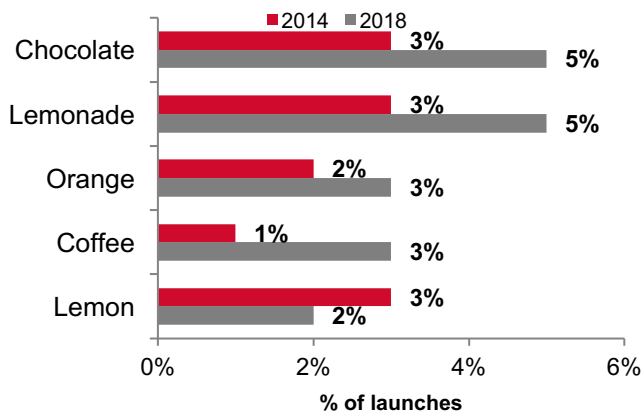


This section of the monthly update focuses on a specific food/drink category, aiming to provide you with an understanding of what's trending across new product introductions. This month's focus is: **Beverage Concentrates**

Innovation heats up in coffee-flavored beverage concentrates & mixes

North America: beverage concentrates & mixes NPD by top 5 flavours, 2014 vs 2018



Recent launch activity shows a number of brands are expanding their offerings in coffee-flavoured concentrates and mixes in North America.

The lucrative segment is seeing a raft of interesting format developments influenced by wider coffee shop trends.

According to NPD activity in North America, coffee is one of the top five flavor profiles in the category

Cold-brew coffee stands out as a new format

Cold-brew coffee continues to be popular in coffee shops and the concept is increasingly filtering through into the retail channel. Interest in cold-brew formats derives from its distinct flavor, less acidity and smoother mouthfeel and is mostly popular among Millennials. For example, 51% of US Millennials drink cold-brew formats of ready-to-drink or instant coffee at home or on-the-go. The beverage concentrate & mixes category is also seeing a rise in cold-brew coffee formats aimed at younger consumers.



*Simple Truth Organic Cold Brew Coffee Concentrate contains no preservatives and is free from GMO ingredients (US).*



*Trader Joe's Coconut Cold Brew Coffee Concentrate is said to be bold and smooth. According to the manufacturer, it is truly cold brew as it has never been heated (US).*



*Grady's Cold Brew Bean Bags are naturally sweetened with chicory and retail in a newly designed 2-oz single use pack (US).*

For more information, please contact  
Tree Top at 509-698-1435



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### Starbucks unveils at-home cold-brew pitcher packs

Starbucks Cold Brew Coffee Nariño 70 Ground Coffee Pitcher Pack is designed to make cold-brew coffee an easy process at-home. Consumers just need to add the pitcher packs to water to slow-steep in the refrigerator for 24 hours.



The product is positioned as "a simple method that brews with time instead of heat by simply adding cold water for a cold, super smooth coffee".

Starbucks Nariño 70, which is a custom coffee combining 70% Colombia Nariño and 30% African medium roast coffee beans, is ideal for the 11% of US coffee drinkers who would be interested in roasts specially made for making cold-brew coffee at home.

### Coffee cubes – an interesting take on preparing a convenient coffee smoothie



- > Comprises frozen fruit cubes with coffee, milk and dates
- > Made with coffee beans harvested, roasted and brewed at the peak of ripeness for maximum flavour
- > All natural, sweetened with dates
- > Convenient and easy to prepare by adding yogurt, kefir, milk or coconut water
- > Retail in 300g pack containing four servings.

Inbalance Coffee, Milk & Date Smoothie Cubes (Canada)

### Coffee enhancers bring convenience to the table

Consumers' growing desire for convenient products has led to a rise in liquid coffee enhancers. Signature Select's Sugar Free Caramel Coffee Enhancer is described as a low calorie enhancer that is naturally flavored and recommends one squeeze per 8-fl oz serving. The product retails in a a 1.62-fl oz bottle containing 24 servings.



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**Coffee-based cocktail mixers could extend consumption occasion of concentrates**

Newer formats of coffee-flavoured concentrates, eg cocktail mixers, could extend the consumption occasion for concentrates by making them suitable for nighttime consumption.

For example, Williams-Sonoma's Irish Coffee Toddy Cozy Cocktail Mixer is made with coffee and brown sugar and is a handcrafted classic that can be mixed with whiskey, bourbon or rum and topped with a luxurious layer of fresh cream.



**North American brands take inspiration from on-trade premises by bringing the cocktail experience into the home**

Raising consumers' quality perceptions of beverage concentrates is key to encouraging higher consumption levels. In order to achieve this, some brands have looked to bring on-trade experiences at-home.

Modern Gourmet Food's Mojito and Hard Lemonade Mason Jar Dispensers launched in the US are a prime example. They retail in a 2.25-qt pack, which includes a 1 gallon dispenser with mojito mix or hard lemonade and only require the addition of rum or vodka.



*Modern Gourmet Foods Hard Lemonade Mason Jar Dispenser just requires the addition of vodka and retails in a 2.25-qt. pack which includes a 1 gallon dispenser and hard lemonade mix, and is enough to make 18 hard lemonades.*



*Lt. Blender's Piña Colada in a Bag All Natural Piña Colada is said to be "the easiest way to make fresh, delicious cocktails at-home. No blender, no long shopping list, no PhD in mixology required".*

*The all-natural cocktail mixes are made by adding the appropriate spirit, replacing the cap, shaking and freezing to be enjoyed.*

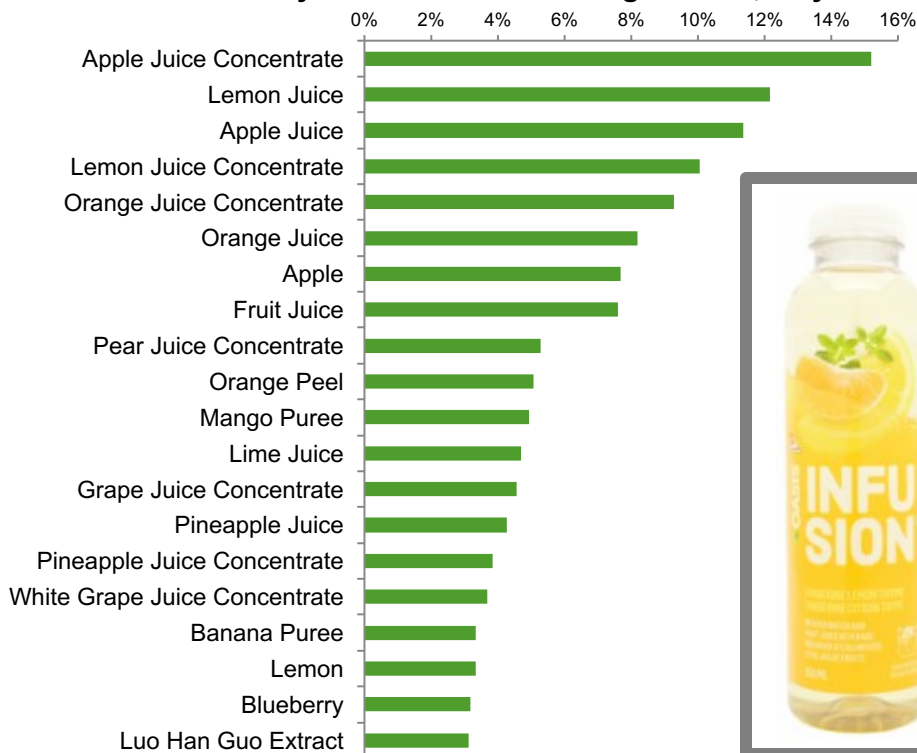
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This section of the monthly update keeps you informed on what's happening in fruit, focusing on popular and growing fruit ingredients being seen among drink products launched in North America.

### Most Active & Top Growing Fruit Ingredients

% of North America drink products with fruit listed as an ingredient, by 20 most active fruit ingredients, July 2017-June 2018



**Lassonde Oasis Infusion Tangerine, Lemon and Thyme Infused Water & Fruit Juice Beverage** is a pasteurised cold-infused product that retails in a 355ml recyclable pack.

Ingredients on pack: *infusion (water, orange peel, lemon peel, rosehips, tangerine, lemon verbena, thyme leaves), fruit juice concentrates (concentrated apple juice, concentrated lemon juice), natural flavour*

% of North America drink products with fruit listed as an ingredient, by 10 top growing fruit ingredients, July 2016-June 2018

Emerging Fruit Ingredients	% change:	
	Jun 2016 - May 2017	Jun 2017 - May 2018
Acerola Puree	669%	0.6%
Acai	252%	0.7%
Acerola Extract	230%	0.4%
Goji Berry	186%	0.6%
Date	186%	0.6%
Blackcurrant Juice Concentrate	175%	0.5%
Orange	159%	1.6%
Luo Han Guo Extract	105%	2.3%
Pineapple	103%	2.0%
Raisins	98%	0.5%

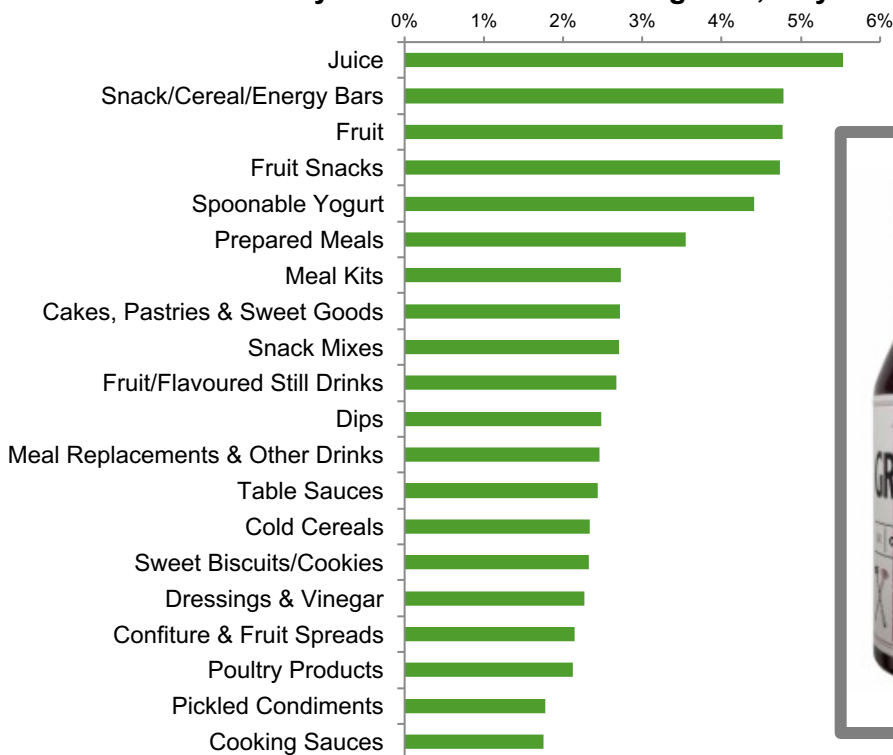
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This section of the monthly update keeps you informed on what's happening in fruit, focusing on popular and growing fruit ingredients being seen among food/drink products launched in North America.

### Most Active & Top Growing Categories with Fruit Ingredients

% of North America food & drink products with fruit listed as an ingredient, by 20 most active sub-categories, July 2017-June 2018




**Lidl Grenadine Cocktail Mix** is said to be made using quality selected ingredients. The product retails in a 12.7-fl. oz. pack bearing the Facebook, Twitter and Instagram logos.

Ingredients on pack: *sugar, water, pomegranate juice concentrate, citric acid, purple carrot extract (color), natural flavors, potassium sorbate, sodium benzoate (preservative)*

% of North America food & drink products with fruit listed as an ingredient, by 10 top growing sub-categories, July 2016-June 2018

Emerging Sub-categories with Fruit Ingredients	% change:		Total Sample
	Jun 2016 - May 2017	Jun 2017 - May 2018	
Flavored Milk	323%	0.1%	
Baby Cereals	281%	0.2%	
Butter	217%	0.0%	
Fortified & Other Wines	217%	0.0%	
Beverage Mixes	191%	0.2%	
Baby Fruit Products, Desserts & Yogurts	166%	1.0%	
Instant Noodles	147%	0.1%	
Rice	138%	0.1%	
Other Sauces & Seasonings	133%	0.3%	
Medicated Confectionery	133%	0.1%	

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