

A group of people at an outdoor event, possibly a festival or fair, are shown holding various drinks. In the foreground, a woman holds a tall glass of beer with a lime wedge on the rim. Next to her, another woman holds a glass of water with ice, a lime wedge, and a sprig of mint. In the background, a man with a beard and sunglasses is smiling. The scene is bright and sunny, suggesting a warm day.

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Non-Alcoholic Beverage Trends

A look at the trends influencing beverage innovation.

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Introduction

North American soft drink volumes will continue to experience sharp declines in 2025. This is partly due to ongoing concerns about the rising cost of living. However, people are demonstrating a willingness to splurge on beverages with tangible health and wellness benefits, including prebiotic sodas, performance energy drinks, and relaxation mocktails. Brands must appeal to consumers with compelling functional and emotional benefits that add value.

This report explores trends non-alcoholic beverage companies can leverage to win over value-seeking consumers.

**The brands mentioned in this report are trademarks of their respective owners. Inclusion of these brands in this report is not meant to imply an association with or endorsement from the respective trademark owners.*

Redefining Hydration

Water has always had a strong association with health and wellness, but it is taking on new importance as consumers re-think the role of hydration. Drinking water has become about more than staying hydrated; today's consumers see it as a way to help with weight management, skin and hair benefits, fending off illness, and more. Social media is playing a role in this trend, with #watertok providing recipes and product information to help people find ways to increase their water intake. Brands have an opportunity to introduce enhanced water beverages with energy and mood-boosting qualities, improved hydration and electrolyte replenishment, beauty benefits, and more, positioning these beverages as a valuable substitute for other soft drinks.

Enhanced water's volume growth rate is expected to reach almost 7% over the years 2023–28. (GlobalData)

When it comes to packaging, convenience is key. Pack formats that offer portability – like spill-proof, lightweight, and smaller formats – can seamlessly integrate into consumers' busy lifestyles. Concentrates that can be added to tap or bottled water have become a dynamic category in soft drinks - partly because of their affordability and versatility – but also due to innovation and expansion into products with functional benefits like hydration and energy. Studio One Eleven® created custom packaging for Stur liquid water enhancers. The fruit-inspired bottle speaks to the brand's purity, flavor, and fruit-extract origins. The unique package stands out immediately from a field of competitors in the increasingly crowded water enhancer space.

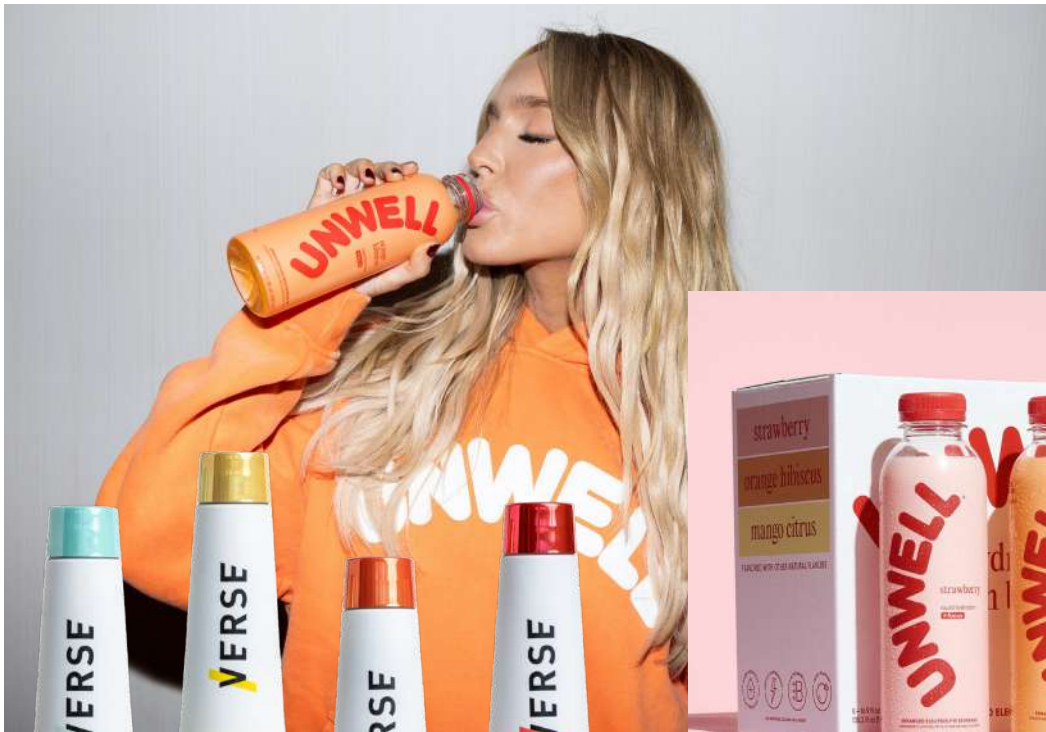


Aspirational Lifestyles

According to GlobalData, “Consumers increasingly view hydration as a lifestyle statement, blending health benefits with aspirational living.” Think about the popularity of Stanley Cups and other refillable water bottles that have become like an accessory for younger generations. Soft drink brands are partnering with influencers and pop culture icons to create aspirational products and drive consumer engagement. Euromonitor notes, “The power of celebrity backing has been well established in the alcohol industry and can potentially translate to the same sort of success with adult soft drinks.” Popular podcaster Alexandra Cooper recently launched Unwell Hydration, a beverage that provides rapid hydration and focus.

“Over half of Generations Y and Z are likely to purchase a product endorsed by celebrities or recommended on social media.” (GlobalData)

Aesthetically appealing packaging is key to communicating a lifestyle-focused positioning. Custom pack forms, sleek silhouettes, and attractive label graphics appeal to consumers looking for aspirational products. Studio One Eleven created custom packaging for Verse, a line of ultra-premium, health-enhancing social beverages that can be consumed alongside alcohol as a mixer or on their own as euphoric mocktails. The specially decorated glass bottle has a conical silhouette with a diagonal V-shaped rib pattern on the heel, inspired by the palm trees in the company’s vibrant hometown of Miami and a nod to the brand name. The bottle combines white – which speaks to the brand’s health positioning – with vibrant colors that evoke flavor.



Emotional Wellness

While the non-alcoholic beverage market is declining as a whole, one of the few growth areas includes non-alcoholic “relaxation” mocktails. According to Euromonitor, “nootropic / enhanced mental performance” was one of the top five growing health claims between 2019 and 2024. Today’s consumers are focused on holistic health and self-care, prioritizing mental health and emotional wellness. Economic uncertainty, global unrest, and increasingly busy lifestyles have led to elevated stress levels, and people want products that address concerns around anxiety, worry, and sleeplessness. Also, as consumers look to cut back on alcohol consumption, there are opportunities for non-alcoholic beverages that offer relaxation benefits typically associated with alcohol.

A third of consumers globally are highly driven to purchase relaxation and mood-enhancing products. (GlobalData)

Minimalist design can feel calm and promote a sense of tranquility. The use of white feels clean and simple and supports a healthy positioning. Packaging should also clearly communicate wellness benefits, with claims and imagery that speak to the mood-enhancing and/or relaxation properties to educate and attract health-conscious buyers. Studio One Eleven helped the Cruise B Happy brand tell their story of free-spirited enjoyment with updated branding and unique packaging graphics. Whimsical illustrations speak to the brand’s sense of freedom and relaxation.





Channel Changes

The retail landscape for non-alcoholic beverages is becoming increasingly complex as consumers are more budget-conscious, consumption habits change, demographics evolve, and technology allows for new innovations. According to Euromonitor, “Within retail, warehouse clubs in the US have seen strong growth, while discount grocery banners (such as Aldi or Lidl) and other value-focused chains have gained share over the last three years.” They add, “Technology is also enabling a new wave of high-tech, interactive and cash-free vending options in retail and seamless digital meal delivery in foodservice, providing opportunity for on-demand, impulse soft drinks.”

Annual U.S. retail e-commerce sales exceeded \$1.1 trillion in 2023 — a 7.6% increase over the prior year. – US Census



Soft drink brands benefit from the broad variety of packaging sizes and configurations available. Package sizes with competitive pricing models – including smaller sizes and value packs - can build long-term loyalty with cost-conscious consumers. Berlin Packaging has a global network of suppliers and thousands of components available, allowing us to find the perfect packaging solution for any non-alcoholic beverage, from carbonates to juices to energy and sports drinks. We also have e-commerce expertise and secondary packaging design capabilities to meet all our customers’ packaging needs for any retail channel or point-of-sale experience.

We Believe Anything Is Possible[®]

With over 100 years in the packaging industry, more than 2,000 packaging professionals and a global network of suppliers and warehouses, we offer 50,000+ SKUs of plastic, glass, and metal containers, closures, and dispensing systems across all markets for customers just like you.

Our Business Model

Berlin Packaging combines the best elements of manufacturing, distribution and logistics, and value-added service providers to deliver cost-effective packaging solutions to our customers. Our mission is to improve our customers' net income through packaging products and services. We are the world's largest Hybrid Packaging Supplier[®].



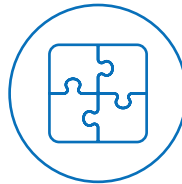
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