



# A thirst for healthier drinks

The evolving market  
for adult-oriented,  
non-alcoholic beverages

February 2024

# Non-alcoholic, adult-oriented beverages – a growing market

Consumers are increasingly aware of the importance of a healthy lifestyle, with 64% now taking a proactive approach to their long-term wellness.<sup>1</sup> This is driving a shift away from alcohol and towards beverages that support not just hydration but specific areas of physical and mental wellbeing.<sup>2</sup>

The non-alcoholic beverages category includes all alcohol-free drinks, such as water, tea, coffee, juices, smoothies, sodas, and sports/energy drinks. Global market revenue in 2023 was estimated at nearly USD 1.5 trillion, which is expected to grow by 4.7% CAGR between 2023 and 2027.<sup>3</sup>

Beverages are an ideal vehicle for wellness benefits. Formulation is often straightforward, and they offer a convenient fit into consumers' daily lives – after all, everyone needs to drink. Furthermore, 89% of global consumers are interested in using functional foods and drinks instead of capsules and tablets to improve their health.<sup>4</sup>



# 64%

of consumers are now taking a **proactive approach** to their long-term wellness

## New Prinova research

To offer new insights into this fast-evolving space, Prinova commissioned a survey of 1,277 consumers in five of Europe's largest beverage markets – France, Germany, Italy, Spain, and the UK.<sup>5</sup>

All were physically active (exercising at least twice a week). Additional quantitative and qualitative research was conducted into trends within the functional health market.<sup>6</sup> This spanned retail, foodservice, and social media across key geographies of Prinova's operation, as well as other influential territories for health.

This report looks at how factors such as age, sex, and nationality drive the purchase and use of adult-oriented, non-alcoholic beverages, exploring current market trends and highlighting opportunities for product innovation.

# The shift away from alcohol

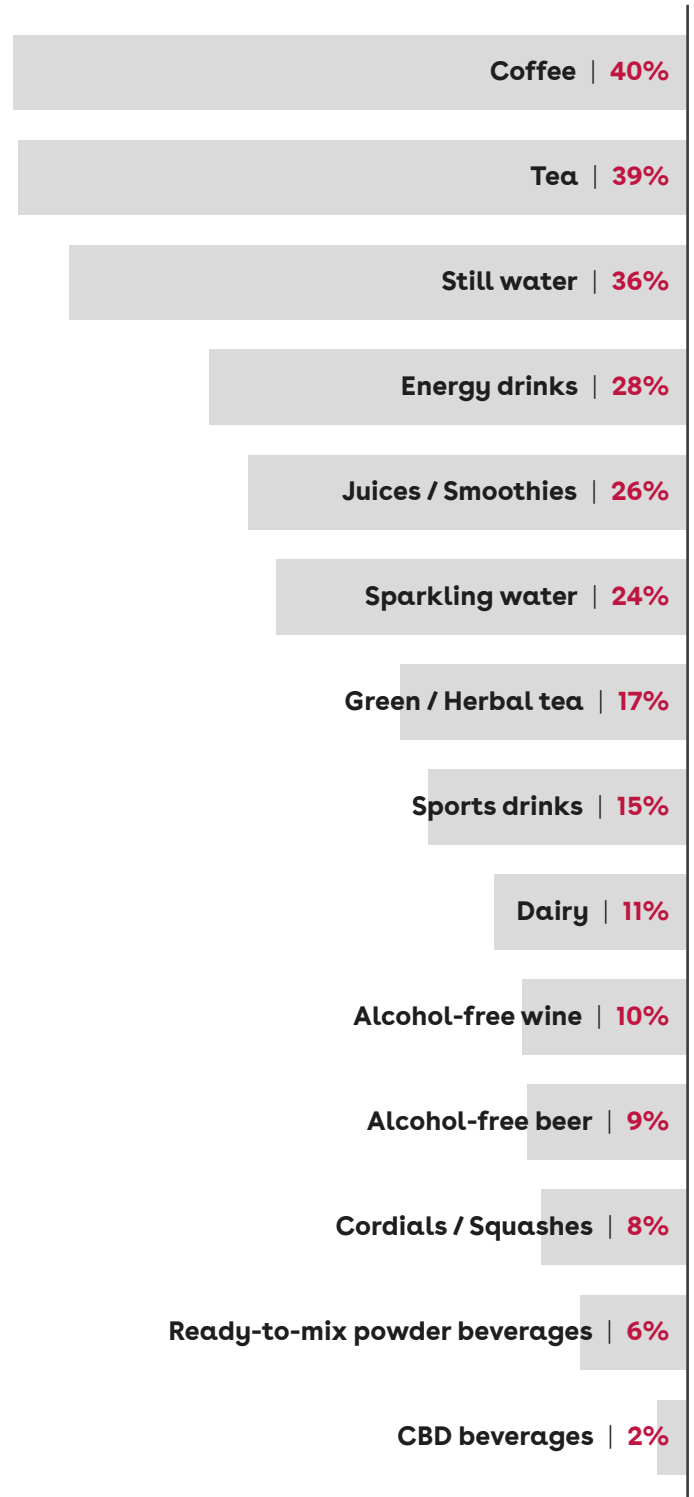
Large numbers of consumers are re-evaluating their relationship with alcohol, whether embracing the “sober-curious” trend or simply being more willing to moderate their intake – think “damp” rather than “dry”. This was reflected in our survey, which found that nearly half of respondents have decreased their alcohol intake over the past three years, with just 15% reporting drinking more.

It also indicated some clear demographic differences. Consumers in Generation Z, for example, were significantly more inclined to be either teetotal or to have increased their alcohol intake. Those aged 25-34 were most likely to be drinking less, while 55-64-year-olds were more likely to be heavy drinkers (consuming 15 or more units per week). Germany had the highest number of consumers who would be teetotal, while the UK had the highest proportion of consumers who have increased their alcohol intake, being the heaviest drinkers. Perhaps not surprisingly, health-forward consumers who exercised daily were more likely to be teetotal than less active respondents.

The most common reasons for reducing alcohol consumption were general health concerns (particularly for consumers in Spain and the UK) and the desire to lose weight (particularly in France and Spain), and for the most frequent exercisers. For men, another key factor was the fear of alcohol affecting their sporting performance, while women were more likely to say they preferred the taste of other drinks. Financial worries were also key factors for British and French consumers.

Consumers drinking less alcohol are increasing their consumption of other beverages, with coffee the top choice overall, tea a close second, and still water third. Women were significantly more likely than men to have increased their tea consumption, while men were drinking more energy and sports beverages.

## What are consumers drinking instead?



Other key differences by market were:

- Tea was the preferred beverage for French and German consumers to turn to.
- Consumers in the UK cited coffee as their number-one alternative, and were the most likely to increase their consumption of sports drinks and alcohol-free wine.
- Spanish and Italian consumers preferred still water as an alcohol substitute.
- Cordials and squashes, alcohol-free beer, and CBD beverages were more often chosen by Spanish consumers.
- In France, sparkling water, energy drinks, juices, and smoothies were highly popular alternatives to alcohol.
- German consumers choose dairy drinks marginally more than other nationalities.

Over half of respondents said they would reduce their alcohol consumption if a wider range of healthy beverages were available. This was particularly the case for Millennials, Italian consumers and those who exercised more than twice a week. Most resistant to the suggestion of lower alcohol intake were UK consumers and those aged 55-64.

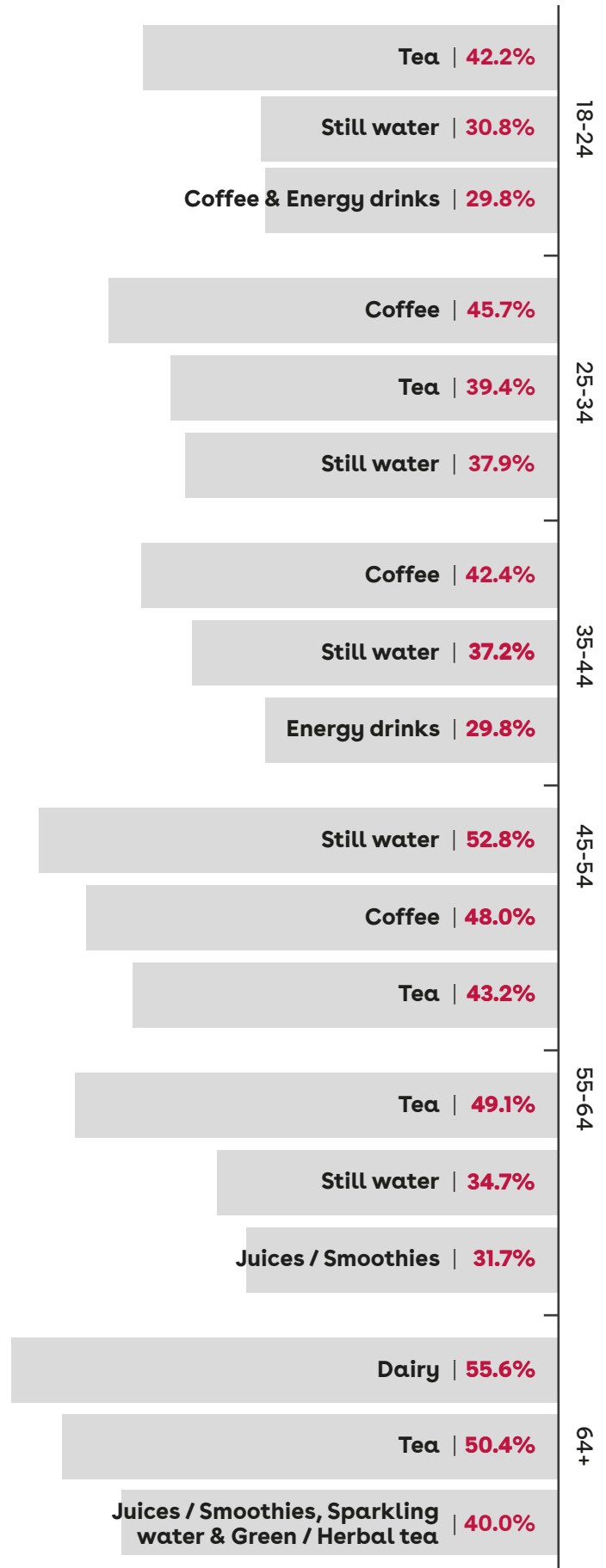
**>50%**



of respondents said they would **reduce their alcohol consumption** if a wider range of **healthy beverages** were available.

Significant variation by age group was also noticeable. Respondents over the age of 65 were five times more likely than average to have increased their consumption of dairy beverages. Alcohol-free beer was significantly more popular among the older age groups (45+), and least popular with Gen Z. Alcohol-free wine was most chosen by those aged 55 and over, and least chosen by respondents aged 45-54.

**Ranking the top three most popular drinks by age group:**



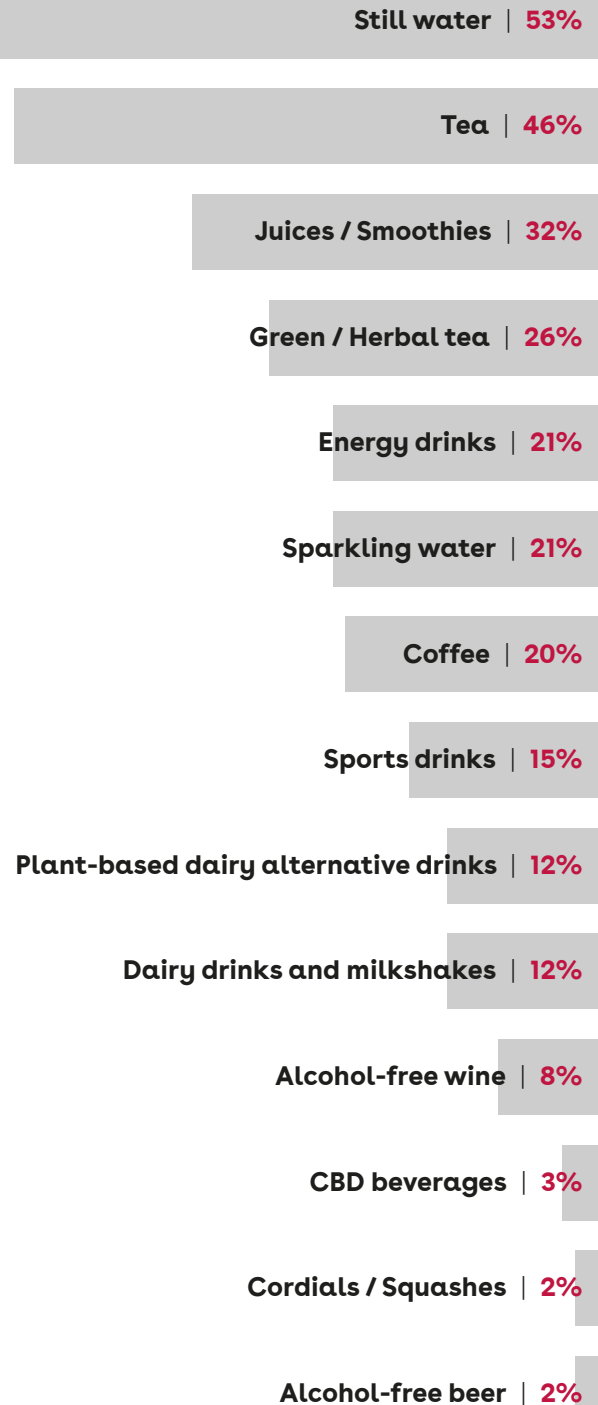
# Which beverages are seen as particularly healthy?

The beverages most associated overall with health benefits were still water (especially among Spanish respondents), tea (most notably with German and French consumers), and juices and smoothies (particularly with Italian and UK consumers). Herbal and green teas were most strongly regarded as healthy by respondents in the UK and Spain, while Italians were more inclined to associate energy drinks with health.

Men were more likely to associate sparkling water, coffee, energy drinks, alcohol-free beer and sports drinks with health benefits, while women cited still water, juices, smoothies and herbal or green tea.

Still water was most strongly linked to health benefits by those aged 55-64, tea and sparkling water by those aged 65 and over, and juices and smoothies by 45-54-year-olds. Interestingly, twice as many consumers aged 55+ perceived plant-based dairy alternatives as healthy compared to Gen Z.

## Ranking Perceived Healthiness Of Beverages





## AlphaTea™ – The natural way to relax

With consumers increasingly seeking benefits for cognitive and mental health, AlphaTea™ offers a 100% natural solution for functional beverages. Derived from green tea extract (Camellia sinensis) using advanced processing techniques, it achieves one of the highest potencies of L-theanine (up to 40%). Studies have shown that L-theanine contributes to a soothing effect, helps support natural sleep and relaxation, and promotes concentration and reaction time.

- Colourless in use
- Excellent solubility
- Suitable for high acid conditions
- Ideal for a wide range of beverage applications

### Beverage concept: Pina Colada Body Boost

A vegan recovery beverage made with natural caffeine and AlphaTea™, a pairing which has been shown to have positive effects on cognition.



### Chill Out Chocolate Molten Chocolate Flavour

Time to relax with this delicious plant-based recovery hot chocolate. This indulgent drink is only 63 kcal, but a whopping 10 g of protein, per serve.

This drink is also fortified with 8 active ingredients aimed to improve recovery and allow you to unwind. The star ingredient is AlphaTea™, a branded L-Theanine sourced from Green Tea Extract, which is known to reduce stress and anxiety levels.



### Body Boost Drink Pina Colada Flavour

Our vegan recovery beverage helps restore hydration, balance, and function to the body. With a mixture of 22 active ingredients, this includes AlphaTea™, a branded L-Theanine sourced from Green Tea Extract. AlphaTea™ helps to reduce stress and anxiety levels and is renowned for having a positive effect on cognition when paired with caffeine.

With added Cococin® Coconut Water Powder, Aquamin® Calcium and Magnesium, and minerals.



### Beverage concept: Chill Out Chocolate

An indulgent, high-protein, plant-based hot chocolate drink featuring AlphaTea™ to reduce anxiety and stress.



# Trending ingredients for healthy beverages

When asked which ingredients they most looked for in healthy beverages, nearly two-thirds of our survey respondents chose vitamins, and almost half chose minerals, which were particularly popular in Italy.

Men were keener on amino acids and glucose than women, while women expressed a stronger preference for vitamins, fruit, antioxidants, and collagen in their health drinks. Caffeine was most popular with the youngest age group, while older people (55+) were more likely to seek omega-3s. Interestingly, on-trend CBD did not make much of an impression on any of our respondents.

## Top beverage ingredients sought by consumers:



## Prinova: leading the market in vitamins, minerals, premixes, and market-ready blends

As the global leader in vitamins and derivatives, Prinova can help you create beverages with premium micronutrients. We have the world's largest inventory of food-grade single vitamins, and we are the leading supplier of vitamins B and C. We are also experts in superior custom vitamin and mineral premixes and market-ready blends to incorporate amino acids, botanicals, functional ingredients, sweeteners, and more.

Our ingredients are formulated to ensure stability, tolerate heat, eliminate undesirable flavours and odours, and contain the right overages to account for processing and shelf-life conditions. They ensure premium product performance and manufacturing efficiency, enabling you to simplify your supply chain and accelerate speed to market for a wide range of high-performing beverage applications.

## Plant-based protein – the “healthy me, healthy planet” choice

Protein is no longer just the preserve of gym-goers, but gaining wider attention for overall wellness, including promoting satiety and brain health. As people become more eco-conscious, interest in plant-based protein is growing at pace as part of a wider “healthy me, healthy planet” trend. Reflecting this, plant protein was in the top three ingredients our survey respondents sought in healthy beverages, enjoying the greatest popularity among the oldest and youngest age groups, and with physically active consumers. This trend ties in with the emergence of sustainability as another key purchase driver for consumers, particularly in Italy, the UK, and Germany.

## Solutions for plant-based beverages

Milk alternatives have played a significant role in the growth of the plant-based beverages market. With texture and taste identified as key factors in this category, we offer a wide range of ingredients to ensure a homogeneous emulsion and full yet light mouthfeel, along with the smoothness and creaminess that consumers demand. Our plant-based proteins deliver consistent performance and are always sourced from secure supply chains offering full traceability.

In order to meet vegans' nutritional needs, we have also developed nutrient-rich premixes for dairy replacement products. They contain essential vitamins and can be adapted to include additional functional ingredients, such as probiotics and calcium, as well as flavourings. Our portfolio also includes minerals from marine sources, including our branded Aquamin range.



### Aquamin – Bioactive marine minerals for healthy beverages

Aquamin is a range of plant-based, clean-label, marine multi-mineral-complex products, including calcium, magnesium, and 72 other trace marine minerals. It's supported by more than 40 peer-reviewed scientific publications, with beneficial effects for cardiovascular, bone, muscle, and digestive health. Aquamin is available in fully soluble and heat-stable grades that are ideal for beverages, suitable at a wide pH range and colourless in use.





# CLEAN CREAM®

## Clean Cream® - Vegan creamer

Clean Cream® is a vegan, clean-label cream powder that improves the taste and texture of plant-based products. It adds a dairy-like taste and superb mouthfeel without the use of dairy.

- Vegan, non-GMO ingredient
- Sugar-free, keto-friendly formulation
- Non-allergenic
- Highly soluble – ideal for beverages such as meal-replacement shakes

Beverage concept:

### White Chocolate Matcha High Protein Drink Powder

Made from pea and fava bean protein isolates, providing 22 g of plant-based protein per serving, with antioxidant matcha green tea, and Clean Cream® to ensure a smooth taste and texture.

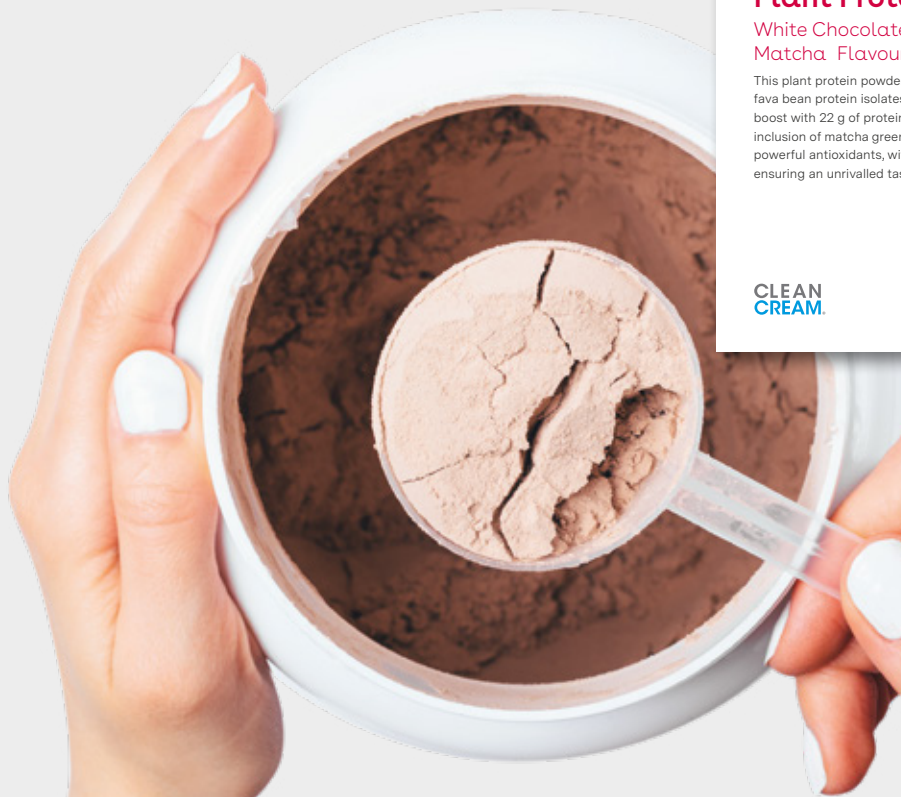
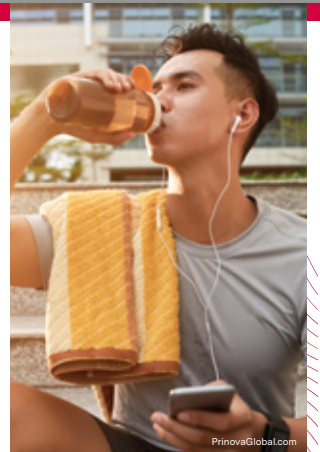
**Prinova**  
NAGASE Group

### Plant Protein

White Chocolate  
Matcha Flavour

This plant protein powder is a blend of pea and fava bean protein isolates providing a high protein boost with 22 g of protein per serving. The inclusion of matcha green tea powder provides powerful antioxidants, with Clean Cream® ensuring an unrivalled taste and texture.

CLEAN  
CREAM.



# EAAAlpha™

## EAAAlpha™ - Plant-based amino acid innovation

EAAAlpha™ is a patented, balanced blend of nine essential amino acids (EAAs) with arginine, providing an optimal ratio for muscle protein synthesis. This has benefits for maintaining muscle function as people age. Backed by 26 clinical studies, it's 32 times more effective than branched-chain amino acids (BCAAs) and three times more efficient than whey protein for stimulating muscle growth.<sup>7</sup>

- Cost-effective, vegan, non-GMO formulation
- Easier to digest than whey protein
- Efficient at doses of less than 4 g



### Boomer Boost Drink Yuzu & Ginger Flavour

EAAAlpha™ is a full spectrum, essential amino acid matrix designed to help prevent the decline of muscle function as people age.

Fortified with eight added nutrients, this great-tasting drink includes the clinically researched ingredients Aquamin®, Curcumin C3 Reduct® and BioPerine®. These proven ingredients support the common changes as you age, such as loss of bone density, inflammation, and cognition.



Beverage concept:  
Ginger & Yuzu  
Healthy Ageing

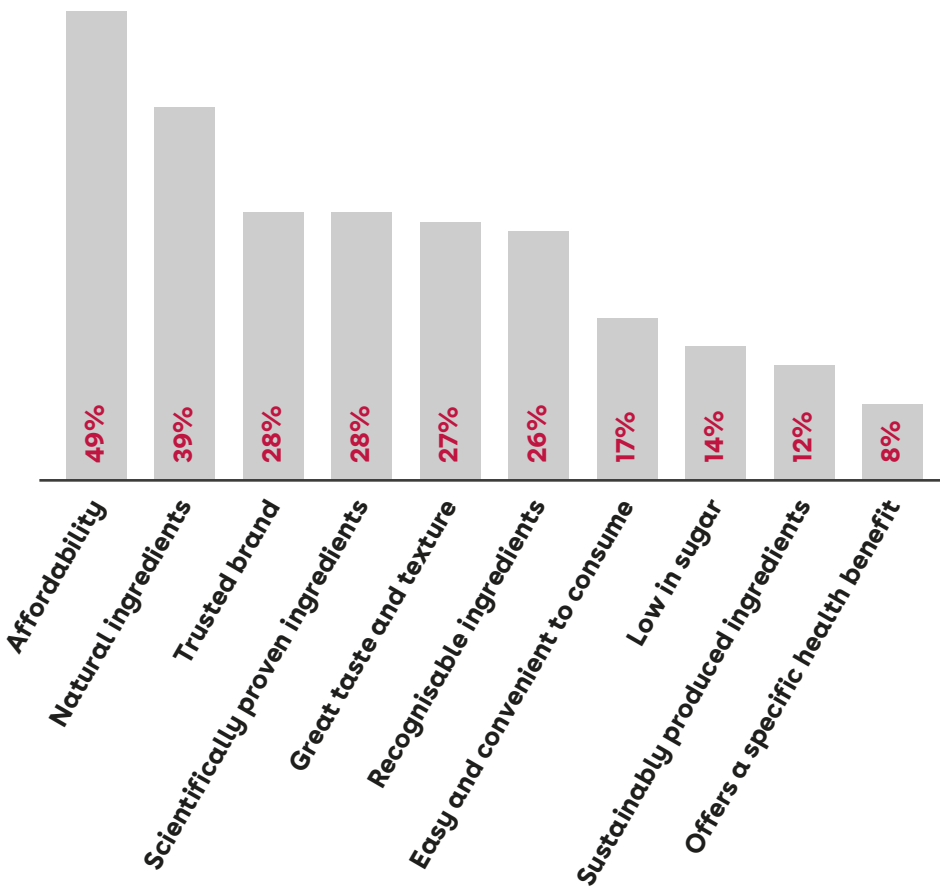
Made with EAAAlpha™ and the clinically researched ingredients Aquamin, Curcumin C3 Reduct®, and BioPerine®, which help to control inflammatory responses within the body.

# Key purchase drivers: affordability, naturality, trust

Given the ongoing cost-of-living crisis, it's little wonder that affordability was the main concern for nearly half of all consumers in our survey, particularly those in France and the UK, and with Gen Z respondents. Naturality emerged as a more positive factor influencing purchases, with consumers increasingly looking to improve their diets in the most natural way possible. This "real food" trend was especially noticeable in French consumers and those aged 65+.

The power of the trusted brand continues to win over consumers, bolstering credibility and perceptions of efficacy, and proved to be of particular importance for men and for consumers in the UK and Italy. Scientifically backed ingredients – a key pillar for building trust in a brand – emerged as a significant factor for Spanish consumers and the 35-44 age group. Beverage taste and texture were also strong purchase drivers, particularly for women.

## Top ten purchase drivers for healthy beverage consumers



### Harness the power of innovative brands

Branded ingredients can help you stay ahead of consumer trends and create products that stand out. We are a leading supplier of innovative branded ingredients, which are the result of exclusive partnerships and best-in-class scientific research. These include:



- PlantGuard™ – plant-based, natural antioxidant solutions to preserve shelf life, colour, and flavour



- BioPerine® – a black pepper fruit extract that enhances nutrient bioavailability



- Curcumin C3 Reduct – a colourless and tasteless metabolite of curcumin with strong anti-oxidant and anti-inflammatory activity

Offering excellent value, branded ingredients can give you the edge in new product development. We can coordinate your R&D, regulatory, and marketing efforts, helping you maximise the value of your product offering and reach a wider audience.

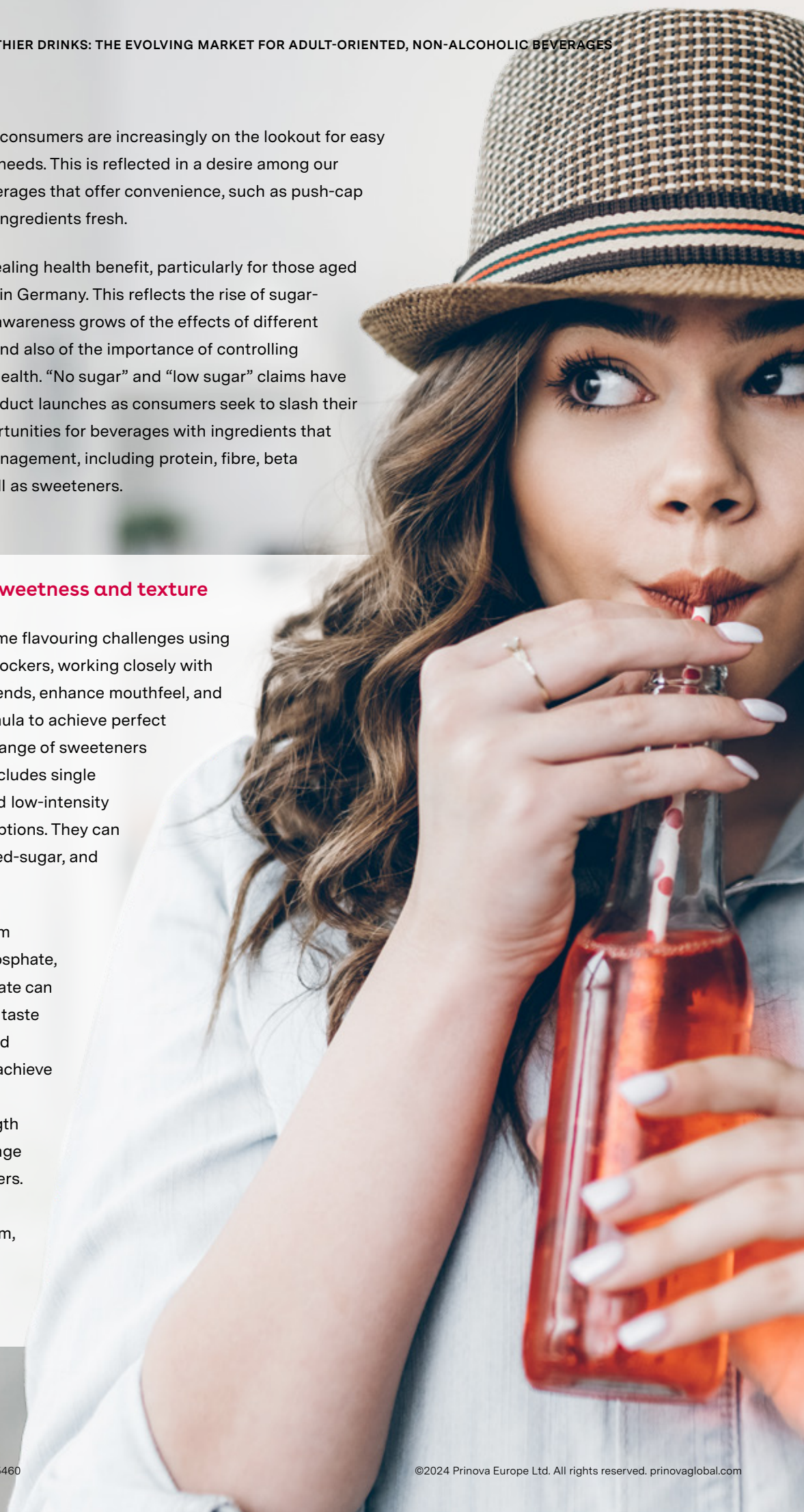
With busy modern lifestyles, consumers are increasingly on the lookout for easy ways to fulfil their wellbeing needs. This is reflected in a desire among our respondents for healthy beverages that offer convenience, such as push-cap bottles that keep functional ingredients fresh.

Low-sugar was another appealing health benefit, particularly for those aged 45 and over, and consumers in Germany. This reflects the rise of sugar-conscious consumerism, as awareness grows of the effects of different types of sugar on the body, and also of the importance of controlling blood sugar levels for good health. “No sugar” and “low sugar” claims have become common among product launches as consumers seek to slash their sugar intake, providing opportunities for beverages with ingredients that can promote blood sugar management, including protein, fibre, beta glucans, and minerals, as well as sweeteners.

### Solutions for flavour, sweetness and texture

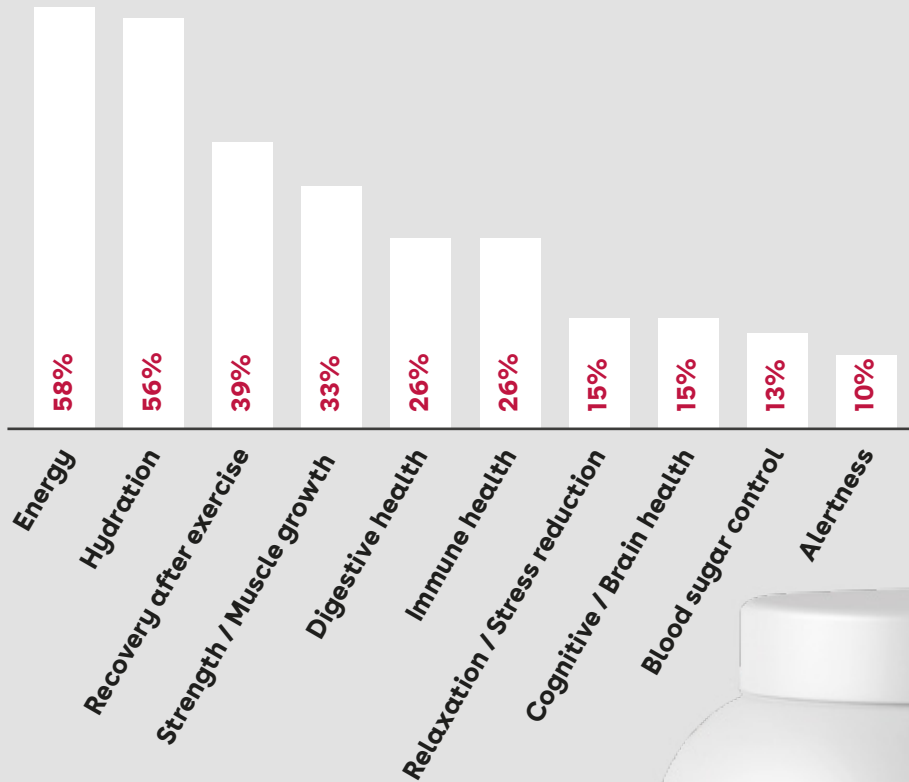
Prinova can help you overcome flavouring challenges using masking agents and bitter blockers, working closely with you to develop sweetener blends, enhance mouthfeel, and fine-tune your beverage formula to achieve perfect results. Our comprehensive range of sweeteners and sweetness enhancers includes single ingredients, blends, high- and low-intensity solutions, and plant-based options. They can be used in sugar-free, reduced-sugar, and low or zero-calorie products.

Phosphates such as dicalcium phosphate, monocalcium phosphate, and tetrasodium pyrophosphate can be used to improve beverage taste and texture, adjust acidity, and extend shelf life. To help you achieve the precise viscosity, texture, structure, colour, or gel strength you need, we offer a wide range of hydrocolloids and thickeners. These include xanthan gum, carrageenan, locust bean gum, and sodium alginate, with options for vegetarian and vegan products.



# Healthy beverage goals

## Top health benefits sought in healthy beverages



### Beverage concept: Hydrate and Replenish

A refreshing, functional hydration beverage containing electrolytes from Cococin®, a freeze-dried derivative of coconut water that has been dubbed the “natural isotonic sports drink”. In this low-carbohydrate beverage concept, the electrolytes are joined by BCAAs, B vitamins, vitamin E, and antioxidants to replenish and refuel the body.

Energy was the number-one benefit sought in healthy beverages in our survey, echoing the ongoing interest in enhancing energy levels to support busy lifestyles.<sup>1</sup> Interestingly, while caffeine is widely recognised for its energy benefits, it did not score too highly with our respondents as a desired healthy ingredient. This opens up opportunities for ingredients that support steady energy without the caffeine crash, such as B vitamins, slow-release carbohydrates like **enduracarb**®, and natural caffeine alternatives, including guarana, yerba mate, and matcha.

Hydration came a close second, and was particularly important for women. Our research also identified “water plus” as a growing trend. This elevates water beyond simple H<sub>2</sub>O to include formulations incorporating key electrolytes using natural ingredients such as coconut water, or with functional ingredients such as protein, fibre, vitamins, and minerals.



## Sports nutrition: challenges and opportunities

While only 15% of consumers surveyed selected sports drinks as beverages they most associate with health, a large proportion nevertheless highlighted exercise-related benefits as key factors in their purchase decisions. Over 50% looked for energy and hydration benefits, while nearly 40% sought help with recovery after exercise. A third of consumers, and men in particular, looked for strength and muscle growth benefits, and these were also very popular for Gen Z respondents and those in Germany and the UK.

Sports performance now also includes gaming, which is increasingly seen in the context of physical and mental endurance. Cognitive abilities are especially important, with focus, enhanced reaction times and memory all crucial. Beverages provide a convenient format for consuming ingredients during gaming sessions that support mental clarity and energy.

## Game-changing sports drink development

Partner with us to get the insight you need to meet your customers' performance, dietary, and wellness goals. With our high-quality ingredients, custom premixes, and formulation expertise, we help you create innovative sports and lifestyle nutrition products that stand out from the competition. As the world's largest seller of food-grade amino acids, we deliver a competitive edge and unmatched market expertise for ready-to-mix powder sports drinks. In the continued pursuit of improving flavour, solubility, and overall sensory characteristics, we offer a full range of micronised amino acids available individually, as a bespoke base blend to your specification, or as a fully flavoured and sweetened bulk blend.

### Beverage concept: Move, Flex & Soothe

A research-backed beverage concept specifically formulated to ease aching joints and improve recovery. It contains six powerful ingredients, including Prinoa's clinically studied Curcumin C3 Reduct<sup>®</sup>, which helps control inflammatory responses within the body, and vitamin C, which supports collagen and connective tissue formation, and helps protect cells from oxidative stress.





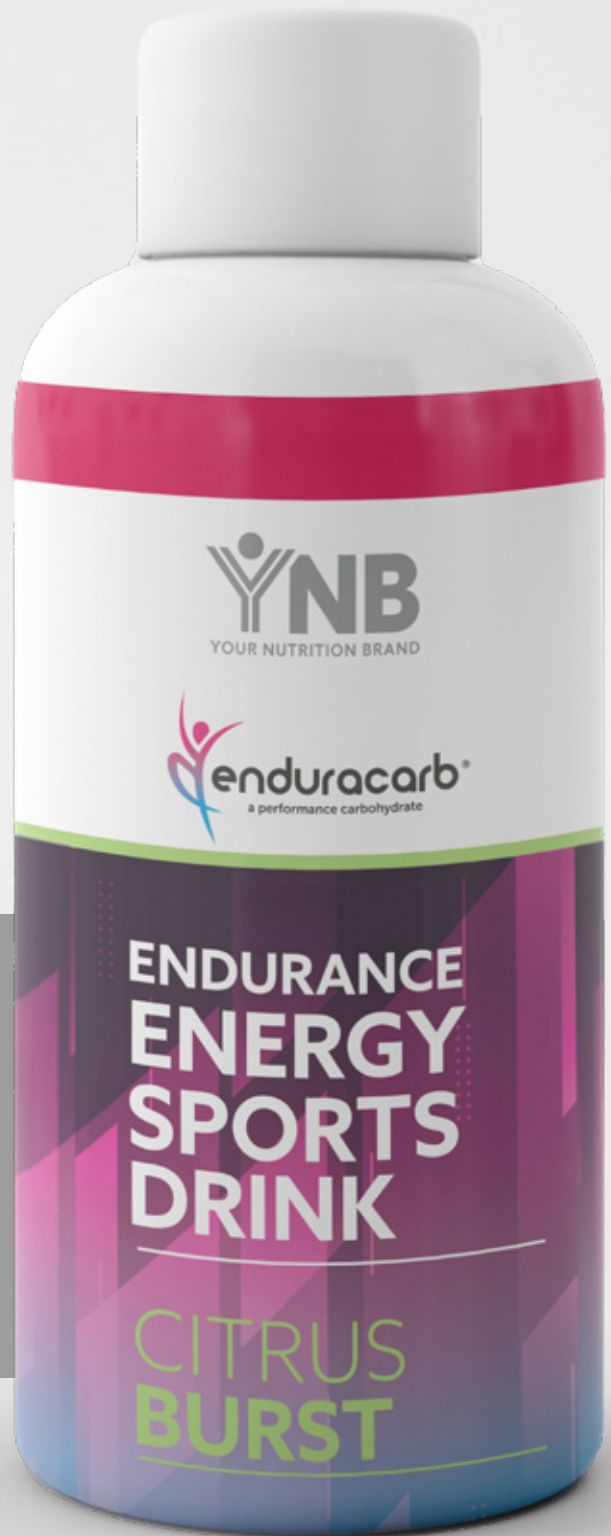
## enduracarb® – The fuel of choice for endurance

Informed Ingredient-Certified enduracarb® is a science-backed, slow-release “double sugar” which outperforms other carbohydrate sources over prolonged periods of intense exercise. Made from high-purity trehalose, enduracarb® is slowly digested and absorbed, and contributes to the maintenance of performance during endurance exercise. It’s ideal for sports nutrition beverages, including protein ready-to-drinks, gels, energy drinks, and vegetarian beverages.

- Supports hydration
- Plant-based, fructose-free, non-GMO
- Masks the bitterness of other ingredients, such as proteins
- Provides exceptional stabilisation against moisture absorption and discolouration

### Beverage concept: enduracarb® Endurance drink

enduracarb® is ideal for a range of sports nutrition beverages, including protein ready-to-drinks, gels, energy drinks, and vegetarian beverages. This beverage contains enduracarb® for the slow release of carbohydrates, as well as electrolytes. Carbohydrate-electrolyte solutions enhance the absorption of water during physical exercise.



## Immunity and digestive health benefits

The pandemic sparked huge interest in immunity, together with a growing awareness of its links with digestive health,<sup>8</sup> and this has continued as an everyday concern. Reflecting this, over a quarter of our respondents listed immune and digestive health as key health benefits they seek in beverages. Immune support was particularly important for women and for German consumers, while Spanish consumers were the most concerned with digestive health.

### Solutions for immune and digestive health beverages

Nutrition plays a crucial role in supporting immune health and digestion. Innovation in this category is occurring in applications as diverse as juices, functional waters, RTDs and energy drinks. We offer a wide range of on-trend, high quality, immune and digestive health ingredients, including:

- **DigeZyme®** – a multienzyme complex that facilitates better digestion and nutrient absorption
- **LactoSpore®** – a scientifically tested probiotic with benefits for digestion and immunity
- **Saberry®** – a broad spectrum antioxidant with antimicrobial properties
- **Selenium SeLECT®** – a safe and bioavailable form of selenium for immune support
- **ZeaLutein®** – a natural phytocomplex that can potentially help reduce oxidative stress of the immune system

With our NPD expertise and technical know-how, we can work collaboratively with you to create products that meet your consumers' wellbeing needs. Furthermore, we can help you navigate the complex regulatory challenges and support your marketing strategies to maximise the value of your offering and reach a wider audience.





## Beverages for the mind

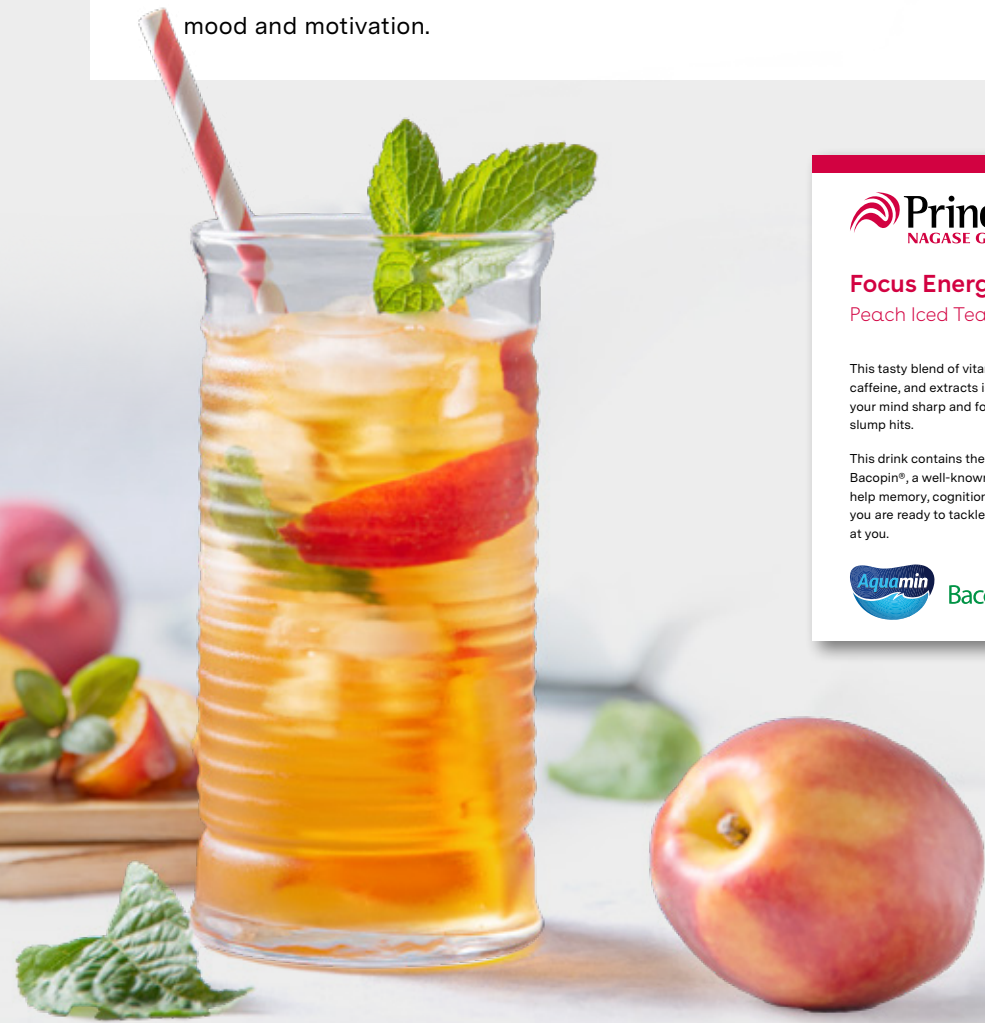
Our survey found large numbers of consumers were looking for solutions for cognitive health, relaxation and alertness, with women particularly interested in ingredients with benefits for stress reduction and relaxation. This echoes the global post-pandemic trend for supporting emotional wellness and mental wellbeing,<sup>1</sup> and the increase in functional beverage launches featuring brain or nervous system claims over the last decade.<sup>9</sup>

### The nootropic advantage

Nootropics are cognitive-enhancing ingredients that help reduce stress and fatigue, boost mood, and improve functions such as focus and memory. Beverage applications are ideal for nootropics, as they allow for more rapid digestion than food, delivering their benefits more quickly. We can supply a wide range of nootropics, including branded ingredients such as TeaCrine®, a concentrated theacrine extract which supports mood and motivation.

### Beverage concept: Focus Energy

A peach iced tea flavour beverage containing Bacopin®, an extract of Bacopa monneria – a nootropic adaptogen which studies show may help improve memory and attention. It also contains zinc, which contributes to normal cognitive function.





**Focus Energy Drink**  
Peach Iced Tea Flavour

This tasty blend of vitamins, minerals, natural caffeine, and extracts is the perfect way to keep your mind sharp and focused when that 3 pm slump hits.

This drink contains the researched backed Bacopin®, a well-known adaptogen, that could help memory, cognition, and mood, ensuring that you are ready to tackle whatever the day throws at you.





PrinovaGlobal.com

# Prinova: all the ingredients for beverage success

Whatever your beverage goals or challenges, Prinova will be with you every step of the way. As a single-source partner for beverage ingredients and industry expertise, we can support you at all stages of the development process.

- Tap into the technical, marketing, and regulatory expertise of our product development house to enhance your beverage innovation, accelerate your time to market and stay ahead of the competition.
- With our global network, local market insight, extensive ingredient portfolio, and robust supply chain, we can help you reduce the number of suppliers you work with, saving you time and money.
- Partner with us to benefit from our leading positions in sweeteners, vitamins, amino acids, preservatives, acidulants, and plant proteins, sourced in alignment with the industry's latest quality standards and ingredient science.

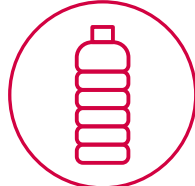
Our solutions cover all beverage applications, including:



FUNCTIONAL BEVERAGES



CARBONATED BEVERAGES



FLAVOURED WATERS



STILL DRINKS



JUICES



SYRUPS, CORDIALS, & CONCENTRATES



ENERGY DRINKS



SPORTS DRINKS



PLANT PROTEIN DRINKS



DAIRY BASED DRINKS



CIDERS



ALCOHOLIC BEVERAGES

Contact us to explore the opportunities.

[Click here](#) 

Find more information on our beverage capabilities.

[Click here](#) 

# References

---

- <sup>1</sup> FMCG Gurus, Top Ten Trends for 2023, November 2022
- <sup>2</sup> Euromonitor, 10 Global Consumer Trends 2022
- <sup>3</sup> <https://www.statista.com/outlook/cmo/non-alcoholic-drinks/worldwide>
- <sup>4</sup> FMCG Gurus Nutritional Supplements in 2022
- <sup>5</sup> Research carried out online, March-April 2023
- <sup>6</sup> The Food People, Functional Health Trends, 2023
- <sup>7</sup> Church et al, Improved muscle protein synthesis is achieved with 3.6 g of free form essential amino acid ingestion in elderly. International Society of Sports Nutrition Conference, 2019
- <sup>8</sup> FMCG Gurus, Top Ten Trends For 2022, Global Report
- <sup>9</sup> Mintel GNPD, 2021



This document does not constitute a recommendation for the purchase, use or application of the products. The data contained herein should not be considered as part of our general conditions of sale and is subject to change without prior notice. The information given in this document is based on our current knowledge and experience. It does not guarantee the suitability of the product for a specific use and does not release the company using the product from the obligation to carry out its own suitability and quality tests. Except as required by law, Prinova assumes no responsibility for the regulatory compliance of finished products in individual markets. This obligation falls exclusively on the company producing or marketing the finished product. This business-to-business communication is not intended for the end consumer.