



SEASONAL FLAVORS

Trends of Fall

Filled with notes of comfort and coziness, warmth and a time for gathering with family and friends, the fall season is one of the most anticipated for seasonal and LTO products from CPG brands and foodservice alike. In fact, a recent report shows that 69% of consumers say the fall season has the best seasonal flavors. Product developers are innovating to excite their consumers with unique twists on seasonal favorites and new additions to anticipated fall lineups. From a Turkey Talk Line on TikTok to prepare for your holiday feast to churro flavored liquor and pumpkin spice flavored Cup of Noodles, let's take a look at the trending seasonal products and flavors for fall, and see where you can find inspiration for your brand.

FALL'S TOP FLAVORS IN: SEASONAL & LTO's

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 BY NUMBER OF RELEASES: North America, Fall Seasonal & LTO 2021

- | | |
|---|-----------------------------|
| ■ Pumpkin/Squash & Spice/Spicy | ■ Caramel/Caramelized |
| ■ Nonpareils/Sprinkles/Hundreds & Thousands | ■ Pumpkin Squash |
| ■ Sugar | ■ Peppermint |
| ■ Sugar (Icing/Frost/Glaze/Fondant) | ■ Pumpkin Pie |
| ■ Chocolate | ■ Cream/Crème/Whipped Cream |



FASTEST GROWING FLAVORS Globally, Fall Seasonal & LTO Q3 2020 VS. Q3 2021

- | |
|-------------------------------|
| ■ Nougat/Turron +600% |
| ■ Mung/Moong Bean +600% |
| ■ Paprika/Sweet Paprika +500% |
| ■ Honey +450% |
| ■ Bean +400% |

FASTEST GROWING FLAVORS North America, Fall Seasonal & LTO Q3 2020 VS. Q3 2021

- | |
|---|
| ■ Marshmallow +300% |
| ■ Chocolate +300% |
| ■ Sugar (Icing/Frost/Glaze/Fondant) +200% |
| ■ Maple/Maple (Syrup) +200% |
| ■ Roasted/Toasted +200% |

“This year, the anticipation and excitement for autumn started building early. In July 2021, “can’t wait for fall” Tweets increased by 112% compared to June.”

– SPROUT SOCIAL

”

TOP SELLERS IN SEASONAL & LTO

From indulgent confectionery to spicy snacks and fall inspired beverages, popular seasonal sellers and limited-time offerings varied cross-category. It's no surprise that pumpkin spice made it's appearance known this season, but innovation in flavor is abundant in all food and beverage categories. Cozy up and let's take a look at the top sellers and categories in this space.



TOP SEASONAL SELLERS-IRIS

- Gingerbread Snap'd Dew
- Doritos Ultimate Cheddar Flavored Tortilla Chips
- Taylor Farms Maple Dijon Crunch Chopped Kit
- Famous Dave's Spice Corn Bread
- Annie's Carmel Apple Bunny Grahams
- Haribo Scaremix Gummy Candy
- Chameleon Cold-Brew Organic Cinnamon Vanilla Coffee Concentrate
- McCafe Toffee Almond Flavored Coffee K-Cup Pods
- Oreo Apple Cider Donut Flavored Sandwich Cookies
- Chips Ahoy Hershey's Fudge Filled Soft Cookies
- Lily's Pumpkin Spice Flavor White Chocolate Style Baking Chips
- Duncan Hines Epic Chocolate Chip Caramel Cookie Kit
- Nestle Coffee Mate Natural Bliss Pumpkin Spice Oat Milk Creamer
- Goldfish Jalapeno Popper Flavoured Baked Snack Crackers

TOP CATEGORIES



BAKERY



CHOCOLATE
CONFECTIONERY



SUGAR & GUM
CONFECTIONERY



SNACKS



ALCOHOLIC
BEVERAGES



HOT
BEVERAGES

A CONSUMER LOOK AT FALL



“Fall is more than flavors, it’s a feeling. Sweater weather, apple picking, spooky season, football, festive family time—the fall encapsulates a lot of moments that have warm, nostalgic associations. The brands that successfully inject that into their seasonal marketing campaigns stand to make a positive impact.”

- SPROUT SOCIAL



Thanksgiving sticks out as a season to try new foods and flavors for nearly half (47%) of consumers.

- DATASSENTIAL



26% OF U.S. ADULTS

strongly agree that they enjoy holiday traditions from their favorite brands (eg, McDonalds’ shamrock shakes, Starbucks’ red holiday cups) - Mintel

69% OF CONSUMERS

say fall has the best seasonal flavors – Honey Baked Ham Company, One Poll

NEARLY 50% OF AMERICANS

think fall flavors like pumpkin spice should be available all year – Yahoo! News

HOLIDAY INSPIRED TREATS

From spooky Halloween treats to thanksgiving products for your holiday feasts, the fall season brought lots of holiday inspired offerings. And as consumers look forward to these holiday offerings from their favorite brands, there is plenty of opportunity in this space for food and beverage developers to innovate.

BUTTERBALL TURKEY TALK LINE

.....
started in 1981 as a way for turkey experts to guide home cooks through making a Thanksgiving Turkey.

Today, talk-line experts will expand to social media to meet consumers where they are and showcase their expertise with a new generation.

.....
83% of respondents in a Butterball survey said social media is a great place to get menu inspiration or recipes for Thanksgiving.



PRODUCTS OF NOTE



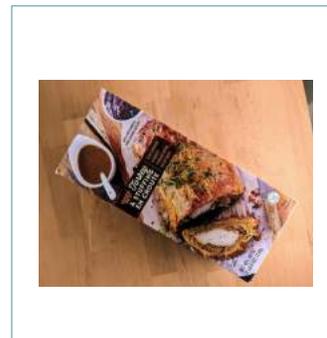
DISNEY HOCUS POCUS AMUCK! AMUCK! CUPCAKE KIT was released for Halloween 2021. The product contains vanilla cupcake mix, light green frosting, soft crunch pearl sprinkles, black cupcake liners and printed cupcake topper.

43% of consumers responded that they likely or definitely would buy this product.



NESTLÉ TOLL HOUSE TRICK-OR-TREATS FUDGE COOKIE DOUGH WITH HALLOWEEN SPRINKLES was released for Halloween 2021. The product is free from preservatives, artificial flavors and colors, and yields 20 cookies.

54% of consumers responded that they likely or definitely would buy this product.



TRADER JOE'S TURKEY & STUFFING EN CROUTE is a seasonal product that features a turkey tenderloin wrapped in cornbread stuffing and puff pastry. The product should be thawed 24 hours before cooking and serves eight people.

Source: Brand Eating

SEASONAL & LIMITED-EDITION SNACKING

Seasonal and limited-edition snacks found their way onto top sellers this fall, ranging in flavors from the classic pumpkin spice to sweet potato, ultimate cheddar and more. And according to a Mintel report, 26% of U.S. consumers tend to choose flavors that fit the season, providing opportunity for food and beverage developers looking to innovate in the seasonal and LTO space.

PRODUCTS OF NOTE



PUMPKIN SPICE FLAVORED CUP OF NOODLES were released in October at select Walmart locations. The pumpkin spice flavored offering provided a shock factor for consumers and piqued interest on social media.

Source: SproutSocial



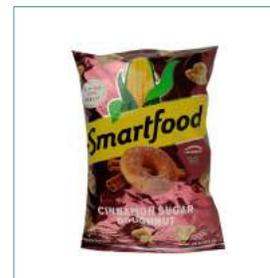
DORITOS ULTIMATE CHEDDAR FLAVORED TORTILLA CHIPS are now available for a limited-time only. The product claims to take crunch and cheese to another level.

69% of consumers responded that they likely or definitely would buy this product.



GOOD & GATHER SWEET POTATO HUMMUS is a limited-edition product made with chickpeas, roasted sweet potatoes, pumpkin seeds and spices.

38% of consumers responded that they likely or definitely would buy this product



SMARTFOOD CINNAMON SUGAR DOUGHNUT POPCORN is now available as a limited-time flavor. The air-popped popcorn contains no artificial flavors or preservatives and 15g wholegrains per serving.

41% of consumers responded that they likely or definitely would buy this product.



26% of U.S. consumers tend to choose flavors that fit the season

FALL INSPIRED BEVERAGES

Each year, consumers await seasonal offerings for warm fall beverages especially from favorite coffee chains such as Starbucks, Dunkin and more. pumpkin spice is still a reigning favorite, but apple crisp, cinnamon crunch are all gaining ground and the coffee space isn't the only segment featuring fall flavors. Sparkling waters and alcoholic beverages alike have entered the seasonal and LTO space.



"Seasonal fall drinks mark the unofficial start of fall, despite the fact that they're ushered in while summer heat prevails. At the heart of the drinks is a sense of comfort and indulgence, and as the pandemic continues to disrupt lifestyles there's more desire for comforting sensory experiences than ever."

- SPROUT SOCIAL



PRODUCTS OF NOTE



BUD LIGHT FALL FLANNEL SELTZER LIMITED-EDITION VARIETY PACK includes the following flavors: Apple Crisp; Maple Pear; Pumpkin Spice; and Toasted Marshmallow for Fall 2021.

32% of consumers responded that they likely or definitely would buy this product.



BAILEYS SAVOR A CHURROS joins the famous Irish whiskey cream brand and the iconic Mexico City Churrería El Moro to introduce a limited-edition churro-flavored Irish cream for desserts and spirits.

Photo Source : Walmart



PERRIER MYSTÈRE POTION BLACKBERRY FLAVORED CARBONATED MINERAL WATER is a limited-edition pack for Halloween 2021. It is free from juice, sweeteners and calories.

30% of consumers responded that they likely or definitely would buy this product.



STARBUCKS NON-DAIRY PUMPKIN SPICE ALMOND MILK & OATMILK CREAMER is a blend of almondmilk and oatmilk with flavors of pumpkin, cinnamon and nutmeg.

40% of consumers responded that they likely or definitely would buy this product.

THE TAKEAWAYS

For consumers, fall isn't just a season – it's a time for gathering with family and friends, indulging in festive product offerings, giving thanks and celebrating. This season featured holiday-themed introductions and innovative fall releases, both in flavor and format. Innovation in seasonal products and LTOs featured exciting flavors from cinnamon sugar to ultimate cheddar, apple crisp and more. And consumers are interested in these seasonal flavors, with 48% saying they believe they should be enjoyed year-round. Many of these flavors will inspire innovation for the upcoming months as we lead into the winter season, so the question is, how can these innovations inspire your winter product developments and beyond?



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
- Mintel
- Yahoo! News
- Food Business News
- Sprout Social
- Walmart
- Honey Baked Ham
- Company
- One Poll
- Datassential
- Brand Eating
- Butterball
- Food & Wine

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