



PUMPKIN SPICE

2023 • FLAVOR INSIGHT REPORT

OVERVIEW

A traditional and tried and true flavor of fall, pumpkin spice is the perfect combination of warm brown spices including cinnamon, nutmeg, ginger, and cloves. Traditionally used for pumpkin pie and bakery items alike and the infamous pumpkin spice latte—pumpkin spice has created such a consumer following that products have become available well before the actual fall season even begins. While pumpkin spice is a very well-established flavor profile in many product categories, we are seeing 40% growth in global pumpkin spice flavored products from 2021-2022. Sales of pumpkin spice products in retail totaled more than \$802 billion in the year ending July 2023, according to NielsenIQ data. Let's take a closer look at where pumpkin spice is appearing on the menu, in new products, and social media.



**40% growth in pumpkin
spice new product
introductions from
2021-2022.**

PUMPKIN SPICE

Social Listening Summary

While searching for the hashtag pumpkin spice on Instagram, there are more than 3.5 million posts from pumpkin bread, brown butter pumpkin bars, pumpkin spice cinnamon rolls, and a healthier version of pumpkin spice stuffed French toast made with pumpkin spice flavored protein powder.

- @lovevivv shared a recipe for pumpkin spice s'mores bars that include a chocolate marshmallow fluff.
- @laus_healthy_life shared a recipe for pumpkin spice cookie dough protein bars.
- @katerinafaith shared a recipe for a salted caramel pumpkin spice latte.



875

PUMPKIN SPICE
RECIPES ON
FOODNETWORK.COM

While searching Foodnetwork.com they have 875 recipes including pumpkin spice. There is an array of recipes including the ever-popular pumpkin spice latte, pumpkin spice muffins to even more unique offerings like pumpkin spice popcorn, pumpkin spice sweet potatoes, and pumpkin spice ice pops.

The Pumpkin Spice Latte Just Turned 20—The Washington Post

"Food trends come and go, but the Pumpkin Spice Latte is forever. Well, we might not be able to say that definitively just yet, but after 20 years, the now-iconic seasonal Starbucks beverage has managed to not only survive the fickle winds of the coffee market but also morph into something far greater than the sum of its parts." First introduced as the "fall harvest latte," the PSL has come a long way from when it was first debuted, and this seasonal beverage is launched earlier and earlier each year with consumers clamoring for more!



PUMPKIN SPICE

ON THE MENU 2022

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PUMPKIN SPICE
MENTIONS ON
THE MENU

Source: Datassential

- **3% growth** in pumpkin spice flavored menu items from 2021-2022.
- **Casual dining** is the top restaurant segment with 36% of all pumpkin spice flavored menu items appearing there.
- **Beverage** is the top menu section with 60% of all pumpkin spice flavored menu items.



MENU MENTIONS:

FINE DINING: Butternut Squash Arancini featuring age aioli, brown butter crumble, **pumpkin spice-candied pepitas** and topped with pecorino romano at Alma Nove in Hingham, MA.

FAST CASUAL: **Pumpkin Spice Brioche French Toast** featuring vegan brioche pullman loaf, pumpkin spice oat milk, roasted strawberry, compote, cashew whipped cream, maple syrup, and topped with powdered sugar at Café Gratitude in California.

CASUAL DINING: **Pumpkin Spiced Old Fashioned** featuring Woodford Reserve, house made pumpkin spice syrup and orange bitters on the rocks at Corner Bistro in NYC.

Consumer Awareness of Pumpkin Spice

Pumpkin spice is a seasonal favorite that consumers are familiar with and a rite of passage flavor for the fall season (even if it starts in August.) According to Datassential's Flavor Tool, pumpkin spice is in the 63rd percentile among all foods and flavors, meaning consumers love pumpkin spice more than 63% of all other items.

- **88%** know it
- **46%** love or like it
- **64%** have tried it

PUMPKIN SPICE

Global New Product Introductions

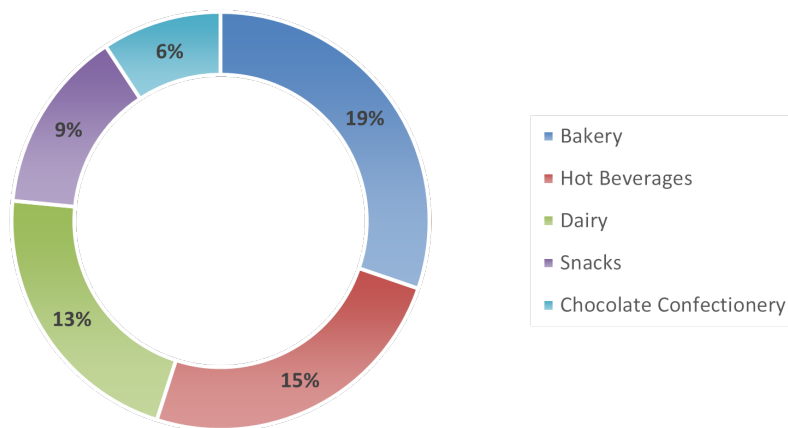
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PUMPKIN SPICE FLAVORED
NEW PRODUCT
INTRODUCTIONS

GLOBAL FAST FACTS:

- **North America** is the top global region for pumpkin spice flavored new product introductions.
- **Bakery** is the top product category globally for pumpkin spice flavored new products.
- **Coffee** is the top flavor paired with pumpkin spice

TOP PUMPKIN SPICE FLAVORED PRODUCT CATEGORIES



URBAN PLATTER PUMPKIN SPICE MILLET PANCAKE MIX: A just add water mix that contains several types of flour including sorghum, oat, sodo millet and almond. | India



OPTIMEL PEACH-PUMPKIN SPICE FLAVORED DRINKING YOGURT: This limited-edition drinking yogurt is rich in protein and is fat-free and has no-added sugar. | Netherlands



MARIBEL PUMPKIN SPICE FLAVORED PEANUT BUTTER: This limited-edition peanut butter is naturally flavored with pumpkin spice. | Italy

PUMPKIN SPICE

North America New Product Introductions

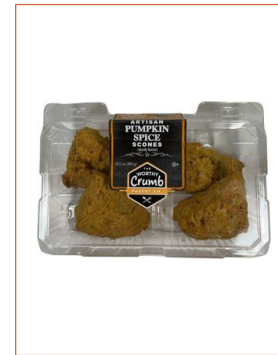
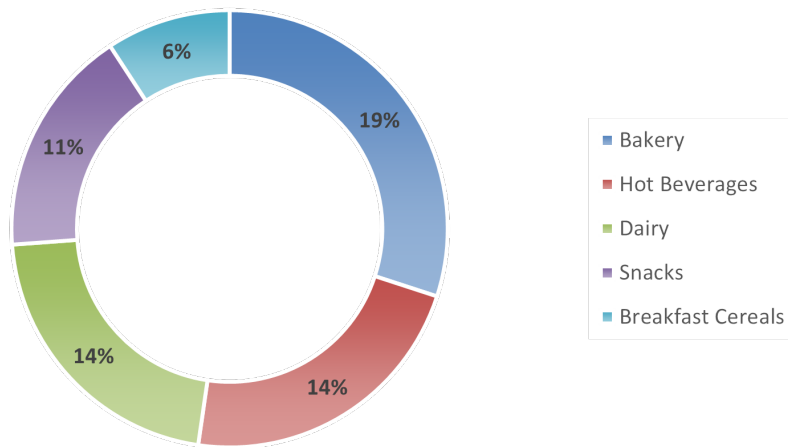
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PUMPKIN SPICE FLAVORED
NEW PRODUCT
INTRODUCTIONS

GLOBAL FAST FACTS:

- **North America** accounts for 78% of pumpkin spice flavored new product introductions.
- **Bakery** is the top product category in North America for pumpkin spice flavored new product introductions.
- **Coffee** is the top flavor paired with pumpkin spice

TOP PUMPKIN SPICE FLAVORED PRODUCT CATEGORIES



WORTHY CRUMB PASTRY CO. ARTISAN PUMPKIN SPICE SCONES: This product is described as delicious, light and moist baked scones, made with pumpkin puree and finished with a caramel drizzle and crystal sugar.

41% of consumers responded that they likely or definitely would buy this product, outperforming its subcategory. | USA



SANDERS SMALL BATCH WONDERS PUMPKIN SPICE MILK CHOCOLATE SEA SALT CARMELS: Described as one-of-a-kind small-batch caramels made with real cream and butter.

49% of consumers responded that they likely or definitely would buy this product, outperforming its subcategory. | USA



WILLIAMS SONOMA PREMIUM COFFEE COLLECTION PUMPKIN SPICE GROUND COFFEE: This product is described as a barista-worthy brew featuring expertly roasted blends of the world's finest coffee beans.

28% of consumers responded that they likely or definitely would buy this product, outperforming its subcategory. | USA

THE TAKEAWAYS

A delicious taste of fall, pumpkin spice is expanding beyond beverages in new products including yogurt, confectionary products, and even flavored peanut butter. Pumpkin spice is showing growth in new products and on restaurant menus with casual dining as the key restaurant segment with 36% of all pumpkin spice flavored menu items appearing there. On the menu, beverage is the top menu section with 60% of all pumpkin spice flavored menu items appearing on the beverage menu. With its warm and nostalgic flavor profile, pumpkin spice is a favorite fall flavor for consumers. The question is—is pumpkin spice on your Flavor Radar?



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SOURCES:

Mintel GNPD

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