

A top-down photograph of several cookies on a light-colored, weathered wooden surface. The cookies are decorated with white icing, chocolate, and various toppings like red and black sprinkles and heart-shaped candies. One cookie is heart-shaped with white icing and sprinkles. Another is rectangular with white icing stripes and heart candies. A third is heart-shaped with chocolate icing and sprinkles. A fourth is round with plain yellow icing. The background is a rustic wooden table.

# BEYOND THE SEASON

## A Look Back at Winter with a Future Focus

There's much more to winter's seasonal releases beyond the tried and true holiday flavors and Valentine's chocolate. We're exploring the claims, flavor innovation and attention-worthy releases of the season – with an eye towards lessons for your future products. Let's take a look back to learn and move forward.



# CLAIMS

Looking specifically at seasonal products released this winter, **the top growing claims align with overall consumer trends in the broader food and beverage market.** For example, the 550% increase YOY in vegetarian claims aligns with the huge uptick in plant-based positioning; while a 200% increase in diet claims makes sense given consumer interest in keto, paleo and other meal plans. Interestingly, antioxidant claims are down 100% year-over-year.

Consumer perception backs up the uptick in vegetarian positioning. When asked about their initial perception, consumers rated vegetarian products as both more unique (4.7% higher than non-vegetarian products) and more filling (3.2% higher). Both vegetarian and non-vegetarian products were seen as equally tasty, in terms of initial perception.



## TOP GROWING CLAIMS IN SEASONAL PRODUCTS, NORTH AMERICA

(comparing year-over-year)

- Vegetarian **+550%**
- Functional—Cardio Vascular **+300%**
- Sugar-free **+200%**
- Vitamin/Mineral Fortified **+200%**
- Diet/Light **+200%**

# FLAVORS

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In so many ways, butter is back in favor. And it's back in flavor as well, particularly in seasonal product introductions. In fact, it's the only flavor to appear on both of our flavor listings: fastest growing & flavor used most often. Releases with butter flavor show an increase of 500% growth compared to prior year.

When looking at number of releases, it's perhaps no surprise that **sweet flavors dominate in the winter months**. Cherry, strawberry, orange, and chocolate dominate in a season rife with indulgence-fueling holidays like Christmas and Valentine's Day.

## GLOBAL LOOK

The fastest Growing Flavors in seasonal products globally include: Rice, Cake/Pie/Tart, Dried Fruit, Crème Brulee, Panettone & Mince Pie. Each of these flavors are up more than 400% year-over-year.

## FASTEST GROWING FLAVORS IN SEASONAL PRODUCTS, NORTH AMERICA

(comparing year-over-year)

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- Butter **+500%**
- Pretzel **+400%**
- Cocoa/Cacao **+300%**
- Dark/Black Chocolate **+300%**



# Top Flavors by Number of Releases: November 2018–February 2019



BUTTER



PEANUT BUTTER



CARAMEL/CARAMELIZED



PEPPERMINT



CHERRY



STRAWBERRY



CHOCOLATE



HAZELNUT



ORANGE



# SEASONAL SELLERS



We've looked at releases, but what are the seasonal products that actually made money this winter? Top sellers with seasonal positioning reveal (no surprise) buttery goodness, unique spins on chocolate and a few savory selections.

Back to butter: Ghirardelli found success with a buttery toffee and cookie crunch chocolate; Lindt went the buttery Snickerdoodle route and Tate's Bake Shop called out the taste with their successful Butter Crunch Cookies. In food service, Starbucks capitalized with their January release of their Cinnamon Shortbread flavor.



## TOP-SELLING SEASONAL PRODUCTS

(Winter 2018/2019)



- Carrot Cake Flavored Oreos
- Hot Cocoa Flavored Kisses
- Brach's Blueberry Candy Canes
- Lava Cake Flavored Kisses
- Tollhouse Cookie Dough with Green and Red Sprinkles
- Polar Blackberry Clementine Seltzer
- Mountain Dew Merry Mash-up
- Lindt White Chocolate Snickerdoodle Truffles
- Tate's Butter Crunch Cookies
- McCafe Coffee 12 Pods of Christmas
- FarmRich Sweet Onion Petals
- Tattooed Chef Parmesan Potatoes
- Tattooed Chef Riced Cauliflower
- Holiday Blend with Maple Vinaigrette
- Ghirardelli Toffee & Cookie Crunch
- Ben & Jerry's Minter Wonderland Ice Cream

SOURCE: MINTEL/IRIS



# NEW INGREDIENTS IN SEASONAL LAUNCHES

A few new ingredients appeared for the very first time in seasonal launches, and they reveal alignment with overall consumer trends. A few of the ingredients of note:



BASIL SEED JUICE



NATURE IDENTICAL  
COCONUT-LEMONADE FLAVOR



CAULIFLOWER POWDER



TOM YUM FLAVOR



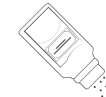
CHARGRILLED BEEF RIB  
FLAVOR



SALTY LICORICE FLAVOR



ELDERBERRY OIL



VADOUVAN



MATCHA GREEN TEA  
KOMBUCHA



NATURAL HEMP



VANILLA TEA FLAVOR

CBD LAUNCHES ARE TAKING OFF, EVEN IN SEASONAL LAUNCHES. FOOD DIVE POINTS OUT THAT LORD JONES SOLD A LIMITED EDITION VALENTINE'S DAY CBD GUMDROP SET FEATURING PASSION FRUIT AND RASPBERRY FLAVORS.

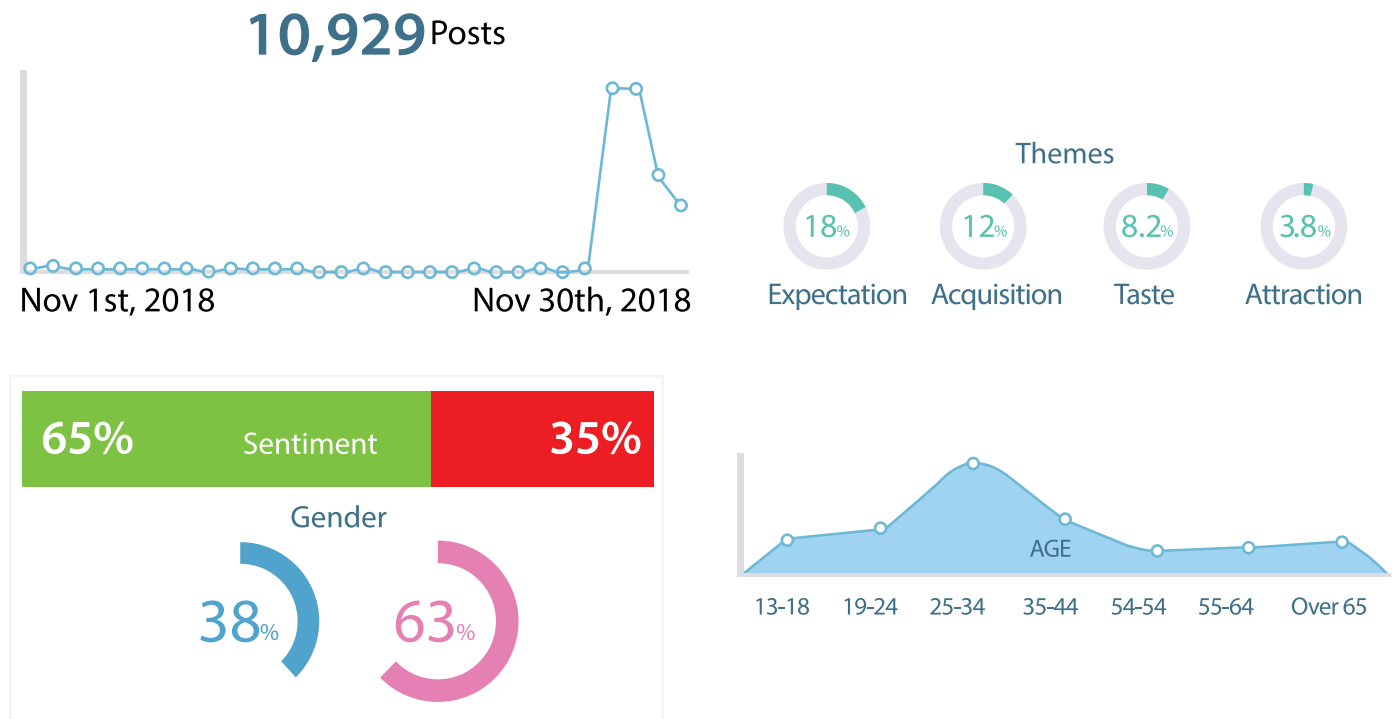
# FLORAL EVEN IN THE FREEZE



We called out [interest in floral flavors](#) recently, and that botanical bonanza maintained throughout the winter season. Most notable this season was Starbucks' release of juniper-flavored beverages in late November. Vogue described it as "kind of like you went to a 16th century apothecary for your morning cup of joe." Although reviews were mixed, social media reveals that consumers overall viewed the new drink positively, particularly among women 25-34. The theme of Expectation was revealed in about 18% of online conversation, showing clear excitement for trying the new menu item.



## STARBUCKS: JUNIPER LATTE



SOURCE: MINTEL/INFEQY

# RUBY CACAO GETS MIXED RESPONSE



A few companies attempted seasonal ruby cacao releases in America this year, including Chocolove, Harry & David, Trader Joe's and Vosges Haut-Chocolat. The Daily Meal points out that the pink-hued chocolate swept through Japan, South Korea and the UK. Nestle released ruby chocolate Kit Kats in Asia and the UK earlier in 2018, and the taste is starting to appear in seasonal releases in the U.S.

Although ruby chocolate got 94% positive perception in social posts this winter, consumer purchase intent tells a different story. In fact, looking at the Harry & David Ruby Cacao Truffles launched in February 2019, only 35% of consumers polled said they would try it – significantly underperforming compared to others seasonal chocolates.

## Consumers in Their Own Words:

Looking at the consumer responses, it seems that ruby cacao faces a bit of an uphill challenge when it comes to consumer awareness. Consumers also had a bit of sticker shock over the price of the ruby truffles, with a vast majority of consumers commenting on the expense.



Probably strawberry and I am allergic.

-FEMALE, WEST, 35-54

If it's chocolate, make it chocolate.

-MALE, MIDWEST, 55+

If I am going to indulge,  
I'd rather eat chocolate.

-FEMALE, NORTHEAST, 55+







# THE TAKEAWAYS

There are a few lessons to take forward from this winter season's food and beverage launches and consumer interests. First, developers bet on butter – and it worked. The flavor appeared in both the fastest growing (up 500%) and most often used flavor list, and was a feature of several top-selling seasonal products this season. Can you take that lesson from this winter season forward as you prepare for your next LTO? Consider also the unique innovation in chocolate – lava cake and hot chocolate formats sold well, while ruby chocolate has not quite achieved wide consumer acceptance quite yet. New seasonal launches are pushing the boundaries beyond typical winter fare as tastes like juniper and ingredients like hemp start to capitalize on consumers interest in the perceived earthy and natural.

## 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 our sales service department at 630.578.8600 to request a flavor sample or chat us up at [www.fona.com/contact-fona/](http://www.fona.com/contact-fona/)



## SOURCES

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