



**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

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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.