

2021

FOOD AND BEVERAGE FLAVOR TRENDS REPORT



T. HASEGAWA



1

CAFFEINE



2

ADAPTOGENS



3

ADDED
VITAMINS



4

HYDRATION



5

IMMUNITY



TOP
INGREDIENTS
2021



6

CALMING



7

FOCUS
ENHANCING



8

MICROBIOME
SUPPORT



9

UPCYCLED
INGREDIENTS



10

IMPRESSIVE
CHICKPEA

TOP TRENDS

Plant-based proteins are trending as consumers seek to improve their overall health and the health of the planet. Burger substitutes are nearly commonplace leading to the strong growth of poultry and pork substitutes. Regional flavors have more potential than is being realized. While products have looked to regional barbecue styles and are currently exploring regional pizza, there are many product categories that are yet untapped for regional exploration. Nostalgia provides consumers a sense of comfort. Adding a unique twist to familiar flavor can make consumers feel safe and secure.

PLANT
BASED
ALTERNATIVES

COMFORT
FOODS

REGIONALLY,
LOCALLY
SOURCED

HEALTHY
INDULGENCE

PERSONALIZED
NUTRITION

ON-
THE-GO
PORTABLE
SNACKS

MODERN
NOSTALGIA



TOP BEVERAGE TRENDS 2021

Consumer focus and interest in health consciousness align with preferred flavor choice trends prioritizing “fresher” fruit flavors like citrus. Consumers will be looking for more functional drinks that claim to help people focus, relax and relieve emotional health concerns. Immunity will be on everyone’s radar as people focus on keeping a strong immune system throughout the pandemic. Drink brands can look for functionality from botanicals, and taste credentials in milk alternatives. Rather than abstaining from alcohol all together, many consumers continue to be more interested in enjoying alcoholic beverages, but in smaller portions.

LESS
SWEET
FLAVORS

PREMIUM
COCKTAILS

IMMUNITY
CLAIMS

GUT
HEALTH
CLAIMS

LOW
ALCOHOL

PLANT
FORWARD

44%

OF U.S. ADULTS
ARE INTERESTED
IN BEVERAGES
WITH LOW OR
REDUCED SUGAR.

58%

OF CONSUMERS
CHOOSE CITRUS
AS A FLAVOR FOR
NON-ALCOHOLIC
BEVERAGES.

25%

INCREASE IN
MENU MENTIONS
FOR PREMIUM
COCKTAILS.*

109%

INCREASE IN
MENU MENTIONS
FOR KOMBUCHA.**

* Q1 2017 - Q2 2020
** Q2 2017 - Q2 2020

DAIRY AND DAIRY ALTERNATIVES

Sweet flavor profiles dominate the product landscape and position flavored milks as a treat or dessert opportunity. A third of consumers think dessert-inspired flavors make dairy feel more indulgent. Consumers are becoming interested in spicier ingredients and those that are aligned with healthy reputations like turmeric and cinnamon.

CONSUMER EXPERIENCE AND INTEREST

Sweet

- AÇAÍ
- CARDAMOM
- COCONUT
- DULCE DE LECHE
- ELDERFLOWER
- LAVENDER
- LEMON
- MANGO
- MAPLE
- MATCHA
- TURMERIC
- YUZU

Savory

- AVOCADO
- BARBECUE
- CARAMELIZED ONION
- CHILI PEPPER
- CUCUMBER
- HORSERADISH
- OLIVE
- PESTO
- ROSEMARY
- SAFFRON
- TAHINI
- TOMATO AND BASIL

DIRECTIONAL GROWTH FLAVORS

- CANDY BAR
- COOKIES AND CREAM
- HORCHATA
- ORANGE CREAM

1086%

INCREASE IN
NON DAIRY
INGREDIENT CLAIM
MENU INCIDENCE.**

* Consumer Experience and Interest
** Q2 2017 - Q2 2020

51%*

DULCE DE LECHE

22%*

YUZU

48%*

TOMATO AND BASIL

43%*

CARAMELIZED
ONION

TOP COFFEE FLAVOR TRENDS

- TURMERIC
- CINNAMON
- WHITE CHOCOLATE
- VANILLA
- CITRUS
- ROASTED AND TOASTED COCONUT
- MAPLE AND PECAN
- HAZELNUT
- CHOCOLATE TRUFFLE
- RASPBERRY
- SALTED CARAMEL
- MOCHA



ALMOND, COCONUT,
OAT AND SOY
TOP ALTERNATIVE DAIRY
FOR CREAMERS.

50%

OF ADULTS
ARE INTERESTED
IN OAT MILK.



365%

INCREASE IN TURMERIC
NEW LAUNCHES IN
COFFEE, TEA AND RTD.*



151%

INCREASE IN
WHITE CHOCOLATE
MENU MENTIONS.**



61%

INCREASE IN
SOUTHERN SWEET TEA
FLAVOR ON U.S. MENUS.***



313%

INCREASE IN WILD BERRY
NEW LAUNCHES IN
COFFEE, TEA AND RTD.*

TOP TEA FLAVOR TRENDS

- CHAI TEA
- BERGAMOT ORANGE
- SOUTHERN SWEET TEA
- PEACH PASSION FRUIT
- MINT HIBISCUS
- JASMINE
- LEMON
- MANGO
- PEPPERMINT
- HONEY
- SWEET TEA
- KOMBUCHA
- WILD BERRY
- HIBISCUS/ROSELLE
- CITRUS
- GINGER & TURMERIC
- BLUEBERRY

JUICE TRENDS

TURMERIC **LEMON** LIME
POMELO CELERY JUICE
CAYENNE **GINGER**



57%

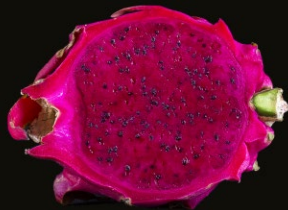
INCREASE IN
MENU MENTIONS FOR
AGUA FRESCAS.***

* Oct 2017 - Sept 2020
** Q2 2017 - Q2 2020
*** Q1 2017 - Q1 2020

COCKTAIL AND MOCKTAILS

CONSUMER EXPERIENCE AND INTEREST

- AÇAÍ
- ALMOND
- BASIL
- BLACK CURRANT
- BLOOD ORANGE
- CHILI PEPPER
- DRAGONFRUIT
- EARL GREY
- ELDERFLOWER
- HIBISCUS
- TURMERIC
- YUZU



51%*
DRAGONFRUIT



GROWING FLAVORS

COCONUT CUCUMBER
& MANGO 326%**
YUZU & STRAWBERRY

Alcohol flavor trends are often used by sports nutrition companies when looking for pre-workout beverage flavors.

SPORTS NUTRITION BEVERAGES

GROWING FLAVORS

BROWNIE 539%**
COOKIE DOUGH BIRTHDAY CAKE
HONEY NUT CRUNCH 219%**
S'MORES MARSHMALLOW

DIRECTIONAL GROWTH FLAVORS

- APPLE CRISP
- MAPLE PECAN
- TRES LECHES
- CAPPUCCINO
- PINEAPPLE UPSIDE DOWN CAKE
- VANILLA BEAN

* Consumer Experience and Interest

** Oct 2017 - Sept 2020

*** New Launches with Functional Claims Oct 2017 - Sept 2020

TOP FOOD TRENDS 2021

As consumers remain leery of returning to on premise dining, and cooking fatigue builds, at home meal routines can use a shakeup. Appeal to consumers seeking more international flavors through unique flavor innovation that offers a mix of classic and trending cuisine trends.

Half of consumers seek food and drinks that boost energy suggesting that the food launches with functional claims are heading in the right direction, leading with energy. With snacks, bars and yogurt leading the way on functional claims, widening the lens to highlight inherent benefits (such as naturally occurring probiotics and minerals) can invite acceptance of a broader array of foods into the functional food fold. Convenient products will also need to adapt to extended home-centered lifestyles. Delivery meal kit purchases will highlight weekday shortcuts and elevating at-home celebrations.

HOME
COOKING

IMMUNITY

GUT
HEALTH

SNACKS

DELIVERY
AND TAKE-OUT
FRIENDLY

DIRECTIONALLY FAST-GROWING FLAVORS IN NEW U.S. FOOD*

- APRICOT
- ASIAGO
- BIRTHDAY CAKE
- BLACKBERRY
- BLACKCURRANT/
CASSIS
- BLACK GARLIC
- CARDAMOM
- COFFEE/
CAPPUCCINO
- COOKIES &
CREAM
- HABANERO
- LAVENDER
- LEMONGRASS
- MAPLE
- OREGANO
- PINK HIMALAYAN
SALT
- ROSEMARY
- SAGE
- TRUFFLE
- VANILLA BEAN
- WHISKEY/BOURBON

DIRECTIONALLY FAST-GROWING FLAVORS ON U.S. MENUS**

- ACHIOTE
- ADOBO SEASONING
- AGAVE
- AJI AMARILLO
- BLACK SESAME SEED
- BULGOGI
- CALABRIAN CHILI
- CILANTRO
- CHIMICHURRI
- FIRE-ROASTED
TOMATO
- FURIKAKE
- HARISSA
- HATCH GREEN CHILI
- LYCHEE
- KIMCHI
- MISO
- MOLE
- MOJO
- PASSION FRUIT
- PIRI PIRI
- PONZU
- ROASTED-GARLIC
- SAMBAL
- SESAME SEED
- SHALLOT
- SHISO
- SHOYU SOY SAUCE
- TAMARI
- TOGARASHI
- TOMATILLO
- TRES LECHES
- TRUFFLE
- TURMERIC
- WHISKEY
- ZA'ATAR

* Product Launches, July 2018 - Sept 2020
** Q4 2016 - 2019





INTERNATIONAL CUISINE

Up and coming local flavor profiles from Asian cuisines are gaining traction, like furikake, togarashi, and miso which offer depth and complexity to new categories.

Highlighting food preparation like barbacoa (meat steam cooked in an underground oven until tender and succulent) continues to intrigue consumers when selecting an entrée choice. Flavor fusions from Middle East and African cuisines are aligning with consumers—particularly Moroccan cuisine. Creating fusion products by incorporating spice blends like harissa in unconventional places like empanadas, sauces and soups creates contemporary comfort at the center of innovation.

GROWING FLAVORS

MISO CARIBBEAN
BARBACOA 221%*
 BLACK SESAME
 KOREAN BBQ HARISSA
 MOROCCAN **JAPANESE** 141%*

DIRECTIONAL GROWTH FLAVORS

- AJI AMARILLO
- ANCHO PEPPERS
- BULGOGI
- CALABRIAN CHILI
- CHIMICHURRI
- CHURRO
- ETHIOPIAN CUISINE
- FURIKAKE
- LATIN FLAVORS
- MOLE
- PIRI PIRI
- QUESO
- SHISO
- SMOKY POBLANO
- TOGARASHI



382%

INCREASE IN NEW
 PRODUCT LAUNCHES
 FOR KIMCHI.**



15%

INCREASE IN MISO
 MENTIONED ON
 MENUS.**

FERMENTED FLAVOR TRENDS

- BLACK GARLIC
- KIMCHI
- MISO
- SAUERKRAUT
- TAMARI

* New Launches with International Flavor, Oct 2017 - Sept 2020
 ** Q1 2017 - Q2 2020

PROTEIN AND MEAT ALTERNATIVES

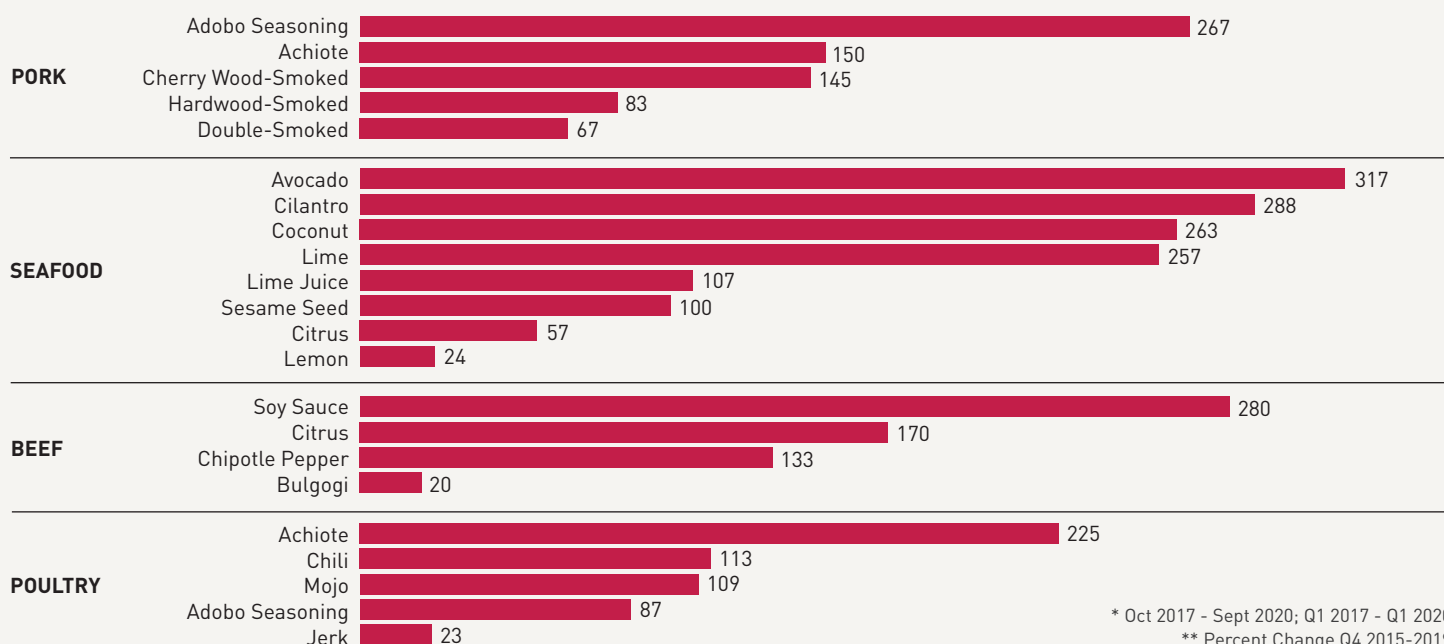
Latin American and Southeast Asian inspired flavors are growing across protein categories on U.S. restaurant menus, featuring bright citrus flavors and flavorful seasoning blends like adobo, sesame, soy and bulgogi. In the pork category, flavors like cherry wood and double smoked showcase the artisan craft of curing meat.

Emerging flavors display a strong interest from meat-alternative consumers so pairing international flavors like lemongrass and za'atar and tikka masala with these protein sources can keep consumers engaged.

CONSUMER EXPERIENCE AND INTEREST



GROWTH OF PROTEIN FLAVORS ON U.S. MENUS**



1075%

INCREASE IN KELP AS AN INGREDIENT IN FOOD AND DRINK PRODUCTS WITH "PLANT-BASED" IN THE DESCRIPTION.*

INGREDIENTS TRENDING IN PLANT PROTEIN ALTERNATIVES

- CAULIFLOWER
- CHANTARELLE
- CORDYCEPS
- KELP
- MAITAKE
- OYSTER MUSHROOM
- SEAWEED

* Oct 2017 - Sept 2020; Q1 2017 - Q1 2020
** Percent Change Q4 2015-2019

SAUCES, DIPS AND DRESSINGS

Although most consumers reach for familiar flavors of dips and sauces, there is room to make the mainstream more diverse, flavorful and unique. Chimichurri offers an adventurous opportunity to explore Latin American cuisine at home and 38% of consumers show interest in this. The sauce format of chimichurri lends itself to a variety of uses—such as a topping, dip or marinade—and adds fresh flavor to the center of the plate or a prepared entrée.

CONSUMER EXPERIENCE AND INTEREST

MANGO HARISSA BULGOGI
ZAATAR **WASABI** 48% MISO
APPLE CIDER VINEGAR TOGARASHI
Piri Piri **CHIMICHURRI** 44%
NASHVILLE GOCHUJANG
HOT



DIABLO SAUCE
INCREASE IN
MENU MENTIONS



WHITE CHEDDAR
INCREASE IN
MENU MENTIONS



SALSA RANCHERA
INCREASE IN
MENU MENTIONS



HARISSA
INCREASE IN
MENU MENTIONS



CITRUS
INCREASE IN
NEW LAUNCHES



MANDARIN ORANGE
INCREASE IN
MENU MENTIONS

GROWING SAUCE FLAVORS

- BLACK SAUCE(HOISON)
- DIABLO SAUCE
- EEL SAUCE
- GENOAN PESTO
- MORNAY
- PINEAPPLE
- ROMESCO
- WHITE CHEDDAR

GROWING DIP FLAVORS

- BUFFALO DIP
- HARISSA
- LEMONGRASS
- OREGANO
- ROSEMARY
- SAGE
- SALSA RANCHERA
- SALSA ROJA
- SALSA VERDE
- TRUFFLE MUSHROOM

GROWING DRESSING FLAVORS

- APRICOT
- CITRUS
- JALAPEÑO
- MANDARIN ORANGE
- MANGO
- MAPLE
- POMEGRANATE

* Q4 2016 - Q4 2019
** Oct 2017 - Sept 2020
*** Q1 2017 - Q1 2020

SEASONINGS

The emergence and rising popularity of both Latin and Asian cuisines has given consumers the opportunity to explore the world of spicy and umami flavors like ancho chili, sesame and shiitake mushroom. One exception to this trend is sakura (cherry blossom), which is just breaking into the U.S. menu scene, and has elicited interest as an emerging sweet flavor. Japanese cuisine coupled with emerging consumer interest in floral flavors is likely at the core of sakura growth.



CONSUMER EXPERIENCE AND INTEREST

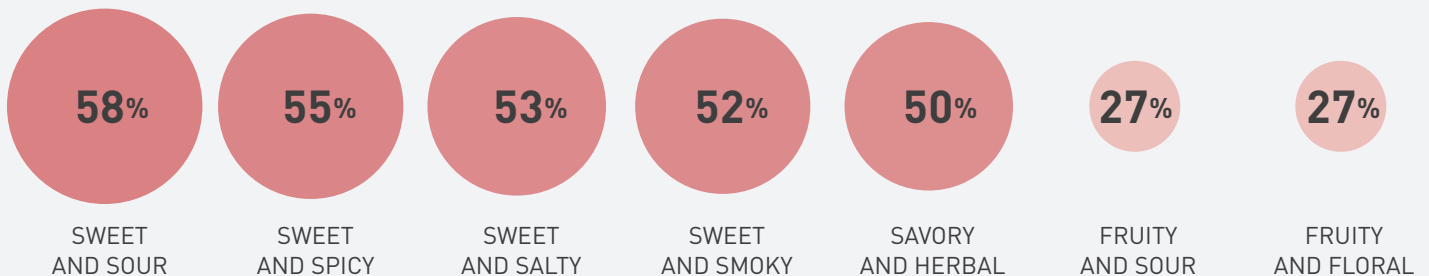
MUSHROOM DILL
TAHINI **ANCHO CHILI** 46%
SESAME SEED FIG
CHERRY BLOSSOM 54%
KEY LIME ZA'ATAR CHIVE
POBLANO PEPPER BEER



DIRECTIONALLY FAST-GROWING FLAVORS

- ASIAGO
- BLACK GARLIC
- BOURBON
- CARDAMOM
- CITRUS
- HABANERO
- LEMONGRASS
- OREGANO
- PINK HIMALAYAN SALT
- ROSEMARY
- SAGE
- TRUFFLE

PREFERENCE FOR FLAVOR COMBINATIONS ON RESTAURANT MENUS



BAKERY AND DESSERTS

Consumer access to purchasing bakery favorites at local bakeries has been limited by COVID-19. Offering more international bakery options for at-home consumption—like churro, dulce de leche or matcha—can appeal to consumers looking for internationally inspired options while travel is limited.

CONSUMER EXPERIENCE AND INTEREST

- | | | |
|------------------|---------------|------------------|
| • AÇAÍ | • ELDERFLOWER | • MARSHMALLOW |
| • BLOOD ORANGE | • ESPRESSO | • MATCHA |
| • BOURBON | • GREEN TEA | • OLIVE OIL |
| • CAYENNE | • HONEY | • PISTACHIO |
| • CHAI | • LAVENDER | • ROSE |
| • CHURRO | • LEMON | • RUBY CHOCOLATE |
| • DARK CHOCOLATE | • LYCHEE | • S'MORES |
| • DULCE DE LECHE | • MAPLE | • YUZU |



GROWTH IN SPICY FLAVORED BAKED GOODS. JALAPEÑOS (88%) LEAD SPICY INGREDIENTS AND BOTH TOMATO (18%) AND SAUSAGE (11%) HAVE GROWN AS FLAVORS.**

SNACKS

Flavor is the most important factor when choosing a snack. BBQ is a go-to flavor in snacks and is the perfect base to be paired with flavors such as bourbon. Unique flavor combinations such as spicy & sweet like mango & habanero or sour & spicy like gochujang have potential to drive excitement in established as well as emerging snack segments.

CONSUMER EXPERIENCE AND INTEREST

- | | | |
|----------------|-----------------|---------------|
| • AVOCADO | • HABANERO | • ROSEMARY |
| • BASIL | • HARISSA | • SRIRACHA |
| • BBQ | • KIMCHI | • SWEET CHILI |
| • BOURBON | • LEMONGRASS | • TAMARIND |
| • CHIMICHURRI | • MANGO | • TOGARASHI |
| • ELDERFLOWER | • MATCHA | • TURMERIC |
| • FURIKAKE | • NASHVILLE HOT | • WASABI |
| • GARAM MASALA | • PICKLE | • ZA'ATAR |
| • GOCHUJANG | • PUMPKIN | |

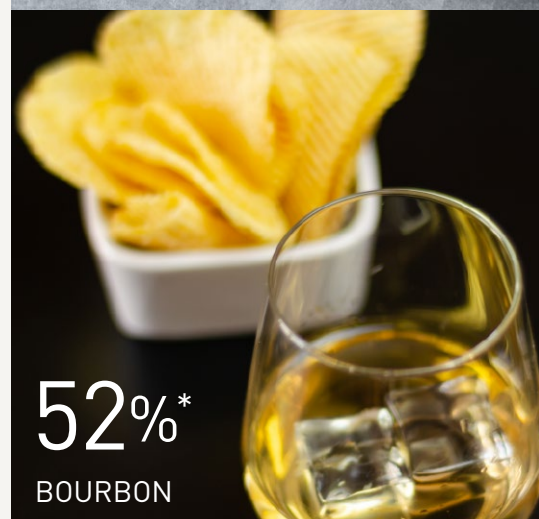
* Consumer Experience and Interest
** Q2 2017 - Q2 2020



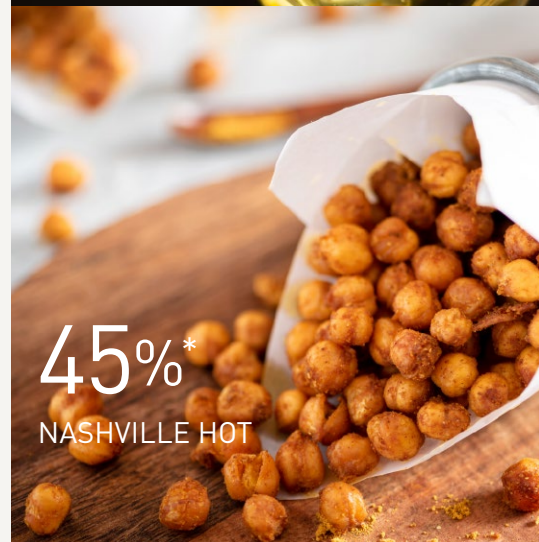
64%*
CHURRO



57%*
BLOOD ORANGE



52%*
BOURBON



45%*
NASHVILLE HOT



Whether you found a directional trend interesting, a brand new idea was initiated or are ready to build off of an existing formulation, our team is ready to collaborate and create a custom solution to meet your need.

Give us a call and take your product to the next level of flavor.

DEVELOPMENT CAPABILITIES

Liquid Flavors: Oil Soluble Water Soluble Reaction Emulsion Extract

Powder Flavors: Plated Spray-dried Vacuum-dried

Paste Flavors: Encapsulates Suspensions Viscous Solutions Thermal Processing

AVAILABLE IN

Organic Natural Gluten Free Vegan Kosher Halal Non-GMO
Clean-Label Cost Reduction Retail Compliant Natural & Artificial Blends

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