



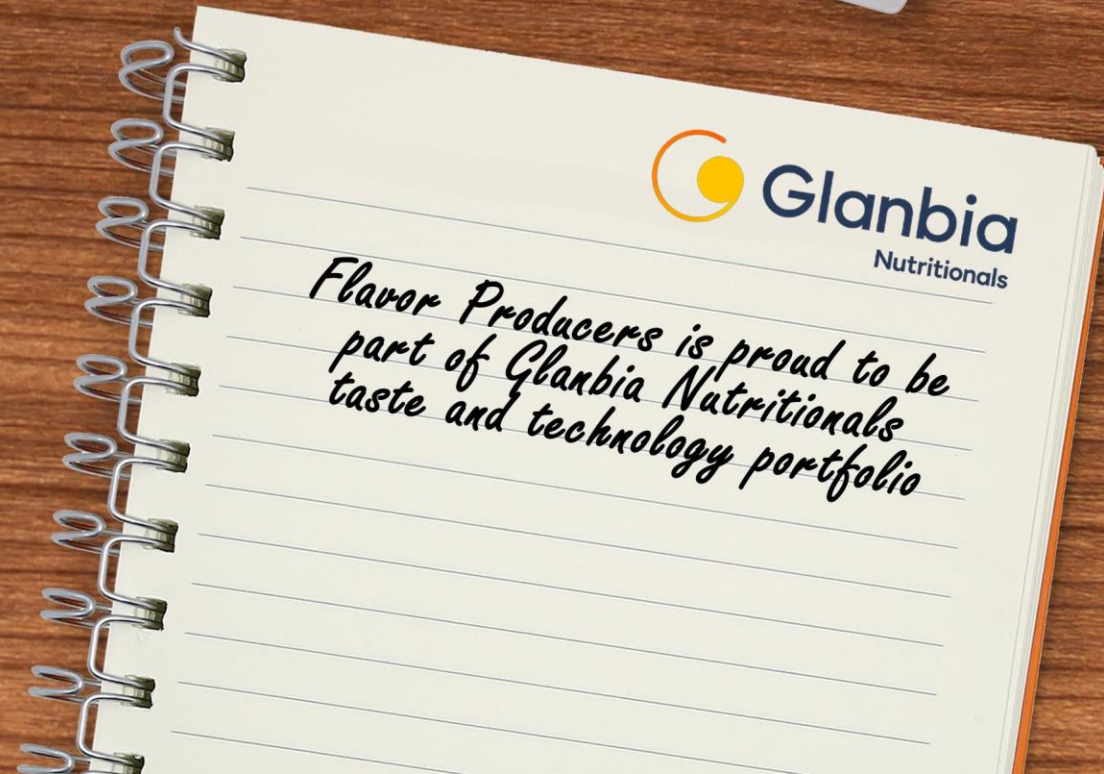
| TREND  FORECAST |





FLAVOR PRODUCERS
IN CONJUNCTION WITH
FOODAROM
Powered by Glanbia Nutritional

Glanbia
Nutritional



Glanbia
Nutritional

*Flavor Producers is proud to be
part of Glanbia Nutritional's
taste and technology portfolio*

The Flavor Producers Difference

For over four decades, Flavor Producers has been expertly crafting natural and organic flavors. We're renowned for our creative spirit, industry-leading order fulfillment, accessible minimums, and a wide array of delicious options, making it easy for our customers to succeed.



INDUSTRY LEADING ORDER FULFILLMENT

Best in Class
9 - Business Day Lead Time on Liquid MTO Deliveries

Rütz TrüBrüz
Unique Transparent Technology



OVER 5,000
Organic Certifiable
Flavors in our Library

OVER 40 YEARS
As Pioneers in Plant-based, Natural and Organic Flavors



INDUSTRY LEADING ORDER FULFILLMENT
Best in Class
MTO Deliveries



TRANSPARENT & TASTEFUL TECHNOLOGY INVESTMENTS
Supported by
Extensive Regulatory & Sensory Experience



100+ YEARS
of Plant-based Flavor, Extract & Essence Expertise



Leader in the Taste of Vanilla
from Natural extracts to
Organic Flavors



CALIFORNIA GROWN

Founded in Los Angeles in 1981, Flavor Producers expanded to 3 U.S. production sites and 3 R&D centers in North America

Peelz Oatz

Rooted in Nature Flavor
Delivery Options

Macrotrend Platform Overview

Next Instore embodies the macro trends that drive innovation and inspire new product development in the food and beverage industry. Flavor Producers specializes in creating natural, organic, and transparent flavor options, crafted to enhance the sensory experience and cater to consumer preferences.



A Better Us

We all strive for self improvement, so let's start with what sustains us. From organic offerings to clean and clear labels, sustainable packaging and beyond, the food industry is adapting to consumer demand for more personalized and sustainable options.



Borderless Taste

Taste has gotten bigger as the world has gotten smaller. Thanks to improvements in global communication along with consumers' access to exotic ingredients, cooking techniques and recipes, the flavors of the world are more available than ever.



A Growing Palate

Basic taste has grown up. Flavor profiles that were once avoided or thought too niche for large brands have surprised the market and found commercial success. Taste profiles like bitter, sour and umami, that were once an afterthought, are now part of the discussion in new product development.



Toying With Emotions

Online culture and social media has changed the way consumers are interacting with food. Food and drinks with emotional, visual or creative appeal are flooding social media, and in return expanding into foodservice and landing in retail spaces.



A Little Off-Base

As functionality continues to change the food and beverage landscape, it has carved an expanding path of consumer flavor interaction and acceptance. The rise of "alternative" products has evolved flavor masking into flavor mimicking finding flavor optimization to fill in the gaps of new products.

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2025 Forecast

2025 Trend: Weight of the World

The scales of consumers interest in functionality are shifting with continued conversations around weight loss drugs and mental health. This shift will bring new products and functional ingredients into the consumer zeitgeist, offering innovative solutions and addressing new gaps in nutrition.

- Consuming for Wellness
- Mental Health
- New Gaps In Nutrition
- Refocusing Priorities



Weight of the World: The Mind

Stress levels are rising, with **64% of consumers reporting increased stress**, up from 60% in 2023

3/4 of consumers say food has an impact on their mental well-being.

2/3 recognize that mental well-being impacts their food choices.

Source: 2024 IFIC International Food & Health Survey

Market Response

16% of all new supplement launches in 2024 (YTD) had a **Brain-Mood Health Claim**, making it the **top launched claim in all of supplements**.

If you include mental acuity into the mix that number jumps up to a staggering **25%**

Source: Innova New Product Database



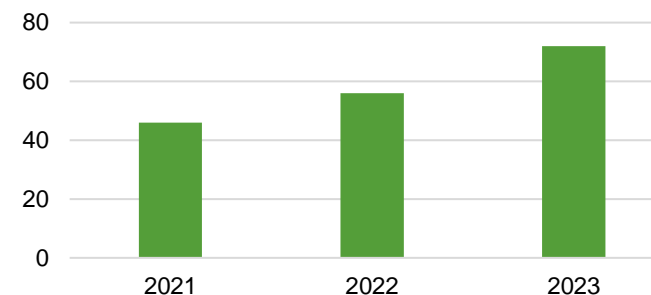
Mind Your Mood

Over the past three years, new beverage launches with a 'mood' claim have grown at a **25.1% compound annual growth rate (CAGR)**.

Source: Innova New Product Database



U.S. "Mood" Beverage Launches: Last 3 Complete Years



Recent 'Mood' Launches

Most mood-based beverages are found in the coffee, energy drink, and alcohol alternative markets.




Weight of the World: The Gap

54% of Americans followed a specific eating pattern diet in the last year

Of those who did, **high protein was the top eating pattern or diet at 20%.**



 **9%** of Americans say that they have used a prescription medication/drugs to lose weight in the past year.

 **22%** say that they have considered it.

Source: 2024 IFIC International Food & Health Survey

The fastest growing social conversations around functional health in food and beverage are centered around 'weight loss drugs'.

Fastest Rising Conversations Around Functional Health Weight Loss Drugs

 **347%**

Source: Tastewise YoY October 2024

While prescription-based weight loss may still seem unobtainable based-on cost alone. Generic forms have drastically cut the price, and pharmaceutical companies are putting pressure on insurance companies cover it for weight loss.

Nutritional Deficiencies: The Gap

Weight loss drugs that suppress appetite can lead to nutrient deficiencies if not paired with a balanced diet. **Protein is especially crucial** to preserve muscle mass and support tissue repair. Additionally, these drugs are often linked to deficiencies in Vitamin B12, Iron, Vitamin D, Calcium, Magnesium, and Folate.

Filling the Gap

Major brands are already stepping in to address this gap. Nestlé, for example, has launched a line of refrigerated meals under the Vital Pursuit™ brand and created the GLP-1 Nutrition website to link its products with GLP-1–friendly diets. **Expect more brands across the food, beverage, and supplement markets to capitalize on the needs created by prescription weight loss drugs.**



Nestlé Launched Vital Pursuit Meals™ Optimized for GLP-1 Diets

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2025 Forecast

2025 Trend: Taste Anarchy

Traditional boundaries of consumer flavor preferences are being rapidly redefined by social media and new consumer products. The blending of categories, expansion of botanicals and spices, and new ingredients and textures in the food and beverage space have created an unpredictable and dynamic flavor landscape.

- A Step Beyond Spicy
- Added Complexity
- Exclusivity & LTO
- New Experiences & Textures



Taste Anarchy: Flavor Unleashed

DIAGEO

Diageo, a world leader in alcoholic and alcohol-free alternative beverages, **highlighted Spicy & Umami flavors rising** in its 2024 Summer 'Flavour Forecast'.

Market Complexity

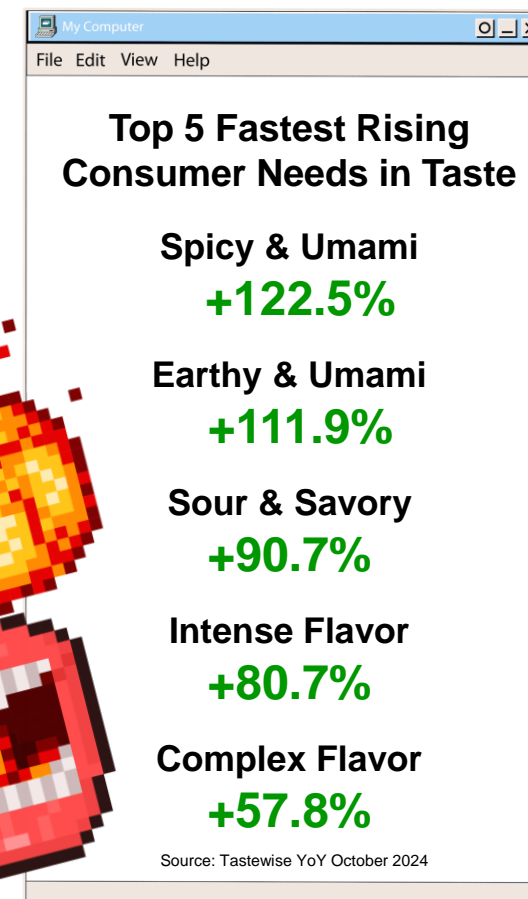
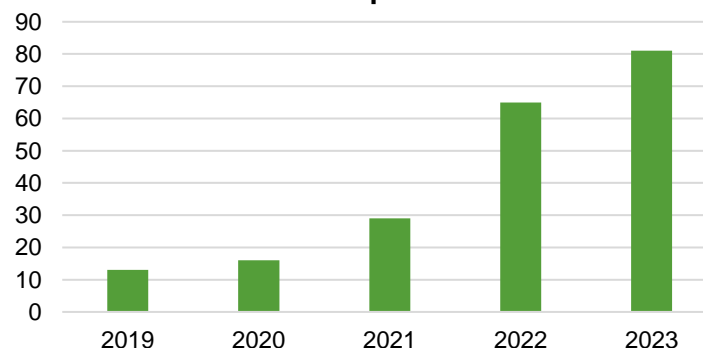
Over the past five years, the alcohol alternatives market has experienced a remarkable **57.99% compound annual growth rate (CAGR)** in product launches, highlighting the growing consumer demand for more complex offerings in the beverage space.

Source: Innova New Products Database



Our AI tool, Tastewise, is showing a rising demand for **spicy and umami flavors**, indicating a consumer desire for more complex flavors.

U.S. Alcoholic Beverage Launches Featuring a "No Alcohol" Claim: Last 5 Complete Years



Taste Anarchy: Market Examples

Savory and spice flavors taking a greater role in non-traditional applications.



Johnny Walker
Exclusive Umami



Jeni's
Bay Leaf Cheesecake
Miso Butterscotch Brownie



Nature Valley
Savory Nut Crunch Bars
Variety of Flavors



Dr. Pepper
Limited Edition
Hot Take (Spicy)



Graeter's
Skyline Chili Ice Cream

Source: Innova New Products Database

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2025 Forecast

2025 Trend: A Comfort Fusion

Fashion, entertainment, and food often follow cyclical patterns. By reviving elements from the past and incorporating global influences, new takes on classic comforts will continue to bring a spark of innovation into the food and beverage scene throughout the year.

- Collaborative Nostalgia
- Fantastically Flavorful
- Genre Blending
- Spotlight on Asia

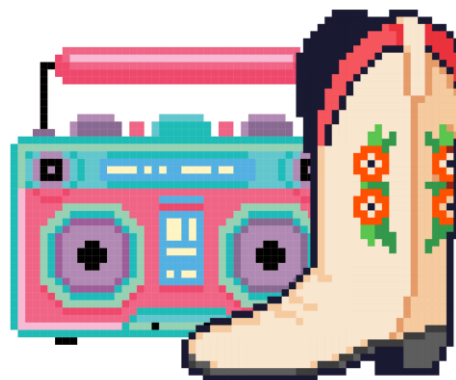


A Comfort Fusion: Ear, Nose & Throat

Food has long been intertwined with the fragrance industry, but recently, **this relationship has evolved to emphasize more complex savory aromas and culinary scents.** This fusion frequently evokes nostalgic culinary memories. Reflecting trends in the fragrance world, the food and **beverage market is increasingly incorporating herbal and botanical elements, along with a diverse array of international spices** to drive innovation.



Image Source: <https://www.vogue.com/article/fragrance-trends-2024>,
<https://www.bathandbodyworks.com>



Music is embracing fusion more than ever, with 2024 marking a breakthrough year for **unexpected genre crossovers producing some of the biggest hits.** Artists like Beyoncé, Post Malone, and Shaboozey pushed boundaries in the country genre, achieving major Billboard success and redefining the possibilities of genre blending.

Fusion cuisine has ebbs and flows within the culinary world but now it seems to be **latching on to more traditional nostalgic comfort foods.**

Crookie

A mixture of a cookie and a croissant is the fastest growing food in social media YoY.



Source: Tastewise YoY October 2024

Mixing Up Retail

Coca-Cola & Oreo swapped flavor profiles for a limited time release. Oreo is now the fastest rising flavor in social media conversations around soda with **433%** growth YoY.



Source: Tastewise YoY October 2024

Comfort Fusion: Market Examples

Familiar, nostalgic and fantasy flavors in unfamiliar formats, comfort fusion products can be found throughout the food and beverage space.



Liquid Death
Hot Fudge Sundae



Bobo's
Strawberry Lemonade
Stuffed Oat Bites



Premier Protein
Salted Caramel Popcorn



Cup Noodles
Campfire S'mores



Floura
Mango Lassi
Kombucha Bar



Ladd & Lass Brewing
Boba Buddies
Hard Milk Tea Seltzer

Source: Innova New Products Database

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2025 Trend: Clearer Vision

As artificial intelligence and augmented reality continue to advance, consumers will gain unprecedented access to rapid and comprehensive information about products. Insights regarding diets, nutritional labels, functionality, and sustainability will be just a quick search or even a glance away.

- Authentic & Sustainable Labels
- Functional Clarity
- Personalization
- Virtual Formulation



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A Clearer Vision: Heightened Vision

Consumers are paying more attention to **product labels**, and with more data and faster technology at their fingertips, **expect greater scrutiny of ingredients, nutrition, and sustainability.**



of global consumers say that they always look at ingredients of interest on product packaging.

Source: Innova Trends Survey 2024



CaloScanAI

is an app that tracks your food, macros, carbs, and fitness, helping you achieve your health goals.



Image Source: Google Play Store, CaloScanAI

Although **AI-powered diet apps** are **already available**, modern smartphones are now integrating AI directly into their operating systems, providing **faster and more seamless access than ever before.**

Tomorrow

AI will soon be able to delve more deeply into your personal data, analyzing factors such as your genetics, body composition, environment, and daily habits.

Near Future

Grocery shopping could soon be a visual data-driven experience thanks to streamlined advancements in augmented reality.



Image Source: <https://www.theverge.com>

2025 Trend Forecast: Macrotrends Alignment



A Better Us

- Consuming for Wellness
- Mental Health
- New Gaps In Nutrition
- Refocusing Priorities



A Little Off-Base

- Nutrient Density
- Protein Formulation
- Personalization
- Virtual Formulation



Toying With Emotions

- Collaborative Nostalgia
- Exclusivity
- Fantastically Flavorful
- Limited Time Offerings



A Growing Palate

- A Step Beyond Spicy
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Borderless Taste

- Exotic Flavors
- International Fusions
- New Experiences
- Spotlight on Asia

Let's Connect!



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