

# 20 CATEGORY INSIGHT 17 REPORT



## *Taste the Season:* A Look Back at Fall's Seasonal and Limited Edition Flavors

Let's "fall" back! We're taking a look at the seasonal and LTO offerings from this past fall. What can we learn from new seasonal product introductions, and what opportunities do we see in the space? We'll start our exploration with new product launches tagged as seasonal or as limited time offers and look at examples that hit the store shelves these past few months. From continued favorite pumpkin spice to up-and-comers maple, PB&J and cookie butter, there's plenty to check out — and plenty to learn from.

# PSL FOREVER

Seasonal heavyweight pumpkin spice catapulted into history back in 2003 when Starbucks introduced the Pumpkin Spice Latte. Popular enough to have over 114K Twitter followers and 37K Instagram followers, @TheRealPSL continues to inspire product development across food, beverage and beyond, to just about every category imaginable.<sup>1</sup>

Consumers can have their pumpkin spice fix in everything from alcoholic beverages to side dishes to ice cream. They even have the opportunity to share their love for this seasonal favorite with their pets, as food and treat options formulated for our furry friends have begun to hit the marketplace, including:

- Bocce's Bakery Pumpkin, Peanut Butter & Cinnamon Dog Biscuits
- Greenie's Pumpkin Spice Dental Dog Treats.<sup>2</sup>



## BEYOND PSL

Let's look beyond this perennial fall favorite and examine other flavors that have emerged as strong contenders for share of mind and wallet amongst fall seasonal product consumers. Next up? Maple. Let's see how it performed in the popular introductory environment of the café or coffeeshop.

# MAPLE: A FALL CONTENDER WORTH CONSIDERATION

If there's another flavor positioned to steal limelight and frenzied anticipation from PSL, it might just be maple. It has been very interesting to watch the strong seasonal menu and retail product introductions focused on maple and maple flavor pairings this year. It may not replace pumpkin spice but perhaps it will co-exist as a repeat consideration for 2018 in retail foodservice. Maple can also provide inspiration and opportunity for category expansion beyond the lead seasonal categories of chocolate, alcohol and sweet and savory snack categories.

From a product introduction standpoint here are a few examples that reinforce maple's strong popularity as a fall flavor:

- CoffeeMate – Natural Bliss Maple Pecan Creamer
- Russel Stover – Maple Flavored Marshmallow Milk Chocolate Pumpkin
- Samuel Adams - Maple Red Beer
- Three Jerks – Maple Bourbon Beef Jerky



## MAPLE IN RETAIL FOODSERVICE

Marketing efforts and dollars spent to promote maple have also been very strong in retail foodservice settings. Probably most significant is the fact that Starbucks featured maple as a latte flavor to sit alongside their PSL and introduced Maple Pecan this past season. Not to be outdone, Dunkin' Donuts featured maple two ways in their seasonal menu, as Maple Pecan Coffee and a Sugar Maple Bacon Breakfast Sandwich were announced with a nationwide promotion. A complimentary coffee and sample of the sandwich at stores located on Maple Street launched in August, kicking off the season.<sup>3</sup>

Of course, maple was an additional seasonal flavor that sat alongside a host of pumpkin offers, from coffee to donuts to a pumpkin cream cheese spread for their bagels. Key to note is the goal of creating interest "in addition to" not "in place of" pumpkin or pumpkin spice.

## YEAR-ROUND INTEREST

As we move past fall, do not take maple out of consideration for your product innovation. As a flavor, flavor pairing or as an ingredient that delivers a natural sweetness, maple has the ability to transcend seasons.



# PEANUT BUTTER & JELLY: A 2017 FALL FLAVOR STANDOUT

A bit of a head scratcher... it is interesting when flavors emerge that catch us by surprise when looking back at a season. For Fall 2017, Peanut Butter and Jelly certainly fits the bill as it appeared in a number of categories in both nationally branded and private label products. Perhaps we can find the tie-in to Fall with the classification of it as a true comfort flavor. PB&J takes many people back to childhood and a simpler time. Whatever the motivation, here are three examples we found on shelf with this classic favorite.

- Nabisco Oreo - P B & J Cookies
- JC's Scoops –Peanut Butter and Jelly Donut Ice Cream
- Great Value – PB&J Pancake & Waffle Mix



## PEANUT BUTTER

In flavor position number six for seasonal U.S Food & Beverage products launched August through October 2017,<sup>4</sup> we see peanut butter take the spotlight with 11 new product introductions. Although some of these were the peanut butter and jelly combos referenced above, many were the single flavor of peanut butter. A strong influencer to the significant number of launches was Hershey with their Reese's brand. They not only brought to market new Halloween chocolates but showed some creative category expansion by moving into baked goods. This innovative item is not prepackaged but rather a program where the cookies are freshly baked and packaged in-store.

- Hershey – Reese's Pieces Cookies with Peanut Butter Candies



# COOKIE BUTTER

First introduced into the U.S. in 2011, Cookie Butter is a cousin to the popular Nutella spread. At Trader Joe's this creamy concoction took its inspiration from the Belgian Speculoos or Windmill cookies and it now is the inspiration behind a host of creative and innovative new products.

Cookie butter is going beyond a product and is becoming a signature taste. We're spotting cookie butter as both an ingredient and flavor in various food product categories. One decadent example is Blue Bunny Cookie Butter Flavored Ice Cream, which PopSugar.com describes as filled with speculoos cookie chunks, a speculoos caramel and a cinnamon graham swirl.<sup>6</sup>

Where else was cookie butter spotted? Just in the past three months these products were found in various retail settings.

- HEB - Zoet Speculoos Cookie Butter Chocolate Truffles
- Tillamook - Pumpkin Cookie Butter Ice Cream
- Nabisco Oreo - Cookie Butter Filled Cookie
- Arby's - Cookie Butter Milkshake





## SEASONAL SPICE

Fall is a season recognized for the aromatics of spice and spice blends. This season we have seen spice influence and create excitement and interest across a number of categories. Cinnamon & Nutmeg have been popular as standalone as well as in combination. Here are just a few of the many products that caught our attention.

- Crackers – Triscuit Nutmeg & Cinnamon Crackers
- Juice – RW Knudsen Spice Pear Juice (Cinnamon Lemon & Orange)
- Chips – Savoritz Cinnamon Carmel & Apple Pita Chips
- Chips – Terra Pumpkin Chips with Cinnamon & Nutmeg



## WAY OUT THERE...

What is the wackiest flavor we spotted these past few months? Hands down it was the savory-inspired latte introduced by the Canadian coffee chain Tim Horton's. It was not found in Canada but was a feature in two Buffalo, New York stores.

Buffalo Wing Latte anyone? This drink was an espresso based mocha latte with a zesty granulated buffalo spice sprinkled liberally on the whip cream topper.



## FONA FOR ALL SEASONS

Whether you are looking for that perfect flavor to star in the next holiday coffee drink, snack item or in a seasonally inspired confection FONA's marketing experts and application scientists are here to help. Seasonal and Limited Editions innovation is big business and consumers' obsession isn't going to subside anytime soon.

### FONA CAN HELP!

Let us help you translate these trends into concept and flavor pipeline development ideas. Ideation services, consumer studies and white space analysis are all services available to help you pinpoint opportunities in the marketplace.

Our flavor and product development experts can help you meet your desired labeling from a technical and regulatory standpoint while delivering a complete taste solution that supports your brand and delights your consumers.

**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](http://www.fona.com).

## SOURCES

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