



2026 Trend Predictions

YOUR PREVIEW FOR THE YEAR TO COME



Executive Summary

The food, beverage, and wellness industries are undergoing a profound transformation driven by shifting consumer values, technological acceleration, and economic volatility. This report identifies and explores the most critical trend areas shaping the 2026 landscape, with a special focus on how brands, retailers, and innovators can stay ahead of disruption.

At the core of this transformation are three macro forces:

- **Conscious Consumption** – A values-driven approach to health, sustainability, and transparency.
- **Anywhere Commerce** – The rise of frictionless, omnichannel, and ambient shopping experiences.
- **Non-Human Participation** – The growing influence of AI, automation, and synthetic agents in shaping consumer decisions and product development.

These forces are not isolated—they are converging, accelerating, and redefining what it means to innovate, compete, and connect with consumers.

Key Highlights

- Tariffs and pricing pressures are **reshaping cost structures and promotional strategies**, with historical patterns offering clues to future behavior.
- Emerging brands are **disrupting sleepy categories** through global flavors, sustainability, and cleaning up the familiar.
- **Premiumization is being democratized**, with private label stepping in to deliver high-quality experiences at accessible prices.
- **Younger generations** are rejecting rigid diets in favor of balance, personalization, and occasion-based eating.
- **Non-UPF and Clean Label movements** are gaining momentum, driven by consumer skepticism, state-level legislation, and proactive reformulation.
- Nutrient density is being redefined by **practicality and performance**, with protein, fiber, and sugar alternatives at the center of the conversation.
- Functional ingredients are evolving from **niche to mainstream**, with crossover between supplements and food/beverage formats accelerating.



Research Methodology

- **Approach overview:** Given the complexity and nuance of conscious consumption across channels, categories, and demographics, our analysis draws on a broad set of datasets to build a comprehensive evidence base for trends and predictions. These sources include:

Primary Research came from SPINS:

- SPINS POS Data | Total US Natural Expanded & Mulo + Conv (Powered by Circana), Amazon (Powered by Stackline)
- SPINS TriLens Panel . Total US- All Outlets
- Price Intelligence
- July 2025 SPINS survey of U.S. Gen Z & Millennial shoppers (n=1,000).
- May 2025 SPINS survey of total U.S. Vitamin & Supplement shoppers (n = 1000).

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New Market Environment

Changing dynamics in the industry and beyond



2026 TRENDS PREDICTIONS

An emerging (and disruptive) set of realities are accelerating some priorities, bringing new ones to the table, and **fundamentally transforming** the tradition of how, why, and where people shop for food



**CONSCIOUS
CONSUMPTION**



**ANYWHERE
COMMERCE**



**NON-HUMAN
PARTICIPATION**





2026 TRENDS PREDICTIONS

An emerging (and disruptive) set of realities are accelerating some priorities, bringing new ones to the table, and **fundamentally transforming** the tradition of how, why, and where people shop for food

A **values-driven** approach to **health, sustainability,** and **transparency**



CONSCIOUS CONSUMPTION



ANYWHERE COMMERCE



NON-HUMAN PARTICIPATION



78% US consumers say a sustainable lifestyle is important¹

41% Contribution to CPG growth in 2024 from sustainability-marketed products²

90% of Gen Z & Millennials are actively looking to avoid using or consuming certain ingredients³



2026 TRENDS PREDICTIONS

An emerging (and disruptive) set of realities are accelerating some priorities, bringing new ones to the table, and **fundamentally transforming** the tradition of how, why, and where people shop for food

The rise of **frictionless, omnichannel**, and ambient **shopping experiences**



CONSCIOUS CONSUMPTION



ANYWHERE COMMERCE



NON-HUMAN PARTICIPATION



15%

Total retail was E-commerce in Q2 2025 (+5.3% yoy)¹

\$100B

Social commerce market by 2026²

\$67.3B

Retail media ad spend forecasted for 2025³



2026 TRENDS PREDICTIONS

An emerging (and disruptive) set of realities are accelerating some priorities, bringing new ones to the table, and **fundamentally transforming** the tradition of how, why, and where people shop for food

The growing influence of **AI, automation,** and **synthetic agents** in shaping consumer decisions and product development



CONSCIOUS CONSUMPTION



ANYWHERE COMMERCE



NON-HUMAN PARTICIPATION



75% of consumers say they're open to a trusted AI personal shopper that understands their needs ¹

~9 in 10 retailers are adopting or piloting AI ²

68% retailers want gen-AI to transform marketing/content ³



2026 TRENDS PREDICTIONS

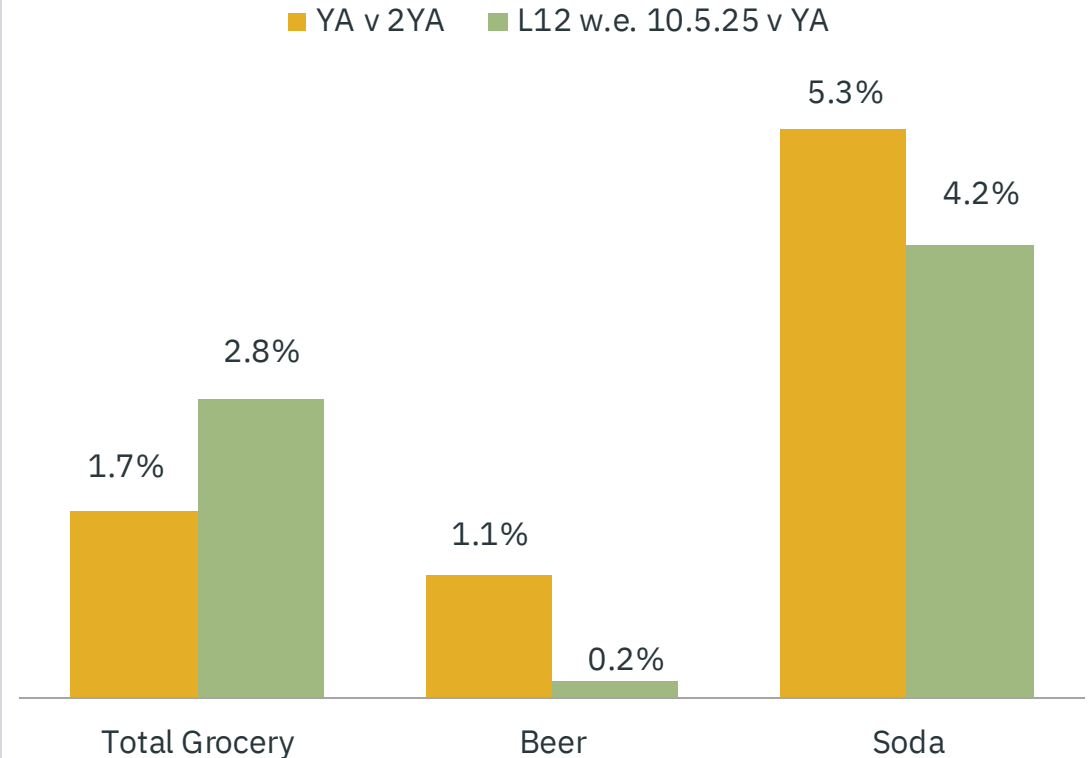
Despite rising tariff rates, prices to consumers have so far been muted

Price increases have decelerated in the categories with higher exposure to rising tariffs, including products with steel or aluminum packaging

US Steel & Aluminum Tariff Revenue

FY 2024 \rightarrow FY2025[^]
\$1.609B \rightarrow \$7.79B

Average price change by category



Source: US Customs and Border Protection Trade Statistics. FY 2025 updated as of August 31, 2025. Amount includes Estimated and final duties, taxes, and fees paid by the trade community, including adjustments for refunds..

[^]FY 2025 is updated as of August 31, 2025

SPINS Average Price, Latest 12 weeks ending 10.05.2025.



2026 TRENDS PREDICTIONS

Global market volatility disrupts Cost of Goods early, with lagging (but inevitable) consumer burden



Global commodity prices:
+1.4% v 2YA



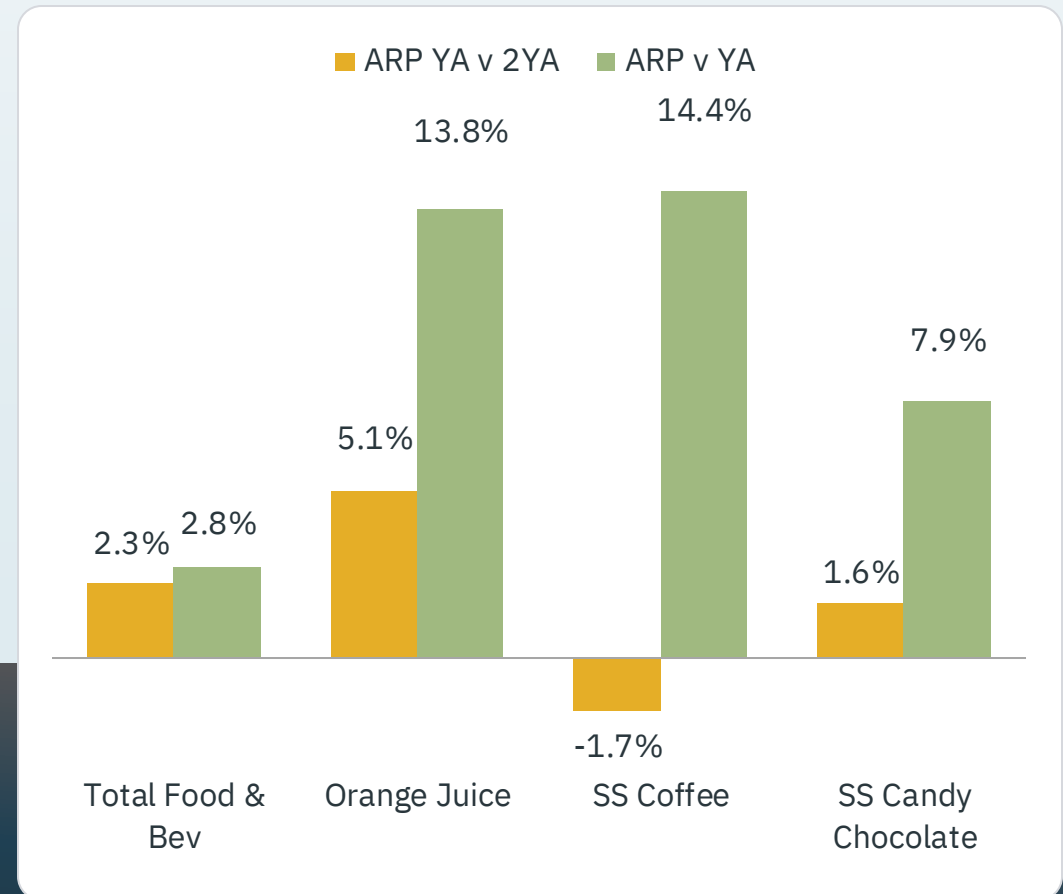
Global Orange Prices:
+136% from 2023 to 2024



Global Coffee Prices:
+75% from vs 2YA



Global Cocoa Prices:
+170% from vs 2YA

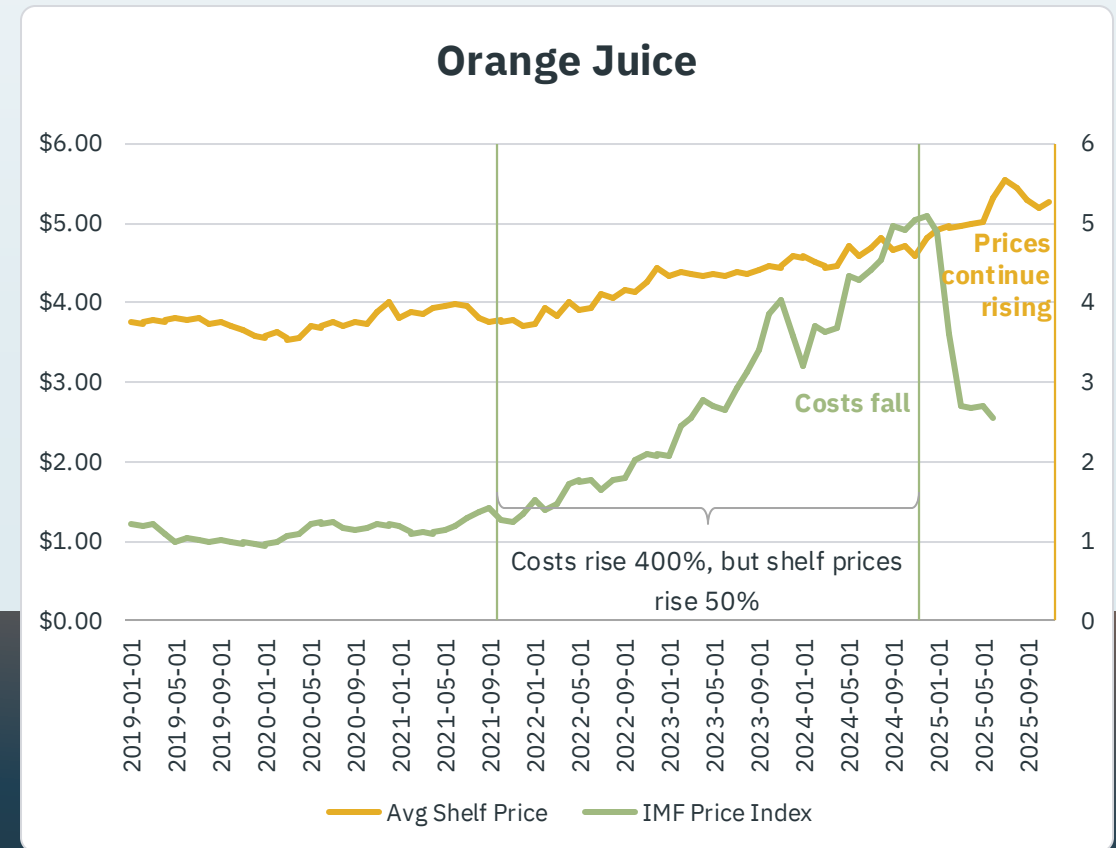
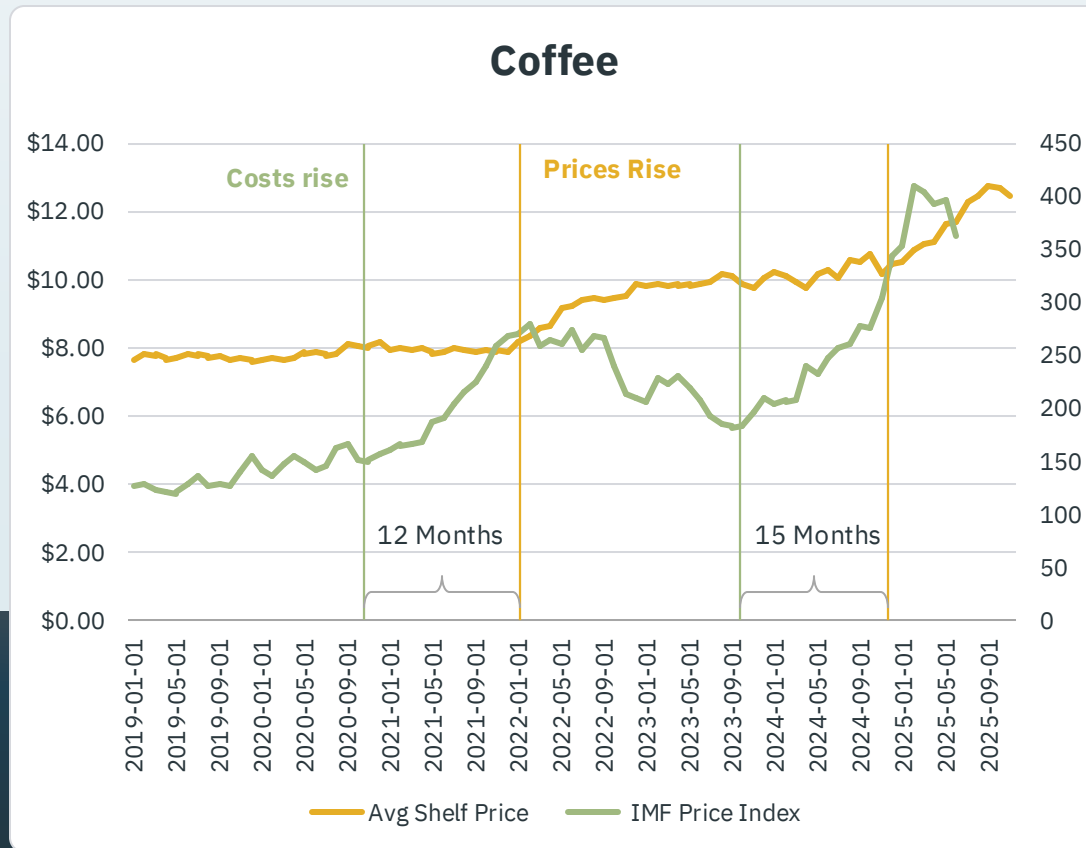




2026 TRENDS PREDICTIONS

A high threshold for change

Shelf price is sticky; the grocery supply change takes a conservative approach to price changes





2026 TRENDS PREDICTIONS

Levers in play to mitigate higher cost of goods

Lever 1: Contracting promotions

An early, high impact action to improve product-level profitability

| Category | Chg in Promo Wks | Chg in Promo Depth |
|------------------|------------------|--------------------|
| Total Food & Bev | +0.08 | +30 bps |
| RF Orange Juice | -1.40 | -112 bps |
| SS Coffee | -1.34 | +23 bps |
| Chocolate Candy | -1.17 | -57 bps |
| Chocolate Baking | -1.01 | -11 bps |

Lever 2: Distributed impact

Spreading tariff costs across their portfolio, raising price of items with less exposure to tariffs

ARP % Chg - L12 v YA

Soda Packaging Type



Cans

+4.0%



Plastic

+4.0%

Ripe For Disruption

Categories that could see rapid change in 2026

2026 TRENDS PREDICTIONS

The next wave of category reinvention

Disruption occurs when emerging brands or products with new attributes gain market share from the traditional leader and drive marketplace evolution.

A few sleepy categories ripe for reinvention:

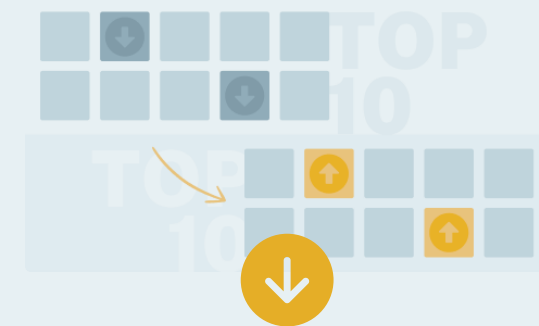
- **Pantry Segments**
- **Lunchbox Ingredients**
- **Oral Care**
- **Supplements**



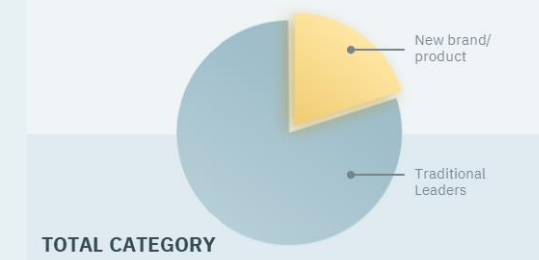
DISRUPTION STARTS WITH INNOVATION...



SURPRISING GROWTH...



MARKET PENETRATION

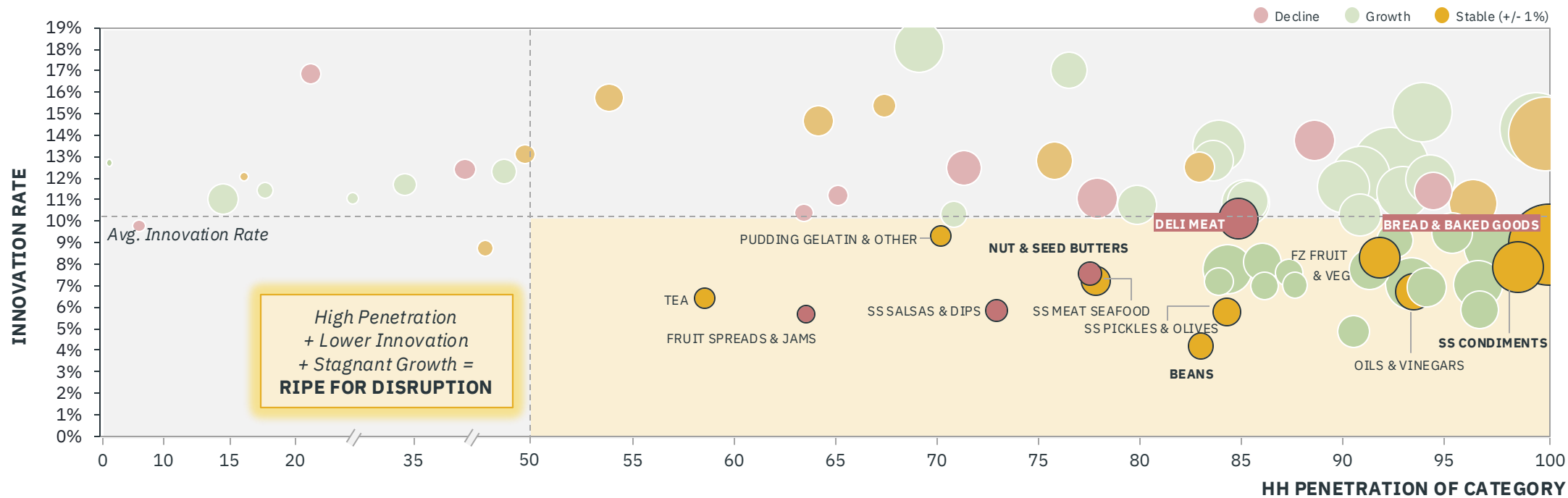




2026 TRENDS PREDICTIONS

Calculating disruption: Strong shopper presence + low growth + minimal innovation

Food & Beverage – Household penetration & innovation rates





2026 TRENDS PREDICTIONS

Legumes as a prime example of disruptive pantry staples

Nutrient dense products that capitalize on need for healthy convenience, global flavors, and cultural familiarity

Beans

+0.2% \$ vs YA

- ✓ Fit a “fiber-maxxing” diet
- Room to move beyond the can; more convenient meal formats.

Nut Butters

-1.0% \$ vs YA

- ✓ Inherently high protein
- ✓ Vehicle for flavor versatility.
- More options w/out seed oils.

Beans Around the World



**Globally-inspired.
Ready-to-heat**

(e.g., Indian chickpea curry,
Mexican charro beans)

More Nut Bases, More Spice



Turkish Candy
+255%



Pistachio & walnut



Chili crisp
+22%



Chili or “swicy”
peanut spreads



2026 TRENDS PREDICTIONS

Classic lunchbox ingredients are ripe for a refresh

| Building a Better Sandwich | | Condiment Refresh | |
|---|--|--|--|
| Cleaner Options | Deli Meats -1.6% \$ vs YA Learn from other meats: organic, uncured options with humane sourcing | Bread & Bakery -0.8% \$ vs YA Emphasize true fermentation + regenerative or sustainable grains like Einkorn | Mayo -1.0% → Avocado Oils +23% → <i>Intersection of BFY bases + bold spice (wasabi, harissa, chimichurri)</i> |
| | Variety Expansion Global varieties like Jamón Ibérico & French Pâté for adventurous hosting | | Expand Sourdough and specialty bases to adjacent areas, like tortillas or pastry |
| Natural Meats: 6% of sales 100% of growth | +14% Specialty Loaves & Buns | Salad Dressing -4.6% → Natural Dressings flat → <i>Acidity/fermentation + digestive health benefits</i> | |

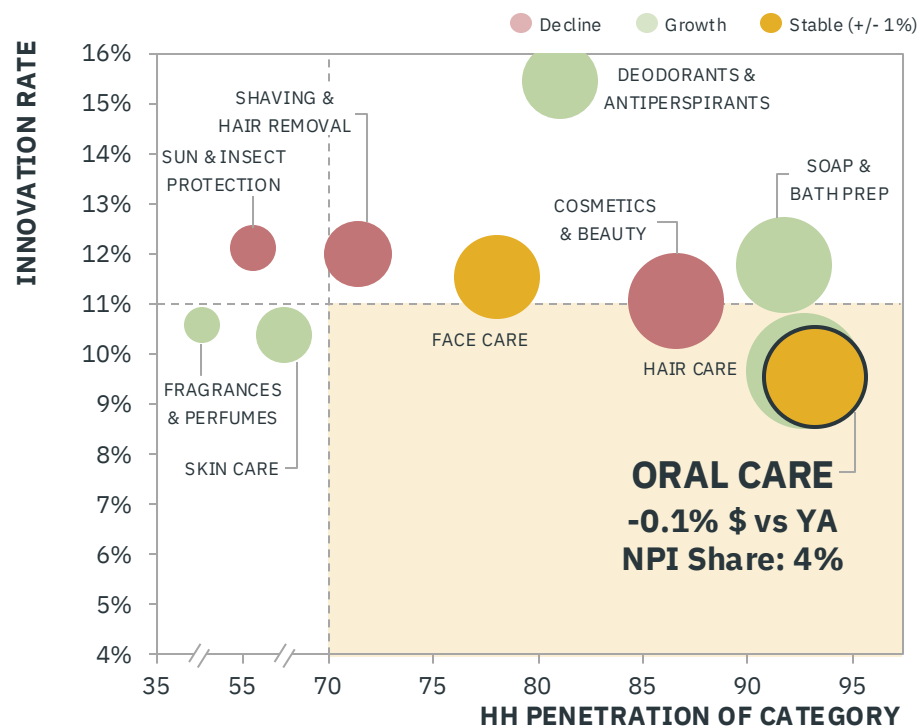


2026 TRENDS PREDICTIONS

Tooth-paste, present, future

Toothpaste has seen disruption from fluoride alternatives, with room still to innovate elsewhere

Disruption potential in body care



Family-Friendly Fluoride Alternatives



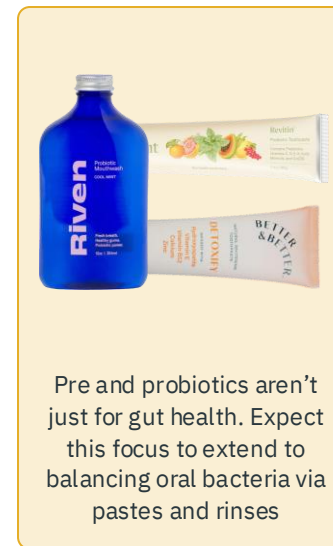
Hydroxyapatite products are starting to prioritize kids, making room for more flavor innovation *across ages*

More Eco-Friendly Forms



Toothpaste packaging is plastic-heavy, and tablets are still in early stages of adoption. Opportunity for recyclable tube options

Balancing the Biome



Pre and probiotics aren't just for gut health. Expect this focus to extend to balancing oral bacteria via pastes and rinses



2026 TRENDS PREDICTIONS

A dose of disruption in Vitamins & Supplements

HORMONES²
+6.2%²

Hormonal Health

13% of VMS consumers express Hormonal Balance as a top goal⁴; TRT averaged +9% annual growth over 5 years⁵

Functional Boost for Intimacy



Formats That Feel Like a Treat



JOINT HEALTH
-4.9%¹

Joint Health Activation

25% of adults in the U.S. have arthritis³

Peptides For Inflammation



Newer Designs for Absorption



Growth of Labeled Vegan (+11%)



ENERGY SUPPORT
-2.8%¹

Energy, Hold the Caffeine

27% of VMS consumers prioritize energy & stamina as a top health goal⁴

RTD Meets On-The-Go



Caffeine Alternatives



Sources: 1. SPINS Natural Expanded Channel & MULO + Convenience (powered by Circana), Total VMS by Health Focus \$ Change 52 Weeks Ending 11.30.2025 vs YA

2. Hormones is a custom segment, composed of the following SPINS health focuses = Menopause + PMS + Reproductive Health

3. <https://odphp.health.gov/healthypeople/objectives-and-data/browse-objectives/arthritis>

4. May 2025 SPINS survey of total U.S. Vitamin & Supplement shoppers (n = 1000) "What are your top health goals when choosing a supplement?"

5. <https://www.aafp.org/pubs/afp/issues/2017/1001/p441.html#:~:text=Testosterone%20therapy%20is%20increasingly%20common,the%20risk%20of%20cardiovascular%20complications.>

The Premiumization Paradox

How declining innovation opens
the door for private label premium



2026 TRENDS PREDICTIONS

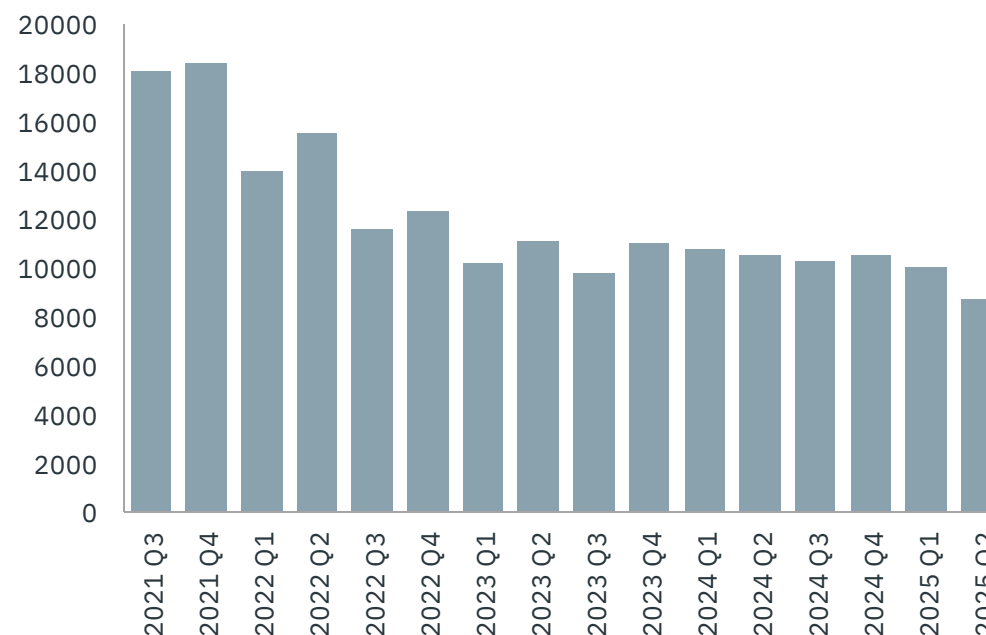
Premiumization and the innovation gap

The gap between premium demand and new product innovation creates opportunity in the market

Premium products lead CPG growth

| Avg. Retail Price | Unit Growth Vs. YAGO | Dollar Growth Vs. YAGO | Positioning Group |
|-------------------|----------------------|------------------------|-------------------------------|
| \$3.76 | -0.3% | +2.2% | Total Food |
| \$4.58 | +4.5% | +7.3% | NATURAL PRODUCTS |
| \$4.20 | +2.3% | +4.9% | SPECIALTY & WELLNESS PRODUCTS |
| \$3.58 | -1.3% | 0.8% | CONVENTIONAL PRODUCTS |

New product innovation has slowed





2026 TRENDS PREDICTIONS

Private label: An engine of growth



Private label has become a staple in virtually every household, accounting for over a quarter of all units sold.



Future growth is fueled by younger and more affluent consumers who are increasingly turning to private label products



100%

Private Label Household Penetration



+22%

Gen Z Household Buyers



+4%

High income shopper trips that include private label vs YAGO



+6%

Gen Z shopping trips that include private label vs YAGO

2026 TRENDS PREDICTIONS

Premium benefits for less

Today's customers expect more from the private brands they purchase – they want affordable, quality products to elevate their overall food experience

- **Scott Morris**,
Senior Vice President, Private Brands, Food and Consumables, Walmart.



Premium attributes



\$14⁹⁹



\$10⁹⁹

\$0.55/per each



\$3⁴⁹

\$0.44/ounce



\$4⁹⁹

\$0.55/ounce

Tiered offerings



\$1⁹⁹

\$0.08/oz



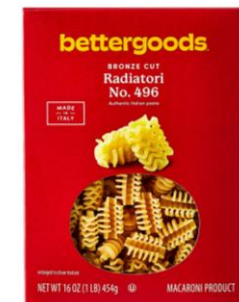
\$2⁷⁹

\$0.12/oz



\$0⁹⁸

6.1¢/oz/



\$2¹⁴

13.4¢/oz



2026 TRENDS PREDICTIONS

Premium without the price tag

In the constant tradeoff between price and quality, private label is poised to win in the premium and functional segments once dominated by brands.

Tightening Budgets

+3.1% Consumer Price Index for Food

+3.8% Median Monthly Homeownership Costs

+1.3% Median Household Income

+

Demand for Premium

#1

Reason consumer say it is hard to eat healthier food is **cost**

=

Private Label's Rise



Diet Culture

Consumer preferences are changing
the way people are eating

2026 TRENDS PREDICTIONS

Unpacking influence



Diet culture

Influence

Generation

Current Diet



01 Taste & Price



vs.

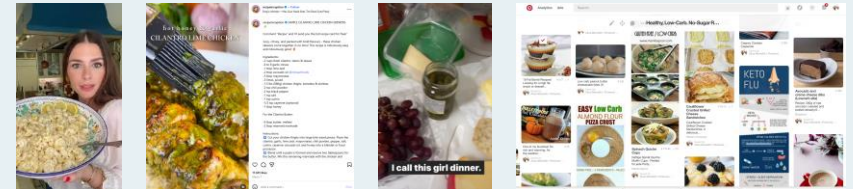


#1 Gen Z & Millennials Consideration Of Retail Location¹: **Price**

02 Health & Wellness

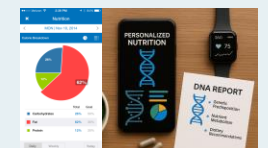
64% of Millennials, 56% of Gen Z & 46% Boomers put a good to a lot of effort into making health eating choices¹.

03 Social Media



04 Personalization & Technology

~90% of Gen Z & Millennials are actively looking to avoid using or consuming certain ingredients².



1. SPINS The Next Generation of Consumers “When deciding where to shop for a product, how often does price influence your choice of retailer?”

2. SPINS/FMI Healthy Eating Study

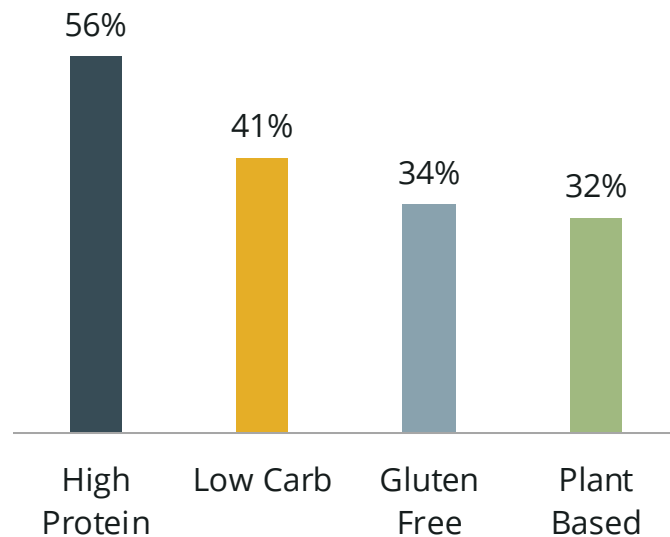


2026 TRENDS PREDICTIONS

Younger Millennials & Gen Z integrating wellness trends within their diets.

Millennials & Gen Z:

~40% follow a specific diet¹



Top Ingredients Younger Shoppers Actively Avoid + Key Categories¹

High Fructose Corn Syrup



Artificial Sweeteners



- Snack
- Confectionary
- Beverage

Sugar Alcohols



Dinnertime, **Fast Forwarded**

73%

Of Gen Z have a gym membership³

64%

Of adults eat dinner at 5 or 6pm²

53%

Of Gen Z had interest in earlier dinner reservations in 2025³

¹ Do you follow any of the following dietary restrictions?, "Within each of the following categories, are there any ingredients you are actively looking to avoid using or consuming?" SPINS TriLens Panel (Powered by Circana),

² <https://www.asphaltgreen.org/blog/why-gen-z-and-millennials-love-gyms-and-sports-clubs/>

³ <https://www.yahoo.com/lifestyle/articles/five-o-clock-dinner-crowd-130045941.html>



2026 TRENDS PREDICTIONS

What's here?

Injectables: Beyond A Quick Fix^{1,2}

12% Of adults have taken an injection for weight loss

17% Boomer's inject rates vs. 7-10% of Gen Z & Millennials

+85% Gen Alpha's increased use in 24', followed by Gen Z (+68%)

Liquid Diets & Snacks



FZ Breakfast Meals



RF RTD Coffee-Cold Brew



Chips, Pretzels & Snacks



Energy Drinks

| | | | | |
|---|------------|------------|------------|-------------|
| \$ % Chg vs YA ³ | -9% | +5% | -1% | +17% |
| % of \$ From Gen Z + Millennials ⁴ | 37% | 47% | 34% | 56% |

Younger Snacking Attitudes^{5,6}:

- Favor drinkable snacks- mainly carbonated drinks & juices
- More likely to replace meals than Gen X or Boomers
- Functionality to support convenience, energy, productivity and work-life balance

Sources: 1. <https://news.gallup.com/poll/696599/obesity-rate-declining.asp>

2. <https://www.evernorth.com/sites/default/files/2025-03/2025-pharmacy-in-focus-report.pdf>

3. SPINS Natural Channel+ MULO (powered by Circana), Grocery, Refrigerated, Frozen, VMS Product Type, 52 Weeks Ending 11.30.2025

4. SPINS All Outlet Panel Data (powered by Circana), Total US All Outlets, 52 Weeks Ending 11.2.2025

5. <https://www.innovamarketinginsights.com/trends/consumer-attitudes-to-ward-snacking/>

6. <https://www.foodnavigator-usa.com/Article/2025/10/08/younger-consumers-look-for-energy-older-counterparts-prioritize-preventative-care/>



2026 TRENDS PREDICTIONS

Future forward

Funky Fermentations



Turning fermented, pickled & naturally preserved foods into everyday staples vs. side-dish afterthoughts.



+5%

Sauerkraut¹

\$96.7M In Sales



+8%

Kimchi¹

\$67.1M In Sales

Intentional Indulgences Pint vs “Biggie”¹

\$ % Change



6%

5%

-1%

-2%

14oz

16oz

46oz

48oz

Base ARP

\$5.46

\$5.22

\$4.68

\$4.87

“Little Treat” Culture



62% of Americans consider “treats” as part of their self-care routine.²

Whole Foods

Ingredients ranked the most important part of product labels to ***all age groups***³

\$ % Change

+12%

Whole Pumpkin



-4%

Artificial Colors

+9%

Whole Kale



-3%

Artificial Preservatives

+6%

Whole Sweet Potato



-2%

Artificial Flavors

Global Flavors and the Return to Real

The modern kitchen has evolved



2026 TRENDS PREDICTIONS

Global flavor wave: still surfing

Buoyed by favorable demographics and an audience ready to adopt, international flavors continue to expand, evolve and inspire, regardless of (or in part because of) price points.



DEMOGRAPHIC DRIVERS

- Most common non-English languages spoken in U.S. households:
 - Spanish
 - Chinese (Mandarin, Cantonese)
 - Tagalog (Filipino).
- Korean restaurants in U.S. grew +10% in 2024 alone.
- Bao Bun sales +45% in UK



BRAND EVOLUTION

- Dumpling and single-type brands now confidently expanding into new categories



STATUS SAUCES

- Premium-positioned condiments featuring global flavors have become a new social marker and pantry must-have.



PRIVATE LABEL JOINS IN

- Retailers are capitalizing on the trend, rolling out store brand versions of popular global product types.





2026 TRENDS PREDICTIONS

Beyond Belief: Rising Demand

Nearly half of Americans choose kosher labels for added quality assurance, mirroring a global shift toward greater transparency, quality, and food safety.¹

2024 Halal & Kosher Sales²³

| | |
|--|--|
| <p>+9.7% Predicted CAGR 2025-2033</p> | <p>+2.9% Predicted CAGR 2025-2033</p> |
| Halal | Kosher |

Clean Labeling & Broad Appeal Have Big Potential

What's The Difference? ⁴

Moderate – Very High

←

→

| | Halal (M) | Kosher (K) |
|-------------------------------|-----------|------------|
| Transparency | | |
| Food Safety | | |
| Ethical Treatment | | |
| Additive/Processing Awareness | | |
| Plant Based Alignment | | |
| Socially Consciousness | | |

Retail & Brands Are All In

How Manischewitz's Rebrand Targets 'Culturally Curious' Younger Customers

New Jersey ShopRite location debuts sharply expanded kosher department

Feastables chocolate goes kosher. Should yours?

Top Halal & Kosher Certifications

1. <https://www.globalgrowthinsights.com/market-reports/kosher-food-market-101843>

2. https://www.imarcgroup.com/united-states-halal-food-market?utm_source=chatgpt.com

3. https://www.imarcgroup.com/united-states-kosher-food-market?utm_source=chatgpt.com

4. Qur'an; Hadith; Talmud; USDA FSIS; Codex CAC/GL 24-1997; IFANCA; HFSAA; OU Kosher; Star-K; OK Kosher; Kof-K; AVMA; Pew Research Center



2026 TRENDS PREDICTIONS

On the horizon

All Things Protein & Functional

Gen Z & Millennials over-index in spend on **protein & functional** ingredients¹

Protein Trend Performance

Unit % Chg²

+51%

Added Chickpea Protein

+55%

Whey & Casein

-5%

Added Soy Protein

-41%

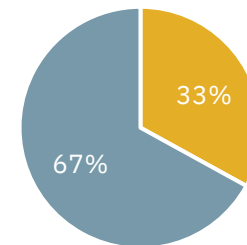
Added Chia Protein

Seedy Business: Moving On

Seed Oil Food & Bev²

Unit Contribution

■ Contains Seed Oils ■ No Seed Oils



| | Seed Oil | No Seed Oil |
|---------------|----------|-------------|
| Base ARP | \$4.32 | \$4.30 |
| \$ % Change | -5% | +1% |
| Unit % Change | -5% | -2% |

Units

| Soybean Oil | Canola Oil | Sunflower Oil | Corn Oil |
|-------------|------------|---------------|----------|
| 28B | 17B | 10B | 5B |
| -5% | -5% | -5% | -7% |

No Artificial Ingredients

Behind protein and sugar, no artificial ingredients is the third most sought after claim by shoppers³

Products With No Artificial Ingredients, By Category

Units % Chg. Vital Clean²

| | |
|--------------------|-------------|
| SS Rice Cakes | +23% |
| FZ Breakfast Foods | +17% |
| SS Jerky & Meats | +16% |
| RF & PB Yogurt | +10% |
| Creams Creamers | +7% |

Sources: 1. SPINS TriLens Panel (Powered by Circana), Total US All Outlets, 52 weeks ending 06/15/2025

2. SPINS Natural Channel+ MULO (powered by Circana), Grocery, Refrigerated, Frozen Departments 52 Weeks Ending 11.30.2025

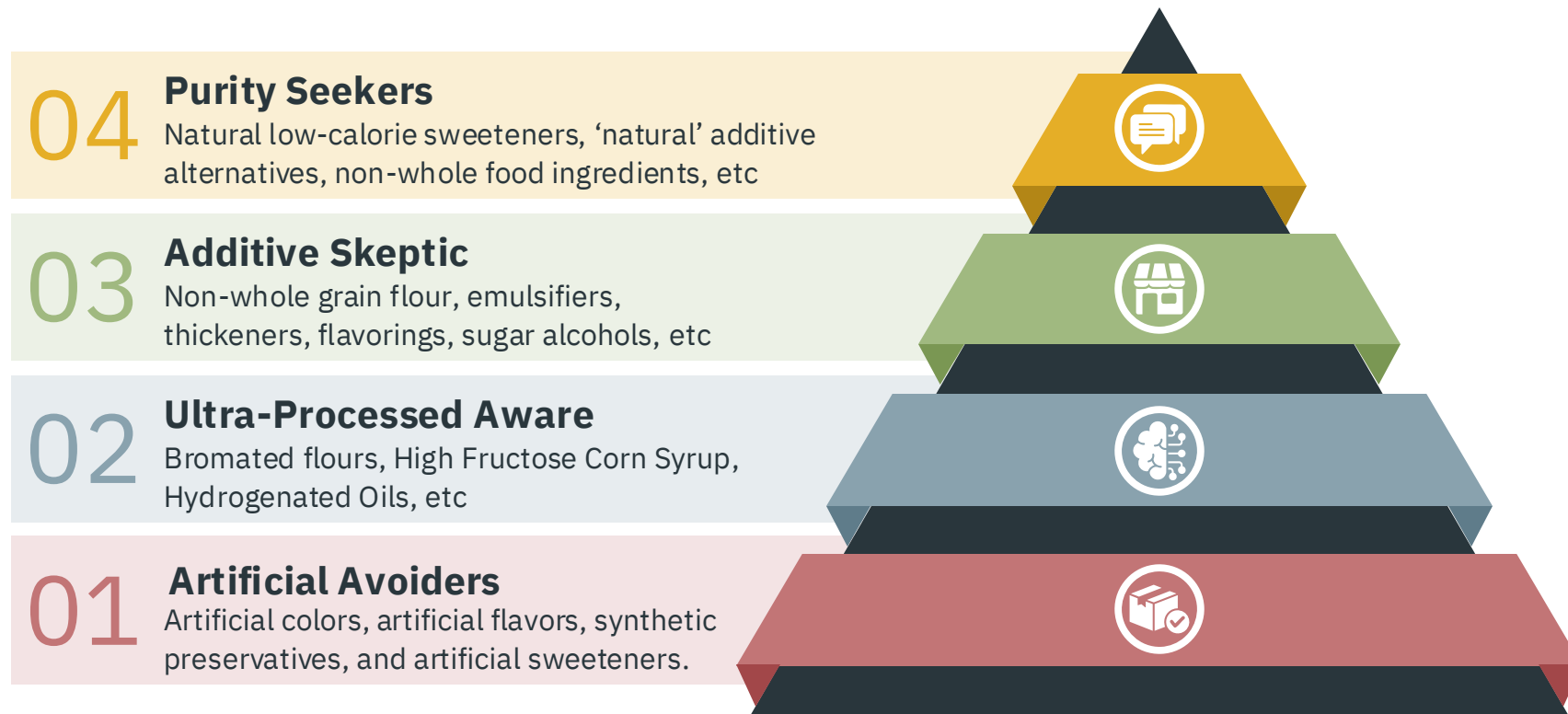
3. SPINS/FMI Healthy Eating Study



2026 TRENDS PREDICTIONS

Not all additives are created equal

Shoppers will not approach ultra-processed avoidance the exact same way. Consumer awareness varies but with ultra-processed concepts becoming more mainstream, it's important to understand it's a layered topic and not all additives will be approached equally. Looks for brands to create significant differentiation in the market via this concept.



Nutrient Density

Protein, Fiber, and new perspectives on macros' role in a balanced diet.



2026 TRENDS PREDICTIONS

Peak Protein: Twin Drivers of a New Boom

GLP-1 Compensation

Smaller portions require higher nutrient density



\$2.0B | 25.3% Meat Snacks

\$1.9B | +22.1% RF Yogurt Drinks



\$2.0B | +20.1% Cottage Cheese

\$5.6B | +10.3% Liq. Meal Replacement



Aspirational Fitness

Nutrient dense* snacking = healthy living?



Salty Snacks
+16%

Sports Drinks
+209%

Wellness Bars
15%

Cookies
+23%



Pasta Sauce
+1,222%



Ice Cream
+4,404%

*sales where protein content was > 20g

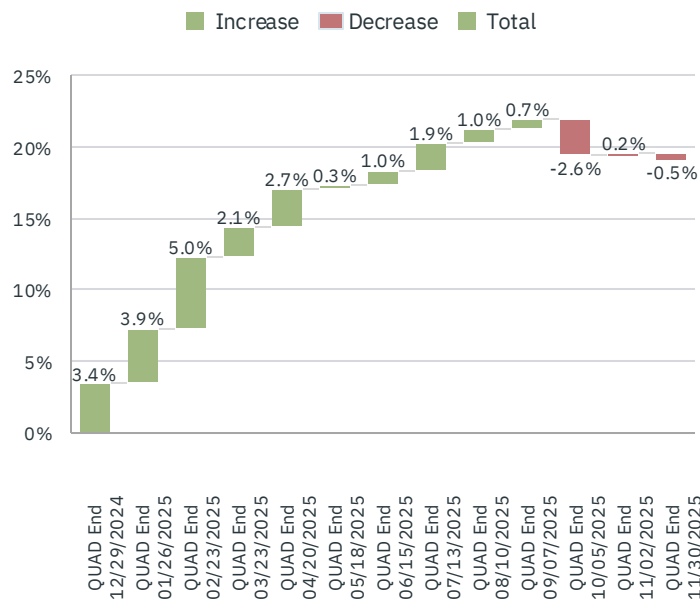


2026 TRENDS PREDICTIONS

Fiber on the Rise

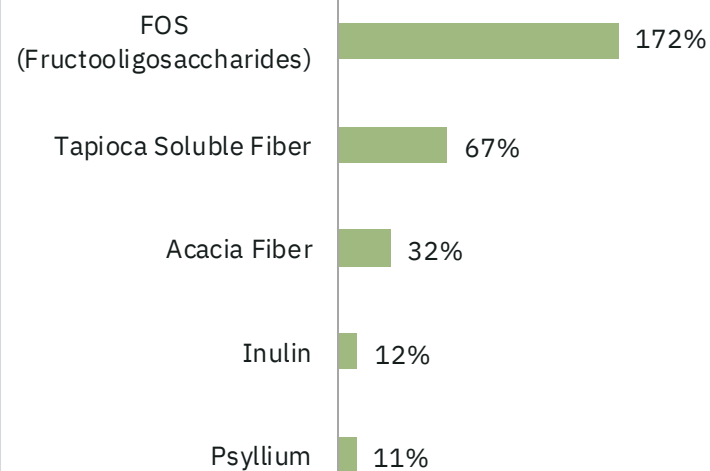
Protein may dominate headlines, but fiber is the real gap in American diets- and brands are starting to respond

Product Sales designated FDA-High Fiber, L52 weeks



Fiber Maxxing

Food & Bev Fiber Types¹ Top Unit % Growth



FDA-denoted High Fiber products are growing in the usual places...



708%
SUPPLEMENTS



85%
BREAKFAST FOODS

...as well as new areas of penetration



70%
RTD TEA & COFFEE



29%
SODA

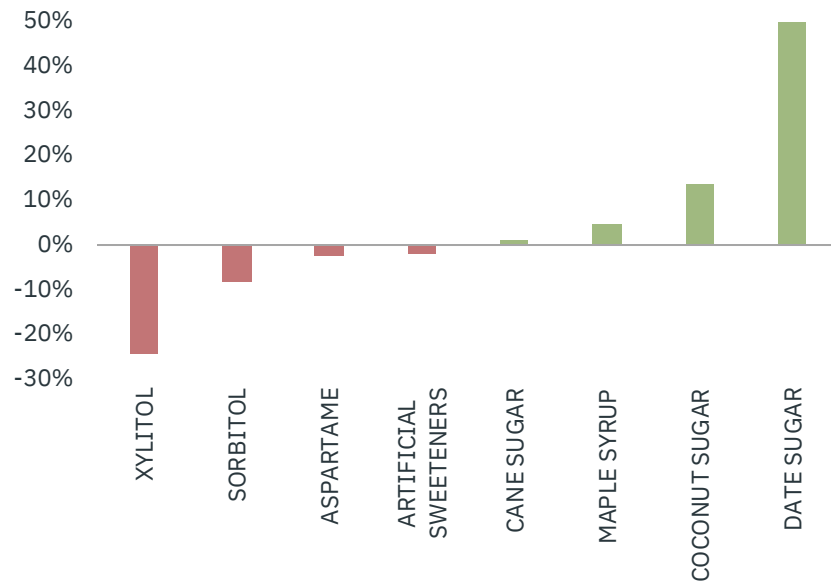


2026 TRENDS PREDICTIONS

Too Sweet?

A combination of new converts to the Clean Label movement and a decrease in cravings from GLP-1 users has shined a stronger light on sweeteners used in Food & Beverage.

Sweetener Unit Sales, % Chg, Yago



Base Category

Unit Sales Growth

| | |
|--------------------|-------|
| Pudding & Gelatin | -3.7% |
| Nut & Seed Butters | -3.6% |
| Juices | -3.7% |
| Baking Ingredients | -1.3% |

Sugar-Free Category

Unit Sales Growth

| | |
|--------------------|-------|
| Pudding & Gelatin | 6.2% |
| Nut & Seed Butters | 24.0% |
| Juices | 3.3% |
| Baking Ingredients | 7.4% |



2026 TRENDS PREDICTIONS

2026 Predictions for Macronutrients

01

Sugar, naturalized.

Mindful sweetener intake favoring natural sources and overall decreased volume



02

Protein as a Pure Play.

Less gimmick snacks, more 'classic' categories like animal meat, dairy, and beans.



03

Fiber Fully Appreciated.

Concerted brand marketing pivot from protein excess toward real fiber deficiencies.



04

Honest Adoption.

Decreased maxxing, increased focus on properly balancing diet + RDA needs.



Functional Ingredients

What ingredients will trend in 2026?



2026 TRENDS PREDICTIONS

Linking Functional Foods & Ingredients To **Health Trends**

What Health Trends to watch in 2026



Healthy Aging



GLP-1 Support



**Personalized
Nutrition & Risk-
Factor Targeting**



**Superfoods &
Whole Food
Supplements**



2026 TRENDS PREDICTIONS

Building Resilience For Longevity

Cellular Health



Selenium
\$24.1M | +33.6%



Muscle & Bone Health



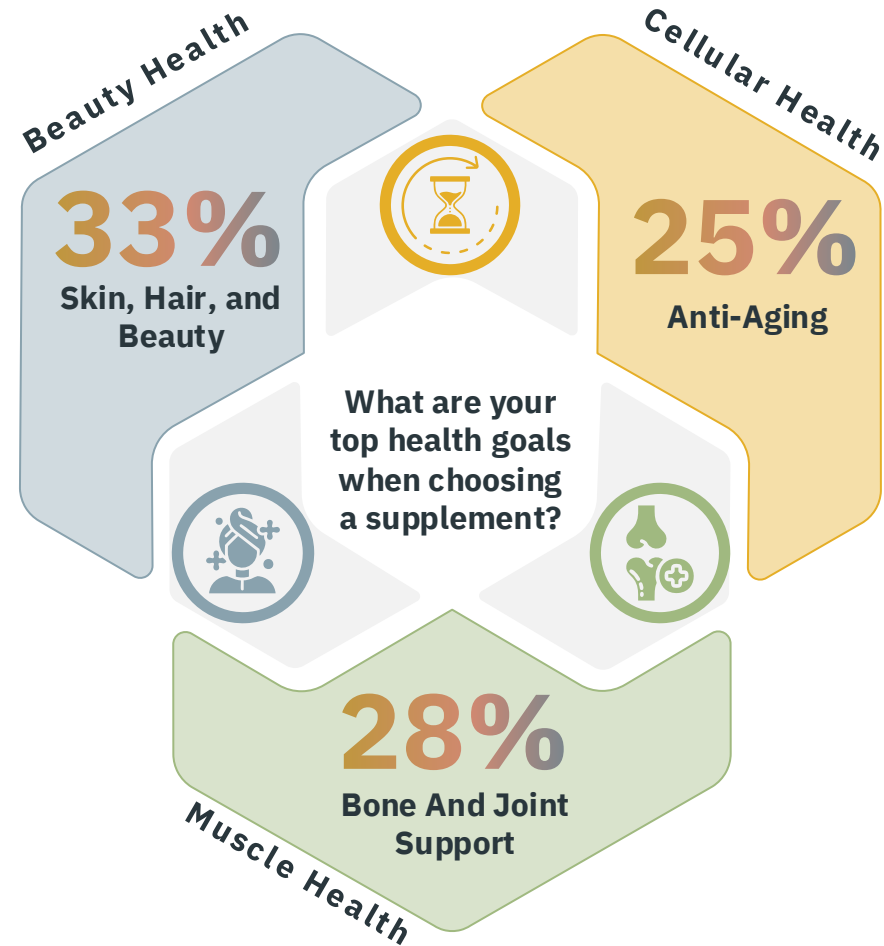
Vitamin A-D-K
\$1158.7M | +11.5%



Beauty Health



Inositol
\$54.4M | +7.3%



Source: SPINS Natural Channel + Multi-Outlet (MULO) (Powered by Circana) + SPINS Amazon Market Measurement (Powered by Stackline)

Dept: Vitamins & Supplements, Subcategory: Vit A-D-K, Functional Ingredients, 52 Weeks Ending 11/30/25

VMS Attitude & Usage Survey, N = 1,000 VMS Shoppers; Fielded May 9th – 21st, 2025, Survey Run Independent From Sales Data Trending Ingredients

*Question: What are your top health goals when choosing a supplement?



2026 TRENDS PREDICTIONS

Potential Breakout Ingredients In 2026

Knowing what shoppers are looking for in **supplements** helps unlock cross-over potential and formulation considerations

What's Fading?

- ✓ Weight Loss
- ✓ Cleanse & Detox
- ✓ Cold & Flu
- ✓ Joint Health
- ✓ Allergy & Respiratory Health

What's Breaking Through?

- ✓ Mood Support
- ✓ Hangover Remedies
- ✓ Liver Support
- ✓ Longevity & Healthy Aging
- ✓ GLP-1 Boost/Support

Sea Moss

Known For:
Nutrient Density; Gut Health;
Weight Management

\$52.9M | +207.8%

Shilajit

Known For:
Cognitive Health, Energy,
Muscle Recovery

\$13.9M | +80.4%

Colostrum

Known For:
Gut Health, Immune Health

\$32.3M | +784.9%

Saffron

Known For:
Mood Support; Cognitive
Health; Menopause

\$2.7M | +175.7%

Acetyl L-Carnitine

Known For:
Energy Support; Weight
Management

\$16.7m | +128.1%

NMN

Known For:
Healthy Aging; Cellular Health;
Cognitive Health

\$0.3M | +179.1%



2026 TRENDS PREDICTIONS

Stress & Mood Support

Look for Supplements, Ingredients, and Foods that Support Stress & Mood to Continue to Prosper in 2026 as the population, especially younger generations, continues to experience a rise in stress and anxiety

Popular Mood & Stress Ingredients In Supplements:

| | |
|--------------------|-----------------|
| Ashwagandha | \$197M +24.7% |
| Magnesium | \$453M +17.1% |
| GABA | \$39M +15.3% |
| Theanine | \$48M +164.0% |
| Vitamin D | \$444M -4.5% |
| Kava | \$8.2M -3.8% |

What's Next?

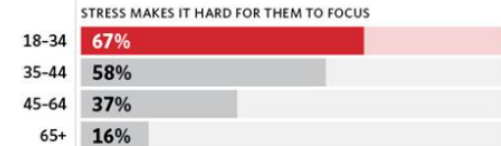
Saffron is up-and-coming mood balancer and serotonin booster that continues to show promise in mood support formulations.

76% Of adults reported stress as having an impact on their health

\$41M | +8%

Wellness Tea – Stress/Relaxation

Younger Adults Report Effects Of Stress The Most



Other areas in Food & Bev where products are sought after for their mood & stress support properties

+52%
Soda

+61%
RTD Water

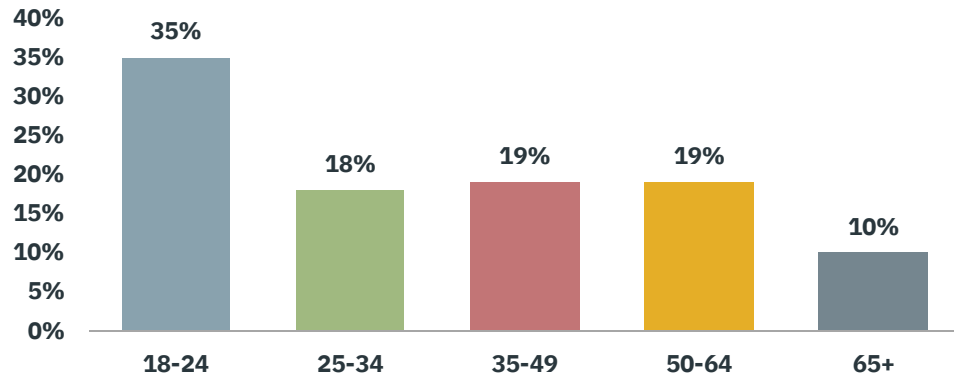
+33%
Kombucha & Other Func. Bev.

2026 TRENDS PREDICTIONS

Mind Over Matter – Cognitive Health Evolved

Brain health is expanding from memory support to everyday focus, mood, and stress resilience. Shoppers, especially younger ones, are seeking ingredients like **magnesium L-threonate, citicoline, L-theanine, ashwagandha, and lion's mane** in convenient food and beverage formats, making cognitive wellness a cross-category growth driver.

Top Health Goal: Mental Clarity & Focus by Age Group ¹



Functionality

Stress

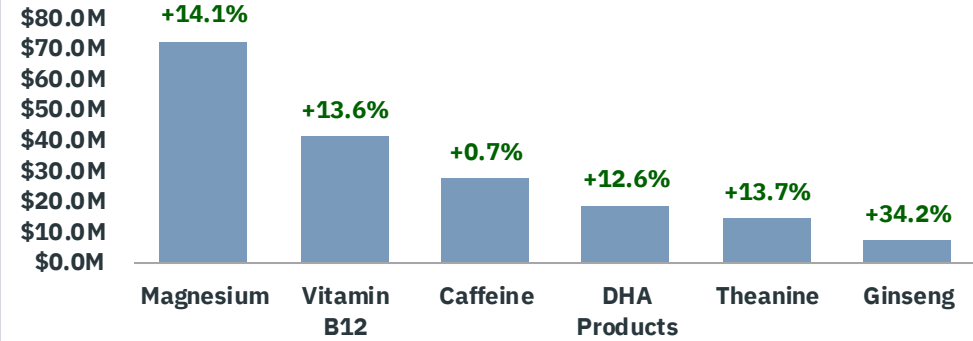
Cognitive health

Whole health



Functionality In Perspective

Cognitive Health Focus By Functional Ingredient
Dollars, Dol % Chg



Creatine + Cognitive Health Headlines

SupplySide[®] Supplement Journal ²

This scientific flywheel has translated into an ever-growing body of research with positive results. Creatine may **benefit** women's health, including issues related to menopause. It's been **linked** to favorable effects on aging muscle, bone and fat mass in healthy older adults. And it's **shown** potential to improve cognitive function, especially when a brain creatine deficit has been brought on by acute stressors like sleep deprivation or chronic conditions such as mild traumatic brain injury, Alzheimer's disease or depression.



Creatine \$627.4M | +77.6%

Will brands lean more heavily on cognitive health messaging in 2026?

Source: SPINS Natural Channel + Multi-Outlet (MULO) (Powered by Circana) + SPINS Amazon Market Measurement (Powered by Stackline)
Dept: Vitamins & Supplements, Functional Ingredients, 52 Weeks Ending 11/30/25

1: VMS Attitude & Usage Survey, N = 1,000 VMS Consumers; Fielded May 9th – 21st, 2025, Survey Run Independent From Sales Data
"What are your top health goals when choosing a supplement? By Age Demographic"

2: <https://www.supplysidesj.com/market-trends-analysis/10-emerging-supplement-trends-2026>



2026 TRENDS PREDICTIONS

Some key ingredients & products tout many health benefits and “the only supplement you need”

Colostrum

#colostrum

79.4K posts

on TikTok



Immunity, Gut Health, & Recovery



GLP-1 Support



Immunity, Gut Health, & Beauty



Sea Moss

#seamoss

457.6K posts

on TikTok



Beauty



Immunity, Energy, Gut Health



Immunity





2026 TRENDS PREDICTIONS

Modern Soda Diversification & Impact

Look for 2 core impacts from the 2025's banner Modern Soda year.

- Diversification of **Health Focus** and **Functional Ingredients** within **Modern Soda**
- Brands attempting to **replicate** Modern Soda's success in other Categories.



Protein Soda



Adaptogenic Soda



Prebiotic Tea

Health Focus

\$ %Chg in Beverages

Digestive Health **+19%**

Mood Support **+46%**

Immune Support* **+21%**

Functional Ingredients To Watch

- Paraxanthine
- L-Theanine
- Clear Protein



2026 TRENDS PREDICTIONS

Next-Gen Nutrition: Personalized Health For Every Cell

AI, Wearables & Health Tracking



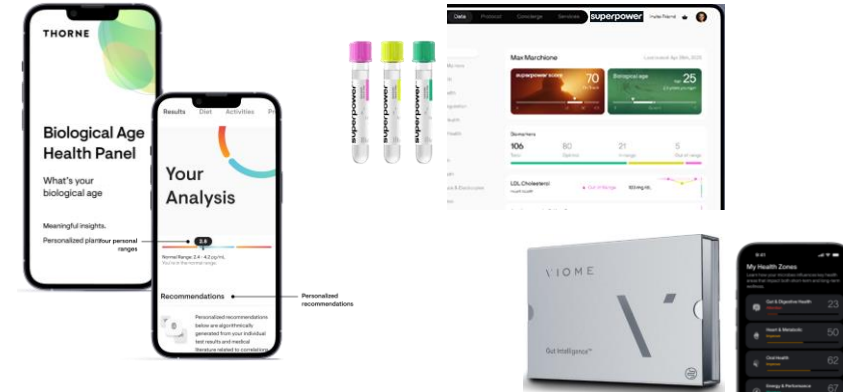
- Hypertension
- Sleep Score
- Heart Rate
- Vitals/ECG
- Blood Oxygen
- Cycle tracking
- Activity/Workout
- Wrist Temperature
- Antioxidant Index

15%

of Gen Z and Millennials are turning to AI tools for product learning, with 11% ranking AI chatbots among their top discovery methods.¹

AI + wearables help shoppers **optimize sleep, stress, and recovery**, supporting proactive **cellular health and longevity**.

Advances in Testing for Precision Nutrition



41%

of consumers remain unaware of the gut microbiome, and 50% don't realize it can impact gut health²

Advances in biomarker testing is guiding precision nutrition for **inflammation, muscle preservation, and early cognitive support**.

Pictures from respective sites:

<https://www.samsungmobilepress.com/feature-stories/great-health-can-happen-over-night-with-galaxy-watch>

<https://www.apple.com/newsroom/2025/09/apple-debuts-apple-watch-series-11-features-groundbreaking-health-insights/>

1: July 2025 SPINS survey of total U.S. Gen Z and Millennial shoppers aged 13-44 (n = 1000)

"Which websites or social media platforms do you typically use to learn about new products?, How do you typically discover new products?"

2: <https://www.preparedfoods.com/articles/130753-danone-survey-reveals-gut-health-awareness-grows-but-key-knowledge-gaps-persist>



Thank You!

CONTACT US AT GROWTH@SPINS.COM