

Oatly Intelligence World Wide

PRESENTS:

# A REPORT ON THE FUTURE OF TASTE

PREDICTING WHAT'S NEXT IN BEVERAGE CULTURE.  
FLAVOURS, NUMBERS, TRENDS (AND GUESSES).



Editors' letter (by Toby Weedon, Ro Roos, and Jed Hallam)

The best thing about predicting the future is that no one remembers what you got wrong; they only remember what you got right. Unless it's written down and shared with the public. Ah, oops.

In most areas of popular culture, predicting trends is a tricky business. They move fast, sometimes sideways and regularly confound logic (we're talking about you, Labubu's). Nowhere is this more true than in food and beverage culture.

At Oatly, we have two powerful sources of information to lean on: our network of world-renowned baristas and our partners at CultureLab, a cultural intelligence platform built to objectively quantify popular culture. Bringing these two together, and combining them with the power of qualitative insights from over 200 expert interviews with quantitative rigour, gives us a more accurate way of looking at how future trends may evolve.



What we've found is that people's daily drink choices, especially younger generations, are being shaped by a world in flux. Drink trends go viral and are seen from London to Seoul, and technology is making it easier to order, customize and share. Tighter budgets mean value matters, but a unique drink is still worth the splurge. Health, sustainability trends and global flavours are blending as a generation raised online is seeking both identity and connection in every cup. What's popular today provides an insight into a constantly evolving, global, digital culture.

In this report, we set out to capture the next wave of trends we expect to see gracing the menus of high street shops and your favourite coffee spots in the coming months. From fibremaxxing and the dawn of decaf to the fusion of East and West and the explosive rise of Southeast Asian flavours. Plus, of course, some bets on what's next for matcha.



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# THE GLOBAL FLAVOUR EXCHANGE

THE NEXT WAVE OF FLAVOUR BLENDS HERITAGE THINKING WITH BOLD IDEAS, WITH EAST AND SOUTHEAST ASIAN TRENDS SETTING THE PACE.

Matchamania has opened the floodgates for a broader shift in global tastes, especially in the West. We’re already seeing a myriad of specialist East and Southeast Asian ingredients appearing on menus worldwide. From calamansi to ube, pandan to osmanthus, the list of fruits, vegetables and herbs discussed in joyful tones by the baristas of Europe and North America is long and bursting with colour.

Take ube, a sweet purple yam native to the Philippines whose popularity is gathering pace around the world, from lattes in LA to ice cream in Iceland. Pandan, a fragrant green plant, is also starting to make loud noises on London’s food and drink circuit, as one cafe owner discovered: “When we first opened, we had to spend, like, a whole year trying to explain what pandan is. And now when I go into some random cafes, I see pandan this, pandan that!”

Aromatic yuzu emerged throughout the research as a key driver of a possible citrus renaissance, used particularly in homemade syrups, with calamansi also mentioned in Australia.



“I see taro or ube coming up or calamansi and yuzu. So, I feel like there’s some movement of East Asian and Southeast Asian produce into the mainstream.”

## LA

Nostalgia plays a role in this trend, too. Black sesame has enjoyed a comeback in Korea through the ‘halmaenial’ trend, where young people embrace the traditional food and pastimes of their grandparents’ generation. Now, it’s rapidly making its way around the world, as one Parisian barista explained: “We’d never seen black sesame on the market other than in Asian food. Nowadays, we put it everywhere. In food, in drinks. We do the black sesame latte, we do the black sesame cheesecake. People really like it.” New Yorkers are putting it in ice cream and in Belgium, we heard from a chocolatier whose signature drink sprinkled with gomashio, a Japanese sesame-based seasoning, has become an unexpected best seller. Kinako, also from Japan and with a similar nutty flavour, got high praise in Paris.

It’s not all one-way traffic in Tastetown, though. We found evidence of flavours skipping around the map in all directions, usually passed on through migrant communities or intrepid travellers. We heard New Yorkers singing the praises of Nordic cardamom buns, Singaporeans crazy for pizza and Koreans obsessed with Italian espresso bar culture.

As if to prove how non-linear culture can be, interviewees from East Asia credited the matcha craze to the US and Europe, as one Japanese barista explained: “Of course, we like matcha, but when I visit the Netherlands, for example, they’re serving matcha everywhere. We’d order matcha when we go to Starbucks, but most specialty coffee shops [in Japan] are not serving matcha”.

“Currently in Amsterdam, it’s a lot of sourdough pastry, a lot of fermented things and a lot more influence from Japan and Southeast Asia.”

## AMSTERDAM

We heard a similar sentiment in Korea: “While matcha has long been enjoyed across Asia, its popularity surged rapidly on social media when celebrities in the US began posting about it.” Another added: “Koreans traditionally don’t really like matcha. It wasn’t something people cared much about. But once it started spreading culturally, people began wanting to learn about that taste, like, ‘Oh, I had matcha when I was in LA, and now it’s available in Korea, so I should try it.”

The once-linear notion of trends no longer holds up. Trends go on a gap year, come back looking and sounding slightly different, then, all of a sudden, find themselves popular again back home.

The future of flavour will be a fast-moving ecosystem as the global cultural hegemony shifts to the East through social media, streaming platforms and increased travel. Expect more flavours, rituals and traditions from across Asia to travel around the world and back again.

### KEY STATISTICS

- Pageviews related to hojicha have almost doubled in the US so far in 2025 (98.9% increase) compared to the same period in 2024 [CultureLab Navigate data, 2024-25]
- Global searches for ube, pandan and hojicha have doubled since Jan 2022 [Google Trends]

# CONSCIOUS INDULGENCE

CONSUMER DEMAND FOR HEALTH-CONSCIOUS OPTIONS WILL PUSH FLAVOUR TO NEW PLACES. WELCOME TO THE DAWN OF DECAF.

Health-conscious categories like decaf, natural sugar and alcohol-free are shifting as they embrace flavour in the face of surging customer demand.

Let’s start with caffeine. Baristas we spoke to around the world had recently noticed a sharp rise in the number of customers asking for decaf coffee. As one respondent in Arizona said: “We’re seeing a lot of people veer away from caffeine, or from coffee, for health reasons.” Another in Melbourne commented: “I’ve met a lot of people, this year in particular, who have stopped drinking coffee to try and improve their sleep”. Another went even further, fully nailing their flag to the decaf mast: “People are becoming more aware of their caffeine intake. Decaf is going to be the next frontier in coffee.”

“A lot of decaf is being sold. Way more than ever before. A lot of people are taking care of their caffeine intake”

BERLIN

As we’ve discussed elsewhere, a number of interviewees put matcha’s surging popularity down to customers wanting a healthier alternative to coffee, calling out its benefits for a slower-release caffeine kick. It’s also opening the door to a new kid in town. “Hojicha is being seen as a new and emerging product, like a low caffeine option within a café setting”, said one barista in Australia. Pageviews related to hojicha have almost doubled in the US so far in 2025 compared to the same period in 2024 [CultureLab Navigate impressions data, 2024-25].

This is an interesting space for flavour. Maybe it’s because they’re not hacking our brains with dopamine, but there’s still a lingering feeling that health-conscious options just don’t taste as good. And maybe that assumption isn’t always wrong. For now. But what we’re hearing from our baristas is a clear need for health-conscious products that don’t sacrifice flavour. If coffee doesn’t up its decaf game, hojicha or some other mildly caffeinated beverage is poised to step in.

One option is, and has always been, simply making stuff sweeter. One New Yorker threw up their hands and declared: “The future of flavour is simple syrups!” (OK, they didn’t actually throw their hands in the air, but they did say that). But not everyone agrees. Many other baristas we spoke to are moving away from overt sweetness, experimenting instead with yuzu, monk fruit or chamomile, to great effect. Across the board, customers have been asking for less sugar and more natural ingredients, opting to get any kind of sweetness fix from nature instead.



“Health here isn’t just about physical well-being. If a drink feels healing or comforting when you have it, that counts as health, too. It’s not only about ingredients being physically good for your body but also about the mental side of things. For example, if you had a certain drink when you were in New York and it brings back that memory, seeing it again makes you feel good, even if it’s not technically a wellness drink. It becomes healing through nostalgia. That, I think, is a major trend right now.”

SEOUL

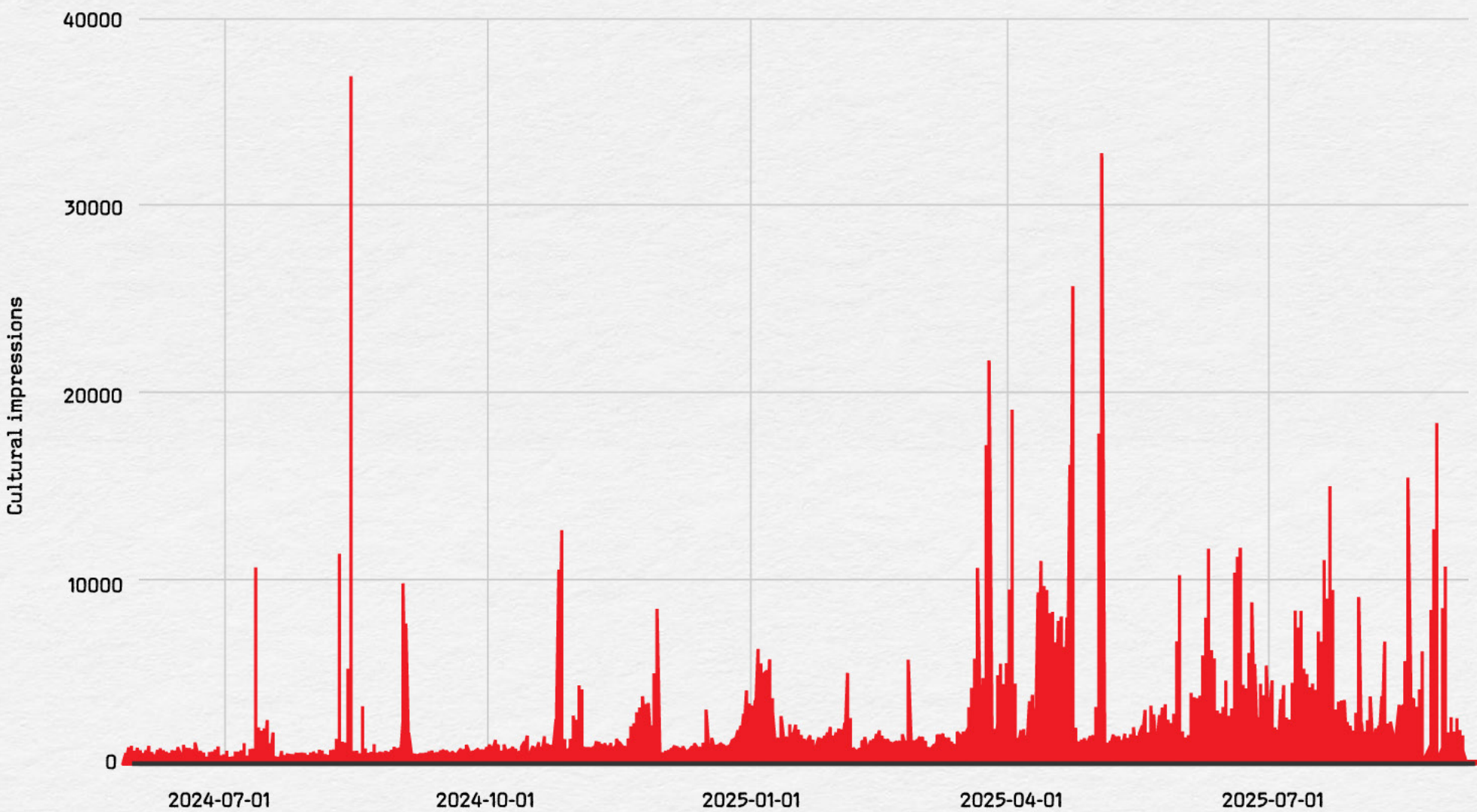
This new wave of conscious indulgence isn’t always about logic or ingredients; it’s about how a drink makes you feel. More and more, people are drawn to flavours that evoke comfort and nostalgia, transporting them back to childhood or simpler times, whether through a familiar taste or soothing blend, like chamomile. The rise of ‘healing’ drinks is as much about emotional escape as it is wellness.

The next wave of drinks is all about balance. The popularity of decaf and low sugar is ready to surge in 2026, creating bold, health-conscious flavours that don’t rely on sugar for that fresh new experience.

## KEY STATISTICS

- Daily impressions for decaf have grown 90x in 2025 [CultureLab Navigate data 2024-2025]
- Searches for healthier alternatives like decaf, low sugar and alcohol-free have increased 360% over the last two decades [Google Trends]

GROWTH OF HEALTHIER FOOD AND BEVERAGE ALTERNATIVE INTEREST



CultureLab Navigate data (visualised in the chart above) shows there’s increasing velocity, frequency and volume of interest in products that are low/no sugar, or low/no caffeine, or use natural flavourings. This increase is bucking the trend of traditional seasonal interest we’d expect to see in health-focused products.

# FIBRE HAS ENTERED THE CHAT

THIS OVERSHADOWED NUTRIENT IS COMING FOR PROTEIN'S CROWN.

Fibre was, until very recently, lacking any kind of main character energy. Bland, functional and associated with bowel movements, it's hardly the stuff of social media virality, especially when compared to protein's star power. But thanks to the gut health boom, we're seeing fibre experiencing a glow-up. And it's now the nutrient everyone's talking about.

After first emerging on TikTok in Autumn 2024, fibremaxxing (or fibERmaxxing) suddenly spiked this summer, sending the world's media into a chia-induced frenzy. Pageviews for articles mentioning the term jumped 9500% between June to July [CultureLab Navigate data 2025].

These things don't just happen by magic. Fibre's reappraisal had been bubbling under the surface for the past year, thanks to the surging popularity of prebiotic sodas. Not to be confused with PRObiotics, PREbiotics are a type of gut-healthy fibre found in plant-based foods like whole grains, fruits and vegetables.

“Gut health is a growing area of interest. Many consumers are looking for probiotics, fermented foods and choosing fruits that are in season.”

GDANSK



With their intensely Gen Z branding and celebrity collabs, prebiotic soda brands like Olipop and Poppi successfully introduced fibre into the Hot Girl lexicon by giving it a pastel makeover and citrus flavouring. The wellness-adjacent drinks, sold as a gut-friendly alternative to more sugary sodas, rocketed in popularity, leading to PepsiCo acquiring Poppi for \$2bn in March 2025.

Far from being another TikTok diet fad, we believe there's a significant, longer-term change happening here. Big macro-level shifts tend to be reactive. If the '20s have so far belonged to protein, itself a reaction to the vegan-mania of the '10s, we'd expect to see a digestion-conscious movement coming down the line in response. Cue Fibre's walk on music.

“Everyone's into the wellness life right now. So, they're all trying to find a drink or food that's good for your gut, like prebiotics, and good for your skin.”

LONDON

What does this mean for flavour? Get ready to taste even more fermented offerings as gut health continues its surge into mainstream culture. According to our baristas, drinks like Tepache, a centuries-old Mexican favourite made with fermented pineapple, are poised to make their way around the world. We've already seen a 25% increase in pageviews related to the drink in the UK so far this year [CultureLab Navigate impressions data, 2024-2025]. Expect to see an emphasis on fibre-rich organic, seasonal fruits and veg. Beets and corn were both mentioned by our baristas as key ingredients emerging in various regions.

“Fermented beverages are getting more popular. People are getting more used to the fermented flavour.”

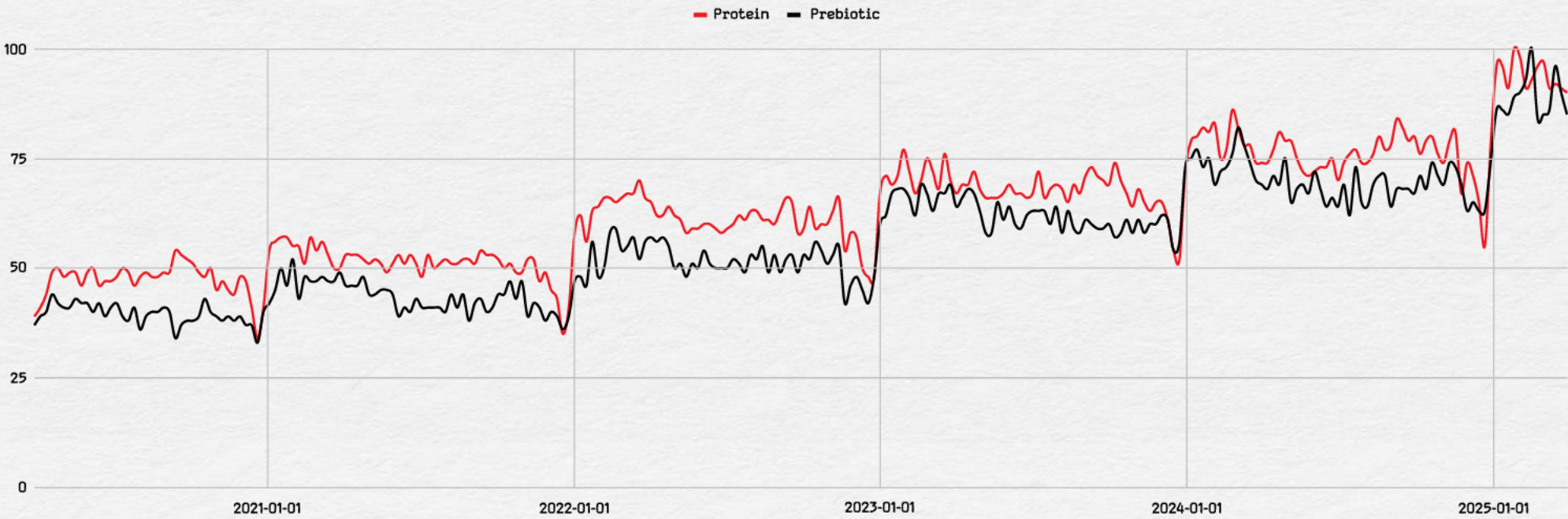
LEUVEN

And, as anyone who's ever spilt a jar of them will tell you, chia seeds get absolutely everywhere, very quickly. Their presence on social media during the fibre wave is no exception. This summer, plant-based YouTuber Sauce Stache ATE CHIA SEEDS EVERY DAY FOR A MONTH to the tune of 140k views, his fastest rising video this year, while the 'internal shower' chia-based mocktail saw a resurgence on TikTok. We'll be seeing a lot more chia in 2026, and not just for breakfast.

## KEY STATISTICS

- 41% of respondents mentioned terms related to gut health when asked about current and future customer trends
- The global prebiotics market is set to grow from \$6.95 billion in 2023 to \$13.26 billion by 2029 [Arizton]

Our CultureLab Navigate data (displayed in the chart below) shows that the growth in interest in prebiotics has been building over the past few years. It follows the same growth pattern and trajectory as protein did over a similar five-year window, and we know where the protein trend took us...protein in everything! Considering prebiotics are just one subgroup within the fibre umbrella, this would suggest a breakout trend is on the cards.



# DESTINATION DRINKS

THE PROVENANCE OF UNIQUE LOCAL INGREDIENTS WILL BECOME CULTURAL CURRENCY FOR A GENERATION HOOKED ON NOVELTY.

As globalisation creates a landscape where the same menus appear in every city, signature drinks - creative concoctions invented and sold exclusively by a particular cafe - are booming in popularity. We heard reports from Australia: “Signature beverages have grown astronomically in Melbourne in a really short period of time. Within the last six to 12 months, they’ve exploded.” As well as from LA: “I was just working in a cafe this morning and seriously, every single person ordered a signature drink. I was like, whoa, okay!”

Some put this down to price-conscious customers seeing higher value in unique products, as one barista explained: “A lot of people have espresso machines at home, so I feel like more and more customers are going out for something that they can’t make themselves, which is these very creative, aesthetic Instagram-y kind of drinks.”

“Taking little notes from mocktails and regular bar drinks and bringing it into the coffee scene has been awesome”

LA

In response, baristas are seizing the opportunity to create unique recipes with quality specialist ingredients, including drawing from local biodiversity in a response to climate change and an effort to revive regional traditions. From lemon myrtle and pepperberries in Australia to Finnish forest berries, interviewees were committing in their droves to sourcing local, as one put it: “There’s all of these incredible, unique products in Australia that I wish people knew about. If we’re leaning more into these signature beverages, we should also lean into native ingredients.”

In the future, we expect the provenance of local ingredients like this to become a new kind of social clout, feeding Gen Z’s need for travel as cultural currency and driving regional pride. British bakery Gail’s recently introduced a decidedly English-sounding cucumber and elderflower matcha to their 170+ outlets. Could we also see a perilla and Campari espresso tonic exclusive to Seoul’s new breed of Italian restaurants? Or a Greek frappe by way of New York, appearing on menus in Athens in an Aegina pistachio form?

“Right now, we’re seeing a return to the roots. Traditional Polish flavours are making a comeback with a modern twist. Things like rye-based pastries or fermented almonds.”

WARSAW

Conversely, we’re sensing a ripple of frustration with all this liquid ornamentation from some coffee loyalists, as one New Yorker put it: “Signature drinks in specialty coffee? They gotta tone it down a bit. It’s getting too much, you know. We’re forgetting about the actual coffee”. A Glaswegian lamented: “I wish people knew how delicious espresso can be”. Could this emerging split signal a future culture war between clout-chasing maximalists and filter-loving minimalists?

“We’re doing more of a focus on local produce, like homemade beetroot chai.”

VIENNA

Maximalist or minimalist preferences aside, the future of flavour hinges on two things: quality and distinctiveness. Consumers are increasingly value-conscious, and that includes a craving for transparency. Yet, it’s not just about the ingredients; it’s about how, and where, they’re used. Locality is becoming a signature flavour, as one barista in Seoul said: “We highlight drinks that are only sold at certain locations, made with local agricultural products or specialities. To try them, you must visit that store, and when you do, you get to enjoy that unique experience.” We heard the same in London: “Flat whites are ten a penny, but a beetroot chai is only suited to that city, that type of consumer and that cafe.” Across the board, provenance and distinctiveness are setting the best apart.



## KEY STATISTICS

- 85% of baristas agree that customer tastes are becoming more adventurous [CultureLab Navigate Data 2025]

# THE FUTURE STATE OF MATCHA

THE GREEN STUFF HAS EXPLODED IN POPULARITY THIS YEAR, FROM HIGH-END TO HIGH STREET, BUT DOES IT HAVE STAYING POWER?

You can't walk down the street these days without knocking into somebody taking a picture of their matcha latte. The global rise of the vibrant, Japanese tea-based beverage over the last 12 months has been phenomenal, and, as we're looking into the future here, we quizzed our network on matcha's fate. Will it become another passing fad, or is it here for the long run?

In short, the jury's still out on whether we've reached the summit of Mount Matcha. But there were lots of interesting opinions on how we got to wherever it is we are.

“Matcha is definitely the biggest trend in Korea this year, and I believe it has been heavily influenced by the U.S.”

SEOUL



For one, health seemed to be a big driver. Baristas around the world reported that in the midst of the wider wellness boom, customers have been drawn to matcha's perceived health benefits. 'Antioxidants' was a word that came up in conversations repeatedly, with consumers being drawn to the siren song of matcha's more gentle caffeine boost, compared with the anxiety-baiting intensity of espresso-based drinks. One barista described matcha's buzz as “holding longer and slower throughout the day”. Even the colour makes a difference. “People associate green with being healthy”, commented another.



“I think it's still peaking. It's more flexible, so you can make more drinks with it.”

VIENNA

But can supply keep up with demand? According to our network, there just isn't enough matcha to go around, and suppliers are struggling to keep up. “Matcha has exploded in popularity. No surprise, I love it! But with big growth, supply can become a challenge. So, it's very important for companies to be really diligent in ensuring the ingredient is sustainably grown and produced”, said Caroline Reid, Oatly's Director of Sustainability. With price, provenance and quality of very high importance to customers right now, a wave of expensive bottom-shelf matcha could well have a damaging effect on popularity.

Meanwhile, we're already seeing eager baristas lining up matcha's replacement. From Berlin to Melbourne, hojicha was one drink our interviewees wished the public knew more about. Its versatility is comparable to matcha and it's mildly caffeinated. The problem? Hojicha looks like...drum roll please...coffee. And the vast majority of experts mentioned the importance of unique aesthetics as fundamental to a new trend taking off.

“I'd say matcha is neck-and-neck with coffee on our menu.”

MELBOURNE

Vibrant purple ube is another Asian ingredient on the rise online, with impressions rising 310% in the US through 2024 [CultureLab Navigate impressions data 2024]. But, so far, reviews from our experts have been mixed. One experimental barista said: “I made some ube drinks and stained everything possible in my house. It's really hard to remove”. Another remarked: “It's not really tasty. It's not fantastic. It's just violet and looks cool in pictures.” They added: “There's going to be another matcha, but it's not going to be ube.”

“100% it will stay, and we are not at the peak.”

PARIS

Enter stage left: tea. With aesthetics, versatility and cultural depth on its side, it's already making quiet moves. We saw Earl Grey having a moment earlier this year, surfacing in cocktails and drinks in the US. Oolong and jasmine varieties from China are also exploding in popularity while specialised milk tea shops are popping up across Shanghai. Maybe tea is a trend brewing entirely on its own terms...

In the meantime, has the matcha fever broken? Looking at the data, search interest fell 28% since its peak in August 2025. It looks likely the craze of matcha-flavoured everything will come to an end in 2026. Although its strong association with the Hot Girl aesthetic and links to wellness are still giving it staying power in the mainstream. Don't expect matcha references in Vogue to end anytime soon. As one barista in Istanbul said: “It's healthy, versatile and helps coffees reach a broader, wellness-focused audience.”

“For a lot of people, it's kind of a health and lifestyle choice to switch from coffee to matcha.”

BERLIN