



Wellness Beverage *Trends Guide 2026*

Discover four key innovation pathways driving the \$92 billion functional beverage market.

The *functional beverage* category

It has achieved high momentum in the market, standing at \$92 billion with projections to hit \$106.93 billion by 2026.¹ This growth trajectory reflects a fundamental shift in consumer expectations: Beverages are no longer just refreshment but targeted wellness solutions that can benefit health or even function like supplements.



Consumer priorities are driving four distinct innovation pathways that define the current landscape. Brain health and cognitive wellness represent the fastest-emerging opportunity, with the segment valued at \$89.4 million and growth accelerating from 6% in 2024 to over 9% by 2028 according to *Nutrition Business Journal* (NBJ). Gut health beverages dominate current market momentum, posting 34.1% sales growth in 2024, and NBJ reporting that digestive health is the fastest-growing health positioning in functional beverages.

Meanwhile, the clean-label revolution is reshaping

formulation strategies as consumers demand transparency and reduced sugar content. Premium protein beverages continue their steady expansion, with functional sports protein beverages projected to reach 9.5% sales growth by 2028.²

The data reveals a market where Generation Z (65%) and millennials (62%) are actively seeking calming and relaxing claims,³ while functional soft drink purchases surged 108.8% across U.S. retail channels in 2024—outpacing all other functional beverage categories by significant margins, according to NIQ.



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Multiple benefits drive purchase decisions

Products fortified with vitamins and nutrients are growing in demand across aisles. This surge reflects consumers' growing preference for stacked benefits, particularly among younger shoppers. As personal nutrition tools evolve, such as AI-assisted shopping lists, it's easier than ever to optimize nutrient intake through food and beverage choices.⁴ "Younger generations are really looking for the benefits of a product," says Meagan Nelson, Vice President, Retail & Distribution Growth at SPINS.

For wellness beverage brands, these trends represent substantial opportunities to capture consumer investment in products that deliver authentic, science-backed benefits while addressing multiple wellness priorities simultaneously.

Trend 1: Beverages that function like supplements

Brands in the functional beverage category transform sips from simple refreshment to targeted wellness solutions, with consumers seeking drinks that deliver measurable health benefits beyond basic nutrition. Leading this transformation is a significant shift toward cognitive wellness, where beverages are increasingly positioned as tools for mental performance and stress management. Notably, mental wellness beverages driven by natural ingredients and herbal remedies are gaining popularity for stress relief and mood enhancement.⁵

Brain health revolution: The "focus on focus" phenomenon

The brain health beverage category is experiencing what



*The functional beverage category has achieved high momentum in the market, standing at \$92 billion.**

*New Hope Network



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industry leaders describe as a “focus on focus,” driven by young professionals and adult students increasingly feeling the effects of burnout. Mood and mental health benefits are increasingly tied to cognitive health in brain health beverages, reflecting a holistic approach to mental wellness that extends beyond traditional cognitive enhancement.

The trend toward calming and relaxing claims has bolstered brands like Recess, which positions itself as “calm cool collected” and has become the largest alcohol alternative brand and the second-fastest-growing beverage brand on Amazon.

Other brands, such as Aonic Inc and Karma Water, align with this trend in their formulations targeting energy and recovery, plus “optimal focus and cognitive health”—in line with consumers’ desire for holistic brain health solutions that address mental wellness, cognitive performance and stress management simultaneously.

Adaptogen and mushroom integration: Nature’s cognitive enhancers

Adaptogens and mushrooms stand out as up-and-coming ingredients in the space, with impressive

market performance backing their popularity. SPINS data reveals that while ashwagandha posted impressive 23.7% growth and \$324,467 in sales for the 52 weeks ending January 26, 2025, ginkgo biloba continues to dominate the brain health beverage market with \$60,499,751 in sales according to NBJ—maintaining its status as

the category’s top-performing functional ingredient.

Mushrooms are gaining significant traction in beverages for their brain health benefits, with key fungi including lion’s mane, reishi, cordyceps, maitake and shiitake leading

the charge. SPINS data reveals that cordyceps led all mushroom ingredients in brain health beverages with \$576,882 in sales, though chaga mushrooms posted the strongest growth rate at 43.8% in 2024.⁶

The caffeine alternative movement

This growing interest in natural cognitive enhancers coincides with a broader movement away from traditional stimulants, as consumers seek cleaner energy sources. Concerns over caffeine have opened the door to different energy ingredients, as sales of caffeine in

functional beverages for brain health dipped 14.3% in 2024 compared to the year prior, falling from \$1,651,737 to \$1,416,031, according to SPINS.⁷

This decline reflects growing consumer awareness about the negative effects of high-sugar, high-caffeine combinations. As negative health effects of high-sugar, high-caffeine formulations gain media attention, consumers are exercising greater caution when selecting energy beverages.

Market response to alternative energy ingredients has been remarkable. According to SPINS, matcha sales in functional beverages for brain health had 393.6% growth, reaching \$2,095,538 in 2024 compared to \$424,562 in 2023. This surge demonstrates consumer appetite for clean energy alternatives that provide sustained focus without the jitters or crashes associated with traditional caffeine.⁸

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— Meagan Nelson, Vice President, Retail & Distribution Growth at SPINS





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Successful brands in this space are proving that *reducing sugar* doesn't mean *sacrificing taste*.

interact with other functional ingredients to create complex, satisfying flavor profiles. Brands are investing heavily in flavor innovation that maintains indulgence while supporting health goals, often incorporating complementary ingredients that enhance both taste and function. This flavor innovation is being supported by a fundamental reformulation movement that prioritizes ingredient transparency and natural alternatives.

The clean, low sweetener revolution

The movement away from high-sugar formulations and artificial sweeteners has accelerated dramatically. “Clean label” and “natural” trends remain a priority among functional beverage consumers, driving demand for greater transparency and fewer artificial additives and ingredients.

For example, brands like Levl Beverages deliver stacked benefits while maintaining clean ingredient profiles. Made with açai, blueberries and goji berries, along with hydration-supporting aloe and nopal, adaptogenic ashwagandha, Levl's typical beverage contains a modest 2 grams of sugar, plus organic erythritol, in a formulation that addresses multiple wellness priorities—antioxidant support, hydration, stress management and clean energy.

Similarly, FiberBliss uses monk fruit sweetening in their “clean and gentle” formulations. Their approach addresses multiple consumer concerns simultaneously—delivering sweetness while supporting satiety, craving control and energy through a fiber-infused product.

Trend 2: Reducing sugar bolsters clean-label innovation

As consumers become increasingly mindful of their sugar intake, the demand for low-sugar beverages has surged, driving brands to prioritize innovation in this space. Most low-sugar beverages aim to keep flavor and novelty, as consumers are still looking for indulgence along with health. Clean ingredient lists have become a critical selling point in this category, providing transparency about ingredients and production processes.

Successful brands in this space are proving that reducing sugar doesn't mean sacrificing taste. The key lies in understanding how natural sweeteners



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Mushrooms are gaining significant traction in beverages for their brain health benefits.

Trend 3: Gut health beverages boom in the GLP-1 era

Gut health beverages are a critical driver in the functional beverage market, reflecting the growing recognition of the gut microbiome's role in overall wellness. Products featuring prebiotics, probiotics and dietary fiber are in high demand, marketed as tools for improving digestion and bolstering immunity. Digestive health is the fastest-growing need state across the broader functional beverage market, increasing 34.1% in 2024 according to NBJ.

The prebiotic soda phenomenon

The prebiotic soda category represents one of the most dramatic success stories in functional beverages. Functional soft drink purchases shot up 108.8% across U.S. retail channels in 2024, reflecting consumer desire for familiar formats—such as sodas—enhanced with meaningful health benefits.

PepsiCo's entry into this space underscores the category's mainstream appeal. The company's investment in prebiotic sodas demonstrates how major beverage corporations are recognizing the intersection of indulgence and wellness as a key growth driver.

Probiotics as a base for innovation

Probiotics have transcended their original

gut health focus, now targeting cognitive and mood benefits.

The 2024 growth figures tell the story: 5.6% overall growth versus just 4.1% in gastrointestinal applications, signaling market maturation in the traditional gut health space.⁹

Products combining probiotics with other beneficial ingredients targeting specific health goals, such as collagen for healthy skin, hair and nails, have emerged as strong players in this category. Brands taking a combination approach position themselves to capture demand across multiple high-growth categories simultaneously.

For example, Lifeway's recent probiotic beverage innovations combine their kefir expertise with trending ingredients like collagen and colostrum. Probiotic smoothies with collagen address multiple consumer needs simultaneously—gut health through probiotics, beauty and joint health through collagen and immune support through fermented benefits.

The brand's colostrum shots align with the immunity shot category that continues to thrive, even after the pandemic. These products provide a "food-oriented" way to boost immune health, leveraging the gut-immune connection that



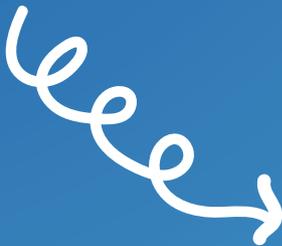
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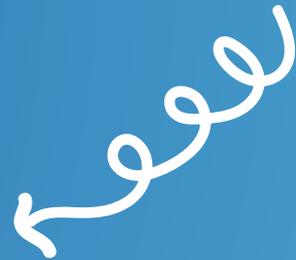
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consumers increasingly understand and value.

GLP-1 support: The emerging opportunity

The rise of GLP-1 medications is creating new beverage opportunities focused on nutrient density and muscle preservation. There’s certainly a growing category of products that help deliver quality nutrients when the user is more easily satiated.

GLP-1 medications may cause muscle loss representing 25-39% of total weight reduction according to studies, generating market demand for beverages that maintain muscle mass while providing nutrient density. This trend opens doors for specialized protein and fiber beverages targeting the GLP-1 user demographic.¹⁰

Fiber as the accessible gut health solution

Finally, there is still plenty of room for growth when it comes to fiber—an ingredient with solid research backing its benefits for overall health improvement. Industry experts note that fiber represents an “easy top-of-funnel product for consumers” requiring minimal education, as opposed to the trend of “designer probiotics” that demand more consumer understanding.¹¹

Brands such as FiberBliss capitalize on this accessibility,



The protein market is “not even close” to reaching saturation.*

* Nutrition Business Journal

positioning fiber as a foundational wellness ingredient that consumers can easily understand and incorporate into their routines.

Trend 4: Drink your premium protein

The protein beverage category shows robust growth as consumers increasingly prioritize convenient, clean protein sources that support their wellness objectives and

active lifestyles. In a time where ready-to-drink protein shakes easily substitute traditional breakfast or other meals, brands are responding with clean-label innovations that deliver accessible nutritional solutions, meeting the escalating demand for protein-rich beverages positioned as both meal replacements and nutritional supplements.

Grass-fed whey protein maintains its premium market position as consumer demand for high-quality



protein sources continues to grow. Increasing numbers of consumers are actively seeking grass-fed protein options across all formats—powders, bars and ready-to-drink beverages—while simultaneously prioritizing clean-label formulations that minimize processed ingredients such as sugar alcohols and artificial flavors.¹²

According to NBJ analysis, the protein market is “not even close” to reaching saturation. This assessment reflects the solid foundation built through widespread consumer education about protein’s nutritional value. The sustained industry focus was evident at Natural Product Expo West 2025, where protein dominated conversations, signaling continued innovation and investment in this category.

Protein plus beauty and wellness benefits

NBJ identifies collagen as the third-ranked supplement in the healthy aging category, with an anticipated 25% growth rate for 2025. This growth reflects the expanding market for ingredients that support comprehensive

wellness beyond traditional fitness applications.¹³

Meanwhile, emerging bioactive ingredients like colostrum are gaining traction for their multifunctional properties. Colostrum provides immunoglobulins, growth factors, and probiotics that work together to support immune system balance and promote recovery processes.

Lifeway’s strategic integration of collagen into their probiotic smoothie line and colostrum into wellness shots merges probiotic support with beauty and wellness benefits. This innovation showcases how protein beverages are transforming from simple gut health or muscle-building products into comprehensive wellness solutions that target skin health, joint support and immune function.

Prioritizing taste and texture

The success of protein beverages increasingly depends on solving traditional challenges around texture and taste. Brands are investing heavily in formulation technologies that deliver high protein content without the chalky, artificial characteristics that historically limited protein beverage appeal. Simple formulas like sparkling protein are growing because they address consumer desire for branded, great-tasting products that provide functional benefits without overly complex ingredients lists.

Capitalizing on the functional beverage boom

The wellness beverage market’s evolution reflects a fundamental shift in consumer expectations—from simple refreshment to targeted health solutions. The convergence of multiple trends—brain health, gut wellness, clean-label ingredients and functional nutrition—is creating unprecedented opportunities for brands that can deliver authentic,

science-backed benefits in convenient, great-tasting formats.

For natural products retailers, brands, manufacturers and product innovators, the data is clear: consumers are willing to invest in beverages that support their health goals, particularly when those products address multiple wellness priorities simultaneously.

The brands succeeding in this space combine this insight with ingredient innovation, creating products that feel both indulgent and beneficial. As the functional beverage market continues its rapid evolution, the opportunities for growth remain substantial for brands that can authentically address consumer health priorities.

1. New Hope Network Functional Food & Beverage Special Report, 2025; <https://store.newhope.com/products/functional-food-and-beverage-special-report>
2. Nutrition Business Journal: Functional Food and Beverage Issue, April 2025
3. ADM 2024 Beverage Innovation Report
4. The Next Generation of Consumers: How Millennials & Gen Z are Redefining the CPG Landscape, SPINS, 2025
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9. Nutrition Business Journal: Condition Specific Report 2025
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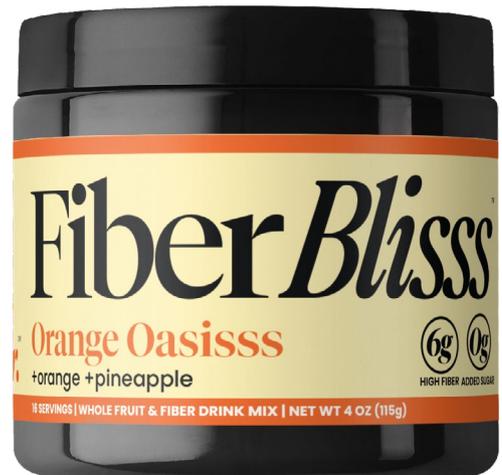


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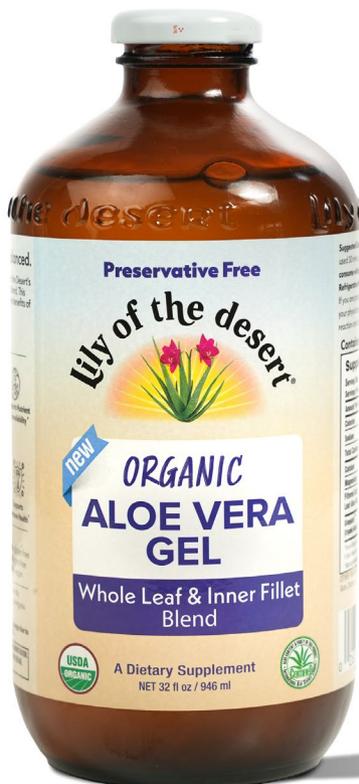
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