

# FALL/WINTER FLAVORS AND INGREDIENTS ON THE MENU – US – 2024

Restaurant operators can blend traditional comfort with creativity to grow enjoyment of and appreciation for flavors and ingredients during the fall/winter seasons.



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# Fall/Winter Flavors And Ingredients On The Menu – US – 2024

## This report looks at the following areas:

- Approach to fall and winter foodservice dining
- Interest in fall/winter menu innovation
- Experience and interest in fall and winter seasonal produce and fall/winter flavors and ingredients
- Interest in trial of fall/winter flavors in specific menu items
- Fall/winter foodservice attitudes
- Fall/winter menu innovation: what's now, near and next

## Overview

As the seasons change, 3 in 4 foodservice diners make some sort of change to their fall/winter dining experiences. Comfort food leads the change, as 43% of diners report ordering more comforting menu items. Despite PSLs and seasonal coffee beverages often dominating the seasonal menu space, dishes like soups and hot chocolate made with seasonal flavors and ingredients hold the most interest and speak to the need for comfort food menu variety and differentiation to meet cravings across regions, generations and genders.

Operators can lean into the comfort and tradition of the season while balancing creativity that delivers options for flavor exploration and unlocks new everyday occasions with fresh and lighter options. One avenue for creativity can be found in venturing down a road less



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taken and introducing consumers to fall/winter seasonal ingredients to grow their (currently smaller) seasonal produce repertoires.

When it comes to building seasonal flavor anticipation, some operators are getting creative and creating hype around Brussels sprouts menu launches, while others are pairing up value with seasonality. Still, the question remains on how to balance seasonal flavor anticipation, while extending the holiday season without launching too early or too late, opening up conversations about hyper-seasonal fall/winter menus.

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# Report Content



## EXECUTIVE SUMMARY

- What you need to know
- Market predictions
- What consumers want & why

### Opportunities

- There's more to comfort than currently meets the menu
  - Graph 1: interest in fall/winter flavors in specific types of menu items, 2024
  - Graph 2: approach to fall/winter foodservice dining, 2024
- Seasonality must flex to fit different climate cravings
  - Graph 3: approach to fall/winter restaurant dining, by region, 2024
  - Graph 4: fall/winter dining attitudes and behaviors, by region, 2024
- Grow appreciation for fall/winter produce
  - Graph 5: experience with and interest in fall/winter seasonal produce, 2024
- Help explorative younger generations step into more seasonal flavors and ingredients
  - Graph 6: interest in trial of seasonal flavors and ingredients, by generation, 2024

## MARKET DYNAMICS

- Market context

### Market drivers

- Elevated dining costs demand creative value strategies
  - Graph 7: sales of food at home and away from home, 2010-24
- Flavor trial shifts to lower cost, more casual occasions
  - Graph 8: new flavor trial locations, 2023
- Gen Z drives the accelerating pace of trends and fast food flavor exploration
  - Graph 9: new flavor trial locations, by generation, 2023
- Fall spills into summer

## CONSUMER INSIGHTS

### Consumer fast facts

#### Approach to fall/winter foodservice dining

- Eating for the seasons is a year round affair

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- Eating for the seasons is a year-round affair
  - Graph 10: approach to fall/winter foodservice dining, 2024
- Expand seasonal enjoyment across generations with menu variety
  - Graph 11: approach to fall/winter foodservice dining, by generation, 2024
- Regional fall/winter dining behaviors and definitions of comfort differ
  - Graph 12: approach to fall/winter restaurant dining, by region, 2024

## Interest in fall/winter menu innovation

- Seasonal produce can bring many benefits to menus
  - Graph 13: interest in fall/winter menu innovation, 2024
- Grocery shopping responsibilities make women more seasonally attuned to ingredients
  - Graph 14: interest in fall/winter menu innovation, by gender, 2024
- Enjoyment at the core of Gen Z's flavor exploration
  - Graph 15: interest in fall/winter menu innovation, 2024

## Experience and interest: fall and winter seasonal produce ingredients

- Consumers are open to diversifying fall/winter produce-centered experiences
  - Graph 16: experience with and interest in fall/winter seasonal produce, 2024
- Plenty of room to grow generational experiences with staple seasonal produce
  - Graph 17: positive trial of select flavors/ingredients at a restaurant, by generation, 2024

## Experience and interest: fall and winter flavors/ingredients

- Seasonal spices and herbs can wear many hats
  - Graph 18: experience with and interest in fall/winter flavors and ingredients, 2024
- A season that lends well to seasoning and herb exploration
  - Graph 19: interest in trial of seasonal flavors and ingredients, by generation, 2024

## Interest in fall/winter flavors in specific menu items

- Seasonal eats for everyday options
  - Graph 20: interest in trial of fall/winter flavors and ingredients in specific menu items, 2024
- Women lead seasonal flavor interests across menu items
  - Graph 21: interest in trial of fall/winter flavors and ingredients in specific menu items, by gender, 2024
- Generations seek different sized seasonal experiences
  - Graph 22: interest in trial of fall/winter flavors and ingredients in specific menu items

## Fall/winter foodservice attitudes

- Hyper-seasonal menu launches can balance anticipation with extension of celebrations
  - Graph 23: fall/winter dining attitudes and behaviors, 2024
- Seasonal flavor anticipation driven by female diners
  - Graph 24: fall/winter dining attitudes and behaviors, by gender, 2024

- Comforting classics can meet creativity for generationally relevant cravings
  - Graph 25: fall/winter dining attitudes and behaviors, by generation, 2024
- Seasonal cravings are geographically dependent
  - Graph 26: fall/winter dining attitudes and behaviors, by region, 2024

## INNOVATION AND MARKETING STRATEGIES

### Menu innovation: what's now

- P is for more than just PSL's
- Apples bring versatility via beverages
- Flavor combinations add duality to seasonal taste experiences
- Pecans prove perfect for pairing

### Menu innovation: what's near

- Harvest bowls put the spotlight on savory seasonal produce and ingredients...
- ...paving the way for fresh fall/winter dishes
- Pears and pomegranates sweeten fall/winter seasonal fruit options
- Oktoberfest on the menu means more seasonal flavors and ingredients to celebrate

### Menu innovation: what's next

- Global flavors infuse heat into fall/winter
- Inclusive menus support more seasonal holidays
- Lean into soup season
- Up the umami

### Marketing and advertising

- Caribou Coffee highlights authenticity of ingredients used in fall flavors
- 'Tis the season to pair value with seasonal items

## APPENDIX

- Consumer research questions
- Consumer research methodology
- Generations
- Abbreviations and terms



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