



TASTE THE SEASON

A Look Back at Fall Reveals
a Forgotten Favorite

2018 • TREND INSIGHT REPORT

When fall rolls around and the leaves start to change there are always plenty of pumpkins, monsters and ghouls and even a little witch's brew—but there is one flavor that has been forgotten in the sea of pumpkin spice: Apple. Let's take a closer look at an old favorite that is making its way into new product categories and is actually outperforming pumpkin spice when it comes to consumer perception and purchase intent.

AN APPLE A DAY...

The first apple trees in the United States were planted in Massachusetts in the early 1600s. Today, apple lovers across the U.S. eagerly await the fall harvest, with its promise of pies, crisps, cobblers and cider. Apples range in color from lemony yellow to bright yellow-green to crimson red. Their textures range from tender to crisp, their flavors from sweet to tart and from simple to complex.

CONSUMER SENTIMENT

When comparing consumer sentiment head-to-head, it's clear that both apple and pumpkin spice are both beloved. However, when rating consumer's immediate perception, apple actually outperforms pumpkin spice in several areas. Apple flavor is in fact perceived as healthier and more natural. On the other hand, pumpkin spice is perceived as being more indulgent and unique. But the real indicator is consumer purchase intent—apple flavored products have a 5% higher purchase intent than pumpkin spice flavored products within the U.S. Even with as widespread as pumpkin spice has become, there is still room at the table for Grandma's apple pie.

Apple flavor outperforms pumpkin spice on several fronts, and is perceived as healthier and more natural.



CINNAMON

is the top flavor
paired with apple.



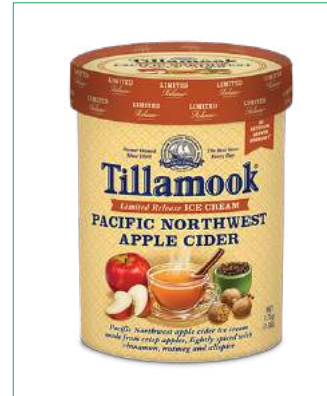
Source: Mintel Purchase Intelligence

HARVEST CIDER

One of fall's favorite beverages, apple cider, is making its way into other product categories beyond the traditional warm beverage. There has been 62% growth in apple cider flavored new products in North America from 2016-2017 according to Mintel GNPD. Already in 2018, we are spotting an array of apple cider flavored products. Top product categories include: juice, dressings and vinegar and meal replacements and other beverages.

The combination of fall's favorite spices with crisp apples screams comfort and nostalgia to consumers. Spices like cinnamon, nutmeg and clove are traditionally used in fall baking and ciders. To set your product apart, consider pairing apple with flavors that are not always stocked in the consumers spice cabinet including: star anise, cardamom, or chai.

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Tillamook Pacific Northwest Apple Cider Ice Cream

- Limited release ice cream.
- Includes simplified ingredient statement without sacrificing taste. Made from egg yolks and plant-based gums for a smooth and creamy texture.
- Made from crisp apples, lightly spiced with cinnamon, nutmeg, and all spice.



Trader Joe's Apple Cider Jam

- Made with Granny Smith and Roma apples, apple cider, and spices including cinnamon, allspice, cardamom, cloves, coriander, ginger, and mace.
- Described as sweet and tart, superbly (but not overly) spiced, thick and spreadable, with chunks of apples in every jar.



Suja Organic Cold-Pressed Spiced Apple Cider

- Spiced apple cider that only contains organic apple juice, organic Vietnamese ground cinnamon and organic clove powder.
- Description: "Grab some fall in a bottle with our seasonal cider! We've taken the best parts of the season and cold-pressed them into something deliciously refreshing."

APPLE

ON THE MENU: Q3 2017-Q3 2018

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7,776

APPLE MENTIONS
ON THE MENU

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On restaurant menus, we are spotting a 13% growth in apple flavored menu items from Q3 2017-Q3 2018.

Casual Dining is the top restaurant segment, with beverage, dessert and baked goods as the top three menu sections with the most apple flavored items. Beverages account for 72% of all apple flavored menu items.

MENU MENTIONS:

- **Apple Spice Mule** which includes Jim Beam Apple Whiskey, diced apples, and lemon juice topped with Ginger Beer at Ruby Tuesday's nationwide.
- **Cinnamon Crème Brûlée with Apple Sorbet** at Mansion on Turtle Creek in Dallas, Texas.
- **Apple Blue Cheese Cupcake** which includes a Fresh apple cupcake, frosted with a cream cheese and bleu cheese buttercream at Yummy Cupcakes in Michigan and California.
- **Caramel Apple Cider Milkshake** at Sheetz Bros. Coffee in Altoona, Pennsylvania.

ONE AND DONE!

In the September issue of Food Network Magazine, they highlight sheet pan breakfast options. A recipe for a sheet-pan apple spice pancake is included and combines Golden Delicious apples with a pancake batter and is topped with an apple cider whipped cream.

sheet-pan
apple spice
pancake



Source: Mintel Menu Insights

TAKEAWAYS

Looking back at the releases and trends of the fall -- as well as a investigation into consumer perception... It's all combined to reveal one thing: Apple is Fall's forgotten favorite. The classic taste of apple is outperforming pumpkin spice in several areas and in fact consumers say they are more likely to purchase apple-flavored products than pumpkin spice offerings. How can you bring this taste to your product development in new and unexpected ways? One suggestion from the FONA experts: consider pairing apple with flavors that are not always stocked in the consumer's spice cabinet including: star anise, cardamom, or chai.

FONA FOR ALL SEASONS. YOU DESERVE MORE. LET'S GET STARTED.

What does true partnership look like? You deserve a flavor 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 630.578.8600 to request a flavor sample or chat us up at www.fona.com/contact-fona/

SOURCES

- *Mintel GNPD*
- *Mintel Purchase Intelligence*
- *Mintel Menu Insights*
- *Food Network Magazine*
- *Tillamook*
- *Trader Joe's*
- *Suja Juice*
- *Williams Sonoma Savoring America*
- *Food Lover's Dictionary*

