

20 FLAVOR 15 INSIGHT



FRESH PICKED TASTE

A Sweet Snapshot of Fruit Flavors

When you think of fresh fruit flavors, what comes to mind? The zest and spray of a freshly peeled orange? The tart, sweetness from a perfectly ripe cherry? Maybe it's the warm comfort of homemade apple pie brimming with Granny Smith goodness. Anyway you peel it, slice it, or savor it, fruit flavors are the fresh difference for many applications. Join us as we explore a snapshot of the world's favorite fruit flavors with a spotlight on North America.

A GLOBAL VIEW

Fruit Flavors of the World

When looking at worldwide new product introductions in food and beverage featuring fruit flavors, the fan favorites are definitely present. Of course, your berry flavors are ever present with strawberry, raspberry and blueberry in the top ten. Strawberry flavors have increased 25% since 2010 and if 2015's numbers are any hint, this stands to be a record year for the green-capped red beauty. Citrus flavors (orange, lemon, lime) have increased a remarkable 31% between 2010-2014 with 2015 expected to continue the upward projection. One standout worth mentioning is plum, which has grown a staggering 73% since 2010.



GLOBAL FOOD & BEVERAGE PRODUCT LAUNCHES FEATURING FRUIT FLAVORS

	2010	2011	2012	2013	2014	2015*
Strawberry	3147	3214	3350	3846	3934	815
Orange	1987	2045	2132	2575	2467	473
Lemon	1697	1664	1886	2203	2262	363
Apple	1288	1281	1405	1663	1769	353
Raspberry	956	1004	1030	1194	1200	255
Peach	797	810	878	1041	1125	204
Mango	676	733	788	1063	1127	192
Blueberry	692	721	802	905	974	162
Cherry	704	714	734	825	762	161
Grape	683	753	726	769	801	128
Pineapple	632	608	677	841	903	151
Banana	517	530	610	742	757	135
Berry	383	472	491	588	645	102
Apricot	439	433	485	550	519	118
Cranberry	348	379	446	495	582	116
Plum	277	350	372	399	478	74
Raisin	266	259	338	386	483	95
Lime	243	246	269	357	427	72
Pear	240	240	233	294	354	63
Black Currant/Cassis	259	252	239	314	292	66

Source: Mintel GNPD

CATEGORICALLY SPEAKING

THE WORLD VIEW

It should come as no surprise that the beverage category contains the most growth for global fruit flavors. Whether in smoothies, drinkable yogurts, juice blends or nectars in RTD formats, consumers love to drink the flavor of their favorite fruits, especially in a juice. Of particular note is the growth in the fruit flavored tea category along with the flavored alcoholic beverage category. While some evidence suggests a flattening in the alcoholic category, expect the tea category to continue to grow with the consumers continued focus on health and wellness. Additionally, juice bars, raw bars, freestanding smoothie concepts and QSRs are finding wild success with fruit flavored beverages, as well.

The beverage category
contains the most growth for
worldwide fruit flavors.



WORLDWIDE FRUIT FLAVORS BY CATEGORY

Categories	2010	2011	2012	2013	2014	Total Sample
Juice Drinks	3893	3917	4485	5836	5968	1104
Dairy	3114	3077	3609	4134	4737	880
Bakery	3051	3016	3119	3960	4485	873
Snacks	2362	2650	3240	3652	4649	895
Sugar & Gum Confectionery	2898	2860	3072	3020	3234	628
Desserts & Ice Cream	2480	2575	2836	3416	3669	586
Sweet Spreads	1465	1457	1499	1735	1777	345
Other Beverages	1267	1392	1421	2011	1816	328
Chocolate Confectionery	1416	1371	1265	1568	1956	419
Carbonated Soft Drinks	1138	1087	1242	1608	1705	277

Where Flavors matches one or more of [Berry Fruit, Citrus Fruit, Fruit] but does not match Fruit as the flavor and Date Published is between Jan 2010 and current date (*Mar 2015).

CATEGORICALLY SPEAKING

THE NORTH AMERICAN VIEW

The category picture is still quite flavorful for fruit flavors in North America. Even convenience stores are upping their game in the better-for-you arena to capitalize on consumers' desire for freshness on-the-go. The dairy segment has seen the most growth, which is to be expected given the skyrocketing popularity of Greek yogurt and other yogurt products. Spoonable yogurt containing fruit and citrus flavors has increased 56% since 2010 and the cup isn't empty yet.



NORTH AMERICAN FRUIT FLAVORS BY CATEGORY

Categories	2010	2011	2012	2013	2014	Total Sample
Snacks	560	621	702	657	700	119
Juice Drinks	606	548	523	563	549	93
Bakery	527	528	507	525	523	78
Dairy	308	333	393	559	558	124
Desserts & Ice Cream	419	374	384	437	359	50
Sugar & Gum Confectionery	368	391	386	394	379	48
Alcoholic Beverages	187	204	231	324	318	50
Other Beverages	174	226	258	305	251	52
Chocolate Confectionery	218	228	200	203	188	42
Sweet Spreads	305	201	165	167	136	26

Spoonable yogurt containing fruit and citrus flavors has increased **56%** since 2010.

Source: Mintel GNPD

A VIEW FROM HOME

FRUIT FLAVORS OF NORTH AMERICA

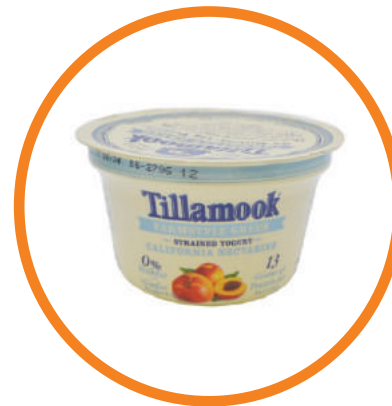
Strawberry, orange and lemon standouts are timeless consumer favorites both globally and in North America. Beyond these top three fruit flavors for food and beverage introductions, the similarities stop. Whether or not it has something to do with George Washington or not, cherry is always a favorite flavor in North America. Stone fruits, grape, and the antioxidant-famous blueberry more than hold their own with consumers. Top growing flavors move away from the classics and include lemon peel, cantaloupe, yuzu, nectarine, mulberry, goldenberry and chokeberry/aronia.



Evolution Harvest Cashew, Cranberry,
Almond & Goldenberry Mix



Texas Tea Pecos Cantaloupe White Tea



Tillamook Farmstyle Greek California
Nectarine Strained Yogurt



Sencha Naturals Green Tea Mints
Yuzu Ginger Mints

RIPE FOR THE PICKING

MOCKTAILS / SODAS

Not every consumer wants an alcoholic beverage. Many health conscious consumers are switching to alcohol-free alternatives, but still looking for a cocktail-like taste experience. The influx of home water carbonators, Keurig's recently inked partnership with Dr. Pepper Snapple group and Starbucks handcrafted customized sodas only further serves to create a strong foothold in the beverage market for mocktails and premium soda.

The most popular flavors mentioned within fruit-flavored soda new product introductions are citrus and orange. Meanwhile, growth has been seen among grape (33%), lemon (22%) and peach (20%).



A TOUCH OF THE EXOTIC

Look for exotic, tropical fruit flavors like dragon fruit, passion fruit, goji berry, mangosteen and papaya to create a flavor adventure for travel-hungry consumers.

Adding blueberry to other superfruits also brings a traditional quality and makes the super or exotic fruit more approachable for consumers. Plus, the antioxidant properties of blueberries allows consumers to feel good about their indulgent choice.

HOT AND COLD

Pairing fruit with heat or cooling sensations (i.e. combining w/peppers or mint) creates a flavor experience for the consumer. Expect to see more concepts with the sweetness of fruit counteracting the spiciness of varietal peppers.

PULL OUT A PLUM

Dried plums are becoming stars of the pastry cart due to their moisture-making ability and high fiber profile. The added sweetness while reducing sugar and calories creates an opportunity for applications needing a healthy boost.

HEALTH HALO

The health halo associated with fruit flavors (especially when combined with vegetable flavors) gives consumers permission to indulge in categories like desserts, ice creams or beverages because of the perceived health benefits fruits add.

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.

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SOURCES

Mintel GNPD, Mintel Menu Insights

