



BEYOND THE SEASON

A LOOK BACK AT SPRING LTO & SEASONAL RELEASES, WITH A FUTURE FOCUS

While chocolate eggs and bunny tails rule seasonal releases in spring, there's a lot more going on than meets the eye. From lime and pineapple splashing into spring to those "limited time" offerings that end up with permanent staying power, we're exploring the claims, flavor innovation and attention-worthy releases of the season. And in doing this, we're keeping an eye towards lessons for your future products. Let's take a look back to learn and move forward.

TOP FLAVORS IN: Seasonal Products

Who knew blue raspberry and crème brulee were global hits? The tastes are on the lists of fastest growing flavors in seasonal products in North



America and globally. In North America, peanut butter's presence in Easter confections is evident – it appears as both one of the top flavors overall and fastest growing year-to-date.

TOP FLAVORS BY NUMBER OF RELEASES: North America, Spring 2019

- | | |
|--|--|
| ■ Lemon | ■ Peanut Butter |
| ■ Chocolate | ■ Candy |
| ■ Fruit | ■ Watermelon |
| ■ Marshmallow | ■ Sugar Flavor |

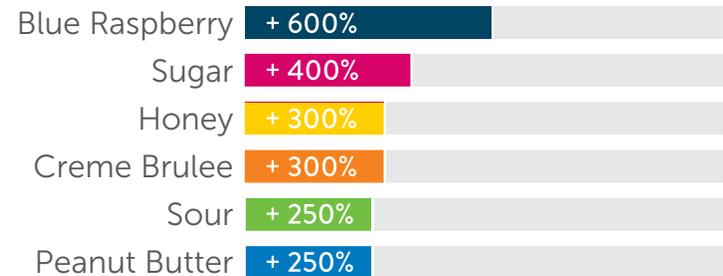
FASTEST GROWING FLAVORS: GLOBALLY

Seasonal Products, YTD



FASTEST GROWING FLAVORS: NORTH AMERICA

Seasonal Products, YTD



EASTER CANDY RULES THE SPRING

Easter candy is big business when it comes to spring seasonal releases. Says Food Dive: "The most important part of getting the stage set for Peter Cottontail's big day is spending time with consumers, 87% of whom are expected to purchase Easter candy." That consumer interest reveals itself in the IRIS top sellers.



TOP 10 SEASONAL SELLERS-IRIS

- Cadbury Shimmer Mini Eggs
- Junior Mint Eggs
- Cheetos Eggs
- Hershey's Gold Eggs
- Reese's Build-a-Bunny Milk Chocolate Peanut Butter Candy
- Nestle' Easter Chocolate Chip Cookie Dough with Pastel Sprinkles
- M&M Shell Smashers
- Snickers Shell Smashers
- International Delight Oreo Iced Coffee
- Jelly Belly Easter Egg Mix



In order to re-invigorate the seasonal chocolate confectionery category, manufacturers should look to change formulations to include vegan and organic options, premiumize flavors and increase the sustainability of packaging.

- MINTEL



1,216 Easter launches globally

BEYOND CANDY:

Non-confectionery performers

Let's look beyond Easter confections products, to the other top sellers of Spring 2019. Here, we're spotting Oreo-flavored Iced Coffee; Watermelon-flavored Sparkling water and Fruit Medley Mini Wheats among the top 10 performers.

TOP SEASONAL SELLERS: NON-CONFECTIONERY PRODUCTS

- Cheetos Eggs
- Nestle' Easter Chocolate Chip Cookie Dough with Pastel Sprinkles
- International Delight Oreo Iced Coffee
- Bubly Sparkling Water – Watermelon
- Betty Crocker Limited Edition Lemon Mix
- Limited Edition Bunny Tail – Betty Crocker Cookie Mix
- Bubly Pineapple Sparkling Water
- Discovery Reserve American Red Lager – Budweiser
- Street Scene Carne Asada Tacos
- Fruit Medley Frosted Mini Wheats



PINEAPPLE & LIME

Freshen up seasonal offerings

Pineapple and Lime are flavors that made their way into seasonal products this spring, bringing home some positive results. In fact, Bubly's Pineapple Sparkling Water and Tate's Bakeshop Key Lime Cookies were both strong sellers, according to IRIS.

PRODUCTS OF NOTE



BUBLY PINEAPPLE SPARKLING WATER is made with pineapple and other natural flavors.

39%

39% of consumers polled said they'd possibly buy this product, **OUTPERFORMING** against subcategory. It was a top seller this spring.



MIKE'S HARD PINEAPPLE MANDARIN LEMONADE is a premium malt beverage. It is said to be refreshing made with natural flavors.

33%

33% of consumers polled said they'd possibly buy this product, **UNDERPERFORMING** its subcategory.



STOP & SHOP LIME GINGER MULE FLAVORED SELTZER WATER contains 0% juice and is free from alcohol and sodium.

38%

39% of consumers polled said they'd possibly buy this product, **OUTPERFORMING** its subcategory. It was a top seller this spring.

PINEAPPLE & LIME, CONT'D

OTHER PRODUCTS OF NOTE

TATE'S BAKE SHOP KEY LIME COCONUT COOKIES



Although not an enormous hit in consumer perception (28% of consumers polled said they would possibly purchase, underperforming against subcategory) Tate's Bake Shop Key Lime Coconut Cookies performed well in sales. In fact it was the **#11 IRIS seasonal seller** in non-confectionery launches.

ACE HILL LIME RADLER



Ace Hill Lime Radler is said to combine the premium simplicity of light Ace Hill Mexican Lager with tart, organic fruit juice.

HALO TOP ICE CREAM KEY LIME PIE



Halo Top Ice Cream Key Lime Pie is said to "sound like a dream and, to be honest, it's been a long time coming," according to Bustle.com. <https://www.bustle.com/p/halo-tops-key-lime-pie-flavor-just-hit-shelves-for-a-limited-time-17924956>

PINEAPPLE ROSÉ



Portland Cider Company released its Pineapple Rosé in mid-March and its taste is said to be "bursting with fresh juicy pineapples."

COSMIC PINEAPPLE COOLATTA



Dunkin' released a seasonal Cosmic Pineapple Coolatta this spring, which mixes the tastes of pineapple and blue raspberry together.





CONSUMER PERCEPTION

LIME FLAVOR

A look at how consumers view lime-flavored products: Products using lime or key lime flavor are viewed as both more **refreshing** (6.3 percentage points) and more **unique** (4.2 percentage points) than those products not using those flavors.

PINEAPPLE FLAVOR

A look at how consumers view pineapple-flavored products: Products using pineapple flavor are viewed as both more **refreshing** (9.3 percentage points) and more **unique** (7.2 percentage points) than other food and beverage products. Though by a smaller margin, pineapple-flavored products outperformed in other attributes as well, including: **indulgent treat, healthy & fun.**

FOOD SERVICE: When Seasonal Becomes Permanent

Food service is, of course, always a great place to spot LTO & seasonal offerings, and to scope a potential new innovation in your packaged food or beverage. What's noteworthy this spring were the seasonal offerings that became permanent offerings.

NOT SO IMPOSSIBLE, NOT SO TEMPORARY

Launched April 1 as limited offering, the Impossible Whopper (a meatless burger made from wheat and potato) will be added to menus nationwide. It showed "encouraging results," according to Consumer Affairs.



TROPICAL & HERE TO STAY

Starbucks Mango Dragonfruit Refresher launched last year as a seasonal item, and is now back in the form of the Dragon Drink –and permanent addition to the Starbucks menu. The product went through a bit of reinvention with the addition of coconut milk. Says Thrillist: "the pink beverage finds a happy medium between refreshment and indulgence." Starbucks also brought back their S'mores Frappuccino to its seasonal menu this spring.

THE TAKEAWAYS

There are a few lessons to take forward from this spring's food and beverage launches and consumer interests. It's no surprise that Easter rules the spring. In both confectionery and non-confectionery seasonal offerings alike, innovation led to some top sellers. From Oreo-flavored Iced Coffee to Watermelon-flavored Sparkling water — product developers veered from the tried and true, and it worked. Pineapple and lime also made some moves in seasonal launches this year, and there is still runway for those refreshing tastes yet. Are they a consideration for your brand?

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/

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