**SEASONAL FLAVOR LOOKBACK: TRENDS OF FALL**

Spanning from September to late December, the fall season is filled with cozy indulgent flavors and savory holiday dishes consumers look forward to each year. Each fall, consumers await innovative seasonal and limited-edition products that feature exciting new flavors, formats and collaborations. While sweet treats in bakery, chocolate confectionery, and snacks dominated this season, product developers can find opportunity in the seasonal and LTO space cross-category.

From fall’s flavorful impact on the social media space, to holiday favorites and of course, pumpkin spice, let’s take a look back at the trending seasonal products and flavors for fall, and see where you can find inspiration for your brand.

~ 25% OF CONSUMERS said that limited edition flavors have an influence on their choices.

- INNOVA

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**TOP FLAVORS IN SEASONAL/LTO PRODUCTS:**

**North America Introductions, Sept. 2023 - Dec. 2023**

- Chocolate
- Peppermint
- Pumpkin/Squash & Spice/Spicy
- Gingerbread
- Caramel/Caramelised
- Candy Cane
- Caramel (Salted)
- Raspberry
- Cherry
- Biscuit/Cookie

**TOP FLAVORS IN SEASONAL/LTO PRODUCTS:**

**Global Introductions, Sept. 2023 - Dec. 2023**

- Chocolate
- Gingerbread
- Hazelnut
- Strawberry
- Milk
- Fruit
- Orange/Sweet Orange
- Caramel/Caramelised
- Vanilla/Vanilla Bourbon/Madagascar
- Apple

Source: Mintel GNPD

**KEY TRENDS:**

Fall on Social
Seasonal Celebrations
Pumpkin Spice, of course!

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**NOTABLE PRODUCT INTRODUCTIONS:**

- Opopop Pumpkin Spice Flavor Wrapped Popcorn Kernels
- Opopop Grandma's Stuffing Flavor Wrapped Popcorn Kernels
- Red Bull Pear Cinnamon Energy Drink
- Member’s Mark Creamy Dill & Cheddar Puffs
- Simple Nature Pumpkin Applesauce
- Mozart Chocolate Pumpkin Spice Cream Liqueur
- Trader Joe's Cranberry Orange & Onion Crunchy Chili
- Planters Apple Cider Donut Flavored Cashews
- Cheez It Sizzlin’ Bacon Baked Snack
- Rao’s Balsamic Marinara Sauce

**FLAVORS ON THE MENU**

1,321 launched menu items & LTO’s in Fall 2023 – DATASENTIAL

- Wingstop Maple Sriracha Chicken Sandwich
- Cracker Barrel Cinnamon Roll Pie Breakfast
- Arby’s Good Burger 2 Meal
- Starbucks Chesnut Praline Frappuccino
- Red Lobster Cinnamon Whiskey Sour

**BAKERY, CHOCOLATE CONFECTIONERY & SNACKS** ranked highest for top North America categories with fall seasonal and limited-edition offerings

- MINTEL GNPD
**FALL ON SOCIAL**

With such excitement around fall flavors, it’s no surprise that fall flavors and offerings have become a popular topic on social media. In fact, #fallflavors garnered 42.1M views on TikTok and 245,508 posts on Instagram from Oct 2022 to Sept 2023 alone! Pumpkin spice and traditional favorites like caramel and apple are finding new life, while maple, pecan, cinnamon, butterscotch and pear are gaining momentum on social.

**SEASONAL CELEBRATIONS**

A time for gathering and celebration, the fall season spans multiple holidays including Thanksgiving, Diwali, Halloween and more that give inspiration for developers. Twists on classic holiday dishes and holiday inspired flavors can excite consumers with a new taste experience.

**PRODUCTS OF NOTE**

- **ALANI NU WITCH’S BREW PRE-WORKOUT** was released for Halloween 2023 and contains 200 mg caffeine. 41% of consumers responded that they likely or definitely would buy this product.

- **PILLSBURY READY TO BAKE! TURKEY SHAPE SUGAR COOKIE DOUGH** was available for Thanksgiving 2023 with 20 pre-cut cookies. 56% of consumers responded that they likely or definitely would buy this product.

**THE TAKEAWAYS**

From fall flavors trending on social, to seasonal holiday treats and pumpkin spice galore, the fall season can provide much flavor inspiration for brands in the food and beverage space. As consumers look to the new and exciting, brands can leverage twists on classic flavors and formats as well as connecting with them through intriguing collaborations and campaigns through social media.

Looking for flavor inspiration for your next seasonal or limited-edition product development? Reach out to us for more information. Let’s get started!

Sources: Pure Wow, Grubhub

**PUMPKIN SPICE, OF COURSE!**

As expected, consumers were craving pumpkin spice the moment temperatures began to drop (or even sooner — some LTOs dropped as soon as August 24th)! From the birth of the Pumpkin Spice Latte to recent creations such as the Pumpkin Spice Frosty and more, while the flavor is well known by consumers, it is still trending and being reinvented in many seasonal and limited-edition offerings spanning food and beverage categories.

**PRODUCTS OF NOTE**

- **TRADER JOE’S PUMPKIN SPICE PRETZEL SLIMS** feature thin and crisp pretzels with yogurt flavored coating topped with pumpkin spiced pumpkin seeds. The limited time offering was sold in a 6 oz. bag.

- **NESTLÉ COFFEE MATE PUMPKIN SPICE FLAVORED COFFEE CREAMER** features a sweet like pumpkin pie natural and artificial flavor. It is a non-dairy creamer free from gluten and cholesterol.

**SOURCES:**
Innova
Mintel GNPD
Datassential
Instagram: @drinkspindrift @MrPeanut

**PUMPKIN SPICE** showed +26% 12-month growth on US menus

- DATASSENTIAL