

20 14 CATEGORY INSIGHT REPORT

BARS & BAKERY: A LOOK AT FRUITS AND OTHER FLAVORS

NEW FLAVORS ARE ON THE MOVE

Exploring bars and bakery products launched in North America and around the world since 2009 revealed that while there are the steady favorite flavors, it isn't new fruit flavors that are experiencing growth. Flavors and ingredients such as sweet browns, sea salt, nuts and seeds are on the move instead. Let's take a look.



BAR PRODUCTS IN NORTH AMERICA

BARS, NORTH AMERICAN LAUNCHES

JAN. 2009 - DEC. 2013

Berry and Citrus are the top fruit flavor sub-categories. The top individual fruit flavors were Strawberry, Cranberry and Blueberry. All other ingredients in the top 10 were brown and nut flavors like chocolate, caramel, peanut butter, almonds and peanuts.

Banana and Coconut are the two fruit flavors that showed interesting growth over the time period. Banana increased 325% with 17 new products in 2013 and Coconut increased 383% with 29 new products in 2013. Coconut's increase in bars is likely tied to the general rise of interest in coconut, the health halo it carries thanks to the popularity of coconut water, and consumers' desire for affordable or healthy indulgences.



Gnu Foods Fiber Love Orange Cranberry Bar

Contains 12g of fiber, which is 48% of the dairy fiber allowance, 3g of fat and six grains and seeds.



18 Rabbits Fig, Cranberry & Hazelnut Organic Granola Bar

Blended with walnuts and TCHO cacao nibs. Contains no refined sugars.



Thunderbird Energetica Sweet Lemon Rain Dance Bar

Said to offer raw energy with pure ingredients, including 7g of quinoa protein.



Evolution Pepita Almond Raisin Cranberry Bar

Made with agave syrup, sea salt and a blend of seeds, nuts and fruit.

Trends in Non-Fruit Flavors

Flavors other than fruit where we see more upward trends in bars are:

- Sea Salt +800%
- Butters +600% (sunflower, cashew, nut, almond, hemp seed)
- Vanilla +550%
- Yogurt + 450 %
- Toffee +400%
- Honey +229%

BARS, NORTH AMERICAN LAUNCHES, JAN. 2009 - DEC. 2013 (CONTINUED)



**Blueberry Acai Greek Yogurt
Coated Granola Bar**

Honey roasted granola and fruit, dipped and drizzled in Greek yogurt imported from Europe.



**KIND Healthy Grains Maple
Pumpkin Seeds with Sea Salt Bars**

The all natural bars contain five super grains including oats, millet, quinoa, amaranth and buckwheat.



**KIND Healthy Grains Vanilla
Blueberry Bars**

The product contains 22g 100% whole grains per bar, and is free from gluten and GMO.



**GoMacro Macrobar
Sunflower Butter + Chocolate
Protein Purity Bar**

Positioned as allergy friendly with no nuts, no soy, no eggs, no dairy, no GMOs, no gluten. Contains organic fair trade chocolate, sprouted flax, natural vanilla “straight from the vanilla pod,” cinnamon and sunflower seed butter.

BAKERY PRODUCTS IN NORTH AMERICA

BAKERY, NORTH AMERICAN LAUNCHES JAN. 2009-DEC. 2013

Looking at all bakery products, it's again flavors outside of fruits where upward trends are most evident. Pistachio increased from 1 bar to 12. Poppy Seed has 18 mentions in 2013 after only 7 in 2009. Sea Salt grew 238% with 27 launches in 2013. Sweet brown flavors also have made more appearances over the years: Caramel (22 to 65), Creme Brulee (0 to 4) and Dulce de Leche (1 to 5).



Tutti Gourmet Pistachio, Cranberry & Anise Biscotti

Handmade product contains no gluten, wheat, dairy, soy corn or peanuts. Positioned as good on its own or dipped in sweet wine, coffee or other drinks.



Michel & Augustin Poppy & Vanilla Shortbread Biscuits

Made with fresh butter and natural vanilla.



Almondina Toastees Lemon, Poppy and Almond Crisps

All natural and baked with simple ingredients, with no cholesterol, dairy, preservatives, added salt and fat. Enjoy on its own or with toppings.

GLOBAL BAKERY PRODUCTS

BAKERY, GLOBAL LAUNCHES JAN. 2009-DEC. 2013

In Asia, Cherry Blossom, Durian, Melon and Yuzu fruit flavors have seen increases since 2009.

Cherry Blossom rose from 2 products to 12, seen paired with cream, cake, custard, cherries and even cherry leaves. Already popular in items such as bath products, Cherry Blossom has steadily climbed in global appearances across all categories. Since 2005, it has increased from 44 products to 742 products — a 1,586% increase. Beyond personal products and grain applications, we're seeing recent launches of new food and beverage items such as a Cherry Blossom soy drink and a special Häagen-Dazs ice cream.

Durian more than doubled from 12 bakery launches in 2009 to 33 in 2013 and is sometimes paired with Chocolate in warm cakes or crunchy biscuits. The citrus fruit Yuzu only had 6 launches in 2013, but in 2009 there was only 1 on the shelves. We see it paired with sweet flavors like strawberry and white chocolate chip or savory pepper flavor.

Melon flavor in global bakery products rose 414%, climbing to 36 launches in 2013. Bran, cookie crumbles and chocolate chips were ingredients sometimes paired with the flavor.

We also see a bump in Red Berry (+233% since 2009) and Passionfruit (+112% since 2012) with new products showing up from Europe to South America.



Circle K Sunkus MOT Project Milk Cream and Cherry Blossom Danish, Japan

Pastry filled with milk cream from Kanagawa prefecture, cherry blossom flower extract and almond pastry.



Häagen-Dazs Mini Cup Sakura 30th Anniversary Cherry Blossom Ice Cream, Japan

Features cherry blossom ice cream, cherry sauce and cherry blossom sauce. It combines unique flavor of sakura complemented by aromatic and sour cherry sauce.

GLOBAL BAKERY PRODUCTS (CONTINUED)



Noel Festival Wow! Chocolate Sandwich Cookies Filled with Red Berry Cream, *Venezuela*



Finest Bakery Peach and Maracuja Mini Cakes, *Hungary*



Kikkoman Kibun Cherry Blossom Flavor Soymilk, *Japan*



Selection Chabrior Apple & Red Berry Flavored Breakfast Biscuits, *France*



Hawaiian Sun Lilikoi Passion Fruit Pancake Mix, *USA*



Bauli Le Nuvelle Yogurt and Red Berries Cakes, *Italy*



Puro Chocolate Art Honey Bread with Passion Fruit, *Brazil*

Similar to our findings in North America, it's ingredients outside of fruit where we see increases of more substance since 2009 in global bakery launches. Sweet Potato grew from 22 to 61 launches. Green Tea from 67 to 123. Azuki/Red Bean increased from 56 to 130 launches. Cashew grew from 42 to 86. Flax from 29 to 52. Butterscotch (+83%) and Speculoos (+667%) added sweetness to more bakery items, as well, over the time period.

- **Cherry Dolce Sweet Potato Apple Tart, Japan**
A slice of cake filled with sweet potato and topped with apple preserves.
- **Saint Honore Cake Shop Green Tea Flavored Red Bean Long Bread, China**



**Muffins Light Pan Gourmet
Green Tea Muffin with
Fruit, Mexico**

Made with 100% natural ingredients and
sweetened with stevia.



**Vermeiren Organic Speculoos
Biscuits with Chocolate
Chips, Belgium**

SUMMARY: TRENDING FLAVORS

The tried and true flavors like apple, blueberry and strawberry are still top fruit flavors with a few others making modest gains globally, but it isn't these new fruits that we've seen really trending upward in bars and bakery. Browns like Butterscotch, Caramel, Toffee, Nut Butters and Speculoos, and nuts, seeds, grains, yogurt, honey and sea salt are what we see on the rise.



FONA CAN HELP!

Let FONA's market insight and research experts translate these trends into product category ideas for your brand. They can help you with concept and flavor pipeline development, ideation, consumer studies and white space analysis to pinpoint opportunities in the market.

Our 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. We understand how to 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 every step of the way.

CONTACT OUR SALES SERVICE DEPARTMENT

at 630.578.8600 to request a flavor sample or visit www.fona.com.