THE : FUTURE : LABORATORY

Liquid Intentions

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Cover: Non, UK; above: Dirty Shirley by Black Lines, UK

At a Glance

Key topics and takeaways from the report



Dirty Shirley by Black Lines, UK

Social media will continue to fuel novelty, giving rise to 'boom boom' formats: limited editions, niche viral flavours and visually striking presentations. Shareable experiences must be built into new product design



Feeling, UK

Drinks now deliver measurable value, boosting energy, focus, recovery and wellness. Functional formulations turn every sip into a purposeful, science-backed performance-enhancer



Nowadays, US

Driven by relentless cost of living pressures, home rituals will be shaped by the need for relaxation, pleasure, self-care and indulgent little luxuries. Evenings will become moments of individual pleasure, transformed into comforting, sensorially rich experiences



Master's Blend by TheOther, US

Future drinks will act as signals of identity – in a bottle. Branding, social events, celebrity tie-ins and customisable options will allow customers to express themselves and their individuality, and become part of a holistic lifestyle through every sip



Spectrum by Fitz's Bar at Kimpton Fitzroy London, UK

The flexitarian mindset will make drinking fully modular, from format to strength. Patches, micro-serves, mid-strength, zebra striping and micro-dosing enable intentional consumption, giving consumers ultimate control over their experience



Daybreaker at Othership Flatiron, New York, US

Next-gen beverages will blend science, craft and multi-sensory design to alter mood, perception and focus, letting consumers explore visceral sensations, test the edges of human feelings and capabilities and, when shared socially, create events that evoke a sense of collective transcendence



Tea House Senkutsu at Aman Kyoto, Japan

Future drinks will combine heritage, craftsmanship and ethical sourcing with experimental, lab-enabled ingredients. Storytelling, micro-farms and ancestral techniques will transform bars into spaces of cultural exploration



The Cycle, US

On the horizon, bespoke beverages will cater for health-focused consumers accustomed to personalisation; think tailored ingredients to support individualised self-repair and optimised health in the pursuit of longevity

A DAY OF DRINKS

At Home

Morning

From Acceleration to Rhythmic Balance

Morning energy is becoming decoupled from urgency and excess. Slower, ritualised performance protocols prioritise circadian alignment, flavour and sensory luxury.



Master's Blend by TheOther, US

Afternoon

From Meals to Micro-interventionsn

Fixed meals are giving way to liquid functionality. Ongoing micro-interventions of hydration and energy respond to bodily rhythms, with playful formats and emerging flavours supporting sustained balance over the afternoon dip.



Feeling, UK

Evening

From Winding Down to Outcome Design

Night-time drinking is being redefined as an experiential pathway. Functional mocktails and alternative highs enable targeted outcomes, transforming passive wind-down habits into deliberate rituals for restoration and pleasure.



Nowadays, US

A DAY OF DRINKS

Out of Home

Morning

From Standardised to Personalised

Out-of-home mornings are shifting towards modular self-expression. Customisable beverages, sober social rituals and portable innovations turn the everyday coffee moment into an experiential, participatory start to the day.



No Normal Coffee, Switzerland

Afternoon

From Refuelling to Cultural Participation

Beverage consumption is becoming a form of social signalling. Afternoon beverages now act as tools of identity and connection, where experience, brand affiliation, co-creation and cultural capital outweigh simple functional nourishment.



Daybreaker at Othership Flatiron, New York, US

Evening

From Binary to Fluidity

Evening drinking is moving beyond fixed categories. Zebra-striped consumption patterns embrace multi-sensory experiences and personal control, allowing individuals to navigate intoxication, abstention and intention on their own terms.



Non, UK

Key Statistics

Four in 10

consumers still indulge in discretionary spending, favouring food and beverages over personal care *(source: Deloitte)*





Two in five

of the population now buy functional drinks several times a month, rising to nearly two thirds (61%) of Gen Z *(source: Ocado Retail)*



Consumers are increasingly demanding clean, transparent ingredients, with 60% of them concerned about ultra-processed foods and

50% aiming to eat more fresh produce

(source: PwC)

The global prebiotics market is

projected to nearly double

from £5.17bn in 2023 to £9.73bn by 2029 *(source: Arizton)*

Images left to right: Non, UK; Non, UK; The Cycle, US

Key Statistics

24% of Americans

have at least partially replaced alcohol with non-alcoholic or cannabis drinks, led by Gen Z and Millennials, one in three of whom now drink THC-based drinks *(source: Drug Rehab USA)*



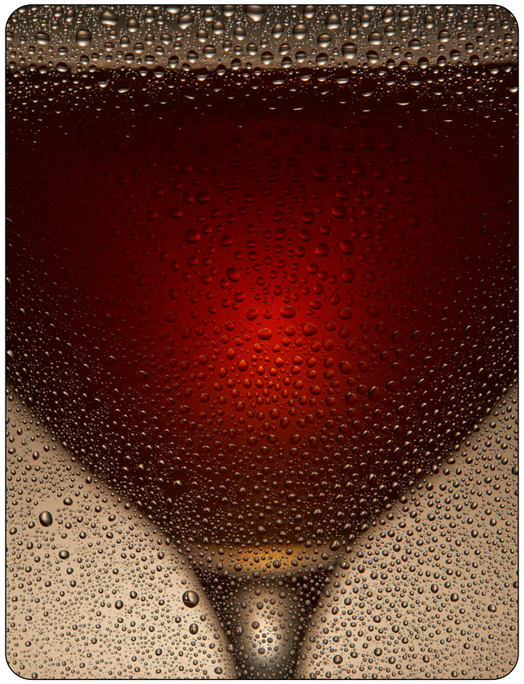
76%

of global consumers agree that when something is magical it lets them escape from the mundane and two-thirds prefer spending time in places that spark imagination *(source: VML Intelligence)*

75% of UK 25–34-year-olds

host meals for friends at home, motivated by love of cooking and cost-effectiveness *(source: Lakeland)*





21.5% of Gen Z

abstain from alcohol entirely, while 39% consume it only occasionally *(source:* Attest*)*

Images left to right: Nowadays, US; Future Château, UK; Non, UK

Introduction

What are the new opportunities, rituals and needs shaping the future of drinks? From morning until evening, we track a future day of drinks in which every sip must earn its place through flavour, function and form

Lead analysts

Fiona Harkin, *director of foresight*

Seyi Oduwole, *foresight analyst*

Contributors:

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Passive drinking is over. Consumption has become a costume: chosen, layered and expressive. Beverages are no longer background behaviour; they are cultural artefacts, signalling values, identity and aspiration. Today's consumers are educated, adventurous and intentional, understanding not just what they consume but why and what it says about who they are.

We are entering an era of abundant choice and zero tolerance for mediocrity, inherited rituals are eroding, fixed life stages are dissolving and consumers are curating a selection of liquids to reflect moods, beliefs and identities.

Crucially, neutrality is obsolete. Legacy brands are being overtaken by challengers promising more compelling experiences and the brands that excel will choose a clear position, a world view, a tribe. In doing so, they will create loyalty through conviction, embedding themselves into consumers' new beliefs about health and identity.

Why have five drinks when you can have five in one? Drinks now blur the lines between supplements, meals and rituals, compressing entire categories into a single sip. Hybridisation is set to be the USP of future beverages.

Katie Ayoub, trends expert, food service consultant and managing editor of Flavor & The Menu, tells The Future Laboratory: 'Beverage has become the easiest on-ramp [way] for consumers to try something new: a new flavour, a new function, a new ritual… the categories with the most velocity are the ones that blur the lines between hydration and function, refreshment and indulgence, energy and calm, morning and late night.'

In the bigger picture, social structures are fragmenting amid a period of widespread instability. Urban living is becoming faster and more isolating, and long-held certainties, such as linear life stages and predictable achievements, are out of reach for more and more people. What does this mean from day to day? Consumers are finding new ways to anchor their day and regulate their physical and psychological being. Across alcoholic and non-alcoholic categories, beverages must work harder than ever to maximise this opportunity.

In a pressurised economy, bang for buck matters – but so too does meaning.

Circadian rhythms are emerging as a critical driver of opportunity. Whether consumed alone, socially, at home or out, drinks power mornings, smooth afternoons and amplify nights.

In this landscape, value is defined by versatility, not volume. Drinking is shifting from category to synchronisation with the body and day. This report imagines the future consumer's day of drinks as a series of deliberate choices: hydration that performs, caffeine that sharpens, alcohol that signals status and alternatives that promise controlled euphoria or a moment of serenity.

It serves as a handbook for navigating this complexity, highlighting where brands can create relevance by aligning with real daily rhythms rather than outdated occasions. The greatest opportunity lies in designing drinks that feel truly worth it and are capable of standing out in a world drowning in sameness.



'Beverage has become the easiest on-ramp [way] for consumers to try something new: a new flavour, a new function, a new ritual… the categories with the most velocity are the ones that blur the lines between hydration and function, refreshment and indulgence, energy and calm, morning and late night'

Katie Ayoub, trends expert, food service consultant and managing editor, Flavor & The Menu



Methodology: **Overview**

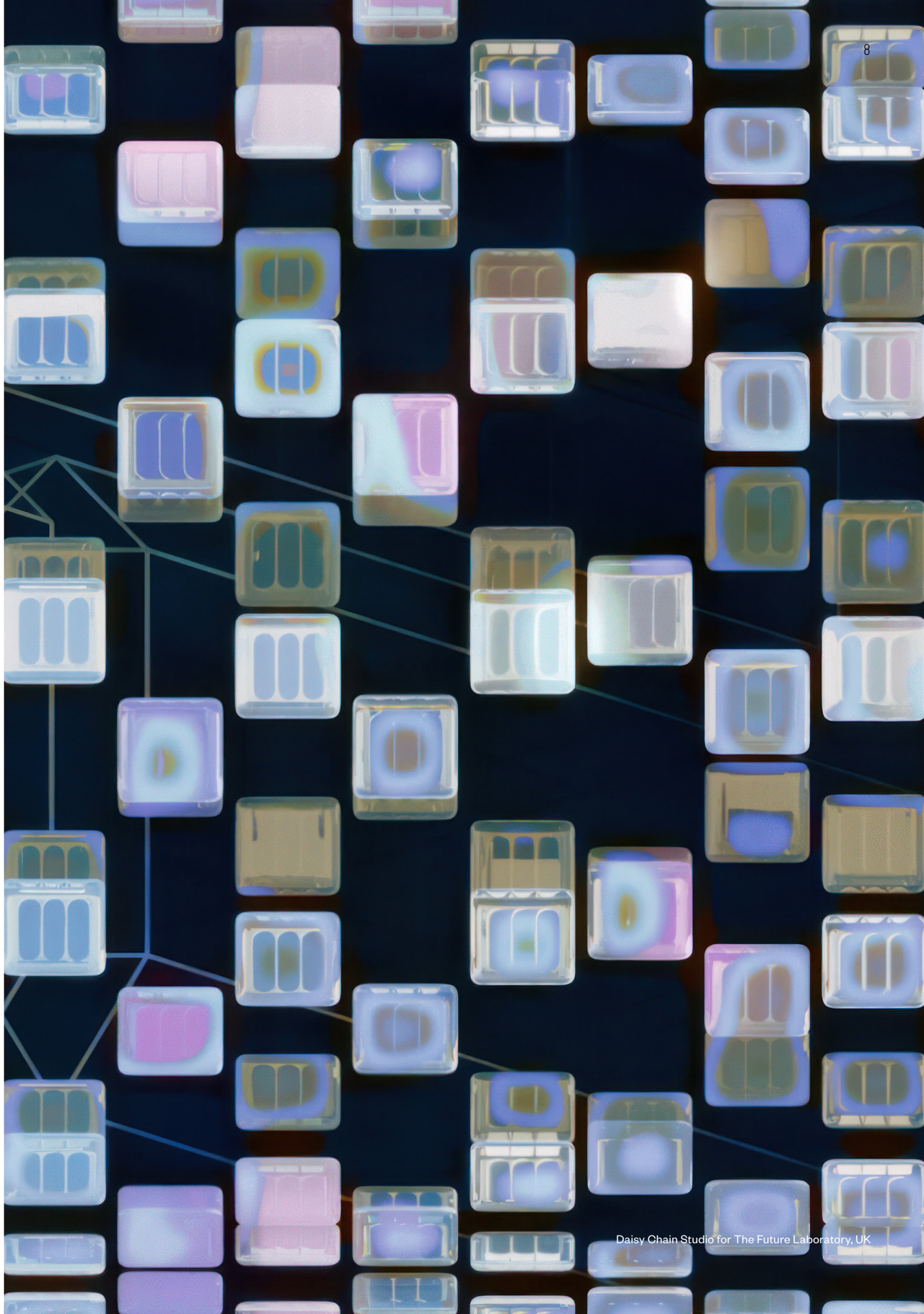
Strategic foresight is the most valuable tool you can adopt to identify future prosperity. Despite our reputation for getting it right, we can't predict the future. There is no crystal ball.

However, our methodology enables clients to interpret and frame all their decisions about future risk within a brand, consumer or organisational context that is **provable**, **practical** and **minimises uncertainty**.

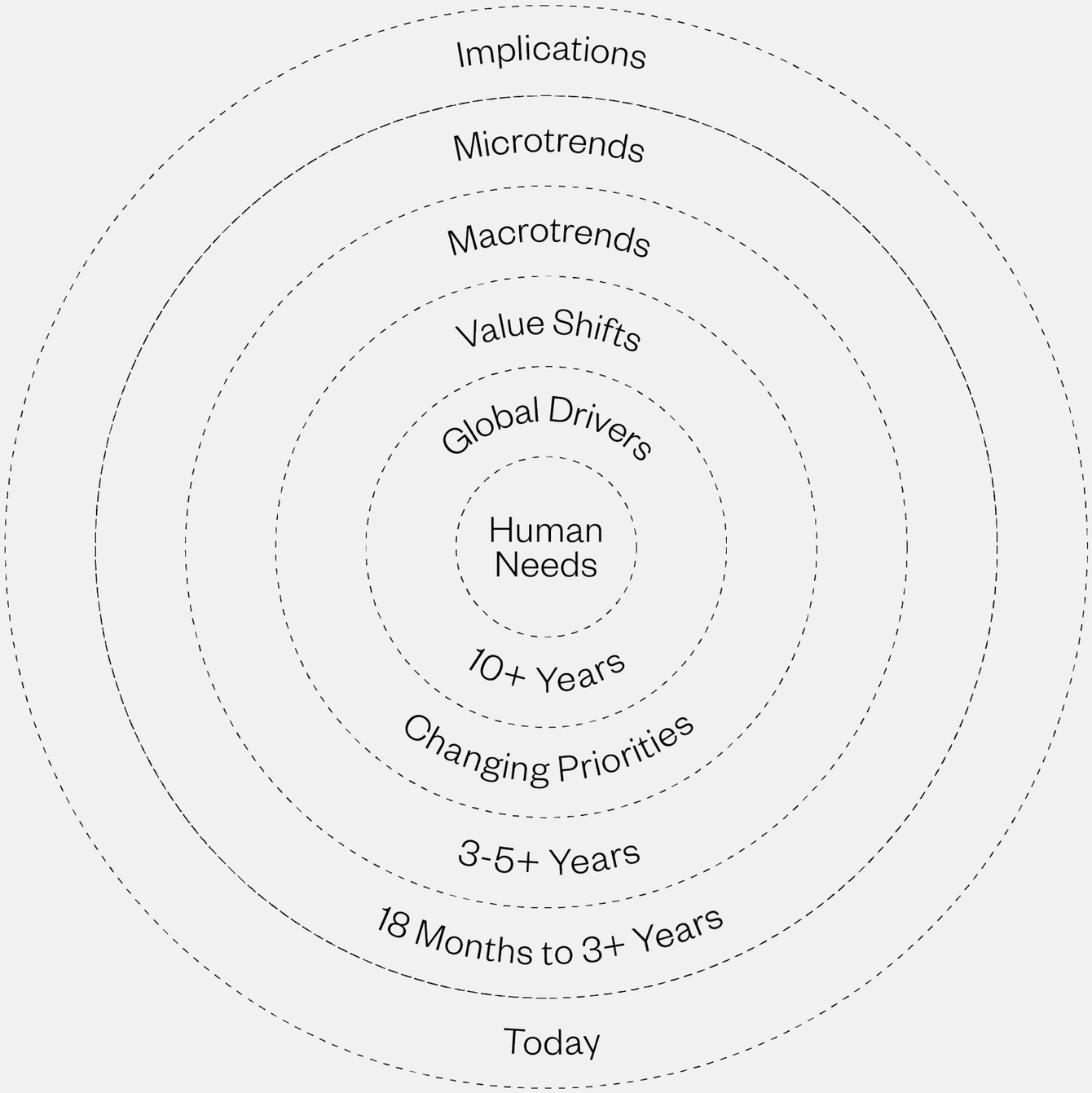
We do this by understanding the influence of **six global drivers** causing profound, consistent – and therefore relatively predictable – change.

Their impact is assessed against seven core human needs and the ensuing value shifts that change consumers' attitudes and behaviours.

This leads us to identify emerging **macrotrends** and **microtrends**, and ascertain what their implications are for the future landscape.



Daisy Chain Studio for The Future Laboratory, UK



The Future Laboratory's proprietary foresight methodology

Methodology: **Foresight Process**

At the heart of The Future Laboratory is a unique proprietary methodology that allows us to determine, define and track the key drivers of change affecting the future. We do this by tracking:

Human Needs : Universal

The foundation of our society based on a value system that supports human nature's physical and emotional programming.

Global Drivers : 10-years+ Horizon

Key global drivers represent the cultural, social, economic, political, technological and environmental eventualities reshaping the world we live in.

Value Shifts : Ever-evolving

The new ways in which we strive to meet these human needs, shaped by our contemporary context.

Macrotrends : 3–5 years+ Cultural and Societal Shifts

The cultural manifestations of new and emerging attitudes worldwide as shown by the behaviours of innovators and early adopters.

Microtrends : 1–3 years+ Lifestyle

Specific and tangible business innovations already emerging across key lifestyle categories.

Methodology:
Global Drivers



Accelerating Technologies

For billions of people around the world, technology has become enmeshed with their humanity – often clashing as we adjust to this new Synthocene Era. Adoption and innovation continue to accelerate, specifically AI, and increasingly, quantum technology.



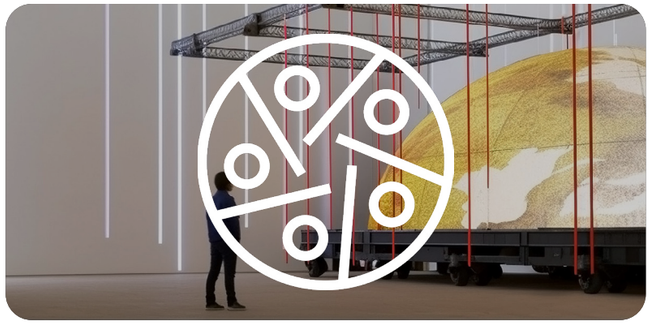
Climate Crisis and Resource Scarcity

We are at a climate tipping point, with increasing disruption and devastation across the globe. Urgency has turned into emergency, existentially threatening humanity and industry. But a growing sense of pragmatism over doomerism is clashing with industry roll-backs on sustainability commitments.



Evolving Demographics

Over the next decade the shape of our global population will change dramatically. Global economic instability due to falling fertility rates and ageing populations in some regions may be rebalanced by a growing youth workforce in others – with far-reaching repercussions for societies and industries.



Fragmenting Societies

Fractious inequalities and divisions are being exposed in a fast-changing, unstable world. The deterioration hinges on the increasing fragility and fragmentation of social, political and environmental ideologies, driving factions into isolated silos and societal polarisation, with apathy and misinformation clouding the way forward.



Micro-globalisation

The liberalised world we live in is inextricably interconnected but it has left us in a state of co-dependency rather than cooperation. Without equitable alignment, resilience may never come from an integrated and interdependent global economy, championing a renewal of localism and national pride.



Urbanising World

Despite the repercussions of a global pandemic, cities remain the epicentres of society. Priorities for living, working and playing in these urban environments are being redefined, with liveability, connectivity, sustainability and health and wellbeing becoming expectations rather than aspirations.

Drivers

From ‘boom boom’ spectacles to longevity liquids, today’s drinks deliver wellness, indulgence and identity, acting as the ultimate connector of social, health and cultural experiences globally

What are the drivers of a macrotrend?

These drivers define the landscape from which the macrotrend is emerging, detailing the consumer attitudes, market and sector shifts, as well as the cultural, social, economic, political, technological and environmental forces shaping a macrotrend. Each driver emerges from one or more of our global drivers



The X Factor

Drinks are now stages for spectacle, social signalling and sensory thrill, where audacious flavours, textures and visuals deliver micro-escapes from daily life.



Longevity Liquids

Brands are taking cues from the food-as-medicine movement, blending functional benefits with daily ritual. Products are evolving into tools for longevity, preventative health and optimisation.



Joy Divisions

In a world dominated by digital distraction and disconnection, the analogue-seekers are emerging. They seek human-led journeys, with beverage brands serving as facilitators of identity-driven social experiences.



Thirst for Life

Under economic pressure, savvy, value-conscious consumers demand beverages that deliver not only joy or function but return on investment too.

The X Factor

The awe economy is reshaping consumption, turning everyday drinks into extraordinary, shareable experiences that break routine and demand attention.

Digital immersion has rewired how consumers discover, desire and decide what they ingest. Social media FOMO (fear of missing out) drives behaviour, as viral sensations demonstrate, from Starbucks' Bearista Cold Cup that sold out instantly in the limited time to TikTok Shop Dubai chocolates.

This dynamic has been a catalyst for the rise of eater-tainment, where drinks merge with experiences, such as ASMR (using eating sounds to create a satisfying, sensory experience) and Mukbang videos (detailing a person eating food while interacting with an audience), prompting consumers to first eat with their eyes and ears.

YOLO-driven (you only live once) hedonism is further intensifying the desire for absurdity, humour and escapism from a fragmented, high-pressure world. Drinks must now deliver multi-sensory pay-offs such as layered textures, bright colours, fizz, foam, crunch and aroma.

Trends originating in Japan, South Korea or the UAE now reach global audiences within hours. The world's first date-based soft drink Milaf Cola from Saudi Arabia was launched in UK stores within six months of its debut, highlighting the rapid pace of global influence.

Drinks that fail to surprise risk invisibility. In this climate, legacy brands must remix their classics, while newer brands should cut through by establishing a distinct, oppositional identity. It's in this way that The X Factor refers to the ingredients of spectacle, social signalling and sensory transcendence – all in one cup.

Global Drivers
Micro-globalisation, Accelerating Technologies

Technology is woven into daily life, connecting people globally, accelerating trends, flattening culture through decentralised networks and enabling faster discovery of new cultural flavours



Starbucks Bearista Cold Cup, US

‘With TikTok Shop, whether right or wrong, we’re living in a time when people trust influencers and their recommendations, sometimes even more than science’

Grace Bryan, CEO, Juicy Brick





Left and above: AG1 is positioned as an all-in-one daily nutrition supplement that mirrors a wider societal move towards preventative health, longevity and food-as-medicine mindsets, US

Longevity Liquids

The Great Healthification of drinks is now mainstream, driven by highly educated consumers who are sceptical of traditional institutions and seeking alternative ways of betterment. They act as their own at-home doctors, using wearables and self-diagnosis apps to integrate beverages into their hyper-personalised, quantified lifestyles.

PwC’s 2025 Voice of the Consumer report shows that 33% of respondents switch brands primarily for health benefits. Consumers are increasingly demanding clean, transparent ingredients, with 60% of them concerned about ultra-processed foods and more than 50% aiming to eat more fresh produce (source: PwC)

Socially, the rise of types such as the Huberman Husbands (self-optimising men), Bubble Girls (non-toxic/clean lifestyle consumers) and Crunchy Wellness Teens (health-conscious young people) reflects aspirational, chronically online communities that share routines, hacks and personal health experiments.

Beverages are evolving from refreshment to nutritional nourishment. Coffee leader Starbucks’ introduction of protein lattes and cold foam, along with beverage giant PepsiCo’s acquisition of prebiotic soda brand Poppi, signal the normalisation and widespread adoption of ‘better for you’ and ‘supplemented with’ drinks.

Functional ingredients, GLP-1 (appetite regulator) awareness and botanical supplements have triggered a desire for measurable benefits, while new consumption rituals, namely zebra striping (alternating alcoholic and non-alcoholic beverages), denote moderation and control.

Brands should consider how they can make health-conscious consumers’ lives easier with clear ingredient transparency and seamless integration into daily protocols and health stacks, positioning themselves as part of a holistic longevity lifestyle.

Global Driver
Evolving Demographics

Rising aspirations for longevity and self-actualisation, combined with shifting demographics, are driving better-for-you drink demand and seismic change in legacy brand responses

Joy Divisions

Now more than ever, third spaces must be a part of every brand's engagement strategy. Craft cafés, tea houses and combination bars (non-alcoholic and alcoholic) entice consumers seeking an analogue escape, participatory rituals and a community to match.

Among younger consumers, there is a wider movement towards de-risked plans, catch-up culture, low-key homely affairs and celebrating micro-milestones rather than traditional achievements.

As Gen Alpha's penchant for Asian flavours continues to grow, bubble tea and matcha cafes such as Blank Street are rising in prominence as their hangouts of choice. Gen Z oscillate between wellness-focused weekends and embracing rebellious, indie-sleaze, messy lifestyles triggered by Charli XCX's 2024 Brat album. Meanwhile, Gen X and Boomers are redefining mid-life through vibrant social bucket list rituals and travel exploration in their golden gap years.

Retailers can also play a part here; sponsored hangouts such as electrolyte-powered running clubs are facilitating spaces for subcultures and niche fan communities. This is essential considering that traditional nightlife is in decline globally (source: The Financial Times). In addition, 75% of UK 25–34-year-olds host meals for friends at home due to cost-effectiveness and their love of cooking (sources: Night Time Industries Association, Lakeland).

Brands must look to intertwine themselves with like-minded social and community spaces, or find ways to support homely, intimate affairs where connection feels more intentional.

The future of beverages is in designing drinks and experiences that act as connectors, performance tools and playful instruments of belonging.

Global Driver
Fragmenting Societies

Amid a global digital dependency epidemic and increased isolation and atomised lifestyles, consumers are craving real-life social connection and IRL meet-ups are on the rise, with food and drink serving as powerful ways to connect and satisfy this desire

75% of UK 25–34-year-olds host meals for friends at home, blending cost effectiveness with skill-sharing

Source: Lakeland

Prebiotic soda brand Poppi recruited Charli Xcx and Rachel Sennott for their Super Bowl commercial, reflecting Gen Z's oscillation between wellness and partying, US

‘The most successful brands will be the ones that can effectively communicate value, aligning consumer desires with the deeper beliefs that matter most to them right now’

Andi Davids, chief growth officer, Bulletproof

A Taste of Tradition

Aman opened the Tea House Senkutsu, a traditional tea house, at its Kyoto resort for visitors to experience an authentic tea ceremony in beautifully crafted surroundings, Japan

Thirst for Life

The balance of purpose with emotion has never been more delicate in the New Value Wars. But value-consciousness doesn't outweigh values; brands must deliver what they promise.

Our New Codes of Value macrotrend outlines the relational economy in which consumers seek richness, depth and rituals in every product, turning everyday consumption into meaningful experiences. They are also increasingly adopting a flexitarian mindset, blending indulgence, rituals and kidulthood-driven nostalgia to reclaim agency, joy and a sense of micro-control.

Whether it's hypebeast groceries, posh pantry shelfies or the rise of celebrity-led brands, beverages are becoming vehicles for identity expression and emotional connection through parasocial relationships. US TikTok influencer Alix Earle's margarita brand SipMargs, for example, embodies the messy-chic 'party girl' persona for her Gen Z college-age followers.

In the US, 65% of Gen Z prefer to drink at home and 27% at friends' houses (source: Attest). Indeed, as value-seeking rises, consumers are looking for brands that elevate the at-home experience with high-quality, indulgent products. As detailed in The Future Laboratory's Bougie Basics report, as consumers romanticise everyday routines, they seek brands that elevate small moments through quality and care.

Despite economic strain, 86% of diners adjusting habits and 33% choosing lower-cost items, about four in 10 still indulge, prioritising food and drink over personal care (sources: Eater, Deloitte). In a value-conscious economy where loyalty is fading, every purchase must be earned through tangible satisfaction, purpose and emotion.

Global Driver
Evolving Demographics

Amid economic turbulence and social fragmentation, consumers seek small luxuries and trusted, transparent beverages that deliver meaningful experiences in a scrutinised, value-conscious world

52% of UK consumers have had to cut back on non-essentials, but **four in 10** still indulge in them, driven by escapism and mood-boosting desires

Source: KPMG



Hard-seltzer brand White Claw opened a corner shop pop-up dedicated to house parties, London, UK

Insight

An era of beverage abundance is emerging. From daybreak to nightfall, drinks are fuelling awakening, productivity and relaxation, evolving into all-day tools for performance and pleasure, shaped by personal rhythms and flexible consumption choices

What is Insight?

Insights explore the nascent consumer behaviours, attitudes and trend responses emerging today that will evolve or gain traction in the near future through to 2030. Insights help brands and businesses to understand and identify the opportunities presented by this trend



Rising Rituals

In-home morning drinks opportunities are being re-invented around performance, calm and longevity, with fibre, functional boosters, artisanal coffees and ritualistic teas.



AMplify

From on-the-go formats to cold, customised drinks and coffee shop raves, coffee culture is shifting towards flexible consumption and back to daytime social connection.



The Kaleidoscopic Quench

Afternoon hydration is taking centre stage. The future beverage line-up will include nutrient-dense beverages, gamified formats and immersive retail experiences to meet modern energy and wellness needs.



Beverages of Belonging

Beverages have evolved into cultural markers, blending customisation, social connection and playful identity. Fast food chains are embracing this shift, offering innovative drinks that reflect individuality.



Homebody Hydration

Consumers are embracing wellness drinks as part of their ritualised evening routines at home, fuelled by shifts such as going Cali-sober (California), little treat culture and hyper-personalisation.



Epicurean Elixirs

A new wave of drinkers are rejecting strict wellness regimes and instead blending indulgence, social catharsis and experimentation with alcoholic and non-alcoholic formats, resulting in a redefinition of moderation.

Maïzly, US

Rising Rituals

The first drink of the day has evolved into a ritual of self-optimisation, reshaping mornings around performance, calm and longevity. Beverages now replace supplements and breakfasts, helping consumers synchronise body and mind for the day ahead.

This value-driven moment is defined by slowness and intention, as ritualist consumers savour mindful, ceremonial experiences that prepare them for what's to come.

Protein's moment may have peaked as the market becomes oversaturated, while fibre is emerging as the new star, promising fullness, focus, gut-brain resilience and defence against microplastics, according to Mintel. Over half of Britons (54%) say TikTok's 'fibremaxxing' trend has influenced them (source: Censuswide). This is driving the rise of fibre coffees, prebiotic teas and hot broths, with the global prebiotics market projected to nearly double from £5.17bn ($6.95bn, €5.96bn) in 2023 to £9.87bn ($13.26bn, €11.38bn) by 2029 (source: Arizton).

Katie Ayoub of food and flavour publication Flavor & The Menu argues: 'Functional ingredients win when they ride into culture through beloved formats… not when they ask consumers to learn a new ritual.' Shot culture is evolving into AM/PM protocols, as seen in UK-based food retailer Marks & Spencer's functional shots.

The popularity of traditional 'builders' tea' (British black tea) is fading. Despite this, Assam, Darjeeling, dandelion, elderberry and hojicha (poised as the new matcha, amid crop shortages), are on the rise. In the US, Karak (a middle eastern spiced tea) and Vietnamese coffee are gaining in popularity, with American brand Fat Milk leading the charge. Alternative milks are diversifying globally, from US corn milk brand Maïzly to bambara nut milk and camel milk brands like UAE-based Camelicious.

Increasingly, brands are taking on the role of habit purveyors; tea ceremonies and at-home machines are turning coffee and tea into rituals to be savoured. Chinese brand Teapresso uses high temperature and pressure to extract tea's fragrance and sweetness. Similarly, US-based cold brew machine Cumulus uses nitrogen from the air to create smooth, creamy, naturally sweet nitro coffee at home, bringing café-quality indulgence to daily routines.

> 'Functional ingredients win when they ride into culture through beloved formats… not when they ask consumers to learn a new ritual'
>
> *Katie Ayoub, trends expert, food service consultant and managing editor, Flavor & The Menu*



Above and right: Coffee shop pop-up by Ikea and Lab54, London, UK

‘A lot of people are sick of going out, they want a change from nightlife. They are more conscious about drinking too much, so [coffee shop raves] are a good alternative’

Tanya Thadani, CEO, Coffee Culture UK

AMplify

Morning drinks are evolving beyond simple caffeine and prime barista brews, becoming customisable, experience-driven and delivered in innovative formats that can fit seamlessly into contemporary, on-the-go lifestyles.

Customisation is on the rise in coffee shops, with a new roster of wellness ingredients. Consumers now seek energy without chaos and calm without sedation, embracing ingredients such as reishi, lion’s mane and L-theanine.

Cold coffee continues to surge. Starbucks reports that 75% of US sales are cold drinks, with over 60% customised in Q3 2023 (source: Perfect Grind Daily). The nitro coffee market is projected to grow 25% annually until 2030 (source: Industry Arc).

Cold foam has become a versatile canvas for functional, seasonal and flavoured twists, supporting consumer customisation. According to Tastewise, in 2025 interest in cold foams targeting hormone balance rose by 55% year on year (YoY), those for stress relief 30% YoY and for metabolism 24% YoY.

Experience-driven daytime socials, coffee raves and sober events blend music, performance and community, including: DJ initiative, Lab54; homeware retailer Ikea in the UK; and coffee shops Matcha Mia in the US and Corridor Seven in India. These activations transform coffee shops into hubs of energy, connection and accessible indulgence.

Tanya Thadani, CEO of Coffee Culture UK, says: ‘People want a change from nightlife. They are more conscious about drinking too much, so this is a good alternative’. Brenda Vilchis, owner of Matcha Mia, adds: ‘People are getting into a healthy lifestyle, without going out, without a hangover, without wearing high heels.’

Elsewhere, innovative formats are reshaping convenience and indulgence for busy, modern lives. American drinks brand Poda’s matcha tubes and No Normal Coffee’s portable brews cater for on-the-go lifestyles, while Diamond Brew offers freeze-dried coffee crystals. The Nitro Café in the UK provides sprayable coffee concentrates. Similarly, US-based tea brand Cuptone integrates portable all-in-one tea strainers while Indonesian coffee brand Tibasuka sells ready-to-pour pouches.



In 2025 interest in cold foams targeting hormone balance rose by **55%** year on year, those for stress relief **30%** YoY and for metabolism **24%** YoY

Source: Tastewise

Cold Coffee

Cumulus Coffee has created the first-ever solution for brewing premium cold brew, nitro cold brew and cold espresso at home in a matter of seconds, US

The Kaleidoscopic Quench

In the afternoon, hybridisation is blurring the lines between food and drink.

Benefit-led beverages are rising, driven by smaller meals, nutrient density and changing energy needs. Consumers are becoming convenience-driven ‘flexible fuellers’ imbibing hydration and energy.

Savoury and anti-sweet profiles are gaining traction as consumers tire of sugar-heavy drinks and look to more filling flavours. Salted sour citrus blends, tropical-savoury hybrids and umami-led options are emerging: prebiotic sodas, black vinegar spritzes and light broths, such as US-based Gobbi’s savoury energy drinks.

As Flavor & The Menu’s Katie Ayoub speculates: ‘Electrolyte-forward waters and salted lemonades are on the horizon. Salt has become a wellness cue, not a villain. TikTok has accelerated the reframing of sodium as a hydration tool.’

The growing importance of optimal hydration has also led to water innovations including hydrogen infusions, kefir, kimchi, cinnamon and maple water, led by Canadian brand Maple 3.

Convenience formats are expanding rapidly, including oral strips, sachets, gummies, edible drops and transdermal patches. British brand Feeling champions the idea of making nutrition more approachable and fun, promoting the ‘sexy way to supplement’ through its smiley face caffeine energy patches.

In the energy category, hybrid formats now combine caffeine, adaptogens, electrolytes and nootropics to support focus, gaming and state-of-flow work. US brands such as Brainwater, Ketone-IQ, Magic Mind and Monster’s female-focused drink FLRT reflect demand for clean, sustained energy without the crash.

In August 2025, US-based Nic and Jet Fuel announced Nicotina Energy, a nicotine-infused energy drink containing rhodiola rosea extract and yerba mate. It is designed to meet rising demand for focus following the popularity of Zyn nicotine pouches in recent years.

Retail innovation is crucial as a response to the rise in direct-to-consumer subscription models. Branded vending machines from US-based AG1 and Huel alongside elevated convenience concepts – see Los Angeles’ Maggie’s petrol station and White Claw’s Claw-nershop in London – are transforming everyday retail into functional, social hubs.

‘The rise of GLP-1 adoption is accelerating interest in drinks that offer satiety, balanced blood sugar and nutrient density’

Ravi Jhalar, vice-president of commercialisation, Fedup Foods



Feeling, UK

Beverages of Belonging

Quick-service restaurants (QSRs) are courting customers by offering hyper-specific signature drinks. In 2025, several fast food chains across the globe started expanding their beverage menu: McDonald's integrated CosMc's drinks into its core menu and Crumbl introduced over 40 varieties of dirty sodas. The rise of drive-through and QSRs are helping these brands make new-era beverages more accessible for customers on the go.

Similarly, texture-driven, indulgent drinks are on the rise. In May 2025, US-based coffee chain brand Dutch Bros Coffee tapped into this trend with mochi-topped beverages and pickle lemonade, respectively.

Flavor & The Menu's Katie Ayoub tells The Future Laboratory: 'We're entering the era of the wellness coffee shop, where every drink is a carrier.' The beverage serves as a base that consumers can customise with add-ons.

Asian-flavoured iced beverages are gaining in popularity, driven by consumers' desire for subculture identity stacking.

The taste nomad is a consumer driven by curiosity and exploration, constantly seeking new flavours, global inspirations and novel taste experiences, while tailoring basic drinks to their individual preferences.

The rise of Chinese new-style tea (modernised tea beverages that blend traditional tea culture with trendy ingredients and aesthetics, such as milk tea with taro balls) is expanding into the US, with brands including Auntea Jenny, Molly Tea and Hey Tea opening stores.

Drinks brands are fostering social connection in unusual ways. Shoreditch & Soul's collaboration with Karmaceuticals highlights drink-infused sober wellness, while the number of morning dance parties in the US rose by 20% between H1 2024 and 2025, and sauna raves and cold-plunge parties increased by 256% (source: Eventbrite).

Luxury brands such as Prada and Louis Vuitton are using beverages to drive engagement at their cafes. In addition, beer brand Beavertown and suicide prevention charity Calm's mental wellness beer gatherings in the UK, and the rise of China's youth-friendly cheap eats canteen gatherings, show that consumers are using beverages to connect and socialise.

Moving beyond traditional nightlife and retail, brands should explore partnerships with community spaces or create branded meeting hubs for niche communities.





Left and above: Daybreaker sauna rave at Othership Flatiron, New York, US

'Human connection is going to become more and more important as more and more of daily American life is turned into an automated experience'

Tim Arpin, chief growth officer, Scooter's

Homebody Hydration

Amid the cost of living crisis, evening mocktails are becoming part of the new nightly ritual. The aim of this liquid diet is to blend relaxation and pleasure with beauty and wellness. Consumers are becoming pleasure architects, using functional beverages with ingredients like magnesium, ashwagandha, kava and gaba to support wellbeing and craft intentional, indulgent evenings.

Beauty drinks like those pioneered by Singapore's Kino Biotech have grown into a £1.43bn ($1.93bn, €1.64bn) market that is projected to reach £2.30bn ($3.10bn, €2.63bn) by 2028 (source: Data Intelligence). Emerging ingredients such astaxanthin, prized for skin protection and anti-ageing, reflect rising demand for ingestible beauty.

Japan's Meiji, The Philippines' Dear Face and Thailand's Sappe lead with l-glutathione and collagen-infused dairy drinks, while Italy's Corazéo blends hydration with hyaluronic acid and the US's Pretty Tasty offers sparkling beauty teas.

In the US, Pain Punch targets inflammation with turmeric and algae-based Omega-3, while The Cycle's superfruit teas are designed to ease premenstrual syndrome- and period-related symptoms. In addition, Human Desire's libido-supporting drink caters for those seeking to enhance intimacy. In the UK, Tom Parker Creamery's bedtime milk signals the rise of evening-positioned dairy products.

Sales in the Cali-sober category (focusing on alternative highs to alcohol) rose to over £743m ($1bn, €850m) in 2024, reflecting a shift towards mindful self-care (source: Business Wire). Food futurist Mike Lee tells The Future Laboratory that 'the low- and no-alcohol trend is shifting towards optimisation, with products offering micro-dosed relaxation'.

Alternative highs like THC- and CBD-infused beverages are surfacing online under playful labels such as 'gardening drinks'. Notable American brands include Wims! (cannabis) and Spruce (THC), both of which have launched convenient single-serve mixer packets. In addition, CBD brand Moow and THC brands Trail Magic and Nowadays offer accessible relaxation in RTD cans.

The opportunity for brands is in creating affordable indulgence with limited-edition flavours, elevated packaging and products that serve a deep purpose in consumers' betterment.

The global non-alcoholic drinks market was valued at **£1.08** trillion in 2023 and is forecast to reach **£1.61** trillion by 2030, expanding at a CAGR of **6%**

Source: Grand View Research

Nowadays, US

‘There will always be space for alcohol, but people are drinking differently. It’s more premium’

Grace Bryan, CEO, Juicy Brick





Above and right: Dirty Shirley by Black Lines, UK

Epicurean Elixirs

Drinking habits are shifting from casual to curated. Grace Bryan, CEO of Juicy Brick, tells The Future Laboratory: ‘There will always be space for alcohol, but people are drinking differently. It’s more premium.’

Yet alongside wellness-focused consumers, a new archetype is emerging: the wellness anarchists. These drinkers prioritise joyspan, pleasure and indulgence over disciplined, optimised routines, seeking cathartic release and human connection in social settings.

Zebra striping (switching between alcoholic and non-alcoholic drinks on the same occasion) reflects this balance of control and indulgence. More than a quarter of Germans and one in five young Canadians, Indians and Dutch consumers mix drinks on the same occasion, while trends such as the 60/40 (non-alcoholic and alcoholic) Guinness mix show further creative blending (source: Bacardi Global Consumer Survey).

Despite this, younger consumers still crave intentional nights of debauchery with RTD cocktails, such as American brand Buzzballz and British brand Moth, whose playful formats reflect this appetite for escapism.

In the US, food retailers have launched their own refreshers: Kraft Heinz’s Crystal Light and Black Lines’ Dirty Shirley are blending nostalgic childhood favourites with adult flavours.

Meanwhile, Japanese shochu and Mexican raicilla and sotol are being explored as discovery spirits, with searches for sotol rising 58% between 2023 and 2025, according to Mintel.

Out-of-home socialising is changing too. In restaurants, lighter formats and strengths are rising, from UK-based Future Château’s mid-strength wines to Spanish restaurant Legado’s three-sip mini-cocktails to sparkling teas serving as a new alternative on drinks pairing menus.

Dive bars and local pubs are resurging, with Guinness now accounting for one in six pints in London, according to Time Out London, driven by the rise of upmarket pubs like The Devonshire. Events such as Tate Cider Salon, featuring Roley’s Super Natural Lager, reflect the elevation of beer culture and pub sophistication.

Success increasingly depends on giving consumers control, allowing them to adjust their experience in real time through flexible formats and diverse choices.



Japanese shochu and Mexican raicilla are being explored as discovery spirits, and searches for sotol rose by **58%** between 2023 and 2025

Source: Mintel

Tasting Trios

At London-based Spanish restaurant Legado, each meal begins with the three-sip serve, a rotating selection of five seasonal fruit- and vegetable-based cocktails. Ceramics by Josefina Isaza. Photography by Sam Cornish, UK

Foresight

By the early-2030s, premium beverages will fuse provenance, craftsmanship and sustainability. DNA-driven personalisation will optimise wellness, while mind-altering formulations will create immersive sensory drinks and story-rich experiences that engage and delight consumers

What are the foresights of a macrotrend?

Foresights examine speculative future scenarios five to 10 years in the future. Building on the Insight section, they showcase new directions, divergence or developments



Scarcity Spirits

By the early 2030s, consumers will seek drinks that celebrate provenance, craftsmanship and sustainability. Seasonal, fermented and lab-enhanced ingredients will shape the premium category, based on story-driven beverages that honour heritage and climate resilience.



Enhanced Experiences

Immersive dining will merge craft, AI and multi-sensory spectacle, letting consumers co-create experiences where surreal drinks and storytelling turn meals into magical, unforgettable moments.



DNA-driven Drinks

The next decade of personalised health will harness real-time data to optimise the self-repairing body, guiding consumers' quest for longevity through bespoke beverages that adapt to lifestyle, biology and goals.



The Altered State

Beverages will become portals to altered states, allowing consumers to choose mood and feel sensations viscerally, bringing a new level of immersion and collective human connection.

Scarcity Spirits

Climate change and commodity fluctuations are driving demand for premium, artisanal, provenance-led products. By the 2030s, vanilla, coffee and cacao could become luxury goods. Climate-resilient crops such as Piwi hybrid disease-resistant grapes and Zack Denfeld's AI-powered farming supply chain Mock Wild are pioneering sustainable and innovative farming.

Wine writer, author and broadcaster Hannah Crosbie tells The Future Laboratory: 'How an industry which depends on the nuances of the climate adapts will be very interesting. It's possible that in the next 50 years, some styles of wine we love today will no longer exist.'

AI will increasingly safeguard and create ingredients, transforming how we perceive spirits. The UK agritech market, set to rise from £12.5bn ($16.9bn, €14.4bn) in 2025 to £31.8bn ($42.8bn, €36.5bn) in 2032, will drive sustainable, traceable and flavour-forward innovation (source: Persistence Market Research).

Consumers will favour venues using micro-farms, regional ecologies and low-impact practices. Cartagena's Alquímico in Colombia, ranked 11th best bar in the world, offers a three-floor journey from regional ingredients to re-imagined classics.

Flavour-forward, seasonal menus with fermented drinks like kvass, tepache and lassi will draw in consumers lured by the romance of narratives. New wines and spirits from Turkey, India, Texas and Japan will bring fresh storytelling-led experiences to high-end menus.

Luxury will centre on once-in-a-lifetime experiences rooted in land consciousness, rare ingredients and ancient practices. Premium spirits will become statements of provenance, craftsmanship and cultural heritage.



Mock Wild by Genomic Gastronomy, The Netherlands



Left and right: Panda & Sons, UK

Enhanced Experiences

Consumers are craving a sense of awe and magic in their daily lives. Some 76% globally agree that when something is magical it allows them to escape from the mundane, while two-thirds prefer spending time in places that spark imagination (source: VML Intelligence).

Alix Cherowbrier, creative strategy director at Bompas & Parr, forecasts: ‘Story-doing will define high-immersion experiences, while story-making will invite consumers to write their own narratives. Attendees will step into house parties or restaurants curated for them, balancing human craft with AI and tech-driven innovation.’

Powered by augmented reality and virtual reality technologies, dining will blur reality and fantasy, transforming meals into memorable, magical events. In the future, full sensorial engagement involving taste, smell, sight, touch and interaction will be expected. Drinks will defy reality; think formats suspending surreal forms and multi-texture play.

Panda & Sons in Edinburgh, Scotland, has pushed experimentation by applying cryo-concentration, freeze-drying and sous-pression to create menu items that are part science, part theatre.

As consumers shift from buying products to collecting experiences, hospitality venues will become designers, educators and curators, blending craft and AI to deliver unique, high-value experiences while preserving human connection, driving loyalty and differentiation in a crowded market.

76% of global consumers agree that when something is magical it allows them to escape from the mundane and two-thirds prefer spending time in places that spark imagination

Source: VML Intelligence





Biologica offers effervescent supplements designed to support women's hormonal health across every life stage, US

The global personalised nutrition market is projected to grow from **£8.3bn** in 2022 to **£34.1bn** by 2032

Source: Spherical Insights

DNA-Driven Drinks

As a self-governance mindset takes hold and always-on health technologies advance, the next stage for beverage brands will be to seamlessly integrate with personal health, supporting consumer needs at a molecular level.

Brands will act as daily wellness partners, using DNA, epigenetics and metagenomics to integrate personalised nutrition into the agentic AI shopping experience.

The global personalised nutrition market is projected to grow from £8.3bn ($11.2bn, €9.5bn) in 2022 to £34.1bn ($45.9bn, €39.1bn) by 2032, according to Spherical Insights, reflecting rising consumer demand for science-driven functional beverages.

Swiss food corporation Nestlé launched protein shots to help the body's GLP-1 production, while French food giant Danone's Oikos yoghurt drink is aimed at helping GLP-1 drug users to build and maintain muscle mass. In 2022, Japan's Megmilk Snow brand produced memory-care beverages with β-lactolin to provide cognitive support for its ageing population. In 2025, Japan's Meiji released a functional milk beverage to enhance vision.

Alix Cherowbrier speculates: 'Are we going to be treating our bodies the way we treat computers? We'll hack our bodies to function better… waking up, taking a 'restart' dose and continuously fine-tuning our health with edible liquids.'

Drinks brands will partner with science and technology to enable proactive health management through pre-emptive nutrition replenishment monitors.

In the years ahead, wearables and micro-dose liquids will guide optimisation, while futurist Ray Kurzweil predicts that future innovations such as implantable nanobots could deliver molecularly engineered compounds on demand, turning every beverage into precise, personalised fuel in the quest for human longevity.

The Altered State

In the coming decade, beverages will evolve as tools for human exploration, offering pathways to new emotional, sensory and cognitive states. Consumers will seek drinks that expand mood, perception and focus, reflecting a broader desire to explore the edges of human potential.

Alix Cherowbrier hypothesises: 'People want drinks that take them into a world… engaging all five senses to heighten emotion.'

As discussed in The Future Laboratory's The Synthocene Era macrotrend report, the rise of the Human+ – augmented humans shaped by bionic innovation – signals a growing appetite for enhancement. This fascination is evident in the controversial Enhanced Games, which reflect the normalisation of heightened abilities, and is echoed in everyday gym-goers micro-dosing psychedelics to boost focus and workouts (source: Dazed).

Consequently, the psychedelics market is projected to grow from £1.8bn ($2.5bn, €2.1bn) in 2022 to £3.8bn ($5.1bn, €4.3bn) by 2032, at a CAGR of 7.6 % (source: Pharmiweb).

Futuristic bars such as London's Fitz's Bar is pioneering a synaesthesia cocktail menu blending science, craft and narrative. In the future, the desire to feel 'peak experiences' will increase.

Today, consumers feel socially disconnected and nihilistic. Emerging enhancements will let them experience emotions more viscerally, with beverages facilitating mass social events that evoke a sense of shared transcendence, euphoria and collectivism.



Spectrum by Fitz's Bar at Kimpton Fitzroy London, UK

'People want drinks that take them into a world… engaging all five senses to heighten emotion'

Alix Cherowbrier, creative strategy director, Bompas & Parr

Strategic Implications

Beverages are evolving into daily tools for health, ritual and connection. Brands that blend personalised, circadian-aligned wellness drinks with visually striking experiences will drive culturally resonant engagement



Future Château, UK

Strategic Actions

Craft the cult favourite

Small-batch, limited-edition drinks aren’t new, but co-creation and storytelling elevate them, driving scarcity, status and appeal for ethically minded, premium consumers seeking authenticity and participation.



Tea House Senkutsu at Aman Kyoto, Japan

Prove your promises

Win trust by investing in clean labels, full ingredient transparency, credible sourcing, safety assurance and lab-tested, measurable benefits that address rising scepticism about health claims.



Nowadays, US

Gamified hydration

Gamify hydration through sachets, gummies, edible drops, pouches and patches. The strategy is to turn nutrition intake into an interactive, habit-forming ritual designed for virality and joy.



No Normal Coffee, Switzerland

Thought-starters

Branded belonging

Think about your engagement strategy – could your brand partner with cafés or create unique events like coffee raves, running clubs or tea ceremonies to integrate participatory social rituals into your consumers' lifestyles?



Coffee shop pop-up by Ikea and Lab54, London, UK

Flavours of you

Given the growing importance of identity signalling, which celebrities or purpose-driven creators could your brand partner with to develop or promote products that resonate with niche communities?



Charli Xcx for Poppi, US

Sip, sleep, repeat

How could your brand build an omni-channel beverage lifestyle across drive-through, subscription, venues and social commerce, offering dual AM/PM drinks, while driving habit, loyalty and recurring revenue?



AGZ by AG1, US

Related Macrotrends

2023

Longevity Lifestyles

Longevity proposes that ageing should no longer be considered as a steady decline. Businesses can use it to create products that redefine how people take care of themselves.



AI imagery by The Future Laboratory, UK

2024

Functional Feasting

As we move past the ‘free from’ era, consumers are increasingly favouring products that do more with less, bringing flavour and fun back into functional nutrition.



Single & Fat, US

2025

Culture-coded Retail

Digital commerce may offer consumers convenience, but a new generation of in-person retail experiences energised by cultural relevance and built on brand community is luring them back into the store.



Glossier and Random Studio, France

2025

New Codes of Value

In this new era of scarcity, richness is expressed through rituals, and abundance is found in regenerative pursuits and deeper connections. New codes of value are emerging around connection, care and human flourishing.



Wise branding by Ragged Edge, UK

Strategic Worksheets

This strategic worksheet is to help you apply this macrotrend to your business



Non is a non-alcoholic wine brand that treats drinking as a sensory and cultural experience, blending botanicals, spices and fermented ingredients to create complex, food-led drinks, UK

Prioritisation

Consider the following:

Which human need is most relevant to your brand/business?

Attainment | Belonging | Curiosity | Identity | Purpose | Security | Fulfilment

Which driver will have the most impact on your brand/business?

Micro-globalisation | Fragmenting Societies | Accelerating Technologies | Evolving Demographics | Climate Change & Resource Scarcity | Urbanising World



Influence

Consider the following:

How will this trend affect how you fulfil that need?

What impact could these drivers have on the business?

Select two insights that feel most relevant to your brand/business:

How do these insights align with your brand's trajectory?

How could you apply these insights to your business?

Which foresight scenario is your company least prepared for?

What is most surprising about this foresight scenario?



Consider how this macrotrend could affect the following pillars of your brand:





01 Culture

What cultural conversations are emerging and who are the tastemakers?

How do we add value to culture?

What will our consumers pay more for in the future?

02 Category

What's our greatest opportunity?

How is the competition evolving?

How can we differentiate?

From left to right: Tea House Senkutsu at Aman Kyoto, Japan Non, UK

Consider how this macrotrend could affect the following pillars of your brand:



03 Consumer

What's our greatest opportunity?

How is the competition evolving?

How can we differentiate?



04 Business

What are our biggest challenges?

What part of the value chain will add the most and least value?

What are the strengths of the brand in this future?

From left to right: No Normal Coffee, Switzerland; Non, UK

Planning

YEAR 1

Over the next 12 months, how will this macrotrend affect your team?

YEAR 3

In three years, how will this macrotrend change the brand?

YEAR 5

In five years, how will this macrotrend change the business?

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AI imagery by The Future Laboratory

Rebranding Sustainability

How to reframe sustainability through the lens of brand strategy. If sustainability were a product, how would you rebrand it? What would you keep? What would you kill?



Feels like UGG. Photography by Samuel Bradley, US

Gen Z: Global Youth Atlas

In this exclusive report, The Future Laboratory travels from Brazil to South Korea, and Kenya to India, to analyse what local Gen Z think, need and dream of.



AI imagery by The Future Laboratory, UK

Future Forecast 2026

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