Building on Trends in Citrus in North America
ICBC - 2014
FlavourVision™
2012 Beverage Trends

Rooted and Real

Three's Company: Combining fruit flavors in a symphony of taste is no longer new. Getting the combination right and making sure each flavor comes through strong is secret to these drinks. Nothing more than a good branded punch.

Orange you glad... I did! Citrus again. This time, gin will take a back seat to new exciting named varieties of Or, Pummelo, Kumquat, and Tang. Colored, distinctive versions of special citrus produce have heightened consumer demand for various citrus fruit flavors.

Lemonade + 4! The top pick from 2011, Lemonade evolves into a different space in 2012 where it will take shape as a supporting flavor for a variety of flavorful combinations. Expect to see a full range of remixed combinations from the traditional Strawberry to new concepts like Tropikal Lemonade.

Rooted and Real

The Art of the Drink: Creativity is not just for Baristas or Mixologists anymore. The Art of making drinks is extending way beyond Cocktails and mixing premium infused spirits. Is Carobolada, or Latte and Spirits, it is clear, today, that there is huge demand for homemade tea blends and DIY drinks that keep the trend alive.

On the Fringe

Well-Being

As is for Apples: The clean crisp profiles of apples are making their way onto the scene in beverages, once only seen at your local apple orchard. Beyond just Green or Red, varieties like Fuji, McIntosh, Golden Delicious, and Honey Crisp are all profiles consumers want in their drinks.

FLEX-ABILITY

Perfect Fit: How do you appeal to the individual... that is the question every beverage brand is trying to answer. This trend is materializing in customizable drink fountain, pocket-sized concentrated flavors, restaurant-sized holiday drinks, It’s the idea that the bigger, you have to narrow your focus and you will be rewarded with loyal consumers.

FLEX-ABILITY

Flex-Ability

Herb & Spice... making a nice addition to tradition fruit flavors. Adding herb and spices to beverages is gaining momentum. These nuances bring complex and unique qualities to beverages and their consumers are enjoying spicy punches.

Mango! Mango is well poised to be the “flavor of the year” 2012. This worldwide flavor has long been relegated to the position behind long-time favorites like Peach and Pineapple yet in 2012, you will see mango emerge as both a standalone flavor as well as the lead in a whole host of combinations.

DESIRE AND DELIGHT

Hot is Hot, Frozen is C. From Coffee to Tea, Apple to Hot Chocolate, hot and cold drinks are everywhere. In food service, these classics will find their way into homes, The antitheses of Hot Frozen: Blended, Ice, Slush, and Smoothies. Getting these come through these applications is the secret to success.

On the Fringe

DESIRE AND DELIGHT

Sweet Somewhere: Spirit flavors aren’t just for alcoholic beverages anymore. Rum, Whiskey, Tequila, and Gin flavors are showing up in more applications to bring complexity and sophistication to liquid profiles. Some will be called out, others in the background, but bringing a spirited experience to non-alcoholic drinks will revolutionize consumer experiences.
FlavourVision™
2013 Beverage Trends

**Let Them Drink Cake**
Sweet and indulgent flavors are all the rage. In food service and at home, consumers still love Vanilla, Chocolate, and Caramel. They may begin to crave and experiment even more indulgent profiles, sweet in a beverage form.

**Roadside Market**
The fresh market is finding its way into beverages year round. Consumers are looking for fresh from the garden or market taste. There will be an increased popularity of Herbs, Veggies, Fish and Nature in both alcoholic and non-alcoholic beverages.

**Build-A-Berry**
Consumers love berries! Strawberry, Raspberry, Blueberry and Mixed berry profiles will continue to be popular with consumers. Future trends for berries is in providing consumers with the berry flavors they know and love. Maybe it’s the fruit flavor or its the profile that’s from their favorite childhood treat.

**Bringing Back the Classics**
The art of the drink continues to thrive in both cocktail bars and restaurants. Craftsmanship is driving mixologists to create drinks of the future. Looking at a nation of cocktails from 1950-1960 provide the perfect recipe for re-inventing the future.

**Limelight**
Lemonade has been a top flavor trend in the last few years, as Lemonade continues to stay the course in terms of popularity we see a new star shining with Lime moving to the forefront.

**From Your Backyard**
For years consumers have grown fruit trees in their own back yards. So, as they continue to seek out these mainstream profiles, flavors like Orange, Cherry, Peach and Pear will soar in popularity. They will be popular as singular flavors, as well as perfect for pairing with more up and coming flavors like Apricot or Plum.

**Two Tickets to Paradise**
In 2012, Mango was the tropical standout. As it continues to gain momentum in 2013, anticipate more tropical fruits to resonate with consumers. Especially when it comes to two or even three flavors used in combination to drive complexity and uniqueness in beverages.

**Espresso Yourself**
Coffee is moving to the forefront of consumers’ minds. Its popularity is soaring both in food service and in retail. The sophistication of the consumer palette has created a demand for different coffee profiles, as well as great-tasting flavors for coffee.

**It's Getting Hot In Here**
Spices add complexity and uniqueness to beverages. As profiles like ginger and cinnamon increase in consumption, there is a movement towards warm and exotic spices.
LIME Cola Sparkling Water Kaffir Garnish
Excited
Refreshing Cherry Adults
Lemon Limade
Sparkling Water Beer Alcohol Kaffir Blackberry
Supply Challenges Combination Flavor Adults
Restaurant Menus
Squeeze Key Lime
Margarita Strawberry Vodka Cola
Mexican Fresh Cut
Anticipation Mixology
Mojito Lemon Squeeze Mexican Supply Challenges
Strawberry Squeeze Kaffir
Mojito Anticipation Mixology
Lime LIME Combination Flavor Adults
Restaurant Menus
Squeeze Key Lime
Lemon Combinations

Lime – Alcohol

Orange Varietals: Blood Orange, Tangerine, Mandarin

Lime – Non-Alcohol

Grapefruit

Orange Varietals: Tangelo, Clementine, Kumquat

Pummelo

THE TREND CONTINUUM
FOCUS GROUPS

ON-LINE CONSUMER SURVEY
FLAVOR INTEREST

Citrus: 64%
Berry: 53%
Chocolate: 54%
Vanilla: 38%
Caramel: 40%
Tropical: 48%

- Not At All Interested
- Not Very Interested
- Somewhat Interested
- Very Interested
- Extremely Interested
CITRUS CONSUMPTION FREQUENCY

- More than once a day: 23%
- Once a day: 30%
- Several times/week: 36%
- Once per week: 6%
- Few times/month: 5%
- Less often once a month: 0%
CITRUS CONSUMPTION TRENDS

- Don't consume this flavor
- Less Often
- The Same Amount
- More Often

Lemon
- 2% Don't consume
- 5% Less Often
- 60% The Same Amount
- 32% More Often

Lime
- 1% Don't consume
- 8% Less Often
- 63% The Same Amount
- 32% More Often

Orange
- 1% Don't consume
- 15% Less Often
- 51% The Same Amount
- 17% More Often

Tangerine
- 8% Don't consume
- 19% Less Often
- 44% The Same Amount
- 24% More Often

Grapefruit
- 5% Don't consume
- 16% Less Often
- 38% The Same Amount
- 20% More Often

Blood Orange
- 1% Don't consume
- 32% Less Often
- 9% The Same Amount
- 38% More Often

Clementine
- 2% Don't consume
- 32% Less Often
- 11% The Same Amount
- 43% More Often

Mandarin
- 1% Don't consume
- 13% Less Often
- 13% The Same Amount
- 15% More Often

Givaudan
FLAVOR OBSERVATION TRENDS

- Not Sure
- Seen Less of This Flavor
- Seen About The Same Amount of This Flavor
- Seen More Of This Flavor

Lemon: 1% Not Sure, 46% Seen Less of, 32% Seen About, 23% Seen More
Lime: 4% Not Sure, 43% Seen Less of, 14% Seen About, 19% Seen More
Orange: 1% Not Sure, 52% Seen Less of, 23% Seen About, 27% Seen More
Tangerine: 9% Not Sure, 20% Seen Less of, 47% Seen About, 24% Seen More
Grapefruit: 4% Not Sure, 44% Seen Less of, 30% Seen About, 27% Seen More
Blood Orange: 13% Not Sure, 24% Seen Less of, 36% Seen About, 36% Seen More
Clementine: 21% Not Sure, 23% Seen Less of, 36% Seen About, 19% Seen More
Mandarin: 9% Not Sure, 20% Seen Less of, 42% Seen About, 29% Seen More
WHICH FLAVORS WOULD YOU LIKE TO SEE MORE IN THE NEXT YEAR?

- **Strongly Disagree**
  - Lemon: 1% Strongly Disagree, 6% Disagree, 35% Neither Agree nor Disagree, 39% Agree, 20% Strongly Agree
  - Lime: 1% Strongly Disagree, 6% Disagree, 32% Neither Agree nor Disagree, 41% Agree, 19% Strongly Agree
  - Orange: 1% Strongly Disagree, 4% Disagree, 32% Neither Agree nor Disagree, 42% Agree, 21% Strongly Agree
  - Tangerine: 0% Strongly Disagree, 4% Disagree, 39% Neither Agree nor Disagree, 33% Agree, 23% Strongly Agree
  - Grapefruit: 9% Strongly Disagree, 12% Disagree, 25% Neither Agree nor Disagree, 32% Agree, 21% Strongly Agree
  - Blood Orange: 3% Strongly Disagree, 8% Disagree, 22% Neither Agree nor Disagree, 38% Agree, 28% Strongly Agree
  - Clementine: 4% Strongly Disagree, 6% Disagree, 30% Neither Agree nor Disagree, 27% Agree, 33% Strongly Agree
  - Mandarin: 1% Strongly Disagree, 4% Disagree, 4% Neither Agree nor Disagree, 9% Agree, 25% Strongly Agree

- **Somewhat Disagree**
  - Lemon: 20% Strongly Disagree, 6% Disagree, 32% Neither Agree nor Disagree, 35% Agree, 39% Strongly Agree
  - Lime: 19% Strongly Disagree, 6% Disagree, 32% Neither Agree nor Disagree, 41% Agree, 21% Strongly Agree
  - Orange: 21% Strongly Disagree, 4% Disagree, 32% Neither Agree nor Disagree, 42% Agree, 23% Strongly Agree
  - Tangerine: 12% Strongly Disagree, 3% Disagree, 25% Neither Agree nor Disagree, 33% Agree, 39% Strongly Agree
  - Grapefruit: 22% Strongly Disagree, 8% Disagree, 28% Neither Agree nor Disagree, 38% Agree, 32% Strongly Agree
  - Blood Orange: 28% Strongly Disagree, 8% Disagree, 22% Neither Agree nor Disagree, 38% Agree, 33% Strongly Agree
  - Clementine: 30% Strongly Disagree, 6% Disagree, 33% Neither Agree nor Disagree, 27% Agree, 37% Strongly Agree
  - Mandarin: 25% Strongly Disagree, 4% Disagree, 33% Neither Agree nor Disagree, 33% Agree, 33% Strongly Agree

- **Neither Agree nor Disagree**
  - Lemon: 35% Strongly Disagree, 32% Disagree, 32% Neither Agree nor Disagree, 35% Agree, 39% Strongly Agree
  - Lime: 32% Strongly Disagree, 32% Disagree, 32% Neither Agree nor Disagree, 41% Agree, 41% Strongly Agree
  - Orange: 32% Strongly Disagree, 32% Disagree, 32% Neither Agree nor Disagree, 42% Agree, 42% Strongly Agree
  - Tangerine: 39% Strongly Disagree, 23% Disagree, 25% Neither Agree nor Disagree, 33% Agree, 33% Strongly Agree
  - Grapefruit: 25% Strongly Disagree, 21% Disagree, 28% Neither Agree nor Disagree, 38% Agree, 38% Strongly Agree
  - Blood Orange: 28% Strongly Disagree, 22% Disagree, 22% Neither Agree nor Disagree, 38% Agree, 38% Strongly Agree
  - Clementine: 33% Strongly Disagree, 33% Disagree, 33% Neither Agree nor Disagree, 27% Agree, 27% Strongly Agree
  - Mandarin: 37% Strongly Disagree, 33% Disagree, 33% Neither Agree nor Disagree, 33% Agree, 33% Strongly Agree

- **Somewhat Agree**
  - Lemon: 6% Strongly Disagree, 1% Disagree, 41% Neither Agree nor Disagree, 41% Agree, 41% Strongly Agree
  - Lime: 6% Strongly Disagree, 1% Disagree, 41% Neither Agree nor Disagree, 41% Agree, 41% Strongly Agree
  - Orange: 4% Strongly Disagree, 1% Disagree, 42% Neither Agree nor Disagree, 42% Agree, 42% Strongly Agree
  - Tangerine: 4% Strongly Disagree, 1% Disagree, 33% Neither Agree nor Disagree, 33% Agree, 33% Strongly Agree
  - Grapefruit: 9% Strongly Disagree, 3% Disagree, 25% Neither Agree nor Disagree, 32% Agree, 32% Strongly Agree
  - Blood Orange: 8% Strongly Disagree, 2% Disagree, 22% Neither Agree nor Disagree, 28% Agree, 28% Strongly Agree
  - Clementine: 6% Strongly Disagree, 2% Disagree, 33% Neither Agree nor Disagree, 27% Agree, 27% Strongly Agree
  - Mandarin: 4% Strongly Disagree, 1% Disagree, 33% Neither Agree nor Disagree, 33% Agree, 33% Strongly Agree

- **Strongly Agree**
  - Lemon: 1% Strongly Disagree, 1% Disagree, 1% Neither Agree nor Disagree, 99% Agree
  - Lime: 1% Strongly Disagree, 1% Disagree, 1% Neither Agree nor Disagree, 99% Agree
  - Orange: 1% Strongly Disagree, 1% Disagree, 1% Neither Agree nor Disagree, 99% Agree
  - Tangerine: 0% Strongly Disagree, 0% Disagree, 0% Neither Agree nor Disagree, 100% Agree
  - Grapefruit: 3% Strongly Disagree, 3% Disagree, 3% Neither Agree nor Disagree, 93% Agree
  - Blood Orange: 2% Strongly Disagree, 2% Disagree, 2% Neither Agree nor Disagree, 95% Agree
  - Clementine: 4% Strongly Disagree, 4% Disagree, 4% Neither Agree nor Disagree, 90% Agree
  - Mandarin: 4% Strongly Disagree, 4% Disagree, 4% Neither Agree nor Disagree, 90% Agree
CITRUS FLAVOR VALUE PERCEPTION

- Flavors with varietal descriptors generally seen as more premium
PERCEIVED VALUE VERSUS “ORANGE”

- Cara Cara Orange: 51% Pay more, 44% Pay same, 5% Pay less
- Blood Orange: 51% Pay more, 43% Pay same, 6% Pay less
- Moro Blood Orange: 52% Pay more, 40% Pay same, 8% Pay less
- Navel Orange: 70% Pay more, 6% Pay same, 23% Pay less
- Mandarin: 59% Pay more, 6% Pay same, 4% Pay less
- Clementine: 57% Pay more, 9% Pay same, 33% Pay less
- Orangeade: 49% Pay more, 30% Pay same, 21% Pay less
- Tangerine: 66% Pay more, 6% Pay same, 6% Pay less
**THE TREND CONTINUUM**

**MAINSTREAM**
- Lemon Combinations
  - Lime - Alcohol
  - Lime - Non-Alcohol
  - Orange Varietals: Blood Orange, Tangerine, Mandarin

**EMERGING**
- Orange Varietals: Blood Orange, Tangerine, Mandarin
  - Lime - Non-Alcohol
  - Orange Varietals: Blood Orange, Tangerine, Mandarin

**ON THE FRINGE**
- Grapefruit Varietals: Tangelo, Clementine, Kumquat
  - Pummelo
  - Orange Varietals: Tangelo, Clementine, Kumquat
  - Grapefruit Varietals: Tangelo, Clementine, Kumquat
  - Pummelo

**Givaudan TasteEssentials™ citrus**
Givaudan

ENGAGING THE SENSES