



BEYOND THE SEASON

A LOOK AT FALL'S SEASONAL & LTO RELEASES WITH A FUTURE FOCUS

Sweet browns and pumpkin spice, falling leaf cookies and pumpkin pie hummus. This year, a number of brands stepped up their autumnal seasonal and LTO offerings. "Seasonal brands and limited-edition food and beverage products can be a winning strategy for CPG companies. Consumers tend to appreciate exclusive items designed just for a special holiday so they can celebrate with well-known legacy brands," says Food Dive. From pecan pie M&Ms to turducken feast chips, many launches this season were fun and festive. Let's take a look at this fall's top seasonal flavors, best-selling products, attention-grabbing launches – and we'll stack pumpkin spice and maple flavor up head-to-head.

TOP FLAVORS IN Seasonal Products



Looking at the list of the top flavors in fall's seasonal products is enough to give someone a toothache. Pumpkin spice takes the lead in North American launches while good old chocolate flavor takes the stop spot globally.

There is a real feeling of nostalgia around fall triggered by its sights, sounds, scents and flavors."

-Elizabeth Ward, Boar's Head

TOP FLAVORS IN SEASONAL PRODUCTS: North America, Fall 2019

- | | |
|------------------|---------------|
| ■ Pumpkin Spice | ■ Maple |
| ■ Carmel | ■ Strawberry |
| ■ Pumpkin | ■ Peppermint |
| ■ Sugar | ■ Pumpkin Pie |
| ■ Sugar Frosting | ■ Apple |
| ■ Chocolate | ■ Marshmallow |
| ■ Candy Corn | ■ Berry |

TOP FLAVORS BY NUMBER OF RELEASES: Global, Fall 2019

- | | |
|-----------------|----------------|
| ■ Chocolate | ■ Almond |
| ■ Strawberry | ■ Gingerbread |
| ■ Fruit | ■ Vanilla |
| ■ Orange | ■ Hazelnut |
| ■ Caramel | ■ Lemon |
| ■ Apple | ■ Sweet Potato |
| ■ Pumpkin Spice | ■ Grape |

TOP SELLERS IN SEASONAL

The top-selling seasonal and LTO products are those legacy products that took a risk on a new, creative variety. These brands leveraged their consumer trust to try something just a little different. The top sellers show that innovation can win the day when it feels exclusive, experiential and festive.



TOP SEASONAL SELLERS-IRIS

- Mtn Dew Mystery Flavor Soda
- Oreo Maple Creme Sandwich Cookies
- Nestle Starbucks Pumpkin Spice Creamer
- Sprite Winter Spiced Cranberry Lemon-Lime Flavored Soda
- Nestle Fall'n Leaves Chocolate Chip Cookie Dough with Colorful Leaf Sprinkles
- Kit Kat Pumpkin Pie Miniatures
- Kellogg's Pumpkin Spice Wholegrain Cereal
- M&M Ghoul's Mix Caramel Chocolate Candies
- International Delight French Toast Swirl Coffee Creamer
- M&M Creepy Cocoa Crisp Chocolate Candies
- Ritz Jalapeno Cheddar Flavored Potato and Wheat Chips
- Ritz Buffalo Flavored Potato and Wheat Chips
- Coffeemate Red Velvet Coffee Creamer
- Skittles Zombie Bite Size Candies
- Sabra Salsa Verde Hummus
- Rice Krispies Pumpkin Pie Rice Krispie Treats
- Nestle Pumpkin Spice Flavored Filled Baking Truffles



“Launching new flavors to refresh legacy brands is a tactic used by a variety of different Big Food companies... [They] have transformed signature products with more adventurous flavors to bring in Millennial shoppers.”

- FOOD DIVE



RUNNING WILD (Turkey)

It might be the propensity of offerings in the fall – or just a burst of creativity – but some brands really pushed the “new and different” to new levels in Fall 2019. Some were nostalgic, some were out there – and all got attention.



TURDUCKEN FRIENDSGIVING FEAST PRINGLES

One novel LTO to sell out in mere hours was the Pringles Turducken Friendsgiving Feast. The kit included chips in flavors of turkey, duck, chicken – and all the fixins’ (cranberry sauce, stuffing & pumpkin pie.) The \$16 kit of chips not only sold out, it crashed the Pringles site. Ebay listings for the kit started around \$100 in the week before Thanksgiving.

Image Credit: Kelloggs.com



PUMPKIN SPICE SPAM

Two years after the idea was floated as a hoax, this fall saw the release of Pumpkin Spice-flavored SPAM. The product sold out in less than seven hours. It was available on spam.com and Walmart.com and the sites were cleared out almost immediately. The flavor was described as a seasonal blend of cinnamon, clove, allspice and nutmeg with subtle sweetness.

Image Credit: Spam.com



PUMPKIN PIE HUMMUS

Two brands released pumpkin pie-flavored dessert hummus this fall season. Delighted By Dessert and Boar's Head both attempted to capitalize on seasonal interest, and they got it – with sites like delish and VegNews alerting shoppers to the new innovations on the shelf.

Image Credit: Instacart.com

ON-PACKAGE: ANNOUNCING AUTUMN

It's a practice we touched on in our [summer report](#): It's the idea of seasonal products as an "experience" rather than sticking with one flavor over another. Including the word "fall" or "autumn" in the product name or positioning is a way for product developers to promote the experience of the season – while also allowing greater flexibility and creativity when it comes to flavor choice. Several seasonal products used this approach this year, including one of the IRIS best sellers (Nestle Fall'n Leaves Cookie Dough).



PRODUCTS OF NOTE



Trader Joe's Light Roast Autumn Maple Ground Coffee is coffee infused with natural flavors and other flavors for a "crisp, fall morning". It's described as an aromatic, autumnal blend of maple-flavored coffee. (USA)

Consumer Sentiment: 37% of shoppers polled said they likely or definitely would buy this product.



KitKat Autumn Sweet Potato Chocolate Bars This product features a sweet potato flavouring and comprises a sweet potato flavoured white chocolate coating and wafers with a sweet potato powder filling. (Japan)



Chobani Flip Autumn Harvest Crisp Low-Fat Greek Yogurt is a limited batch product with pumpkin-spice flavored yogurt and pecans, cranberries and gingersnap crust. (USA)

Consumer Sentiment: 47% of shoppers said they likely or definitely would buy this product.



MAPLE VERSUS PUMPKIN

Pumpkin Spice flavor was as pervasive (and divisive) as ever this fall. Let's see how the other big fall flavor (maple) stacks up against the all-powerful pumpkin.

SOCIAL POSTS

"Maple flavor" seems to be universally liked by those who post about it, with 97% positive sentiment. There are about 9 mentions of maple flavor per hour, with 15,000 posts between September and late November.

"Pumpkin Spice" is more divisive, with only 78% positivity, meaning nearly a quarter of people posting about the taste don't like it very much at all. However, its visibility is huge compared to maple, with 1.2 mentions per second and 8 million posts between September and late November.

PRODUCT PERCEPTION

When it comes to purchase intent & consumer sentiment, maple wins in the initial "I would buy this" question, and is viewed as more **natural** and **unique** than pumpkin-infused products.

Pumpkin and pumpkin spice-flavored seasonal products **significantly underperformed** against maple-flavor seasonal products in the number of people who said they would try it, before they saw any prices: **45% (pumpkin)** to **50% (maple)**.

Compared to maple-flavored seasonal products, pumpkin & pumpkin-spice flavored seasonal products received a rating that was 2.1 percentage points higher for the attribute **Premium**, followed by **Convenient** with a difference of 1.4 percentage points. In comparison maple outperformed pumpkin on being seen as **Natural** (by 5.6 percentage points) and **Unique** (by 4.3 percentage points).



THE TAKEAWAYS

There's something to be said for creativity. The seasonal and LTO launches that won the day (well, the season) were brands that leveraged existing consumer trust into opportunity. Some brands chose to capture an autumnal experience in their product names and their flavor choice – allowing greater freedom for creative formulation and labeling. Other brands went all-out on novelty, such as pumpkin pie SPAM and turducken Pringles. What if you don't have room for out-there development? Well, we stacked maple and pumpkin pie head to head and saw that while pumpkin and pumpkin spice flavor is seen as more premium – maple won out in both initial consumer reaction and in the perception of natural and unique. The question then becomes – which attribute does your consumer value more? Where is your product's opportunity to capture seasonal spending?



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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.

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