

20 TREND INSIGHT 14 REPORT

DESSERT TOUR PART ONE: SEASONALITY



Kit Barmann
Marketing Communication Lead

Around the holidays, consumer and trend expert Pamela Oscarson and I selected a variety of restaurants and shops in Chicago to explore and scout their sweet flavor combinations, menu items and unique creations. We wanted a first-hand look at dessert trends and flavors, and we were not disappointed.

Introduction to our Dessert Trends Series

During our tour, we noticed five clear trends:

1. Seasonality
2. Comfort/Nostalgia
3. Local/Sustainability
4. Twist on the Classics
5. Simplicity

Beginning with this report on Seasonality, we will deliver a series covering each trend over the next several weeks. Reports will look at the trend in general, and then discuss how we saw it in action from French pastry shops to ice cream shops and trendy restaurants. Ready? Let's go!



SEASONALITY

Each season has flavors associated with it, but fall and winter have several great ones, not the least of which is pumpkin. Pumpkin flavor is a terrific example of seasonal flavors in the marketplace. Consumer anticipation for Starbucks Pumpkin Spice Latte reaches towering heights leading to its annual launch when the weather turns cool. The flavor is comforting, sentimental and nostalgic, delivering coffee drinkers a taste that evokes feelings of comfort and memories of things like bonfires, pumpkin carving, special meals with families. It is something they look forward to each year. It is a seasonal treat.

Seasonal flavors incorporated into menu items and product launches throughout the year give consumers a new reason to engage with the brand and build excitement. Highlighting seasonal flavors has increased, perhaps tying to the local and sustainable movements, with consumers more interested in the ingredients available at that time. Regardless of the motivation, consumers are surely having a good time with them, as chocolate and beer were the top two sub-categories with seasonal flavors!

NEW PRODUCT INTRODUCTIONS

Over the past five years, seasonal food and drink launches have increased 94% in North America. In 2009, 812 products carried the claim, but in 2013 there were more than 1,500.

Top Sub-Categories with Seasonal Claims (2009-2013, North America)

1. Seasonal Chocolate
2. Beer
3. Cookies
4. Pastilles, Gums, Jellies & Chews
5. Baking Ingredients & Mixes



Spatzl Brewery Shiner Holiday Cheer Beer is a dark wheat ale brewed with Texas peaches and roasted pecans, and also features malty flavors enhanced with the use of malted barley and wheat.

Seasonal Chocolate was tops, accounting for 34% of the launches. Product flavors included winter favorites such as Dark Chocolate Peppermint, Chai White Chocolate, Eggnog, Hot Toddy and Hot Buttered Rum.

Beer was the second most popular seasonal introduction, and it is the sub-category boasting the greatest increase of launches since 2009. There were only 15 seasonal beers on the market then, but in 2013, consumers could select from 222



Shipyard Pugsley's Signature Series Smashed Pumpkin Ale has an aroma of pumpkin and nutmeg, contains pale ale, wheat and light Munich malts that combine with the natural tannin in pumpkin and the delicate spiciness of Willamette and Hallertau hops to balance the sweetness of the fruit.

varieties. The largest spike came in winter 2012/2013 when launches soared to 136 from 38 the previous two quarters and from 57 the previous winter.

Baking Ingredients & Mixes rounds out the top five, with an array of flavors commonly seen on dessert trays and in gift baskets: Gingerbread, Chocolate Peppermint, Snickerdoodle, Red Velvet, Pumpkin Spice, Pink Lemonade and Lemon Lavender.



Lazy Mutt Seasonal Shandy Flavored Beer is a wheat ale with natural citrus notes and some fresh lemons.



Fall is more than pumpkins!

Pillsbury launched "back to school" sugar cookies in Canada in the Fall of 2012. The cookies were original sugar cookie flavor and featured a smiling school bus design.

ON THE MENU

Of course, we see a wide assortment of the usual pumpkin-flavored sweet treats: pie, bread, muffins, scones, pound cake, tarts, custard and Culver's Salted Caramel Pumpkin Concrete Mixer. But, pumpkin appeared in savory dishes, as well. Interesting menu listings include:

- Pumpkin ravioli with sage sauce
- Pumpkin mashed potatoes
- Butternut Squash, Golden Delicious Apple Purees, and Pumpkin simmered in a Vegetarian Veloute, with Sweet Cream, Maple Syrup, and Rosemary
- Caribbean soup with plantains, yucca, corn, pumpkin, and chicken
- Pak Tay Po with tofu, squash, eggplant, jalapeno, pumpkin and a red curry tamarind sauce

PUMPKIN ON THE UPSCALE DESSERT MENU

Pears and Maple: Maple Panna Cotta, Vanilla Compressed Pears, Pumpkin Granola, Cranberry Air, Pepita Lace, Pear Sorbet

OUT ON THE TOWN: HIGHLIGHTS FROM OUR SWEET ADVENTURE

Visiting a variety of sweets shops in the city gave us the opportunity to see an array of seasonal flavors in sweet, savory and unexpected applications.

Mindy's Hot Chocolate Restaurant and Dessert Bar features high-quality, seasonal and locally-sourced food, drink and pastry.

Spotted: Seasonal Flavor Inspiration

- Pumpkin Hot Chocolate
- Maple Pie
- Red Wine Pear Sorbet
- Stout & Caramel Milkshake
- Brioche Doughnuts with Hot Fudge & Caramel Corn
- Taffy Apple: Granny Smith apple frozen nougat, cider caramelized apples, cornnut poppycock, cider consommé
- Chocolate & Pears: Tcho chocolate frozen nougat, chocolate buttermilk cake, port wine poached pears, pear sorbet, oatmeal & honey streusel
- Apple Brioche Bread Pudding: apple butter, caramel apple cream, Ida red apple fritters

Vanille is an authentic French patisserie that creates pastries of "exceptional quality and artistry in its masterful blend of classic European traditions with modern flavor profiles and contemporary palettes."

Spotted: Seasonal Flavor Inspiration

- Elodie: Sour cream mousse, cinnamon apple
- compote, cider gelee, brown sugar cake
- Royal: Crisp caramel streusel base, hazelnut
- decquoise, chocolate mousse, dark chocolate glaze
- Pierre: Hazelnut Financier, Spice Cremeux,
- Pear Mousse, Pear Vanilla Glaze
- Apple Tarte with Coconut Streusel
- Pear Almond Tarte
- Cranberry Orange Mascarpone Tarte

Floriol Cafe and Bakery specializes in French pastries using fresh, local ingredients.

Spotted: Seasonal Flavor Inspiration

- Butternut Squash Clafoutis
- White chocolate Pumpkin Cremeaux
- Chocolate Hazelnut Cookie
- Milk Chocolate Salted Caramel Hazelnut Tart
- Canelé de Bordeaux/Vanilla Rum Custard Cake



OUT ON THE TOWN: HIGHLIGHTS FROM OUR SWEET ADVENTURE [continued]



I SPY: PASSIONFRUIT

Almost everywhere we went, we saw passionfruit-flavored desserts!

Katherine Anne Confections —
Passionfruit Ginger Truffle

Floriolo —
Passionfruit Tart

Vanille —
Tarte Maeva featuring Bruleed Passionfruit Curd

Jeni's Splendid Ice Creams —
Passionfruit Frozen Yogurt

On store shelves in North America since 2009, Passionfruit flavor has been seen most often in jellybeans. Next most common were chocolates and frozen fruit bars. In chocolates, we see flavors like Chocolate Almond Passionfruit, Chocolate Mango, and White Chocolate Passionfruit. In frozen fruit bars, Passionfruit is paired with flavors such as Mango, Pomegranate, Pineapple and Coconut.

Katherine Anne Confections creates sweets with a focus on local ingredients.

Spotted: Seasonal Flavor Inspiration

- Pecan Pie
- Hazelnut
- Cranberry Blood Orange
- Brown Buttered Rum
- Chai Tea
- Pumpkin Pie
- Grapefruit Pistachio
- Bourbon & Ginger Caramel
- Brown Butter & Sage Marshmallows
- Salted Caramel Marshmallows
- Cinnamon Marshmallows
- Vanilla Black Pepper Marshmallows

Jeni's Splendid Ice Creams "builds every recipe from the ground up with Snowville milk and cream from cows that eat grass."

Spotted: Seasonal Flavor Inspiration

- Sweet Potato with Torched Marshmallow
- Whiskey & Pecans
- Dark Chocolate Peppermint
- Pistachio & Honey
- Riesling Poached Pear
- Brown Butter Almond
- Dark Chocolate Peppermint
- Hot Toddy
- Whiskey Eggnog



CONSUMER SURVEY: SEASONAL FLAVORS

We conducted an online survey of 380 consumers in January of this year to gain insight into their preferences of certain seasonal flavors. The majority of the respondents were between the ages of 25-64. We provided lists of flavors sorted by season and asked respondents to rank them for preference during each season. Below are consumers' five most popular flavors for each time of year:

Spring Flavors

1. Carrot Cake
2. Berry Angel Food Cake
3. Crème de Menthe
4. Lemon Lavender
5. Grapefruit

Fall Flavors

1. Caramel Apple
2. Apple Cider
3. Pumpkin Pie
4. Pecan Pie
5. Hazelnut

Summer Flavors

1. Pink Lemonade
2. Pound Cake
3. Root Beer Float
4. Vanilla Almond
5. S'mores

Winter Flavors

1. Snickerdoodle
2. Dark Chocolate Peppermint
3. Red Velvet
4. Gingerbread
5. Chai White Chocolate

*Seasonal flavors are a hit with consumers all year long!
Stay tuned for the next report in our series, Comfort & Nostalgia.*



FONA CAN HELP!

Let FONA's market insight and research experts translate these trends into product category ideas for your brand. They can help you with concept and flavor pipeline development, ideation, consumer studies and white space analysis to pinpoint opportunities in the market.

Our flavor and product development experts are also at your service to help meet the labeling and flavor profile needs for your products to capitalize on this consumer trend. We understand how to mesh the complexities of flavor with your brand development, technical requirements and regulatory needs to deliver a complete taste solution. From concept to manufacturing, we're here every step of the way.

CONTACT OUR SALES SERVICE DEPARTMENT

at 630.578.8600 to request a flavor sample or visit www.fona.com.