

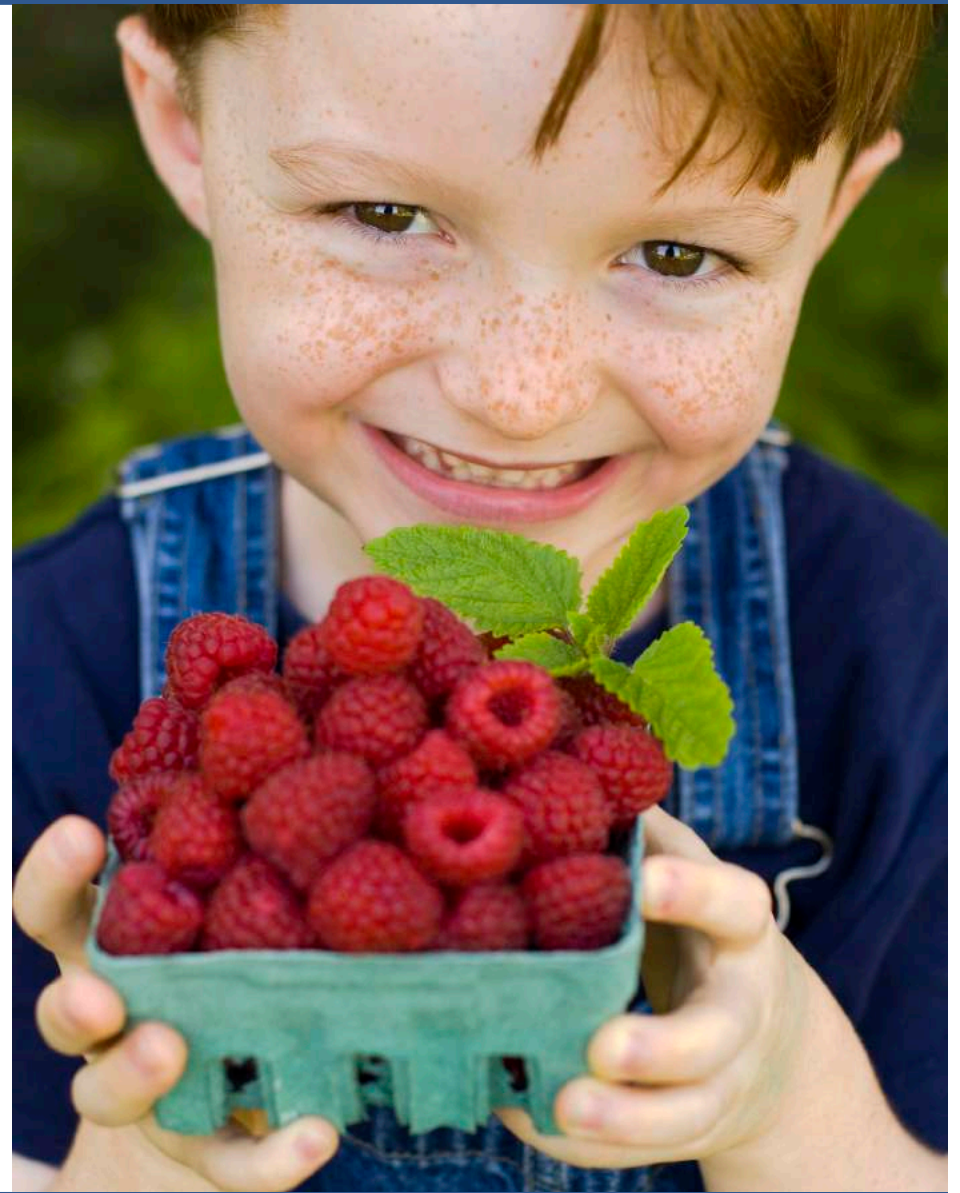
20 FLAVOR INSIGHT 16 REPORT

Flavor for All Seasons

Make the Season Bright

When leaves are falling off trees and football season begins, consumer cravings for comfort food is at an all time high and conversely, when the temps rise, freshness and grilling are in demand. Seasonal flavors are a large part of the product development calendar. Keeping up with the changing seasons as well as the changing consumer flavor preferences are big hurdles.

Consumers hungrily anticipate the arrival of signature seasonal flavors and limited time offerings greeting them like long lost friends. Seasonal ingredients connote freshness to 45% of consumers and 63% of them enjoy seasonal flavors like pumpkin or ginger across many foods.¹ Consider this your guide to seasonal flavors and the consumers that are drawn to them.



Consumers Welcome Change

With more than half of consumers wishing they could have their favorite seasonal coffee treat all year long, it's clear that seasonal flavors have established themselves right with the classics.² Whether it is the celebratory feeling a seasonal flavor brings or the significance of time passing, consumers have an emotional pull towards these calendar treats, some more than others.

- Older Millennials, more than any other group, are most likely to embrace seasonal flavors in signature and unique items.³ Hmmm – Pumpkin Spice Latte (PSL) influence at play?
- One standout group that thinks seasonal flavors rule the world is the Hispanic population. Showing the highest interest of all groups, 69% of Hispanics will purchase the same item in different seasonal flavors and 57% will experiment with the same item in different seasonal flavors.⁴ Targeting the Hispanic population with seasonal flavors might be worth making a priority.
- Seasonal flavors have some clear geographic preferences with Westerners and Midwesterners ranking the highest in appreciation of seasonal flavors, especially the same flavor in different formats.⁵

50%

of consumers wish their seasonal coffee treats were available all year

69%

of Hispanics will purchase the same item in different seasonal flavors



The Seasons: A Handbook of Flavor

Overview: The Seasons

Given the popularity of seasonal flavors, we were excited to get to the bottom of their influence on consumers. The best place to start was to analyze new product introductions to gain a sense of the categories that demonstrated heavy seasonal activity. We then got to work identifying classics and up-and-coming seasonal flavors that stood out.

In this report, we present the information in an easy to follow format looking at category then flavor with a specific nod to Fall/Winter and Spring/Summer flavors. For beverages, we used the seasonal approach to consumption and have profiled hot beverages for fall and winter and cold beverages for spring and summer. We've also been sure to spotlight creative applications that bring these seasonal flavors to life.

And, don't miss our foodservice coverage and homage to Pumpkin Spice Latte (PSL), a seasonal flavor winner in it's own right but we of course have to wonder...when will its reign come to a spicy conclusion?

Fall and Winter

PSL has become a seasonal flavor machine and many other manufacturers, looking to capture their own shot of seasonal fever, have launched their own creations. Salted caramel, hot chocolate, peppermint and gingerbread are in hot pursuit of pumpkin spice's success and each has its following. Whether it's a surprising new potato chip flavor or a warming hard cider, the seasonal flavors of

fall and winter are cozy, spicy, and comforting when it's not so warm outside. While we make a food run to get our own seasonal fix, take some time to check out our list of the top flavors in each category, some fast tracking flavors and the cold weather seasonal treats manufacturers are cooking up.

Spring and Summer

While there isn't one flavor standout this time of year, spring and summer certainly claim their own flavor offerings centered around holidays like Valentine's Day and Easter and inspired by family events like backyard barbecues and campfires. Smoke, burnt, and fairground flavors excite palates in the warmer months while bringing their own brand of heat. Take for instance Oreo's creative flavor innovation. A limited edition Cotton Candy Oreo debuted in spring, sandwiching swirled pink and blue cream between two golden wafers. With a continuing nod to dessert and carnival applications, this snack follows the Red Velvet, Caramel Apple, and S'More Oreos. Here are the flavors consumers have to look forward to once the winter thaw takes place.



BREAKDOWN: THE CATEGORIES

Hot Beverages & Creamers

When the weather is cold, there's nothing like a cup of something to warm the toes. And the flavors consumers seek in fall and winter can only be described in one word—cozy. So whether in coffee, tea, hot cocoa, chai or creamers, these flavors make great fireside partners. The first new fall flavor in four years, Starbucks' Toasted Graham Latte had visions of campfire but was actually inspired by cereal milk.

And speaking of coffee, creamers are a playground for flavor loving consumers. 76% of creamer products in 2014 were flavor driven with 20% of these being made up of seasonal varieties.⁶

Capturing nostalgia, warmth and indulgence, flavors featured in seasonal offerings of hot beverages and creamers are most reflective of the fall and winter months. The flavors highlighted below should get you started on your next seasonal project.

Top Flavors

Pumpkin Spice
Peppermint
Gingerbread
Milk Chocolate
Cocoa
Peppermint &
Cocoa
Chocolate

Egg Nog
Pumpkin Pie
Marshmallow
Peppermint &
Coffee
White Chocolate
Cinnamon
Spice

Butterscotch &
Caramel
Caramel
Candy Cane
Double Chocolate
Mint Chocolate
Hazelnut
French Vanilla

Fall/Winter Flavors to Watch

Orange Spice
Pumpkin Pie
Maple Cream
Apple Pie
Gingerbread Spice

Products of Note

- Dunkin' Donuts White Chocolate Peppermint Coffee
- Green Mountain Sweet and Creamy Maple Cream Coffee
- Community Coffee Pumpkin Praline Coffee K-Pods
- Celestial Seasonings Caramel Apple Dream Herbal Tea
- H-E-B Christmas in a Cup Single Serve
- Dunkin' Donuts Apple Pie Blend



Where Country matches USA and Category matches Hot Beverages or Sub-Category matches Creamers and Claims matches Seasonal as the claim and Date Published is between Dec 2010 and current date (Dec 2015)

Refreshment Beverages

A big glass of refreshment goes a long way in the milder spring and steamy summer months. Consumers love to experiment with cold beverages and many employ them as cocktail mixers. While consumers generally seek familiar favorites they do welcome the occasional unique flavor. It's interesting to note that in the cold beverage category most of the innovation seems to revolve around packaging indicating there might be room for some seasonal flavor exploration. No matter the package, consumers find cold beverages refreshing and, thirst quenching and seasonal flavors add just a little more sparkle.

Top Flavors

Cola	Citrus
Orange	Citrus & Orange & Punch
Lemon Lime	Cola & Vanilla
Caramel Apple	Guava & Mandarin
Red or Green Grape	Horchata
Blackberry	Lemon
Peppermint	Lemon & Mango
Root Beer	Lemon & Watermelon
Vanilla Root Beer	Lemonade
Cinnamon & Clove	Pink Lemonade

Spring/Summer Flavors to Watch

Blueberry Lemonade
Grape Sugar Cane
Apple Lemon Mint Watermelon
Tropical Mai Tai

Products of Note

- Caphin Horchata Vietnamese Iced Coffee
- Polar Guava Mandarin Seltzer
- H-E-B Strawberry Bliss Flavored Soda



Where Country matches USA and Claims matches Seasonal as the claim and Category matches one or more of RTDs, Carbonated Soft Drinks, Juice Drinks and Date Published is between Dec 2010 and current date (Dec 2015)

Alcohol

Talk about a category that has a year-round seasonality. Alcohol, including spirits, beer, wine and more, has recently experienced a surge in flavor seasonality that is continuing to grow by leaps and bounds. Whether it is pumpkin ale in the fall, a cranberry orange shandy in winter or a hard peach lemonade in the summer, consumers enjoy the spirit of the season these flavors bring. Here are the top flavors as well as some more unique flavors found in the cold and warmer months.

Top Flavors

Pumpkin	Blackberry
Spice	Apple
Honey	Cinnamon
Chocolate	Egg Nog
Lemon	Irish Cream
Ginger	Strawberry
Citrus	Apple & Honey
Peach	Chocolate & Cherry
Pumpkin Spice	Orange Peel/Tangerine
Coffee	Peel
Lemonade	
Orange	

Fall/Winter Flavors to Watch

Cranberry Ginger
Cranberry Plum and Spruce
Cinnamon Horchata
Prickly Pear Cactus + Fig
Pumpkin Lemonpeel

Spring/Summer Flavors to Watch

Pink Grapefruit
Coriander + Cilantro +Lime
Sour
Banana Spice
Basil Mint
Lemon Margarita
Root Beer

Products of Note

- Headless Gentlemen Imperial Bourbon Pumpkin Porter
- Blue Moon Limited Release Chai Spice Ale
- Southern Comfort Gingerbread Spice Flavored Whiskey
- Mike's Hard Lemonade Hard Blood Orange
- Seattle Cider Company Basil Mint Hard Cider
- Smirnoff Ice Sparkling Pink Grapefruit Malt Beverage
- Evil Genius Beer Company Trick or Treat Chocolate Pumpkin Porter
- O'Fallon Brewery Strawberry Best Beer



Where Country matches USA and Claims matches Seasonal as the claim and Category matches Alcoholic Beverages and Date Published is between Dec 2010 and current date (Dec 2015)

Breakfast/Chocolate Confectionery/Bakery

The seasonal offerings in the breakfast, chocolate confectionery and bakery category offer a flavor bonanza. Fall and winter sweet applications showcase warm, spice filled flavors while the warmer months reflect more citrus, berry and fresh fruit alternatives. One surprising standout was raisin. Could it be that this throwback and very polarizing fruit could be experiencing a renaissance? When paired with sweet potato, it could have some serious health benefits but it's also being seen in a chocolate bark with peanut butter, which could win over some non-believers. Regardless how you feel about raisin, here are the top flavors we are seeing in these categories and a few standouts.

Top Flavors

Peanut Butter	Hazelnut
Peppermint	Almond
Chocolate	Vanilla
Caramel	Pretzel
Gingerbread	Pumpkin
Sugar	Strawberry
Mint	Peanut
Raspberry	Pumpkin Spice
Marshmallow	Coconut Orange

Fall/Winter Flavors to Watch

Peppermint Pretzel
Coconut Macaroon
S'Mores
Pomegranate
Apple+ Cinnamon+ Marshmallow
Hot Cocoa

Spring/Summer Flavors to Watch

Cookie
Honey Nut
Salted Coconut
Raisin + Sweet Potato
Fruit Cocktail
Citrus
Sour Cherry

Products of Note

- Splendid Milk Chocolate Candy Corn Truffle Bar
- In the Mix Pumpkin Pie Bark Chocolate
- Nestle Hot Cocoa Cookie Dough
- EduFoods Bitsy's Brainfoods Sweet Potato Oatmeal Raisin Smart Cookies
- Archer Farms Caramel Apple Biscotti
- Duncan Heinz Irish Crème Brownie Mix
- Tastykake Summer Key Lime Kandy Kakes
- Triscuit Toasted Coconut & Sea Salt



Where Country matches USA and Category matches one or more of Chocolate Confectionery, Bakery, Breakfast Cereals and Claims matches Seasonal as the claim and Date Published is between Dec 2010 and current date (Dec 2015)

Frozen Treats/Desserts/Dairy

Consumers consider a seasonal celebration as a time to indulge and nowhere is this more evident than the frozen dessert, ice cream and dairy categories. Whether a frosty companion to a cold weather brownie dessert or on its own in a sugar cone on a hot summer day, ice cream is a year round treat. Take for instance, creative Chicago-based manufacturer and retailer, Angelo Gelato Italiano. The company takes authentically produced gelato and puts a creative flavor spin on it with their sweet peach and fennel gelato or the avocado and lime zest.⁷ If this is the next level of ice cream, we are all in.

Top Flavors

Egg Nog	Gingerbread
Pumpkin & Spice	Orange
Peppermint	Cherry
Chocolate	Apple
Pumpkin	Milk Chocolate & Vanilla
Vanilla	Snickerdoodle
Strawberry	Chocolate Truffle
Chocolate + Mint	Chocolate + Peppermint
Pumpkin Pie	Vanilla Egg Nog
Peppermint & Coffee	Red Velvet

Fall/Winter Flavors to Watch

Snickerdoodle
Red Velvet
Candy Cane
Pumpkin Cheesecake
Cranberry Crème Brulee
Apple Cranberry Spice

Spring/Summer Flavors to Watch

Jelly Bean
Cherry Lime
Pink Lemonade
Rocky Road
Cherry Lime
Mango & Jalapeño Pepper

Products of Note

- Ellenos Pumpkin Pie Real Greek Yogurt
- Oikos Gingerbread Flavored Greek Recipe Dairy Snack
- Alouette Cranberry Apple Spice Soft Spreadable Cheese
- So Delicious Holiday Flavors Nog Coconut Milk Beverage
- H-E-B Candy Cane Ice Cream
- Casper's Fat Boy Egg Nog Ice Cream Sandwich
- Ciao Bella Pumpkin Sea Salt Caramel Gelato
- Trader Joe's Mini Ginger Pumpkin Ice Cream Mouthfuls
- Turkey Hill Key Lime Ice Cream
- Yarnell's Strawberry Lemonade Gelato



Where Country matches USA and Claims matches Seasonal as the claim and Category matches one or more of Desserts & Ice Cream, Dairy and Date Published is between Dec 2010 and current date (Dec 2015)

Snacks/Bars

Enjoyed year round, snacks like chips, bars and popcorn are consumer favorites. And with snacking taking over, consumers look for lots of flavor variety. In addition to flavor variety, seasonal snacks create an opportunity for shape exploration. Think Limited Edition Ritz Snowflake crackers or pretzel maker, Old Dutch's Holiday Trees, Bells and Stars. While sometimes the shape might not be an exact replica of their inspiration, the spirit is appreciated by consumers...most of the time, as Reese's just experienced with their Peanut Butter Trees. At the end of the season, taste still rules for consumers. And when the seasons change, new flavors and returning seasonal classics become consumer favorites in the snack category.

Top Flavors

Cheddar Cheese	Sea Salt
Strawberry	Fruit
Cheese	Berry
Marshmallow	Cinnamon & Sugar
Caramel	Candy Corn
Chocolate	Gingerbread
Butter	White Chocolate + Peppermint
Orange	Honey
Cherry	Pumpkin
Peppermint	Butter Toffee
Grape	

Fall/Winter Flavors to Watch

Chili Pepper
Apple Cider + Yogurt
S'mores + Nut
Cinnamon Sugar + Sweet Potato
Pumpkin Pie

Spring/Summer Flavors to Watch

Honey Roasted Peanut +
Chocolate
Lime
Watermelon

Products of Note

- Trader Joe's Turkey Stuffing Seasoned Kettle Chips
- Pringles Pigs in a Blanket
- Pringles Pecan Pie
- Creative Snack Co. Apple Cider Yogurt Pretzels
- Archer Farms Cinnamon and Sugar Sweet Potato Tortilla Chips
- Rhythm Superfoods Cranberry Orange Kale Chips
- Archer Farms Dipped Caramel Apple Granola Bars
- Clif Iced Gingerbread Energy Bars
- Cheetos Sweetos Cinnamon Sugar Puffs



Where Country matches USA and Claims matches Seasonal as the claim and Category matches Snacks and Date Published is between Dec 2010 and current date (Dec 2015)

Sugar Confectionery/ Gum/Lip Care

Even the gum and lip care category has not been immune to the seasonal flavor craze. Of the 53% of consumers who treat themselves to sugar confectionery, more than half are more likely to partake in seasonal offerings.⁸ Given that the sugar confectionery market is expected to grow another 17% by 2019, the opportunities seem sweet.⁹

And with 72% of Millennials aged 18-24 carrying some form of lip balm, seasonal flavors are an obvious fit.¹⁰ The lip care market sees seasonal flavors as a way to capture the excitement a holiday season brings. Take the “naturally fun” lip balm company, Crazy Rumors, whose lip balms are full of holiday flavors like Gingerbread, Hot Cocoa, Cinnamon Bun and Plum Peppermint to smooth wintertime lips and summertime flavors like Orange Creamsicle, Lemonade and Banana Split. Treating mouths and lips to some holiday zip are the following fun concepts.

Top Flavors

Cherry	Apple
Strawberry	Lime
Orange	Blue Raspberry
Watermelon	Blueberry
Grape	Raspberry
Peppermint	Cinnamon
Lemon	Berry
Fruit	Apple & Sour
Green Apple	Peach
Vanilla	Punch
Sour	Candy Cane

Fall/Winter Flavors to Watch

Caramel Apple
Red Velvet
Vanilla Marshmallow
Pumpkin Seed
Gingerbread Pecan

Spring/Summer Flavors to Watch

Sour Lemon
Lemon + Orange + Strawberry
Orange + Strawberry + Watermelon
Grape Soda
Banana Split
Cotton Candy
Rose

Products of Note

- Starburst Halloween Mix
- Brach's S'mores Candy Corn
- Extra Apple Crisp Chewing Gum
- Tic Tac Green Apple or Cherry Apple Twist
- ChapStick Gingerbread Kiss or Cinnamon Buns
- Extra Confetti Cake Pop
- Tic Tac Summer Ice Pop



Where Country matches USA and Claims matches Seasonal as the claim and Category matches Sugar & Gum Confectionery or Sub-Category matches Lip Care and Date Published is between Dec 2010 and current date (Dec 2015)

Spotlight on Foodservice and Seasonal Flavors

Foodservice plays the seasonal game very well. With easy access to unique, fresh ingredients, foodservice chefs take innovation very seriously, creating menus inspired by the seasons.

FALL/WINTER

For consumers looking to extend the Thanksgiving bounty, White Castle introduced Butterball Turkey Dinner Slider topped with sweet potato waffle fries and cranberry sauce. And for breakfast, an indulgent visit to IHOP for consumers included the Pumpkin Waffle Sundae, but if that's not enough, consumers were treated to Dunkin Donuts Snickerdoodle Croissant Donut, which might give the cronut a run for its crown, especially when chased down with a Sugar Cookie Latte.

On the healthier side of things, fast casual concepts like Panera Bread rotate soup and salad offerings that reflect the weather outside to keep menus interesting and consumers satisfied. Take Panera's Vegetarian Autumn Squash Soup and Roasted Turkey Apple Cheddar Sandwich—it's fall on a tray. Finally, Starbucks' Holiday Spice Flat White is a twist on a mulled cider but instead finds tangerine-tinged mulling spices steeped in two ristretto shots of their cult favorite Christmas Blend coffee.

SPRING/SUMMER

Fresh fast casual favorite Tropical Smoothie Café's features the seasons best with its Caribbean Jerk Chicken Slider showcasing fresh pineapple and mango salsa over spiced jerk chicken on a Hawaiian-style bun. Paired with their Watermelon Mojito with lime, mint and strawberry, a true refreshing seasonal menu item is created.

Craft sodas on restaurant menus are on a major upswing with consumers loving the handmade aspect. And it seems to be winning the soda race with flavor superstars like blood orange (increased a staggering 328% on beverage menus in the past five years), lavender (no slouch with 58% growth) and pomegranate (up 44%) out-sparkling the classics.¹¹

Another beverage with homegrown beginnings and nostalgic ties, lemonade, is being freshened up in foodservice with operators like Chick-fil-A serving up their signature fresh squeezed lemonade with vanilla soft-serve. Other frozen lemonade flavors are also winning over consumers such as blueberry, limeade, blackberry and watermelon.



The Power of Pumpkin Spice

It would be remiss not to salute the influence that pumpkin spice has had on the entire food and beverage market. There isn't a category that hasn't embraced the power of pumpkin spice given consumer's endless acceptance and love for what has already achieved a cult like following.

The question remains: what will be the next pumpkin spice? Predictions like kimchi because of the consumer's affinity for fermented flavors and banana (due to the recent popularity of the movie, Minions) have been made but only time will tell.

In the meantime, consumers can experience pumpkin spice in a dizzying array of these unique products:

- Pearl Pumpkin Spice Vodka
- Thomas' Pumpkin Spice Bagels
- HerbalLife Healthy Meal Shake Mix
- Archer Farms Pumpkin Spice Biscotti
- Hostess Pumpkin Spice Mini Donuts with Cinnamon Glaze
- Trader Joe's Pumpkin Pie Flavored Kettle Chips
- Williams Sonoma Spiced Pumpkin Braising Sauce
- Pumpkin Spice Latte M&M's



Blurring of Seasons

Of course there are flavors that defy seasonality and consumers crave year round. It's time to "shop your flavor portfolio" because we know that within it are flavors that are versatile enough to be showcased in both warm and cold weather applications. Here is a list of the flavors that you most likely are already using and can be leveraged from one season to the next to keep your consumers always satisfied.

Ginger: Spicy ginger is at home in both Moscow Mules in December as it is in summer's thirst quenching lemonade.

Cherry: A star in summer pies, handheld or otherwise, cherry is equally comfortable in chutney paired with pork in the fall.

Strawberry: A summertime classic in shortcake, strawberries featured with chocolate work well later in the year.

Chocolate: No question, chocolate is in a class all its own and has no true seasonal affiliation. Chocolate ice cream, hot brownies, candy – you name it, chocolate is sure to please no matter the season.

Citrus: Clementines in winter, lemon and limes in summer and grapefruit almost all the time make a clear case for citrus being a flexible flavor offering lots of pucker power.

Banana: There is nothing better than taking the high potassium superstar the banana, caramelizing some sugar on top to create a classic Bananas Foster, except maybe eating a frozen chocolate banana at a favorite summer carnival.

Vanilla: Necessary for most baking applications, vanilla rounds out and adds richness. Vanilla frozen yogurt in summer or rich vanilla in crême brulee in the fall, consumers welcome both year round.



FONA FOR ALL SEASONS

Whether you are looking for the perfect flavor to star in the next holiday coffee drink, a summertime beverage, or a seasonally inspired confection, FONA's application scientists are here to help. Seasonal flavors are driving innovation in many categories and consumers' interest in them isn't going to subside anytime soon. Let us help you create your next seasonal flavor-filled application! Contact us today.

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.

CONTACT OUR SALES SERVICE DEPARTMENT

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

SOURCES

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