



Euromonitor
International

Future of Functional: Wellness in a Can

July 2025

Table of Contents

EXECUTIVE SUMMARY

Future of Functional: Wellness in a Can

Key findings

INTRODUCTION: FROM PILLS TO CANS

Rise of wellness in a can (or bottle)

Framing functional beverage categories

An expanding universe of functional claims across non-alcoholic drinks

Growing demand for “liquid medicine” but without safeguards

Social virality shapes the beverage aisle, starting first in the US

Expanding landscape for functional drinks, bolstered by traditional ingredients in Asia

Greater regulatory restraint in Europe, despite rising functional beverage demand

Moving to beverages as self-medication across multiple health concerns

A large but unevenly distributed market for functional drinks - with looming risks

SELF-OPTIMISATION, FLAVOUR AND FASHION

What is the real driver of functional beverage growth?

Is “functional” demand driven by benefits - or flavour , bright colours and vibes?

Desire to cut sugar is re-igniting BFY drinks, re-branded as “functional”

Health care scepticism is an important factor fuelling BFY + functional drinks

Poppi lawsuit provides a cautionary tale for burgeoning gut health subcategory

Rapid growth of Trip in the UK prompts a rethink of core functional ingredients

A matcha revival from perceived health benefits, influencers and visual appeal

New packaged functional RTD beverages rooted in local ingredients and culture

But does the US really need another protein drink?

Perennial wellness appeal of juicing fails to ignite packaged juice growth

The darker side of functional beverages reflected in slimming teas

Adrafül and Gorilla Mind point to the expanding territory of “energy drinks”

Hydration shifts from sports fuel to lifestyle accessory

What is really powering the functional boom?

WELLNESS IS LUXURY

Wellness culture is creating a two-tier soft drinks shelf

Consumers invest in their health, as functionality drives industry pricing still higher

Mix at super-premium online retailer Thrive Market shows the “modern” shelf

A more premium, functional shelf blurs with beauty in South Korea

Likewise, in Japan rise in FFC claims in beverages targeting beauty and ageing

GLP-1 reshapes consumption and accelerates functional innovation

Is the functional category segmenting like the beauty industry?

ALGORITHMIC SELF-OPTIMISATION

How can beverage brands capitalise on self- optimisation culture?

Wellness culture, fandom and the rise of algorithmic functional drinks

The global pandemic reshaped wellness, with algorithms steering the trends

Biohacking and the next frontier of wearable tech + personalisation + drinks

Pushing the limits of permissive function

What will algorithm-powered health mean for functional drinks?

CONCLUSION

What is the future of functional drinks?

Recommendations/Opportunities for growth

The longer-term future of functional?

Questions we are asking

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/future-of-functional-wellness-in-a-can/report.