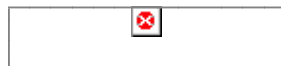




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Posted on: 05/09/2004

Full Flavor Forecast

By Marcia A. Wade, Technical Editor

In the exclusive 2004 Prepared Foods R&D Flavoring Trends Survey, respondents weigh in on which flavors, flavor systems and flavor technologies will spice up the industry.

May 2004 Issue--The 2004 Prepared Foods R&D Trends Survey on flavoring systems provides product development professionals insight into today's flavoring trends and tomorrow's logistical challenges. The flavoring trend in first place--chosen by 33% of respondents as something they would like to know more about--is the preferences of ethnic groups within North America. (See chart "Trends are the Task.")

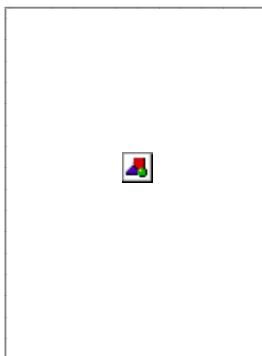
n Hispanic Flavors Hit the Market

David Dafoe, founder and technical director of Pro-Liquitech International (Louisville, Ky.) has been getting a lot of requests for Hispanic types of flavors such as horchata, a sweet, milky drink with spices like nutmeg and cinnamon that is popular in certain areas of the country. His company has helped customers in China, Brazil and South Africa create, improve and modify new beverages.

Walt Postelwait, industry director for the sweet and savory category at an international flavor supplier, says his company has multicultural exchange programs for its flavorists. But, he warns, "Ethnic trends do not always equate exactly to what the American market will want. Most ethnic profiles are typically Americanized in some form or fashion." They must be adapted to what customers are searching for in the American market.

Sixty-one percent of PF flavor survey respondents developing products for foodservice distribution and 59% working on new entrées say they will consider Mexican flavors for their present and future product development applications over the next three years. "We import some of our flavorists in from South America and send some of ours from North America down to South America to keep them up to speed on the most authentic regional flavor profiles," says Postelwait.

"Many of the juice flavors launched in the last 10 years, for example, the combination fruits (e.g., strawberry-banana or pineapple-mango), came from the U.S. Hispanic influence. That segment has motivated the beverage industry quite a bit regarding flavors," Dafoe informs.



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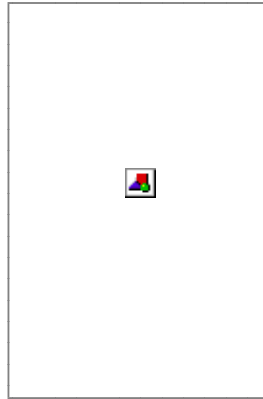
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Something About Berry

When asked what flavorings or flavoring systems respondents were likely to consider using in the projects they work on, those working in the baked goods, beverages, dairy products, nutritional products, meals/entrées and foodservice areas all ranked “traditional” flavors first. This includes lemon, fruit, lime, citrus and orange, which ranked well above less common flavorings such as cilantro or black tea. Cheese, vanilla and chocolate also placed high, most likely due to their success as masking agents in soy protein-based products, as well as their general popularity.



A unique write-in from two different respondents singled out pomegranate as a flavor the respondents' companies are considering, currently using, or believe will have a significant use in the next three years. Also, 6% selected soy masking flavors for the same question. “Pomegranate seems to be the hot flavor of the day,” reflects Dafoe. Palm Wonderful (San Joaquin Valley, Calif.) offers pomegranate-flavored beverages meshed with blueberry and cherry, among other flavors. As the “in” drink last year, it was showcased in Time magazine, Bon Appetit, Good Housekeeping and it made the ‘O’ list in Oprah’s magazine, ‘O.’ “We are hearing about pomegranate all over the place,” says Dafoe.

However, “It’s expensive to get consumers to try things that they are not familiar with.” Orange carrot juice debuted several years ago to rave reviews and then was cloned by several brands. Dafoe agrees that, “once you finally tasted it, it was really good and it was successful for three reasons. First, when people tried it, they liked it.” Also, it was perceived as healthy; and finally, it turned out to be a very strong ethnic product, and had been popular for quite some time in the Hispanic market. “They were on to something a little earlier than the rest of us.”

Dafoe perceives larger companies go with flavors that are tried and true, or traditional, while smaller companies, trying to break into the food and beverage industry, look for an edge and are innovative. “They’re trying to do something a little bit different. That’s where we find some of the more non-traditional flavors,” says Dafoe, who is working on berry, raspberry and strawberry colas.

But some large companies are taking note. On April 1, 2004, less than a year after Sprite (Coca Cola, Atlanta, Ga.) launched Tropical Sprite Remix, the company unveiled Sprite ReMix Berryclear. North American product beverage introductions (March 2003 to March 2004) based on the Global New Products Database (GNPD, Chicago) also confirm the launch of berry-flavored products (94) as a growing trend, surpassing even tropical flavors (62).

“Among lemon, grapefruit, berries, apples, pears and other fruit flavors, the berries generally cost more than all the others,” says Dafoe. “The raw materials and natural flavor chemicals are simply more expensive.”

Dafoe explains that there are a couple of other challenges with berry-flavored beverages. “The shelflife on some of the natural berry flavors is a little shorter than what beverage companies would like to see. They are a bit more delicate than citrus flavors or colas.”

“A problem with fruit flavor is that through the various processing [steps], especially in spray drying, you may lose some of the flavor components,” says Irwin Jacobs, director of chemical technology for Particle and Coating Technologies Inc. (St. Louis, Mo.).



Flavor Saviors

For over 25 years, the natural snacks pioneer Kettle Foods (Salem, Ore.) has been successful in offering exactly what its customers want. “We try to listen carefully and deliver on flavors people expect but then go beyond that and exceed those expectations,” says Michelle Peterman, vice president of marketing.

Peterman agrees there are different snacking communities of consumers who want very simple flavors. The number one product for nearly every brand will be the regular, lightly salted potato chip. “We call those types of consumers the ‘purist’ consumers.” On the opposite spectrum are consumers that will buy a different product every week. “They love to rotate with flavors. You have to stay ahead of them and exceed their expectations,” says Peterman. “You need to understand both groups and respond to them in kind.”

Many chip manufacturers now are climbing to meet the ‘no trans-fat’ standard that was the foundation of Kettle Foods. Peterman maintains the oils used, safflower and sunflower, not only are polyunsaturated (a customer concern), but also deliver a cleaner taste because they do not overpower either the potato or spices used to flavor the chips.

Natural products often are driven by positioning of the end product relative to labeling. Concern with flavor provenance was an issue for 45% of the respondents, while 33% claim their concern is dependent upon the originating country, and 15% had no concern.

More than five survey respondents added “organic” as an emerging flavor technology they would like to learn more about. “Organic and natural foods promise better taste [than they used to]. It is not so special and niche anymore and is becoming more mainstream,” writes one respondent. However, “There is an inherent additional cost to make something out of a natural ingredient that has to be grown, as opposed to chemically derived,” says Postelwait.

When listing the three leading ways in which natural flavors on the market “fall short,” 53%, 45% and 31% of respondents (respectively) chose “a good value for the money,” “stable over finished product’s shelflife,” and “stable to processes.” In other words, natural flavors manufacturers need to work on making their products more cost effective and stable. (See chart “Greater Expectations?”)

Another challenge that comes with flavoring organic products is the availability of natural raw materials. “It’s a smaller universe and a smaller piece of supply to work with. It forces us to be really creative because you have to jump through a few more hoops. It’s harder to find things like organic lime,” explains Peterman.

Seeking Trends

By staying ahead of trends, Kettle Foods has found success in the obvious and unordinary, with products like Salt and Fresh Ground Pepper Krinkle Cut or Roasted Red Pepper and Goat Cheese varieties of Kettle[tm] brand potato chips. “The actual flavors aren’t overly wild and crazy, but they are new [to the chip category] and no one has really done it before us,” says Peterman. “In that case, it’s a real success story.”

Although Kettle Foods makes it look easy, Peterman explains that it is not. The company pulls its flavor prospects from a number of different sources. “We watch what is happening in the natural food industry and what other brands are doing,” she says. “We



are inspired by restaurant trends and tastes we love. We look at microbrewers and beer and wine trends because a lot of people love potato chips with beer.” Recently, the company has eyed artisan cheeses, which are drawing much attention on the West Coast.

In some cases, if there is no other company developing certain flavors, there will not be any market data to direct inspiration. “We will always be independent and look beyond the obvious and not just react to what the data tells us. That just means taking risks. Reading data and market trends is just one part of the equation,” suggests Peterman. “In a way, it takes culinary and taste vision to see beyond data.”

Another trend, functional foods, also presents a challenge. Flavoring such products is a vision that 15% of those in the dairy industry and 9% in baked goods thought worth mentioning.

For example, the FDA is allowing for labeling claims based upon evidence that phytosterols and stanol esters assist in lowering blood cholesterol. The company at which Postelwait works has developed a patent for a flavor that includes phytosterols and stanols in many different flavors for a wide variety of food products. Manufacturers now have “one finished formula to put into their food item that will add functionality and an FDA-approved health claim,” says Postelwait.

The amount of phytosterol that ends up in a large production batch of bakery mix is relatively small. It is difficult for most manufacturers to weigh minute quantities properly. Flavoring companies, on the other hand, regularly handle minuscule amounts of aroma chemicals and are able to add phytosterols into the flavors at a more regulated dosage.

Of those surveyed who work with nutritional products, 50% want to know more about trends in beverage flavors and 21% want to know about flavor preferences of adults aged 36-60.

Figuring Your Flavor Factor

Price was ranked first by 75% of respondents, when asked what factors would determine/qualify a company from which they would purchase flavorings. Technical support followed, with a 68% response.

“Most food and beverage suppliers lean on the flavor companies for a long laundry list of services, especially technical and application services,” says Postelwait.

Sixty-six percent of respondents work in R&D. “Application, R&D and marketing services were historically almost 100% done by the food manufacturers but, over the last 20 years, that has really shifted, and now a lot of that work is being done by the flavor companies,” remarks Postelwait.

When enlisting development work from a flavor company, many national and multinational companies typically will insist that flavor companies come in and give a product demonstration, supported with marketing data, on what they think is the next “hot thing.”

“They are relying on the flavor companies to help give them ideas and direction. Not only do they want you to show them your flavors, but they want you to show them in a truly new and innovative application,” states Postelwait. “That’s why, to be considered a top flavor company, you have to be as good as—or sometimes better—than your customers at their own finished application formulation. The only way you can create just the right

flavor is to understand the complete interaction of all the ingredients in an application.”

The Flavoring System

Normally, there are five components that can be incorporated into flavor systems: (1) flavor chemicals, (2) colors, (3) masking agents, (4) vitamins and minerals or (5) juices. A flavoring system can be any kind of flavor, or it can be flavor ingredients with flavor chemicals like ethyl acetate, ethyl butyrate or dimethyl sulfide.

Stability over a finished product's shelflife seems to be a concern of many who use flavorings. “Product development becomes a balancing act between the total cost of the product, the shelflife and consumer preference. Some manufacturers may only use natural flavors, while there are manufacturers that would rather have a much better tasting product that will last longer, and sacrifice the natural claim,” observes Dafoe.

Flavor challenges in baking or savory snacks include oxidation, interaction with different minerals and water migration. Flavors tend to migrate with water, so the water stability of the finished product is significant.

According to the survey, manufacturers positioned conventional oven heating, microwaving and frozen processing as types of products under development that are in need of flavoring. Write-ins for the same question posited that flavoring platforms should be developed for aseptic/UHT, ready-to-eat meals, retort pouches and shelf-stable products.

“Developing dairy products is very difficult because processing is rigorous. UHT will sometimes destroy your flavor system and it usually takes multiple trials to get it right,” says Dafoe. With dairy foods, a flavor company has to have the same (or similar) pilot equipment as the manufacturer, such as the UHT equipment and, often times, small batches of 100 gallons is the least amount that can be tested.

An open-ended question asking what emerging flavor technologies manufacturers would like to know more about drew over 14 responses about encapsulation. Shelf stability, organic and natural flavors elicited significant inquiries. Another technology that drew curiosity was slow delivery and timed flavor release. Respondents working with dairy (65%) and nutritional products (62%) said they wanted to learn more about flavors that modify taste perception.

“Third party companies are teaming up with flavor houses to attack the flavor masking issue and bitterness,” says Postelwait. Research boils down to one thing: working with an ingredient to alter its perceived flavor impression, he says. One example is the use of vanilla with soy proteins. Several product developers say they have yet to find the elusive silver bullet, a masking agent that will kill the bitter soy taste once and for all.

Soy masking was a popular write-in, and respondents emphasized that masking agents and soy products go hand in hand. “Some of the answers lie in the beverage base. If the manufacturer is trying to get a claim by really packing the grams of protein into a soy beverage, it becomes impossible to mask all of that,” says Dafoe. But, he says, some manufacturers are using a juice component with soy so the grams of protein from the soy are a little bit lower. Additionally, the beverage benefits by having the extra flavor introduced by the juice. “If you work hard on the base, you really don't need those types of masking agents,” he says.

In the end, the sky's the limit as to which flavors will succeed. Many agree that marketing muscle has more to do with what flavors are launched than any other circumstance. It takes a significant amount of resources to get a product to market. Once there, a great flavor is needed to keep it there.

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- Kettle Foods : www.kettlefoods.com
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