ANBA Adult Non-Alcoholic Beverage Association

NA Industry Statistics

Updated 6-2-25

Note: Titles have links to presentations or articles when available

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IWSR (May, 2025) - No-Alc Beer's Inexorable Rise

Non-alcoholic beer is projected to overtake Ale as the second-largest beer category worldwide.

1) The quantity of NA beers being sold worldwide grew by 9% last year, while the overall beer market's volume shrank by 1%.
2) The NA beer category is projected to continue growing at an annual rate of 8% through 2029, as ale is expected to decline by 2% annually during the same period.

TIME (January 2025) – Why Gen Z Is Drinking Less

Key Insights:

- **Shifting Consumption Patterns Among Younger Adults:**
  - The percentage of U.S. adults under 35 who report drinking alcohol dropped from 72% (2001–2003) to 62% (2021–2023) — a 10-point decline (Gallup).
- **Reduced Social Drinking Occasions:**
  - People aged 15–24 now spend only 10 hours per month socializing in person, compared to 30 hours in 2003 — a 67% decline. This reduces traditional drinking occasions and has shifted consumer behaviors.
- **Alcohol Viewed as Less Trendy:**
  - Alcohol is no longer widely perceived by younger consumers as a marker of maturity or social sophistication.
- **Rise of Alternative Social Spaces:**
  - Alcohol-free venues like Sans Bar (Austin) and Hekate (New York) are growing in popularity, providing social experiences that cater to sober or sober-curious consumers.
- **Influence of Cannabis Access:**
  - With recreational marijuana legalized in nearly half of U.S. states and 80% of Americans living within 10 miles of a dispensary, some consumers may be substituting alcohol for other lifestyle alternatives.
- **Opportunity for Non-Alcoholic Brands:**
  - Trends like "Dry January" are gaining traction among younger audiences, creating seasonal peaks in demand for non-alcoholic beverage alternatives.

NielsenIQ (January, 2025) – Dry January Consumer Check-In

Market Performance:

1) Off-premise non-alcohol sales: $823 million (latest 52 weeks ending December 2024), a 27.2% increase from the previous year.
2) Non-alcohol's share of total alcohol sales: 0.7%.
3) Category growth rates:
    a) Non-Alcohol Spirits: +86% year-over-year.
    b) Non-Alcohol Wine: +27.2%.
    c) Non-Alcoholic Beer: +25.1%.

Consumer Behavior:

1) 93% of non-alcohol buyers also purchase alcoholic beverages.
2) Google searches: Non-alcoholic beverages accounted for 1.5% of alcohol-related searches in 2024.
3) TikTok engagement: 111.6 million views of hashtags related to non-alcoholic beverages.
4) Participation in Dry January has grown, with 35% of U.S. adults aware of it and 1 in 5 participating.
    a) Over 70% report improved long-term drinking habits.

Dry January Insights:

1) Dry January gained popularity in the U.S. during the mid-2010s, inspired by the UK movement.
2) 35% of U.S. adults are aware of Dry January, with 1 in 5 participating regularly.
3) Participation spans diverse demographics, with Millennials and Gen Z leading the trend.
4) Participants report key benefits:
    a) Improved sleep, better focus, and reduced alcohol cravings after one month without alcohol.
    b) Over 70% of participants report better long-term drinking habits after Dry January.
5) On-premise participation:
    a) 42% of on-premise consumers are likely to take part in Dry January 2025, with a +10 percentage point increase among ages 21–34.

Purchase Trends and Loyalty:

1) Loyalty Comparison:
    a) Non-Alcoholic Beer: 12% loyalty within total beer purchases.
    b) Non-Alcohol Wine: 11%.
    c) Non-Alcohol Spirits: 10%.
2) Non-alcohol products are increasingly included in the broader beverage portfolios of buyers, with a 31% increase in the number of buyers and a 26% increase in spending per buyer.

Key Drivers of Growth:

1) Health and Wellness:
    a) Growing focus on sleep, fitness, and productivity is pushing consumers towards mindful consumption.
2) Social Norms:
    a) Non-alcoholic options are gaining social acceptance as sophisticated alternatives.

3) Product Innovation:
    a) Advances in production technology are enhancing the taste and complexity of non-alcoholic options.
4) Availability:
    a) Expansion in dedicated menu spaces and retail placements has bolstered growth.

Product and Brand Insights:

1) Top 5 brands contribute to a majority of category growth:
    a) Non-Alcoholic Beer: 71% of growth.
    b) Non-Alcoholic Spirits: 59%.
    c) Non-Alcoholic Wine: 72%.
2) Leading beer brands include Heineken, Sierra Nevada, and Blue Moon, while top wine brands feature Wolffer and Seaglass.

Emerging Trends:

1) Functional Beverages: Increasing popularity of products with claims supporting brain health, energy, and relaxation.
2) Cannabis-Infused Beverages: Rapid growth of 600% year-over-year, with $71 million in sales driven by products containing THC, Delta-8, and Delta-9 compounds.
3) Strategic Areas for 2025:
    a) Premiumization: Focus on storytelling and high-quality ingredients.
    b) Health and Wellness: Clearly communicate tangible benefits to consumers.
    c) Flavour Innovation: Move beyond traditional fruity flavours to cater to evolving tastes.
    d) Digital Engagement: Utilize AI and digital tools to enhance convenience and creativity.
    e) Channel Expansion: Partner with restaurants, bars, and events to normalize non-alcoholic options.

IWSR (Jan, 2025) - Where Are The Opportunities For No-Alcohol Spirits In The US?

Market Growth:

1) No-alcohol spirits are the fastest-growing segment in the spirits category in the US.
2) 5-Year CAGR: Exceeding 60% through 2024.
3) Growth trajectory outpaces other no-alcohol alternatives like beer and wine.

Drivers of Growth:

1) Rise of the sober-curious movement and wellness-driven lifestyle choices.
2) Improved flavor innovations and premium positioning have mainstreamed no-alcohol spirits.
3) Shifting social norms have reduced stigma, offering sophisticated alternatives to traditional alcohol.

Seasonal Consumption Patterns:

1) January: The strongest month, with volumes more than double the monthly average due to:
    a) ‘Dry January.’
    b) New Year’s resolutions.
    c) Post-holiday consumption trends.

2) Spring (April-May): Growth during outdoor gatherings and holidays like Easter, Mother's Day, and Memorial Day.
3) Summer and Fall: Lower volumes, indicating seasonal shifts toward other beverage categories.

Regional Trends:

1) Top States: California and New York account for over one-third of the total segment volume in 2023.
2) Growth in these states: California (47% CAGR) and New York (44% CAGR) over the past five years.
3) High CDI States: Smaller states like Rhode Island, Delaware, and Vermont show disproportionately high Consumer Demand Index (CDI) levels.
    a) Rhode Island: Ranked 1st in CDI across all 50 states.
4) Underperforming States: Texas and Florida rank among the bottom in CDI despite their large populations.
    a) Strategic efforts needed: Education campaigns and expanded premium product offerings.
5) Washington D.C.: Ranked 2nd in CDI, driven by younger, urban demographics. Acts as a trendsetter for innovative marketing strategies.

Future Outlook:

1) Growing inclusivity and wellness trends will sustain the segment's momentum.
2) Strategic focus on January and springtime events and coastal hubs while addressing underserved markets.
3) No-alcohol spirits remain a key player in the evolving US beverage market.

IWSR (December, 2024) - Growth of $4bn+ Expected from No-Alcohol Category By 2028

Market Growth:

1) The no-alcohol category is expected to generate incremental growth of $4 billion+ by 2028.
2) Combined no/low-alcohol market across 10 key markets will grow at a +4% volume CAGR through 2028.
    a) No-alcohol: +7% volume CAGR.
    b) Low-alcohol: Volumes remain broadly static.

Consumer Recruitment:

1) No-alcohol is attracting 61 million new buyers (2024 vs. 2022) compared to 38 million for low-alcohol in 10 key markets.
2) Younger consumers are entering the no-alcohol category with higher frequency and intensity of consumption.

Key Growth Markets:

1) US: Expected to grow at +18% volume CAGR (2024–2028), driven by a diverse range of subcategories and consumer recruitment.
2) Brazil: Growth at +10% volume CAGR, primarily driven by no-alcohol beer.

3) Smaller markets like Canada (7.5% CAGR) and Australia (5% CAGR) show attractive growth opportunities.

Consumption Trends:

1) Younger Consumers (Gen Z & Millennials):
    a) Gen Z substitutes non-alcoholic beverages (e.g., soda, energy drinks).
    b) Millennials are more brand-loyal (57%) compared to Boomers (45%).
2) Moderation Attitudes:
    a) Younger consumers adopt moderation strategies like Sober October or Dry January.
    b) Older consumers tend to avoid alcohol entirely, favoring no/low beer or alcohol brand extensions.

Regional Insights:

1) Emerging Markets (US, Brazil, South Africa):
    a) Limited product availability remains the key barrier.
2) Established Markets (Spain, Japan, Germany):
    a) Higher product availability in on-trade and ecommerce drives growth.
    b) Pricing is more aligned with full-strength alcohol, enabling further traction.

Innovation and Product Trends:

1) Functional Attributes:
    a) Example: Free AF includes "Afterglow," a botanical extract mimicking the warming sensation of alcohol.
    b) Adaptogen-Based Cocktails: Brands like Parch Spirits use ingredients like ashwagandha, L-theanine, and ginseng.
2) Emerging Categories:
    a) Sparkling teas, hop waters, and vinegar-based switchels are gaining popularity as non-traditional alternatives.

Barriers to Growth:

1) Availability: The top barrier in emerging markets like Brazil and South Africa.
2) Pricing: A challenge primarily in mature markets such as the UK and Spain.
3) Future Outlook:
    a) RTDs: Expected to grow at +10% volume CAGR (2024–2028) off a smaller base.
    b) Beer: Leading growth in absolute volume terms at +7% volume CAGR.
4) The no-alcohol segment's share of TBA across 10 key markets will surpass 3% by 2028, with its US share doubling in the same period.

IWSR (May 2024) – Five Key Trends Shifting the Beverage Alcohol Market in 2025

Key Insights:

1) **Consumer Polarization in Spending:**
    a) Alcohol buyers are splitting into two segments:
        i) "Trading up" consumers—seeking premium, high-value offerings.
        ii) "Trading down" consumers—seeking affordable indulgence.

    b) Companies must offer a range of price points to capture both groups.
2) **Wellness-Driven Moderation:**
    a) Moderation remains a major trend globally, driven by wellness, fitness, and lifestyle alignment.
    b) No- and low-alcohol volumes are expected to continue growing through 2025, especially in developed markets.
    c) The trend is strongest among Gen Z and Millennials, who increasingly seek functional benefits, lower ABV options, or abstain completely.
3) **Rise of Cross-Category Products:**
    a) Blurring of category lines—e.g., cocktail-inspired RTDs, wine-seltzer hybrids, and functional non-alcoholic drinks with adaptogens or caffeine.
    b) These innovations offer new formats and drinking occasions.
4) **Digital Evolution of Retail:**
    a) E-commerce alcohol sales are growing, with platforms like Drizly and retail chains expanding online offerings.
    b) Consumers want fast, transparent, and personalized alcohol delivery.
5) **Localism and Sustainability:**
    a) Growing consumer preference for locally produced, sustainable products.
    b) Provenance and eco-friendly packaging are increasingly influencing purchase decisions.

Neilson IQ ANBA Presentation (September, 2024) - Non-Alcoholic Beer, Wine, & Spirits

Off Premise:

1) Total Sales: $740 million in the latest 52 weeks, reflecting a $175.8 million increase (+30.9%) compared to the previous year. This growth is primarily driven by a broader acceptance of moderation and wellness-focused lifestyles, surpassing the $500 million milestone established in 2023.
2) Segment Growth:
    a) Non-Alc Beer: 84.9% market share, +29.6% year-over-year growth.
    b) Non-Alc Wine: 11.2% of the market, showing a +27.4% increase year-over-year.
    c) Non-Alc Spirits: Comprises 4.0% of the market, with a growth rate of +85.7% year-over-year.
3) Top Channels: Food and liquor channels drive 76% of non-alcoholic growth, slightly down from 80% in the previous year.
4) Online Sales: Increased by +1% year-over-year for non-alcoholic beer, wine, and spirits.
5) Geographic Distribution: California, Texas, Florida, Colorado, and Massachusetts collectively account for 37% of non-alcoholic dollar sales.

Consumer Behaviour & Dynamics:

1) Consumer Engagement: 6 million households (21+) purchase non-alcoholic beverages, resulting in a 5% penetration among legal drinking-age households.
2) Spending Habits: Non-alcoholic purchasing households spend $700 annually on total alcohol, $213 more than exclusive alcohol consumers.
3) Cross-Purchasing: 93% of non-alcoholic buyers also purchase alcohol-containing beverages, indicating significant cross-category engagement.

4) On-Premise Trends: Around 25% of on-premise visitors have tried non-alcoholic options, with many alternating between alcoholic and non-alcoholic beverages.

Market Trends & Insights:

1) Consumer Drivers: Health and wellness, moderation, premiumization, and expanding social acceptance are key growth drivers.
2) Impulse Purchases: Non-alcoholic products benefit from high impulse buying, emphasizing the importance of in-store availability.
3) Innovation and Growth Potential: Innovations, including new product lines and functional beverages, are driving market growth.
4) Projected Expansion: The market for non-alcoholic products is expected to double within the next five years.

On Premise & Innovation Highlights:

1) Non-Alc Spirits: Non-Alc Ready-to-Drink (RTD) products, whiskey, and tequila are major growth drivers within the spirits category.
2) Innovation Sales: Total sales driven by innovation reached $75 million, a +74.6% year-over-year increase, accounting for 9.9% of total dollar sales.
3) Loyalty Trends: Lower loyalty rates suggest that non-alcoholic options are often part of a broader consumer repertoire rather than exclusive choices.

IWSR (August, 2024) - Millennials Drive No-Alcohol Gains in the US

Dominance of Millennials:

1) Participation Rate: 22% of Millennials consume both full-strength and no-alcohol products (April 2024), up from 45% in 2023.
    a) Comparatively: Gen Z at 15%, Gen X at 11%.
2) Market Share by Category (April 2024):
    a) No-Alcohol Beer: 61% of consumers are Millennials.
    b) No-Alcohol Spirits: 66% of consumers are Millennials.
    c) No-Alcohol Wine: 59% of consumers are Millennials.

Market Growth:

1) Overall no-alcohol volumes grew 20% in 2023 and are projected to grow at a +17% CAGR (2023–2028).
2) The proportion of US drinkers consuming no-alcohol products doubled from 7% (April 2023) to 13% (April 2024).

Three Reasons Millennials Boost the No-Alcohol Segment:

1) More Socialising Opportunities:
    a) Millennials are experiencing positive financial sentiment, leading to more frequent social outings.

b) They are the only age cohort in 2024 with a wider beverage alcohol repertoire than in 2023.
c) Millennials over-index in full-strength categories such as spirits, whisky, RTDs, rum, brandy/Cognac, and Champagne.
d) Substituters: Nearly 50% of Millennial no-alcohol consumers alternate between no-alcohol and full-strength alcohol products.

2) Curiosity and Openness to Trial:
   a) Millennials are eager to experiment with no-alcohol products, especially in creating mocktails and exploring alcohol-adjacent categories.
   b) Millennial males: Lead the interest in new no-alcohol spirits and products across all spirits categories.
   c) They are frequent buyers of no-alcohol brands that align with their lifestyle and values.
3) Seasonality and Lifestyle Choices:
   a) Millennials are more likely than other cohorts to participate in lifestyle trends like Dry January or abstaining from alcohol for a month or more (31% vs. 21% overall population).
   b) Functional and lifestyle motivations fuel their exploration of the no-alcohol segment.

Strategic Implications

1) Overlap Between No-Alcohol and Full-Strength Consumers:
   a) Millennials skew toward heavier overall alcohol use. When moderating, they switch from full-strength to no-alcohol rather than abstaining entirely, creating opportunities for complementary offerings.
2) Opportunities in No-Alcohol Spirits:
   a) Increasing demand for innovative no-alcohol spirits and adjacent products, especially among Millennial males, highlights a growing market segment.

Future Outlook:

1) Brands aligning with Millennials' curiosity, experimentation, and lifestyle needs will have significant opportunities for growth in this age group.

CGA by NIQ + OPUS via Forbs (August, 2024) - Gen Z Is Drinking Less Than Ever

Key Insights:

1) Reduction in Alcohol Consumption:
   a) 30% of Gen Z (ages 18-24) report drinking less alcohol compared to the previous year.
   b) 13% have given up alcohol altogether.
2) Drivers of Moderation:
   a) Health and Wellness:
      i) 74% cite pursuing a healthier lifestyle as the primary reason for reducing alcohol intake.
      ii) The trend reflects a broader cultural shift towards holistic health, encompassing both mental and physical well-being.
   b) Social Media Influence:

        i) Alcohol-free social media communities on platforms like Instagram and TikTok are amplifying the trend.
        ii) Influencers promote non-alcoholic alternatives and "clean living," positioning alcohol as a major deterrent.
3) Opportunities for the Beverage Industry:
    a) Despite reduced alcohol consumption, 60% of Gen Z consumers still visit bars and restaurants weekly.
    b) Younger consumers are 6% more likely to order soft drinks at bars.
4) Industry Perspective:
    a) According to Violetta Njunina, Client Director at CGA, “With moderation becoming a key trend, especially among younger consumers, offering appealing, high-quality, and health-conscious soft drinks is crucial.”
5) Strategic Challenge:
    a) Alcohol brands face the challenge of understanding and leveraging shifting preferences for growth and innovation, rather than seeing them as a threat.

Canada NIQ Report (July 2024)

Market Overview:

1) Market Size: Non-alcoholic beverages reached a market value of approximately $200 million in off-premise channels.
2) Growth Rate: Sustained +24% growth year-over-year, with all segments achieving double-digit increases.

Off-Premise Performance:

1) Dollar Growth Trend:
    a) Non-alcoholic beverages have seen consistent growth over the past two years.
    b) Low Alcohol Dollar Trends (in millions):
        i) 2021: $137.1M
        ii) 2022: $160.5M
        iii) 2023: $199.0M
    c) Growth by Segment:
        i) Non-Alc Beer: +23.3% vs. YA.
        ii) Non-Alc Wine: +13.8% vs. YA.
        iii) Non-Alc Spirits: +67.6% vs. YA, representing the fastest-growing segment.
    d) Non-alcoholic beverages perform particularly well during major holidays such as Victoria Day and year-end celebrations.
2) Channel Performance:
    a) Grocery banners dominate with 87% market share, growing +17.3% vs. YA.
    b) General merchandise and warehouse clubs (GM+WC): Significant growth of +172.9% vs. YA.

Consumer Behaviour Insights:

1) Cross-Purchasing:

    a) Over 75% of non-alcoholic buyers also purchase alcohol-containing beverages, indicating significant cross-category engagement.
    b) Non-alcoholic options are part of a broader repertoire rather than exclusive choices, with relatively low loyalty rates.
2) Regional Highlights:
    a) Top-performing cities account for 34% of total sales:
        i) Montreal: $25.2M (+10.8% growth).
        ii) Toronto: $14.4M (+13.7% growth).
        iii) Vancouver: $9.8M (+28.8% growth, highest regional increase).
        iv) Quebec City: $8.8M (+9.4% growth).
        v) Ottawa: $7.1M (+17.8% growth).
3) Shopper Behavior:
    a) In-Store:
        i) Penetration: 60.8%.
        ii) Trips per buyer: 5.6 trips/year.
        iii) Spend per trip: $6.90.
    b) Online:
        i) Penetration : 4.9%
        ii) Trips per buyer: 2.4/year
        iii) Higher spend per trip: $9.12

On-Premise Performance:

1) Consumer Trends:
    a) 22% of on-premise consumers opt for non-alcoholic alternatives.
    b) Younger demographics (ages 21-34) dominate, with 41% of non-alc consumers in this age group.
    c) 56% of non-alcoholic drinkers mix alcoholic and non-alcoholic drinks within a single visit.
2) Menu Expansion:
    a) 42% of consumers reported seeing increased non-alcoholic options on menus compared to last year.

Innovation & Future Growth:

1) Innovation Sales:
    a) Contributed $9.3M, growing +20% vs. YA.
    b) Innovations now represent 4.8% of total dollar sales, with the number of innovative items increasing +15.6% vs. YA.
2) Popular Formats:
    a) 44% of innovation sales are Ready-to-Drink (RTDs).
    b) 43% involve Beer/Malt categories.
    c) Single cans dominate (32% of sales), followed by four-can packs (30%).
3) Ready-to-Drink Mocktails:
    a) Sales surged to $11.8M, reflecting a +168% increase vs. YA.
    b) Mocktails mimic iconic cocktails like margaritas, gin & tonics, and Moscow mules, appealing to everyday and social occasions.

Key Demographics:

1) Age:
    a) Ages 55-64: 23.1% of buyers.

    b) Ages 35-44: 22.4% of buyers.
2) Household Size:
    a) Two-member households dominate at 41.3%.
    b) One-member households represent 23.7%.
3) Income:
    a) Key ranges: $70k-$100k (29.7%) and $125k+ (21.4%).

Strategic Opportunities:

1) Segment Interactions:
    a) Non-alc products show higher interaction with lower-alcohol beverages:
        i) Still Wine: 152 interaction index points.
        ii) Sparkling Wine: 122 interaction index points.
        iii) Beer: 113 interaction index points.
    b) Lower interaction with spirits such as whiskey and rum.
2) Future Outlook:
    a) Non-alcoholic beverages are expected to continue their upward trajectory, driven by health-conscious trends and innovation.

Drizly Survey on Top 5 Drinking Trends (February , 2024)

1) The adult NA beverage category has grown 62% year-over-year in 2023 and it isn't slowing down.
2) 63% of respondents reported they have tried or intend to try zero-proof beverages in 2024.
3) 33% specifically plan to drink mocktails.
4) Share is up 167% in 2023 to date compared to 2022, making it among the fastest-growing subcategories on the platform."
5) In addition, the majority (57%) anticipate drinking non-alcoholic beverages next year and expect to do so while relaxing at home.

IWSR (December, 2023) - No-Alcohol Share of Overall Alcohol Market Expected to Grow to Nearly 4% by 2027

Global Market Overview

1) Market Value & Growth:
    a) The no- and low-alcohol category is valued at $13 billion globally, with a volume CAGR forecast of +6% (2023–2027).
    b) No-alcohol is expected to lead growth with a +7% CAGR, while low-alcohol will expand at +3% CAGR.
    c) By 2027, no-alcohol is projected to make up nearly 4% of total beverage alcohol (TBA) volumes in the top 10 no/low markets (T10), which account for 70% of global volumes.
2) Category Dynamics:
    a) No-alcohol accounts for two-thirds of no/low-alcohol volumes.

b) Beer/Cider dominate no-alcohol, comprising 72% of the category's volume.
c) The no-alcohol segment continues to take market share from traditional alcohol.

Consumer Trends

1) New Entrants to the Category:
    a) In 2023, 17% of no-alcohol consumers and 16% of low-alcohol consumers were new to the category.
    b) Millennials and younger cohorts of legal drinking age (LDA) are the primary recruits across markets, with fewer Boomers entering the segment.
2) Substituting Alcohol:
    a) Substituters—those who switch between no/low and full-strength alcohol—grew to 43% of no/low consumers in 2023 (up from 41% in 2022).
    b) Millennials lead this trend, with 45% alternating between no/low and full-strength drinks.
3) Consumption Barriers:
    a) 47% of no/low consumers report product availability as a major barrier to increased consumption.
    b) In countries like the US, UK, and South Africa, availability is the primary concern, while in Japan, consumers cite taste preferences as the main barrier.
4) Drivers of Interest:
    a) Millennials and Gen Z are particularly interested in new no-alcohol alternatives, such as agave-based beverages, especially in markets like the US and Brazil.

Market Insights & Spotlights

1) Regional Penetration & Growth:
    a) Mature Markets:
        i) Germany and Spain: No/low-alcohol has a TBA share above 10%, with forecast growth of +2% CAGR (2023–2027).
        ii) Japan: Growth forecast at +5% CAGR.
    b) Emerging Markets:
        i) US and Canada: No/low-alcohol penetration is still under 2% but poised for significant growth.
        ii) US market worth $1.8 billion, with a forecast volume CAGR of +15% (2023–2027).
        iii) Australia: No-alcohol has grown to nearly 80% of low-alcohol's volumes, driven by Millennials who often blend no/low and full-strength options.
2) Consumption Frequency:
    a) New entrants are more likely to increase their no/low consumption compared to experienced consumers.
    b) Millennials are the largest cohort, particularly in markets like the US, UK, and Brazil.

Innovation & Emerging Trends

1) Functional Beverages:
    a) Cognitive enhancers offering stress reduction and mood enhancement are growing in popularity, particularly in the US.
    b) 29% of US Millennials reported purchasing cognitive-enhancing beverages.
2) Category-Specific Preferences:
    a) No-alcohol agave alternatives are gaining traction, driven by younger consumers in the US and Brazil.

b) European markets and Japan exhibit less interest, reflecting their older demographic and less-developed full-strength agave markets.

IWSR Report (Dec, 2023)

1) No-alcohol share of overall alcohol market expected to grow to nearly 4% by 2027
2) Almost a fifth of all no-alcohol consumers in 2023 were new entrants to the category
3) Non-alcoholic/low alcohol consumption grew by +5% last year in the world's leading 10 markets!
4) The market is now worth over $13 billion.
5) The category is forecasted to grow at a volume CAGR of +6% between 2023 and 2027, led by no-alcohol at +7%, with low-alcohol expanding by +3% over the same timescale.
6) Almost a fifth (17%) of all no-alcohol consumers in the past year were new entrants

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KAM Insight (2023) - Low+No: The Customer Perspective

1) 5.2m fewer UK adults are drinking weekly in 2023 vs 2021
2) 1-in-3 of adult pub visits do not include any consumption of alcohol
3) 25% of customers will currently default to tap water in hospitality venues if they're not drinking alcohol
4) £590m is currently lost in revenue per year because visibility, range and staff knowledge is not up to standard for Low+No

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IWSR (2022) - No and Low-Alcohol Strategic Study

1) Half of the UK adult population bought a no/low-alcohol product during 2022, boosting volumes by 9% in 2022. The no/low-alcohol category now commands a volume share of nearly 3% of the UK's total beverage alcohol market. The UK's no/low-alcohol market is expected to see volume growth at a CAGR of 7%, 2022-2026.
2) "The UK is one of the most dynamic no/low markets, with new product launches continuing a pace and growth forecasts outstripping many other countries," says Susie Goldspink, Head of No- and Low-Alcohol, IWSR Drinks Market Analysis. "While most no/low innovation continues to come from smaller players, no-alcohol variants from established brands are helping to build sector credibility."
3) Demand for no-alcohol products overtakes that of low-alcohol
4) No-alcohol overtook low-alcohol in 2022 with a volume share of 51%, thanks to impressive recent growth: no-alcohol volumes rose by 23% between 2018 and 2021, and by 16% in 2022 alone. By contrast, low-alcohol volumes were essentially flat between 2018 and 2021, but saw slight growth in 2022. The IWSR expects this trend to continue in the coming years, forecasting no-alcohol volume growth of 10% between 2022 and 2026, versus low-alcohol at 3%.
5) No/low beer dominates the market, but other segments, especially agave alternatives, see rapid growth. Beer continues to dominate the UK no/low market, and commands majority share of the no/low space in both volume and value terms. No/low-beer volumes grew 8% in 2022, and are

forecast to grow at 7% volume CAGR, 2022-2026. As no/low-products continue to see momentum in the UK, other segments are rapidly growing as well.

6) UK no/low consumption is fairly evenly distributed among different age groups above the age of 24, with 'substituters' – those who switch between full-strength and no/low products on different occasions – the most significant consumption group.

The Spirit Business (2023) - Drizly's non Alcoholic Spirits

1) The BevAlc Insights Team at Drizly said sales of all "Non-alcoholic beverages, including no-ABV beers and wines, grew by 76% on the site in January 2023 compared to the previous year, and 152% from January 2021," driven by Gen Z and Millennial consumers.
2) In the non-alcoholic 'spirits' category on Drizly, sales within the category have grown by 367% since January 2021, and by 155% since January 2022.
3) In the past 12 months, non-alcoholic 'spirits' ranked as Drizly's fastest-growing non-alcoholic subcategory compared to the 12 months prior.
4) There are now nearly 80% more non-alcoholic brands available on Drizly than this time last year.
5) Gen Z and Millennial consumers are propelling the no-ABV trend forward, with both demographics found to be 'most game' to try 0%-ABV drinks, especially when compared against older cohorts such as Gen X and Boomers.
6) Gen Z (38%) and Millennials (25%) ranked highest when asked if they've chosen to drink more no-ABV drinks in place of alcoholic drinks compared to the year prior.
7) When those surveyed were asked why they are interested in non-alcoholic drinks, "healthier lifestyle" led the way (44%), with men (49%) besting women (36%) in citing health as their primary motivation.
8) Millennials have held a 61% share of the no-ABV category in the last 12 months, compared to 52% share of sales on Drizly overall.

KAM Media (Study Commissioned by ANBA Member, Lucky Saint - UK based) - 2022

1) 55% of UK adults are trying to cut down alcohol consumption
2) 29% of adult pub visits do not include any consumption of alcohol
3) 25% will currently default to tap water in hospitality venues if they're not drinking alcohol
4) 72% of UK adults have tried a 'low or no' alcohol drink

CGA Strategy, CNN, and Spirits Business (2022)

1) American on-trade saw a US$295 million increase in sales of non-alcoholic products during Dry January compared to the same month in 2019
2) 35% of legal-aged US adults skipped alcohol for the entire month. That's an increase from the previous high of 21% who completed Dry January in 2019.
3) About 75% said they would continue drinking alcohol-free beer, spirits and mocktails, and 64% planned to stick with alcohol-free wine.

4) Participants credited their commitment to a growing selection of non-alcoholic offerings and mocktails that made it 'easier to forego alcohol while not making social sacrifices...Curiosity beyond a traditional mocktail indicates that there are more high-quality options available with compelling flavor profiles that can stand on their own"
5) QUOTE: "The selection of new options is boosting bars and restaurants' bottom lines, adding $295 million in revenue industry-wide by attracting customers who may have otherwise shied away from going out."

IWSR, Lo & No Study (2022)

1) The No-and Low-Alcohol category reached close to $10 Billion in value in 2021, up from $7.8bn in 2018. In addition, the no/low alcohol category continues to outperform full alcohol and increased its share of the total beverage alcohol market.
2) The IWSR forecasts that no- and low-alcohol volume will grow by +8% compound annual growth rate (CAGR) between 2021 and 2025, compared to regular alcohol volume growth of +0.7% CAGR during that same period.
3) Moderation is the most common use of no/low products, with significant cross-over between no/low and alcohol consumers. According to the new IWSR research, 43% of adults across the focus markets who have purchased no- and low-alcohol beverages say they are substituting those products in place of full-strength alcohol for certain occasions, rather than abstaining from alcohol overall.
4) Among adults who have purchased no- and low-alcohol products, 37% of people say that the reason for doing so is to avoid the effects of drinking alcohol. A third of drinkers buy no/low alcohol because they enjoy the taste.
5) While evening occasions at home – including socializing and mealtimes – are the most popular times for no/low beverages across all demographics, millennials and higher-income consumers across markets are more likely to use no/low products to unwind or post-exercise.

Global Market Insights (2022)

1) The non-alcoholic wine and beer market is poised to hike from around $20 billion in 2018 to over $30 billion by 2025

Drizly 2022- The Spirits Business (Original Report)

1) Sales of non-alcoholic ‘spirits’ on alcohol e-commerce platform Drizly rocketed by 290% in 2021
2) Sales of non-alcoholic spirits on their platform are up 600% compared to 2020 sales.
3) The average price per unit of non-alcoholic ‘spirits’ at US$28.60 is slightly higher than the average price of liquor at US$28.10, Drizly found, indicating that consumers are willing to pay premium prices for the subcategory.
4) Furthermore, 52% of non-alcoholic ‘spirit’ shoppers on Drizly in 2021 were female and the majority – 69% of share – were millennials. Gen X accounted for 22% share while Gen Z and baby boomers combined had an 8% share of non-alcoholic sales last year.

NielsenIQ via The Drinks Business (shared in October, 2021)

1) The non-alcoholic spirits category soared 113.4% versus a year ago, while non-alcoholic beer increased 31.7%, and wine sales were up 39.4% during a 52-week period between 2020 and 2021
2) 78% of non-alcoholic drink buyers in the US are also purchasing alcoholic beer, wine or spirits
3) Low alcohol spirits sales rose 8.5% while the low-alcohol beer/flavoured malt beverages/low-alcohol cider category saw a 4.5% lift in sales and low alcohol wine sales grew 18%.
4) The US off-trade sold US$3.1 billion worth of low-alcoholic and non-alcoholic drinks in the last 52 weeks, showing a sales lift of 10.4%.
5) Non-alcoholic drinks sales were up 33.2% reaching US$331 million during the same period, while low-alcoholic drinks saw an 8.1% sales rise of US$2.77 billion
6) Online sales of the low-and-no category soared with a 315% increase in online sales of non-alcoholic and low-alcoholic beverages in the latest 12 months versus a 26% increase in alcoholic beer, wine and spirits e-commerce sales.
7) Kim Cox, NielsenIQ SVP of account development, said: “There are many health and wellness trends emerging across centre store that are causing alcohol consumers to take a second look at their beverages. While non-alcoholic beer has been available to consumers for many years, there are now more no/low alcoholic wines, spirits and beer options available than ever before. These new innovations better meet health and wellness desires of certain consumers such as lower ABV, lower sugar, lower calorie or sustainable sourcing practices.”
8) Cox added: “The market for no/low alcoholic beverages is still relatively small at less than 5% household penetration, but is an interesting area to watch, as it now represents US$3.1 billion in sales and a 3.5% total alcohol market share.”
9) "Consumers want to be really focused on what they're putting in their bodies," Cox said in an interview with Insider. "In general, there's been such a huge trend over the last several years towards lower sugar, lower carb, lower calorie in the beverages space."