

SEASONAL FLAVOR LOOKBACK: TRENDS OF FALL

Spanning from September to late December, the fall season is filled with cozy indulgent flavors and savory holiday dishes consumers look forward to each year. Each fall, consumers await innovative seasonal and limited-edition products that feature exciting new flavors, formats and collaborations. While sweet treats in bakery, chocolate confectionery, and snacks dominated this season, product developers can find opportunity in the seasonal and LTO space cross-category.

From fall's flavorful impact on the social media space, to holiday favorites and of course, pumpkin spice, let's take a look back at the trending seasonal products and flavors for fall, and see where you can find inspiration for your brand.



~ 25% OF CONSUMERS

said that limited edition flavors have an influence on their choices.

- INNOVA



We took a deep dive into fall's top flavors and trends and spotted many classics and some notable growing flavors. Below are fall's top flavors in seasonal and limited edition launches this year.

TOP FLAVORS IN SEASONAL/LTO PRODUCTS: North America Introductions, Sept. 2023 - Dec. 2023

- | | |
|---|---|
| ■ Chocolate | ■ Candy Cane |
| ■ Peppermint | ■ Caramel (Salted) |
| ■ Pumpkin/Squash & Spice/Spicy | ■ Raspberry |
| ■ Gingerbread | ■ Cherry |
| ■ Caramel/Caramelised | ■ Biscuit/Cookie |

TOP FLAVORS IN SEASONAL/LTO PRODUCTS: Global Introductions, Sept. 2023 - Dec. 2023

- | | |
|--|--|
| ■ Chocolate | ■ Fruit |
| ■ Gingerbread | ■ Orange/Sweet Orange |
| ■ Hazelnut | ■ Caramel/Caramelised |
| ■ Strawberry | ■ Vanilla/Vanilla Bourbon/Madagascar |
| ■ Milk | ■ Apple |

Source: Mintel GNPD

KEY TRENDS:

- Fall on Social
- Seasonal Celebrations
- Pumpkin Spice, of course!



NOTABLE PRODUCT INTRODUCTIONS:

- Opopop Pumpkin Spice Flavor Wrapped Popcorn Kernels
- Opopop Grandma's Stuffing Flavor Wrapped Popcorn Kernels
- Red Bull Pear Cinnamon Energy Drink
- Member's Mark Creamy Dill & Cheddar Puffs
- Simple Nature Pumpkin Applesauce
- Mozart Chocolate Pumpkin Spice Cream Liqueur
- Trader Joe's Cranberry Orange & Onion Crunchy Chili
- Planters Apple Cider Donut Flavored Cashews
- Cheez It Sizzlin' Bacon Baked Snack
- Rao's Balsamic Marinara Sauce



FLAVORS ON THE MENU 1,321 launched menu items & LTO's in Fall 2023 - DATASSENTIAL

- Wingstop Maple Sriracha Chicken Sandwich
- Cracker Barrel Cinnamon Roll Pie Breakfast
- Arby's Good Burger 2 Meal
- Starbucks Chesnut Praline Frappuchino
- Red Lobster Cinnamon Whiskey Sour



BAKERY, CHOCOLATE CONFECTIONERY & SNACKS

ranked highest for top North America categories with fall seasonal and limited-edition offerings

- MINTEL GNPD

FALL ON SOCIAL

With such excitement around fall flavors, it's no surprise that fall flavors and offerings have become a popular topic on social media. In fact, **#fallflavors** garnered 42.1M views on Tik Tok and 245,508 posts on Instagram from Oct 2022 to Sept 2023 alone! Pumpkin spice and traditional favorites like caramel and apple are finding new life, while maple, pecan, cinnamon, butterscotch and pear are gaining momentum on social.



@drinkspindrift

Hello, **Cranberry Raspberry** and **Spiced Apple Cider!** We heard you wanted them at Target – so we made a little magic happen. Voila! A fresh batch of our **Fall flavors** for **CranRas** and **Spiced Apple Cider** superfan Drifters – and those of you who haven't had the chance to try 'em yet!

@drinkspindrift | 976k Reach



@MrPeanut

Be the first to get in on these **Fall flavors!** **PLANTERS® #AppleCiderDonut Cashews** and **#PumpkinSpice Almonds** are here! Grab yours today and enjoy Snacking SZN! **#SNACKINGSZN #Fall #Autumn**

@MrPeanut | 976k Reach

PUMPKIN SPICE, OF COURSE!

As expected, consumers were craving pumpkin spice the moment temperatures began to drop (or even sooner — some LTOs dropped as soon as August 24th)! From the birth of the Pumpkin Spice Latte to recent creations such as the Pumpkin Spice Frosty and more, while the flavor is well known by consumers, it is still trending and being reinvented in many seasonal and limited-edition offerings spanning food and beverage categories.

46% LOVE PUMPKIN SPICE, 88% know it and 64% have tried it

- DATASSENTIAL

PRODUCTS OF NOTE



TRADER JOE'S PUMPKIN SPICE PRETZEL SLIMS feature thin and crisp pretzels with yogurt flavored coating topped with pumpkin spiced pumpkin seeds. The limited time offering was sold in a 6 oz. bag.



NESTLÉ COFFEE MATE PUMPKIN SPICE FLAVORED COFFEE CREAMER features a sweet like pumpkin pie natural and artificial flavor. It is a non-dairy creamer free from gluten and cholesterol.

PUMPKIN SPICE

showed **+26%** 12-month growth on US menus

- DATASSENTIAL

Sources: Pure Wow, Grubhub

SEASONAL CELEBRATIONS

A time for gathering and celebration, the fall season spans multiple holidays including Thanksgiving, Diwali, Halloween and more that give inspiration for developers. Twists on classic holiday dishes and holiday inspired flavors can excite consumers with a new taste experience.

47% OF CONSUMERS

associate Thanksgiving with eating occasions and with special flavors, dishes, or limited-time menu releases from restaurants.

- DATASSENTIAL

PRODUCTS OF NOTE



ALANI NU WITCH'S BREW PRE-WORKOUT DIETARY SUPPLEMENT was released for Halloween 2023 and contains 200 mg caffeine. **41%** of consumers responded that they likely or definitely would buy this product.



PILLSBURY READY TO BAKE! TURKEY SHAPE SUGAR COOKIE DOUGH was available for Thanksgiving 2023 with 20 pre-cut cookies. **56%** of consumers responded that they likely or definitely would buy this product.

THE TAKEAWAYS

From fall flavors trending on social, to seasonal holiday treats and pumpkin spice galore, the fall season can provide much flavor inspiration for brands in the food and beverage space. As consumers look to the new and exciting, brands can leverage twists on classic flavors and formats as well as connecting with them through intriguing collaborations and campaigns through social media.

Looking for flavor inspiration for your next seasonal or limited-edition product development? Reach out to us for more information. Let's get started!

SOURCES:

Innova
Mintel GNPD
Datassential
Instagram:
@drinkspindrift
@MrPeanut



Request Your
FREE
Flavor Sample Here

Flavorsolutions