



2025

EXPO 2025 TREND CHECK: WHAT'S BUZZING — AND BACKED BY THE NUMBERS

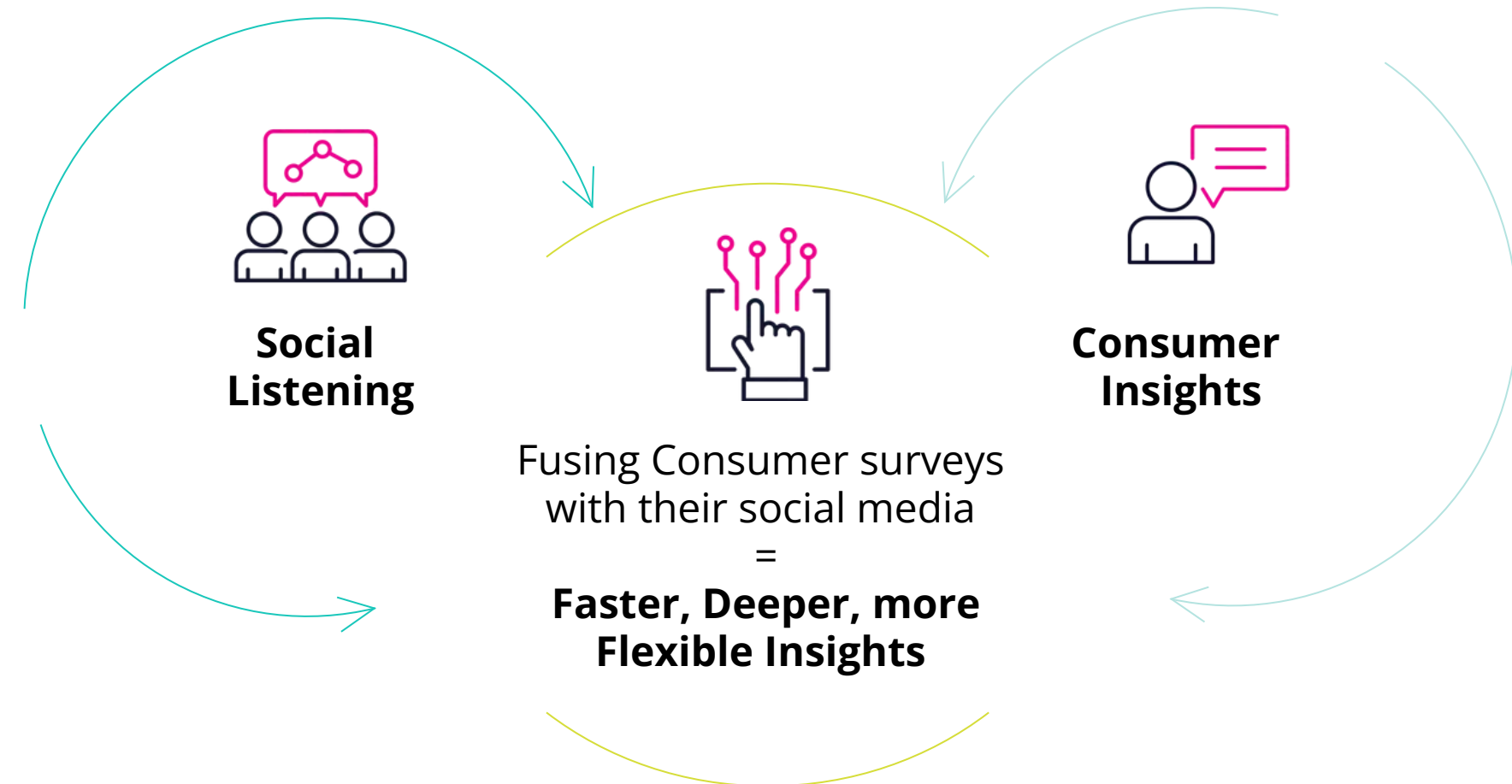
What's Next in Wellness Webinar Series
Based on Q1 2025 Data

WELLNESS CPG STUDY

Surveys + Social: The Brightfield Difference

Brightfield Group's AI-Driven consumer insights empowers marketers and product developers to innovate & brand with confidence.

Ignite Your Innovation Journey with AI-Driven Consumer Insights



Wellness CPG Study: Consumer Insights + Social Listening Dashboard

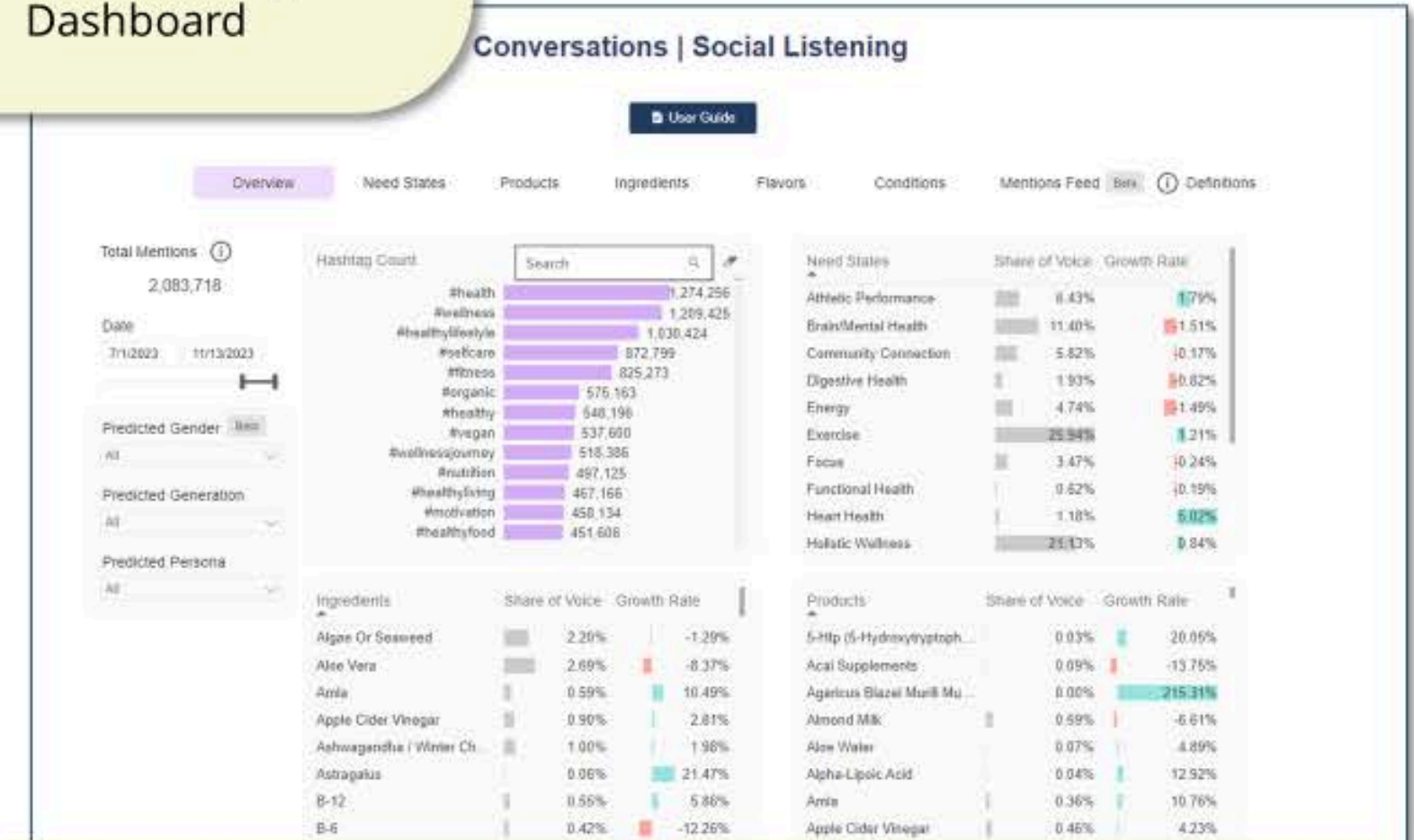
AI-Driven Consumer Insights Dashboard



Comprehensive Consumer Insights

- Quarterly Survey of 5,000+ US Adult Consumers
- Census-Balanced & Unique consumers each quarter to allow combining of quarters for higher sample size
- Survey includes robust Behavioral, Attitudinal, Lifestyle insights & product usage for over 150 categories
- Segmentation developed to explore by consumer attitudes and priorities

Social Listening Dashboard



Forward-Looking Social Listening

- Total conversations spanning 20 million+ mentions of keywords associated with wellness from Twitter(X), Instagram, TikTok – updated weekly
- Pre-trained Dimensions capture conversations about Conditions, Need States, Products, Sub-Products, Flavors and Ingredients
- Verbatim mentions link to actual post to explore context & posters
- AI-Trained Persona Predictions allow filtering by Gender, Age, Persona

Today's Agenda

**Natural
Products**
EXPO WEST®
Expo West Recap

How do the trends stack up in the data?



As Always: Samples Samples Everywhere!!

Caveats and Comments

- Snapshot of what we saw and tasted (couldn't see/taste everything!)
- Agree with other Expo recaps which have highlighted similar themes of less “groundbreaking” innovation (e.g. plant-based seafood) and more “iterations on traditional”

Day 1 Haul





HYDRATION: WE THOUGHT THAT IT WAS FIZZLING OUT

We thought hydration was peaking in late 2023

From our webinar in early 2024

In 2020 the New York Times proclaimed,
“Everyone’s resolution is to drink more
water,” viewing hydration as a health and
wellness panacea.

TIME

STANLEY’S TARGET COLLABORATION SPARKS IN- STORE AND SOCIAL MEDIA FRENZY

Stanley is trending again following the recent release of a Valentine's Day collaboration with Target

By Adrienne Pasquarelli, Published on January 03, 2024.



Shoppers flocked to Target for the new Valentine's Day collection. Credit: TikTok

August 2023

The New York Times

According to TikTok, Americans Are Very, Very Thirsty

Drinking water is impossible to come by in Europe — or so goes a complaint on social media. Well-hydrated Europeans have responded with eye rolls from every corner of the continent.



thrillist

CITIES + NEWS TRAVEL EAT DRINK

DRINK + WATER

Why Are Americans So Thirsty?

Diving into why water culture is vastly different in the United States versus the rest of the world.

By Tom Burson
Published on 8/29/2023 at 11:21 PM





Hydration continued to grow and now seems saturated

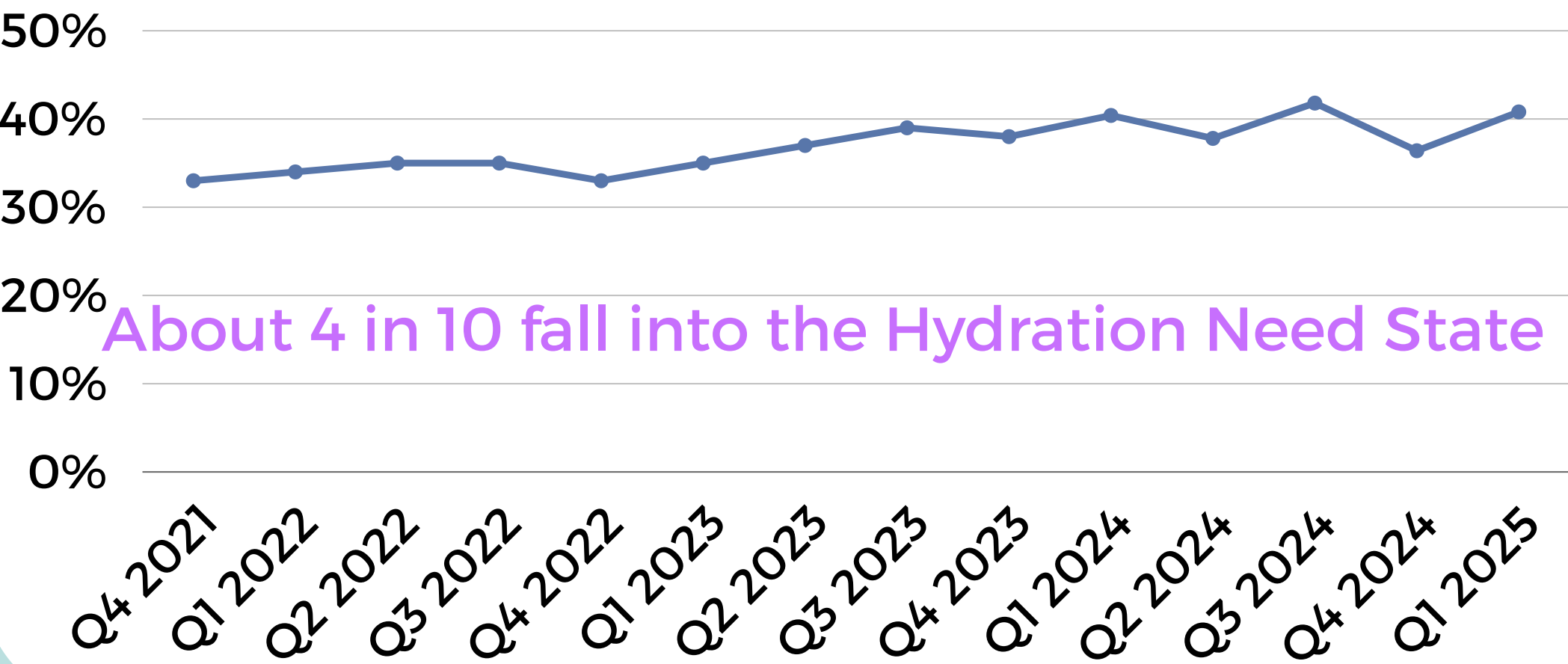
Countless “Hydration” focused powders and beverages... almost felt like overload. The trend this year was how hydration is not enough, and the products were often pairing hydration with another benefit/ingredient.

78% of US Adults agree with the statement “I am focused on staying hydrated”



Hydration + ?

% of Consumers who are in the Hydration Need State



About 4 in 10 fall into the Hydration Need State

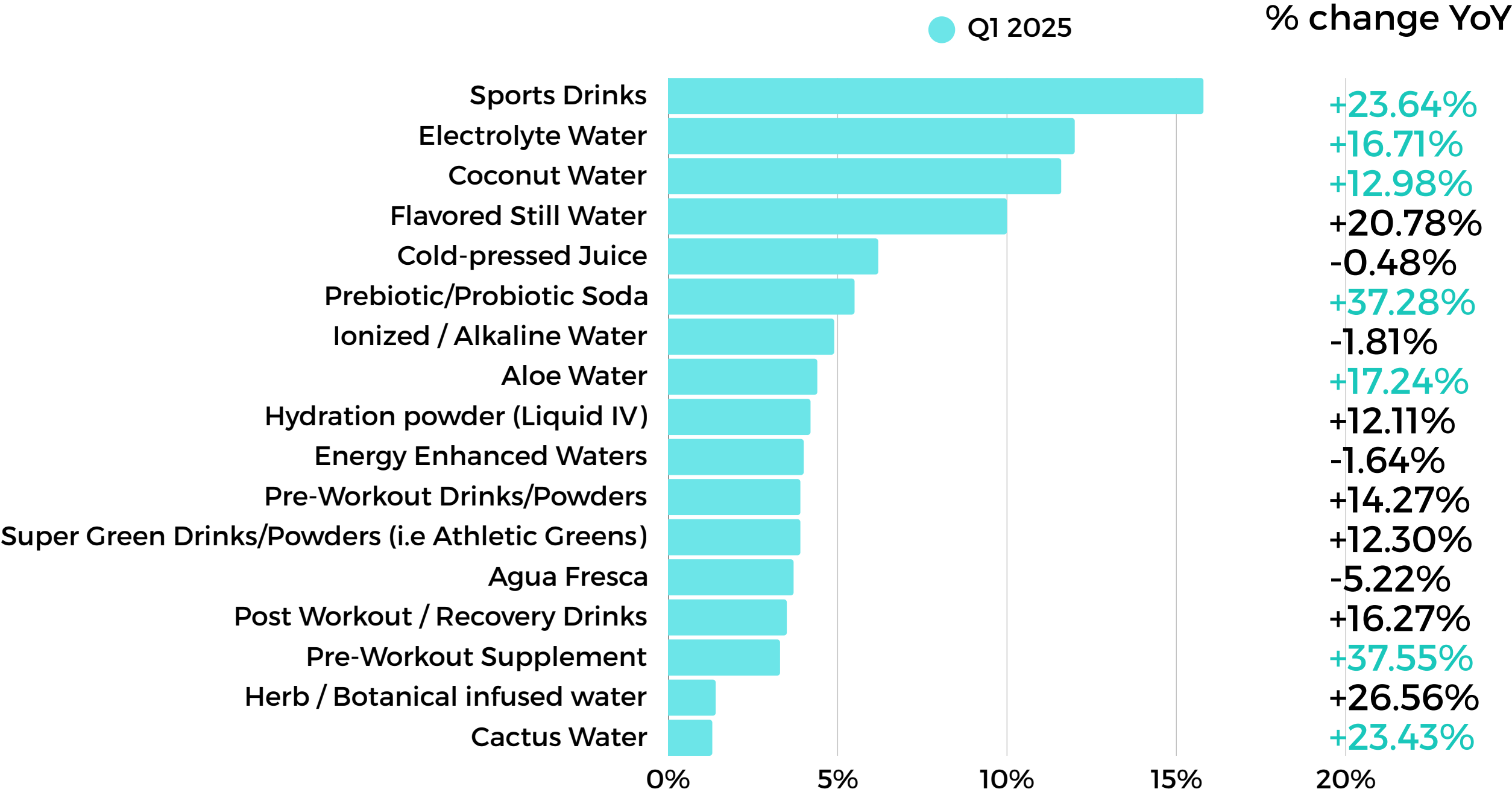




Hydration

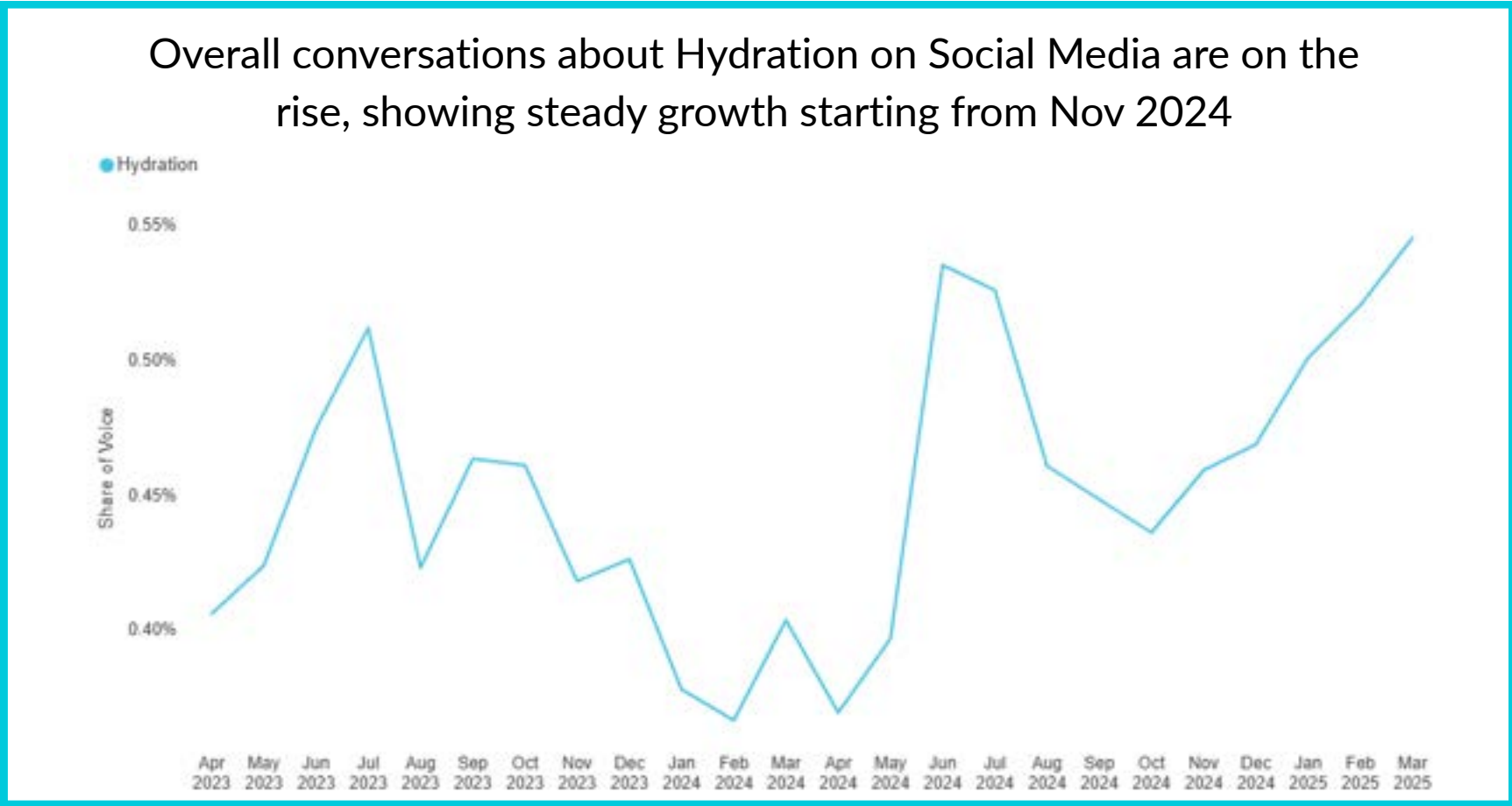
Consumers are also increasingly reporting the purchase of hydration related products, notably Sports Drinks, Electrolyte Waters, and Coconut Water

Consumer reported Purchase (P3M) of Hydration products

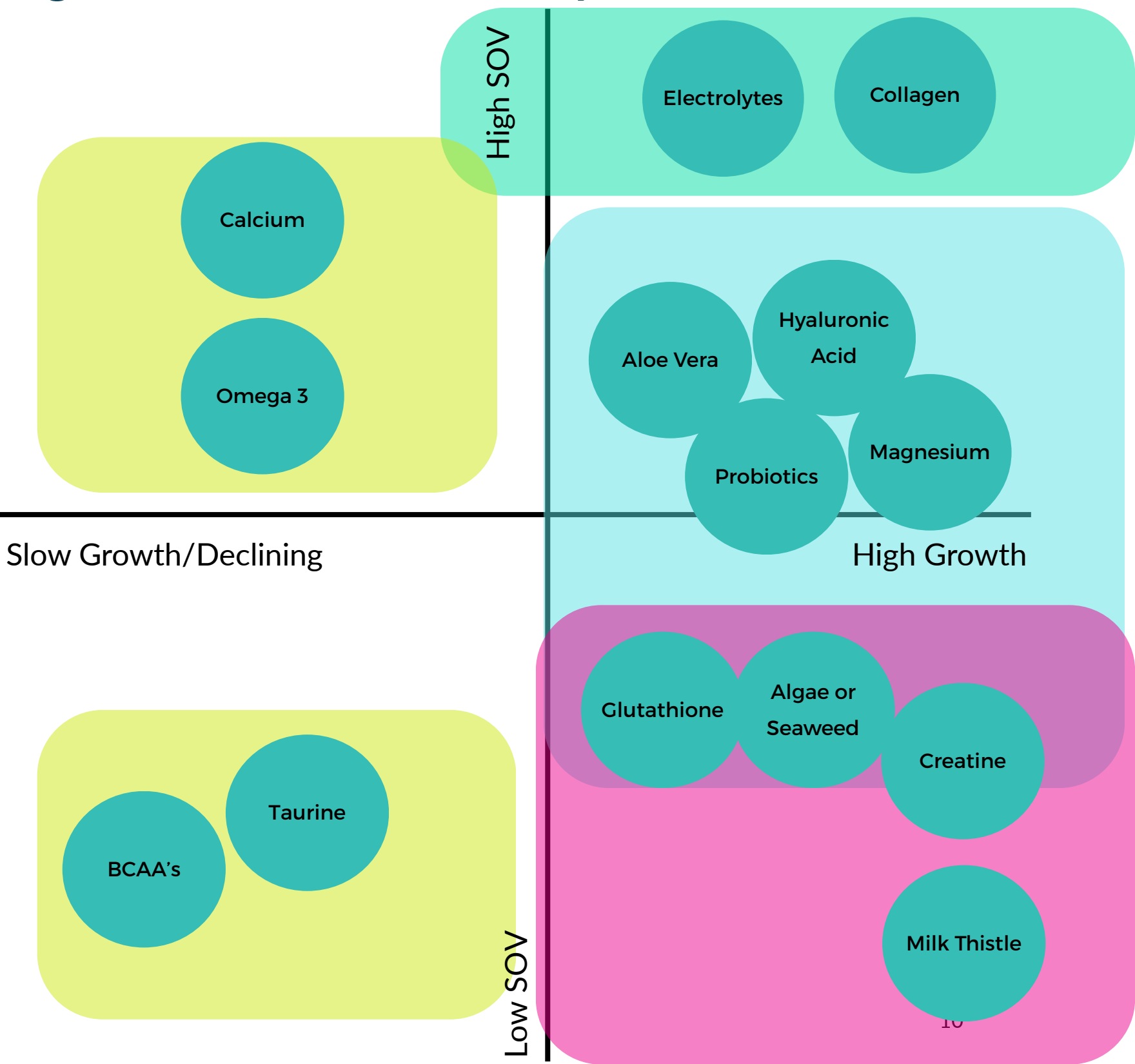


Source: Brightfield Group; Wellness Consumer Insights; Q1 2025

Hydration + Ingredients: Where to go from here? Finding Innovation Opportunities in Social Conversations



Ingredient Mentions in Hydration Conversations



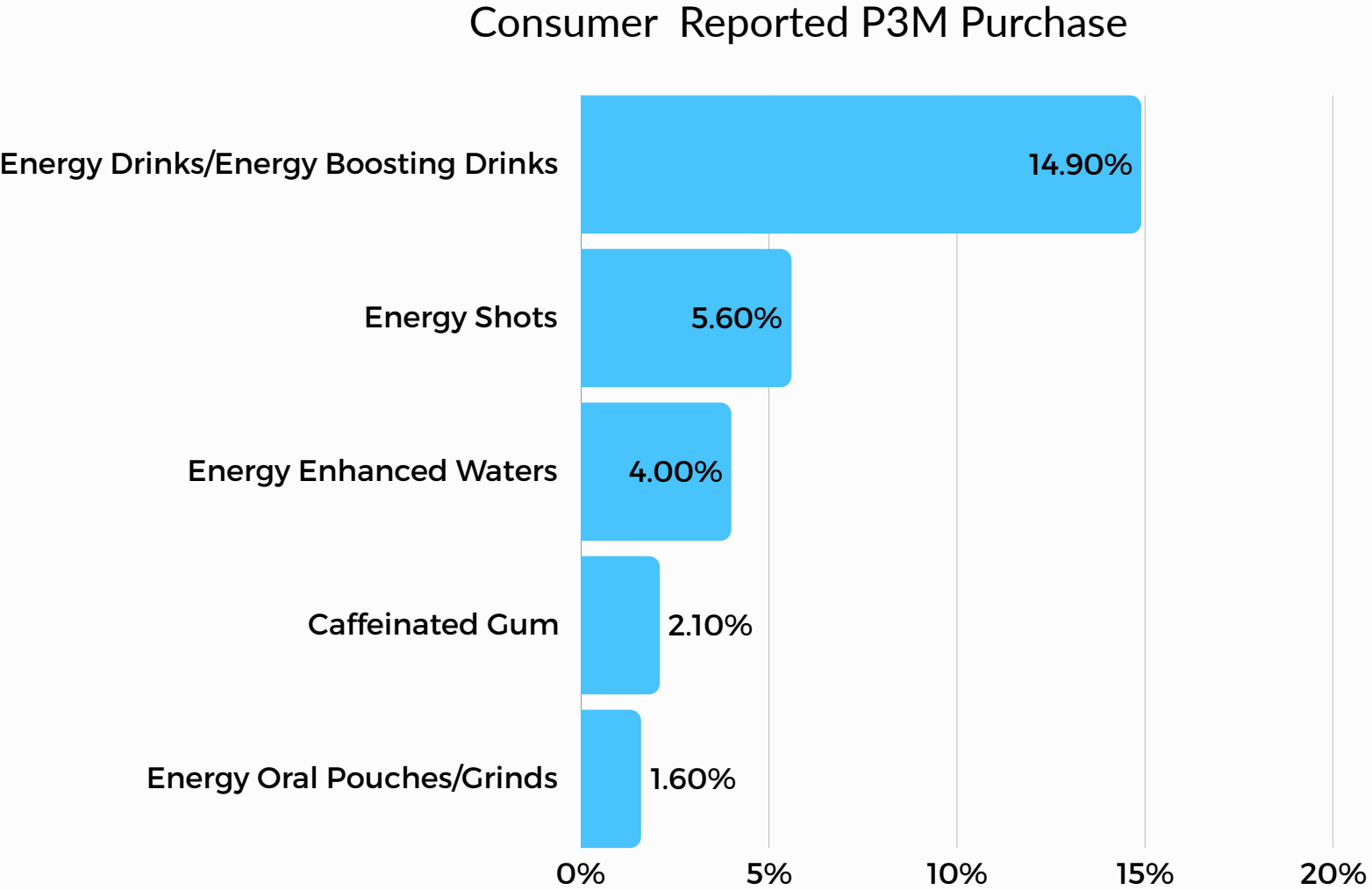
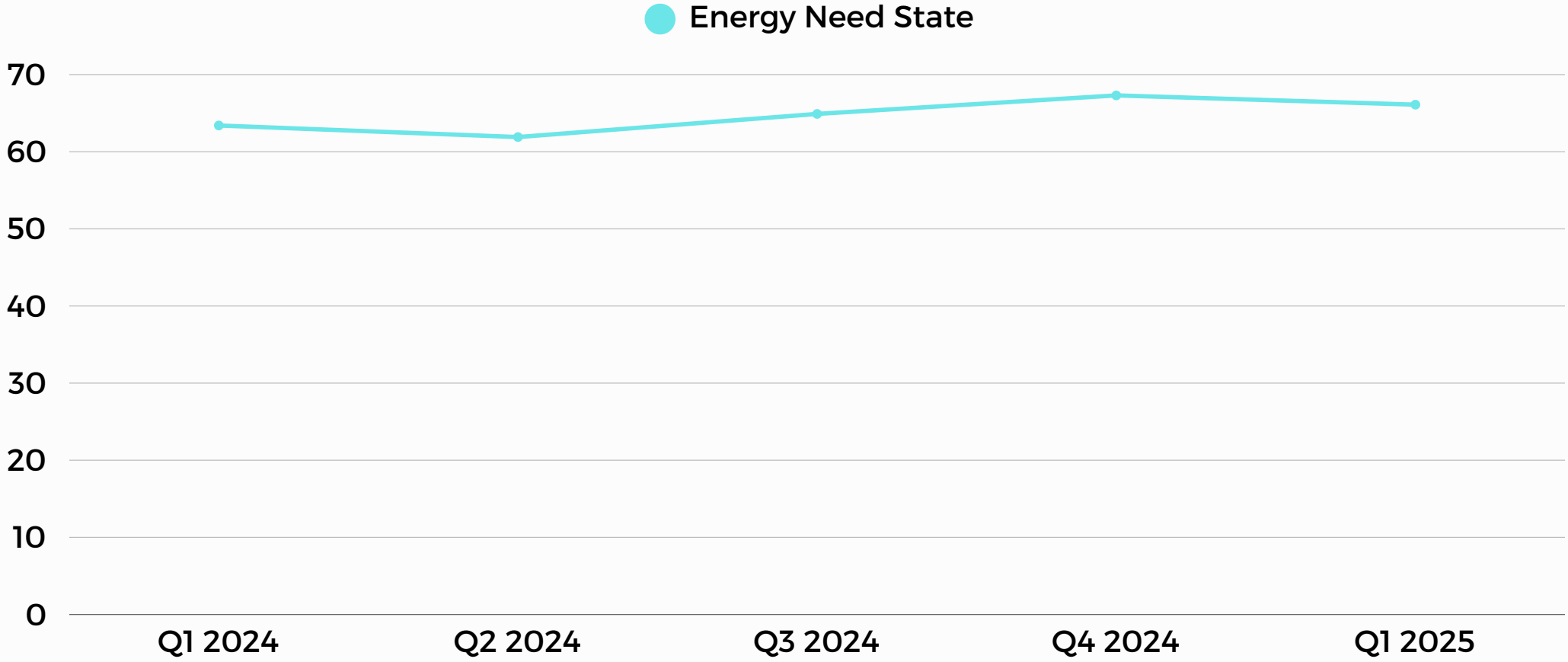
- Potentially saturated, but strong now
- Innovation Opportunities
- Future Innovation or high risk/high reward
- Proceed with Caution, or, Monitor



**CONSUMERS
WANT
CALMER
ENERGY &
FOCUS**



In Q1 2025 66% of respondents fell into the Energy Need State



- **52.2% of Americans agree they often feel tired and sluggish, up from 50.9% in Q4 2023.**
- **47.7% of Americans agree they often rely on products or supplements to give them an energy boost, up from 43.7% in Q4 2023. (Brightfield Group Q1 2025)**

Energy Re-booted: Consumers want Calmer Energy & Focus

Energy Products were everywhere at Expo, with many differentiating by “cleaner”, and “calmer” attributes. The data supports this evolution within the energy category.

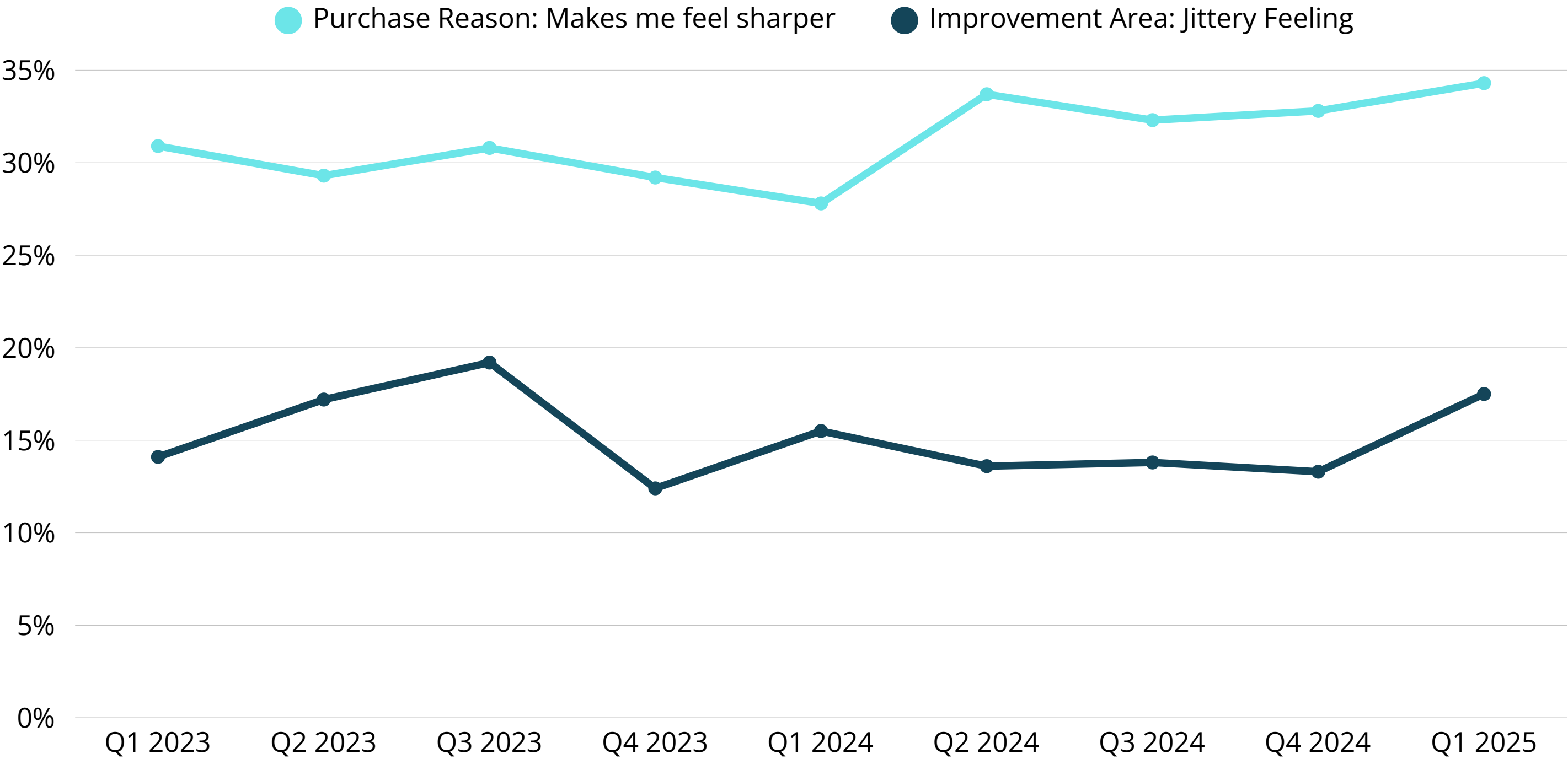
Consumers continue to rely on energy products to keep up with their busy lifestyles, but their preferences are shifting toward smarter, more health-focused options. Once dominated by high-caffeine, high-sugar formulas, the energy drink market is now seeing a rise in products made with cleaner ingredients and better-for-you (BFY) energy sources. Today’s consumers want a steady, sustained boost—without the crash or jitters often associated with traditional energy drinks. They’re also increasingly linking energy with mental clarity and focus, seeking products that help them feel sharper and more alert.





Energy Consumers increasingly look for products that help them feel sharper and less jittery

Brightfield Group asked consumers of select “energy” categories about “improvement areas and “reason for purchase”



Source: Brightfield Group; Wellness Consumer Insights; Q1 2025

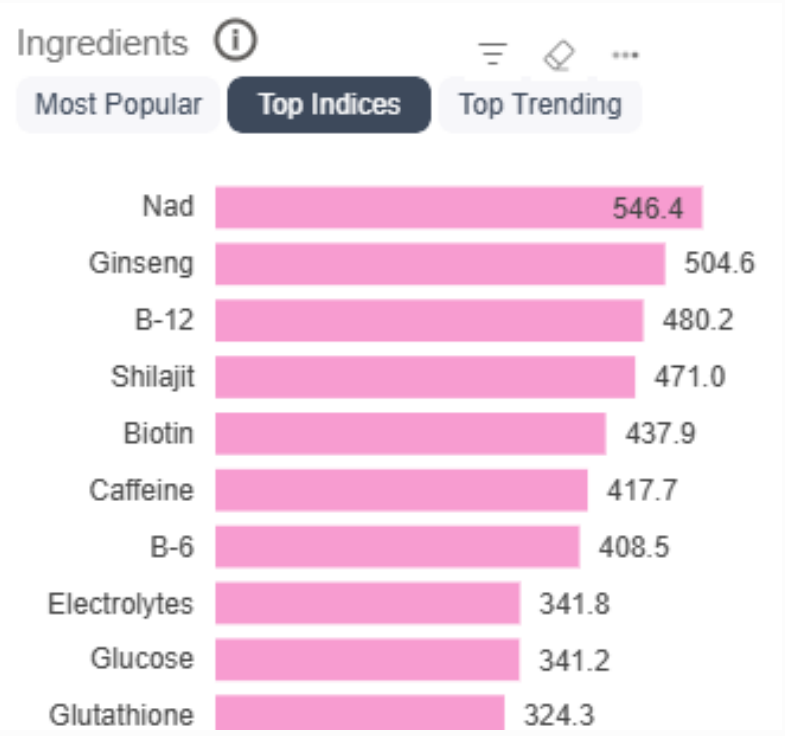
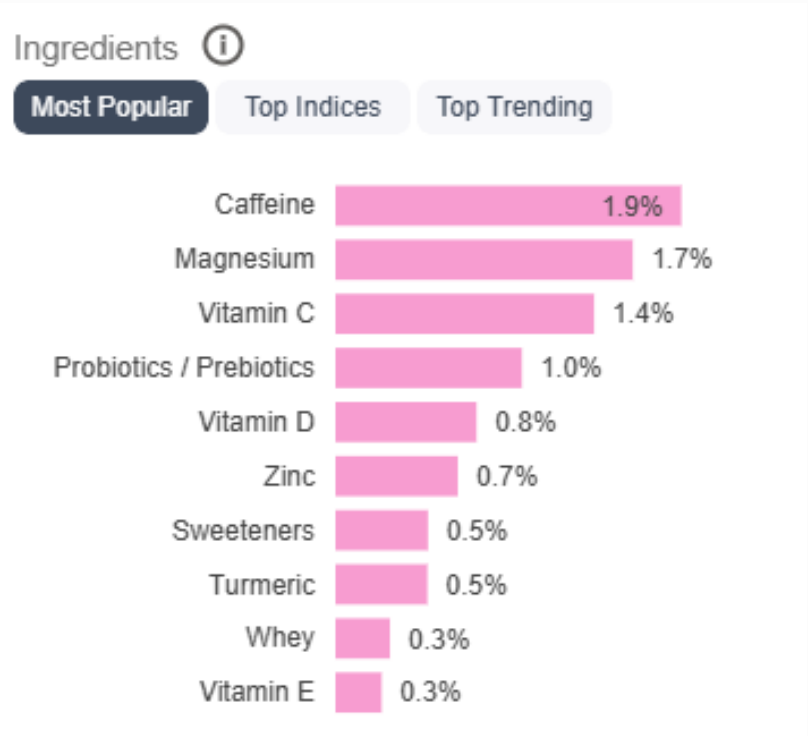
Posts about Energy are ticking up on social media, with new ingredients popping up that move beyond caffeine.

Social Discussions: Growth of Posts about Energy



Source: Brightfield Group Wellness Social Listening

“Energy” Ingredients that are established “Energy” Ingredients to Watch





WOMEN'S HEALTH

Products for Women’s Health were on display at Expo: Need ranged from Perimenopause support, PMS symptom relief, hormone balancing, and libido boosting



Hormone Health & PMS



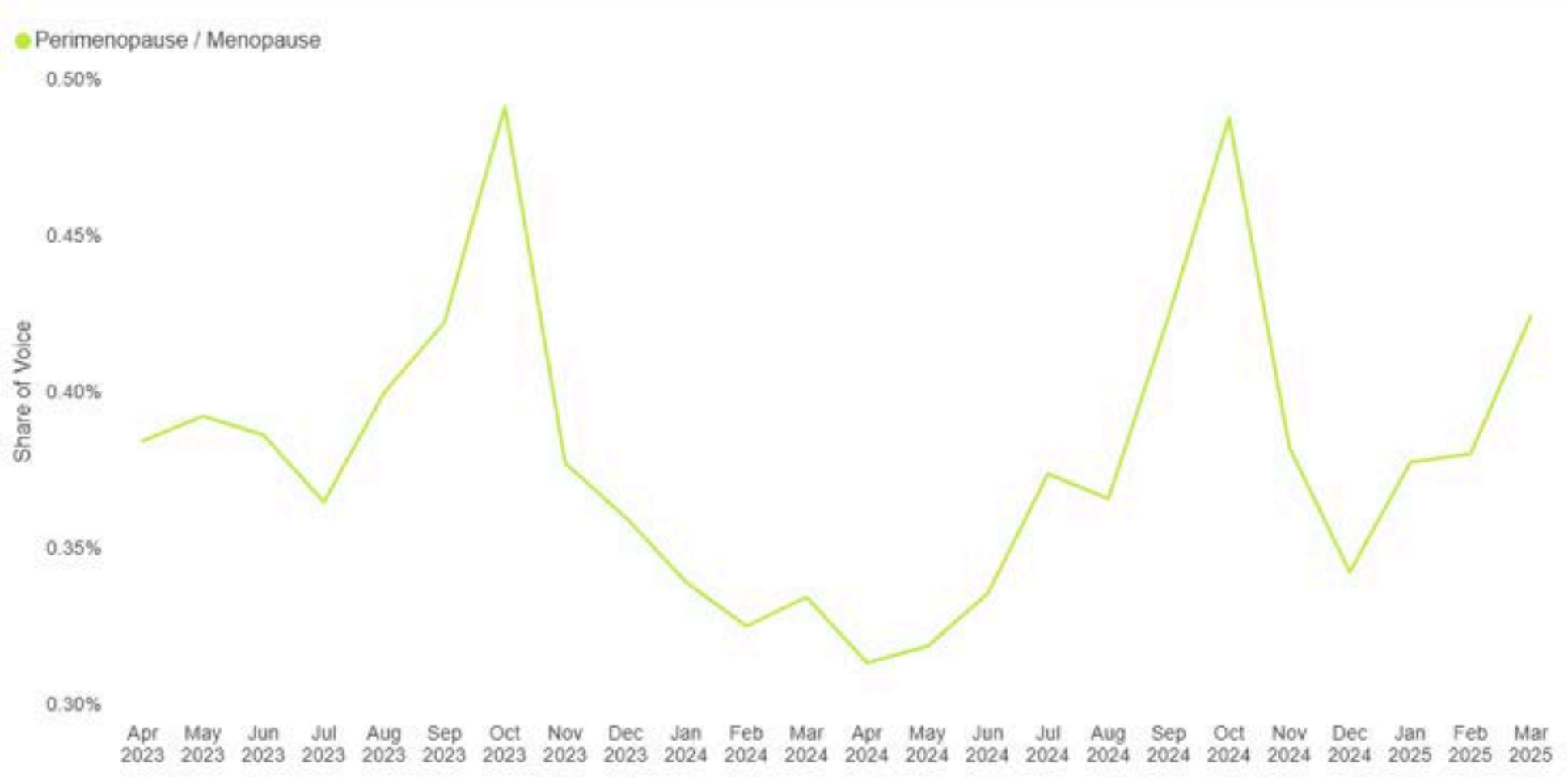
Perimenopause Support



All Stages



Libido Boosting



In social conversations about “Conditions”, women’s health conditions like Endometriosis, PMS and Perimenopause all showed growth over the past year.

At 5% Share of Voice (SOV), Perimenopause is on par with mentions of Obesity.

Condition	Share of Voice	Actual Growth	Growth Rate	Sentiment Score
Endometriosis	0.76%	0.47%	72.90%	75.05
PMS	2.60%	0.82%	37.47%	82.79
Perimenopause / Menopause	5.03%	0.93%	20.43%	87.37
PCOS	2.31%	-0.26%	-10.40%	79.57

Source: Brightfield Group; Wellness Social Listening & Quarterly Survey; March 2025

Download the Q4 2024 Wellness Webinar report for more in-depth insights about perimenopause!

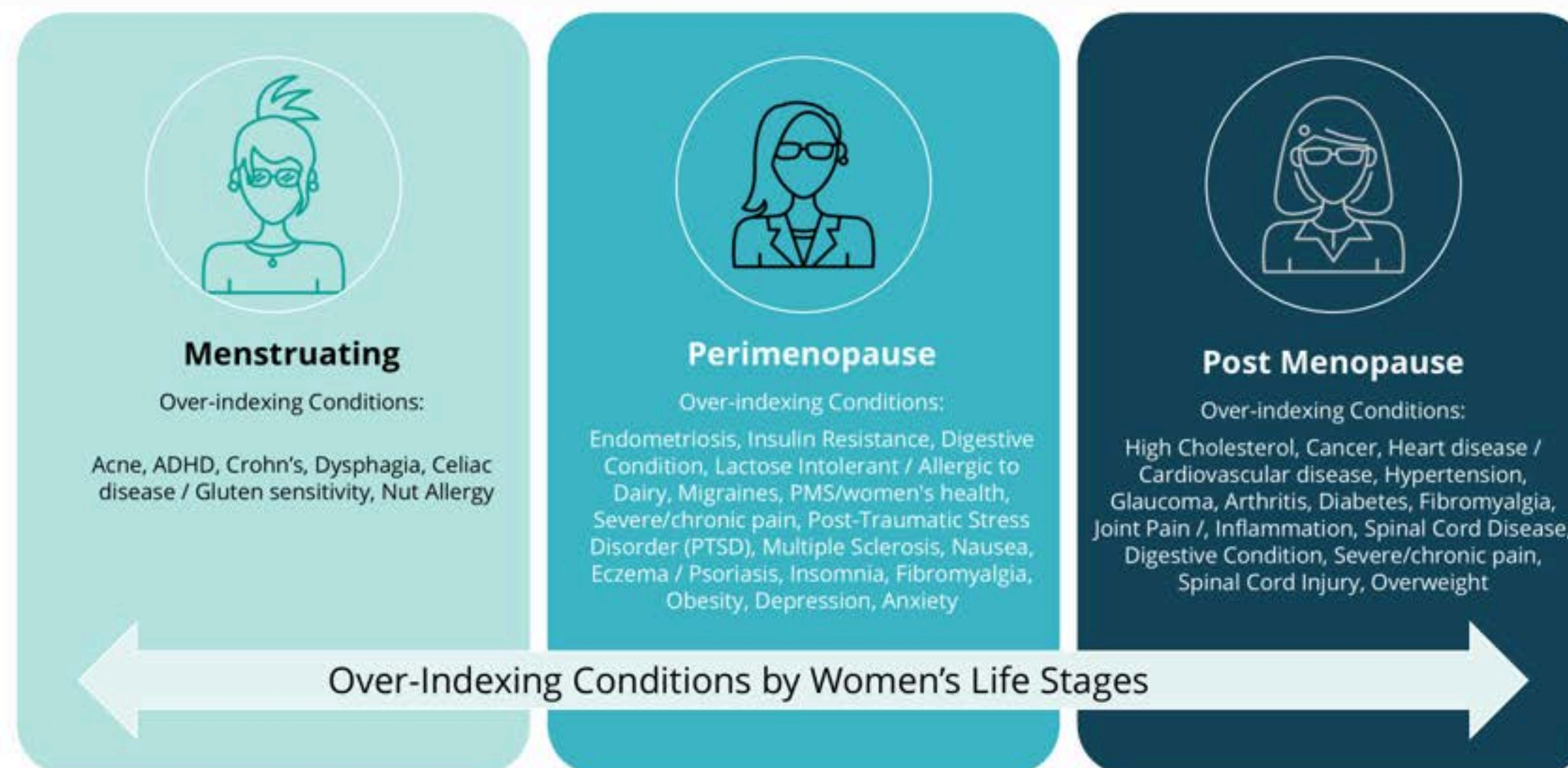


Survey Respondents: Women in Perimenopause face a larger variety of conditions than other women



The topic of perimenopause is expected to continue gaining traction for several reasons:

- Increased awareness and discussions around the topic
- Millennials and Gen X'ers aging into perimenopause
- Increased awareness of under-represented symptoms contributing to more women being aware that they may be experiencing perimenopause earlier
- Increased medical attention (although still limited)

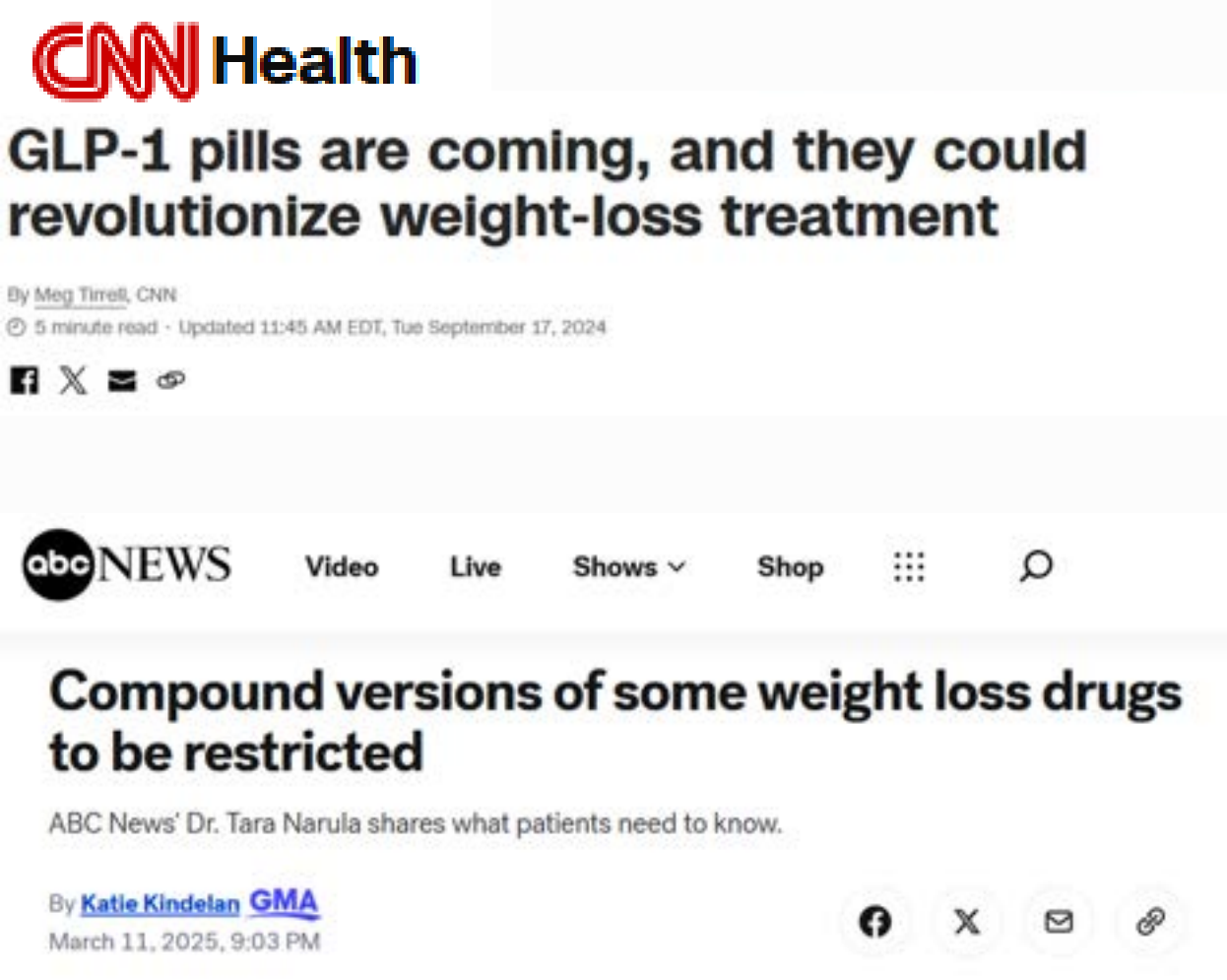
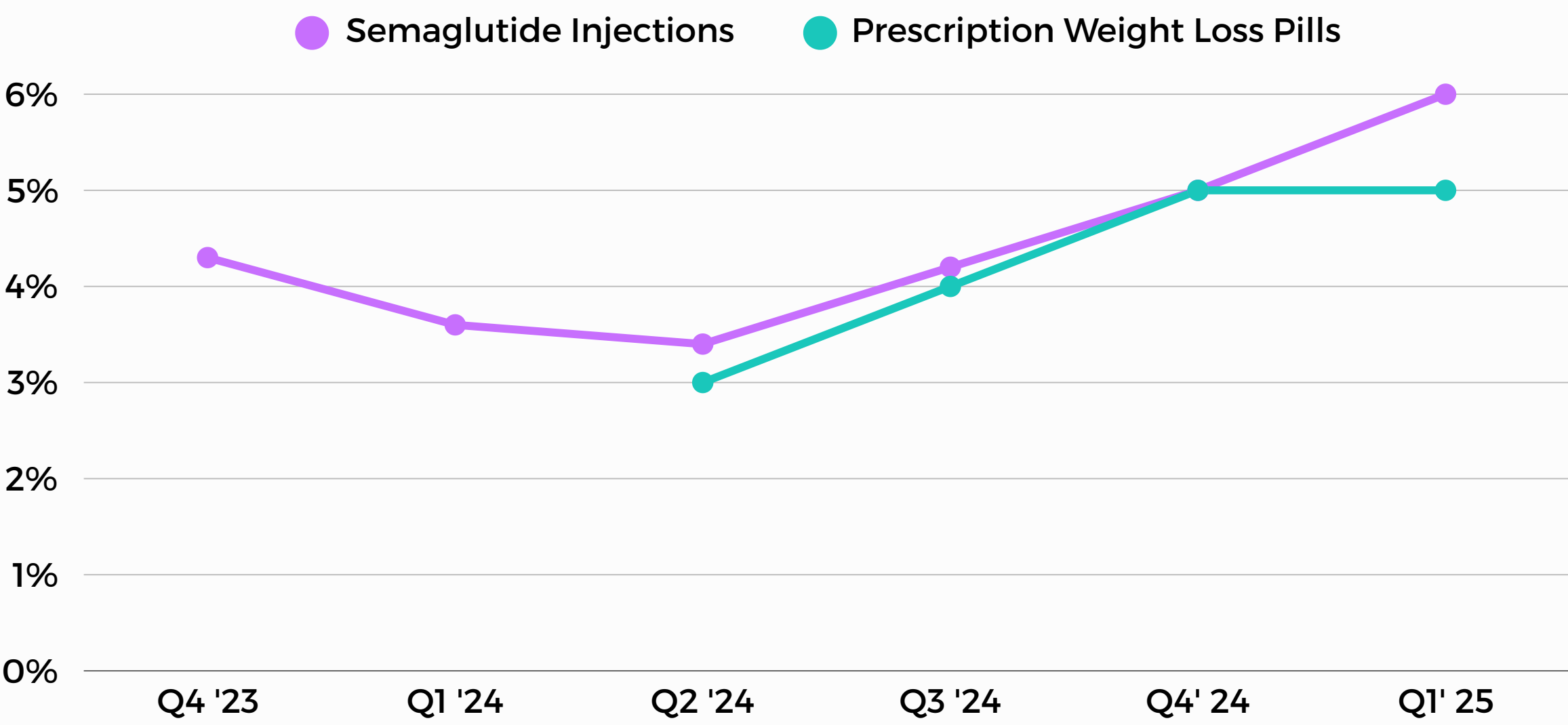


Source: Brightfield Group; Wellness Social Listening & Quarterly Survey; March 2025 and Google Trends



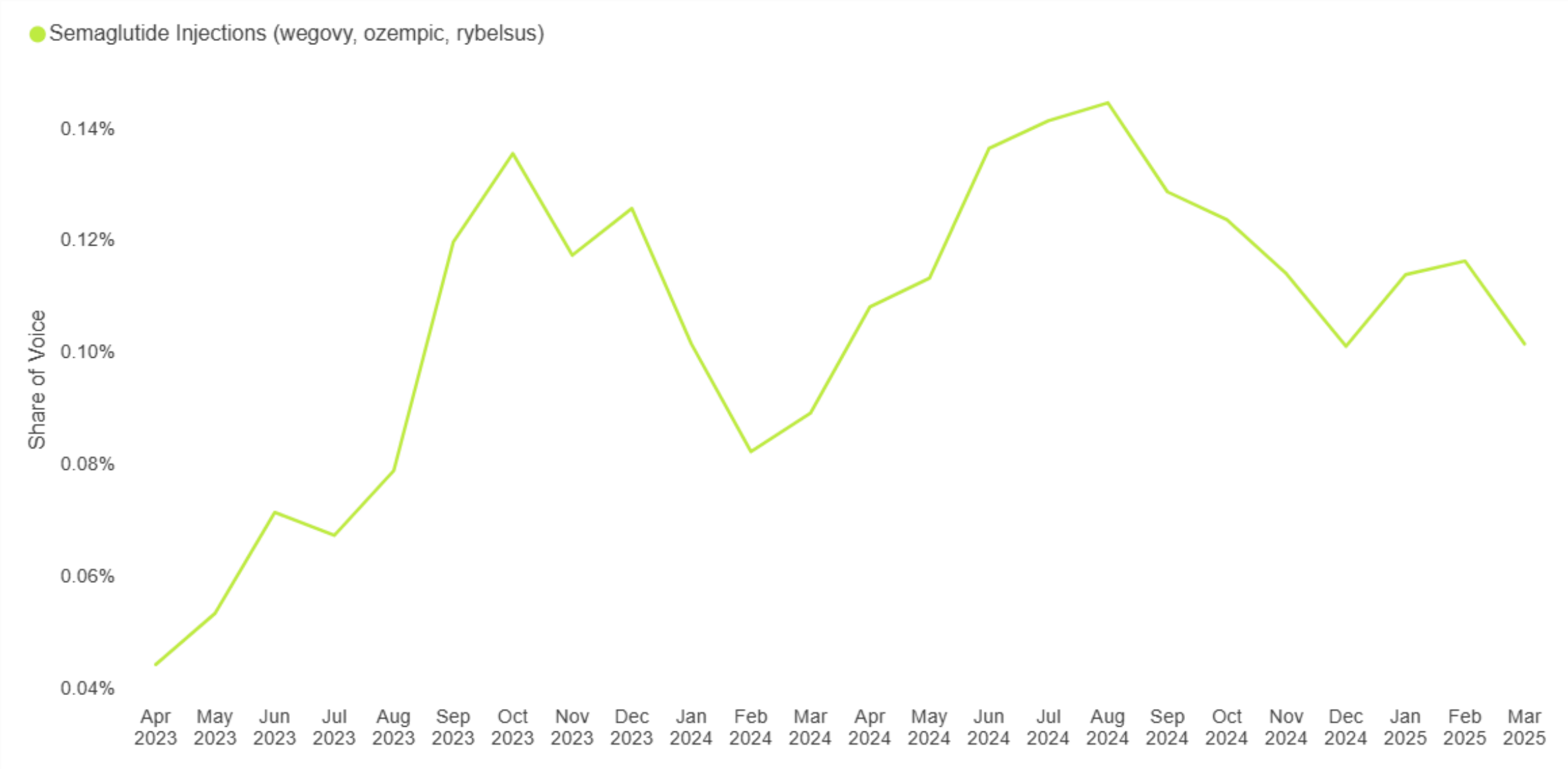
GLP-1 AT EXPO: SUPPORTING THE JOURNEY WITH SNACKING, SUPPLEMENTS

16 million people reported using semaglutide in the P6M



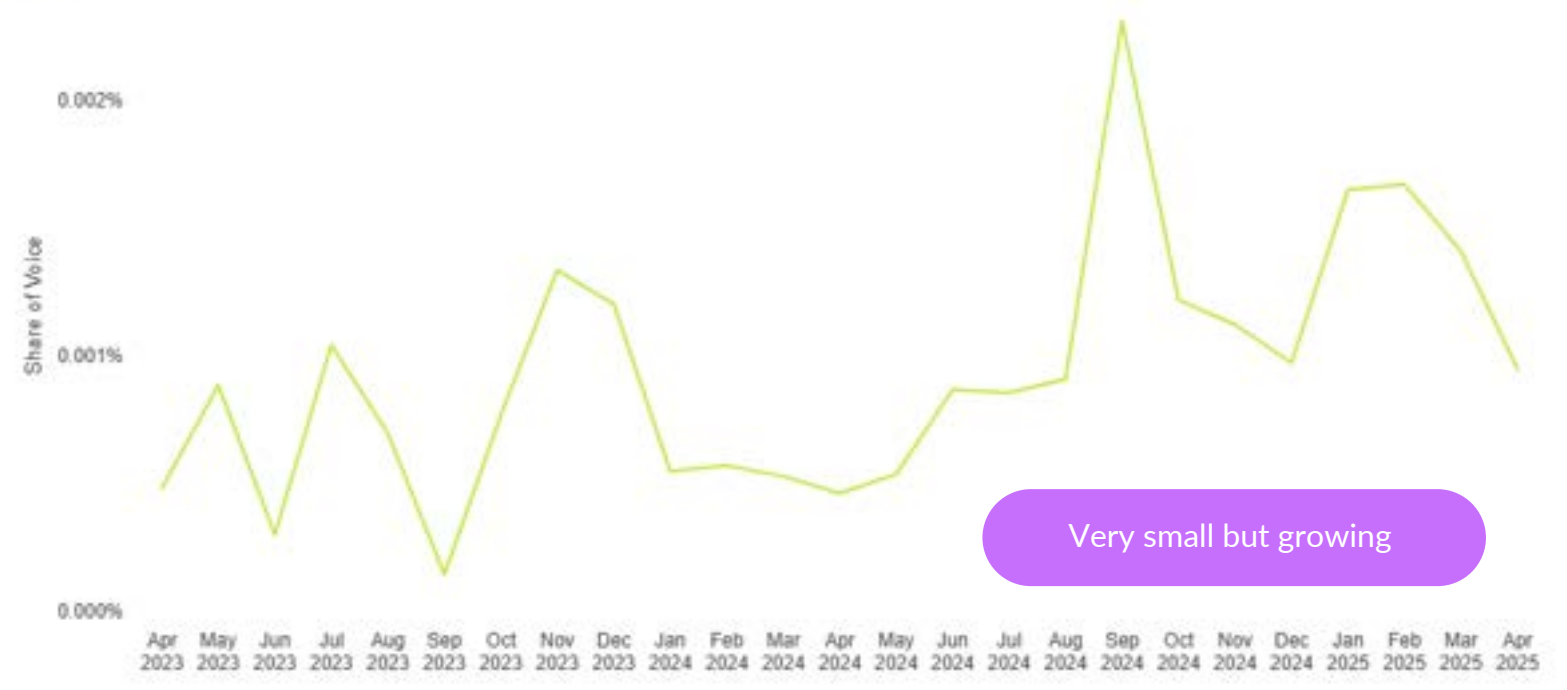
Beyond the Fad: Semaglutide Injections continue to hold steady with steady growth in social conversations

Conversations about Semaglutide Overtime on Social Media



Expo West: Products positioned for mimicking the GLP-1 effect

Akkermansia



Products that were positioned as providing a similar effect as GLP-1 medications were also present at the Expo. These products typically contain some variety of ingredients such as Akkermansia, Berberine or Prebiotics. These ingredients also show increased activity on social listening.

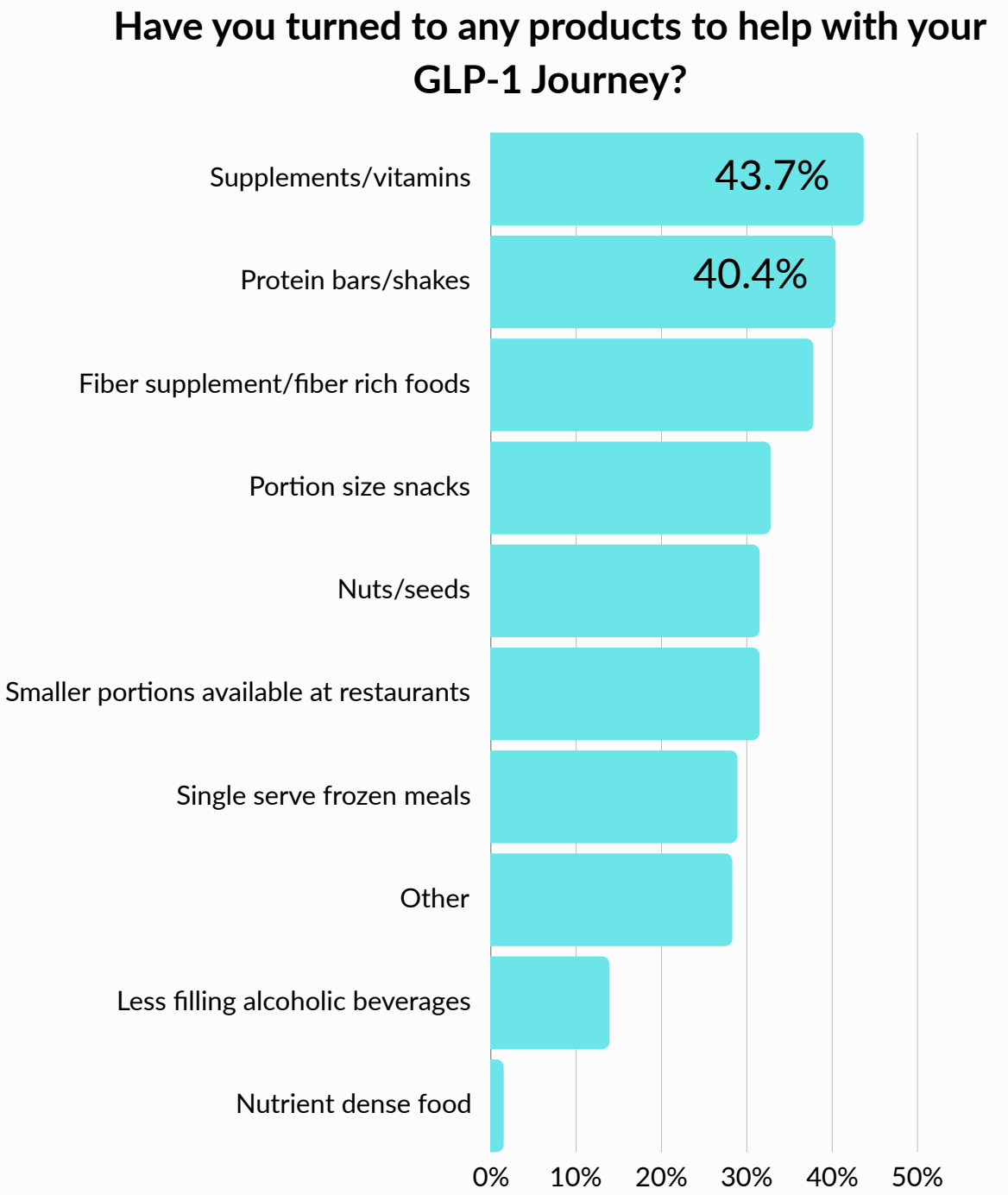
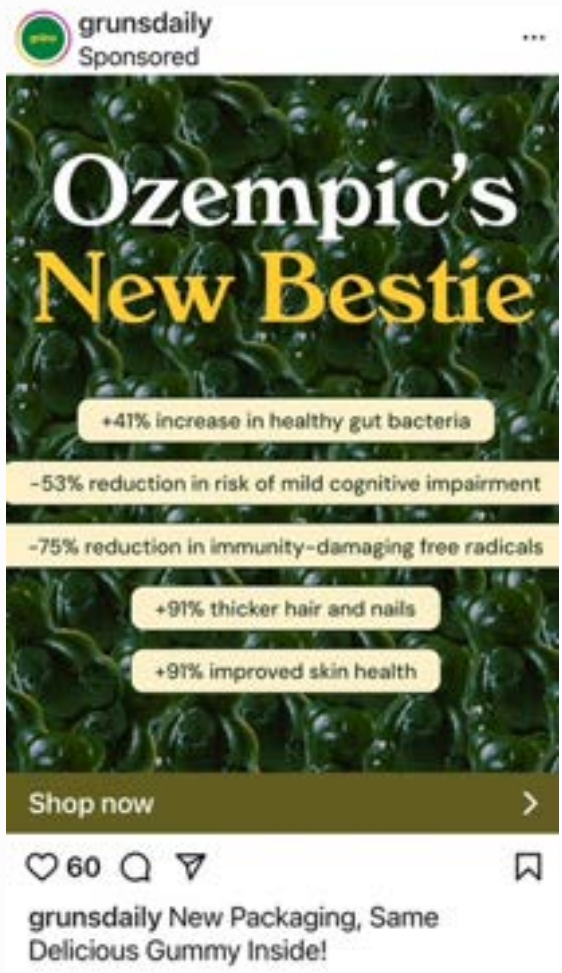
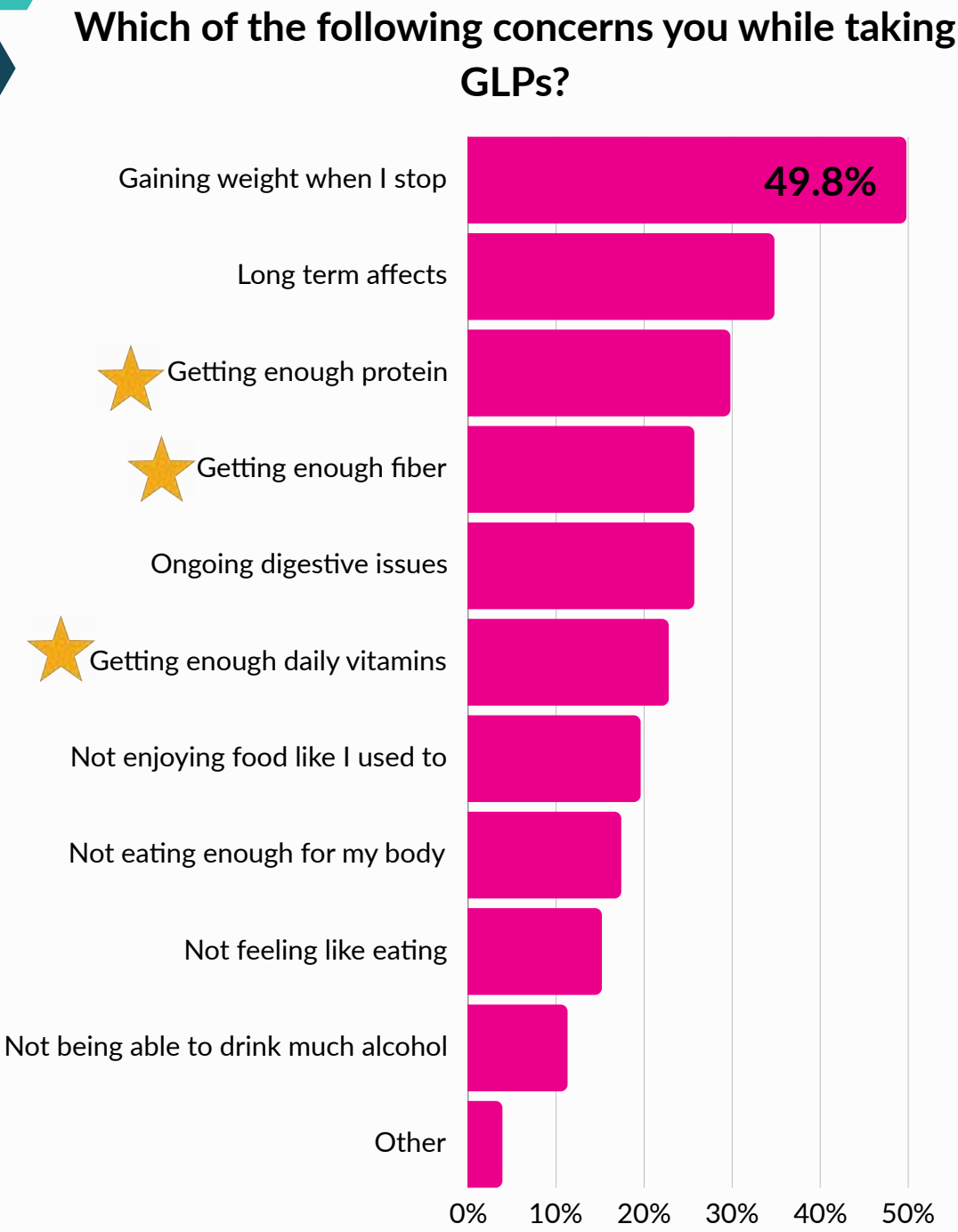


Berberine





Expo West: Products positioned for support to the GLP-1 users' journey - validated by consumers' concerns and experiences



Who are the GLP-1 Users?



54% are Female
up from 52% in Q4



Increase in X and Z,
and decrease in
Millennials



Becoming more
middle income but
still high income
dominant



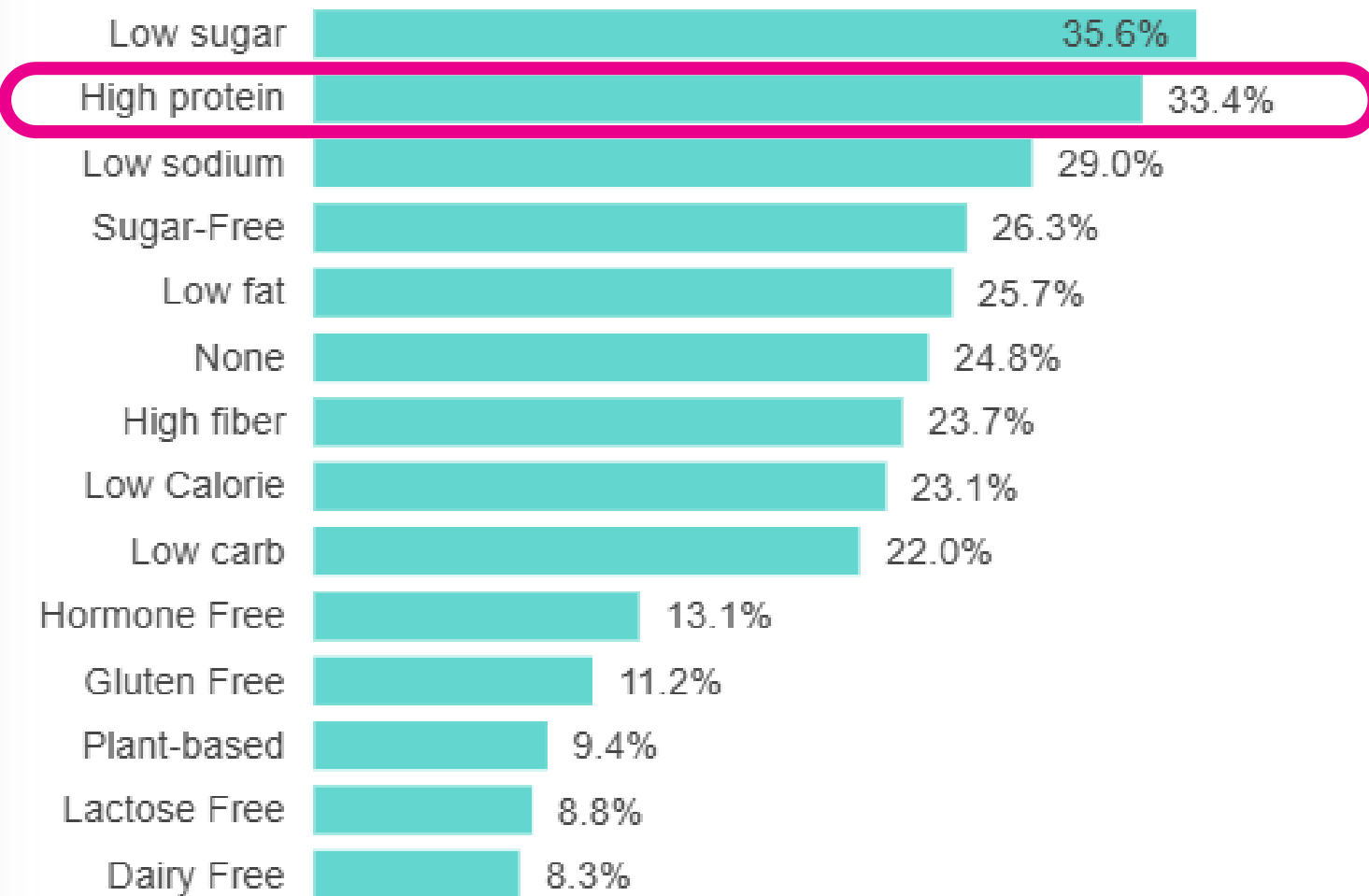


**PROTEIN, EVER
HEARD OF IT?**

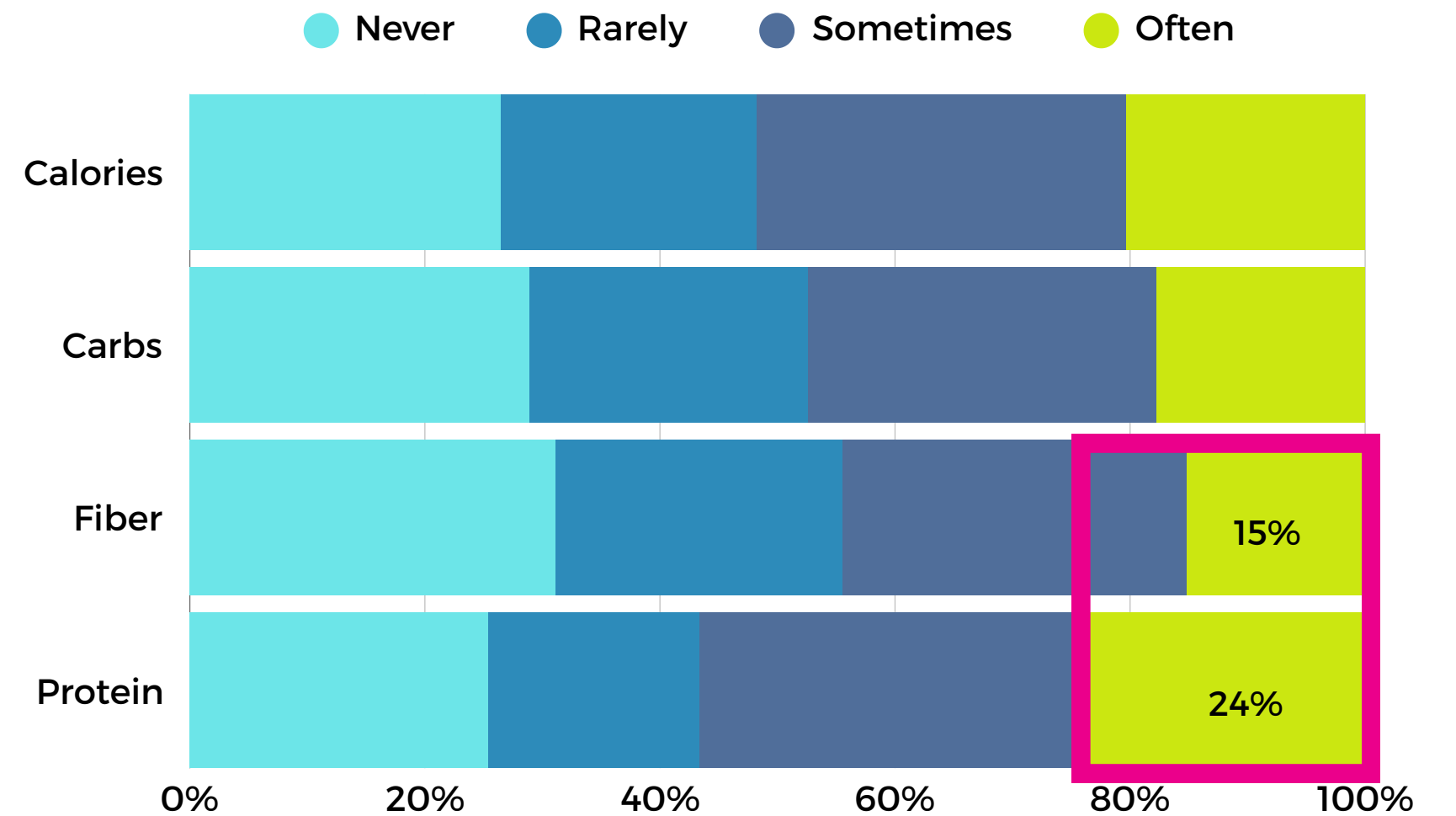


Q1 2025 - About one third of consumers are focused on Protein, and one fifth of consumers are focused on high fiber

Important Label Claims ⓘ



Track Daily Consumption



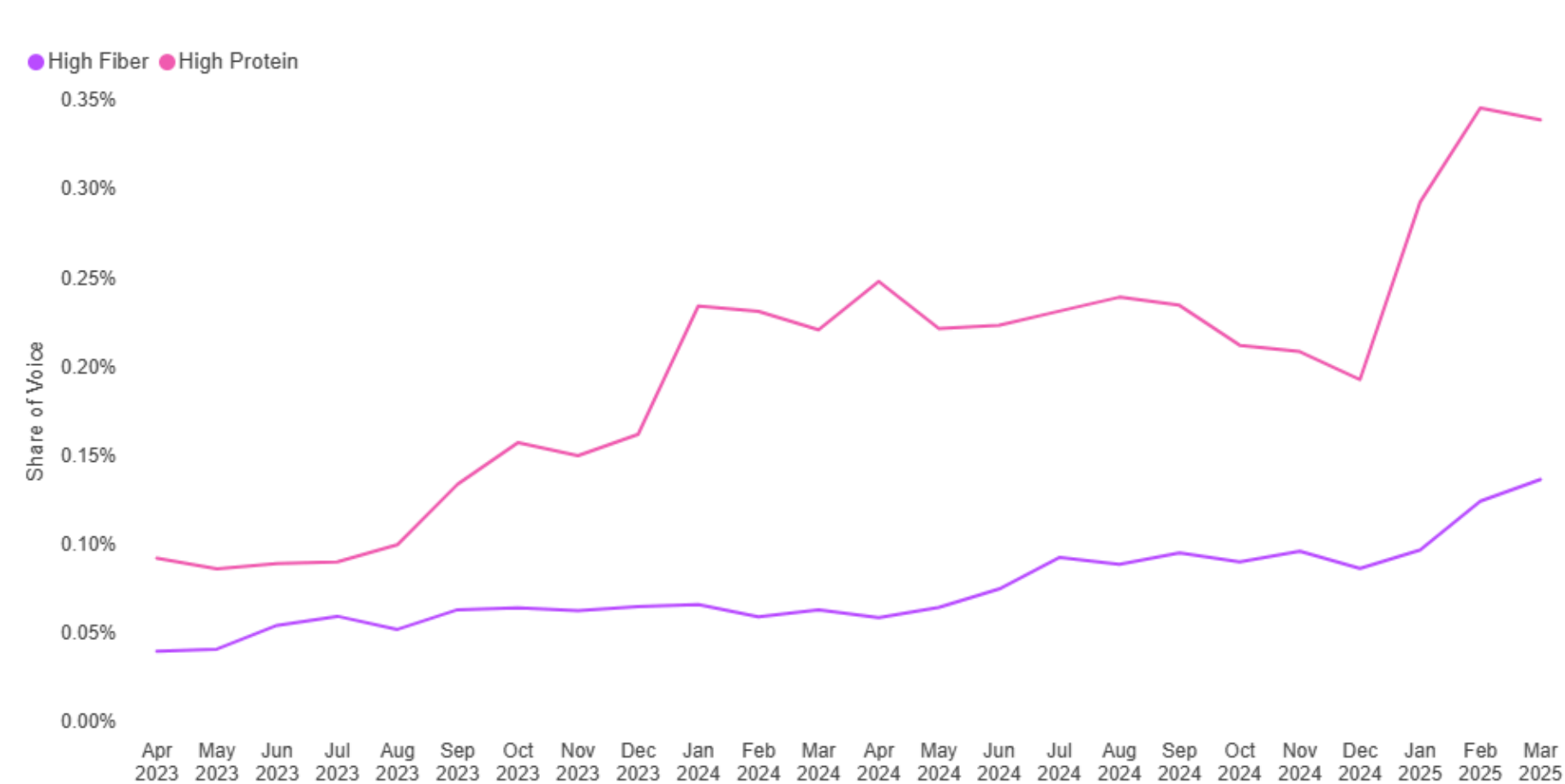
Source: Brightfield Group; Wellness Social Listening & Quarterly Survey; March 2025



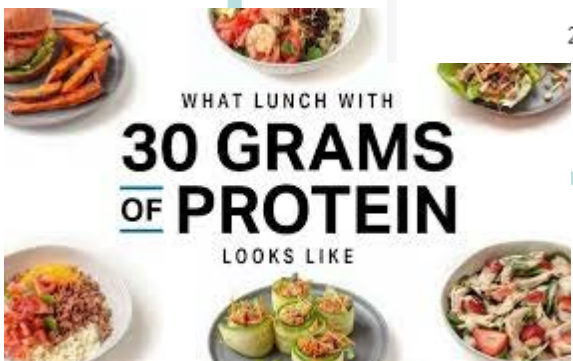
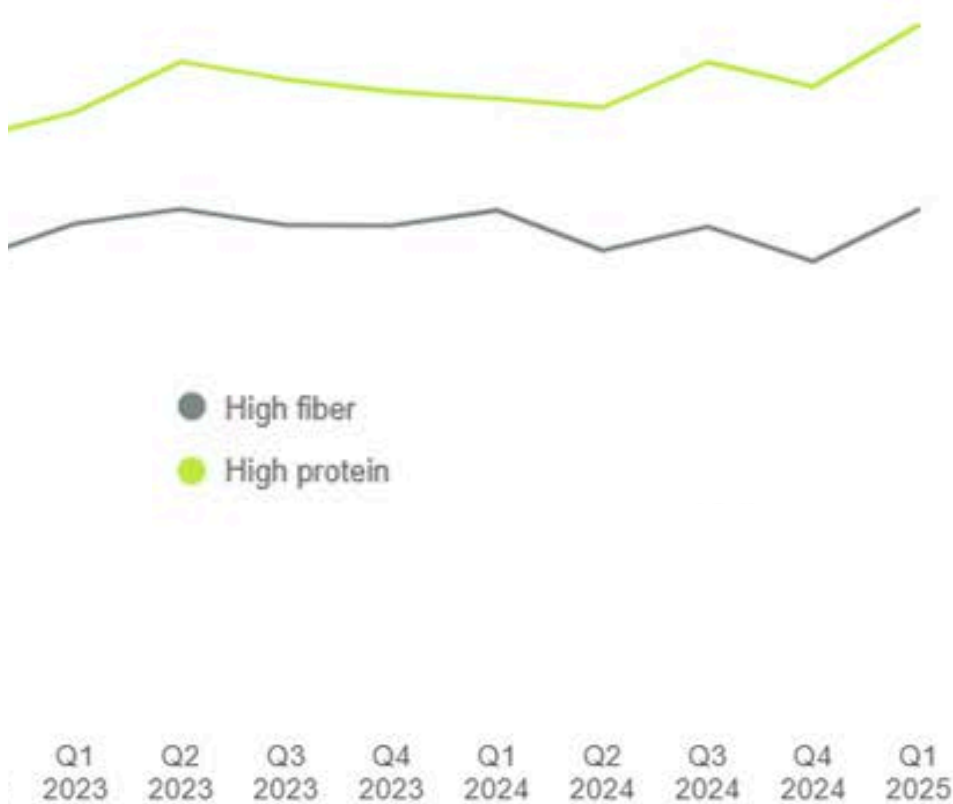
Protein continues to grow. Fiber starting to uptick

2 percentage point increase in consumers saying they are looking for products that say high in fiber

High Fiber and High Protein Conversations Over Time



Label Claims





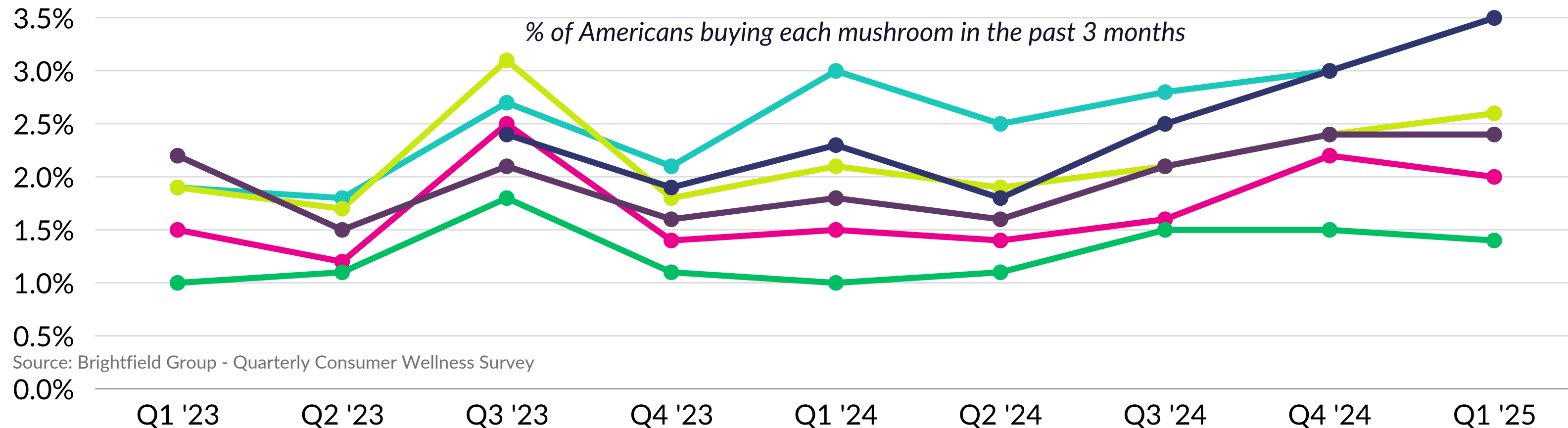
FUN FUNGI

The Shroom Boom at Expo continues to bring mushrooms mainstream



Functional Mushrooms Starting to Mainstream

Purchasing Mushrooms as an Ingredient, as a Supplement or Mushroom Coffee

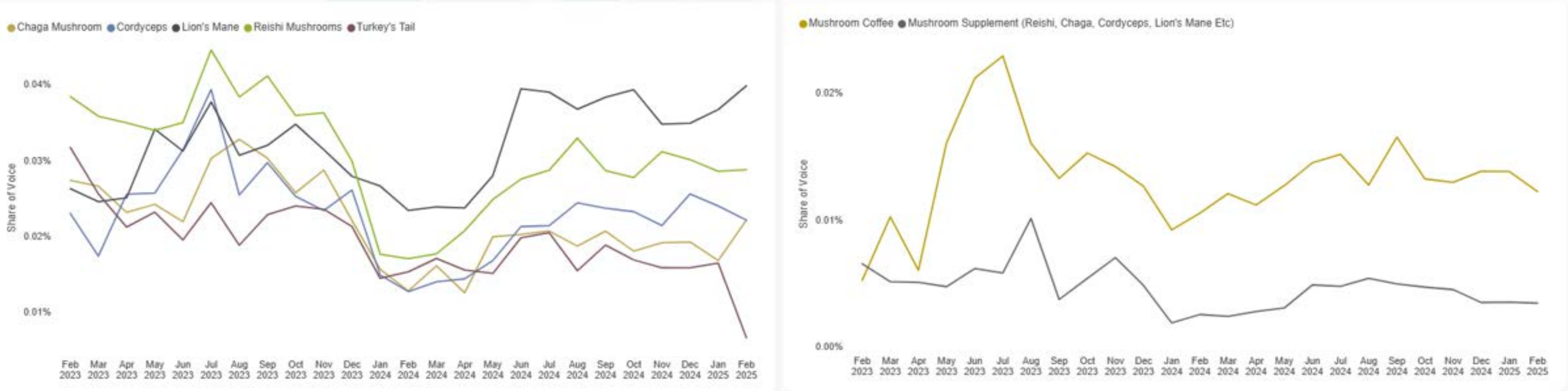


In early 2023, Majority segment (41%) were Wellness Seekers

In 2024, largest segment became Better Way Believers, signaling mushrooms are becoming more "mainstream"

Tracking the Shroom Boom in Social Media the last two years

Conversations about Functional Mushrooms skyrocketed in 2023 and have started to pick up again toward the end of 2024 into 2025.



Top Need States: Established Trends

Need State	Share of Voice
Holistic Wellness	43.39%
Brain/Mental Health	26.73%
Immunity	25.48%
Energy	22.18%
Functional Health	18.19%

Analyzing Conversations about Functional Mushrooms + Need States

Established Trends show how Functional Mushrooms are already being discussed with Holistic Wellness, Brain/Mental Health and Immunity topping the conversations. Growing Need States shed light on where Brands may want to innovate or position moving forward. Areas like Relaxation, Energy, Focus and Women's Health may help functional mushrooms brands stay relevant and meet consumers' unmet needs.

Growing Need States: Innovation Opportunities to Watch

Need State	Actual Growth	Growth Rate
Relaxation	6.53%	88.57%
Energy	12.99%	69.64%
Focus	2.42%	55.57%
Women's Health	1.01%	53.37%
Digestive Health	4.39%	47.36%



SEA PRODUCTS

Late 2024, we thought there might be something bubbling up with sea products wehn we went to BevNet Live

Sustainably harvested
Deep Ocean Minerals



Ocean's secret stash of plant-based nutrients, with our exclusive Sea-biotics

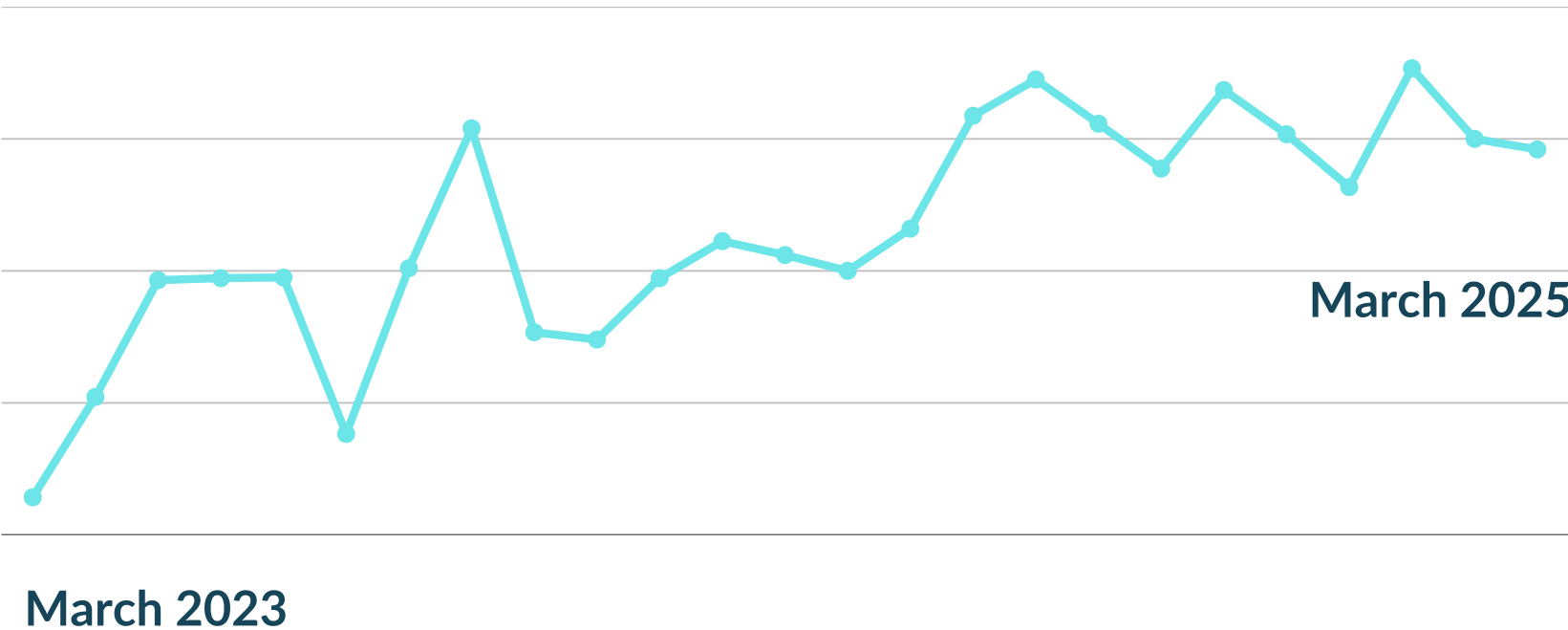


Fast Forward to ExpoWest: Sea-Based Products spanned supplements to snacks



Spirulina - Heats up in 2024

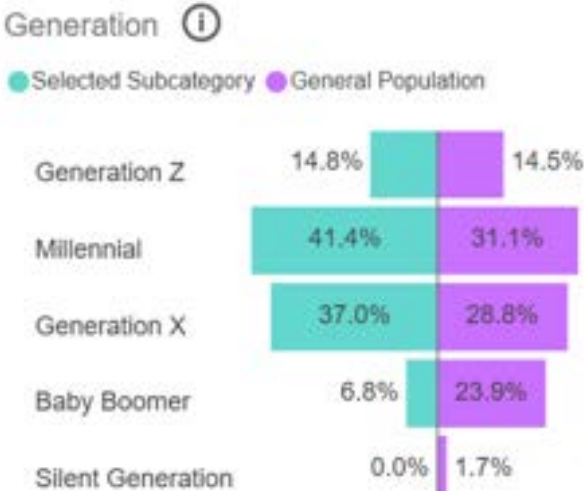
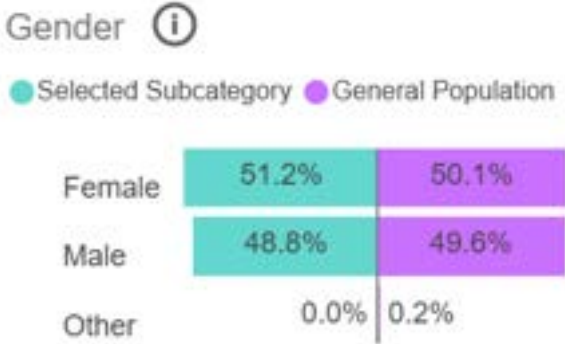
Social Conversation Over Time



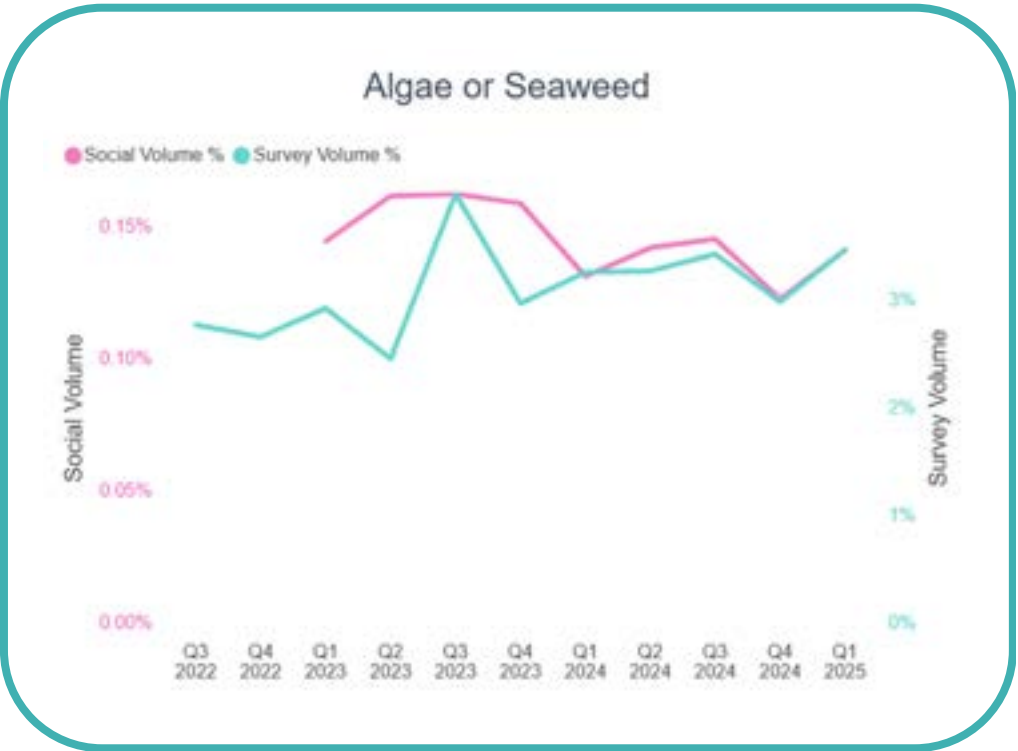
Spirulina is surging in functional drinks—powering detox shots, smoothies, and plant-based blends. Packed with natural energy, antioxidants, and immune support, it’s often mixed with ginger, turmeric, moringa, and coconut water for a health + flavor boost. A go-to in green smoothies and cold-pressed juices targeting weight loss and inflammation. Big with health-conscious, clean-label seekers—especially Millennials (41.4%) and Gen X (37.0%). Gender split is even; Gen Z and Boomers trail behind.



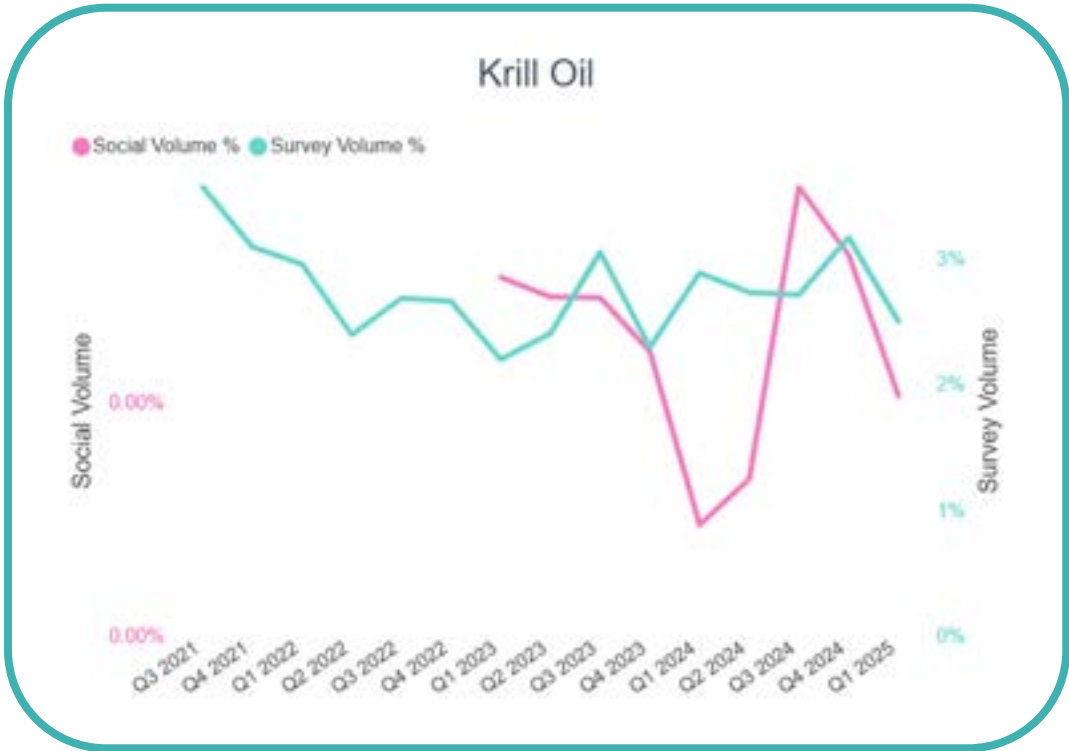
Spirulina Purchasers



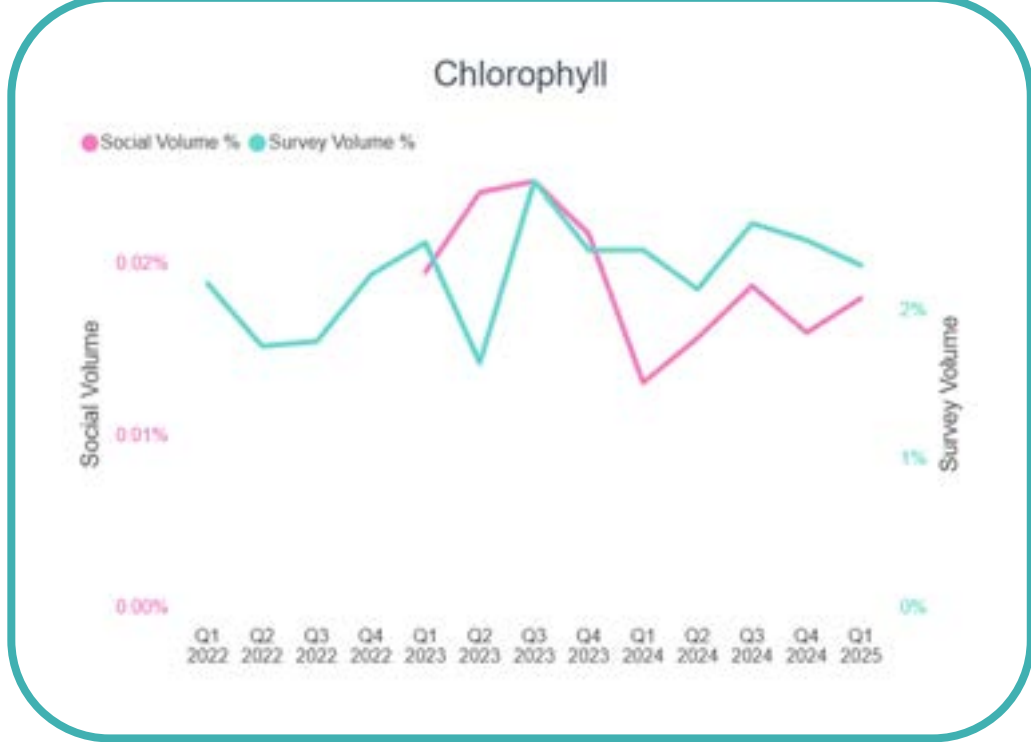
Other Sea Adjacent Ingredients Trying to Find their Place



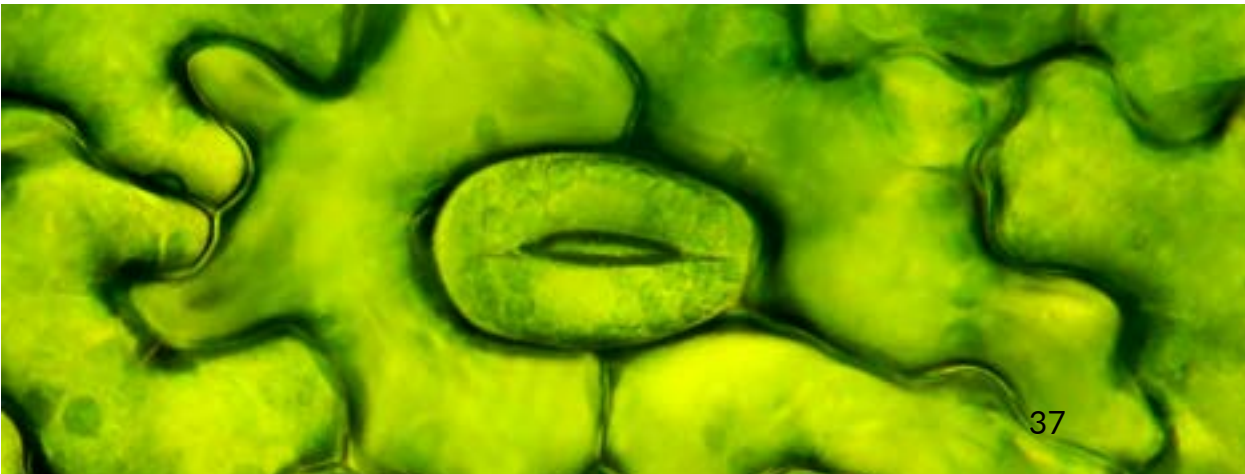
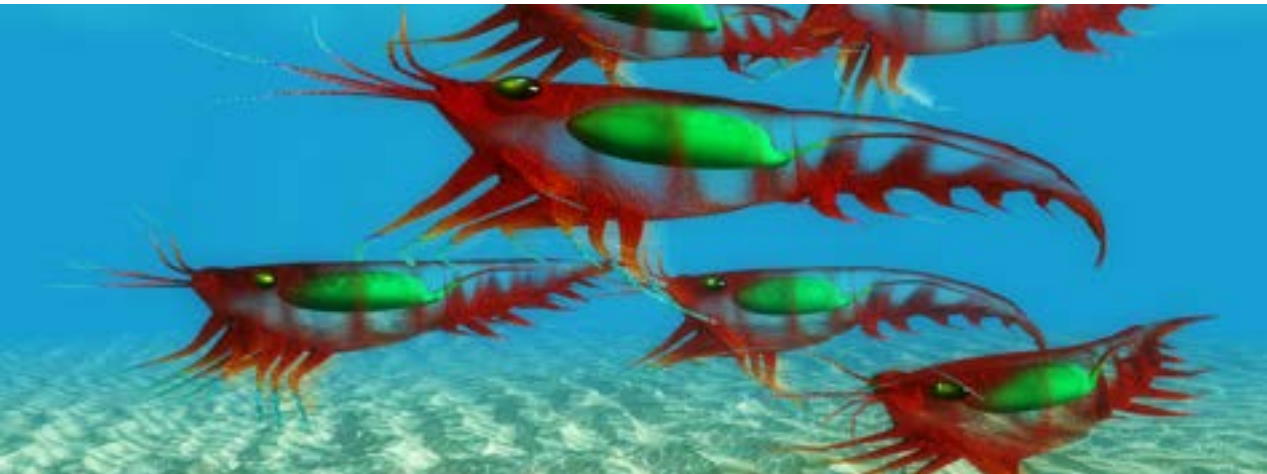
Algae and seaweed purchasing has remained steady throughout 2024, while social conversations have remained somewhat flat.



Krill Oil conversations remain small and have been volatile but there was high growth in 2024. Q1 2025 is showing declines, while purchase incidence has remained more steady



Chlorophyll conversations dropped in 2024 while purchasing increased going into 2024 and has remained steady



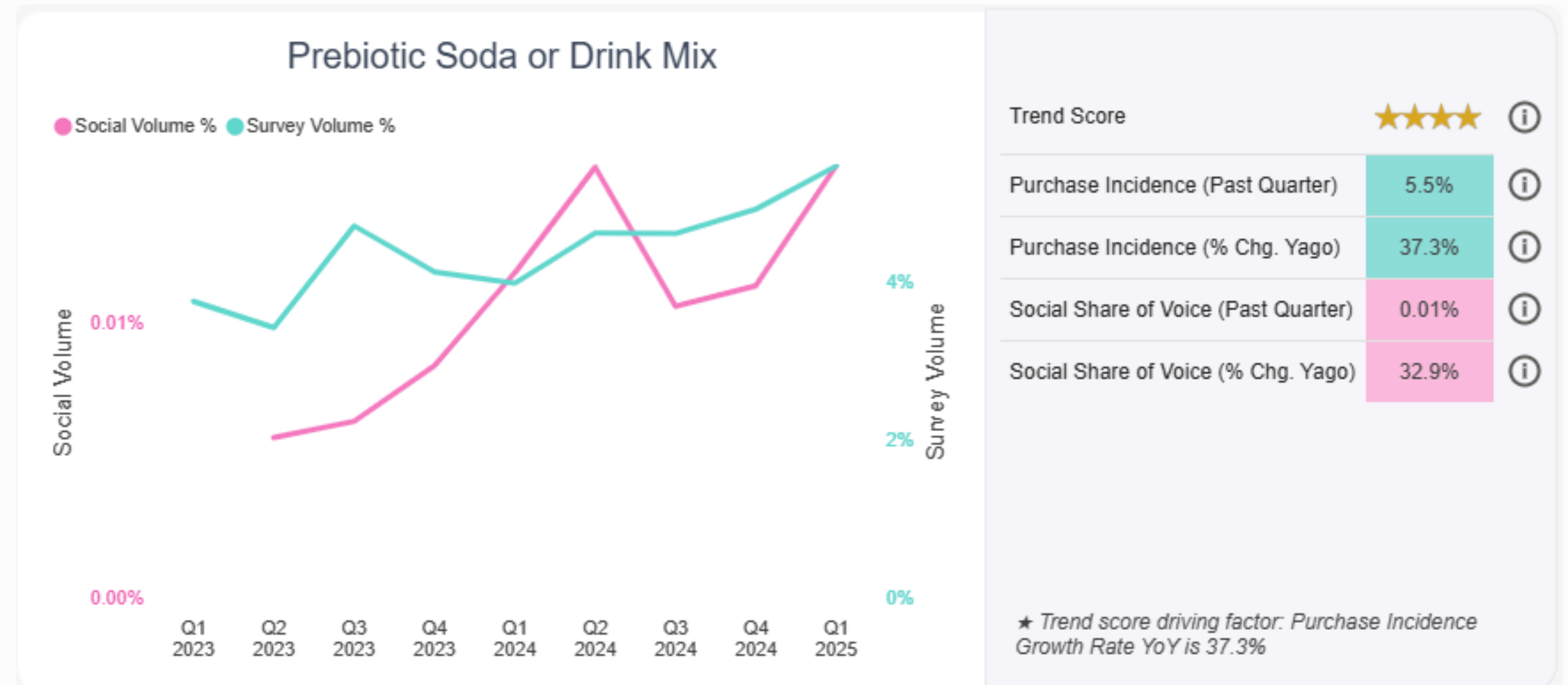
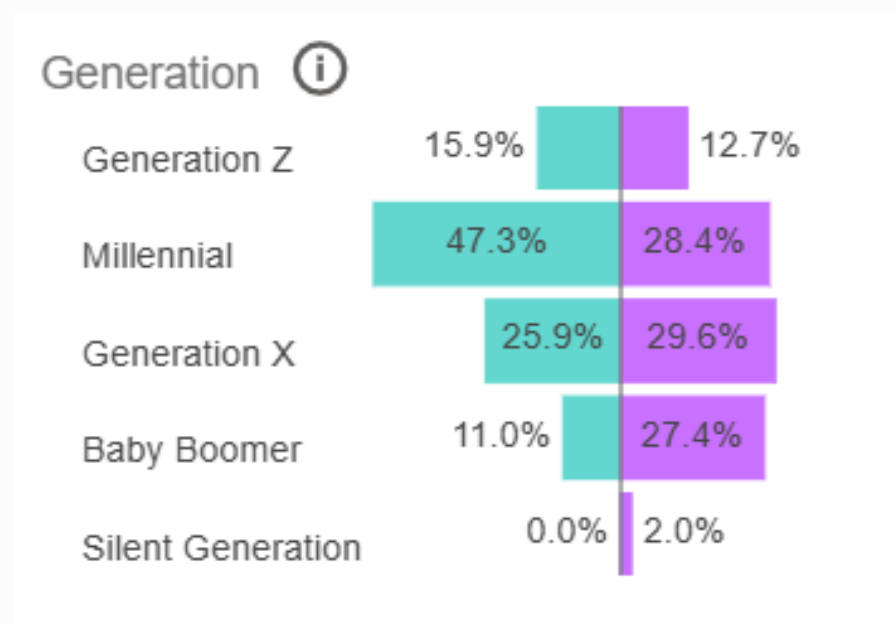


BFY SODA

No big surprise... BFY Soda Brands “popping” at Expo!



Prebiotic Soda grew 37.3% in purchase incidence YoY





OTHER THINGS WE SPOTTED

Cognitive Health



Products positioned for brain health featured a variety of ingredients such as lion's mane, DHA, and Omegas. While still niche, 13% of consumers fell into the cognitive health need state in Q1 2025, and 73% of respondents agreeing with the statement “I am currently focused on sharpening my mind and avoiding mental decline”.

New Plant-Based Sources for Snacks



Expo products featured new varieties for plant-based snacks, often pulling inspiration from exotic fruits and other cultures e.g. jackfruit, breadfruit, and waterlily seeds.

Longevity



Products positioned for longevity typically fell into the supplements area with Urolithin and NAD featured as a key ingredient. In the survey, 24% of respondents said that “living a long time” was an important aspect of what they considered “healthy aging”.

Any Questions?



New! Wellness CPG Monthly Subscription

The Wellness CPG Platform includes consumer insights sourced from syndicated consumer surveys and social listening to help brands:

- **Expand Consumer Reach:** Understand your customers and what they want out of their products
- **Unlock Sales Opportunities:** Tie your target consumer segment in with your retail and channel strategy
- **Secure a Competitive Edge:** Leverage a unique blend of social listening and consumer survey data to outperform the market.

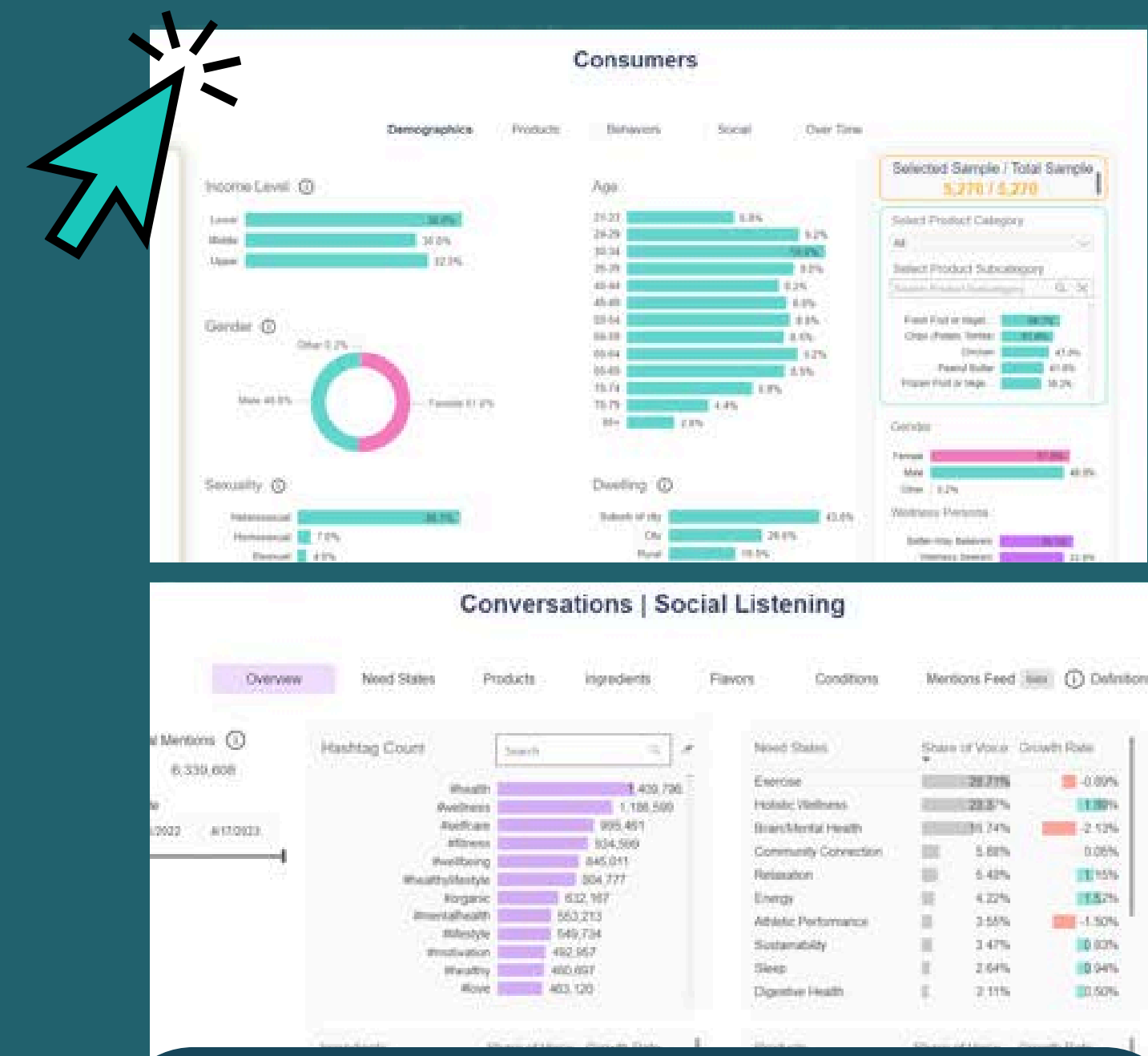
Subscribe for monthly access and receive:

- Onboarding with Account Manager + Weekly Office Hours to help guide you
- Licenses for up to 5 team members
- Flexible dashboard views to zero in on your category and consumer segments

Price: \$2k/month (50% off when you sign up in April!)

Schedule a Demo

Click to see a demo video of the platform!





[Click here to see our past trend reports!](#)

