Euromonitor International

Emerging Substances and the Rise of Transgressive Wellness

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EXECUTIVE SUMMARY

Why read this report?
Key findings

INTRODUCTION

Large potential audience and revenue pool for transgressive wellness
Drivers of transgressive wellness and emerging substance adventurism
Macro chaos, wellness disillusionment and personal rebellion collide
Scientific legitimisation drives regulatory liberalisation
Global communities and influencers reframe emerging and taboo substances
Value of psychedelic consumption alone could reach USD40 billion by 2035

EMERGING SUBSTANCES LANDSCAPE

A taxonomy of emerging substances
Emerging substances overview
What's in a dozen names?
Neuroplastogens: Healing without highs?
Santa: "Noise cancellation for your mind" expands transgressive wellness palate

CONSUMER PROFILES AND FMCG IMPACT

Expanding uptake of emerging and taboo substances
The diversity of transgressive wellness consumer types illustrates potential
Assisted psychotherapy central to several consumer missions
Optimisation and performance improvement gaining traction
Cross pollination of taboos as transgressive wellness interacts with intimacy
Emerging domestic user missions in pet care, home and garden
Psychedelic exploration goes physical
Transgressive wellness's "GLP-1 like" potential
Category by category impact of transgressive wellness
Threat builds to an alcohol industry at a pivot point
Existing pharma offerings in peril but opportunities for vitamins and dietary supplements
Transgressive wellness both rehabilitates and competes with nicotine and cannabis

REGULATING TRANSGRESSIVE WELLNESS

Current global regulatory status
Key regulatory trends in transgressive wellness
Regulatory progress is not linear: US regulators reject MDMA to treat PTSD
MAPA: Make America Psychedelic Again?
Transgressive wellness in the context of other destigmatising taboos
Emerging harm reduction
Lucy: AI presents regulatory challenge and opportunity for transgressive wellness

INNOVATION IN TRANSGRESSIVE WELLNESS

A sector seeking a step towards the mainstream
Transgressive wellness offers a spectrum of plant-touching innovation areas
Microdose Pro: EU-legal psilocybin truffle microdose platform
Psilly Goose and Psychedelic Water: Flirting with transgression
Brainwash and END: Functional adjacencies hold the most immediate promise
Non-"plant touching" innovation opportunities
Wakeful Travel: Elegant and taboo-busting guided integration journals
Mindcure: Niche harbinger of a broader universe of opportunities
Nike and Jeffree Star: The promise and perils of alignment

CONCLUSION

Recommendations and opportunities for growth
Transgressive wellness promises returns for brave brands
Evolution of transgressive wellness
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/emerging-substances-and-the-rise-of-transgressive-wellness/report.