

# SEASONAL FLAVOR LOOKBACK: TRENDS OF FALL

Spanning from September to late December, the fall season is filled with indulgent and savory flavor features 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 sugar & gum confectionery dominated this season, product developers can find opportunity in the seasonal and LTO space cross-category.

From fall's fruity features to classic pumpkin spice and products and launches worth celebrating with, let's take a look at the trending seasonal products and flavors for fall, and see where you can find inspiration for your brand.



## 44% OF CONSUMERS

of consumers say they purchase fall seasonally flavored products as soon as they are available on store shelves.

- MCCORMICK SEASONAL FLAVORS SURVEY



We took a deep dive into fall's top flavors and trends and spotted many classics and some notable growing flavors. Below are fall's top flavors in seasonal and limited edition launches this year.

### TOP FLAVORS IN SEASONAL/LTO PRODUCTS: North America Introductions, Sept. 2024- Dec 2024

■ Pumpkin Spice	■ Strawberry
■ Orange/Sweet Orange	■ Sugar
■ Gingerbread	■ Grape
■ Peppermint	■ Apple (Green)
■ Sugar (Icing/Frosting/Glaze/ Fondant)	■ Peanut Butter

### GROWING FLAVORS IN SEASONAL/LTO PRODUCTS: Global Introductions, Q3 2023 vs. Q3 2024

■ Orange/Sweet Orange .....	+1100.00%
■ Sour .....	+600%
■ Nonpareils/Sprinkles.....	+400%
■ Berry .....	+400%
■ Peanut Butter .....	+300%

Sources: Mintel GNPD

## KEY TRENDS:

- Fruity Favorites
- Classic Pumpkin Spice
- Time for Celebration



### NOTABLE PRODUCT INTRODUCTIONS:

- Best Maid Pickle Beer Variety Pack
- Nerds Berry Punch Rush Gummy Clusters
- Twix Milk Chocolate Bark
- Frederik's Cinnamon Roll Pancake & Waffle Mix
- McCormick Salted Caramel Finishing Sugar
- Better Goods Apple Gingerbread Spice & Cranberry Orange Holiday Fruit Spreads
- Quest Soft & Chewy Cinnamon Brown Butter Cookie
- Wonderful Sweet Cinnamon Pistachios



### FLAVORS ON THE MENU 1,173 launched menu items & LTO's in Fall 2024 – DATASSENTIAL

- TCBY Graham Cracker Frozen Yogurt
- Chil's Autumn Breeze Margarita
- Jamba Cranberry Pomegranate Smoothie
- Denny's Turkey Feast Sandwich



## BAKERY, CHOCOLATE CONFECTIONERY, AND SUGAR & GUM CONFECTIONERY

ranked highest for top North America categories with fall seasonal and limited-edition offerings

- MINTEL GNPD

# FRUITY FAVORITES

This fall, fruity features such as orange and apple made themselves known in new product introductions. In fact, both of these flavors listed as top North America flavors for seasonal/LTO product introductions this season. We've seen these featured in both the grocery aisle and dining alike.

## 1100% GROWTH IN ORANGE/SWEET ORANGE

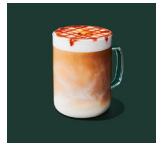
seasonal/LTO product flavor features from Q3 2023 vs Q3 2024.

- MINTEL GNPD

### PRODUCTS OF NOTE



HEALTH-ADE ORANGE CREAMSICLE KOMBUCHA is a limited edition bubbly probiotic tea that contains 7% juice.



STARBUCKS APPLE CRISP OATMILK MACCHIATO features flavors of apple, cinnamon, oats and brown sugar with Blonde Espresso Roast, creamy oatmilk and spiced-apple drizzle.

Sources: Mintel GNPD, Starbucks

# CLASSIC PUMPKIN SPICE

For many consumers, fall and pumpkin spice go hand in hand. The warm and cozy flavor ranked as the top flavor for North America seasonal/LTO product introductions this season. Though now a mainstream flavor, we continue to see innovation in this space each season with new formats and flavor combinations.

### PRODUCTS OF NOTE



CHAMELEON COLD-BREW ORGANIC HANDCRAFTED PUMPKIN SPICED PIE COFFEE SUPER CONCENTRATE is a limited-edition product that is naturally flavored with other natural flavors.



PEANUT DELIGHT PUMPKIN SPICE PEANUT BUTTER SPREAD contains 80% peanuts and is flavored with other natural flavors.



MARKET DISTRICT PUMPKIN & BROWN BUTTER RAVIOLI is egg pasta filled with a savory spice pumpkin filling.



FLIPZ PUMPKIN SPICE COVERED PRETZELS were available for Fall 2024 and features crunchy and salty pretzels coated in pumpkin spice flavoring.

Sources: Mintel GNPD

# TIME FOR CELEBRATION

A time for gathering and celebration, the fall season covers many holidays that can spur inspiration for developers. Similarly, developers can find opportunity by leaning into cultural events or popular media to inspire their innovation such as movies, social media trends and more.

## 33% OF CONSUMERS

say that the fall season excites them the most as it relates to seasonally-flavored food and beverage products.

- MCCORMICK SEASONAL FLAVORS SURVEY

### PRODUCTS OF NOTE



ORIGINAL GOURMET DAY OF THE DEAD GUMMY WORMS feature orange, cherry, pineapple, strawberry and lemon flavors.



BETTY CROCKER WICKED CUPCAKE KIT is a color changing baking kit where you mix to reveal either an enchantingly emerald or perfectly pink cupcake color.

Sources: Mintel GNPD, Walmart

# A WORD FROM OUR EXPERT

## PAMELA OSCARSON, SENIOR MANAGER - CONSUMER & MARKET INSIGHT

"The fall season is all about warm and cozy flavors. While pumpkin spice is the tried-and-true flavor of the season, there's still much room for creativity in your flavor choices. Our research shows that consumers also find high desirability in other flavors such as apple crisp, maple brown butter, pumpkin cheesecake, and sea salt caramel."



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

