



Euromonitor
International

Emerging Substances and the Rise of Transgressive Wellness

February 2026

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.