



From Fizzy to Fulfilled: Today's Non-Alcoholic Beverages Need to Do More Than Refresh

The Trends Shaping What, When and Why the World is Drinking

At its core, the global beverage category is still driven by two timeless desires: refreshment and great taste with a focus on sweetness. Beneath that foundation, consumers are quietly, but enthusiastically, redrawing the category around new expectations, demonstrating unmet opportunities. ADM has identified **eight occasion-based consumer segments** for non-alcoholic beverages across **nine global markets**: Germany, UK, USA, South Africa, Nigeria, Saudi Arabia, Brazil, Australia and Vietnam.

These segments reflect specific occasion-driven needs rather than fixed consumer types – meaning one person may move across several segments depending on the sought-after benefit in the moment. While consumers in every country fall within each segment, the markets listed below indicate where they are most represented.



Fruity Refresh

For consumers looking to rehydrate with beverages made from ingredients that have a more “natural” appeal.



Fizzy Quench

For those seeking to quench their thirst with familiar flavors they love.



Craving Calm

For consumers wanting to unwind, feel comforted and satisfy a craving.



Chill & Joy

For people looking to cool down and savor the moment.



Indulging Experience

For those who want to treat themselves, reward a craving and enjoy a more satisfying consumption experience.



Sharp & Energized

For consumers desiring energy, focus, performance, recovery and immune support.



Celebration Elevated

For people looking to connect, celebrate and enhance shared meals and social occasions.



Hydrating Balance

For those striving to stay hydrated while maintaining the right balance of relaxation, energy and wellness.



Across markets, these occasion-led needs reveal a common truth: consumers seek beverages that support specific needs and lifestyles. We distilled these motivations into three emerging fresh and fizzy trends:

1

Drinks that deliver both feeling and function

2

Flavor complexity through layered sensory experiences

3

Pairing the right beverage with the right moment



TREND 1:

“Function with Feeling”*The Emotionalization of Functional Beverages*

Consumers are balancing familiarity with functionality. Cola and carbonated soft drinks (CSDs) are leading worldwide, while emerging market-specific opportunities abound to serve consumers’ lifestyle needs with hydration drinks, juiced drinks, energy drinks and malt-based drinks.

However, functional benefits no longer sell themselves. Consumers now consider how a drink makes them feel to be part of the value proposition. And what “feeling” means varies by region.

**Refreshment Motivation****Social and Lifestyle Expression****Health, Vitality, Physical Resilience****Consumer Segments Focused on Function and Feeling****Hydrating Balance – thirsty for multi-functional choices.**

This group provides a dual-function opportunity as they seek feelings of calm and alertness simultaneously. Enhanced waters and teas with electrolytes, vitamins and botanicals are promising avenues.

Celebration Elevated – looking for fancy fun.

These revelers are open to novelty and are dissatisfied with current options, providing a real playground for functional social drinks. Think sophisticated non-alcoholic tonics and lightly stimulating botanical-infused lifestyle drinks that elevate not only special occasions but everyday social moments.

TREND 2:

“Beyond Sweet”*The Rise of Layered Sensory Sophistication*

While sweet flavor profiles are still popular with consumers, changing lifestyles are also driving people to look for more complexity and unique sensory experiences in their beverages.



Globally, 78% of occasions demand sweet profiles.

However, the beverage market is oversaturated with sweetness and underdeveloped in complex sensory architecture. The opportunity is to layer – sweet + spicy, sweet + sour, sweet + savory – by introducing controlled bitterness, salinity and botanical notes into familiar formats. These layered flavor profiles will continue to trend with beverage consumers that have mature, sophisticated palates.

Consumer Segments Ready for a New Flavor Frontier**Craving Calm and Sharp & Energized – sophisticated sensory intrigue.**

These consumers are leading the shift toward more sophisticated flavor experiences that do not rely on overt sweetness. This includes a stronger openness to bitter, botanical, tart and layered taste profiles, while also seeking balance and nuance among bold contrasts.

Celebration Elevated – adventurous by appetite.

This segment represents the broadest flavor opportunity of all eight segments. These consumers actively seek novelty, making them highly receptive to unexpected flavor combinations, elevated sensory experiences and cross-category experimentation. Flavor pairings like raspberry lychee and pink pineapple, along with indulgent experiences like dirty sodas, resonate with this group.

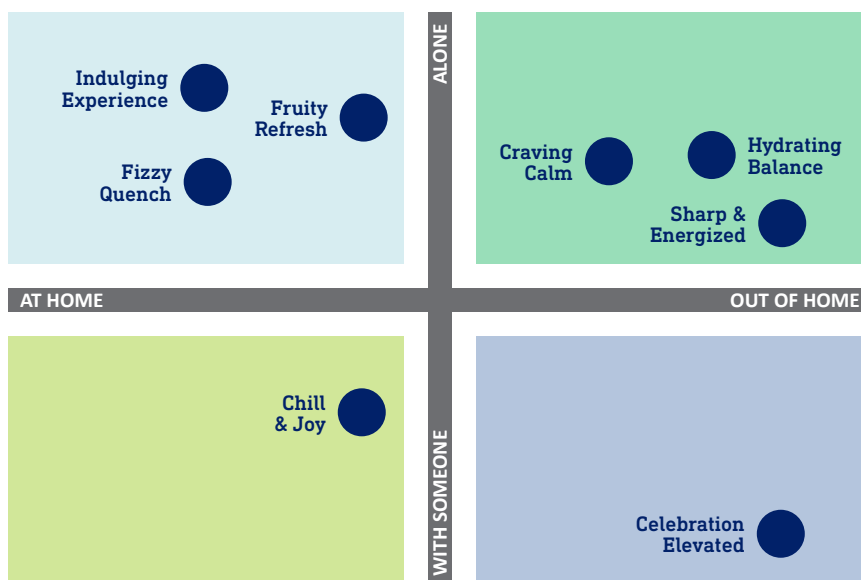


TREND 3:

“Occasion Polarization”

Solo vs. Social Moments

Preferences around drinking location and social context provide strong clues as to which segment(s) consumers may fall into at any given moment.



Decoding the Four Quench Quadrants

Alone x At Home

- Indulging Experience
- Fizzy Quench
- Fruity Refresh



There is opportunity for subtle health support, cleaner labels or improved mouthfeel, as long as it doesn't disrupt already high satisfaction.



Alone x Out of Home

- Craving Calm
- Hydrating Balance
- Sharp & Energized



The innovation opportunity is strong. These consumers are open to trying something new, perhaps with botanical complexity.



With Someone x At Home

- Chill & Joy



These consumers are highly comfortable and satisfied in this social, at-home environment, which may increase receptivity to new flavor experiences.



With Someone x Out of Home

- Celebration Elevated



Dissatisfied with current beverage choices and adventurous — the prime target for premium non-alcoholic alternatives and elevated social drinks.



So, What's the Secret Ingredient?

The next wave of non-alcoholic beverage innovation won't be won on refreshment or sweetness alone. It will be won by brands that can do four things at once across product segments:

- **Reduce calories while increasing sensory complexity.**
Less sugar doesn't have to mean less interesting. Layered profiles, botanicals and controlled bitterness – such as herbal fruit tonics and matcha-citrus blends – give consumers more to taste with fewer trade-offs.
- **Elevate non-alcoholic beverages into premium social experiences.**
Think craft-quality flavor, sophisticated visual cues and a sense of occasion. Develop drinks to anchor a celebration, not just accompany one.
- **Embed function into emotional narratives.**
Lead with how a drink makes someone feel – calm, alert, balanced, celebrated – and let functionality reinforce the story.
- **Design for occasion micro-moments.**
Solo at home, social out of home, mid-day pick-me-up, evening unwind — each moment is a distinct opportunity for innovation.

Ready to Bottle the Next Big Beverage?

From sweet to savory, calming to energizing, solo sips to social rituals, ADM brings consumer insight, flavor expertise and a full beverage ingredient portfolio to help brands design drinks that meet the moment.

ADM Outside Voice™, Lifestyle-driven Innovations in Non-alcoholic Beverages, 2025

