Euromonitor International

The Intoxicating Appeal of Sobriety: Adult Non-Alcoholic Drinks go Mainstream

May 2025

EXECUTIVE SUMMARY

Why read this report?
Key findings

INTRODUCTION

Intoxicating dynamics and non-alcoholic adult beverages: A snapshot

NON-ALCOHOLIC ADULT BEVERAGES: MINDFUL MOMENTUM

Not just a fad: Non-alcoholic adult beverages reach escape velocity
Mindfully staying at home: Off-trade dominates across the board
A snapshot of key brands by non-alcoholic category: From legacy to iconic pioneers
Telling a story and charting a path: The Pathfinder
Beyond dealcoholisation: Experimenting with proxies
Curiously experimental: “It’s not a beer, it’s a boost”
Kin Euphorics: From moderation to “braincare”

DEMOGRAPHICS, OPTIONALITY AND DECELERATED OCCASIONS

Optionality not teetotalism: Cutting down cuts across demographics
Why non-alcoholic? Health, religion and identifying key drivers
#DrinkTok, zebra striping and the social media effect
Moderation without compromise: Decelerated occasions and hybrid formats

PRODUCTION, FUNCTIONALITY AND PRICING

From evaporation to osmosis: The production methods behind the trend
Functionality through the prism of a need states framework
Can range and price hold the category back?

“CALIFORNIA SOBER” AND CALIFORNIA DREAMING: THE CANNABIS FACTOR

California sober and “damp” instead of dry: There is a world between sober and drunk

‘CALIFORNIA SOBER” AND CALIFORNIA DREAMING: THE CANNABIS FACTOR

Deconstructing the cannabis beverages trend
Cannabis beverages: Mindful indulgence?
In alcohol’s footsteps: Cannabis as an alcohol alternative

HEALTH GUIDELINES AND THE OZEMPIC EFFECT

A tobacco moment?
Weight loss drugs and alcoholic drinks: Storm in a beer glass or the great disruptor?

CONCLUSION

Recommendations/opportunities for growth
Non-alcoholic adult beverages: Embracing the paradigm shift
An intoxicatingly sober future?
Questions we are asking

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- Strategy Briefings: Global or regional in scope, and focussing on the most important themes shaping consumer demand, the

key markets, competitive environment and future outlook across a range of industries.

- Company Profiles: Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- Country Reports: For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/the-intoxicating-appeal-of-sobriety-adult-non-alcoholic-drinks-go-mainstream/report.