

A top-down view of a white bowl filled with multi-colored cereal (red, yellow, blue, green, orange) on a light-colored wooden surface. Some cereal pieces are scattered on the table around the bowl. A semi-transparent blue rectangular box with a thin red border is positioned over the left side of the bowl, containing white text.

FLAVOR COMBINATIONS: THE TRIED, THE TRUE, AND THE UNEXPECTED

As commonplace as PB&J, flavor combinations in food and beverage are going through a time of transition. While some innovative brands are pushing the envelope with unique pairings – other categories (ahem, cereal) are sticking with the tried and true. From sour soaring to buzzworthy conversation starters to those favorite flavor combinations that never say die, let's explore what tastes are partnering up to create growth in food and beverage. Turns out there's opportunity to be found in both the classics and the not-so-classic.

GENERATIONAL DIVIDE

Recent trends have shown a divide in generational preference when it comes to flavor. Younger generations, such as Gen Z and Millennials, are more willing to try new flavors, while older generations, such as Baby Boomers, stick to a narrower selection of flavors. Flavor combinations seem to offer a vehicle to bridge that gap and capture a wider audience. Pairing the tame with the innovative is what some brands are doing successfully. **One thing the consumers asked agree on, upon no matter the generation: Taste.**



“

“The growing divide in flavor preferences between Millennials and Boomers heightens the need for a product mix that appropriately balances familiarity and innovation”
- Kelly Weikel, Technomic

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67%

67% of consumers choose flavor as a purchase driver for snacking products

64%

64% of consumers choose flavor as a purchase driver for confectionery products

REINVENTING THE WHEEL

Let's take a look at recent notable products that have tested flavor combination boundaries.



SPRINKLES HOT CHEETO CUPCAKE (USA):

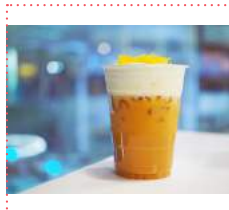
In July of 2018, Sprinkles launched their Sprinkles Flamin' Hot Cheetos cupcake. Made with their signature vanilla cake filled with Flamin' Hot Cheetos and topped with a white cheddar cheese frosting, the combination made for a treat that was sweet, spice, and everything nice.



TIM HORTON'S SPICY BUFFALO LATTE (USA):

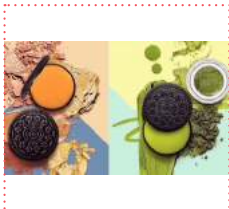
Sprinkles hot cheeto cupcake not hot enough? In 2017, Tim Horton's delved into a sweet and spicy creation with a spicy buffalo latte bound to make your mouth water.

Image Source: Chicago Tribune



CHEESE TEA (ASIA):

Two worlds collide with this up-and-coming beverage trend. Cheese tea first launched in Asia and has now made its way to the states, offering consumers a unique beverage consisting of fruit-blend tea topped with a cream cheese blend. Social media mentions are up 25%



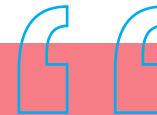
OREO FLAVORS (CHINA):

Known for their wide array of flavors, 55 according to Teen Vogue, Oreo continues to think of what's next with their Hot Chicken Wing and Wasabi-flavored Oreos in China, combining chocolate with the out-there.



POTATO CHIPS WITH STRAWBERRY AND CHOCOLATE (JAPAN):

Catered to sweet and salty lovers, Calbee Plus in Japan offers potato chips topped with strawberry and chocolate that balance sweet and savory.



“While some food creations are designed purely for shock value, more dishes are being created to push the boundaries of what could be considered enjoyable”
-Mintel



TOP FLAVOR COMBINATIONS

Of course, there's still an audience for the classics. The top overall flavor combinations across food and beverage feature the sweet and savory tried-and-true flavors that so many know and love.

Cross-Category, Most Used Flavor Combinations

APPLE & CINNAMON

TOMATO & BASIL

PUMPKIN/SQUASH & SPICE/SPICY

CHOCOLATE & PEANUT BUTTER

FRUIT & PUNCH

GARLIC & HERBS/HERBAL

LEMON & LIME

SOUR CREAM & ONION

STRAWBERRY & BANANA

(GNPD, All Food and Beverage North America 2014-2018)



SHOCKING SOURS: SWEET AND SOUR ON THE RISE

Sour seems to be soaring. Tart, tangy, and acidic, these mouthwatering, lip puckering flavors (typically a combination of a sour flavor paired with a fruit flavor) are on the rise. **From 2017 to 2018, sour confection launches increased 21.5%.** Additionally, most of the top confectionery flavor combinations included the word sour. In fact, when searching “sour & lemon”, more than 7,280 products globally returned, making sour’s presence a stand out in this category. Can other categories pair sour with flavors in new development?

Top Confectionery Flavor Combinations

Though combinations including caramel, peanut, and nougat make an appearance, sour dominates the list in the confection category.



SALT (SEA)/ FLEUR DE SEL & CAMEL/CAMELISED

SOUR & LEMON

SOUR & WATERMELON

SOUR & APPLE (GREEN)

PEANUT/GROUNDNUT & CAMEL/CAMELISED & NOUGAT

SOUR & STRAWBERRY

SOUR & BLUE RASPBERRY

SOUR & CHERRY

SOUR & ORANGE

SOUR & APPLE



(2014-2018, North America)

SOARING SOURS IN CANDY

PRODUCTS OF NOTE:



SOUR PUNCH STRAWS are described as a sour and strawberry flavored candy. The product is said to be an artificially flavored and kosher certified product produced with genetic engineering.



TROLLI SOUR BRITE CRAWLERS MINIS are said to be a sour gummy candy with flavors including cherry-lemon, strawberry-grape and orange-lime. The product is described as having lip smacking, sweetly sour, and mind warping tastiness.

CONSUMER PERCEPTION:

46%

46% of consumers responded that they likely or definitely would buy this product, **SIGNIFICANTLY OUTPERFORMING** its subcategory.

48%

48% of consumers responded that they likely or definitely would buy this product, **SIGNIFICANTLY OUTPERFORMING** its subcategory.

A Unique Take on Sour: Sour Patch Kids Cereal

FIRST THEY'RE SOUR THEN THERE'S...MILK? This take on Sour Patch Kids seems may be a miss with some consumers. According to the Washington Post, though the cereal itself is a treat, when the milk left behind is the taste of, well, sour milk. Not only is this taste unwelcomed by most consumers, but it also deprives them the luxury of sipping the leftover sugary milk at the bottom of the bowl. Looking at consumers' initial impression, 30% of consumers responded that they would possibly try this product, underperforming against subcategory.



SEASONAL SHOWSTOPPERS

For product developers looking to create a new flavor combination, going the LTO or seasonal route is often the right bet. A lower risk way to innovate, research shows that seasonal offerings often receive positive consumer response.

88%

88% of consumers are more likely to try a new flavor if it's seasonal

96%

96% agree that seasonal menu items feel like a treat

80%

80% look forward to fall seasonal items the most

PUMPKIN SPICE STILL SUPERME

Speaking of fall, near and dear to many consumers' hearts lies pumpkin spice, the all-time favorite fall flavor combination that never says die. With 44 social mentions per minute in the Fall 2018 season, pumpkin spice comes in many forms from the classic pumpkin spice latte to 5-minute paleo pumpkin muffins to "drunken RumChata pumpkin lattes." With 92% positive perception from consumers, pumpkin spice is not going out of style just yet. In fact, mentions grew 29% 2017-2018. Kate Taylor, Business Insider reporter states, "I think every year it's going to feel like pumpkin spice will hit its peak, but somehow continues to drive sales."



FLAVOR COMBINATIONS TOPPING THE SEASONAL CHART

Regarding seasonal food and beverage, we're spotting what you might expect, such as classic indulgences that bring back nostalgic memories. And of course, pumpkin spice makes the top of the list.

All Food & Beverage North America 2014-2018

PUMPKIN/SQUASH & SPICE/SPICY

SOUR & APPLE

CARAMEL/CARAMELISED & APPLE

CHOCOLATE & PEPPERMINT

SALT (SEA)/FLEUR DE SEL &
CARAMEL/CARAMELISED

PEANUT/GROUNDNUT & CARAMEL/
CARAMELISED & NOUGAT/TURRON

LEMON & LIME

APPLE & CINNAMON

CHOCOLATE & MARSHMALLOW



STAYING IN THEIR LANE: SNACKS & CEREAL STICK TO THE STATUS QUO

When it comes to snacking and cereal, the classics remain the most used flavor combinations in these segments. Topping the list are sweet snacking combos such as peanut butter and chocolate and apple and cinnamon. Savory combos in snacking such as sour cream and onion, salt and vinegar, and teriyaki and beef make their way onto the list of most used flavor combinations as well. In cereal, familiar flavor combinations such as apple and cinnamon and maple and brown sugar topped the list of most used flavor combinations.

What's interesting is that although usage of mint/chocolate; pumpkin/spice; and maple/pecan have grown significantly 2014-2018, consumer perception on many of the new releases remains low.

Growing Flavor Combinations from 2014-2018

- MINT & CHOCOLATE FLAVOR COMBINATIONS HAVE GROWN 350%
- PUMPKIN & SPICE FLAVOR COMBINATIONS HAVE GROWN 500%
- MAPLE & PECAN FLAVOR COMBINATIONS HAVE GROWN 500%



GROWING FLAVOR COMBINATION PRODUCTS IN SNACKS & CEREAL

Although the flavors featured in these products grew in numbers of launches, consumer perception does not seem to be keeping pace.

PRODUCTS OF NOTE:



CHOCOLATE MINT POWER CRUNCH ENERGY BAR

is said to be made with high-dh hydrolyzed whey protein in a a crème filled wafer bar form. Providing 13g protein and 5g sugar, the product is described as an energy bar.

CONSUMER PERCEPTION:

28%

28% of consumers responded that they likely or definitely would buy this product, **UNDERPERFORMING** its subcategory.



PUMPKIN SPICE LIFE MULTIGRAIN CEREAL

is said to be made with high-dh hydrolyzed whey protein in a a crème filled wafer bar form. Providing 13g protein and 5g sugar, the product is described as an energy bar.

36%

36% of consumers responded that they likely or definitely would buy this product, **UNDERPERFORMING** its subcategory.



MAPLE PECAN THINKTHIN PROBIOTICS HOT OATMEAL

is said to contain 10g protein and is described as a nutritious and delicious oatmeal crafted for muscle and digestion support.

30%

30% of consumers responded that they likely or definitely would buy this product, **UNDERPERFORMING** its subcategory.



THE TAKEAWAYS

Whether classic and expected, bold and daring, or downright shocking, flavor combinations can pave way for innovative or nostalgic tastes. According to Mintel, 91% of consumers say they want a flavor they prefer when snacking, while 34% look for exotic flavors. There are contrasts in generational preferences opening the door to adventurous flavor combinations in future years. While tried and true flavor combinations –executed with excellence – will always find an audience, there’s also an interest in spins on the traditional. Insta-worthy out-there combos and seasonal releases are worth exploring for some brands. Consumer response to often-used flavor combinations in cereal and snacks reveals that those segments may not be moving the needle quite enough. All in all, the space shows there is a time and a place for flavor innovation, but the right combination often means balancing traditional faves with “new and different.”

YOU DESERVE MORE. LET’S GET STARTED.

What does true partnership look like? You deserve a flavor partner ready to turn these trends into the tangible.

Let FONA’s market insight and research experts get to work for you. Translate these trends into bold new ideas for your brand. Increase market share and get to your “what’s next.” Our technical 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. Let’s 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 for you — every step of the way. Contact our sales service department at 630.578.8600 to request a flavor sample or chat us up at www.fona.com/contact-fona/



SOURCES

- Mintel
- Iconoculture
- Infegy
- Technomic
- GNDP
- Thrillist
- ABC News
- Teen Vogue
- Washington Post
- Chicago Tribune