



BEYOND THE SEASON

A LOOK BACK AT SUMMER'S SEASONAL & LTO RELEASES, WITH A FUTURE FOCUS

The aroma of s'mores, the sour bite of lemon and the juiciness of watermelon. There's nothing like the tastes of summer. As we look at the limited-time releases and seasonal offerings of the past few months, we're spotting indulgence at every turn and more than a few surprises. Let's see how cherry and coconut stack up against each other; check out the best sellers and growing flavors – and explore why simply saying "summer," has some powerful potential.

TOP FLAVORS IN Seasonal & LTO Products



Fruity fun, marshmallows and all the berries you can handle. It's no surprise that the seasonal and LTO launches of summer conjure up tropical tastes and indulgent feels. Here's a look at the top flavors, both by growth and number of appearances.

TOP FLAVORS BY NUMBER OF RELEASES: Globally, Summer 2019

- | | |
|-------------|--------------|
| ■ Lemon | ■ Chocolate |
| ■ Mango | ■ Watermelon |
| ■ Pineapple | ■ Strawberry |

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

- | | |
|-----------|-------------|
| ■ S'mores | ■ Berry |
| ■ Coconut | ■ Lemon |
| ■ Lime | ■ Raspberry |

GLOBAL FASTEST GROWING FLAVORS

Seasonal Products, Q2 2018 vs Q2 2019

1. Egg Liqueur +700%
2. Chili Pepper (Jalapeno) +600%
3. Cola +466%
4. Tiramisu +400%
5. Citrus +300%

NORTH AMERICA FASTEST GROWING FLAVORS

Seasonal Products, Q2 2018 vs Q2 2019

1. Watermelon +600%
2. Lemon +250%
3. Bourbon Vanilla +200%
4. Cherry +200%
5. Spicy +300%



TOP SELLERS IN SEASONAL

Bakery and Snacks are the top categories for seasonal product launches this summer, followed by alcoholic beverages & hot beverages. Prepared foods and sauces/dressings are further down the list, but making ground. This gap leaves opportunity for players in those categories to release an attention-getter in the seasonal space. The top sellers for this summer's seasonal portfolio heavily lean toward the indulgent, with s'mores, birthday cake, and various berry & tropical varieties capturing an audience. One stand-out? Mountain Dew's Liberty Brew included 50 different flavor varieties – and was a big hit this year.



TOP 15 SEASONAL SELLERS-IRIS

- Oreo Marshmallow Moon Creme Cookies
- Oreo Mint Chocolate Chip Cookies
- Mountain Dew Liberty Brew
- Dr Pepper Dark Berry
- Hostess 100th Birthday Cupcakes
- Little Bites Mini Chocolate Chip Soft Baked Cookies
- International Delight S'mores Coffee Creamer
- Nestle Disney Mickey Light Ice Cream
- Halo Top Strawberry Cheesecake Light Ice Cream
- Krispy Kreme Lemon Glazed Blueberry Mini Crullers
- Froot Loops Birthday Cake Cereal
- Ready Pac Tropical Mango Salad with Mango Cilantro Vinaigrette
- Tate's Bake Shop S'mores Cookies
- Tate's Bake Shop Coconut Blondie Cookies
- Cape Cod Summer Potato Chips



“Holidays and changing seasons are typically when companies launch limited edition products. Although winter tends to be most successful for brands, summer – starting after Memorial Day and with a midpoint of July 4 – could prove to be a good time for Liberty Brew, with its patriotic name and label, to hit shelves.”

- FOOD DIVE





COCONUT & CHERRY – Rising Stars of Summer

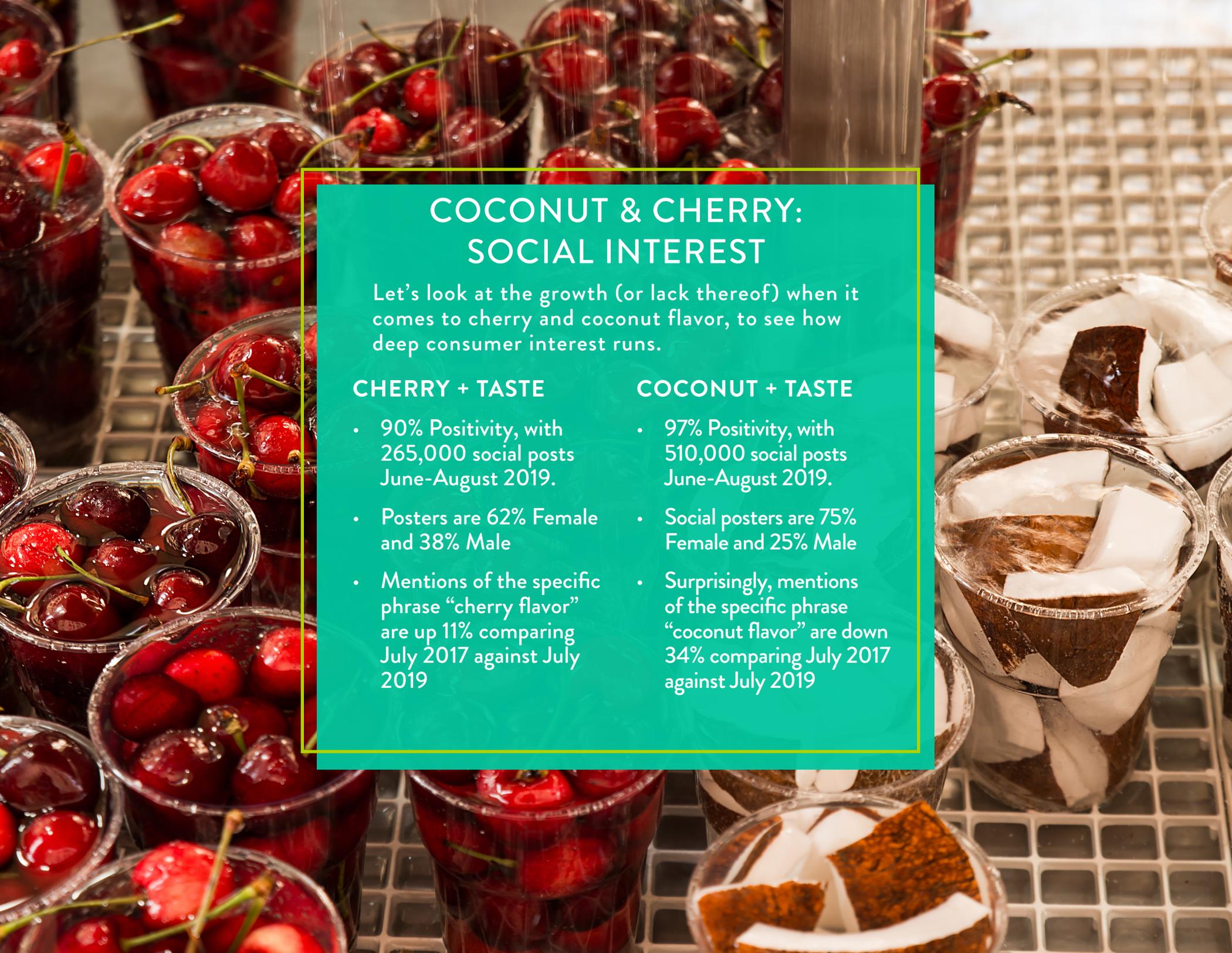


In terms of new seasonal product launches in North America, use of coconut flavor and cherry flavor saw 500% and 333% growth YTD, respectively. Cherry in fact is one of the fastest growing flavors in seasonal products, with 200% growth comparing Q2 2018 versus Q2 2019 alone. Tate's Bake Shop saw success with a coconut variety – the brand's Coconut Blondie cookies were one of the top seasonal IRIS sellers of summer. Coconut and cherry can help move products from the shelf, but what else is behind consumer interest?

CONSUMER PERCEPTION

Drilling into consumer purchase intent, it seems each flavor is well liked, but there are some gaps in perception when you stack them against each other. Compared to Cherry, Coconut received a rating that was 10.7% higher for the attribute **Natural**, followed by **Unique** with a difference of 9.3%. In comparison, Cherry outperformed Coconut on being seen as **Good Value** (by 6.9 percentage points) and **Fun** (by 6.7 percentage points).





COCONUT & CHERRY: SOCIAL INTEREST

Let's look at the growth (or lack thereof) when it comes to cherry and coconut flavor, to see how deep consumer interest runs.

CHERRY + TASTE

- 90% Positivity, with 265,000 social posts June-August 2019.
- Posters are 62% Female and 38% Male
- Mentions of the specific phrase "cherry flavor" are up 11% comparing July 2017 against July 2019

COCONUT + TASTE

- 97% Positivity, with 510,000 social posts June-August 2019.
- Social posters are 75% Female and 25% Male
- Surprisingly, mentions of the specific phrase "coconut flavor" are down 34% comparing July 2017 against July 2019

SAY IT: SUMMER

Summer has a its own feeling. Perhaps taking a page out of the Leinenkugel’s Summer Shandy playbook, some creative product launches didn’t just go the “tropical” or “campfire” route to conjure that experience. These products called out summer on their marketing specifically. In fact, 73 launches featured summer-specific positioning, including Cape Cod Summer Potato Chips – an IRIS Best Seller this year.

GLOBAL PRODUCTS OF NOTE

THE SUMMER EDITION RED BULL BEACH BREEZE ENERGY DRINK



NOSH & CO MIGHT MIXERS SUMMER SPLASH MIX



EASY RIDER SUMMER SEASONAL ESPRESSO COFFEE BEANS



EVERLASTING SUMMER COLD PRESSED JUICE



WILLIAMS SONOMA SUMMER IN A CUP PEACH COCKTAIL MIX



CAPE COD SUMMER POTATO CHIPS



SUMMER ROMANCE GODIVA GIFT BOX CHOCOLATE



ACTIVIA SUMMER EDITION WITH DRAGON FRUIT & GUAVA



THE TAKEAWAYS

This summer's seasonal & LTO launches lean toward the indulgent and fruity – and so too do the best sellers. While cherry and coconut are pulling ahead, consumers love those tastes for different reasons and they are not one in the same. Remember also summer is beloved for its variety of tastes. Launches and best sellers also featured s'mores, citrus, berry and even a 50-flavor variety in Mountain Dew's Liberty Brew. There's opportunity to be had in summer seasonal launches. Product developers may be wise to launch a product in an unexpected category (after all, snacks, bakery & beverage can't have all the fun.) There's always the option of simply calling out the essence of summer on-label and in positioning, that may allow for the flexibility to define summer as you see (or taste) it.

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
- GNPD
- Purchase Intelligence
- Food Dive
- Infegy

