

American Sweet Tooth

The \$21.5B Sweetener
Sweet Spot



Chacalate
SWEETENED
WITH

MONK FRUIT

May 2020



Our Secret Sauce

Tastewise brings the power of data to the art of food and beverage intelligence. Our AI-powered SaaS platform analyzes billions of food data points to provide real-time insights for hospitality and food brands. This report is based on real-time data, sourced YoY through May 4, 2020.

Capturing the earliest signals of food innovation across three robust data sets, sourced from social media, menus, home recipes and more, Tastewise offers an unparalleled ability to analyze trends at the root.

Tastewise empowers leading food brands by providing them with data for business-critical decisions — from new products to marketing strategy.



4M

Home Recipes



5B+

Social Interactions



541K

Restaurant Menus



7000+

Indexed Ingredients



500M+

Data Points per Query

Some of Our Customers

Kellogg's

Campbell's

Nestlé

Coca-Cola

SENSIENT

Sugar Alternatives: A \$21.5 Billion Opportunity

Sweeteners hit the spot for increasingly sugar-conscious audiences (**sugar-free** is up +38% YoY), as well as diet-specific eaters: sweeteners are a good fit for low-carb diets such as **Keto** and **Atkins** (up +8% and +12% among consumers, respectively).

Although consumer interest in sweeteners is only increasing every year, **restaurants and recipes are not paying the category enough attention.**

- **Foodservice** - The past year saw a **-7% reduction in menu mentions** of sweeteners nationwide.
- **Home Cooking** - there is a **16% gap between supply and demand** in recipes using sweeteners; an additional **41K recipes** featuring sweeteners are needed to satisfy consumer demand for sugar alternatives.

Read on to understand the current state of the sweeteners market, and what sweet opportunities exist in today's dynamic food and beverage industry.

\$21.5B

Global
opportunity size
of the sweeteners
market

142M

Americans
are looking for
sugar
replacements

An additional

41K

Sweetener-based
recipes are
needed

Data Source: Tastewise; USA Nationwide; Social and Restaurant Data; April 2019 - April 19, 20. All data is YoY unless otherwise noted.

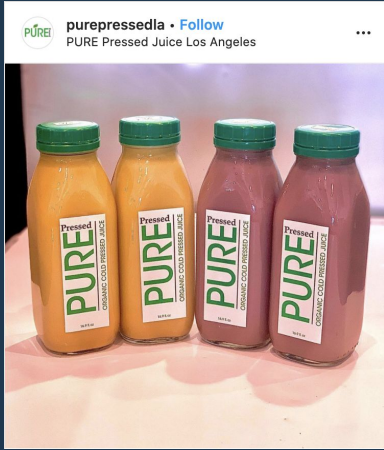
Economic opportunity size source: [MarketDataForecast](#); American sweetener audience size source: [Statista](#)

Please note: this report does not constitute legal or financial advice, and should not be seen as such.

Squeezed, Steeped and Sweetened

Coffee Shops and **Juice bars** are the first to adopt sweeteners

The simple, flexible preparation of beverages at coffee shops and juice bars allow these restaurants to easily experiment with sweeteners, bypassing time-costly recipe or dish development. Their focus on fresh ingredients draws a clientele that is open to (and often demands!) natural alternatives to processed sugars.



Hand-pressed almond milk with Xylitol, by PURE Pressed Juice LA

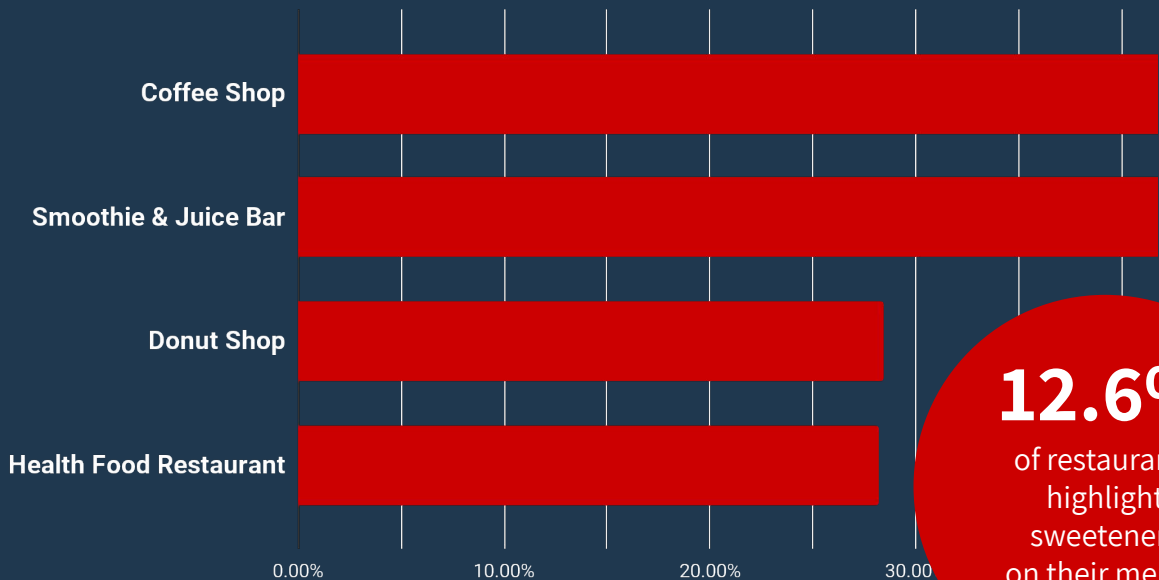


Reishi Cacao Latte with coconut crystals, by Wonder Press



Protein drink with stevia, by Oasis Nutrition - Modern Protein Café

Which restaurant categories follow juice bars in their use of sweeteners?



12.6%
of restaurants highlight sweeteners on their menus

Natural, Low-carb Sweeteners Draw Significant Attention

Consumers are interested in **natural sweeteners**, but restaurants fall far short in meeting consumer demand

Consumer interest in natural sweeteners is up **+85% YoY**; low-carb sweeteners are up **+42%**. Trending examples include:

- **Monk Fruit:** up **+183%** in popularity with consumers. However, the natural sweetener is unused in food service across the board.
- **Stevia:** up **+49%** in consumer interest. This sweetener is more commonly listed on menus than other sweeteners (0.23% of menus), and use is increasing over time.
- **Erythritol:** up **+80%** among consumers, but also missed by foodservice; very few restaurants claim it on menus.

Monk Fruit

+183% in
consumer
interest

Erythritol

+80% in
consumer
interest

6.4%

of restaurants highlight
natural sweeteners
on their menus

Stevia

+49% in
consumer
interest



Monk Fruit: The Sweet, Natural Star of the Show

Monk fruit, otherwise known as *lo han guo*, is now breaking into mainstream American consciousness after centuries of use in Eastern cuisines and medicine.

Over the past year, monk fruit jumped in consumer popularity by **+183%**.

The sweetener that does it all.

Monk fruit is **Keto-friendly, sugar-free**, and easy to adapt to diverse recipes; it has a versatile 1:1 refined-sugar substitute ratio, making it healthy with an indulgent taste. It has also recently gained significant attention in home cooking as an **immune-system** booster.

A significant opportunity for restaurants:

Monk fruit is only mentioned in a jaw-droppingly-low ~**200** restaurant menus nationwide. Restaurants owners, step into the gap!

Where to start?

At home, monk fruit is mainly used as a sweetener for desserts (26% of conversations about monk fruit center on desserts) and for adding a sweet note to seafood dish sauces (24%).



Monk fruit:
+443%
in consumer popularity as an immunity booster

only 200
restaurants nationwide offer monk fruit sweetener

3,300
recipes mention monk fruit

Monk Fruit in the Wild: Trending Examples

Monk fruit for anti-inflammatory needs



realfoodology • Follow
Los Angeles, California

Oh and one way to protect our health is by keeping inflammation low. A way to do this is keeping our sugar intake low. Sugar is not great for us and causes unnecessary inflammation in the body. This is why I use monk fruit as a sweetener in everything I make! Without further ado!
 🍪 SUGAR FREE, PB CUP GRAIN FREE CHOCOLATE CHIP COOKIES 🍪

2 cups almond flour
 1/4 cup melted butter or 1 egg
 3-4 grinds of Himalaya
 1/4 tsp
 1/2 teaspoon baking soi
 2 teaspoons vanilla ext

1,632 likes
 APRIL 29
 Add a comment...

Monk fruit in seafood dishes



forkmylifechi • Follow
Avondale, Chicago

This may not be the prettiest picture but this was damn tasty! If you have the Sunday scaries my answer is buffalo sauce and blue cheese! This time I made buffalo shrimp lettuce cups with cherry tomatoes, cucs, avo, @40aprons dump ranch and crumbled blue cheese! Also don't forget @daksspices Butt Kickin Buffalo spice rub and @thenewprimal Noble Made Buffalo Sauce in medium! I'm already thinking about when I'm going to make this again...

Buffalo Shrimp Lettuce Cups
 Makes 1 Serving * 1 tbsps salt
 * 1/2 tbsps monkfruit sweetener
 * 2 cups water
 * 5oz shrimp, raw, peeled and deveined

70 likes
 MARCH 10
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Monk fruit at juice bars



hannah.noms • Follow
RawASF

hannah.noms @rawasf_superfoods SUPERFOOD SMOOTHIES! 🥰🥰🥰 I got the Green Goddess (mango, spinach, pineapple, banana, kale, pea protein, sacha inchi, monk fruit, hemp protein, lucuma, alkalizing green blend (alfalfa grass, barley grass, wheatgrass)) 🌱🌱 & Blueberry Nice Cream (blueberry, strawberry, açai, coconut oil, hemp granola, flaxseed, vanilla, sweet red cherry) 🍷!!!! I got these a few days after I got my wisdom teeth removed, and it was such a relief to drink a yummy smoothie that gave me some nutrients at the same time! 🌈🌈 #rawasf

{#hannahnoms
 #superfoods #organic #powershake

288 likes
 MARCH 17
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Monk fruit in viral trends



healthyittlevittles • Follow

ICED MATCHA DALGONA LATTE

- 3 tablespoons aquafaba
- 1/4 teaspoon cream of tartar
- 2 tablespoons sugar (I used monk fruit sugar but you can use organic cane sugar)
- 1 teaspoon matcha powder
- ice
- plant milk (I used unsweetened hemp milk)

Instructions
 Using your Kitchen Aid or hand mixer, beat the aquafaba on high speed until it starts to foam up, about 5 minutes. Gently add the cream of tartar, sugar, and matcha powder and continue to beat until your foam is thick and glossy. Fill a mug/glass with ice and plant milk until it's about 3/4 full.

1,616 likes
 APRIL 28
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Monk fruit in restaurant desserts



thelotuscafebygogastudio • Follow
The Lotus Wellness Spot

thelotuscafebygogastudioandshop Sugar Free Keto Balls 🍪 A highly requested item from the cafe has been something that is sugar free and keto-friendly. While we are mindful with the natural sugar content in all of our treats and try to make it as low sugar as possible, we are happy to roll out this new item which is fully sugar free and keto-friendly! Our Keto Balls are sweetened with monk fruit syrup, which is an alternative to maple syrup. Add these to your next special dessert order or lunch to go!

Cauliflower Immunity Soup 🥰🥰 If you're looking for some lunch today, try our cauliflower immunity soup made with garlic and ginger. You can order a

41 likes
 APRIL 7
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SUGAR FREE
 KETO BALLS

Finding the Sweet Spot

Use **natural sweeteners** to fill industry gaps

Add monk fruit to your menu.

Restaurants should tap into the monk fruit trend and include the natural sweetener in their beverage and meal offerings -- before the space gets too crowded.



Haku San cocktail with monk fruit syrup

Nobu locations are using monk fruit syrup in their craft cocktails.

Expand sweetener use into home cooking trends, like baking.

The baking trend is up **+138% YoY** in popularity, largely due to quarantine; create baking recipes that include monk fruit!



Sourdough naturally leavened cinnamon rolls

Sourdough french toast with **monk fruit syrup** adds the natural sweetener to a home baking trend.

Bring transparency to your product.

Consider using sweetener ingredient names - like **monk fruit** - instead of just 'sugar-free', 'low-cal', or 'keto-friendly'. ingredient names attract customers and can increase engagement and loyalty.



Sugar-free, gluten-free water drops

Sweetleafstevia's water drops highlight stevia on the product packaging and in marketing.

A top-down view of various sweeteners on a dark wooden surface. In the top left, three skewers of golden-brown, crystalline candy. In the top right, a pile of dark brown, irregularly shaped sugar crystals. In the center, a pile of white granulated sugar. In the bottom left, a pile of light brown, granulated sugar. In the bottom center, a pile of white, rectangular sugar cubes. In the bottom right, a pile of light brown, rectangular sugar cubes.

**Ready to explore how
sweeteners impact your
business?**

**Find your competitive edge on the
Tastewise platform.**

Get Started Today

