contains 2% or less of each of the following: yeast, organic baby oat flakes, organic rolled oats, organic soybean oil, sea salt, organic distilled vinegar, ascorbic acid, organic cultured wheat flour, enzymes.



UHC	Aldi
Company	Trader Joes
Description	Sliced organic pumpkin bread with cinnamon bits, pumpkin seeds, sunflower seeds and sesame seeds, in a plastic packet with G-lock.
Ingredients	Organic whole wheat flour, water, organic cinnamon bits (organic sugar, organic wheat flour, organic cinnamon, organic sunflower oil), organic pumpkin puree, organic wheat flour, organic honey , organic sugar, organic wheat gluten, organic pumpkin seeds, organic sunflower seeds, yeast, contains 2% or less of organic flax seeds, organic sesame seeds, organic rolled oats, sea salt, organic high oleic safflower oil, organic cinnamon, organic allspice, organic cloves, organic nutmeg, calcium sulfate, sea salt, ascorbic acid (dough conditioner), enzymes.

Bakery with Honey – New Product Examples



UHC	Aldi
Company	Trader Joes
Description	Classic, all-butter shortbread biscuits accented with parmesan cheese, honey and rosemary. Comes in a plastic packet.
Claims Features	Certified kosher.
Ingredients	Unbleached enriched flour (wheat flour, niacin, iron, thiamine mononitrate, riboflavin, folic acid), butter (cream, salt), sugar, cheese (parmesan cheese [part-skimmed milk cheese cultures, vegetable enzyme, salt], cornstarch, powdered cellulose), honey , salt, rosemary.



UHC	Campbell
Company	Snyders Lance
Description	Delicious flavor packed into each tasty crispy crunch. Honey wheat braided twists combine whole wheat flour with real honey for a delicately sweet taste experience in an attractive, easy-to-eat shape. Comes in a plastic packet.
Claims Features	Made with real honey. America's pretzel bakery since 1909. Non GMO Project Verified. Peanut free. Certified kosher dairy.
Ingredients	Enriched wheat flour (wheat flour, niacin, iron, thiamine, riboflavin, folic acid), whole wheat flour, brown sugar, canola oil, honey , malt (tapioca syrup, malt extract), potato flour, yeast, soda.

Bakery with Honey – New Product Examples



UHC	Duverger
Company	Duverger
Description	Three packs of organic French macarons with salted caramel flavor, held in a carton box.
Claims Features	Certified USDA organic. Gluten free.
Ingredients	Cane sugar (organic ingredients), almond flour (organic ingredients), whipping cream (organic ingredients), cage free eggs (organic ingredients), white chocolate (organic ingredients)(cane sugar (organic ingredients), cocoa butter, whole milk powder (organic ingredients), soy lecithin, vanilla extract (organic ingredients)), butter (organic ingredients)(pasteurized cream (organic ingredients)), sea salt, honey (organic



UHC	Cappellos
Company	Cappellos
Description	Grain free naked pizza crust pizza in a 170g carton box. Made with almond flour.
Claims Features	Certificate from gluten, dairy, soy, yeast and grain. U.S inspected and pass by department of agriculture. Contains 4g protein. Paleo and vegetarian friendly. Certified kosher. Ingredients sourced non GMO.
Ingredients	Crust: cage free eggs produced from hens that are non caged and free to roam in open buildings, almond flour, arrowroot flour free to roam in open buildings, cassava flour, coconut milk, coconut oil, extra virgin olive oil, psyllium husk, lemon juice, sea salt, unfiltered apple cider vinegar, honey

Bakery with Honey – New Product Examples



UHC	Firehook Bakery
Company	Firehook Bakery
Description	Mediterranean baked crackers made with garlic and thyme, in a 156g plastic hinged tray. Staples of the Mediterranean Diet, garlic and thyme also go perfectly with your favorite pasta or salad.
Claims Features	Certified USDA Organic. Non GMO Project Verified. Handcrafted in the USA. Certified kosher pareve. No preservatives. No trans fats.
Ingredients	Organic wheat flour, organic honey, organic yeast, salt, organic garlic, organic thyme, organic olive oil.

NEW PRODUCTS REPORT | 2020



UHC	Julian Bakery
Company	Julian Bakery
Description	Gluten free cinnamon raisin cookies in a hinged plastic tray.
Claims	Certified gluten-free. Paleo-friendly. All-natural. Free of all major allergens except coconut. Grain-free. Soy-free. Non-GMO. Made with grass-fed collagen. No refined sugar. Recyclable packaging.
Ingredients	Proprietary flour blend (organic coconut flour, arrowroot powder, sweet potato flour), organic palm shortening, honey , maple syrup, organic unsweetened shredded coconut, organic raisins, water, apple cider vinegar, unsulfured molasses, baking soda, grass-fed collagen, cinnamon, kosher salt.

A top-down view of a wooden cutting board on a white surface. On the board are two slices of rustic, hole-filled bread, a butter knife with a pat of butter on its blade, and three small bowls of spreads: a white bowl with orange and red spread, a white bowl with white and red spread, and a yellow bowl with dark red jam. A glass jar with a wooden lid is partially visible in the bottom left.

SPREADS

Categories of Interest – Spreads

Total spreads as a category experienced growth from last year. Honey introductions saw slight declines.



Honey has a unique opportunity in this category as other sweeteners such as stevia and monk fruit still don't play a big role here, yet.

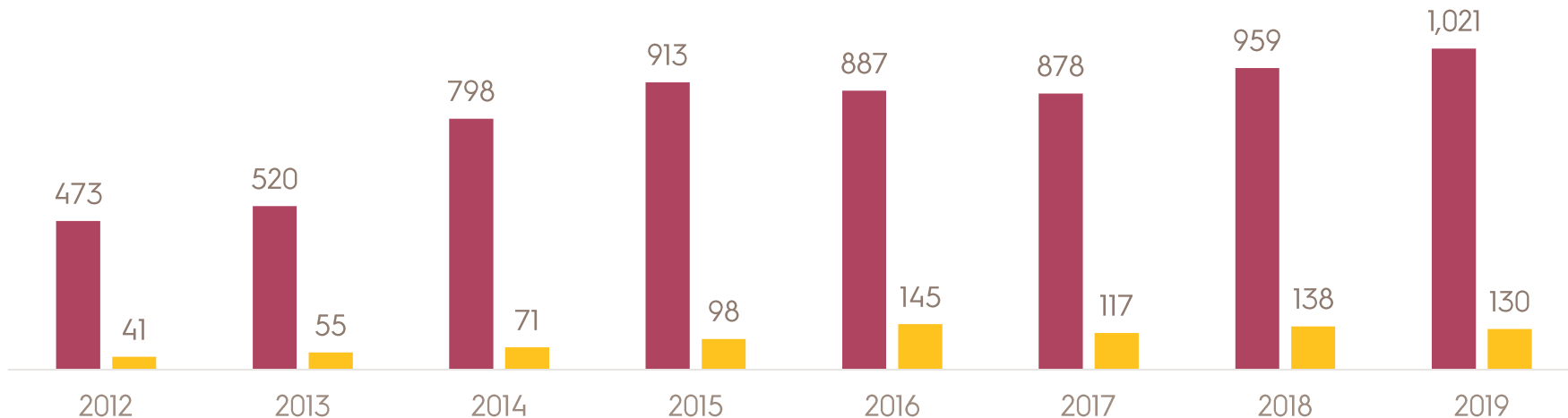


Total Spreads & Honey Introductions in the Category



Total spreads introductions experienced growth in 2019, while honey introduction decreased from 2018.

Total Spread and Honey Introductions in the Category
(2012-2019)



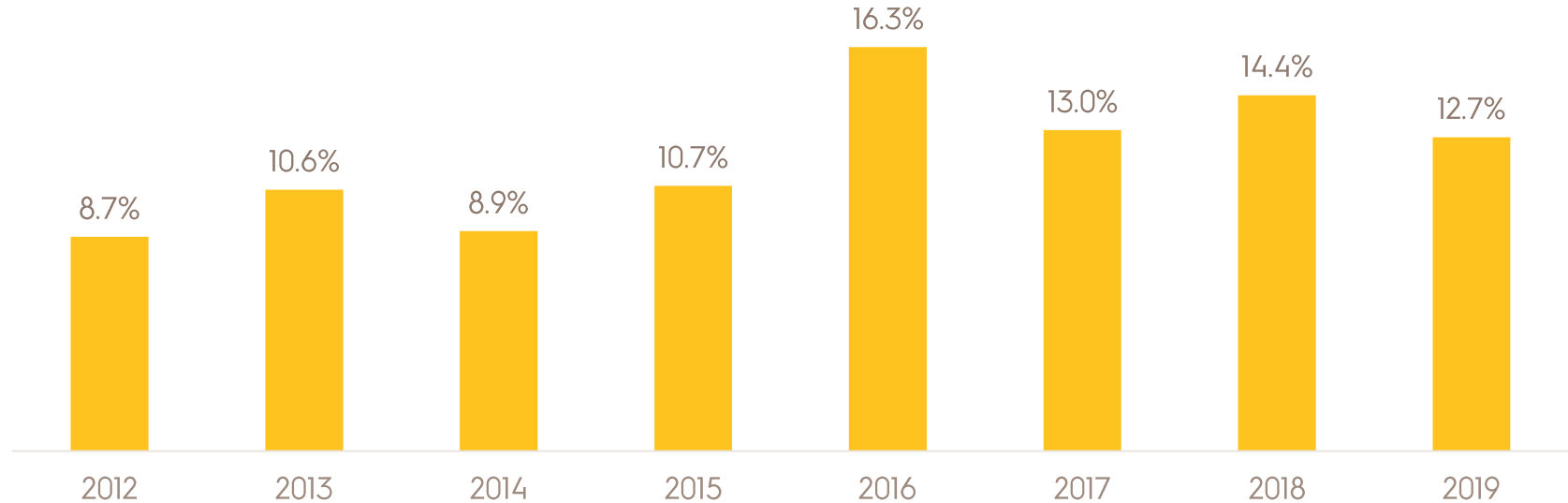
% Change YOY (Total Spreads)	10%	53%	14%	-3%	-1%	9%	6%
% Change YOY (Spreads w/ Honey)	34%	29%	38%	48%	-19%	18%	-6%

Honey Share of Spread Introductions



Honey owns roughly 13% share of new spread introductions in 2019 bringing honey levels closer to 2107.

Honey Share of New Spread Intros (2012-2019)



New Product Ingredient Comparison – By Category



While honey owns a good portion of new product introductions in spreads, sugar continues to be honey's biggest competitor. Newer sweeteners such as stevia, coconut sugar, and monk fruit have still not yet gained much traction in this category.

Spreads Category									
<i>Ingredient</i>	<i>2012</i>	<i>2013</i>	<i>2014</i>	<i>2015</i>	<i>2016</i>	<i>2017</i>	<i>2018</i>	<i>2019</i>	<i>% Change 2017-2018</i>
Granulated Sugar	162	226	298	272	257	305	266	298	12%
Honey	45	59	76	100	153	117	138	126	-9%
Cane Sugar	53	50	82	109	115	76	148	121	-18%
Maple Syrup	12	13	18	27	38	40	38	39	3%
Brown sugar	7	19	15	17	34	11	24	23	-4%
Stevia	2	1	10	9	11	6	10	17	70%
Coconut Sugar	1	7	8	29	14	17	10	14	40%
Monk fruit	0	0	0	0	4	0	5	5	0%
Agave	7	7	20	12	11	13	14	4	-71%
Peanut butter	2	9	11	15	10	9	12	1	-92%

Spreads with Honey – New Product Examples



UHC	Danone
Company	Danone
Description	Roasted peanut honey probiotic peanut blend in a 45g plastic doypouch.
Claims Features	Contains 2 billion probiotics. 11g protein.
Ingredients	Peanut, honey crystals (cane sugar, honey, cane molasses), dried nonfat yogurt (whey protein concentrate, skimmed milk, yogurt cultures [<i>L. bulgaricus</i> , <i>S. thermophilus</i>]), coconut oil, <i>Bacillus coagulans</i> gbi-30 6086, cinnamon, sea salt.



UHC	Pb Crave
Company	Pb Crave
Description	Honey and sea salt flavored peanut butter spread in a 454g plastic jar.
Claims Features	Made with liquid real honey. Certified kosher. Gluten free. 6g of protein per serving. Natural. Naturally flavored.
Ingredients	Roasted peanuts, honey , palm oil, sea salt.

Spreads with Honey – New Product Examples



UHC	Living Tree Community Foods
Company	Living Tree Community Foods
Description	Hazelnut chocolate almond butter in a 453.6g glass jar.
Claims Features	USDA organic. Alive and organic. We support family farmers.
Ingredients	Organic almond, organic hazelnuts, organic dark chocolate (cacao nibs, cacao butter, coconut sugar, vanilla), organic honey, royal Himalayan pink crystal salt.



UHC	Target
Company	Target
Description	Honey creamy almond butter comes in a 454g plastic jar.
Claims Features	6g protein per serving, 100% satisfaction guaranteed or your money back. Recyclable packaging.
Ingredients	Almonds, cane sugar, palm oil, powdered honey , sea salt.

Spreads with Honey – New Product Examples



UHC	Robert Rothschild Farm
Company	Robert Rothschild Farm
Description	A thick blend of whole grain mustard and honey folded with sesame seeds giving it a unique east meets west profile. Comes in a glass jar.
Claims Features	Gluten free. Certified kosher.
Ingredients	Sugar, honey , ground mustard, toasted sesame oil, raspberry vinegar (white vinegar, raspberry puree, lemon juice concentrate, pectin, citric acid, sodium citrate), mustard seeds, salt, sesame seeds, spices, natural garlic oil.



UHC	Zen Bear Honey Tea
Company	Zen Bear Honey Tea
Description	Our mix rests on a deep chocolate base with a mellow chili warmth alongside the intricate flavors of true cinnamon and allspice. Enjoy our combination of hot chocolate combined with cinnamon and a spark of cayenne in this rich, satisfying blend.
Ingredients	Pure natural clover honey , organic cacao, cinnamon, cayenne, lucuma and sea salt.

Spreads with Honey – New Product Examples



UHC	Target
Company	Target
Description	Organic raw and unfiltered whipped honey in a 340g plastic jar. Sweetens favorite recipes, meals and snacks.
Claims Features	US grade A. Non GMO. USDA organic. Certified kosher. Recyclable packaging. Ready to eat. Raw and unfiltered honey retains pollen and enzymes. Pure honey.
Ingredients	Organic honey



UHC	Aldi
Company	Trader Joe's
Description	Cinnamon bun spread in a 284g glass jar.
Claims Features	Certified kosher dairy.
Ingredients	Honey , tapioca syrup, milk, cream, brown sugar, butter (cream, sea salt), cornstarch, salt, natural flavor, ground cinnamon, vanilla extract (water, ethyl alcohol, vanilla bean extractives).

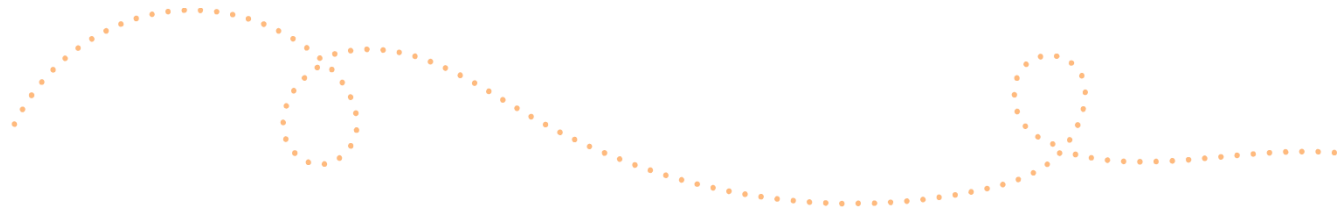
A person wearing blue gloves is preparing cold beverages. They are using a metal pitcher to pour liquid into clear plastic cups. Some cups already contain ice and a green liquid, while others are empty or partially filled. The background is slightly blurred, showing more cups and a stainless steel surface.

COLD BEVERAGES

Categories of Interest – Cold Beverages



Both total cold beverage introductions and honey introductions declined in 2019. Total beverage introductions saw slight declines after a year of significant growth in 2018.



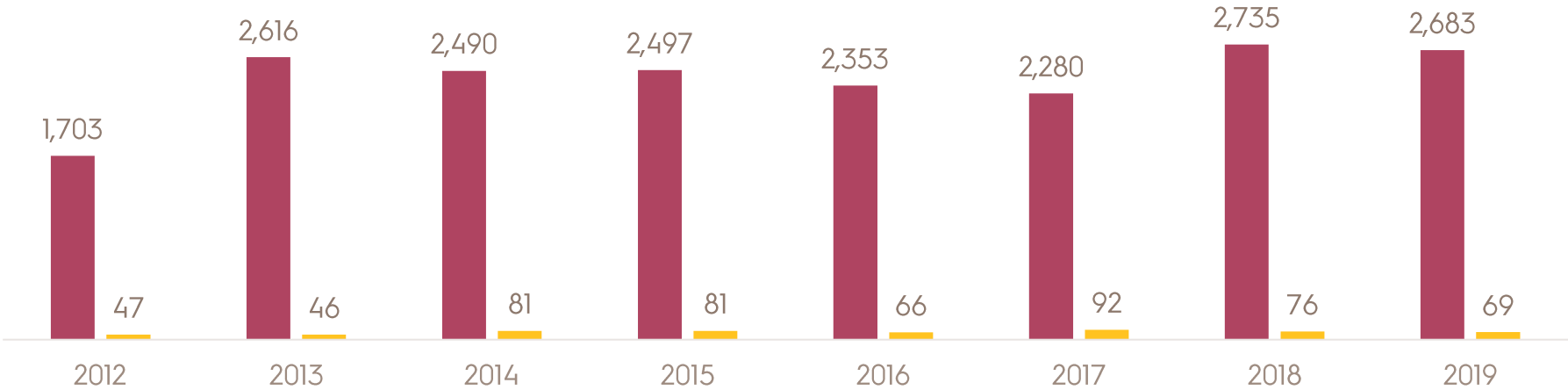
Monk fruit overtook honey in 2019 introductions, showing that monk fruit is no longer an emerging threat, but a key competitor for honey in cold beverages.

Total Cold Beverage & Honey Introductions in the Category



Both total cold beverage introductions and honey introductions decreased from year ago.

Total Cold Beverage Introductions and Honey Introductions in the Category
(2012-2019)



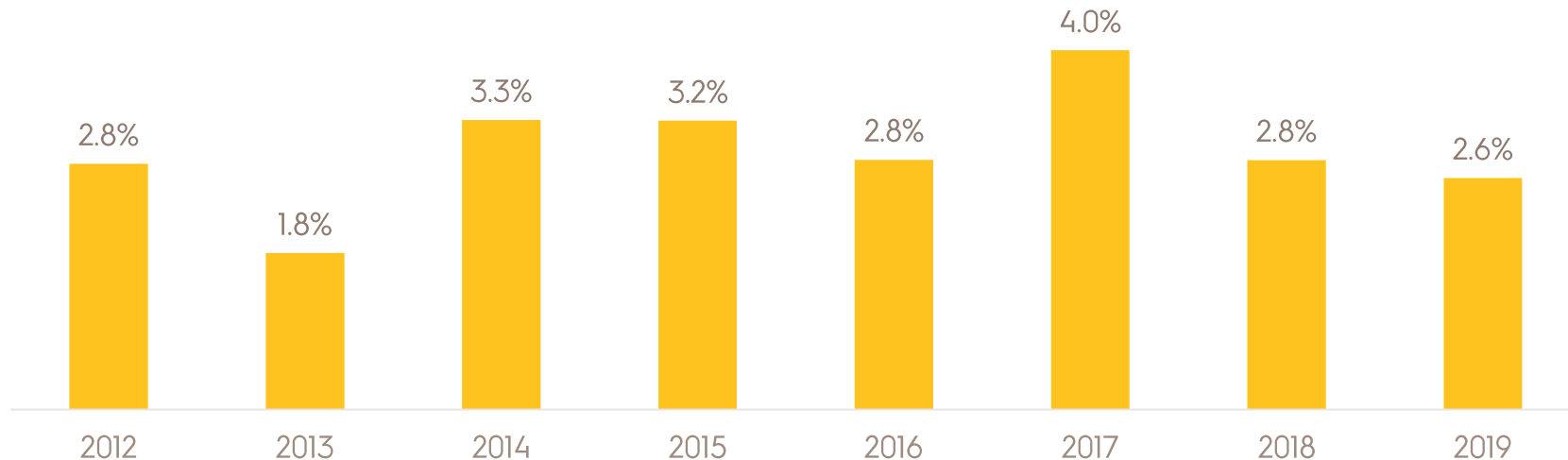
% Change YOY (Total Cold Drinks)	54%	-5%	0%	-6%	-3%	20%	-2%
% Change YOY (Cold Drinks w/ Honey)	-2%	76%	0%	-19%	39%	-17%	-9%

Honey Share of Cold Beverage Introductions

Honey still owns roughly 3% share of cold beverage introductions, a slight decrease from last year.



Honey Share of Cold Beverage Intros (2012-2019)



New Product Ingredient Comparison – By Category



Next to sugar, stevia continues to play a big role as a sweetener in cold beverages. Monk fruit saw significant growth in 2019 as it gains in popularity.

Cold Beverages Category									
<i>Ingredient</i>	<i>2012</i>	<i>2013</i>	<i>2014</i>	<i>2015</i>	<i>2016</i>	<i>2017</i>	<i>2018</i>	<i>2019</i>	<i>% Change 2018-2019</i>
Granulated Sugar	341	487	421	478	480	451	485	395	-19%
Cane Sugar	191	239	347	360	375	331	351	324	-8%
Stevia	163	197	273	229	341	229	231	284	23%
Monk fruit	5	30	39	54	42	31	52	92	77%
Honey	47	46	81	81	66	92	76	69	-9%
Agave	35	50	87	55	69	50	38	36	-5%
Maple Syrup	1	7	23	22	18	21	30	7	-77%
Coconut Sugar	3	2	15	6	7	8	11	6	-45%
Brown sugar	1	3	5	2	6	13	3	3	0%

Soft Drinks with Honey – New Product Examples



UHC	Co2 Brew
Company	Co2 Brew
Description	Natural honey carbonated real brewed yerba mate tea in a 355ml glass bottle
Claims Features	USDA organic. Real brewed tea. Native to South America, yerba mate is a super tea consumed for its wide range of health benefits and energizing properties. Loaded with antioxidants, vitamins and minerals, yerba mate is the 100% natural way to fuel your day. CO2 Brew's mission is to spread the spirit and culture of yerba mate by bringing people together and promoting active, healthy lifestyles. Certified organic by Oregon Tilth.
Ingredients	Brewed tea (filtered water, unsmoked organic fair trade yerba mate), organic honey , vitamin C (ascorbic acid).



UHC	Vultaggio And Sons
Company	Arizona Beverage
Description	Mucho mango liquid water enhancer with natural flavors, in a plastic bottle. Makes 32 servings.
Claims Features	Pear juice concentrate, mango juice concentrate, water, citric acid, honey , sucralose, natural flavors, acesulfame-K, vegetable juice for color, gum acacia, beta carotene for color, ester gum, potassium sorbate (preservative), sodium benzoate (preservative), calcium disodium EDTA.

Cold Drinks with Honey – New Product Examples



UHC	Suja Life
Company	Suja Life
Description	Organic energy tropical charge fruit juice drink with tea, in a plastic bottle.
Claims Features	USDA Organic. Non GMO Project Verified. Dairy-free. Soy-free. Gluten-free. 100mg of natural caffeine (similar to 1 cup of coffee). Contains 22% juice.
Ingredients	Purified water, organic pineapple juice, organic orange juice, organic mango puree, organic lemon juice, organic yerba mate extract, organic passionfruit juice, organic honey , organic turmeric powder, organic stevia leaf extract powder, organic green tea extract.



UHC	Teakoe
Company	Teakoe
Description	Signature cold brew fizzy black tea with raw honey and lemon, in an easy to open aluminum can.
Claims Features	Contains 30 calories, 7g sugar and 130mg caffeine. 100% organic black tea. Cold brewed. Made with real lemon juice. Naturally sweetened with raw honey. Non-GMO approved. Gluten free.
Ingredients	Filtered carbonated rocky mountain water brewed with organic black tea, Colorado wildflower raw honey , lemon juice, ascorbic acid (vitamin C), natural bergamot and lemon flavors, stevia leaf extract.

Soft Drinks with Honey – New Product Examples



UHC	Cha Cha Match
Company	Cha Cha Matcha
Description	Half matcha, half lemonade keeps you feeling young and refreshed. This is clean, efficient energy that'll make you Cha Cha. Comes in an easy-to-open aluminum can.
Claims Features	Jitter free. Smooth taste. Fatigue fighting. Smooth energy. This ceremonial grade matcha is made from the whole green tea leaf rather than brewed from it, so it has 100x more antioxidants, and caffeine levels similar to coffee. The feeling though, is entirely unique. Naturally occurring amino acids like L-theanine smooth out caffeine's highs and lows into calm, focused, sustained energy and mental clarity. Recyclable packaging. Plant energy. Matcha sourced from Uji, Japan. Non-GMO.1% for the planet.3% juice content.
Ingredients	Purified water, black tea concentrate, lemon juice, honey , ceremonial grade matcha, monkfruit, L-theanine, green tea



UHC	Obi Probiotic Soda
Company	Obi Probiotic Soda
Description	Organic tangerine and orange probiotic soda in a 355ml glass bottle. This citrus medley not only tastes delicious, it also contains vitamin C, antioxidants and bioflavonoids.
Claims	With active probiotics. USDA organic. Contains 20 verified kefir cultures. Non-GMO certified. No added sugar. Low calories. No artificial sweeteners. Gluten-free. Suitable for vegan. Dairy-free. Contains 25 calories.
Ingredients	Carbonated water, obi probiotic strains blend (bacillus coagulans, lactobacillus rhamnosus, lactobacillus paracasei), organic tangerine not from concentrate, orange blossom honey , natural flavors, citric acid, organic stevia extract Himalayan pink salt.



Cold Drinks with Honey – New Product Examples



UHC	Natur International
Company	Temple Turmeric
Description	Pure prana matcha shot in an 89ml plastic bottle.
Claims Features	Non GMO. 1000mg of shade crown matcha. USDA organic. Vitality superboost. Matcha: rich in antioxidants- ie EGC, boosts metabolism, detoxifies, enhances mood, supports immunity. Parsley: a potent detoxifier and diuretic, supports immunity. Apple cider vinegar: helps restore the body's PH balance (alkalinity), supports digestion, a powerful detoxifier, an energy booster, supports weight loss. Certified kosher.
Ingredients	Filtered water, organic ginger, organic honey , organic turmeric, organic lemon juice, organic apple cider vinegar, organic matcha powder, sea salt, organic parsley, organic black pepper



UHC	Blue Bus Cultured Foods
Company	Blue Bus Cultured Foods
Description	A naturally fermented health tonic kombucha made with organic ginger and hibiscus flowers. Comes in a 454g glass bottle. Botanical ginger and savory hibiscus radiantly shine through a ripe ruby hue. Dry, crisp and refreshing, the lightly tart finish leads to a pleasant ginger afterglow. So slow down. Stop and smell the flowers.
Ingredients	Water, kombucha culture, organic green tea, organic fresh pressed ginger, organic hibiscus flowers, organic cane sugar, local honey for carbonation.

A top-down view of a round wooden platter resting on a wooden surface. The platter holds ten small, white, circular bowls arranged in a circular pattern. Each bowl contains a different liquid or semi-liquid substance, likely various types of sauces or seasonings. The colors range from light yellow and cream to dark brown and green. A semi-transparent yellow rectangular box with a thin white border is centered over the platter, containing the text "SAUCES AND SEASONINGS" in white, bold, uppercase letters.

SAUCES AND SEASONINGS

Categories of Interest – Sauces and Seasonings

While total sauces and seasonings declined, honey introductions experienced growth in 2019. This is the third largest category for honey innovation, at just over 8%.



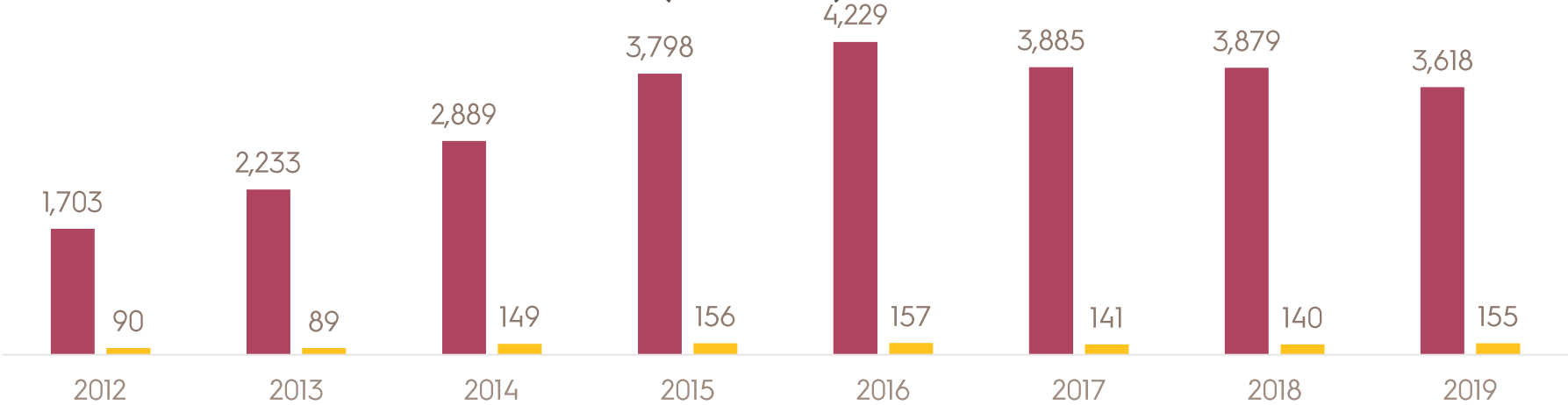
There is an opportunity for honey to source volume from sugar used primarily in new product introductions in sauces and seasonings.

Total Sauces & Seasonings and Honey Introductions in the Cat



Total category declined year over year while honey introductions increased significantly.

Total Sauces and Seasoning Introductions and Honey Introductions in the Category (2012-2019)



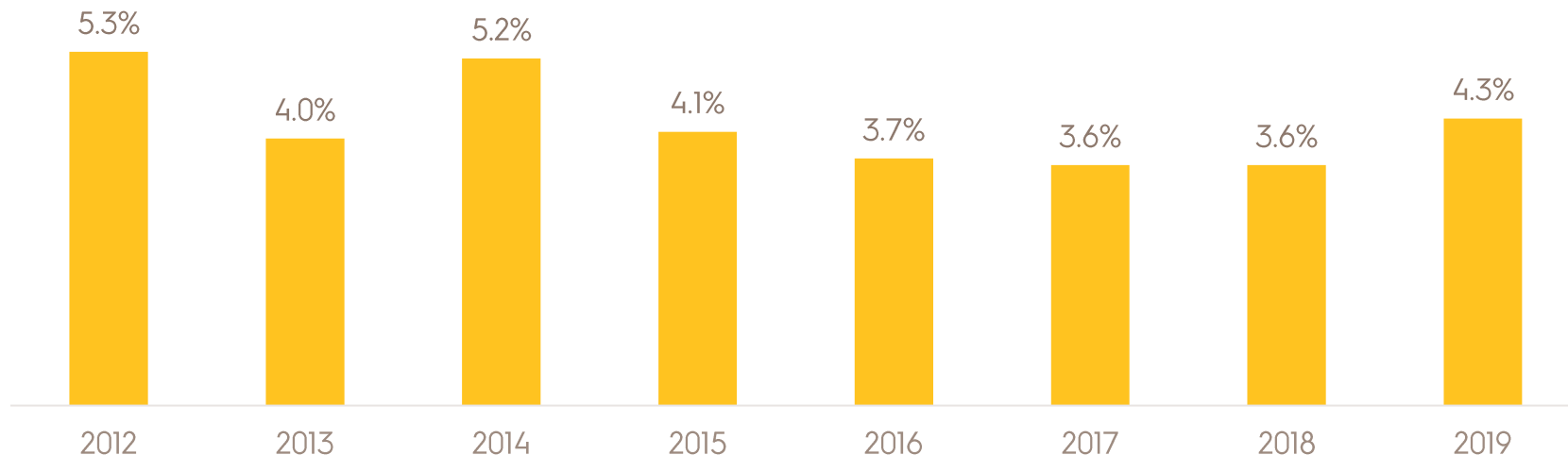
% Change YOY (Total Sauces & Seasonings)	31%	29%	31%	11%	-8%	0%	-7%
% Change YOY (Sauces & Seasonings w/ Honey)	-1%	67%	5%	1%	-10%	-1%	11%

Honey Share of Sauces & Seasonings Introductions



Honey share of sauces and seasonings is roughly 4% of all introductions and remains stable with previous years.

Honey Share of Sauces & Seasonings Intros (2012-2019)



New Product Ingredient Comparison – By Category



Other than sugar (granulated, cane, and brown), honey has the most new product introductions within sauces and seasonings. Agave, maple syrup, and stevia fall far behind however they saw inclines in growth compared to 2018.

Sauces and Seasonings Category									
<i>Ingredient</i>	<i>2012</i>	<i>2013</i>	<i>2014</i>	<i>2015</i>	<i>2016</i>	<i>2017</i>	<i>2018</i>	<i>219</i>	<i>% Change 2018-2019</i>
Granulated Sugar	502	755	919	1106	1213	1147	1145	1101	-4%
Cane Sugar	78	75	144	190	214	221	281	236	-16%
Brown sugar	71	108	157	208	229	211	154	187	21%
Honey	90	89	149	156	157	141	140	152	9%
Agave	33	12	14	21	16	15	13	23	77%
Stevia	3	2	9	7	10	13	7	22	214%
Coconut Sugar	0	1	1	9	15	5	6	22	267%
Maple Syrup	7	6	26	17	20	22	12	17	42%
Monk fruit	0	0	0	0	0	0	3	14	367%

Sauces & Seasonings with Honey – New Product Examples



UHC	Alex Lee
Company	Lowes Foods
Description	Smokehouse sweet mesquite molasses Kansas city BBQ sauce in a glass bottle.
Claims Features	Real smoke, real good. So porkin' good.
Ingredients	Pure cane sugar, tomato paste (contains salt and citric acid), apple cider vinegar, light brown sugar, molasses distilled white vinegar, apple juice concentrate, kosher salt, honey , mesquite smoke, rice starch, dehydrated garlic, dehydrated onions, black pepper, paprika, celery seed and cayenne pepper.



UHC	Honeyblaze
Company	Honeyblaze
Description	Hot buffalo sauce in a glass bottle.
Claims Features	National award winning sauce. With real honey and real butter. All natural. Sweet with a kick.
Ingredients	Aged cayenne peppers, vinegar, honey , butter, cayenne pepper, salt, molasses, water, sugar, onions, garlic cloves, tamarind extract, natural flavorings, chili pepper extract, natural vegetable gums.

Sauces & Seasonings with Honey – New Product Examples



UHC	Kroger
Company	Kroger
Description	Sesame teriyaki stir fry sauce in a 354ml glass bottle. Sweet and tangy with tamari plum and sesame.
Claims Features	Sesame teriyaki stir fry sauce will effortlessly elevate stir fry with a mildly sweet and tangy flavor and a hint of sesame. Create an easy Asian inspired meal with an authentic teriyaki flavor by using as a marinade for stir fried chicken or pork. Recyclable packaging.
Ingredients	Water, tamari soy sauce (water, soybeans, salt), sugar, honey , rice vinegar, cornstarch, plum puree, less than 2% of ginger, teriyaki flavor (soy sauce [water, soybeans, wheat, salt, sodium benzoate], natural flavors, molasses, corn syrup, caramel color, blackstrap molasses), xanthan gum, sea salt, ethyl alcohol, citric acid.

Sauces & Seasonings with Honey – New Product Examples



UHC	McIlhenny
Company	McIlhenny
Description	Spicy honey sauce in a PET bottle. Use it to punch up chicken wings, popcorn, roast beef, BBQ shrimp, deli sandwiches, breakfast wraps and more.
Claims Features	Recyclable packaging.
Ingredients	Honey , Tabasco brand pepper sauce (distilled vinegar, red pepper, salt).



UHC	New Seasons Market
Company	New Seasons Market
Description	Bright and tangy red wine vinegar and shallot dressing and marinade in a 250ml glass bottle. Creamy on the tongue with just the right tang. Complex flavors combine and create umami perfection. Velvety smooth with sublime shallot flavor and the perfect lip smack. Truly an amazing dressing.
Ingredients	Extra virgin olive oil, high oleic expeller pressed sunflower or safflower oil, red wine vinegar, water, fresh shallots, orange juice, pnw honey , organic Dijon mustard (organic apple cider vinegar, water, organic mustard seed, salt, organic spices), sea salt, fennel seed and white pepper.

Sauces & Seasonings with Honey – New Product Examples



UHC	Lavender Pond Farr
Company	Lavender Pond Farr
Description	Lavender and honey mustard rub spice in a glass bottle. Use as a rub or to create a marinade for chicken, pork or salmon. Sprinkle on deviled eggs or use in egg salad, potato or tuna salad. Excellent base for sauces and other condiments. Whether you're using it as a garnish or a main ingredient, lavender lends a subtle floral flavor to sweet or savory dishes.
Ingredients	Kosher salt, honey powder , crushed brown mustard, tumeric, granulated onion, granulated garlic, black pepper, cumin, coriander and US grown culinary lavender.



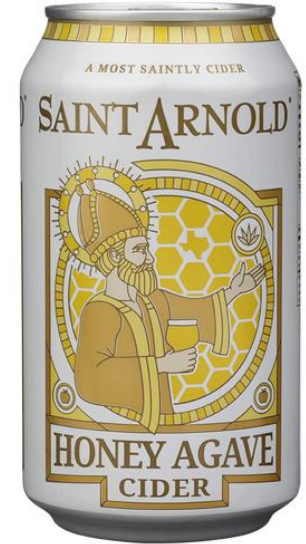
UHC	Good
Company	Good
Description	Plant based harvest apple vinaigrette made with apple and thyme, in a 258ml glass bottle. Apple, thyme, and shallots with a hint of honey . Made with a blend of fresh apples from Washington State for a crisp and refreshing flavor. Plus, it's perfect for marinating.
Ingredients	Non GMO expeller pressed canola oil, apple juice, apples, apple cider vinegar, water, honey , shallots, ground mustard, sea salt, garlic, thyme, black pepper.

A photograph of a bottle of Jack Daniel's Tennessee Honey liqueur and a glass of the drink. The bottle is on the left, with a white label that reads "JACK DANIEL'S", "ORIGINAL RECIPE", "Tennessee HONEY", "SINGLE CRAFTED HONEY LIQUEUR", "BLENDED WITH JACK DANIEL'S TENNESSEE WHISKY", and "SHALLON, TENN.". The glass is on the right, filled with the amber-colored liqueur and garnished with a fresh mint sprig. A yellow banner with the text "ALCOHOLIC BEVERAGES" is overlaid across the middle of the image. The background is a rustic wooden wall.

ALCOHOLIC BEVERAGES

Categories of Interest – Alcoholic Beverages

The alcoholic beverage category experienced it's fourth consecutive year of growth in new product introductions. Honey share has increased and represents roughly 8% of new products in this category



There continues to be opportunities to grow honey inclusions in new alcoholic beverages.

Total Alcoholic Beverages & Honey Introductions (PACKAGING)

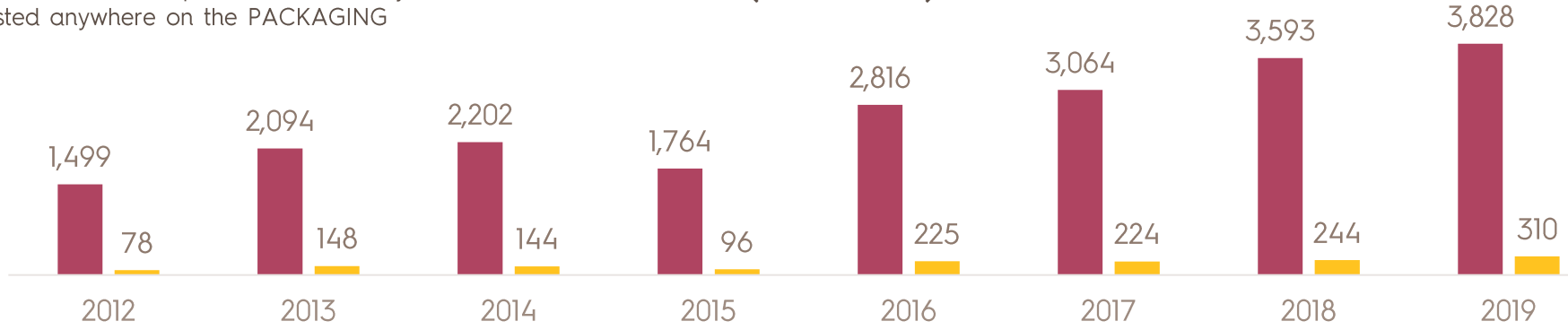


There continues to be significantly more products being introduced with “honey” listed somewhere on pack, vs. as an ingredient*.



Total Alcoholic Beverage Introductions and Honey Introductions in the Category (2012-2019)

Data includes all products with honey listed anywhere on the PACKAGING



% Change YOY (Total Alcoholic Beverages)	40%	5%	-20%	60%	9%	17%	7%
% Change YOY (Alcoholic Beverages w/ Honey)	90%	-3%	-33%	134%	0%	9%	27%

** In 2018, 3 total new alcoholic beverages had 'honey' listed as an ingredient, ingredient labeling is not a requirement for alcoholic beverages.*

Honey Share of Alcoholic Beverage Introductions (PACKAGING)

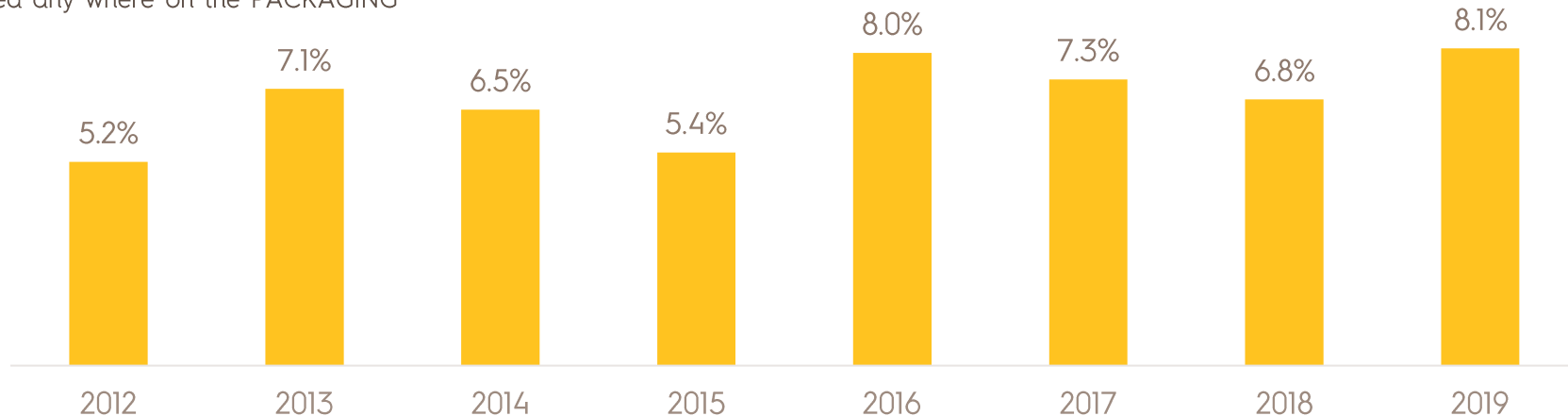


Honey owns an 8% share of alcoholic beverage introductions when considering those that have “honey” listed somewhere on the packaging, an increase from 2018.



Honey Share of Alcoholic Beverage Intros (2012-2019)

Data includes all products with honey listed anywhere on the PACKAGING



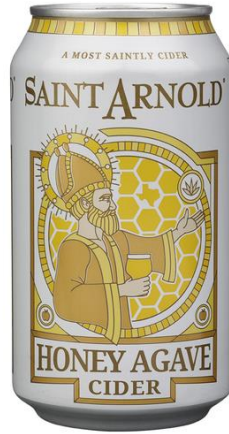
New Product Ingredient Comparison – By Category



Of those who listed ingredients in alcoholic beverages, sugar continues to play the biggest role, followed by stevia and honey which experienced growth from 2018.

Alcoholic Beverages Category									
<i>Ingredient</i>	<i>2012</i>	<i>2013</i>	<i>2014</i>	<i>2015</i>	<i>2016</i>	<i>2017</i>	<i>2018</i>	<i>2019</i>	<i>% Change 2018-2019</i>
Cane Sugar	11	6	1	4	14	14	17	45	165%
Granulated Sugar	10	15	12	11	23	10	20	19	-5%
Stevia	0	0	0	0	2	0	2	16	700%
Honey	10	6	9	1	14	8	3	13	333%
Maple Syrup	2	1	2	2	2	1	1	8	700%
Monk fruit	0	1	0	0	0	0	0	7	-
Brown sugar	1			1	1		9	4	-56%
Agave	0	3	4	1	0	1	2	3	50%
Coconut Sugar	1	0	0	0	0	1	0	1	-

Alcoholic Beverage Product Example (Honey listed as an ingredient)



UHC	Saint Arnold Brewing Company
Company	Saint Arnold Brewing Company
Description	This cider has a bright apple flavor and aroma, along with big floral, melon, and citrus notes. The honey and agave combine to create a nice sweetness, complementing the tart apple flavor and delivering a balanced finish. Comes in a 355ml aluminum can.
Claims Features	Contains 5.9% alcohol by volume. Their honey along with agave sweetens new honey agave cider.
Ingredients	Hard apple cider, water, agave, honey , malic acid, sulfites (to preserve freshness).



UHC	Reeds
Company	Reeds
Description	Non alcoholic original craft ginger beer in a 355ml aluminum can.
Ingredients	Sparkling filtered water, cane sugar, pineapple juice from concentrate, honey , ginger root, lemon and lime juices from concentrate, spices.

Alcoholic Beverages with Honey – New Product Examples



UHC	Alaskan Brewing Company
Company	Alaskan Brewing Company
Description	Alaskan Blonde Ale is a classic American blonde: easy-drinking and approachable, with low-to-moderate hops and malt and a delicately sweet, biscuity character. Comes in a 355ml aluminum can.
Claims Features	Contains 5% alcohol by volume. Ibu: 18. Alaskan Blonde is brewed with wildflower honey, adding a unique ingredient to a classic beer style. The aroma and flavor have a light malt character with a touch of sweetness. Hop bitterness is low, offering earthy, spicy, floral notes. This light-bodied beer has high carbonation and finishes dry with lingering notes of honey .
Ingredients	Alaskan blonde ale is made from glacier-fed water and features nugget hops, pale malt and wildflower honey .



UHC	Juneshine
Company	Juneshine
Description	Blood orange and mint hard kombucha with 6% alcohol by volume, in a 473ml aluminum can. Crafted to quench the thirst of the active, healthy and adventurous spirit.
Claims Featured	Contains 6% alcohol by volume. Each unique flavor is brewed to include antioxidants, vitamins and probiotics so that you don't have to choose between tonight and tomorrow. Organic. Probiotic and gluten free. Recyclable packaging.
Ingredients	Blood orange, mint, green tea, honey , jun kombucha.

Alcoholic Beverages with Honey – New Product Examples



UHC	Jester And Judge
Company	Jester And Judge
Description	A mixture of American Apple cider with Gunpowder green tea, and Earl Grey tea providing an approachable tannic backbone blended with soft, tea inspired, floral and melon notes. Comes in a 500ml glass bottle.
Ingredients	Hard apple cider, fresh pressed apple juice, honey , gunpowder green tea, earl grey tea.



UHC	Juneshine
Company	Juneshine
Description	Hard kombucha midnight painkiller flavored cocktail with 6% alcohol content, in a 473ml aluminum can. June Shine dark twist on the classic painkiller tiki cocktail with charcoal, pineapple, coconut, orange and nutmeg.
Ingredients	Coconut, pineapple, orange, nutmeg activated charcoal green tea, honey jun kombucha.



Thank You