

The background of the slide features two glasses of a vibrant orange beverage. The glass on the right is a martini-style glass with a salt rim and a slice of jalapeño on the edge. The glass on the left is a lowball glass with a similar drink and a jalapeño garnish. The text is overlaid on a semi-transparent orange rectangle in the center.

TREND INSIGHT: SWEET HEAT

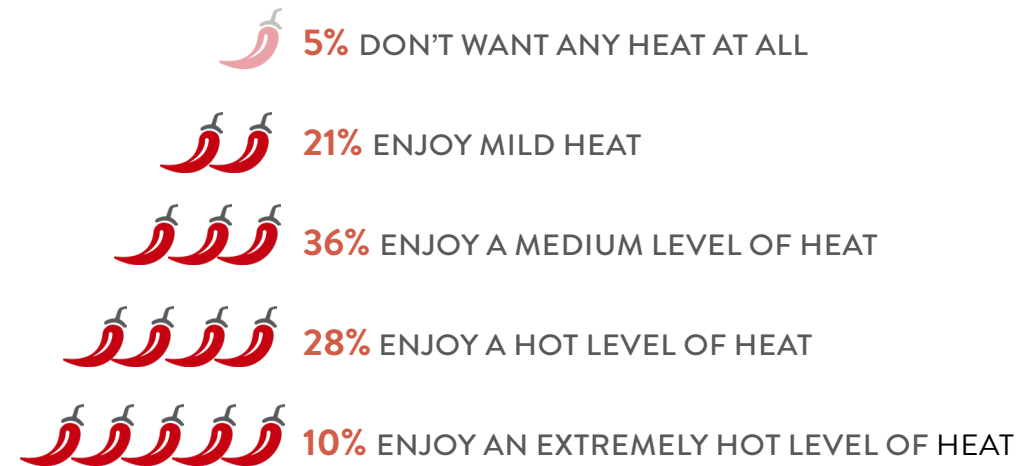
Spicy flavors are enjoyed by three quarters of consumers according to Mintel, and this trend continues to blaze forward with new and exciting flavors meeting consumers' growing demand for globally inspired seasonings and sauces. Today's consumers crave unique pepper profiles and sweet, spicy heat—from honey serrano snack nuts to aleppo pepper ice cream to pink peppercorn martinis, consumers like it hot. Let's dive into consumer preferences when it comes to heat, hot new products, up and coming peppers and more in this sweet heat report and see where you can find opportunity in this space.

CONSUMER INSIGHTS

According to Mintel, 75% of consumers enjoy spicy foods to some degree, with 29% of consumers agreeing with the statement “when it comes to spicy, the hotter the better”. In their recent Spicy Perceptions Report, ingredient manufacturer Kalsec found that 62% of consumers think most savory foods taste better with some level of spiciness. A quick scroll through Pinterest or Instagram confirms these industry findings—#spicy has 10.7M uses on Instagram, and recipes found on Pinterest abound: roasted mango habanero salsa, honey sriracha chicken, spicy jalapeño margaritas, and more.

Today’s consumers are intrigued by more than just the level of heat in the spicy foods and beverages they consume. Their preferences are expanding beyond mild, medium, and hot to more nuanced, pepper-specific flavors like ancho, serrano, and habanero; as well as spicy flavor pairings with sweet and tangy flavors like spicy smoked maple or peri-peri pineapple. Ultimately, the demand for greater variety in spicy foods is driven by consumer desire to explore more authentic global cuisines and flavors.

AMERICA’S TASTE THRESHOLD FOR SPICINESS



SOCIAL SPOTTINGS

#spicy has 10.7M uses on Instagram, and recipes found on Pinterest abound: roasted mango habanero salsa, honey sriracha chicken, spicy jalapeño margaritas, and more.

AGE & GENDER

Consumers across the generations crave spicy flavors, but preference for spiciness can vary, with younger consumers showing more interest in higher levels of heat. Technomic's data show that 59% of consumers aged 18–34 prefer very spicy foods. Hot sauces are especially appealing to consumers ages 18-34; and 28% use them frequently on a variety of foods, according to Technomic's *Flavor Consumer Trend Report*. When dining out, consumers between the ages of 35-44 are the most likely to order spicy food, and consumers aged over 54 are the least likely age group to do so when dining out.

In 2017, Kalsec found that men preferred higher levels of heat in their foods and consumed spicy foods more often than women. However, their 2019 survey results show women now prefer the same level of heat and enjoy the same rate of consumption as men

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CONSUMERS WANT SWEET HEAT

Spicy and sweet flavor combinations are trending, and according to Mintel 2 in 3 Americans are interested in sweet and spicy flavors. Datassential recently asked consumers about their preferred heat level for condiments that tend to have varying spice levels (like mustard and barbeque sauce) and 18% of consumers chose "spicy, balanced by sweet" as their favorite flavor profile. This provides brands the opportunity to get creative with balancing sweet and heat in a variety of products.

PRODUCTS OF NOTE



HEINZ HONEYRACHA SAUCY SAUCE is said to contain the delicious taste of real honey and sriracha.

45% of consumers responded that they likely or definitely would buy this product



TRADER JOES HONEY ALEPPO SAUCE is described as a sweet, savory, tangy and slightly spicy all-purpose sauce inspired by Middle Eastern cuisine. It is said to be made with crushed Aleppo peppers, which give it unique earthy and cumin-y undertones.

25% of consumers responded that they likely or definitely would buy this product

HEATING UP THE SHELVES

According to Mintel GNPD, there were 1,343 spicy flavored products launched in North America from September 2017 – September 2020 .

TOP FLAVORS

- Hot & Spicy
- Sweet & Spicy
- Jalapeno
- Sriracha
- Buffalo
- Thai Green Curry
- Spicy BBQ
- Chipotle
- Spicy Mustard
- Spicy & Cheese

FASTEST GROWING FLAVORS



INNOVATIVE FLAVORS & FORMATS

Savory spicy products reign, but with sweet & spicy as the second top trending flavor in new products, we've spotted brands launching flavor mashups like Peeps and Hot Tamales, as well as unique sweet and spicy combos like spicy aleppo peanut butter caramel.



PRODUCTS OF NOTE



LAY'S FLAVOR ICONS NASHVILLE HOT CHICKEN FLAVORED POTATO CHIPS are inspired by Party Fowl in Nashville, and bring their iconic hot chicken flavor to the pantry.

45% of consumers responded that they likely or definitely would buy this product



SPICY RANCH WATER HARD SELTZER is made with 100% organic agave and natural lime juice, plus jalapeño, the official pepper of Texas.

(Image Source: Trend Hunter)



PEEPS HOT TAMALES FIERCE CINNAMON FLAVORED MARSHMALLOWS launched for Easter 2020 and claimed to come with two classic candies in one sweet and spicy treat.

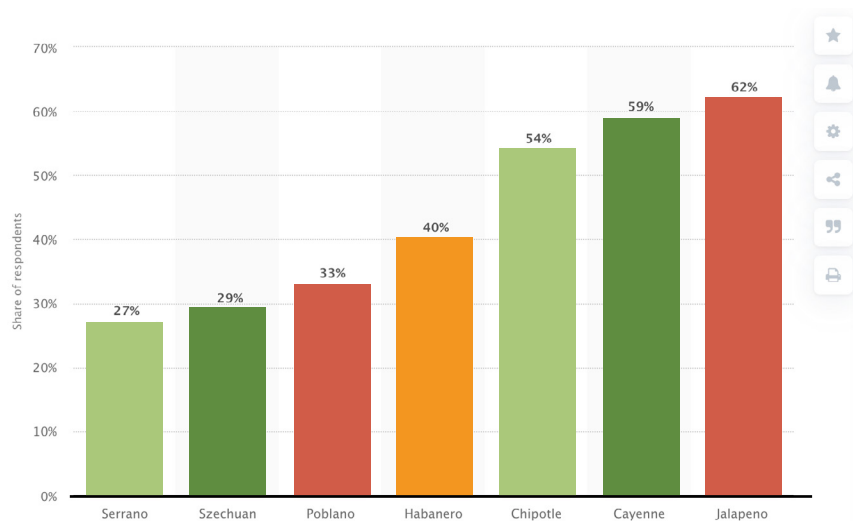
24% of consumers responded that they likely or definitely would buy this product



STARKIST CREATIONS MICROWAVABLES THAI GREEN CURRY TUNA is comprised of wild tuna, rice, green chili, lime juice, coconut milk and lemongrass and is said to deliver a delicately sweet and spicy flavor.

UNIQUE HEAT

Today's consumers can easily differentiate jalapeño from habanero or ancho from Thai red chili. Statista found that jalapeño, cayenne, and chipotle reigned as consumer's favorite hot and spicy peppers; but trending peppers like habanero, poblano, and serrano are also showing up as consumer's top picks. When innovating, pairing a novel pepper flavor with a classic flavor or dish—like calabrian chile on pizza or ancho spiced hot chocolate—could encourage less adventurous consumers to try something new.



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“We have moved well beyond common Hispanic and Asian flavors that are now firmly established in the mainstream and into more hyper-local and specific regional flavors in the spicy flavor palate. Crushed chili peri peri sauce from Africa and Portugal, the fruity and spicy aji Amarillo pepper from South America, a wide variety of curries from India and the Korean fermented red pepper paste gochujang sauce are coming into consumer consciousness similar to the way that sriracha sauce did.”

-FOOD BUSINESS NEWS



Providing a variety of flavors from unique peppers or creating spicy-sweet flavor pairings will connect with consumer's growing interest for authentic global cuisines. And although classics like jalapeño will keep bringing the heat; we want to explore some up and coming pepper flavors spicing things up.

SPICING THINGS UP

AJI AMARILLO

A yellow pepper with fruity, tropical flavor from Peru, aji amarillo is said to be sweet with an acidic undertone, with notes of dried fruit, citrus, green grass and tomato. It's seen a 11.1% increase on restaurant menus according to Mintel.



We spotted aji amarillo in **Private Selection's Peruvian Inspired Aji Amarillo Marinade** which claims to be spicy, zesty, and infuses the bold, tangy flavors of aji amarillo chiles, garlic and lime juice into any dish.

40% of consumers responded they would likely or definitely buy this product

GUAJILLO

One of the most common used chiles in Mexican cuisine, guajillo is also often used for harissa North Africa. Guajillo has a unique tangy, berry flavor with a touch of citrus, and earthy notes of green tea and paprika with a mild heat. According to Mintel, it's seen an increase of 5.2% on restaurant menus.



We spotted guajillo in **Specially Selected's Mild Four Pepper Salsa** with jalapeño peppers, pequin Chile pepper, chipotle pepper and guajillo peppers.

67% of consumers stated they would likely or definitely buy this product



SPICING THINGS UP, continued

PERI-PERI

A pepper so nice they named it twice, peri-peri—also known as African bird’s eye chilli—is a small red pepper with a delayed onset of heat. When consumed in a well-balanced dish, the eater doesn’t feel the heat until later in each bite, allowing for other paired flavors to shine. Peri-peri’s flavor profile is slightly sweet, smoky, with citrus and sharp herbal notes. Mintel found that peri-peri has climbed 41% on restaurant menus.



We spotted peri-peri in **Brooklyn Biltong’s Peri Peri Chili biltong**, a South African style air dried beef featuring garlic, ginger, and peri-peri pepper.

PIQUILLO

The mildest on this list, piquillo is a small, sweet pepper from Spain and has almost no heat—the hottest piquilloes are about five times milder than the mildest jalapeno—with tart and smoky notes. Piquillo pepper mentions have seen 5% growth on restaurant menus according to Mintel.



We spotted this little pepper in **Cucina & Amore’s Red Pepper & Artichoke Bruschetta**, which claims to be mild-spiced and is crafted with sweet piquillo peppers, tender artichoke hearts and spices.

35% of consumers stated they would likely or definitely buy this product

HOT OUT OF THE RESTAURANT

Oftentimes the novel flavors we track come right out of the kitchen of innovative chefs and restaurants around the country. Let's dive into what spicy flavors are trending in restaurants, from the kitchen to the menu to see where you may find inspiration for the CPG space.

IN THE KITCHEN

Adding a novel pepper for a flavor kick or creating an authentic sauce inspired by global cuisines seems to be trending in restaurant kitchens across the U.S.

TOP TRENDING FOODSERVICE SEASONINGS

1. Gochujang – a south Korean savory, spicy-sweet fermented condiment
2. Calabrian Chile – an Italian moderately hot red pepper
3. Shishito – a Japanese mild pepper
4. Harissa – a North African garlicky chile paste
5. Romesco – a Spanish red pepper sauce
6. Chimichurri – an Argentinian green condiment

Source: IFT

AT THE BAR

More and more, we're spotting cocktails featuring peppers and spice. Poblano pepper is up 266% on drink menus, followed by black pepper (33%) and ancho chile (30%). The peppery ingredients are often used to balance sweeter fruity flavors or compliment a menu theme like Asian or Mexican cuisine.

Menu Examples:

- Strawberry Poblano Blanco at Champps Kitchen + Bar features tequila, poblano liqueur, house-made strawberry agave syrup, lime juice, and a salt rim.
- The Dalmatian made with black pepper syrup at Redstone American Grill comprises of vodka, pink grapefruit juice, and house made black pepper syrup.

ON THE MENU

Spicy is a top flavor on restaurant menus, often paired with sweet flavors like hot honey and mango serrano. According to menu market research company Datassential, gochujang has increased more than 200% on U.S. restaurant menus over the past four years while peri peri has climbed up 41%; and over the past three years harissa is up 10% in menu mentions, according to Mintel.



THE TAKEAWAYS

Consumers today are searching for more than just “hot” when indulging in spicy foods—they crave distinct, authentic flavors from specific peppers and interesting flavor combinations, like heat with a sweet and tangy twist. And with 75% of consumers enjoying spicy foods to some degree, product developers can find scorching opportunity in this space, from the average hot sauce to spicy ice cream or spicy flavored marshmallows. To hit the sweet (and spicy!) spot, product developers should consider consumer’s heat preferences, incorporate trending peppers, and consider how to add sweet or tangy complexity to their products.



SOURCES

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- IFT
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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.

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