



FLAVOR INSIGHT

Freedom to Go Floral

With the fervor over plant-based food and beverage, it's no surprise that botanical flavors and floral tastes are garnering consumer interest as a result. Floral tastes and ingredients are adding a touch of complexity and a specialness to new food and beverage products and recipes across the spectrum of applications. From savory snacks to ice cream; vodka to yogurt; syrup to spice mix – let's look at the botanical bonanza in the industry, and see what lessons product developers can take away for the future.

PLANT POWER

There is a fervor around plant-based food and beverage. According to Iconoculture, sales of **plant-based foods grew by 20% in one year alone** – between June 2017 and June 2018, reaching a total of \$3.3 billion. Connected to clean label and the overall health and wellness movement, plant-based ingredients are viewed by consumers as both more natural and healthier. In this environment, floral and

botanical flavors align perfectly. Yet Mintel notes that product launches using floral flavor components are actually among the least prominent, although the number grows each year.

THE FUTURE OF FLORAL FLAVORS IS PRIMED FOR GROWTH, in our opinion.

Consumers continue to be interested in the flavor and nutrition of plant products. Mintel notes broad opportunities for product developers to create more packaged food and drink with plant-based products – in particular botanicals – to provide consumers with the nutrition and taste they seek.



CATEGORY INTRODUCTIONS IN BLOOM



Floral isn't just for tea anymore. In the Sept 2018 edition of AllRecipes magazine, floral flavors are called out as on-trend. Featured are Jeni's SuperMoon ice cream (using candied blue violet); Just Spices Blossom Mix; and Runamok Hibiscus Flower Infused Maple Syrup.

In fact, releases of floral-flavored products span the spectrum, with snacks, beverages and bakery leading the way. In one year alone (Q3 2017 -Q3 2018) we spotted **4,495 product introductions using floral flavors released globally.**

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“Clever cooks and companies are using lavender, hibiscus, violets and other flower to add color and flavor to everything from syrups and spice mixes to chocolate and ice cream.”

- AllRecipes Magazine, Sept 2018

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Top Categories for FLORAL-FLAVORED PRODUCTS



SNACKS



CARBONATED SOFT DRINKS



HOT BEVERAGES



SUGAR + GUM CONFECTIONERY



JUICE DRINKS



RTD BEVERAGES



BAKERY



DAIRY



SAUCES + SEASONINGS



OTHER BEVERAGES



Top Claims

NO ADDITIVES / PRESERVATIVES | ORGANIC | ECO-FRIENDLY PACKAGE
LOW / NO / REDUCED ALLERGEN | LOW / NO / REDUCED SUGAR

NEW + DIFFERENT

New Ingredients Appearing in Floral-flavored products in the last 12 months

1. Bitter Almond Extract
2. Sardine Stock
3. Cod Roe Seasoning
4. Sea Kale
5. Fig Leaf

PRODUCTS OF NOTE:



LIPTON STRESS LESS HERBAL SUPPLEMENT

is said to be a cozy herbal infusion. Contains cinnamon, chamomile and lavender with natural essential oils.

45%

CONSUMER PERCEPTION

45% of consumers polled said they'd possibly buy this product, **SIGNIFICANTLY OVERPERFORMING** against subcategory.



LIFEWAY SMALL BATCH KEFIR CUP

STRAWBERRY-ROSEHIP is made from cultured nonfat milk and cream. Uses organic strawberry and rosehip flavors and is said to be high protein and low sugar.

18%

18% of consumers polled said they'd consider buying this product, **UNDERPERFORMING** against subcategory.



STRONGBOW ORANGE BLOSSOM HARD

APPLE CIDER is said to have a spring-like fresh orange blossom aroma with a touch of sweetness and a juicy apple finish.

53%

53% of consumers polled said they'd consider buying this product, **SIGNIFICANTLY OVERPERFORMING** against subcategory.



LUSH GOURMET COCONUT LAVENDER

SALTED ALMONDS are a sweet and savory almond treat handcrafted in small batches and said to be of the highest quality cinnamon, chamomile and lavender with natural essential oils.



NEW + DIFFERENT Continued...

Starbucks released multiple floral-flavored products in 2018, including a Butterfly Pea Flower Lemonade Cold Brew (February) and a Juniper Latte (and Frappuccino) in late November.



"A mesmerizing hue of blue Butterfly Pea flower tea layered with refreshing lemonade and topped with deliciously smooth Starbucks Cold Brew coffee."



"Our signature espresso and steamed milk mingle beautifully with juniper syrup. This beverage has a light, pine-like flavor with delightful citrus undertones."

Head to head: HIBISCUS + ORANGE BLOSSOM FACE OFF



What floral flavors do consumers prefer? Let's take two of the most popular botanical tastes and compare consumer perception side-by-side. **The results?** While hibiscus is viewed as more healthy and natural – orange blossom is more likely to be viewed as better tasting and more fun.

Compared to **Hibiscus Flavor**, **Orange Blossom Flavor** received a rating that was 11.6 percentage points higher for the attribute **Tasty**, followed by **Fun** with a difference of 9.8 percentage points. In comparison, **Hibiscus Flavor** outperformed **Orange Blossom Flavor** on being seen as **Healthy** (by 13.7 percentage points) and **Natural** (by 8.5 percentage points).



Consumers in Their Own Words:

ON HIBISCUS:

I really like Hibiscus, I find it very refreshing. Anything with berry is appealing, too... looks refreshing and healthy.

-FEMALE, MIDWEST, 21-34

It doesn't really seem like something I would be interested in trying... I'm not sure what hibiscus would even taste like.

-FEMALE, WEST, 21-34

ON ORANGE BLOSSOM:

Extremely new and different. FLEUR D'ORANGER. I love trying new and exciting products.

-MALE, MIDWEST, 21-34

I'm confused by it and a little creeped out. No clue what orange blossom tastes like. The upside is the trusted brand.

-FEMALE, NORTHEAST, 35-54

THE TAKEAWAYS

It's only natural (no pun intended) that floral flavors align with consumer interest in clean label and nutrition-rich food and beverage. Many consumers see a floral flavor and it feels familiar – yet unique – at that same time. Floral flavors add a complexity and newness to food and beverage across the spectrum of applications. But not all products can be winners, however. For example, while Starbucks has gained traction with assorted floral tastes – a product like rosehip kefir does not share the same interest from a broad base of consumers. Consider too our face-off with orange blossom and hibiscus – is it more important that your product be healthy or fun? These questions can help inform your development, no matter where your ideas take root and blossom.

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/



SOURCES

- Mintel
- Mintel GNPD
- Purchase Intelligence
- Iconoculture
- AllRecipes.com Magazine (Sept 2018)
- lushgourmetfoods.com
- Starbucks.com