



# **GROWTH** **SPACES** QUARTERLY

**ADVENTURES IN  
BEVERAGES**

# WELCOME TO MMR GROWTH SPACES

Welcome to Growth Spaces Quarterly, designed to inform your innovation thinking. This premier issue is dedicated to the exciting world of [beverages](#) and will almost certainly trigger some fresh ideas as you plan your next move.

Despite huge changes in the consumer environment, there is ample evidence to show that brands are launching far fewer innovations. Whilst multinationals have been wrestling with supply chain issues and cost increases, it has been left to the small and medium sized manufacturers to meet new demand spaces.

[According to Circana, SMEs are now responsible for 75% of all new products launched, contributing 68% of total value sales from new products – and reflected in the pages of this Quarterly.](#)

With economic indicators beginning to look more encouraging, and global beverages category revenue projected to deliver an annual growth rate (CAGR 2024-2029) of 10%\*, now is the time for manufacturers to bolster their portfolios and benefit from new growth spaces. In this issue we explore alcoholic and non-alcoholic sectors and showcase the products that are raising expectations for whatever comes next.

And to add clarity to flavor trends, we share results of exclusive research revealing which emerging ingredients are most likely to raise curiosity levels for your brand.

Get in touch if you need help sparking innovation spirit in your team. We offer an extended presentation on flavor trends, and a highly valuable briefing about Trend Tribe, our exclusive tool to help you prioritize your innovation investment.

So, enjoy this tour into the latest developments in liquid ingenuity!

A portrait of Andrew Wardlaw, a man with short blonde hair, smiling, wearing a black t-shirt. He is positioned in the lower right quadrant of the page, with his arms crossed. The background behind him is a dark purple circle with a starry, nebula-like pattern.

**Andrew Wardlaw**

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\*Statista, spanning alcoholic and non-alcoholic sectors.



## Growth Spaces

*Everything, everywhere.  
All at once.*

*In the ultra-dynamic world of beverages, brands are accessing all areas to keep consumers engaged – extending functionality, experimentation, and multi-sensory theatre to drive relevance in the booming experience economy. [Buddy's Chaser](#) adds electrolytes to alcohol to keep you hydrated 'no matter what'. [Sprite Chill](#) elevates refreshment by getting colder the more you sip. And [Sake Sling](#) is expanding Western palates with hitherto unknown tastes from Asia.*

*These innovations reflect an increasing desire by manufacturers to break today's low attention economy, with concepts that command the double-take, and product experiences that can excite the social media hype-cycle, notably TikTok, Instagram and Weibo.*

*However, hype can be a problem if a product experience fails to match up. This is something that [PRIME](#) is learning as some of the brand's eye-catching neon bottles find their way into bargain bins. To be fair, the product still made a lot of money!*

*With media investments generating less return, manufacturers are shifting their attention to building better product experiences – harnessing multi-sensory techniques to support highly prized mental availability. It's a move that also caters for rising YOLO (you only live once) spirit – a knock on from recent economic crisis and geo-political uncertainty, which has essentially pushed people into making the most of now, seeking out glimmers: micro-moments of joy, off-setting daily stress...*

## Growth Spaces

# Everything, everywhere. All at once.

*The YOLO economy has been credited for saving the world from deep recession. In response, manufacturers must elevate product experiences so that they bring more joy!*

*People's search for glimmers is just one example of a shift towards more intentional living, meaning more goal-directed purchasing. Brands that adapt to this new normal stand to gain most. So, ask how your product ranges can go beyond great taste and refreshment. [Poppi](#) sodas already has, ticking boxes related to cravings for nostalgia, as well as support for gut health (with probiotics) and wellness (only 25 calories).*

*Beverages with benefits meet an increasing human desire to exert a little more control in a world that feels more uncertain.*

*One intention that absolutely must be met is more sustainable consumption, with many manufacturers starting to apply the principles of a circular economy: including the elimination of waste & pollution and increasing efforts to regenerate nature as well as adopting more climate resistant ingredients. And not forgetting the drive towards inclusivity and social justice – both at home and across supply chains. Innovation has never been so complex, but at the same time, it has never been so exciting.*

*Everything, everywhere? In these pages, we share details of some of the 24 beverage trends identified for 2024. All 24 are shown overleaf!*

## Format Focus: Dry Mix Beverages.

*A monastic brewery in East Germany claims to have created the world's [first powdered beer](#). Just add water, and it will come to life, complete with foamy head and full flavor. The result promises massive savings on transport, because it can be shipped at just 10% of the usual weight!*

*Long relegated to the back of the pantry, powdered beverages make sustainable choices more accessible for eco-warriors and cash-strapped shoppers alike. Manufacturers are now playing the functionality card to persuade consumers that this format is future focused!*

*Proving once and for all that powder can be edgy, [Liquid Death](#) has expanded its product lineup with the introduction of "Death Dust" – an electrolyte drink mix that complements its still Mountain Water – available in three flavors, including Severed Lime, Mango Chainsaw, and Convicted Melon.*

*Similarly, [Psychedelic Water](#) has introduced Good Mood Mix – kava-based powder drink sticks that promote mood elevation and physically relaxing effects.*

*Illustrating the versatility of the format, [Dyma Brands](#) in the US is now selling cocktail and mocktail dry blend mixers under its Thirst Ease brand. The mixers are available in margarita, strawberry daiquiri, and piña colada flavors.*

*Powdered beverages are breaking free from their cheap and childish beginnings. Recent launches show that this format can respond to modern consumer demands for customization, portability, functionality, and sustainability.*

### **HYBRID SIPS**

*Mixing it up!  
Fused formats and  
different liquid styles.*

### **HOME BAR+**

*Elevated beverages for  
aspiring domestic  
mixologists.*

### **SMALL MEASURES**

*Moderation made simple.  
Same liquid, just less of it.*

### **FLEXIBLE ABV**

*Popular liquids in a variety of  
ABVs – for more inclusive  
drinking.*

### **LIGHTLY SWEET**

*Less sweet, less calorific  
liquids, creating more  
nuanced taste experience.*

### **SLEEP READY**

*Nocturnal sips responding to  
the raised importance of  
deep slumber.*

### **MIDPOINT POURS**

*Mid-range ABVs that bridge  
the gap between abstinence  
and abandonment.*

### **EXPERIENCE TEA**

*Sophisticated tea-based  
beverages delivering new  
tastes with a health halo.*

### **ALCOHOL SLUSHIES**

*Cocktails straight from the  
freezer, providing novelty for  
thirsty kidults everywhere.*

### **ALT NIGHT BUZZ**

*Mood boosting non-  
alcoholic sips that can  
elevate evening vibes.*

### **MOOD MAKERS**

*Adult sips infusing smart  
ingredients that shift mood.*

### **ASIA ADVANCE**

*Spirits and ingredients  
bringing Eastern mystic to  
all.*

## **24 TRENDS FOR 2024**

### **SAVORY SIPS**

*From salty beer to saline  
cocktails, beverages that  
move away from sweet.*

### **DYNAMIC HEAT**

*Multi-dimensional flavor  
experiences with heating  
and cooling sensations.*

### **SHRUB UP!**

*Healthful brews (sipping  
vinegars) that follow  
fermented food's fame.*

### **HERB ELEVATION**

*Nature-forward ingredients  
adding extra layers to iconic  
liquids with aromatic effect.*

### **CHARRED EDGE**

*An evolution of the smoky  
trends, adding even more  
depth and complexity.*

### **NEWSTALGIA**

*Formats and flavors that  
evoke bygone days and  
simpler times.*

### **PREMIUM HYDRATION**

*Beyond sport & fitness and  
suiting more everyday needs.*

### **INNER BEAUTY**

*Formulations that deepen  
self care routines, inside-out.*

### **BETTER ENERGY**

*Cleaner options containing  
natural ingredients for a  
better balance.*

### **AI BREWS**

*Liquid experiences designed  
with minimal human  
intervention.*

### **CLIMATE HEROES**

*Beverages utilizing  
ingredients & practices that  
recognize climate change.*

### **ALCOHOLIC SPORTS**

*Liquids for recreationalists –  
focused on adding fun.*

## GROWTH SPACES

# MIDPOINT POURS

Mid-range ABVs that bridge the gap between abstinence and abandonment.

Action: Explore concepts and liquids that appeal to mindful drinkers who have an aversion to loss.

Figures from IWSR have revealed that two-thirds of global consumers want to moderate their drinking. And yet volumes of non-alcoholic alternatives barely reach 2% of alcoholic liquids consumed.

Meanwhile, research for Bacardi highlights a post-pandemic shift towards earlier drinking times, which indicates opportunities for lighter choices.

Brands are starting to push into this territory, but it will take an industry-wide effort and support from retailers to realize its full potential.



### **GARAGE PROJECT** (NZ)

Introducing Four Legs Good Table Beer. Brewed to be lighter in alcohol, it's a sparkling farmhouse style ale that has been aged in oak so that it is dry, crisp and ever so slightly tart. **ABV 2.5%**



**ELEPHANT IN THE ROOM** (AUS) No & low alcohol wines have struggled to win repeat consumption, with liquids slated for inadequate performance. Now, established wine producers are expanding their most popular brands into reduced ABV territory, with great results – like this one. **ABV 6.9%**



### **SASSY** (France)

This elegant Normandy Pear Cider is crafted to be premium quality, low in calories, low in alcohol, and 100% natural. **ABV 2.5%**



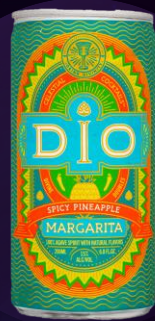
### **SMALL BEER** (UK)

British trailblazer Small Beer is building a fanbase of moderating drinkers who are impressed by its range of award-winning ales. **ABVs 2.1%-2.8%**



### **ABSOLUT COCKTAILS** (UK)

New for 2024, two ready mixed bottled cocktails! Absolut claims that its wider RTD estate is ready to overtake wine and spirits and hopes that this move will raise the bar in the quality of consumers' experience. **ABV 15%.**



### **DIO** (US)

These canned cocktails are billed as 'Herculean Strength' and are made with exotic ingredients and less than 5g of sugar per can. The range includes Spicy Pineapple Margarita, Turmeric Ginger Lemon Mule and Tahitian Vanilla Espresso Martini. **ABV 13.5%-15%**



### **NOVO FOGO** (BRAZIL)

These updated, organic Brazilian cocktails are full flavored and not too sweet. They combine freshness and deliciousness, with organic-certified ingredients that harmonize as balanced, carbonated drinks. **ABV 9%**



### **PHRESHLY** (US)

'Culturally-inspired cocktails' with premium spirits and natural ingredients handpicked from minority-owned farms. C'iddem is a rum blueberry daiquiri inspired by the flavors of West Africa. **ABV 6%**

## **GROWTH SPACES**

# **HOME BAR+**

*Elevated beverages for aspiring domestic mixologists.*

*Action: Earn premium positioning with next level flavor hits, and a focus on reduced sweetness, which is increasingly linked to better.*

*A study in 2022 found that home bars had become a priority for homeowners, ahead of spending on new kitchen ideas, home gyms, and new porches. Having mastered the basics, home bartenders are now looking to upgrade their domestic experience.*

*Moreover, the YOLO economy is pushing people to prioritize indulgence to 'boost their serotonin amid the polycrisis' (WGSN).*

*In practice, the home bar is moving beyond the basics, with elevated beverage experiences set to define the next phase in its evolution.*

*See also: [Pals Copalli Rum](#) and [Melograno](#)*

# GROWTH SPACES

## CLIMATE HEROES

Beverages utilizing ingredients & practices that recognize climate change.

Action: Future proof your portfolio by embracing a biodiverse range of ingredients.

Manufacturers are rising to the challenge to create more sustainable sips by sourcing ingredients that are more climate resistant and often benefiting soil health.

Expect the emerging generation to be much more aware of the importance of sustainable crop production, resilient supply chains, food security, environmental conservation and quality nutrition.



**BROOKLYN BREWERY** (us) The latest creation from Brooklyn is this session IPA which uses a West African 'super-grain' called Fonio, which is drought-resistant and may offer a more sustainable alternative to barley. **ABV 4.3%**



**TRASH & TREASURE** (uk) makes use of discarded pineapple and mango peel from a local fruit processor for its Tropical Rum. While its Citrus Vodka makes use of upcycled malt dust from a local brewery. **ABV 37.5%**



**ANYTIME** (us) is made from regenerative organic certified wheat grown in Hudson, New York. It maximizes cover cropping to improve soil health and adds diversity to the land. **ABV 2.5%**



**PATAGONIA** (us) has collaborated with Dogfish Head using the Kernza grain, which benefits soil health due to its deep roots and perennial nature. **ABV 5%**



## GROWTH SPACES

# The unstoppable pursuit of better.

To survive in today's highly connected and economically constrained environment, people have been forced to adopt a more competitive stance. For Gen Z, the cost of achieving traditional life milestones is often considered out of reach. Factor in the daily hit of social media, and its depiction of 'best lives' and it's easy to understand why life can feel like an eternal struggle for so many.

*Today's tech-enabled global village is conditioning consumers to seek better, with a relentless pursuit of upgrades to mind, body and performance.*

Whilst energy drinks will dominate sales of functional beverages for some time yet, higher growth potential is expected from divergent premium hydration products that support aspirations outside of sport and fitness. Similarly, sips supporting mood will expand exponentially.

Supporting manufacturers' response is the emergence of a new generation of ingredients: adaptogens that help the body resist daily stressors, and nootropics, that support mood and cognitive function.

And recent scientific revelations pertaining to the gut-brain axis have provided additional opportunities for beverage innovators to move into previously uncharted spaces related to cognitive conditions.

*Beverages supporting cognitive health and performance, gut health and related mood support, sleep, libido and even eye health will evolve quickly.*

Signaling the shift in emphasis, UK CBD brand [Trip](#) has just expanded its remit in the mood space with a range of Mindful Blends, containing mushrooms and adaptogens lion's mane, magnesium, ashwagandha and L-theanine.

There are also movements in the energy drinks sector as consumers seek out products that can support a wider range of lifestyle occasions. [KEY](#) all natural energy drinks contain pre-ketones made from fermentation, supporting the body's ability to create energy. The drink also contains green tea caffeine and stevia for sweetness and comes in three flavors.

And inspired by 'society's growing desire to step into every day with the best foot forward', [CORPSE REVIVER](#) makes meticulously crafted hydration libations that are designed to 'bring your body back to life.'

With the right frame, beverage brands stand to gain from consumers' quest to achieve their best.



## GROWTH SPACES

# PREMIUM HYDRATION

*Beyond sport & fitness and suiting more everyday needs.*

*Action: Identify more nuanced consumer segments, day-parts and life stages.*



As inclusive, active lifestyles rise, hydrating beverages will support a broader range of consumers. From partygoers seeking recovery to seniors and students in need of cognitive care, hydration products will move beyond sports and fitness to target a broader range of consumers.



Manufacturers should seek out specific consumer segments, considering athletes as well as social fitness and life stages, with customized formulas, ingredients, functionality and packaging. Innovators should go beyond electrolytes and look at collagen, adaptogens and probiotics, and from natural and plant-based sources.

### **PROGAMER** (Denmark)

Arla Foods is expanding its remit with a new hydration drink for gamers that improves energy and concentration levels. It's made with a proprietary whey protein isolate, taurine, magnesium, zinc, caffeine and vitamins A, B3, B6 & B12.

### **REFIX** (Spain)

Spotted at IFE 2024, this Coconut & Pineapple seawater hydration drink can be used as a hangover prevention or for post-workout recovery. And if this wasn't enough, the little bottle also aids digestion.

### **MARK ANTHONY BRANDS** (US)

has partnered with footballer Lionel Messi to create a new non-alcoholic, 'game-changing' hydration drink, due to be released in Summer 2024. Stay tuned!



Brands must support people who are striving towards their best selves, mitigating the effects of daily stress and anxiety, and prioritizing pleasure, healing and even celebration.

See also: [Essentia](#), [Cadence](#) and [LVL UP](#)

## GROWTH SPACES

# ASIA ADVANCE

*Spirits and ingredients bringing Eastern mystic to all.*

*Action: Respond to the more experimental consumer by offering exciting twists to familiar sips with ingredients such as Yuzu, Ume and Osmanthus.*

Asia is back in fashion, with rising interest in national and regional tastes from the region.

In the UK, the BBC's [Race Across the World](#) programme follows five competing teams making their way from Japan to Indonesia. 'Bookings for Japan are up 75%,' says James Mundy from the Inside Travel Group. The company, which specializes in cultural engagement and off-the-beaten-track locations, has seen other countries benefit. 'After Korea featured in the second show,' says Mundy, 'bookings rose by 46%.'

Meanwhile in the U.S., [latest data](#) finds 46% of Americans now have a passport, up from 30% in 2008, with Japan, Vietnam, South Korea, and the Philippines among the top destinations for Gen Z and Millennials.



### **GARAGE PROJECT** (NZ)

Yuzukoshō Salted Sour Ale includes green yuzu and chilli. It captures the essence of seasonal freshness, bursting with salty sour citrus, and delicate chilli heat. **ABV 4.3%**



### **VIDA** (Malaysia)

Steadily working its way West, this zero-calorie sparkling beverage is enveloped in the essence of Sakura cherry blossom. It claims to offer a refreshing experience... **ABV 0.0%**



### **ROKU GIN** (Japan)

This craft gin, marketed by Suntory, captures the essence of Sakura in bloom, a fleeting phenomenon that transforms Japan into a sea of color and delicate fragrances each spring. Now available in UK supermarkets. **ABV 43%**



### **SPIRITED BRANDS** (US)

Sokē is a unique blend of Junmai sake and soda. Flavors include White Peach, Lychee, Cherry Blossom, and Yuzu Ginger. **ABV 5.5%**



### **GUINEP** (US)

This Ocean Mineral Cocktail has a savory taste profile and is alcohol free. It's made with 70 deep ocean minerals and flavored with the essence of the Caribbean Guinep fruit. 'It has just the right amount of sweet with the perfect bubble texture', writes one reviewer.



### **AURA BORA** (US)

A non-alcoholic sparkling Olive Oil Martini made with juniper, yuzu and Graza's extra virgin olive oil. The internet is going wild for it, despite the fact it started off as a joke. Many agree that it hits the spot!



### **VIRIDIAN** (US)

Tomato Beef is fully vegetarian-friendly, featuring Blanco Tequila, Basil Eau-de-Vie, Pink Peppercorn, Not Lime, Tomato Water, and Bay Leaf. It retails at \$75 and is only available on premises. **ABV 40%**



### **DORITOS x EMPIRICAL** (US)

Making debut in December 2023, this limited run collaboration produced a highly unexpected flavor profile! Nevertheless, it has been highly rated for its genuine taste and soft and smooth texture. **ABV 42%**

## **GROWTH SPACES** **SAVORY SIPS**

*From salty beer to saline cocktails, beverages that move away from sweet.*

*Action: Elevate drinks with new takes on sweet and salty. Layer drinks with naturally bitter and acidic ingredients to offset the sweetness.*

*Have we reached peak sweet? A savory movement is underway, not just in beverages, but also bakery, desserts and confectionery. It could represent the biggest shift in consumer preferences in decades.*

*With modern drinkers more aware of the downsides of sugar, beverage innovators are turning to savory ingredients to fill the void – often accompanied by a more nuanced sweetness.*

*To get a taste of where this trend could go, we can highly recommend [Double Chicken Please](#), New York City, for savory cocktails like you wouldn't believe!*

## GROWTH SPACES

# MOOD MAKERS

Adult sips infusing smart ingredients that shift mood.

Action: Develop products that take consumers from morning to night, including sleep supporting liquids.



### **MOOD & BOOCHCRAFT** (us)

A range of 'feel-good functional sodas' without alcohol, containing prebiotics, antioxidants and electrolytes. The makers claim it can boost mood at breakfast, be a midday pick-me-up, a workout companion or an evening mocktail.



### **GOOD SPIRITS** (us)

'Hangover free' beverages that are made with real fruit. This range combines a fast-acting CBD distillate with valerian root, vitamin B, coffee fruit and caffeine for a gentle buzz.



### **PERFY** (us)

Targeting Gen Z, these brightly colored, sophisticated sodas claim to boost mood, not blood sugar. Liquids are enhanced with a blend of L-theanine, turmeric, and ashwagandha.

Rising incidence of stress and anxiety is driving demand for mood-supportive products, creating a huge opportunity for beverage brands.

Trend-forward brands such as [Recess](#) are harnessing ingredients widely used in traditional medicinal cultures and Western natural & organic channels, including adaptogens. Expect the buzz around so-called psychedelic mood-boosting ingredients to grow further, with kava and cognitive-enhancing nootropics including GABA emerging as ones to watch.

Messaging is less focused on detailed ingredient knowledge, more on mood impact.

For more inspiration, check out [Leilo](#), which uses kava to induce mood boosting buzz. [Odyssey](#) takes Lions Mane to bolster mood & focus. Meanwhile, [Douze](#) takes a two-pronged approach, with nootropics and probiotics.



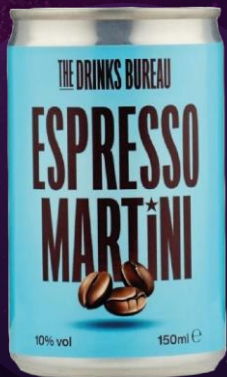
## **SYSTEM SELTZER** (US)

Pioneering flexible friend, System claims to be the first 'inclusive drinking system'. Its innovative nine-pack, with options ranging from 0% to 8% ABV, offers a unique solution that accommodates everyone at a social gathering – or one person at different points in an evening.



## **GRADIENT VODKA SODA** (CANADA)

This progressive brand sells 'gradually reducing' multi-packs, with options between 3% and 7% ABV. Its gradation of strengths, makes moderation easy.



## **GROWTH SPACES**

# **SMALL MEASURES**

*Moderation made simple. Same liquid, just less of it.*

**THE DRINKS BUREAU** (UK) offers flexibility via smaller serving sizes. These 150ml RTD mini canned cocktails and 10-serving Party Boxes come in three flavors: Spicy Margarita, Espresso Martini and Passion Fruit Martini. **ABV 10%**

## **GROWTH SPACES**

# **FLEXIBLE ABV**

*Popular liquids in a variety of ABVs – for more inclusive drinking.*

*Action: Target new and existing liquids that could benefit from a multi-strength line up. Adding flexibility is a meaningful way to renovate core ranges!*

*No & Low beverages owe most of their success to consumers who also drink alcohol, and products that make flexibility part of the offering will give these drinkers the choice to double down, down-proof or zero-proof on any occasion.*

*We foresee growth opportunities for beverages that give drinkers greater control, with standard unit sizes and ABV levels getting a rethink and non-alcoholic and alcoholic categories cross-pollinating.*

*As global appreciation of inclusivity continues, we think that flexible ABVs offer big beverage brands the chance to show support for all.*

## GROWTH SPACES

# DYNAMIC HEAT



Multi-dimensional flavor experiences with heating and cooling sensations.

Action: Develop tastes, textures, aromas and colors that bring fun and dynamism to the palate. Explore new takes on sweet heat with spicier sips layered with fruity infusions.



### **HEARTBEAT ROSÉ** (US)

This winemaker ferments peppers like grapes to create a 100% pepper wine that is blended into dry rosé. The result has been described as 'watermelon hibiscus with tangy raspberry and citrus lift, and a lingering spice on the palate with a salivating finish.' Mono, it isn't! **ABV 11.7%**



### **BIG SWIG** (US)

Adding dynamism to Big Swig's expanding range is this Party Pickle sparkling water, which is refreshing and tangy and perfect as a mixer for adding some heat for a spicy pickle cocktail. Also available: Jalapeño Pineapple.

This is the experience age, where mundane and mono flavor profiles are falling out of fashion.

In the food camp, demand for spice continues, with innovators bringing new dimensions via tangy, sweet, sour, umami and creamy pairings, meeting demand for boldness and complexity.

Helping beverages to level up, acclaimed cocktail bar [Le Syndicat](#), Paris, has created a spicy toasted coconut water and rum cocktail that is served with a coconut and habanero-infused tablet.

At [Superbueno's](#) in New York, mixologists have created Vodka y Soda, which combines guava syrup, guajillo pepper and vodka infused with pasilla chilli.

At [MMR](#), our sensory specialists work in partnership with industry pioneers to identify opportunities for more dynamic beverage experiences that are quite simply more immersive. Let us support your next liquid project and help you create a more dynamic result.

## GROWTH SPACES

# SHRUB UP!

*Healthful brews (sipping vinegars) that follow fermented food's fame.*

*Action: Harness the complexity of sipping vinegars with innovative products that do double duty as flavorful, zero-proof alternatives and better-for-you drinks with gut health benefits.*

*Innovators are digging deeper into mother nature and its full spectrum of flavors – harnessing sustainably sourced aromatics, florals, botanicals and oils to create beverage experiences rooted in nature.*

*Interest in sipping vinegars (shrub-based cordials), is on the rise. For example, [Baro](#) in India has reimaged drinking vinegar with its Mango & Curry Leaves Shrub as a savory option in an otherwise fruity line-up.*

*Moreover, the food people are reporting that bars are starting to ferment fruits, as well as using fruit peel and skins to add sipping complexity – and help to reduce food waste.*



### **JUKES** (UK)

*This innovator has introduced apple cider vinegar-based cordials that claim an 'incredible complex taste', blending a range of ingredients, including Peach blossom, Gooseberry, Cucumber, Melon, Rhubarb, Apple, Plum and Blackcurrant.*



### **SEVENSTONES** (UK)

*Small player, making premium quality, small batch runs of traditional Cornish shrub cordial using citrus fruits and local botanicals, including Samphire.*



### **ZIGGY'S WILDFOODS** (AUS)

*Utilizing seasonal wild and native ingredients to create non-alcoholic beverage mixers, these ferments include Strawberry Eucalyptus, Watermelon & Wild Citrus, Wild Wattleseed & Bush Sticky Chai, Wild Coffee & Pepper, Lemon Myrtle, and Tasmanian Strawberry & Chili.*



### **SIREN SHRUB** (US)

*Taking drinks up a notch, Siren Shrub Co deliver unique flavor complexities. Crafted from tangy, organic apple cider vinegar, fresh fruits, roots and herbs. Includes Tart Cherry, Basil, Fennel, Orange, and Jalapeno Lime.*





### **BONBUZ** (US)

Pioneering brand leveraging plant-based ingredients, such as rhodiola and L-tyrosine, to stimulate the mind, shift mood and promote social connection. Positioned as a nightlife drink, it offers mini flask versions so that you can smuggle it into your local bar... so you can 'act like you're drinking, even when you aren't'.

### **HIYO** (US)

Hiyo make mindful 'social tonics' crafted with organic adaptogens, natural nootropics, and functional botanicals to elevate mood or be truly happy on your own.

### **CLUB-MATE** (GERMANY)

'Typically associated with morning energy or nighttime relaxation, tea is expanding across the late-night beverage space as both a stand-alone drink and ingredient in cocktails and mocktails. This German carbonated herbal beverage is derived from yerba mate and has long been a favorite in the Berlin nightclub scene thanks to its balanced caffeination.



### **APLÓS** (US)

These spirits are infused with functional ingredients and formulated to enhance the immediate pleasure of taste, and the 'slow pleasures of the mind' that follow.



## **GROWTH SPACES**

# **ALT NIGHT BUZZ**

Mood boosting non-alcoholic sips that can elevate evening vibes.

Action: New nightlife habits create opportunities for new products that deliver a unique approach to wellness, community, stimulants and alcohol.

While heavy alcohol consumption remains a good night out for many, Gen Zs are famed for taking a moderate and flexible approach.

More nuanced than an all-or-nothing dichotomy of sobriety, young drinkers and non-drinkers are exploring alternative options, including products with mood-enhancing adaptogens and nootropics that promise an alcohol-free buzz with health benefits.

From experiential tea to night-time coffee, and alt spirits boasting buzzy ingredients to recovery sodas, there is much to play for.

See also: [Novak Abdon Coffee](#) and [Eve Bliss](#).

## GROWTH SPACES

# EXPERIENCE TEA

*Sophisticated tea-based beverages delivering new tastes with a health halo.*

*Action: Explore tea styles and varieties, then innovate with convenient or sustainable formats, flavors and textures. Showcase the craft element of tea, with opportunities to position as an affordable luxury.*

*Like so much else these days, tea is being reimaged! With tea traditions and styles varying diversely across cultures, third-culture creators are exploring new flavors, rituals and preparation methods, creating unique experiential drinks.*

*Consider format innovation, including capsules, instant and boba kits; rising varieties such as matcha, hojicha, oolong and sencha; tea as a rising ingredient in both new non-alcoholic drinks and alcoholic drinks; new functional tea-based drinks and flavor-forward RTDs.*

See also: [Bahari Beyond Water](#) and [Oobli](#)



### **GRYPHON** (SINGAPORE)

This brand showcases Cold Brewed Sparkling Tea RTDs in the form of creative cocktails. An innovative flavor lineup includes Hanami with White Peach, Earl Grey Lavender with Strawberry and Osmanthus Sencha with Passionfruit.



### **BOBBA** (CANADA)

Bobba 'adds a bubble of madness to your life' with a new range of alcoholic bubble teas infused with real cold-brewed black tea and beads made of fruit juice. Flavors include Dragon Fruit Lemonade. **ABV 5.4%**



### **BERCZY** (UK)

This tea centric RTD brand is launching two new products for the summer. Juicy Peach Tea and Lemon Tea sparkling vodka cocktails. The drinks are made with five-times distilled vodka, real fruit juices (25%) and organic tea. **ABV 7%**



### **NOVELTEA** (UK)

Claiming to offer a vibrant fusion of flavors, this brand has taken tea into new sectors, with flavors Rum & Green Mint, Gin & Earl Grey, and Whisky & Oolong Barrel Aged Dry Gin. **ABV 15%**



### **SKHY** (us)

SKHY offers a range of CBD-infused 'Enhanced Hydrogen Water' products, including Shine with biotin, vitamin E, hyaluronic acid and collagen – in Raspberry Rose flavor.



### **KYND** (AUS)

This inner beauty brand uses clinical semiotics to embed a range supporting wellness needs. Its Brightening Antioxidant Beauty Shot 'aids skin renewal and helps to revive radiance from the inside out.'



### **PRETTY TASTY** (us)

Lifestyle brand Pretty Tasty has created this inner beauty beverage in peach and raspberry flavors, containing collagen peptides which improve the skin's elasticity and hydration.



### **CARE LAB DIVAS** (SLOVAKIA)

Care Lab Divas offers a range of functional 'care' waters, carbonated drinks that are a combination of fresh fruit puree and four clinically proven skincare staples – collagen, elastin, hyaluronic acid and vitamin C.

## **GROWTH SPACES**

# **INNER BEAUTY**

Formulations that deepen self care routines, inside-out

Action: Expand offerings to include functional beauty fixes while meeting growing desires for global flavors and better-for-you beverages for all occasions.

The inner beauty trend has its roots in Asia but is gaining momentum in the West as consumers seek to enhance their skin, hair and nails with what they eat and drink.

Innovators are incorporating natural beauty-enhancing ingredients and new, tech-led formulations in beverage formats, with tonics, elixirs and waterless formats boasting adaptogens and natural ingredients in support of self-care routines.

Harness natural, lesser-known ingredients with beneficial properties such as sea buckthorn to generate new news.

See also: [Jove Outshine](#) and [LOHILO](#)

# NEXT BIG THING?



Exclusive research for Growth Spaces Quarterly reveals the flavors that can make your next beverage innovation more craveable!

To capture what people really think, our 1,300+ participants were asked to declare what their 'most exciting' and 'least exciting' flavor choices were from 22,000+ randomly generated choice sets.

Here we highlight the top 20 rankings from a total of 36 flavors.

For the complete picture, including the relative performances of flavors, contact us at:

[hello@mmr-research.com](mailto:hello@mmr-research.com)

## WORLD RANKINGS

Dragon Fruit  
White Grapefruit  
Guava  
Huckleberry  
Honeysuckle

Rose  
Redcurrant  
Prickly Pear  
Rosemary  
Sour Plum

Lavender  
Violet  
Fig  
Hibiscus  
Ocean Minerals

Pepperberry  
Pomelo  
Eucalyptus  
Liquorice  
Yuzu

If our results are anything to go by, you can expect to see a lot more Dragon Fruit in your glass over the next few years! In the global curiosity stakes, Dragon Fruit emerges as the clear number one, with White Grapefruit, Guava, Huckleberry and Honeysuckle completing the top 5.

We can't promise that participants in this research knew what these ingredients would taste like, but with audiences showing themselves to be more experimental, this isn't quite the barrier it once was! And remember, our research was aimed at finding out what ingredients people think would make an exciting twist to familiar flavors.

Notably, several savory hits make the top 20 – including Rosemary and Ocean Minerals.

And we were surprised to see that Yuzu only just made the top 20, since this emergent ingredient is already being adopted by many Western brands. Arguably, other curious candidates might prove more alluring.

Spoiler alert: Nettle, Pickle, Timur Pepper, Cactus and Ume are among the least motivating – failing to enter the top 30.

Perhaps the most remarkable thing of all is the relative similarity of the results across all five regions. Further evidence of an increasingly homogenous consumer.

# Next Big Thing? Regional Flavor Results



UK



US



SOUTH AFRICA



CHINA



BRAZIL

Dragon Fruit  
Redcurrant  
White Grapefruit  
Guava  
Honeysuckle

Dragon Fruit  
White Grapefruit  
Honeysuckle  
Huckleberry  
Guava

Dragon Fruit  
White Grapefruit  
Guava  
Rose  
Rosemary

White Grapefruit  
Lemon Myrtle  
Huckleberry  
Guava  
Dragon Fruit

Dragon Fruit  
Redcurrant  
White Grapefruit  
Guava  
Huckleberry

Lemon Myrtle  
Rose  
Sour Plum  
Prickly Pear  
Pomelo

Lemon Myrtle  
Prickly Pear  
Rose  
Ocean Minerals  
Sour Plum

Honeysuckle  
Pepperberry  
Liquorice  
Lemon Myrtle  
Redcurrant

Yuzu  
Osmanthus  
Pomelo  
Lavender  
Rose

Lemon Myrtle  
Hibiscus  
Fig  
Sour Plum  
Rose

Huckleberry  
Ocean Minerals  
Violet  
Hibiscus  
Rosemary

Hibiscus  
Violet  
Lavender  
Fig  
Rosemary

Prickly Pear  
Huckleberry  
Lavender  
Violet  
Fig

Fig  
Honeysuckle  
Violet  
Ume  
Wattleseed

Liquorice  
Rosemary  
Eucalyptus  
Pepperberry  
Wattleseed

Pepperberry  
Yuzu  
Saffron  
Eucalyptus  
Lavender

Redcurrant  
Pepperberry  
Pomelo  
Sea Salt  
Eucalyptus

Ocean Minerals  
Sour Plum  
Eucalyptus  
Dandelion  
Hibiscus

Prickly Pear  
Rosemary  
Sour plum  
Ocean Minerals  
Caragillo

Lavender  
Prickly Pear  
Violet  
Ocean Minerals  
Honeysuckle

# Trend//Tribe: Make your next move the right one!

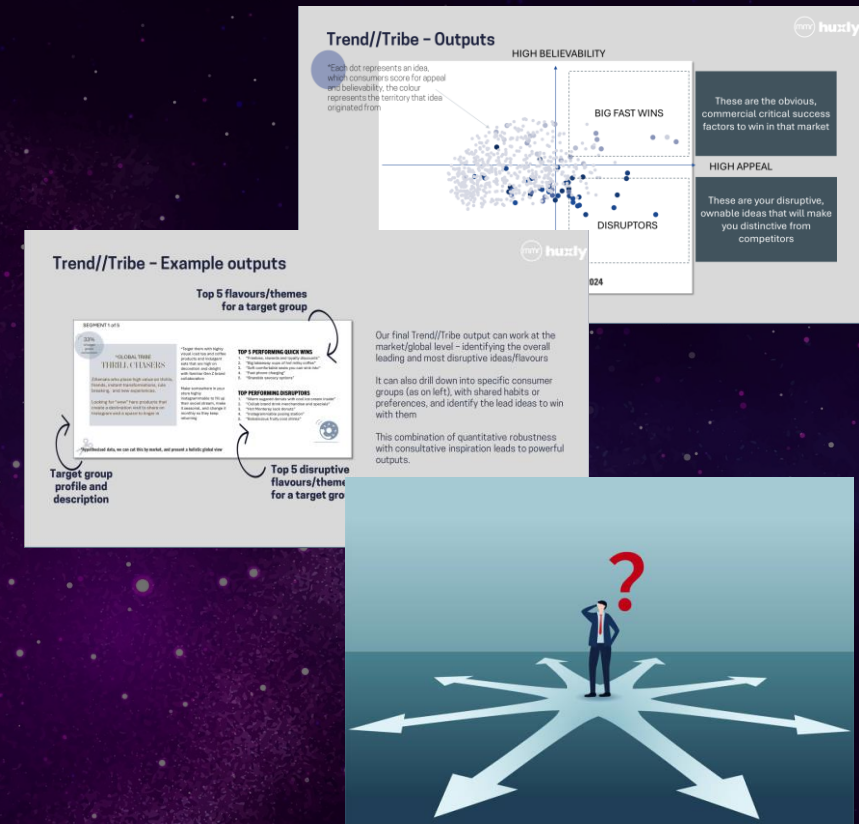
Everything, everywhere. All at once! But which trends and ideas have the greatest potential for your business?

**TREND//TRIBE** is a highly practical consumer research tool that helps companies plan their next move.

**TREND//TRIBE** fuses strategic ideation and quantitative validation to prioritize new ideas, calculating the commercial benefit, and informing on most responsive buyer profiles, with an eye on incrementality!

**TREND//TRIBE** is where your courage and creativity gets the confidence boost it needs to make your next move the right one.

- Use **TREND//TRIBE** to discover which of your ideas has the power to stand out from the crowd, plus:
- Create long term innovation pipelines for products & services.
- Identify new consumer segments that drive incremental growth.
- Understand how to activate values such as sustainability and inclusivity.
- Generate new 'micro' tribes of like-minded people that could inform future ideas...



**Interested? Book a call with Guy Grimsley**  
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**GROWTH**  
**SPACES**  
QUARTERLY

Let's work together to  
*Elevate beverage  
experiences!*

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