

The background of the entire page is a dense, repeating pattern of bright yellow lemon slices, cut into thin rounds, showing the internal segments and white pith. The slices are arranged in a slightly overlapping, natural-looking pattern.

TASTE THE SEASON

A Look Back at Spring's Seasonal
and Limited-Edition Flavors

2018 • TREND INSIGHT REPORT

Spring has sprung! A season that signals new beginnings with longer days, warmer weather and the advent of the growing season, our taste buds also seem to reawaken with a strong desire for fresh, ripe and refreshing flavors. When it comes to flavor, an abundance of new and enticing seasonal product introductions certainly did not disappoint. We saw heritage fruit flavors take center stage while creative expression exploded, from both a color and flavor perspective. Let's see what you can take *forward* with you from this look back.

RIPE FOR THE PICKING: LEMON & STRAWBERRY

This past season we saw great momentum behind the perennial favorites of lemon and strawberry. Both flavors play to the season where fresh meets juicy and sweet balances tart.

Cold Stone Creamery highlighted both flavors in their Spring Desserts promotion. "Oh My Lemon Pie!" paid homage to lemon ice box confections and "Strawberry Short and Sweet," served as a nod to the iconic dessert of strawberry shortcake.

"It's all about the mighty lemon this spring, according to Kate Unger, senior vice president of marketing at Kahala Brand.

"Consumer confidence metrics, overall industry trends surrounding the lemon profile in general and the innovation that the Cold Stone Creamery brand is known for, all make for the much-anticipated promotional launch of our Lemon Pie Ice Cream!"

Consumers seemed to rally behind lemon in other categories as well. Krispy Kreme ran a flavor contest to determine a limited-edition spring flavor. Lemon glaze won, and was featured for a week.

Check out this array of seasonal lemon product introductions spotted on the shelf:



Trader Joe's Lemon Elderflower Sparkling Soda



Williams Sonoma Lemon Strawberry Quick Bread



Sour Punch Chicks & Bunnies Lemon and Watermelon Flavored Candy



Duff Goldman Premium Lemon Drop Cookie Mix

RIPE FOR THE PICKING: LEMON & STRAWBERRY

Strawberry was everywhere from early February with its obvious strong tie to Valentine's Day and carrying on through the months of March and April. We spotted red specialty drinks across the foodservice market that ran the gamut from adult drink menu specials to those that could be enjoyed by the entire family.

- Patron Strawberry Margarita was spotted at **Ruby Tuesday's**
- **TGIFridays** featured a Red Velvet Extreme Milkshake with red velvet cake crumbles and strawberry whipped cream.
- **Steak and Shake** had a deliciously decadent trio of shakes: Red Velvet, Oreo Red Velvet and Chocolate Covered Strawberry
- **Taco Bell** introduced a Strawberry Skittles Freeze
- **Dairy Queen** had a slight variation on their perennial favorite...a Chocolate Dipped Ghirardelli Blizzard.

One of the strong draws for strawberry this year goes beyond flavor and is based on color. The trendy color pink, often referred to as "**Millennial Pink**" has been successfully used to create Instagrammable moments for more than one brand... think about the "pink drink" that was all the rage last summer at Starbucks. This spring we saw Hostess capitalize on colors starting with their limited-edition strawberry "pink" Hostess Cupcakes. They played up color in the cupcake as well as the hair color of the girl in their retro looking Facebook posting.



Source: Hostess Facebook page



KEEN ON PEACH

Peach is another delicious, sweet favorite that seems to have caught product developers' attention. Whether utilized as a flavor in a traditional dessert or confectionary item or in beverages such as juice and soda it is one of the big trends for spring is expected to draw a lot of buyer attention straight on until summer.

So where did we see peach popping up?



Perrier added some fun new flavors and extensions beyond their classic line-up and peach was introduced just in time for peak stone fruit season according to their ads.



The cereal category continued to branch out with seasonal flavors and with a harbinger tweet in late February, "Spring is looking just peachy from here", **Cheerios** announced their limited-edition peach flavor would hit shelves in early March.



TastyKake did peach right with a Peach Cobbler Mini Donuts with crunchy layers of peach cobbler crumble and Peach Sweet Rolls with peach filling and creamy peach icing.



Coca-Cola launched two new locally inspired Coke flavors; California Raspberry and Georgia Peach. These two new flavors were launched to compete with new craft sodas entering the market and they come packaged in a 12oz. glass bottle hand with an etching of a peach or raspberry on the front label.

These are the first new flavor introductions since 2002 which was the year Vanilla Coke was released. Coke worked with 9,500 consumers and tested over 30 flavor options and raspberry and peach floated to the top!

COLOR + TASTE TEAM UP TO DELIVERY WHIMSY

Color and whimsy certainly draw attention but are they effective drivers of incremental sales? A plethora of products with vibrant colors (or in one instance, the lack of color) were introduced to signal spring. Yet taste plays a key role in determining the market success of creatively colored products. Let's explore the impact of color and flavor in these recent retail product introductions.

PEEP'S MYSTERY FLAVORS

So, let's start with Peep's Mystery Flavors which were a Walmart exclusive. These white Peeps come packaged with a question mark and are labeled as mystery marshmallow flavor #1, #2 or #3. Consumers are encouraged to taste and submit via social media their best guess at the mystery flavor. The results? #1 - Root Beer, #2 - Lemonade, #3 Blue Raspberry.



#1 ROOT BEER



#2 LEMONADE



#3 BLUE RASPBERRY

The lack of color in the Peeps is deliberate and the novelty of guessing the flavors is the added whimsy that sells these iconic Easter treats.

Since the limited-edition has survived four years in the Walmart system it would seem this innovation a resounding success.



STARBUCK'S CRYSTAL BALL FRAPPUCCINO

Well, they can't all be unicorns. Starbucks might have hit its limit with their latest frappuccino feature. Hoping for another success like that Unicorn Frappuccino,

the "Crystal Ball Frappuccino" offered a peach-flavored, green-glittered drink with different-colored "candy gems" that supposedly tell your fortune: Green indicates good luck, purple predicts enchantment and magic, and blue points to adventure.

According to *Marketwatch*: "The colorful beverage drove approximately an incremental 0.4% of the social-media mentions for the quarter, compared with an incremental 6.5% of social-media mentions for the Unicorn Frappuccino during the third quarter of 2017."

So where did it go wrong? Well the Unicorn Frappuccino drew its social media intensity from the visual of the drink and not necessarily the flavor. According to Mintel Ifegy, only 27% of Crystal Ball posts mentioned taste. Consider some of Starbucks' more successful LTOs: Taste was mentioned in Christmas Tree Frappuccino in 57% of posts and Zombie hit 43%.

BOTTOM LINE: TASTE MATTERS!

A TALE OF TWO COOKIES: OREO LTOs REVEAL THE IMPORTANCE OF TASTE

Oreo has been quite prolific in their limited-edition flavor introductions. Let's examine three of their spring intros that seemed to illustrate how flavor and color has the potential to raise consumer purchase intent. The right flavor is critical, as we see in the comparison of Oreo Hot & Spicy Cinnamon Candy and Oreo Peeps with their marshmallow flavored center.



Hot & Spicy Cinnamon Candy Oreos launched in January. With a red center it looked to be well positioned as a Valentine's Day candy option in cookie form.

Unfortunately, it did not perform particularly well with only a 28% purchase intent compared to the entire sub-category of Sweet Biscuits and Cookies holding a purchase intent of 40%. Consumer response shows that though the pairing was unique, Cinnamon & Oreo just do not go together!



However, **Oreos Peeps** (+12% points over the sub-category with a 52% purchase intent) significantly outperformed the overall cookie and biscuit sub-category. The taste is a hit.



Finally, in the case of **Oreo's Spring** which was simply a vibrant yellow color play with the classic Oreo center. With its spring cues on package, this product had the best performance sales indicators with (+22% over the sub category with a 62% purchase intent) significantly out-performing the overall subcategory of sweet biscuits and cookies.

UNICORNS ARE...FOREVER?

Although 2017 has long since ended, we're spotting the continuation of one of its biggest trends — unicorns — through Spring 2018. Unicorns are still galloping across grocery aisles and menus — even joining people at their breakfast tables

Kellogg's introduced its Unicorn Cereal in March 2018. The vibrant red, blue, and purple loops with white crunchlets, are billed as a "magic cupcake" which seems very reminiscent of birthday cake flavor (a taste with a long life of its own, independent of season.) Kellogg's cereal is not being billed as seasonal but rather limited-edition and could enjoy a long run or even periodic short sprints in and out of the marketplace. General Mills also has announced that it is adding a unicorn marshmallow to Lucky Charms... and in this case the addition is permanent, perhaps to accentuate the "magically delicious" flavor? Taste is key, and we will be watching for strong repeat sales and continued buzz across social media platforms on both of these breakfast favorites.



THE TAKEAWAYS

What can you bring forward in your product development from this look back? Heritage flavors like strawberry and peach deliver strongly but getting creative can help you stand out on-shelf. Cases like Cinnamon Oreos & Crystal Ball Frappuccino show that taste matters. Consumers like whimsy & fun but consider your flavor a first priority.

YOU DESERVE MORE. LET'S GET STARTED.

What does true partnership look like? You deserve a taste partner ready to turn these trends into the tangible.

Let FONA's market insight and research experts get to work for you. Translate these trends into bold new ideas for your brand. Increase market share and get to your "what's next." Our technical 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. Let's 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 for you — every step of the way. Contact our sales service department at 630.578.8600 to request a flavor sample or chat us up at www.fona.com/contact-fona/

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