



THE POURCAST

2025 Trend Report

SIP THE FUTURE

THE BOLD BEVERAGES
THAT WILL DEFINE 2025

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EDITORS' NOTE

The beverage industry is transforming at unprecedented speed. Tomorrow's success depends on anticipating the next wave of consumer demands. Our 2025 Trend Report captures the breakthrough innovations reshaping the landscape.

Drawing on deep expertise from our Marketing, R&D, and Innovation divisions, this comprehensive analysis synthesizes proprietary insights with intelligence gathered from trade shows, market research, and our extensive network of industry partners.

Our dedicated teams transform this intelligence into customized, turnkey solutions for your business. We continuously monitor emerging trends—from groundbreaking flavor combinations to shifting consumer patterns—to power your next beverage innovation.

Let's dive into the future of beverages.



Mike Lojkutz is the Director of Marketing at Leahy-IFP. He is a Millennial girl-dad with a culinary background. He appreciates great coffee, classic cocktails and boundary-pushing flavor combinations.

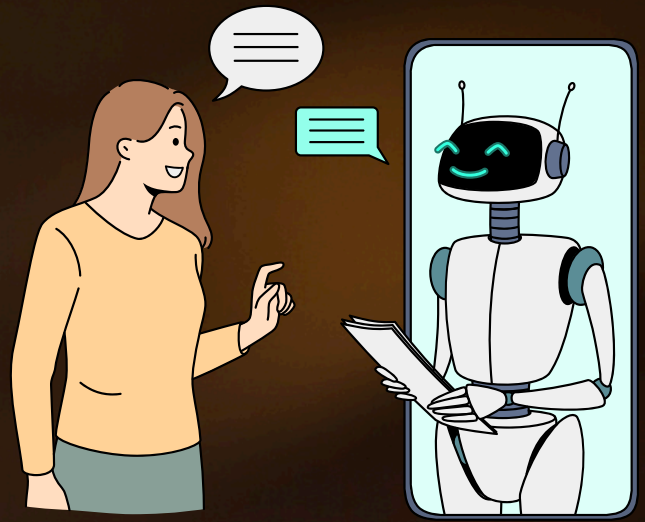


De'Airius Salibi is the Director of Innovation at Leahy-IFP. De' is a newlywed Gen Z/Millennial "cusper," a food scientist and former athlete who is obsessed with innovation, nostalgia (and for some reason Iowa).



Tara Jewell is the Marketing Insights and Content Associate at Leahy-IFP. As a Gen X mom of two, Tara is a staunch supporter of Lake Michigan tap water and has a special interest in functional beverages targeted at women.

THE ROBOT WILL TAKE YOUR ORDER NOW



Automation takes center stage in foodservice

New and innovative automated and dispensed technologies are popping up everywhere. One reason we're seeing this is that consumers have become accustomed to the on-demand nature of modern life. To keep up, operators must find ways to automate. Automation also has the potential to help their bottom line because it can reduce labor costs. When done well, automation has the potential to make everyone's life a little easier.

The industry always keeps a finger on the pulse of what Starbucks is doing. When they unveiled their new Siren Craft

System, we all noticed. The system's purpose is to help baristas get through their busiest dayparts, improve customer transparency, and enhance accuracy or wait times in the app.



53%

of consumers
think "robots
are the future"

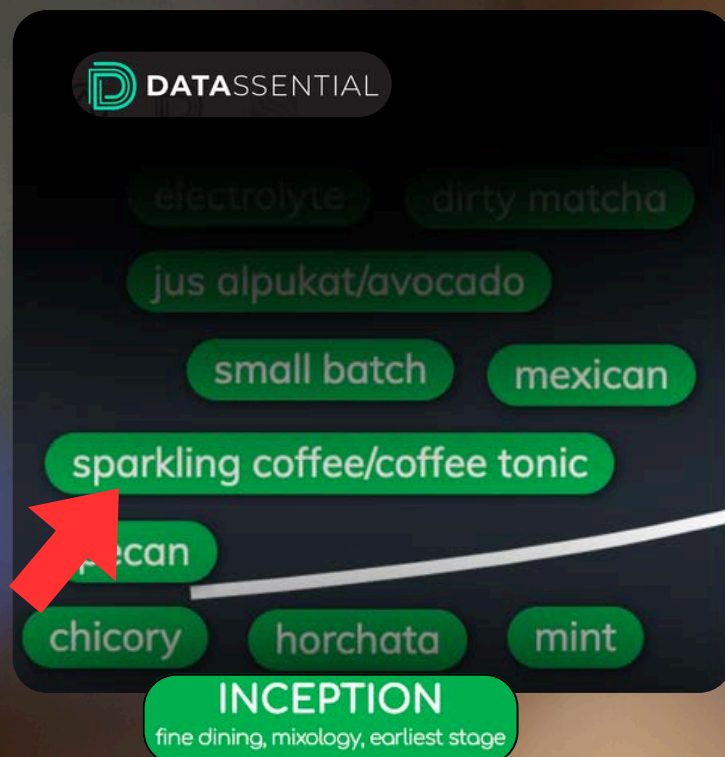
according to
Datassential

Sidework introduced its "intelligent beverage dispenser that can serve any drink." The first-of-its-kind, all-encompassing beverage dispenser promises a versatile solution that consolidates multiple drink categories into a single unit, simplifying the most complex drink builds for service staff. It's uniquely designed to fit under most counters and combines refrigeration, carbonation, and dispensing technology. They have begun rolling out in growing coffee chains (see NY-based Gregory's Coffee, for example), offices, and B&I establishments.

COFFEE ENTERS ITS SPARKLING ERA

Bubbly, bold, and bursting with flavor—coffee gets a refreshing twist

Exciting things are happening by combining fruit, coffee, and a touch of sparkle. It makes a lot of sense. The chocolatey notes of cold-brewed coffee or black tea complement the sweet and juicy flavors in ubiquitous fruits. Adding a touch of carbonation keeps it lively. These combinations will continue to migrate beyond third-wave shops to be adopted by some of the larger players. Look for **blood orange** and cold brew in sparkling applications; espresso over **ube**; iced coffee and **blueberry**; **apple crisp** with espresso and oat milk. Coffee aficionados will appreciate seeing their beloved drink at the center of so much innovation.



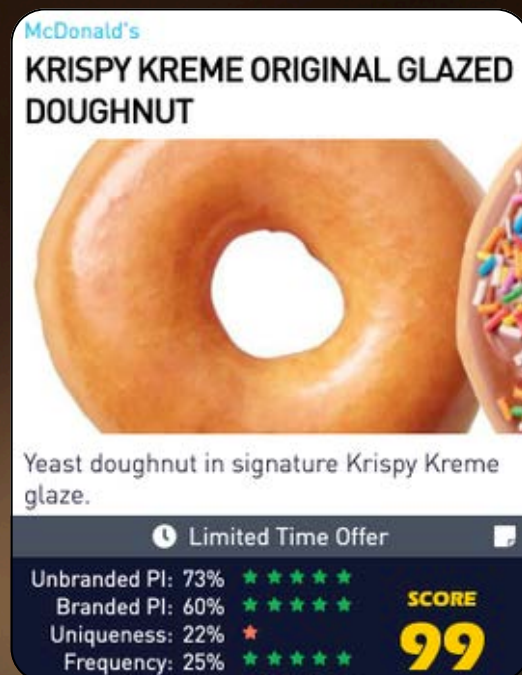
LET'S COLLAB

Collaboration will spark unique innovations, create new markets

One of the most ubiquitous trends we saw, particularly on this year's tradeshow circuit, wasn't necessarily a flavor or a function...it was a partnership. Brand collaborations were everywhere this past year on the retail level. Cookie-branded syrups, candy-branded slushies, chocolate-bar inspired coffee, luxury-branded beverages. The directions this can take are endless, and operators will continue to explore partnerships in creative ways to drive interest and generate buzz.

Retail Brands x Food Service Chains

Large retail brands are increasingly making their way into food service chains through co-branding partnerships. For example, well-known grocery store brands or retailers are teaming up with popular fast-food chains to offer exclusive beverages, snacks, or desserts. This synergy not only creates a unique product but also drives customer traffic to both the retail brand and the food service chain. These partnerships serve as a win-win for both industries, with food chains enhancing their menu offerings and retail brands gaining exposure in a new setting.



Fashion and Lifestyle Brands



Collaborations with fashion houses and streetwear brands elevate beverages into lifestyle icons. Limited-edition releases, such as this Balmain x Evian collaboration, generate exclusivity and collector appeal.

Entertainment and Gaming Crossovers

Brands are tying products to popular games, movies, or anime to reach niche audiences. These crossovers often involve unique packaging or limited-edition flavors inspired by the partnered intellectual property.

Candy-Inspired Beverages



Partnerships between beverage brands and candy companies (e.g., energy drinks inspired by popular candy flavors) cater to younger audiences and create social media buzz.



Subway x Tetris launched in Spring 2024 in honor of the classic game's 40th anniversary

LOYALTY GETS PERSONAL



Restaurants Redefine Value in 2025

Value has become a critical factor as consumers seek more bang for their buck, especially during times of economic uncertainty. American consumers are unwilling to give up their desire for a little treat, but that doesn't mean they are willing to empty their pockets for it. Datassential says consumers see dining out as something nice that they want and deserve. To encourage customers to visit their restaurant when they are having one of those "treat yourself" moments, operators are getting creative with loyalty programs and pricing strategies.

Gone are the days of keeping a wallet full of punch cards to earn a free smoothie. Loyalty is now fully digital. **Digital loyalty programs** that reward purchases with redeemable points or discounts—accessible via apps—are surging. There's always the risk that some users won't want to surrender their personal information in exchange for rewards, but it's a complicated dynamic. On one hand, Datassential reports that 54% of consumers say they worry about their privacy when it comes to app usage. On the other hand, a McKinsey study says 78% of consumers are more likely to repurchase after receiving personalized communications. So while consumers might say they find personalization a bit 'sus,' they also can't resist its appeal. Operators will stay in their customers' good graces when they offer something of real value in exchange for the intel captured each time the customer loads the app.

Beverage subscription models are growing, offering convenience and cost savings. By 2025, subscriptions are expected to generate significant growth, particularly for products like functional drinks and coffee.

Discounts for bundled purchases, such as meal-and-drink combos, continue to attract cost-sensitive consumers. This **dynamic pricing and bundling** strategy boosts sales while creating perceived value.

Consumers will continue to favor products that remind them of 'the good ol' days'



Retro Packaging and Flavors

Re-releases of vintage sodas and retro-inspired designs tap into sentimental value. A Nielsen study highlights that nostalgia-driven advertisements generate a 10% higher engagement rate and a 15% increase in conversion rates compared to non-nostalgic campaigns. This demonstrates the power of evoking emotional connections with consumers by tapping into fond memories of the past.

Artisanal Revivals

Craft sodas, stick packs, and specialty teas are being reintroduced with modern twists, such as infusions of prebiotics, adaptogens, and botanicals. This hybrid of nostalgia and health trends resonates with younger, health-conscious demographics.

Soda Fountain Classics

Traditional soda fountain drinks, such as root beer floats and cream sodas, are gaining popularity in craft forms. These nostalgic flavors are being reintroduced with premium ingredients and unique twists like lavender-infused cream soda or chai-flavored root beer.

Tea-Time Staples

Classic tea-time beverages, such as spiced chai, herbal infusions, and floral teas made with real fruit, are being modernized with cold-brew options, sparkling varieties, and functional ingredients like adaptogens.

Fruity Punches and Carbonated Beverages

Fruity punches, reminiscent of childhood parties, are also making a comeback. Brands are offering sparkling versions with natural sweeteners and exotic fruit blends. These fun, colorful drinks are appealing to consumers seeking nostalgic refreshment with a modern twist.

What made you feel nostalgic in 2024?



Tara Jewell
Marketing Insights Associate

I love when brands relaunch nostalgic logos and taglines, like BK did a few years ago with their logo. In 2024 Gatorade brought back their "Is it in you" tagline. I've always loved that slogan—short and punchy.



De' Airius Salibi
Director of Innovation

Cereal milk beverages are a time machine to carefree Saturday mornings and cartoon marathons—one sip, and I'm right back in my childhood.



Mike Lojkutz
Director of Marketing

I liked that I saw more mid-century cocktails that have fallen out of fashion on menus but remind me of my grandmas. Gin fizz, Tom Collins, highballs, vodka gimlets, whiskey sours-- simple and delicious.



GOING ALL THE WHEY ON GLP1s

For years, nutritional claims leaned toward the adjective **LOW**. Low carb. Low sugar. Low cal. These days, consumers are focused less on what to avoid, and more on what to load up on. Whether it's athletes striving to make gains or everyday folks just trying to get through the day, the health-conscious among us all seem to agree on the need for one thing—protein.

Operators have responded. According to Datassential, beverages that call out protein are expected to grow on menus 20% over the next four years. I have a suspicion it's because operators know there is a whole new segment of the population they need to court: **GLP-1 users**. As manufacturers innovate to make the drugs more accessible to a wider range of patients (to treat chronic illnesses beyond obesity), the number of users is poised to skyrocket, with the market expected to exceed \$100 billion by 2030 (JP Morgan Research). The Journal of the American Medical Association's polling indicates that 12% of adults in the US have taken or are taking a GLP-1 medication. Obviously, the main function of GLP-1 medications is to significantly curb the user's appetite and their overall desire for food. That's A LOT of not very hungry people.

Lots of people who suddenly aren't interested in eating needn't be a death knell for operators, however. Strategic menu planning can mean an expansion, not a reduction, of an operator's customer base when there's a paradigm shift in the works. Adequate protein intake is essential for GLP-1 users to help maintain muscle mass, a common side effect of rapid weight loss. Those not-as-hungry customers who might otherwise skip a meal will welcome a convenient, healthy offering that delivers that one nutrient they all need.

One protein source we see on the rise is **clear whey**. It's ubiquitous on smoothie menus, and Datassential predicts it will grow 34% over the next four years. Our R&D team has been able to leverage this ingredient in high acid formulations, allowing for a protein refresher. A protein refresher is a lighter option than a protein smoothie or shake-- a feature that will be attractive to GLP-1 users with diminished appetites.

Most Popularly Menued Healthy Terms

of all restaurants, % that offer...

The figures are based on analysis of 995,346 items on 4,861 distinct restaurant menus nationwide.



MENU PENETRATION

keyword	menu penetration	12-mo trend	4-year trend
VEGETARIAN	99.8%	0%	0%
GLUTEN FREE	76.9%	-0.8%	+1.1%
LIGHT	51.8%	-5.7%	-11.5%
PROTEIN	28.8%	-8%	+140.6%
VEGAN	24.0%	+2.5%	+33.5%

THE GLP-1 MARKET WILL EXCEED \$100B BY 2030

driven equally by
diabetes and
obesity usage

J.P. Morgan Research

THE BILLION-DOLLAR HOT FLASH

Gen X Women are Fueling a Menopause Wellness Revolution

If you're not a woman in your 40s, this might come as news to you. But trust me when I tell you; women's health is having a moment.

Gwyneth Paltrow called menopause "beautiful" on the Today Show. Naomi Watts started a beauty company targeting menopause-related skin conditions. Dr. Mary Claire Haver, a board-certified OB-GYN and menopause expert, has nearly 5 million followers on TikTok and Instagram and is revered among women 40 and above.

They, and others like them, have inspired women to demand better menopause (and perimenopause) care. While not all women are ready to take the leap to prescription hormone medications, plenty of women in their 40s and older are willing to sample the huge influx of functional foods and beverages that are said to target menopausal and perimenopausal symptoms. Given that there are an estimated 83 million women over 40 in the US alone, these buyers (about half of whom are in the oft-ignored Gen X demographic), present a huge opportunity for brands.

We saw brands answering the call. Experts like Dr. Haver are teaching women that they needn't suffer through the symptoms they're experiencing—and it's more than just hot flashes. Brands are eager to claim that many of those symptoms can be at least somewhat mitigated with the right diet—ideally one that includes large quantities of their beverage. If your skin laxity is waning, try one of the many RTD collagen beverages on the menu.

Do you suffer from brain fog? There's a mushroom beverage for that. More anxious than usual? Try a CBD-infused beverage. In the café/bakery segment alone, Datassential says those ingredients will see four-year growth of 46%, 63% and 31%, respectively.



A GREEN REVOLUTION IN BEVERAGE PACKAGING



Aseptic cartons, recyclables, and water stewardship drive the shift toward a more sustainable future

Sustainability is now a core priority for beverage companies, with a focus on reducing environmental impact while meeting consumer expectations for eco-friendly products.

Aseptic Carton Packaging

Aseptic cartons, made from renewable materials such as paperboard, are increasingly used for plant-based beverages, juices, and dairy products. They reduce food waste by extending shelf life up to 12 months and have a lower carbon footprint compared to traditional plastic or glass packaging.

Recyclable and Compostable Packaging

Industry leaders are introducing biodegradable materials and emphasizing recyclable content to align with consumer demand for a circular economy. For example, over 70% of aseptic cartons are designed for recyclability, appealing to environmentally conscious buyers.

58%

of consumers say sustainability concerns affect their day-to-day food choices

according to Datassential

Water Stewardship

Brands, including ours, are reducing water use during production, with some achieving up to 20% savings by implementing water recycling systems. We're focusing on water use as well. Leahy-IFP has implemented water saving strategies at both its West and Midwest facilities.



**LET'S GET STARTED
ON YOUR NEXT
PROJECT.**



ABOUT LEAHY-IFP

Leahy-IFP is a world-class, high-acid aseptic beverage contract manufacturer.

Where others generalize, we specialize, delivering custom turn-key solutions that accelerate growth for global brands.