

A high-quality photograph of matcha green tea preparation. In the foreground, a rustic ceramic bowl is filled with a vibrant green, frothy matcha drink. To the right, a dark, shallow dish holds a pile of bright green matcha powder. A traditional bamboo whisk (chasen) with a light-colored wooden handle lies diagonally across the upper portion of the image. The entire scene is set against a background of a green bamboo mat with a distinct diagonal ribbed pattern. A semi-transparent blue rectangular box with a thin yellow border is positioned in the center, containing the report's title and introductory text.

MATCHA GREEN TEA

2020 • FLAVOR INSIGHT REPORT

Matcha is finely ground powder of specially grown and processed green tea leaves. The traditional Japanese tea ceremony centers on the preparation, serving, and drinking of matcha as hot tea and embodies a meditative spiritual style. In modern times, matcha also has come to be used to flavor and dye foods such as mochi and soba noodles. Since 2014, matcha green tea flavored new products are growing globally with 148% growth. Asia Pacific is the key region for growth with 77% of all new products, but with its healthy halo, it's no surprise that North America is showing 86% growth in the past year. Let's take a closer look at the various forms of matcha on the menu, in social media, and in new products.

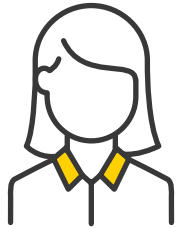
MATCHA GREEN TEA

Social Listening Summary

We conducted a social listening analysis on matcha green tea covering the previous six months. An overview is provided below.



Mentions per Hour



83%
Female

Key Consumer Voice

Keywords: latte, powder, ice cream, face mask



KEY CONSUMER INTERESTS

- 1) 80% Food & Drink
- 2) 64% Desserts & Baking
- 3) 22% Cooking

TOP POSTS

Instagram: Recipe for Fluffy Matcha Green Tea Cupcakes from @tastemadeuk.

Instagram: Recipe for Coconut Matcha Overnight Oats from @matchaeologist.

Source: Infegy



50

MATCHA RECIPES
ON FOOD.COM



On Food.com, 50 recipes appear when you search for matcha. Recipes include smoothies, lattes, shortbread cookies, Japanese style cheesecake, tea cakes, scones, donuts, ice cream and the most interesting is for matcha eggs.

The Benefits of Matcha—that will make you want to drink it every day.

In the April 2019 issue of Women's Health magazine, they discuss how matcha has become a popular beverage and it has maintained its "cult" status. It explains how matcha is a member of the green tea family and since the tea leaves are ground into a powder, you are getting a higher concentration of nutrients that just steeping the leaves whole.



MATCHA GREEN TEA

ON THE MENU: Q3 2018-Q3 2019

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232

MATCHA MENTIONS
ON THE MENU

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Fine Dining is the top restaurant segment, with desserts, beverage and entrées the top three menu sections with the most matcha-flavored items. Desserts account for 58% of all matcha-flavored menu items.



MENU MENTIONS:

- **Green Tea Wasabi Cupcake** features a Matcha Green Tea cupcake baked with wasabi and topped with green tea and wasabi vegan buttercream at Yummy Cupcakes in Encinitas, CA
- **Matcha Tiramisu** features a Matcha Green Tea sponge cake with mascarpone cream, hint of red bean paste, chestnuts, matcha powder at Sakagura in New York, NY
- **Matcha Horchata** features oat milk, cinnamon, matcha green tea and vanilla at True Food Kitchen in Phoenix, AZ



“Matcha is the star of green tea growth. Green tea now accounts for 15% of U.S. consumption. Global Industry Analysts (GIS) predicts the green tea market will grow \$8.1 billion globally by 2025.” -World Tea News



MATCHA GREEN TEA

Global New Product Introductions: 2014-2019

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2,252

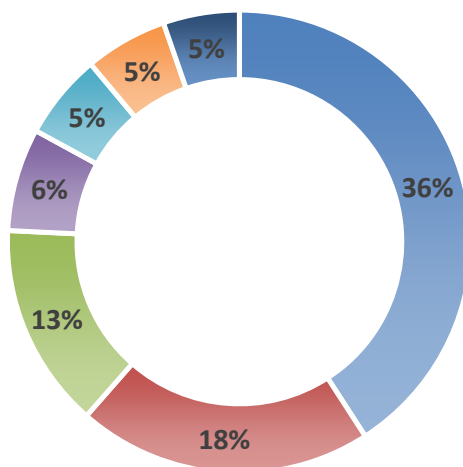
MATCHA FLAVORED
NEW PRODUCT
INTRODUCTIONS

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GLOBAL FAST FACTS:

- **ASIA PACIFIC** is the top global region for matcha new product introductions with 77% of all new products.
- **CAKE, PASTRY AND SWEET GOODS** is the top product sub-category globally for matcha flavored new products.
- **AZUKI RED BEAN** is the top flavor paired with matcha.

TOP MATCHA PRODUCT CATEGORIES



- Bakery
- Desserts & Ice Cream
- Chocolate Confectionery
- Other Beverages
- Sugar & Gum Confectionery
- Dairy
- Snacks



CLIPPER GINGER GREEN TEA WITH A TWIST OF MATCHA & TURMERIC:

A natural, fair and delicious tea grown in a way that preserves the natural balance of the environment. | Netherlands



QUAKER JAPANESE MATCHA FLAVORED OAT CEREAL:

This oatmeal contains 100% Australian oats, selected Japanese matcha powder and imported milk source from New Zealand. | China



LODY SYRENKA MATCHA CASHEW ICE CREAM:

The ingredients are described as simple and from nature. Instead of milk, our ice cream gets its creaminess from cashew nuts and coconuts. | Poland

MATCHA GREEN TEA

North America New Product Introductions: 2014-2019

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120

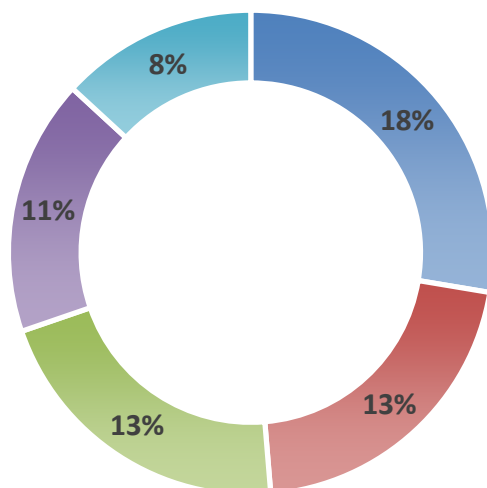
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NORTH AMERICA FAST FACTS:

- **NORTH AMERICA** accounts for 5% of all matcha flavored new product introductions.
- **CHOCOLATE TABLETS & SWEET BISCUITS/COOKIES** are the top product sub-category for matcha flavored new products.
- **CHOCOLATE** is the top flavor paired with matcha.

TOP MATCHA PRODUCT CATEGORIES



- Chocolate Confectionery
- Other Beverages
- Bakery
- Desserts & Ice Cream
- Juice Drinks



TRADER JOE'S MATCHA ALMOND BEVERAGE: Described as a smooth and creamy non-dairy beverage made with real almonds and matcha green tea 36% of consumers responded that they likely or definitely would purchase this product, significantly outperforming its subcategory. | USA



LIVBAR LEMONGRASS CHERRY MATCHA ORGANIC SUPERFOOD BAR: This Organic certified and handmade, vegan superfood bar is free from gluten, soy, dairy, corn and GMOs. Only 30% of consumers responded that they likely or definitely would purchase this product, significantly underperforming its subcategory. | USA



LOACKER QUADRATINI MATCHA GREEN TEA BITE SIZE WAFER COOKIES: Described as irresistible bite-sized goodness, and comprise light and crispy five wafers with four layers of delicious cream. Only 35% of consumers responded that they likely or definitely would purchase this product, significantly underperforming its subcategory. | USA

THE TAKEAWAYS

The interest in matcha green tea is making its way to North America primarily through chocolate confectionary. For those posting about matcha on social media: key interests are food & drink, desserts & baking and cooking. This distinct flavor profile and healthy halo associated with matcha adds a nuance beyond traditional tea beverages and moving into non-dairy milks, bakery, desserts and ice cream and even juice drinks. The question is: is matcha on your Flavor Radar?

SOURCES:

Mintel GNPD
Mintel Menu Insights
Mintel Purchase Intelligence
Food.com
Food Lover's Companion
Infegy
Women's Health Magazine



YOU DESERVE MORE. LET'S GET STARTED.

What does true partnership look like? You deserve a flavor partner ready to turn these trends into the tangible.

Let FONA's market insight and research experts get to work for you. Translate these trends into bold new ideas for your brand. Increase market share and get to your "what's next." Our technical flavor and product development experts are also at your service to help meet the labeling and flavor profile needs for your products to capitalize on this consumer trend. Let's mesh the complexities of flavor with your brand development, technical requirements and regulatory needs to deliver a complete taste solution.

From concept to manufacturing, we're here for you — every step of the way. Contact our sales service department at 630.578.8600 to request a flavor sample or chat us up at

www.fona.com/contact-fona/