



SEASONAL FLAVORS

Trends of Fall

Pumpkin spice coffee creamer to Halloween-themed burger patties and turkey and stuffing sandwiches. This year's fall seasonal and limited-edition launches brought the fun and festivity in a time where consumers are recommended to celebrate the holidays at home. Luckily, many brands stepped up to the plate to innovate and develop new launches that will entice consumers near and far. From fall flavor classics to the new and creative, let's take a look at this fall's top seasonal flavors and best-selling launches and see where you might find opportunity for your brand.



FALL FLAVOR FAVORITES

We took a deep dive into this season's top flavors and spotted many classics and a few unexpected twists. Below are this season's top flavors in seasonal and limited edition launches.

TOP FLAVORS IN SEASONAL/LTO PRODUCTS: North America, Fall 2020

- | | |
|---------------------------------|-----------------------|
| ■ Strawberry | ■ Sprinkles |
| ■ Cookies & Cream | ■ Grape |
| ■ Pumpkin/ Squash & Spice/Spicy | ■ Blue Raspberry |
| ■ Chocolate | ■ Orange/Sweet Orange |
| ■ Berry | ■ Banana |

TOP FLAVORS BY NUMBER OF RELEASES: Global, Fall 2020

- | | |
|-----------------|------------------|
| ■ Strawberry | ■ Beef |
| ■ Chocolate | ■ Peach |
| ■ Peanut Butter | ■ Pepperoni |
| ■ Berry | ■ Hot |
| ■ Smoke | ■ Blue Raspberry |

TOP SELLERS IN SEASONAL

Fall's top seasonal sellers catered to Halloween celebration treats and classic warm and comforting flavors we all know and love. From pumpkin spice to marshmallow creme and maple pecan, the notes of the autumn season are fully present in this seasons' top sellers.



TOP SEASONAL SELLERS-IRIS

- Reese's Franken-Cup Peanut Butter Cups
- Witch's Brew Crisp Wafers in Marshmallow Flavored Creme
- Vampire Milk Chocolate Filled with Strawberry Flavored Creme
- Chocolate Cake Mix with Colored Bits
- Krispy Kreme Strawberry Doughnut Bites
- Cheez It Barbeque Flavored Cheesy Baked Snacks
- Chobani Pumpkin Spice Coffee Creamer
- Cap'n Crunch's Crunch Berries Popcorn Mix
- Maple Pecan Flavored Ground Coffee
- Apple Jacks Caramel Flavored Cereal
- Oreo Winter Treats Gingerbread Cookies
- Fireball Non Alcoholic Cinnamon Flavored Holiday Nog
- Eggo Pumpkin Pie Pancakes
- Apple Pie Irish Cream Liqueur



"Our insights show that consumers hungrily anticipate the arrival of signature seasonal flavors and they look to limited-time-only treats to greet them like long-lost friends."

**- ADAM LISOOK, DIRECTOR OF BRAND MARKETING, HOSTESS BRANDS;
FOOD BUSINESS NEWS**



CONSUMERS WANT COMFORT

It's not a surprise that pumpkin spice is on the top of the flavor list for fall. But other savory flavors like beef and cheese are finding popularity as well. As consumers spent time at home for the fall season, they searched for flavors that bring feelings of comfort and nostalgia. In fact, Yelp notes suadero tacos, an authentic Mexican street food featuring a specific cut of shredded, fatty beef, as having a search increase of 6,218% over the past year.



90% of consumers say they find food and beverage products with seasonal flavors comforting and nostalgic.

- FONIA INTERNATIONAL NATIONWIDE SURVEY

MENU MENTION



Quiznos Winter Turkey Feast (WTF) Sub is served with oven-roasted turkey, cheese, lettuce and tomato topped with Craisins and honey French dressing on a rosemary parmesan bread. The sub offering is a limited time offering that was available to US restaurants starting November 3, 2020.



"2020 has leapt from one chaotic moment to another, but it is in these times that we most crave nostalgic flavor combinations and meaty, cheesy comfort food."

- MIKE GIESEMAN, DIRECTOR OF CULINARY AND INNOVATION FOR REGO RESTAURANT GROUP, OWNER OF QUIZNOS;
FOOD BUSINESS NEWS



HALLOWEEN SELLERS

Though trick or treating looked much different this year due to the pandemic, many consumers and brands found alternative ways to celebrate. Confectionery manufacturers innovated ways to make Halloween memorable with new product introductions. Other brands, like Lowe's for example, offered drive-through and curbside trick-or-treating, offering children candy and a small pumpkin free of charge to take home.

“Cookies, baking mixes and ice cream are among the numerous new products featuring flavors inspired by the fall season. Pumpkin spice dominates the limited-time launches, and maple and apple offerings are cropping up, too.”
- FOOD BUSINESS NEWS

PRODUCTS OF NOTE



M&M'S HAUNTED SUGAR COOKIE KIT is described as a sugar cookie mix including pink, yellow and blue colored powder, candy eyes and M&M's milk chocolate candies.

45% of consumers responded that they likely or definitely would buy this product.



HALLOWEEN STRAWBERRY FLAVOR GUMMY EYEBALL CUPCAKE TOPPER is made with artificial fruit flavors and colors and contains eight pieces.

23% of consumers responded that they likely or definitely would buy this product.



PILLSBURY CHOCOLATE CAKE MIX WITH COLORED BITS was added to the range for Halloween 2020. The funfetti mix features colored bits in the mix.

42% of consumers responded that they likely or definitely would buy this product.

HOME FOR THE HOLIDAYS

Holiday gathering restrictions changed the Thanksgiving holiday for many. With many more consumers hosting and cooking, CPG manufacturers created ways to create a tasty meal. And as restrictions will likely persist into Christmas season, opportunity for manufacturers will continue to exist in this space. According to Food Dive, one study by Campbell Soup dove into some of consumers' thoughts this holiday season.

- **65%** of consumers said they would celebrate Thanksgiving in their own home with 1 in 5 being first time hosts
- **37%** felt "fairly" or "extremely" nervous about cooking for the holidays
- **66%** were worried about an "epic cooking fail"



PRODUCTS OF NOTE



WAITROSE & PARTNERS TURKEY, STUFFING & BACON SANDWICH is made with British turkey breast and pork with chesnut stuffing, cranberry and redcurrant chutney, turkey stock mayo and smoked bacon on seeded bread. | UK



LEATHERWOOD HONEY WITH RED GUM SMOKE GLAZED HAM is a cooked and ready to eat product featuring wood smoked meat from Australia. It is gluten free and free of artificial color. | Australia



WILLIAMS-SONOMA CRANBERRY & WILD RICE STARTER MIX includes a combination of ruby-red cranberries and hearty whole grains with wild rice and quinoa. | USA



SERRANO HALLOWEEN CHICKEN BURGER features roasted pumpkin and pumpkin seeds available for Halloween 2020. The product is gluten-free and comes with two burgers. | Spain

THE TAKEAWAYS

Fall's favorite flavors reined tried and true this year as consumers searched for comfort and nostalgia. Though warm flavor profiles of pumpkin spice, caramel, and maple remained a consumer favorite, we also spotted savory product introductions including beef and cheese that satisfied consumers search for comfort. And as stay-at-home celebrations led to a greater increase in the number of holiday hosts this Thanksgiving, it provided great opportunity for retail brands to innovate on new, convenient and of course, tasty ways to celebrate the fall holidays.



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
- Food Business News
- QSR Magazine
- Food Dive
- Mintel GNPD
- FONA International Nationwide Survey
- Quiznos

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