

# Pumpkin Spice: America's Top Trending Flavor

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Thought Leadership Newsletter

P9 2023



# America Falls In Love With Pumpkin Spice

We've run the numbers, and the data says that there is nothing quite like Pumpkin Spice. This warming blend of cinnamon, nutmeg, ginger, cloves (and sometimes allspice) can be found in an increasingly bigger number of products which seemingly come out earlier every year. In terms of “bounce” – going from low sales to high sales – no other flavor takes America by storm like Pumpkin Spice does.

**Read on to learn more about this flavor phenomenon.**

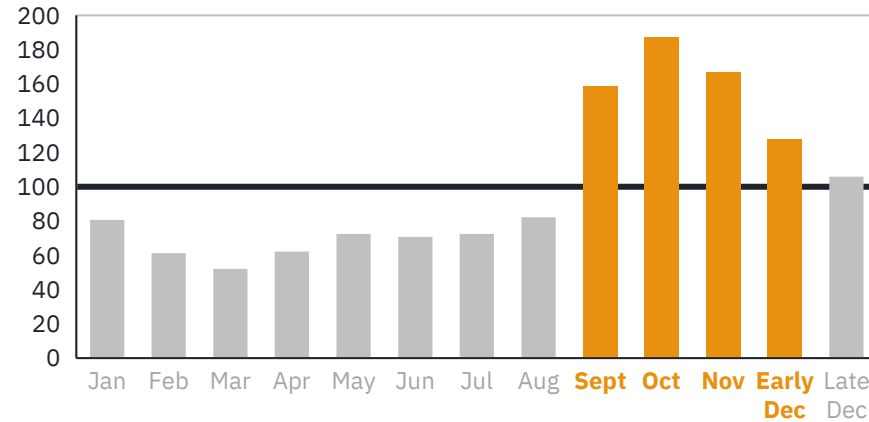


# Spicy Seasonality

Looking at flavor trends by season, the start of the year is calm. Sales spikes of **Spring** and **Summer** flavors are muted compared to the latter half of the year. **Winter** favorites like **Egg Nog** and **Peppermint** spike high, but their sales impact is shorter. **Fall's** hallmark flavor – **Pumpkin Spice** – spikes just as high and twice as long as any other flavor we track.

Seasonality Index = Quad \$ Sales / Avg of all 13 Quad \$ Sales \* 100

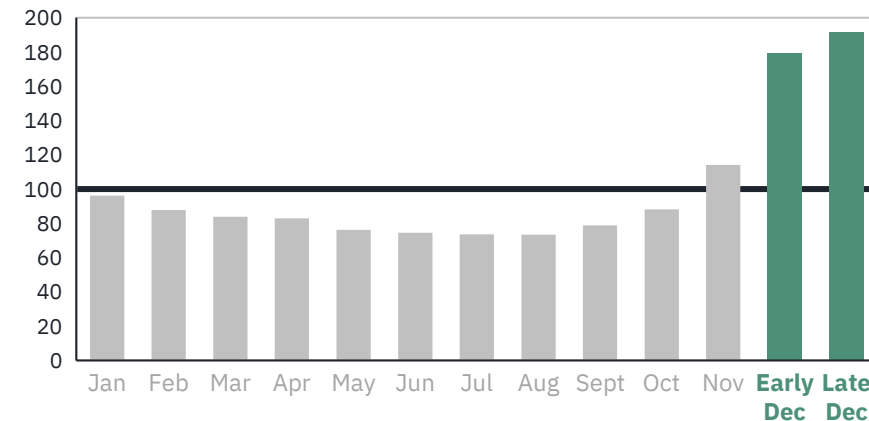
## Seasonality Index



## Fall: Flavor Prime Time

**3** flavors over-index in Sept to Dec

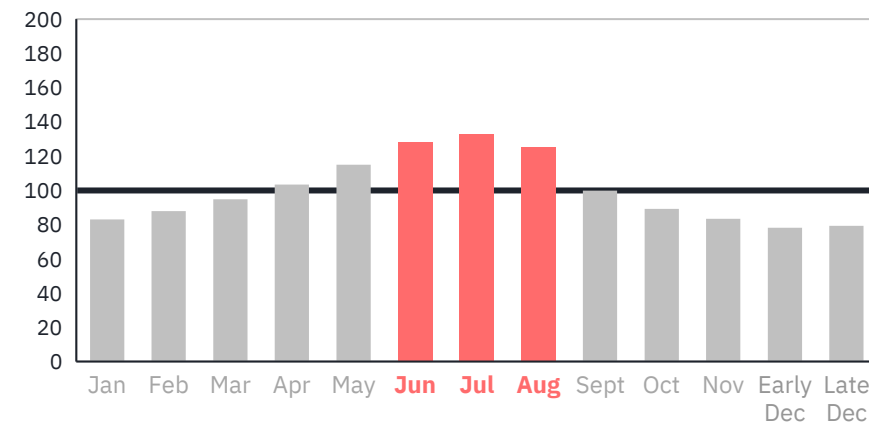
Top flavors: **Pumpkin Spice**  
**Spinach Artichoke**  
**Spice (e.g. Spice Cake)**



## Winter: Festive Follow-Up

**34** flavors over-index in December

Top flavors: **Egg Nog**  
**Fruitcake**  
**Gingerbread**  
**Anise**  
**Peppermint**



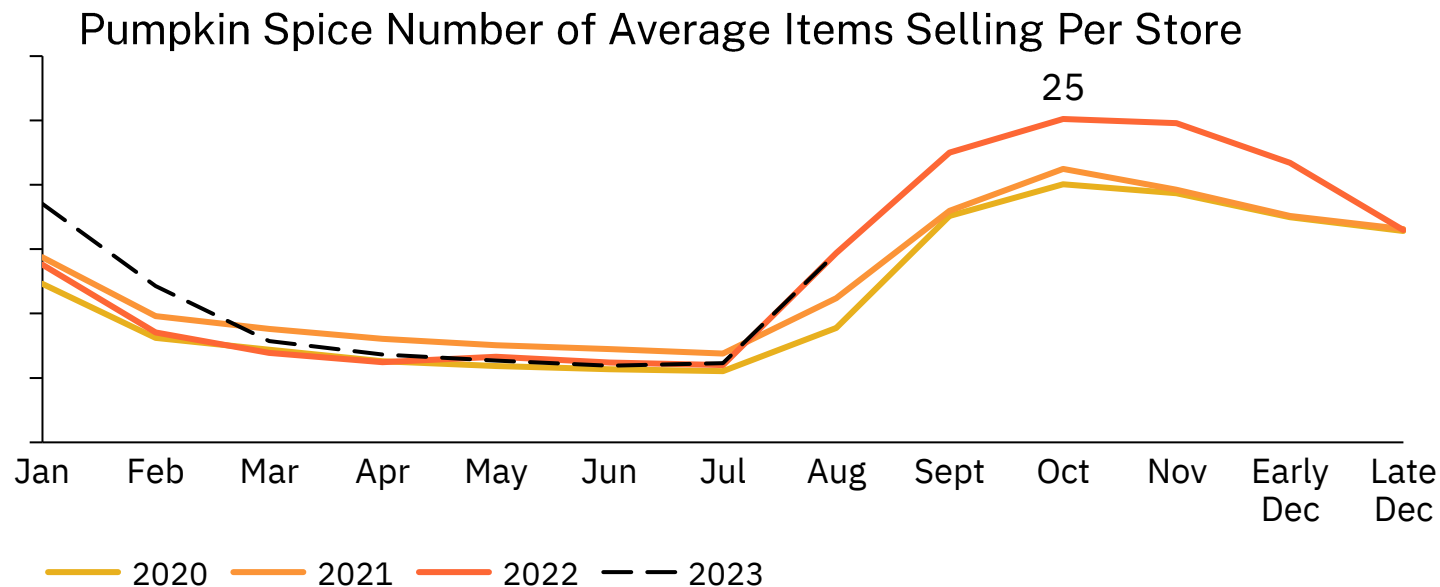
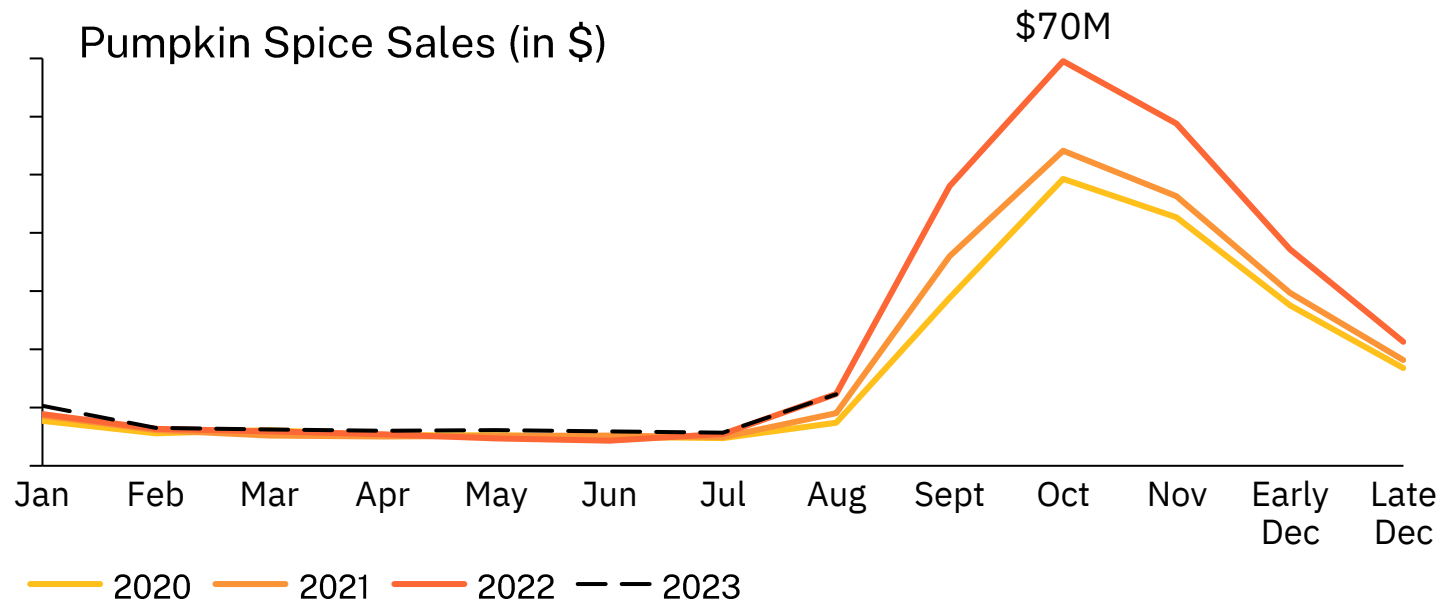
## Summer: A Hint of Fruit

**29** flavors over-index in Jun-Aug

Top flavors: **Limeade**  
**Bratwurst**  
**Kiwi**  
**Agave**  
**Watermelon**

## Spring: An Anomaly

No flavors over-index in Mar-May



Source: SPINSScan TOTAL MULO, TPL Universe, Trended L13 Quads ending 08/13/2023

## 2023 Sales Are On Track To Meet or Surpass 2022

Pumpkin flavors are highly seasonal with sales beginning to **pick up in August and peaking in early October**. The sales trend has remained consistent over the past three years with sales growing year-over-year.

Pumpkin spice flavored products have experienced consistent growth due to the **continued introduction of additional items and the expansion of its presence** into various categories. The diversity of pumpkin offerings and innovation is appealing to new consumers and driving incremental sales.

# The Expansion of Pumpkin Spice Through Time

Starbucks' Pumpkin Spice Latte kickstarted the trend, but Pumpkin Spice has shown enduring appeal & relevance across numerous other products and brands



**1930's:** Spice manufacturers introduce **Pumpkin Pie Spice**, simplifying baking with pre-blended mixes—Thompson & Taylor's 1933 version has 9 spices, & McCormick's 1934 blend features 4 spices.



*70 years later...*



**2003:** Starbucks introduces the renowned **Pumpkin Spice Latte (PSL)** as a limited-time fall beverage, sparking a seasonal craze.



**Mid-2000's:** Pumpkin spice trend **gains momentum in coffees & creamers**. In 2007, Dunkin' unveils Pumpkin Flavor Swirl for both hot and cold coffee. This triggered a wave of competitors diving into the trend.



**2010's:** Pumpkin spice **extends its reach beyond coffee & creamers on retail shelves**. In 2010, Samuel Adams introduces pumpkin beer, while in 2014, Chobani unveils Pumpkin Spice yogurt. As the pumpkin spice trend continues to grow on retail shelves, Starbucks releases a retail version of their iced PSL in 2017.



**2019:** Starbucks adds the **Pumpkin Cream Cold Brew** to its seasonal fall line-up.



**2020:** Starbucks' Pumpkin Cold Brew outpaces PSL sales in-store, signifying a **new generation, stand-out pumpkin spice drink**. Brands are quick to introduce competing retail products in retail, like SToK Pumpkin Creamed Cold Brew.



**2021:** Starbucks' **Pumpkin Spice Cold Brew** makes its debut in grocery stores, catering to at-home coffee enthusiasts. Other at-home & food service brands continue releasing competitive products.



**2023:** Seasonal innovation continues to thrive in the retail sector, with **51 new Pumpkin Spice products (not including Private Label)** debuting in the MULO Channel across food & beverage, underscoring the enduring popularity of this seasonal sensation.



## What's the Cost of Convenience?

Starbucks' Store Price vs RTD Refrigerated Coffees



**\$0.33/oz**

**Starbucks Pumpkin Cream Cold Brew**

\$5.25 Base ARP, 16 Oz



**\$0.28/oz**

**Starbucks Pumpkin Spice Cold Brew**

\$9.04 Base ARP, 32 Oz



**\$0.12/oz**

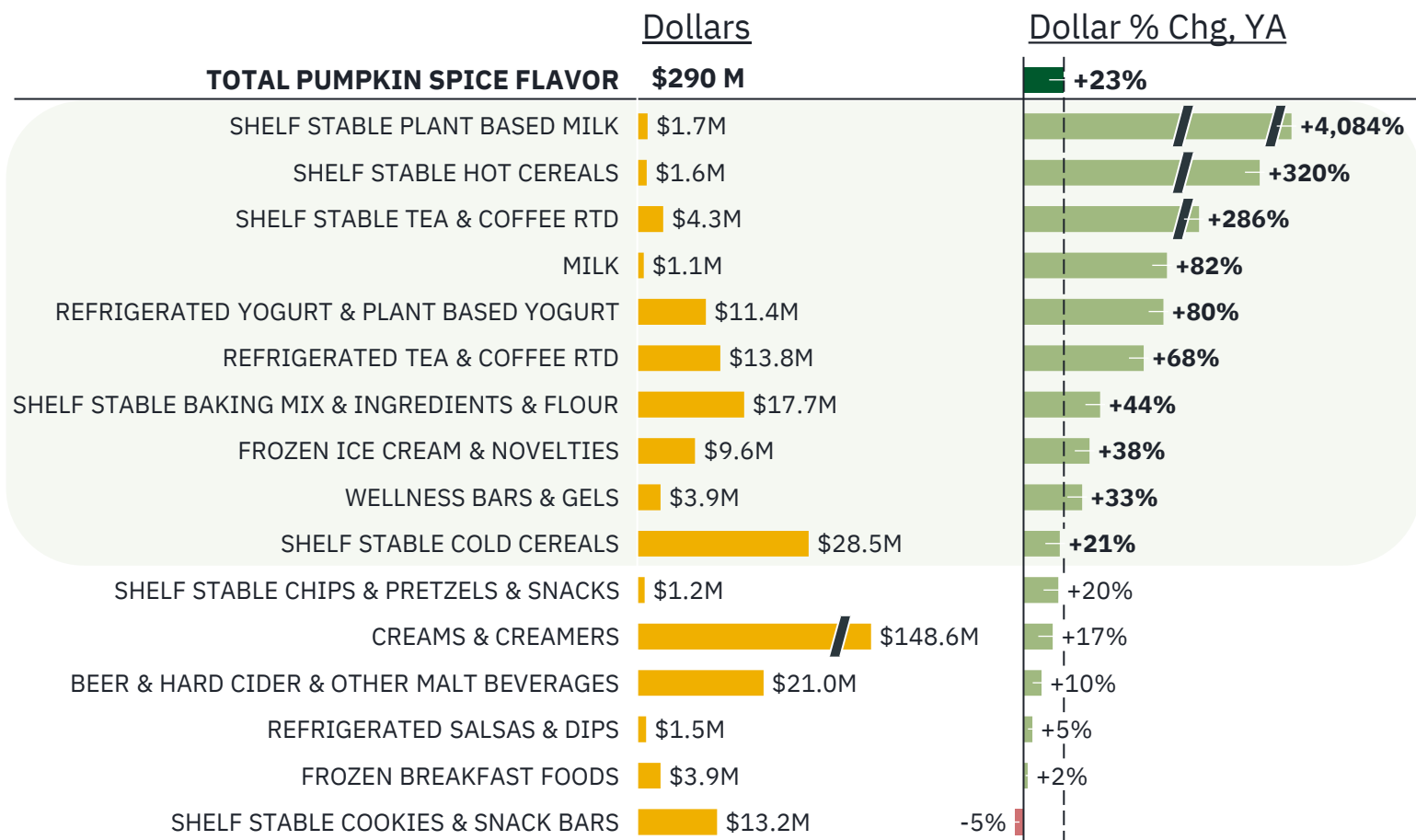
**SToK Pumpkin Creamed Cold Brew**

\$5.56 Base ARP, 48 Oz



# Pumpkin Spice Is Proliferating

Pumpkin spice's appeal spans various categories but sees the most significant % growth in coffees & creamers, breakfast & snacks, & dessert categories



## Items Driving Growth

### Coffees & Creamers



### Breakfast & Snacks



### Desserts

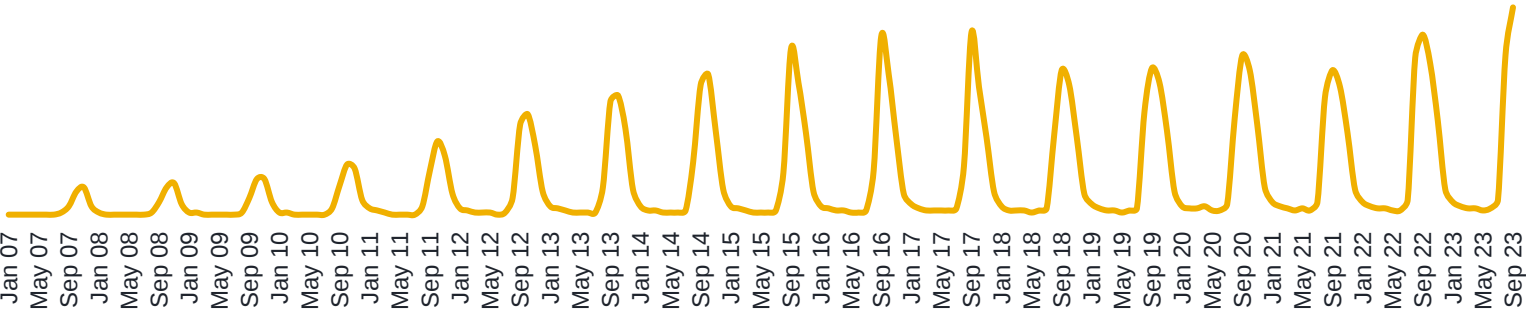


# #PumpkinSpice On Social Media

Google trends for #PumpkinSpice peak during the fall season with interest hitting a peak in September 2017. A slight lull followed from 2018 to 2021 but rebounded last fall. A third of the viewers on TikTok are younger, with only 12% of viewers being 35 or older. Viral videos recommend at-home pumpkin spice recipes and offer Starbucks menu hacks.

## Google Trends

Search Trends Peak In September Every Year



#pumpkinspice

2.5B views

97M+

#PumpkinSpice  
Views L 7 Days  
All Regions



myhealthydish



gabby.jaye



quickballs



snackolator

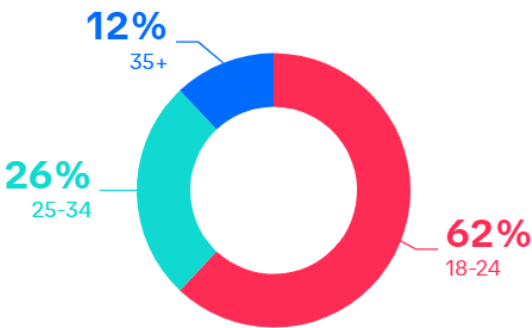


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## TikTok Viewers



### Top regions

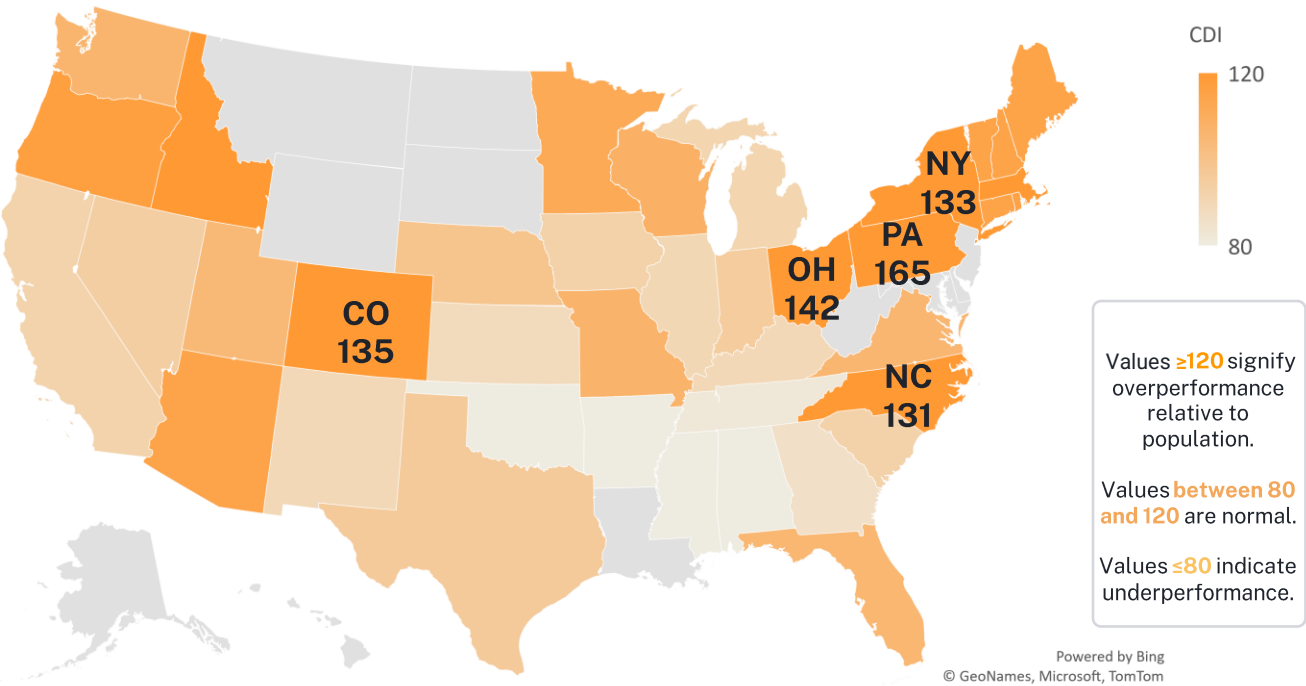
|   |                      |     |
|---|----------------------|-----|
| 1 | United States        | 584 |
| 2 | Canada               | 529 |
| 3 | Hungary              | 225 |
| 4 | Mexico               | 175 |
| 5 | United Arab Emirates | 157 |

# Cleveland, Ohio Is The Top Market For Pumpkin Spice

The data suggests a correlation between over-purchasing of Pumpkin Spice products relative to the population and cities in northern areas with typically cooler weather in Fall

## MULO Channel Regions + CDI Values

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 Circana.



### Category Development Index (CDI)

A CDI relates the percent of a category or subcategory's sales in a region to the percent of the US population in the same market. The CDI is calculated by dividing a region's dollars per household by the total dollars per household. Values over 120 indicate overperformance relative to population.



## Top Cities Over-purchasing

| City                    | CDI | Avg Fall Temp (°F) |
|-------------------------|-----|--------------------|
| CLEVELAND, OH           | 205 | 50                 |
| PITTSBURGH, PA          | 181 | 50                 |
| HARRISBURG/SCRANTON, PA | 171 | 50                 |
| BUFFALO/ROCHESTER, NY   | 163 | 47                 |
| SYRACUSE, NY            | 154 | 46                 |



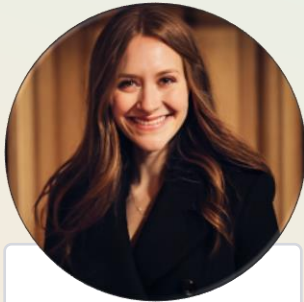
## Bottom Cities Under-purchasing

| City                       | CDI | Avg Fall Temp (°F) |
|----------------------------|-----|--------------------|
| BIRMINGHAM/MONTGOMERY, AL  | 62  | 60                 |
| LITTLE ROCK, AR            | 58  | 59                 |
| MEMPHIS, TN                | 47  | 59                 |
| NEW ORLEANS, LA/MOBILE, AL | 47  | 69                 |
| MISSISSIPPI                | 28  | 62                 |

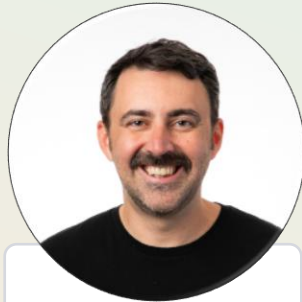
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