THE NEXT WAVE Trends, Issues & OPPORTUNITIES

Presented by:



June 10-13, 2019

Conference: June 10-13, 2019 Exhibit Hall: June 11-13, 2019 LAS VEGAS CONVENTION CENTER

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Join us at World Tea Expo 2019 in Las Vegas!

Discover hundreds of new tea products, participate in educational sessions and workshops, learn from experts and participate in numerous networking opportunities.

Attendees include top companies and professionals from more than 50 countries, representing:

- Tea Businesses
- Gourmet & Specialty Retailers
- Tea and Coffee Houses
- Restaurants, Foodservice, Chefs
- Hotel F&B
- Grocers, Mass Merchants
- Distributors and Suppliers

- Private Label Brands
- Beverage Developers
- Manufacturers
- Online Shops
- Spa Managers
- Natural Product Businesses
- Tea Enthusiasts, and more!



Worldteaexpo

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THE NEXT WAVE IN TEA ARE YOU READY TO BEGIN?



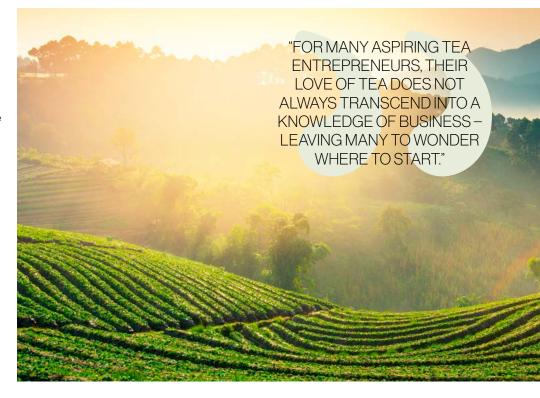
By Dean Jablon

There may be no better moment in the history of time to be in the tea business than right now.

As scientific research continues to validate the health benefits of regularly consuming tea and herbs, consumers are becoming more aware of the need to support a healthy lifestyle. Seniors are a rapidly expanding market with millennials representing the fastest growing segment of tea consumers in the market today.

With all of these emerging markets, opportunities abound for anyone with a passion for tea and basic understanding of business to reach a broad range of consumers in this growing space.

For many aspiring tea entrepreneurs, their love of tea does not always transcend into a knowledge of business – leaving many to wonder where to start.



Ask yourself these nine questions when you are ready to begin:



- 1. What products do I want to sell?
- 2. With so many products on the market how many of each category should I have?
- 3. Should I only source organic products?
- 4. How do I know if my supplier is providing me a fair price?
- 5. How do I set my pricing model to insure my business will be profitable?
- 6. Do I want to sell products from other suppliers or create my own personal brand?
- 7. What are the best sales funnels for generating new customers (SEO, Amazon, retail, wholesale, website, restaurants, etc.)?
- 8. Should I incorporate or can I operate as a sole proprietor?
- 9. What is the best platform for my website?

Please join me at the World Tea Expo 2019 as I share with you seven steps for building a successful online tea business. I will cover many of the items mentioned, as well as other materials you will need as you take the first step into this exciting and highly profitable journey.

Dean Jablon is an internationally recognized tea expert, marketing leader and speaker. He advises clients from around the world about the challenges and trends impacting the tea industry. His pragmatic, action-oriented style inspires people to apply common sense and business rigor to launch their online tea business focused on profitability, efficiency, and customer satisfaction. He's accredited by the Specialty Tea Institute as a Level One Tea Specialist and Certified Tea Sommelier with more than 13 years of experience operating a successful online tea business. Jablon also works on business development at Lifetime Tea. See LifeTimetea.com.



TEA 3.0 IS HERE INNOVATION IN THE TEA MARKET



By Joe Gagnon

When familiarity meets innovation, big things happen,

and the tea market is poised for innovation. The headline reads: "Consumers want to be able to make better choices about what they drink." They want good taste, convenience, and it has to be good for them. In our time-starved lives, this is a challenge which is, in fact, the opportunity for the tea industry to step in and give consumers what they want.

Convenience is the new normal, a driver of loyalty and repeat purchase. Designing tea products to be easy to consume on the go, anytime, anywhere, hot or cold, is a key to innovation. Instant extract powders in a jar or stick-pack allow the consumer to make a drink in seconds, just add water and everything gets better.

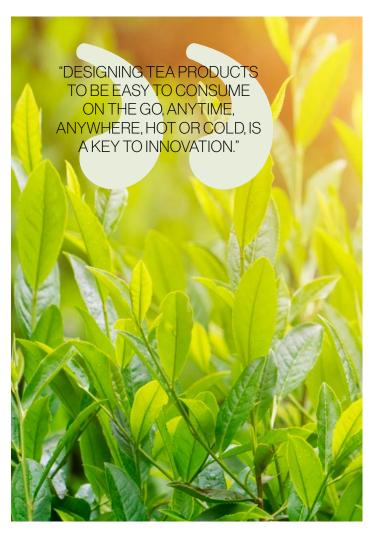
Functionality is about the purpose and benefits of the drink of choice. Tea designed for activity, stress management, pain relief and physical adaptation are all enabled by ingredients like Adaptogens and CBD, which makes tea better.

Aspiration – we all want to associate with an aspirational brand. Innovation is not only in product and packaging but also in community and purpose. Positioning tea to power world-class sporting results and enable, dreaming and doing, fits with the way generations are evolving and what they expect from products they buy.

Active consumers are gravitating to clean labels, no sugar and functional and nutritional ingredients such as turmeric, CBD and Reishi. With skillful formulation, it is possible to create a tea that tastes great is healthful and convenient.

The future tastes awesome and is convenient, nutritious and enables us to be better. Tea 3.0 is here, and we call it "Performance Tea!"

Joe Gagnon is an adventurer, entrepreneur, innovator and co-founder and CEO of Performance Tea. Performance Tea's mission is to help people achieve their potential. Through a combination of Eastern herbal expertise and Western empirical testing, the company has come up with the single most powerful combination of tested, adaptogenic and CBD teas anywhere on the market today. Gagnon is also the author of Living the High Performance Life, An Ordinary Joe's Guide to the Extraordinary. Gagnon is also a passionate endurance athlete. He has completed six Ironman triathlons, 60+ marathons and ultra-marathons and, in 2017, he ran six marathons on six continents in six davs. See PerformanceTea.com.





ENCOURAGING THE NEW TEA WAVE, WITH A CHANGE IN ATTITUDE

By Andrés Jurado

Tea, like most products, faces the commercial need to adapt effectively and efficiently to the speed with which consumers change their preferences and consumption patterns.

Tea's next wave must obey guidelines and principles that are consistent with the very essence and mysticism that characterizes this drink itself.

As in any other commercial relationship, there are always several stakeholders and, unfortunately, in many occasions, their interests are contrary to one another. For instance: Producers want to lower their costs and, often, this implies paying unfair salaries or using agrochemical products that pollute and harm the environment. Brands

want to offer "great quality" products, but they're not always willing to pay just prices for the raw materials. And ultimately, this attitude is mimicked by the final consumer.

We must launch and encourage a new wave that promotes a change in attitude with regard to the consumption patterns.

Tea's new wave must be built on consumers who are much more aware of what they're drinking, much more informed and, therefore, much more willing to pay just prices for the product they're receiving.

The only manner in which to begin a change is to spur on a grand wave of knowledge and awareness, based on information and knowledge. The consumers must undertake the task of knowing and understanding deeply that which they're buying, understanding the production processes as fully as possible, and understanding all that is implied for a tea to possess certain characteristics, which can have a direct impact on its price.

Tea's next wave must foster the edifice of solid grounds in terms of consumers'

knowledge and further each consumer's awareness about the true essence of tea, and to strengthen the characteristics of such a magical beverage.

Andrés Jurado is CEO of Escuela Mexicana de Té and Tian Té. Escuela Mexicana de Té is the first academic institution in Mexico dedicated to teaching and promote tea culture. Since 2013, the EMT has graduated more than 250 students from its different programs. The Tian Té Tea Shop and tea brand is consumed and marketed in more of 100 of the most prestigious hotels and restaurants in Mexico. Jurado is also a tea sommelier, tea designer and expert in tea ceremonies. He's an advisor and brand spokesman for Mexico for the prestigious British tea brand Twinings, and as an entrepreneur, he fall in love with tea culture in 2011, and in 2012 he founded Coporativo Tian de México with Ariana Jurado and Cecilia Corral. Learn more at Tiante.mx and Escueladete.com.mx.





TRENDS & OPPORTUNITIES IN THE NEXT WAVE OF TEA



By Sharyn Johnston

Things are changing rapidly in the tea world. By listening to what customers want and anticipating trends, we are shaping the industry for the next generation of tea lovers.

Due to its perceived health benefits, tea is becoming even more popular in 2019, particularly green tea and tea blends. Consumers are now more likely to buy products containing natural ingredients and natural flavors blended with tea, and companies are constantly experimenting with unique and more unusual, innovative ingredients.

Developing blends for private labels is a big growth area, giving a business a unique identity, as people move away from the more well known, traditional, commercial brands. Bubble tea and cheese tea are still growing in popularity and are expected to increase in market share worldwide by 2023. These are joined by ready to drink (RTD) teas such as Kombucha and wellness tea blends in a

The relationship between tea and food is trending with pairing menus and tea infused foods available at more restaurants. Some businesses are showcasing tea's versatility by offering teas on tap, alcohol inspired blends and tea cocktails, with tea served in different ways such as in a wine glass. Alternate brewing methods traditionally used only with coffee, the Chemex, V60 and BKON Brewer for example, are also being used by baristas to brew tea. This has led to an increase in the variety of specialty tea offerings and is the driving force for creativity in the café industry.

Tea menu options are growing with the information available to the customer following the trends of the specialty coffee industry. Information like farm details, including the farmers names, the farm location and terroir, including tasting profile notes, are now more necessary to educate the consumer.

Modern and innovative approaches to brewing and serving tea, offering blends with unique ingredients and showcasing tea's diversity will appeal to a wider audience and position loose leaf tea as a specialty beverage worthy of higher price on menus and retail shelves. Tea bags will always have

a place in the market, but there is a lot more focus on biodegradable fabrics and pyramid bags showing the leaf quality.

Sharyn Johnston is founder and CEO of Australian Tea Masters, which is now the leading organization for tea training, tea blending and tea education in Australasia.

Johnston is also an advisory board member for the Tea Masters Cup and a head judge. She's a member of the Chinese Tea Experts Committee and was given a special award from the Cultural foundation in Korea for her contribution to the development and promotion of Korean Tea culture. See AustralianTeaMasters.com.au.



PROMOTING A TRUTHFUL TEA EDUCATION TO ALL STAKEHOLDERS

By Cecilia Corral

The growing demand for tea in the western world has given rise to many myths and misinformation in relation to this wonderful beverage.

Due to the inherent characteristics pertaining to tea, it is nearly impossible to fully know each and every single detail surrounding the cultivation, manufacture and marketing of this product. This is an ideal excuse for many so as to not deal with the problem and to remain content with shallow and, at times, loose information on the subject.

It is of the outmost importance that the new wave of tea promotes a deep, precise and truthful education to all stakeholders about the different stages of production and commercialization of tea – as well as the mystique, traditions and magic that surround tea in its countries of origin.

Without a doubt, a more informed industry will always be at the leading edge and shall propose honest, authentic and innovative products to the consumers. On the other hand, more informed consumers will demand products of higher quality and will be willing to pay just prices for them.

The organizations, institutions and people who have dedicated their time, economical resources, and interest in learning and transmitting the culture surrounding tea, must grow into a much more important role in the industry. Then again, they must act ethically, honestly and responsibly, maintaining their distance from commercial interests as much as possible.

Tea's new wave should establish its foundations not only on technical knowledge, but also in the mystique and the very essence of tea.

Let's take the challenge in our own hands!

Cecilia Corral oversees the development and research for the programs of the Escuela Mexicana de Té, and she's also a teacher for the tea sommelier and tea designer programs. Escuela Mexicana de Té is the first academic institution in México dedicated to teaching and promoting tea culture. Since 2013, the organization has graduated more than 250 students from its different programs. In 2012 she helped found Corporativo Tian de México with Andres and Ariana Jurado. She has visited tea plantations in Argentina, Sri Lanka, Taiwan and Japan, and has participated as a speaker in universities and conferences promoting tea culture history and culture. She has a bachelor's degree in business from Universidad La Salle. See Tiante.mx and Escueladete.com.mx.





A NUTRITIONIST'S OBSERVATIONS A MUSINGS ON THE FUTURE OF TEA



By Michelle Pierce Hamilton

The world is growing in its consciousness, of all things related to food and health and the health of our planet. It has become clear that as a species we must do things differently, and that includes all aspects of our food supply, including tea. As a nutritionist who relies on evidence to coach students and clients, the evidence increasingly shows that the same practices that yield foods of the greatest nutritive value are the same practices that increase the nutrient density and health potential of tea.

I've shared conversations with conscious tea farmers, who already share this mindset. I've met the Chens in Anxi who labored over several years to convert an oolong farm to completely natural organic farming (free of agrichemicals) to bring renewed reputation to the region's tea. I've conversed with Kenvan farmers who value natural farming practices as not only the most economical, but also producing the best tasting leaf. In Hawaii, forward thinking, conscientious farmers such as the Ino's are going beyond organic - embracing permaculture over monoculture, and allowing the land to give and take what it knows best for the very best tea and all other surrounding nature, in communion.

The same forces that moved consumers toward increasingly organic foods on their plate are the same forces moving consumers toward organically farmed teas. However, as the issues in play become more complex, the consumer also becomes more discerning. The new generation looking for regenerative agriculture and zero waste from the foods on their plate will be seeking the same accountability in their cup. They will demand evidence beyond a logo on a package that what they're buying is both clean and fair. Verifiable stories and evidence take a greater role with conscious buyers over slick marketing. People are looking for connections with their food and their tea, and they value experiences that make them feel like they made a healthier choice, and that their purchase supported a system that makes a positive difference.

Michelle Pierce Hamilton is a Registered Holistic Nutritionist (RHN) and Certified Canadian Tea Sommelier. A teacher and facilitator at heart, Hamilton is a faculty instructor at the Canadian School of Natural Nutrition and was formerly an instructor of the Canadian Tea Sommelier Certification Program at London's Fanshawe College.

Nutrition as her foundational passion, she remains current on the latest research on tea and human health and is presently involved in new tea and nutrition research with Montana State University. She is also the owner and founder of be Teas Inc. and The Tea Lounge in London Ontario. Visit be Teas.com.

"THE SAME FORCES THAT MOVED CONSUMERS TOWARD INCREASINGLY ORGANIC FOODS ON THEIR PLATE ARE THE SAME FORCES MOVING CONSUMERS TOWARD ORGANICALLY FARMED TEAS."





TRANSPARENCY AN OPPORTUNITY FOR GROWTH



By Tony Gebely

Connoisseurs in any industry drive innovation and growth. This is especially true in the world of tea. Simply by their discerning taste, they play an important role in marketing, educating others, sharing their favorite teas with friends, and acting as influencers in real life and on social media.

Connoisseurs are captivated into action by exciting teas. Perhaps a traditional tea that exudes supreme quality, a tea that has a very interesting story, or one that is new and experimental.

Thus, cultivating a connoisseur culture will lead to growth in the specialty sector of our industry, which will in turn lead to a rise in all sectors of the tea industry. Unfortunately, I believe that true transparency is the key here and as an industry, we're off the mark.

It is no secret that the connoisseur culture that exists in the wine industry dwarfs the connoisseur culture that exists in tea. The main difference between the two products (other than one contains alcohol and gets you drunk), is access to provenance. Aside from a counterfeit here and there, in the

consumers hand, wine is packaged in a bottle and labeled. Provenance is known.

Provenance is typically concealed for tea. And one doesn't have to look far to discover that there are many companies selling teas made by the same producer under different names, or different prices. And no doubt some even falsifying place of origin.

This is troublesome for connoisseurs – how can we do comparative tastings of similar teas? How can we discover the soul of a tea? How can we determine the value of a producer's vintage from year to year? How can we expand our palate? All we have to rely on is our trust in our supplier.

We achieve true transparency when the name and the specific location of the producer is shared with the consumer. Additional information may supplement this information – such as elevation, cultivar or processing methods used, adding value.

If this information reaches consumers, we'll see marked growth in the connoisseur culture surrounding tea, as tea epicures will be able to better educate their palate and further their interest in and knowledge

of specific teas. As a result, our industry will prosper. This benefit will outweigh the perceived detriment of revealing a source. And a great side effect of true transparency, is that the producer receives the accolades they deserve.

Tony Gebely is the executive director of the American Specialty Tea Alliance, which is a non-profit business association aimed at growing the specialty tea industry in America. Gebely is also the founder of Tea Epicure, a global producer-focused tea assessment platform. Throughout his 13 years in tea, Gebely has worked for many leading tea companies, helping them navigate the specialty tea sector. During this time he started the two-time World Tea Award winning website, World of Tea, which has produced well-researched content on tea since 2009. Having traveled extensively through tea-producing regions during his life in tea, and having a degree in computer science, he developed a pragmatic approach to tea which led him to write his 2016 treatise, Tea: A User's Guide.



THERE'S STILL PLENTY OF ROOM TO GROW FOR TEA

By Tim Smith

In late 2004 when we opened The Tea Smith, specialty tea was just beginning to become a "thing." Local sources for tea were often British-style tea rooms or Asian tea houses. Teavana was just starting to grow regionally. The main trade show reflected this stage, "Take Me to Tea."

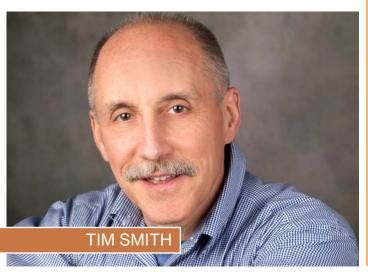
Fast forward to 2019. Local sources for specialty tea have expanded, especially in format. Traditional tea rooms still occupy a special place in many communities. Contemporary formats abound, tea and cocktails are trending now. Tea-inspired drinks and food are the base for many shops. The Internet is densely populated with tea sites. Type in 'green tea' on Amazon and you are fed more than 70,000 entries!

Despite all the noise and competition, tea still has plenty of room to grow in the consumption habits of American consumers. But looking at the ups and downs of the market, from the failure of Starbucks to capitalize on their acquisition of Teavana to the shuttering of stores from L.A. to N.Y. and the disappearance of national brands, the need for a solid business plan and business model are critical in the dynamic marketplace. One must define

the value proposition, and how it will be delivered, then do the research to determine if the target market needs those and is large enough to support the goals of the organization.

That is the starting point. Companies that will survive and flourish 10 to 20 years or more must continue to adapt in response to changes in consumer tastes, market structure and the regulatory environment. The enjoyment of tea may be over 5,000 years old but that does not mean our opportunities have all been uncovered in those years.

Tim Smith holds an MBA from Creighton University. He has been an active proponent of small business and entrepreneurs, having served as a delegate to the White House Conference on Small Business and other not-forprofit organizations. Smith has presented at numerous venues including the Midwest Tea Fest and World Tea Expo. In 2012, he was named the "Top Tea Infusionist." Smith is currently the chief leaf at The Tea Smith in Omaha, Nebraska. The Tea Smith has retail shops in Omaha and is a wholesaler and importer of teas and herbal infusions to fine restaurants, coffee shops, tea rooms, spas and health stores.





By Don Ho

The tea industry

overall has remained in the shadow of the rest of the food and beverage industry, always two or three steps behind the first-movers. Cold-brew coffee, sparkling water and non-dairy milk industries (to name a few) have built a firm foundation of innovation on which to construct a cohesive message with consumers, and it is one that is resonating.

The cold-brew coffee category in the United States alone grew 100 percent between 2016 and 2017 (source: Euromonitor). Tea has had some successes matcha and kombucha have been two of the largest drivers of tea innovation in the past decade. There is an opportunity for tea to continue capitalizing on growth as a forward-thinking industry, as long as its proponents stop looking to the past and constantly leaning on tradition and tea is primed and ready to do so.

For example, there is consumer demand for food and beverage products to incorporate more health and wellness attributes. Unfortunately, in most product formulations this means sacrificing on overall taste. Tea and tisanes, across all CPG formats, are uniquely positioned to deliver the perfect marriage of flavor and functionality. Investments in wellness industries have made it possible for products to go beyond just the "traditionally used for..." claims. Now it's feasible to incorporate measurable, beneficial efficacy into tea products through ingredients such as shelf-stable probiotics, vitamins and caffeine extracts.



Tea is one of the first discovered wellness beverages and it is still riding that wave in consumer perception, however, the industry should not stay stuck in the past – the customer is not looking at what tea once was, they are looking for what tea can be.

Don Ho is the founder and CEO of Harmony Tea Bar, a chain of tea shops based in Orange County, California. After a decade as a practicing attorney, Ho discovered his passion for tea and decided to turn his hobby into his career, establishing Harmony Tea Bar in 2014. The mission at Harmony Tea Bar is to introduce local communities to the wonderful world of tea through top-quality education, products and services. Harmony Tea Bar has seen tremendous growth in the short time it has been established - 14 consecutive quarters of growth and the opening of two more locations in 2018. Follow them on Twitter, Facebook and Instagram: @harmonyteabar. Visit HarmonyTeaBar.com.



A LOOK AT AUTHENTICATION TESTING FOR TEA



By Jane Pettigrew

In recent articles about transparency along the tea supply chain, DNA fingerprinting has been claimed to be the way to give tea consumers accurate and honest information about the teas they buy.

way to give tea consumers accurate and honest information about the teas they buy. It has been stated that DNA testing can give accurate information about which varietal or cultivar a tea has been made from and where it was grown.

However, according to Dr. David Burslem, of the School of Biological Sciences at Aberdeen University, Scotland, although DNA testing gives very precise information on a plant's genotype (i.e. variety or clone), if that variety is grown in multiple locations then it says nothing about geographical origin. For example, a Georgian tea variety grown in Georgia and Scotland will come out as identical using this method...."

In order to prove whether a tea was truly grown where it is claimed to have been grown, Dr. Burslem, working together with the Scottish Tea Factory in Perthshire, has developed an "ionomics" test that can be used "to differentiate teas grown in different locations based on differences in the elemental profile of the soil." A

pilot authentication project successfully demonstrated that tea grown in Scotland can be clearly distinguished from within a group of 80 tea samples sourced from elsewhere overseas. The term "ionomics" refers to the unique elemental profile in any organism and the understanding this gives of the ways in which this profile has been determined by external environment and sources of nutrition. Similar recent studies in China have also shown that the geographical origin of tea can be authenticated using techniques that analyse multiple micronutrients and trace elements within samples, and this identifies differences in the concentrations of elements between teas sourced from different locations with different soil conditions.

This method of analysis is relatively cheap and simple to carry out and has very important implications for the tea industry, particularly for the increasing number of new growers with regard to provenance and authentication. Such authenticity testing paired with an appropriate labelling system would differentiate genuine single origin teas from "fakes" and blends, and will help dispel the confusion and misinformation currently associated with some single origin teas.

Jane Pettigrew has worked in the world of tea since 1983. After owning her own tearoom, she become a freelance editor, writer, trainer and consultant to various organizations and tea companies, including the UK Tea Council, the Indian Tea Board and Twinings. Over the years, she has written for various magazines and websites, including Tea and Coffee Trade Journal, Tea and Coffee Asia, Fresh Cup, Tea - A Magazine, STiR Tea and Coffee Magazine, World Tea Media and TeaTime Magazine, for which she is a contributing editor. She has published 17 books on tea, the most recent of which is Jane Pettigrew's World of Tea. This was published by Hoffman Media in June 2018, at World Tea Expo, where it won Best New Product in the Publications and Books category.

"IT HAS BEEN STATED THAT DNA TESTING CAN GIVE ACCURATE INFORMATION ABOUT WHICH VARIETAL OR CULTIVAR A TEA HAS BEEN MADE FROM AND WHERE IT WAS GROWN."





FAIRNESS IN TEA

By Nigel Melican

We have all at some time purchased a pack of fair-trade tea, believing or hoping that some of the higher price percolates down to the small farmer. Very often, however, the premium you pay evaporates down the value chain and never reaches the intended origin.

There is a better way that's trending to ensure everyone along the chain is treated fairly – a new twist on an old idea – the co-operative.

Tea grower cooperatives are not uncommon; the Kenya Tea Development Agency is a co-op of 560,000 smallholders, and 400,000 Sri Lankan small farmers are in co-operatives. These groupings are beneficial agriculturally but, in common with most grower co-operatives, they are only open to direct participants - the farmers. This separates farmers from the downstream value chain: it isolates them from the ultimate customer - the source of wealth entering the chain.

For the past three years, I have worked with the Hawaii Tea Cooperative, which operates on a much fairer system – the Consumer Cooperative. This type of not-for-profit organization allows membership of all players in the value chain: grower, processor, packer,

retailer and even the customer, thus bringing very broad expertise into the organization. As all players along the chain can be members by buying at least one co-op share, then each link in the chain is active in promoting the interests of the whole chain, because to benefit one is to benefit all. Under U.S. law, the Consumer Cooperative can pay dividends to its members, who can even be purely financial investors, but for the protection of all its members nobody can own more than 19% of the shares. And regardless of the number of shares owned, whether an individual farmer or a large corporation, each member has only one single vote.

This seems to me the very essence of fair trading – a transparent way for consumer members to ensure fair play for the tea growers.

Nigel Melican is proud to boast having manufactured black tea on six of the world's seven continents. He now concentrates on helping to develop nontraditional tea growing origins – in the United States and Europe – and innovating to solve the novel challenges of growing fine specialty teas under some very marginal climatic conditions. Visit his website: TeaCraft.com.



MAXIMIZING THE NATURAL BENEFITS OF TEA

By Matthew Barry

In the coming years,

the distinction between teas designed for enjoyment and those designed for health will continue to blur. Given the natural benefits of tea in pure form, consumers can focus on finding varieties they really enjoy while also indulging regularly without feeling guilty.

Functional teas have also shifted from targeting specific health concerns to focusing on more general, everyday health goals like "relaxation" or "energy." As part of this, manufacturers are creating flavors that are enjoyable to keep consumers coming

back.

I would even go further and say that a tea should be something you enjoy to really maximize its health benefits. Wellness is about mind as much as it is body. Taking a moment to relax with a tea that you enjoy is valuable in of itself, regardless of what is contained in the actual tea. People involved with tea understand this guite well, and that will underly a lot of activity in the tea segment in the coming years.

This is all particularly true of herbal teas, which are leading growth in North America, according to Euromonitor International, but it is broadly true across all tea categories. Teas, whether herbal or not, that are premium and wellnessoriented are doing well and those that are not will continue to struggle.

Matthew Barry is senior beverages analyst at Euromonitor International, specializing in the global hot drinks industry. His insights have appeared in such publications as The Wall Street Journal, The Economist and The New York Times, and he speaks regularly at major industry events. Barry holds a degree in international relations from Knox College and has been with Euromonitor International since 2015. Visit Euromonitor.com.



"TAKING A MOMENT TO RELAX WITH A TEA THAT YOU ENJOY IS VALUABLE IN OF ITSELF, REGARDLESS OF WHAT IS CONTAINED IN THE ACTUAL TEA."



TEA AS A HERALD OF HEALTHY LIVING



By Suzette Hammond

An emerging opportunity for tea that I see in my work branches off from an existing trend: tea for overall wellbeing.

We've been giving so much attention to functional teas or wellness blends, looking at tea in a transactional nature. A "take this for that" type of thinking. Of course, blends are very creative and definitely tap into this exploration of natural health that has so captivated Americans in recent years.

But in our endeavor for label claims and better laboratory analysis of components and so forth, we're still missing the deeper side of how tea is enjoyed already as a mindfulness practice – and has been for centuries. Further, this is something that can be actually trained. It's not a passive benefit of tea. it IS tea.

Mindfulness training has been shown clinically to assist with reducing stress – and stress related issues are the No. 1 reason why patients visit their GPs. There is an opportunity for tea here to interact with healthcare systems, wellness/fitness groups, and mental health advocacy as a means of offering their clients a stabilizing practice that calms the nervous system, restores a sense of being grounded and secure, and assists with better breathing. That's just scratching the surface of it, too.

I have been teaching tea meditation in a wide range of settings for years: private and public groups, in settings both corporate and studio, for clinicians and community rebuilding organizations. There is much work to be done here, as people are eager to learn about mindfulness in non-intimidating ways, and tea already comes with a warm glow of being perceived as being a herald of healthy living.



Suzette Hammond is the founder of Being Tea, an education-focused private practice offering professional training, workshops and project consulting for tea programs. Hammond has traveled extensively as an educator for more than 15 years, and spent many years managing training programs for leading U.S. tea companies before creating Being Tea in 2015. She serves as an executive for the American Specialty Tea Alliance (ASTA), and collaborates with the International Specialty Tea Association (ISTA). She is also a trained journalist, a tea ceremony student, teaches tea meditation and mindfulness, and is a 200-hour yoga teacher certified in psych-sensitive yoga. In 2018, Suzette received the World Tea Award for Best Tea Educator.

"THERE IS AN OPPORTUNITY FOR TEA HERE TO INTERACT WITH HEALTHCARE SYSTEMS, WELLNESS/FITNESS GROUPS, AND MENTAL HEALTH ADVOCACY AS A MEANS OF OFFERING THEIR CLIENTS A STABILIZING PRACTICE THAT CALMS THE NERVOUS SYSTEM, RESTORES A SENSE OF BEING GROUNDED AND SECURE, AND ASSISTS WITH BETTER BREATHING."



mirrors this trend.

PRIVATE BRANDS TEA ARE TAPPING INTO CONSUMER DESIRES



By Jason Walker

Considering that roughly 80 percent of all tea is currently purchased through grocery and supermarkets, private brand teas will significantly affect the future of tea purchases. Industry leaders see how 40 percent of grocery/retail purchases in Europe are private label, and believe it is not a question of IF but WHEN the United States

These private brands are taking market share from the national brands by building greater consumer trust and better tapping into tea drinkers' desires including natural/organic products, sustainability concerns, great taste and functional benefits. Private brands are finding their niche between greater value and more premium product.

This rising tide of premiumization can help raise all tea boats. Opportunities exist

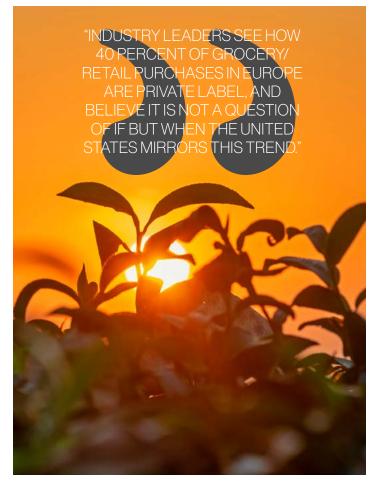
anywhere the next tea business can carve out a minimum viable audience and deliver MORE:

- · More connection to origin
- More distinct lifestyle benefits/ experience
- More sustainability/traceability
- More craftsmanship (e.g. quality, flavor, etc.)
- More convenience

The effects of these changes will impact all forms of tea businesses, as consumers become more selective about the teas they drink in and out of home. Changing expectations will raise the bar for onpremise teas. Consumers will expect cafes and coffee shops to match or beat the

quality of tea they can pick up at any corner market.

Jason Walker is the current marketing director of Firsd Tea North America. Prior to his work with Firsd Tea, Walker served in a variety of roles in tea and education capacities. His 10 years of tea and beverage business experience includes business services for small tea companies, a topranked online destination for tea consumer education, and co-founding a coffee business. Additionally, Walker served in various roles in both public and private education, including college and private education instructor, and project manager for corporate training companies. His insights draw upon his diverse range of experience in sales, operations, and management. They have enabled him to bring a broader range of solutions and learning to the tea world. Visit FirsdTea.com.





A VERY PROMISING PROPOSITION FOR THE TEA TRADE

By John Snell

If SKU launches and M&A activity are the trend barometer then

tea is moving towards being a vehicle for health and wellness over and above simply a refreshing and tasty beverage of infinite variety. This new "reason to steep" has been accompanied by a positive impact on prices that people are prepared to pay for this elixir "tea." Yet, the original species defined by this catchall noun is not the main beneficiary of this acclaim! Ironically, the tea that industry has spent millions of dollars on researching for healthful benefits is missing from the ingredient statements of these efficacious brews and, while prices are jumping at retail. the plantation sector is in the doldrums with too much tea of the wrong type AGAIN!!

So what is right? The specialty trade has promoted and sold quality tea successfully! For all the right reasons (variety, flavor, goodness) and for good money which has brought focus, protection and improvements to technical quality manufacture at origin. The volumes are still relatively small but by reconnecting improved phytochemical production with better quality tea we can harness the trend of the health and wellness sector, bringing mass and efficiencies to specialty production, in order

to meet the pricing criteria of the sector. This may seem reprehensible to some, the very thought of bringing mass to this rarefied atmosphere, but there is another responsibility we all share, that is the social impact of our industry. There is no doubt that there is too much tea grown today but change needs to be designed, proactive and thoughtful; we need to have tea origins invest in diversified quality raw material production, protecting them from a fragile monoculture while bringing more of our desired raw materials (teas and tisanes)under efficient supply chain models and quality control.

The opportunity is that specialty has come of age and is now "the tea industry," and as such has a voice to discuss and act on industry wide responsibilities; coming from a place where sustainability and social equity were first promoted, this is a very promising proposition for the tea trade!

John Snell has worked in tea for over 35 years. In his time, he has bought and blended for major companies in the U.K. and in North America. Most recently, he served as director of product development (all categories), sustainability and tea procurement for Mother Parkers Tea and Coffee Inc. He loves tea with a passion, bordering

> on obsession, and loves to help others develop winning programs in tea and ethics through his consultancy NMTeaB, an acronym that speaks to his no nonsense approach. You can connect with Snell on LinkedIn.



TEA IS PLAYING A STARRING ROLE IN CREATIVE WAYS

By Katherine Kern

The tea industry continues to grow through consumers attracted to the taste, ritual and health benefits of tea.

New over the last couple of years, and continuing to grow dramatically, are the number of consumers attracted to tea through innovation or experiences driven by other industries.

We've seen a lot of innovation using tea as an ingredient, especially in cocktails, beer and cider, as well as baked goods. A few years ago, you might have occasionally seen an Earl Grey cocktail or matcha

cheesecake, but bartenders, bakers and brewers are getting really creative with the range of teas and flavors they are experimenting with. In many cases, unique teas now play a starring role, and this helps people who have previously never considered drinking tea to seek out the flavors they enjoyed in a tea infused cocktail, beer or cake.

We've also seen an increase in the number of consumers who discover tea through experiences such as tea and chocolate pairings, or classes focused on learning a craft but also including a tea tasting.

Through these experiences, they are learning as well as tasting, further enriching the experience.

Over the last year, we've experienced a lot of growth by partnering with other industries and organizations. We believe this growth will continue as tea enhances other experiences



and becomes even more popular as an ingredient as well as a beverage.

Katherine Kern is a Certified Tea Professional who has lived, worked and traveled extensively across Europe and Asia, experiencing and learning about tea ceremonies, production methods and culture first-hand. She is a founding partner of Churchill's Fine Teas, a Cincinnati, Ohio-based tea retailer specializing in loose leaf tea. She holds an MBA from Cass Business School in London. Visit Churchillsteas.com.



EMBRACE DATA & PREDICTIVE ANALYTICS FOR TEA MARKET SUCCESS

By Patricia Peiffer

Who wouldn't like to predict the future of business? Which products will be the best sellers? Which segments will be the most profitable? Which communication message will be most impactful? What price will maximize profit or defend against competitors?

While some may consult a crystal ball, successful organizations use a strategic approach that includes predictive analytics.

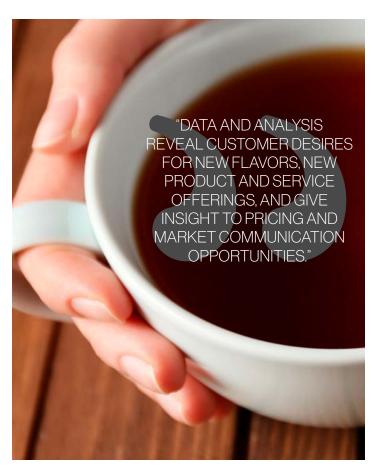
Increasingly, organizations interested in predicting their future success invest in aggregating, organizing and analyzing reliable data, facts and statistics, better known as predictive analytics. The results enable managers to identify market trends and quantify customer buying behavior, thoughts, and emotions to clear the clouds of uncertainty for vision clarity. With clear vision, owners and managers can

confidently make decisions and take actions to influence, improve and increase future success. Simply put, they unleash the power of predictive analytics for business success.

The use of data and information enable decision-makers to predict customer behavior such exiting of existing customers [migrating] or entrance of new customer segments [emergent] for accurate planning. Data and analysis reveal customer desires for new flavors, new product and service offerings, and give insight to pricing and market communication opportunities. Forward thinking decision-makers use data to segment customers by demographics and psychographics in effort at creating meaningful communication for revenue generating marketing campaigns.

Consider a recent Euromonitor International report providing insight to the future tea market. Reportedly, mature markets will experience difficulties in growing sales, but have potential to transform consumers of mass-market tea to purchasers of high-quality tea. Capitalizing on the information requires predictive analytics to deeply understand customer factors (demographic, psychographic, geographic) and develop products, services and communication strategies that either influence the emerging segment of consumers for high-quality tea products or defend against consumer migration from mass-market tea.

Patricia Peiffer is principal and senior research analyst at Quesited, a market research and competitive intelligence strategic partnership. Peiffer is intensely curious about markets and the players. With an eye in the sky, ear to the wind and feet on the street, she seeks out emerging trends and migrating segments that impact client business. She engages associative thinking to link disparate information for insightful action, new business opportunities and improved customer and user experience and increased engagement. She studied marketing management and holds a master's of science degree with a concentration in marketing research from Rensselaer Polytechnic Institute, and is a graduate of the University of Connecticut.







KOMBUCHA THE TREND THAT JUST WON'T END



At World Tea Expo,

it will come as no surprise that the hottest new beverage trend is tea based. Kombucha, an ancient elixir produced by fermenting sweetened tea with a SCOBY (Symbiotic Culture of Bacteria and Yeast) is a sweetsour natural beverage with a host of organic acids, digestive enzymes, vitamins, polyphenols and more.

Although the first sip can be a challenge to the uninitiated, many find the body craves more due to its nutrient rich profile. Most brands are sold raw to ensure the live culture and organic acids remain in their natural

state, however a few brands are pasteurized and typically add probiotics.

Everyone from celebs and athletes to moms and millennials are drinking Kombucha. Once relegated to Whole Foods, consumer demand has driven phenomenal growth rates in the natural channel (20 to 30 percent per year) that have flooded into traditional grocery and convenience stores at even higher rates (30 to 60 percent), prompting most major chains to launch their own private label brands.

Globally, the Kombucha market is estimated at over \$1.2 billion with projections reaching \$5.25 billion by 2025. While that may be a drop in the proverbial soda can, slipping sales has "Big Soda" seeking answers. Currently, Pepsi owns KeVita while Coke owns Mojo, an Australian brand, and a variety of investments from Peet's Coffee to Molson-Coors have staked their claim in the Kombucha space.

By Hannah Crum and Alex LaGory

Expect more large beverage makers to acquire Kombucha brands in the coming years.

The next trends within the category include hard Kombucha, where producers add higher alcohol yeasts to create beverages with three to eight percent ABV, as well as CBD infused Kombucha. Many producers are also switching from bottles to cans. Lighter packaging translates to lower transportation costs and convenience for consumers to bring to beaches, camping, hiking and other venues that prohibit glass.

Hannah Crum and Alex LaGory created KombuchaKamp.com in 2004 with a mission to "change the world, one gut at a time" by providing quality information, quality cultures and quality support for home ferments. They have also authored the award winning, Amazon Best Seller, The Big Book of Kombucha, and founded Kombucha Brewers International trade association, to unite and advocate for the commercial Kombucha bottling industry worldwide. A popular speaker about Kombucha, fermentation, and bacteriosapiens, Hannah, aka "The Kombucha Mamma," is frequently featured at corporate & health conferences, festivals and events





GET SOCIAL, CREATE AN EXPERIENCE AND BE AUTHENTIC WITH TEA



By Tania Stacey

It's 2019 and speciality tea is still yet to find an accepted industry definition. How does a start-up tea business work towards defining its product offering?

The tea industry has sat comfortably for decades as the perfect "everybody loves" gift and "just like a box of chocolates you never know what you're gonna get!" More recently, offerings of "unique blends" or "direct trade or sourced" have been added to the selection of prized perfectly packaged gifts. Can this market position be viable for start-up tea companies?

So how do you take on the current state of tea – tea's next wave...or T2? Some tea businesses do a great job in succeeding by playing up a tea lifestyle by utilizing social media. Social media plays an important role in the modern consumer. There are enough studies and research to show that consumers prefer to support local, and friend/family referrals are stronger than glossy "picture perfect" because of social media.

Social media is an insight to what a consumer wants to experience. The gift of tea remains, but tea businesses need to package the tea as a social media experience to achieve the glowing testimonials necessary to build a strong brand following. What opportunities does this open to us? Tea practitioners have known for decades that tea and food go well together, but now there is a real opportunity to create the experience for social media consumers to consume it.

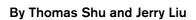
Photos are a great piece of evidence to share on socials, to prove to your customer that you are doing the work and learning your craft for them. Can you be everything to everyone? No, you can't, because no one knows everything about tea. Drill down, become a specialist in your tea area, and you will present an authentic experience that consumers are looking for. They're looking for the authentic, they're looking for the experience, and they're looking to align with businesses that care for them, the product/ service and the source.

Tania Stacey is an Australian tea practitioner. She began her education in Taiwan, which inspired her interest in the flavors and aromas created with tea plants, as well as tea processes throughout regions of the world. Believing that tea can be seamlessly integrated into the hospitality world, you will find Stacey promoting the value of the modern tea beverage on YouTube at Cuppa Cha TEA Channel.

"SO HOW DO YOU TAKE ON THE CURRENT STATE OF TEA - TEA'S NEXT WAVE...OR T2?"



OOLONG IN THE NEW TEA WAVE 🚄



As tea educators, we strive to adapt our methods to help equip our audience and students to strategically affect the tea industry. Rather than creating extravagant fictional legends of some tea origins, we focus on information based on facts, research and hands-on practical experienced.

Some of our current objectives:

- New tea labeling with clear accurate tea identification/information. Consumers do inquire to gain relative tea knowledge on each tea product.
- Food safety, ecology and technology focused tea products should be applied to tea plantation management and tea manufacturing practices.
- As consumers become ever more health conscious, tea as an all-natural, no-alcohol, no sugar-added beverage will attract the wellness-focused lifestyle.

Present the basics: Offer tea details with full FACTs (Flavor, Aroma, Color, Taste) to clarify how these characteristics are expressed with each tea.

- Oolong Sense is our "common sense" approach to detail how craftsmanship of oxidation rate, rolling technique and baking program determines the tea FACTs.
- Oolong to rise among all teas for the New Wave...Since Oolong is still relatively unknown to the general consumer market, the spectrum of Oolong can encapsulate the essence of non- and fully-oxidized teas and beyond.
- Operating in an industry which serves farm to table, we design professional courses for each niche in the consumer market.
- Understanding oolong as a product is defined, yet the market to disseminate the product is still unchartered
- With the library of training materials from the Taiwan Tea Institute, our goal is to help train knowledgeable Oolong Sommeliers to make a splash for the new wave in tea.

Thomas Shu, co-founder of JT & Tea Inc., is a third-generation tea specialist from Taiwan, where his family has been conducting tea business for more than 75 years. He works with many major tea companies and premium tea importers from Asia, Australia, Europe and the United States. With his proficient expertise and extensive knowledge in teas and the tea industry, Shu is a frequent speaker at World Tea Expo, as well as other international conventions and educational institutes. He is one of the founding members and serves on the board of the American Premium Tea Institute, which has now merged with and known as the Specialty Tea Institute. He also conducts Taiwan Oolongs Study Tours, known as TOST. See TaiwanTeaTour.blogspot.com.

Jerry C. Liu, Ph.D., comes from a lineage of ancestors working in the tea industry in Northern Taiwan. He is an educator with a background in behavior ecology and sensory perception. He collaborates with the Taiwan Tea Industry to develop courses, workshops, and materials on tea education for the Taiwan Tea Institute. Dr. Liu is currently a faculty member at Mount Saint Mary's University and Cal State Northridge, where he teaches applied physiology and microbiology. he has also taught courses in behavioral ecology, neurobiology of behavior and environmental science. His work has appeared on BBC, Discovery Channel and PBS.





A LOOK AT INDIAN FINE TEAS



By Shalini Agarwal

The majority of tea produced in India

is CTC and is primarily consumed domestically. At India's Independence from the British in 1947, only 20 percent of production was consumed in India and the rest was exported mostly to Britain. Tea production has increased more than five-fold since 1947, and 90 percent of this is CTC. Orthodox teas comprise only seven to eight percent and the rest is green and other specialty teas. Major importers of India tea are CIS (former USSR), Middle East, The U.K., Germany, Pakistan and the United States.

Tea farms in India are still mostly large-scale commercial units as opposed to small growers in countries like China and Taiwan. This model is in transition as tea labor is becoming in short supply with the youth finding other occupations. Because of labor shortage, machine harvesting is now used extensively in South India and moving to other areas as well. Also, more than 50 percent of tea is now grown by small farmers and leaf is taken to 'bought leaf' large factories.

Demand for specialty teas is growing in the international market, and Indian growers are moving beyond the traditional types of tea produced. Larger producers are well positioned to lead the way due to their regulated production, skilled labor and ability for experimentation, and have begun producing fine teas in all categories such as Oolongs, Silver Needles, Green teas that are competing with the best from China, Taiwan and Japan.

Innovative micro factories with production capacity of 500 kgs and less per day are being constructed. Small producers are able to make fine quality teas, and the Tea Board of India is subsidizing as well as providing technical and marketing support to these entrepreneurs. Small farmers can now make high quality specialty teas and compete with the best in the world market in quality and price.

As demand for quality teas is increasing, we will see more specialty high grade Indian teas being manufactured and exported. Consumers in United States are now quality conscious, and the trend for tea will be as it has been for wine and coffee in the last decade.

Born to the 'Chaiwala' family of Dehra Dun, Shalini Agarwal grew up in tea farms of Assam and Darjeeling. The family has been in tea since the 1930s, and the fourth generation is now managing the farms that her grandfather acquired from the British. Agarwal has been promoting teas from the family gardens, Khongea in Assam and Glenburn in Darjeeling, in North America for the last seven years under the brand name Glenburn Tea Direct. She has a bachelor's degree in economics from Delhi University and is based in Southern California. See GlenburnFineTea.com.

"AS DEMAND FOR QUALITY TEAS IS INCREASING, WE WILL SEE MORE SPECIALTY HIGH GRADE INDIAN TEAS BEING MANUFACTURED AND EXPORTED."





- GOING HYBRID THE FUTURE OF GROWING TEAIN ASSAM

By Avantika Jalan

Tea has been cultivated in Assam since the 1820s. The thick tropical forests of Assam were a blessing and an impediment for the early tea planters. While several hectares of forest land had to be cleared to establish a tea estates, the tea flourished in the rich, clayey virgin soils.

As the industry grew, more of the forest land was converted to tea. In the 1960s, the introduction of synthetic fertilisers (urea) increased yields dramatically. For 30 years, production boomed. The traditional practices of using organic manures, and having a balanced flora and fauna that naturally kept the pests in check, was greatly augmented by the use of chemical inputs. However, over time, growers became over reliant on these chemicals, and slowly discontinued traditional practices, and the balance of carbon and micro-nutrients available the soil was disrupted.

With production becoming heavily dependent on chemical inputs, disease and pests also increased. Tea planters started using ever-evolving chemical pesticides to fight this problem. While these chemicals effectively controlled the pest problems at first, their effectiveness decreased over time, as pests built resistance.

Today, the industry is forced to learn from its mistakes. While the virgin soils and forested lands are long gone, the practice of adding compost to increase carbon in the soil, herbs for pest control, and encouraging local biodiversity to rehabilitate the environment, is returning. Select estates have converted to organic. However, working strictly in the organic system for a monocrop is a challenge.

Given these realities, the tea agriculturalists are recommending a shift in the field practices for growing tea. Going hybrid, i.e. using the best practices of both, chemical and organic/traditional agriculture, to grow tea in Assam is emerging as the new way forward.



Avantika Jalan is director of the Chota Tingrai Tea Estate. Avantika is a 4th generation tea planter, who has been working in the field of sustainable agriculture for the past eight years. She leads the field operations at her family owned estates in Upper Assam and has introduced large scale organic tea management. Avantika also runs her U.S. based tea company to bring direct, sustainable, organic teas to buyers in North America. She holds a master's degree in development practice from U.C. Berkeley. Visit JalanIndustries.com.



NEPALESE TEA DISCOVER THE HIDDEN GEN OF THE HIMALAYAS



By Jeni Dodd

Hidden in the Himalayas, a rare gem awaits your discovery. Though a relative newcomer to the specialty tea scene, Nepalese tea has developed a devoted and passionate following amongst tea enthusiasts and aficionados.

These devotees have discovered what you soon will. Nepal is blessed with a unique terroir that translates into vibrancy in a cup. The average age of the tea bushes in Nepal is only 30 years old. These bushes are nourished and irrigated from the sparkling pristine run-off waters of the Himalayan peaks (eight of the 10 highest peaks in the world are in Nepal). As a landlocked country that has never been industrialized, the air is free from pollutants. And, the soil...a gift from the gods! Centuries of forest leaves created a nutrient-rich top soil, the perfect environment for a tea bush to thrive

However, the brightest sparkle of the rare Nepali tea terroir...the remarkable Nepalese people themselves. Fiercely independent and proud of their heritage, every cup reflects their character as a revelation of the unique flavor passionately made with pride. If you have ever had the great fortune to meet a Nepalese person, you know first-hand the warmth and hospitality they show you. Experiencing Nepalese tea is like meeting a Nepali. Each cup is immediately welcoming, easily accessible, warm and inviting.

Yet, in each sip remains a bit of mystery, a bit of the mystical, a bit unknown...the intrigue compels you to want to know more, experience more, taste more tea and discover the hidden gem of the Himalayas.

Enjoy discovering the rare and unique teas of Nepal.

"EACH CUP IS IMMEDIATELY WELCOMING, EASILY ACCESSIBLE, WARM AND INVITING." Born and raised in America's heartland, Jeni Dodd has journeyed far from the plains of Kansas to remote tea-growing regions throughout the world in search of the perfect cup of tea. The owner of Jeni Dodd Tea, a company dedicated to importing handcrafted, unique specialty teas and offering tea education for groups and events, Dodd seeks to expand the public's awareness of the specialty tea market and lead consumers to discover the exquisite joy of the leaf. She is a Certified Tea Specialist through the Specialty Tea Institute and has completed all of STI's Level IV courses offered to date. Dodd has taught future tea entrepreneurs and enthusiasts at the Specialty Tea Institute. She has presented several times at World Tea Expo, as well as regional tea festivals throughout the United States. She was a guest speaker at Nepal's International Tea Day and Nepal's 3rd International Tea Festival. She currently trains Nepalese farmers and producers on the successful marketable quality and flavor profiles empowering competition in the global market.







to All of the Contributors of This Insightful White Paper – All of Whom Are Presenters at World Tea Expo, June 10–13, 2019, in Las Vegas.

To Register or Learn More About World Tea Expo, Visit: WorldTeaExpo.com

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