

20 FLAVOR INSIGHT 15 REPORT

WHERE THERE'S SMOKE, THERE'S FIRE



Craving Fire

Hungry for layers of flavor and experimental dining, consumers are seeking the flavors of fire – charred, flamed, wood-grilled, fire-roasted and smoked, which have adapted from ways of preparation into flavors themselves. These cookery techniques give diners the experience they are looking for, offering sensory cues including a smoky aroma, charred texture, grill-marked presentation and of course, woody flavor and taste.

Recognizing the unique craftsmanship behind the preparation and adopting it into a flavor has allowed smoke, in particular to move past traditional savory dishes into other categories like beverages, desserts and snacks.

Smoke:

Smoking is the process of flavoring, cooking or preserving food by exposing it to smoke from burning or smoldering material, most often wood. Meats and fish are the most common smoked foods, although cheese, vegetables and ingredients used to make beverages such as smoked beer and lapsang souchong tea are also smoked.

FLAVOR SNAPSHOT: SMOKE

1,172

GLOBAL NEW PRODUCT
INTRODUCTIONS FROM
JANUARY 2011 - APRIL
2015.

**Top 3
Categories:**

DAIRY, SNACKS, SAUCES &
SEASONINGS.

**Top
Restaurant
Segment:**

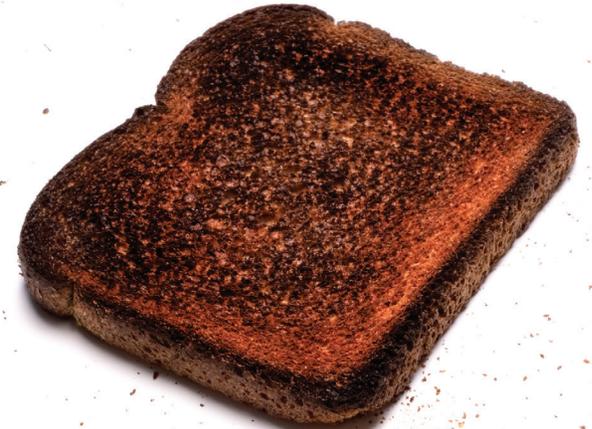
CASUAL DINING

**Top Global Flavor
Pairings:**

SMOKE BACON, SMOKE MAPLE, SMOKE
CHIPOTLE, SMOKE BBQ AND SMOKE
SEA SALT.

Top 4 Claims:

NO ADDITIVES/PRESERVATIVES,
GLUTEN-FREE, LOW/NO/REDUCED
ALLERGEN, VEGETARIAN.



SMOKY HOT SPOTS

We're spotting smoke flavor everywhere!

Smoke's classic yet trendy flavor speaks to both tradition and comfort along with experimentation and uniqueness. Check out how these print publications used and featured smoke in their recipes:

- **Saveur** features an article titled "Burnt Citrus Salt," boasting the unique flavor of charred citrus fruits. The recipe calls for a mixture of lemon, lime, orange, maldon salt and recommends this smoky topping for meat, fish and even potato chips!
- **Food Network** features in the "Weekend Cooking" section, a recipe for Smoky Bloody Marys which includes peppered bacon, tomato juice, bacon-flavored vodka, horseradish, Worcestershire sauce and chipotle hot sauce, topped with ground pepper and celery salt.
- **Food Network** features several sauce pairings for spiced fries. A interesting recipe for Smoky Barbecue Sauce includes adobo sauce (from a can of chipotles), barbecue sauce and maple syrup.
- **Prevention** suggests substituting smoked black cod for your next lunch to take advantage of its omega-3 benefits. This recipe includes sprouted rye bread, cabbage and miso, and is inspired by chefs Nick Balla and Courtney Burns of Bar Tartine in San Francisco.



Spotted on Pinterest:

On *Pinterest*, smoke flavors are moving past traditional meat and savory dishes and being utilized in new and interesting ways. Below are a few recipes spotted using smoke:

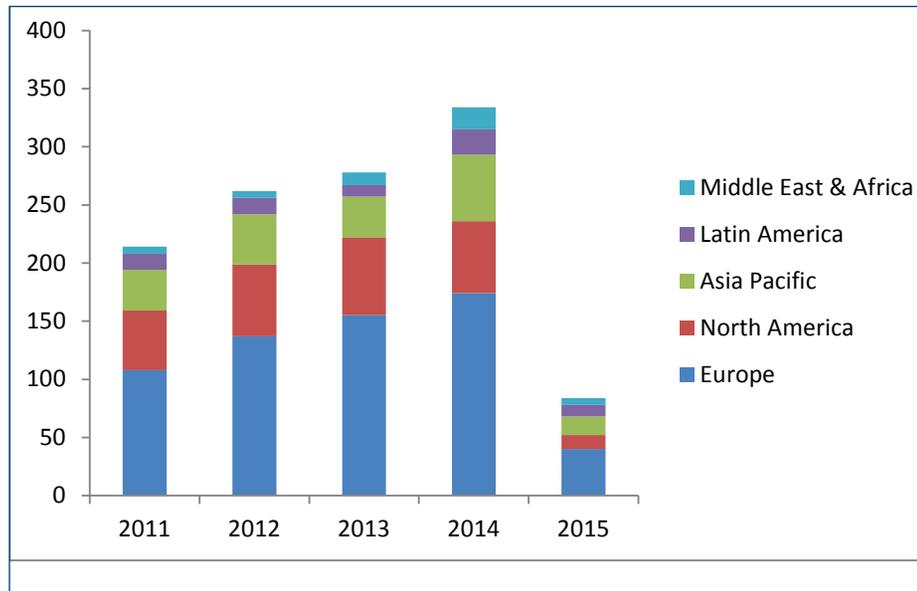
- Smoked Cardamom Ice Cream
- Smoked Sugar & Sour Cherry Old Fashioned Cocktail
- Chocolate Covered Pretzels with Maple Smoked Bacon Crumbles
- Smoked Paprika Rub
- Smoked Caramel, Vanilla & Pear Cakes
- Smoked Lemonade
- Smoked Sea Salt & Dark Chocolate Chip Cookies



SMOKE FLAVOR: A GLOBAL VIEW

Global New Product Introductions

Jan. 2011 - April 2015



Globally, smoke flavored new product launches have seen an overall increase of 56% since January 2011. All regions are showing growth within this time period but Europe (specifically the UK) is taking the lead with a total of 614 introductions.

In terms of sub-category, hard cheese & semi-hard cheese, meat snacks, table sauces, meat pastes and potato snacks are the top five categories in the global market for smoke flavor.

1,172
New Product
Introductions

Products of Note:



Pirana Smoked Sea Salt
Flavored Toasted Peanuts:
Argentina



Sacla Italia Kale & Smoked
Ricotta Pesto: UK



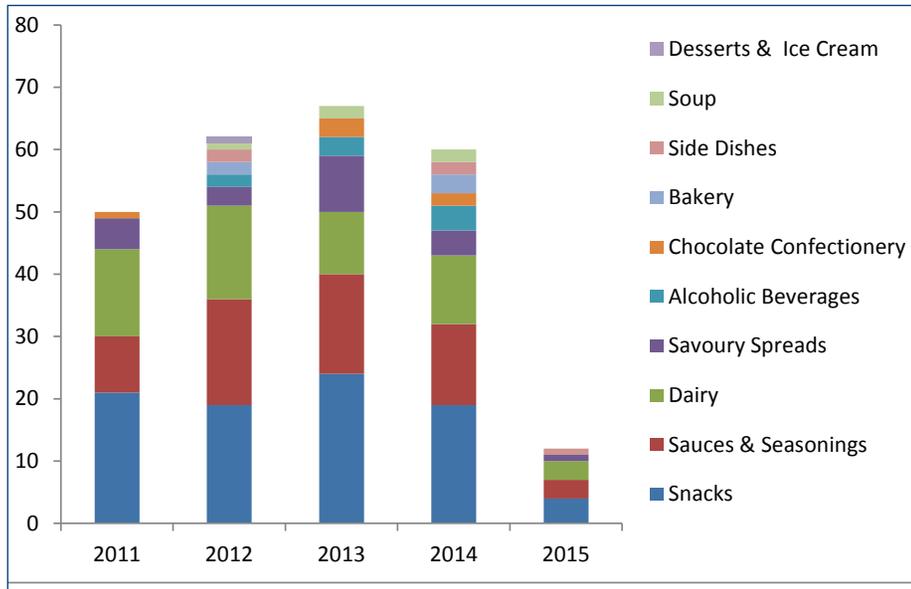
Strumpf Smoked Ketchup:
Brazil



Chado Nilgiri Green Smokey
Tea: India

SMOKE FLAVOR: NORTH AMERICA

North America New Product Introductions Jan. 2011 - April 2015



In North America, smoke flavored new product launches have seen an overall increase of 22% from 2011 to 2014. In 2015, we can expect to see this growth continue, especially within the snacks, sauces & seasonings and dairy sectors.

Smoke has shown to be a versatile flavor with its appearance across the market in several different categories. Snacks, sauces and seasonings, dairy, savory spreads, and alcoholic beverages are the top five growing sub-categories.

253
New Product
Introductions

Products of Note:



The Stone Brewing Smoked Porter with Chocolate & Orange Peel Beer



Smoked Lime & Tequila BBQ Sauce



Strong & Kind Honey Smoked BBQ Almond Protein Bar



Empire Mayonnaise Co.
Smoked Paprika Mayonnaise

SMOKE ON THE MENU

The technique of smoking, grilling, charring, wood-firing and the alike all lend themselves to the smoky, cooked flavor that is highlighted on many menus. Specific smoking techniques and flavors are often called out such as Applewood-Smoked, Hickory, Pit-Smoked, Cherry Wood-Smoked and Mesquite.

- Jimmy V's Steakhouse & Tavern, North Carolina
Wedge Salad featuring bleu cheese crumbles, grape tomatoes and **pecan-smoked bacon**.
- Smokey Bones Bar & Fire Pit, East Coast
Smoked Maple Blueberry Manhattan featuring Knob creek **Smoked Maple Bourbon**, blueberry puree and fresh oranges.
- Beacon Restaurant & Bar, New York
Caramel Bourbon featuring Maker's Mark Kentucky Straight Bourbon Whisky, caramel and **smoked vanilla ice cream**.
- Jean Georges, New York
Roasted Apricot featuring chartreuse sabayon, apricot sorbet and **smoked paprika**.
- Front Page News, Atlanta
Smoke Stack sandwich featuring pickled jalapenos, fried tabacco onions, tomato and **smoky BBQ mayo**.

THE SWEET SIDE OF SMOKE

Smoke is well versed in the savory category but its migration to the sweet side has resulted in desserts and confectionary treats boasting hints of smoke flavor. During a recent trend excursion to the Chicago French Market, FONA's Trend Team spotted smoke being used in several different chocolate bars. Take a look!



Vosges Smoke & Stout Caramel Bar



Vosges Smoked Cinnamon Sugar Toffee Bar



LP Smokin' S'mores Chocolate Bar



Mast Brothers Chocolate Vanilla & Smoke Chocolate Bar

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.

SOURCES:

- Mintel GNPD
- Mintel Menu Insights
- Pinterest
- Flavor & The Menu
- Food Network
- Saveur
- Prevention
- Chicago French Market

