



2025

THE GROWING APPEAL OF FUNCTIONAL MUSHROOMS

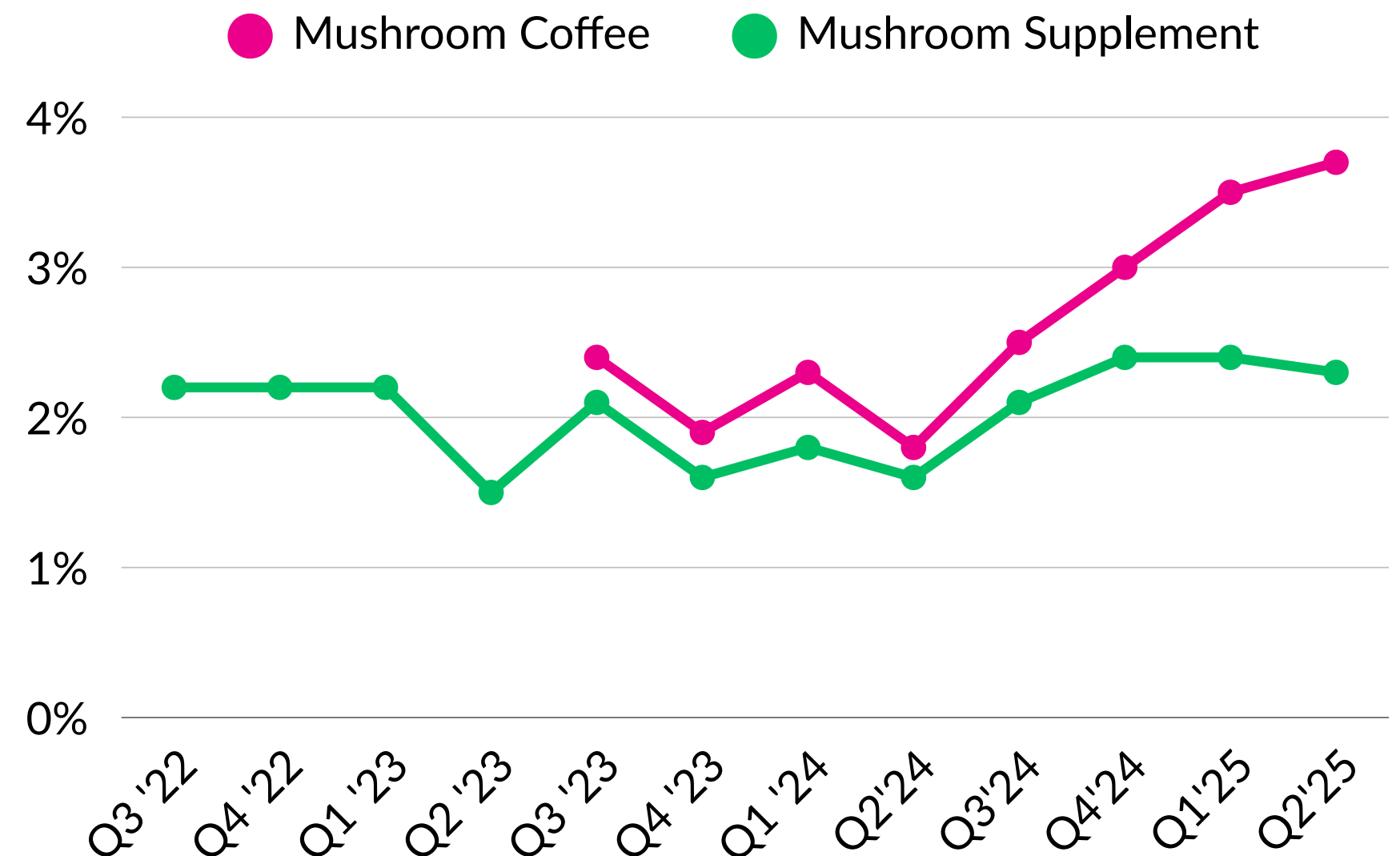
**CONSUMER & SOCIAL
LISTENING REPORT**

Functional Mushroom Product Usage on the Rise

Functional mushrooms are moving beyond niche wellness circles and becoming a regular part of consumer health routines. This surge is closely tied to the evolving preferences of health-conscious consumers, who are increasingly seeking natural solutions for daily energy, focus, and immunity support - benefits purportedly offered by an array of adaptogenic mushroom varieties.

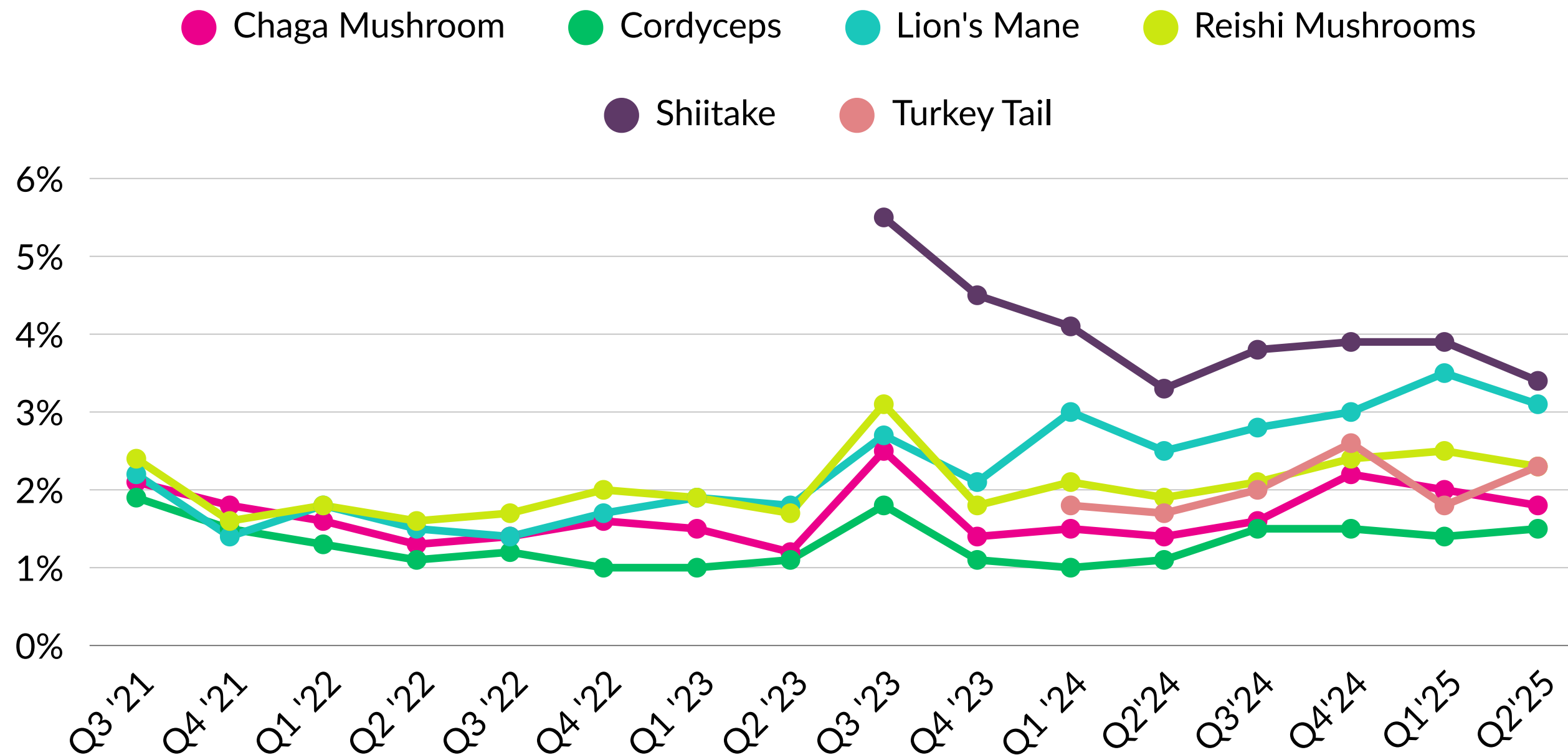
In Brightfield Group's general population consumer survey, mushroom coffee has nearly doubled in purchase over the last year, reaching a past 3-month incidence of 3.7% in Q2 2025. Mushroom supplements have seen more steady growth but incidence is nonetheless up by over 50% compared to Q2 2024.

Mushroom Supplement/Coffee P3M Purchasing



In the general population consumer data, Shiitake mushrooms are the most popular functional ingredients, but Cordyceps have been growing more rapidly

Functional Mushroom Ingredient P3M Purchasing by Variety



Q2 2025 Incidence:

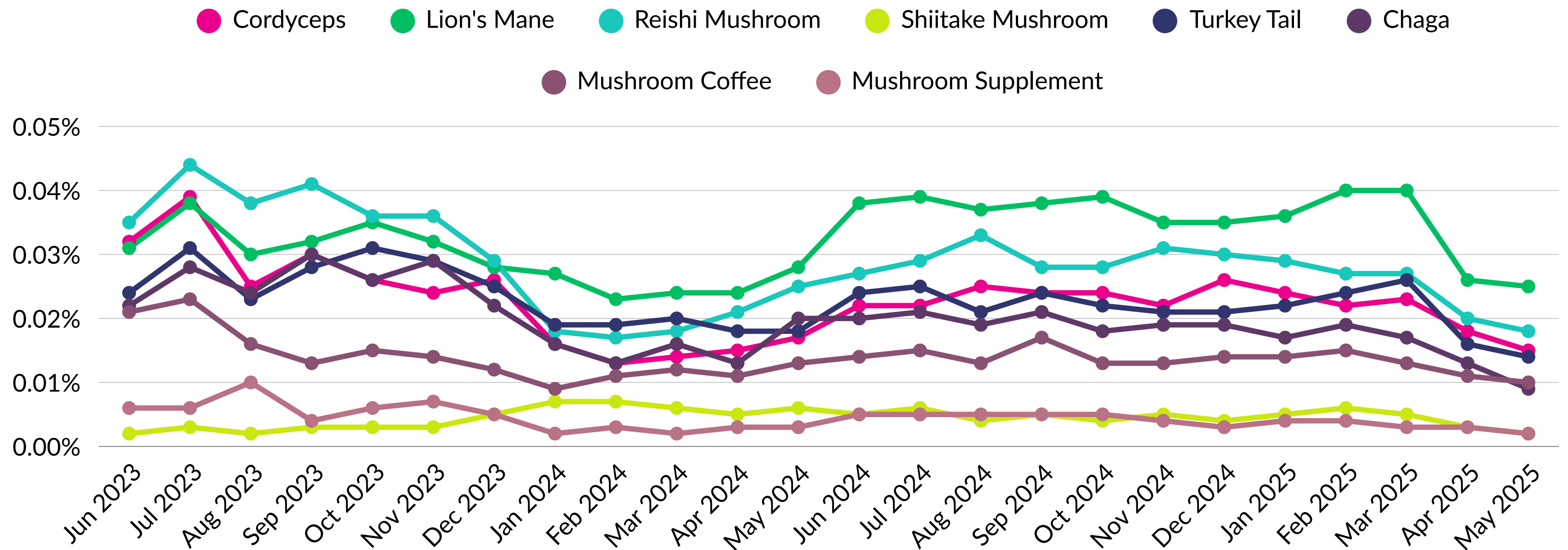
Shiitake: 3.4%
 Lion's Mane: 3.1%
 Reishi: 2.3%
 Turkey's Tail: 2.2%
 Chaga: 1.8%
 Cordyceps: 1.5%

Year-Over-Year Growth:

Cordyceps: 28.9%
 Turkey's Tail: 28.5%
 Chaga: 27.9%
 Lion's Mane: 24.6%
 Reishi: 21.8%
 Shiitake: 2.7%

On social listening, discussion of specific mushroom varieties/products slowed slightly in early 2025, with Lion's Mane holds the most share of voice

Functional Mushroom Social Volume





Social Listening: Mushroom Product Conversations

Through the Wellness CPG Social Listening tracker, Brightfield Group analyzes how functional ingredients and wellness products are discussed across digital platforms—by consumers, brands, and influencers alike.

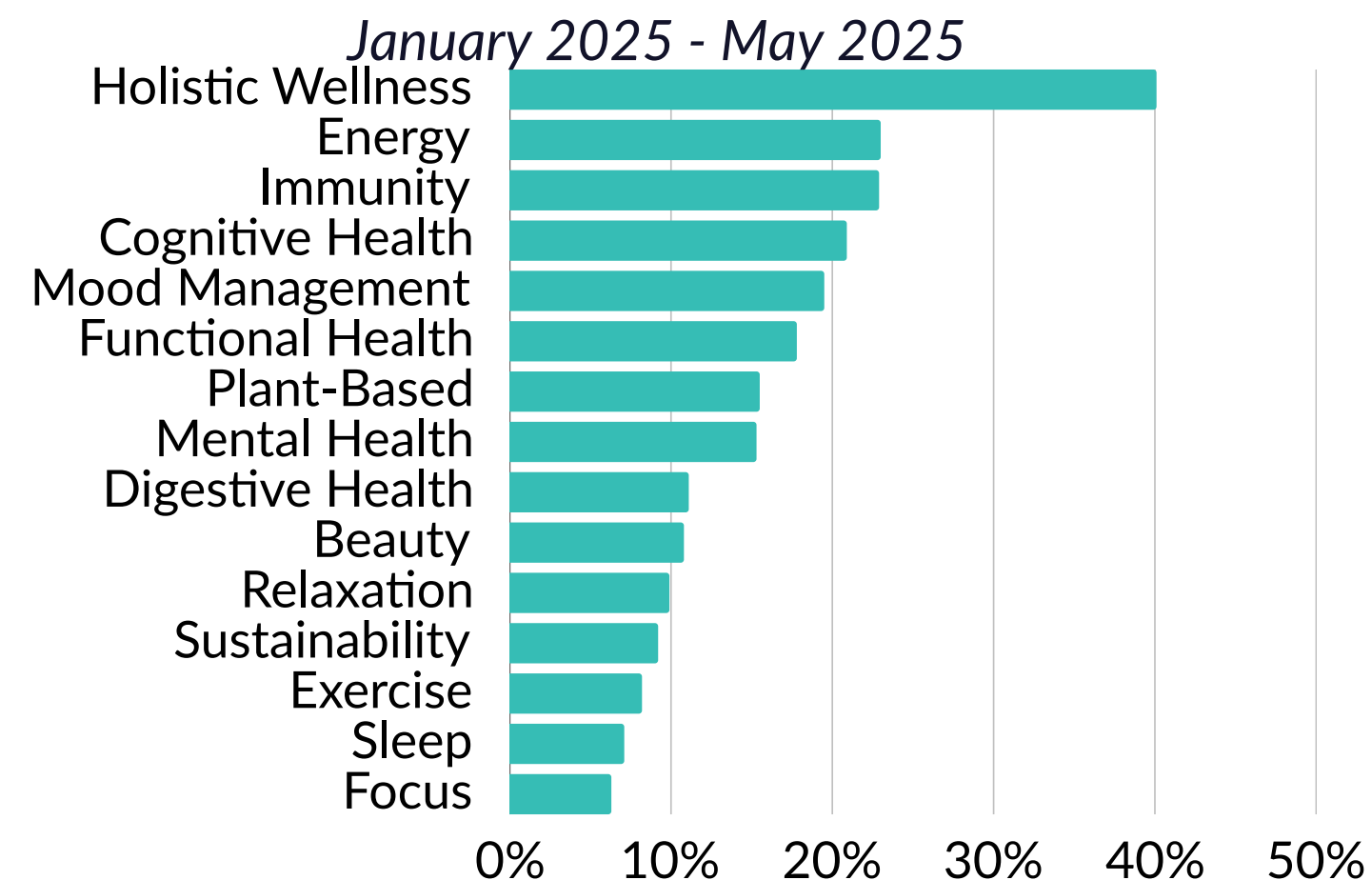
Honing in on discussions of functional mushroom ingredients reveals a diverse range of need states driving consumer behavior. Approximately 40% of conversations about functional mushrooms revolve around holistic wellness. This is nearly double the next-ranked need states, underscoring how consumers view mushrooms as part of a broader self-care routine. Other top themes, such as energy, cognitive health, digestive support, and mental health, reflect demand for ingredients that address both mind and body.

When it comes to product claims, shoppers are signaling clear preferences: terms like “organic,” “superfood,” and “antioxidants” dominate the conversation, highlighting a desire for clean, natural, and functional attributes.

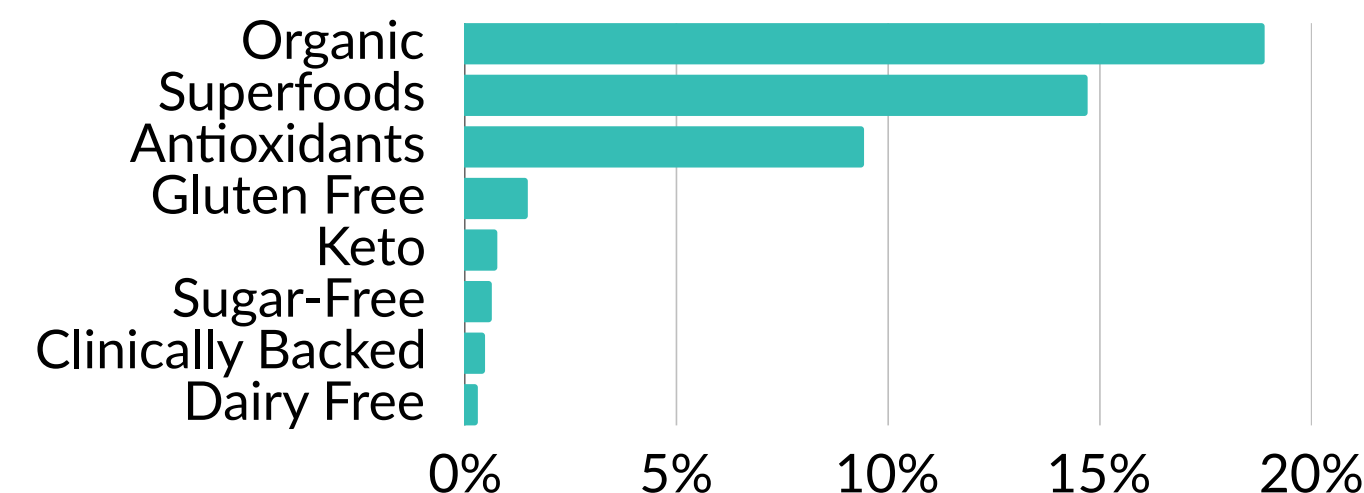
These insights suggest that successful mushroom brands will be those that speak to both emotional needs and scientific credibility in their messaging.



% of Mushroom Conversations by Need State



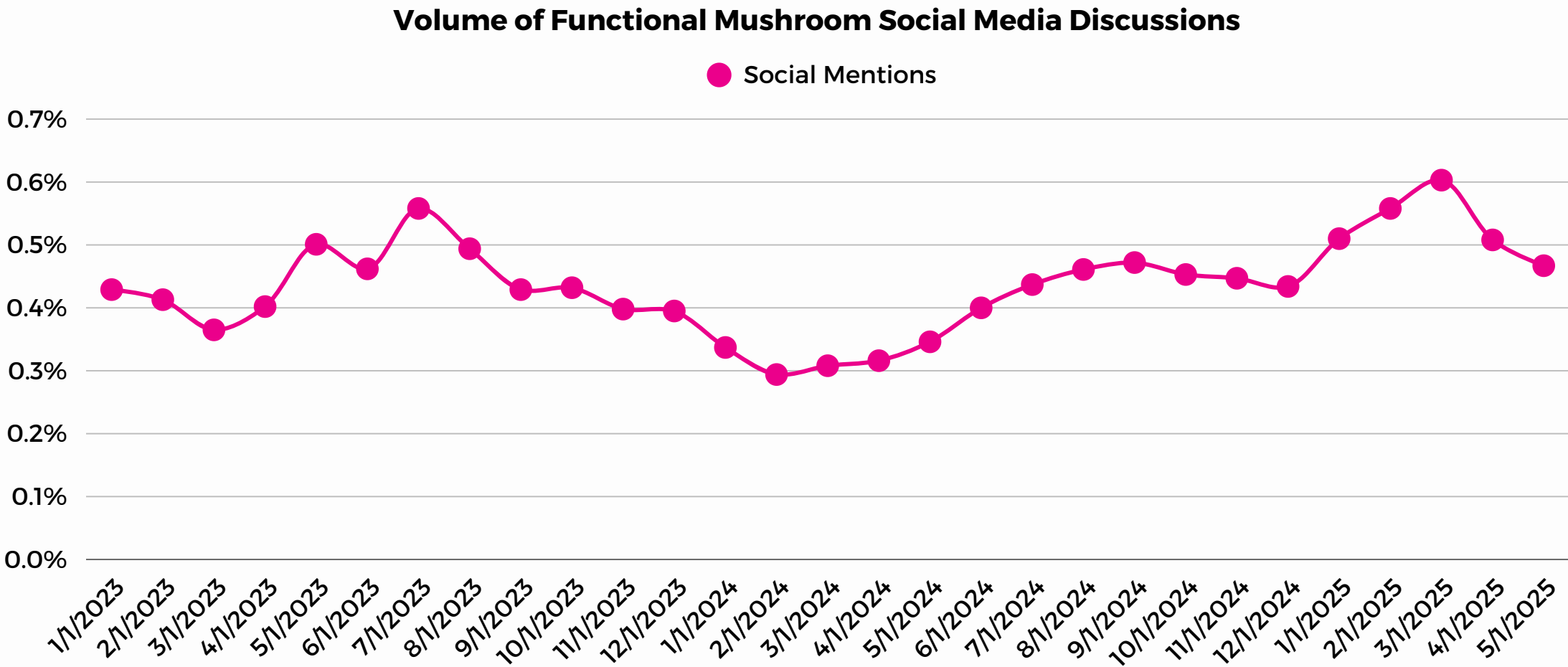
% of Mushroom Conversations by Claim



“Functional Mushroom” Social Chatter

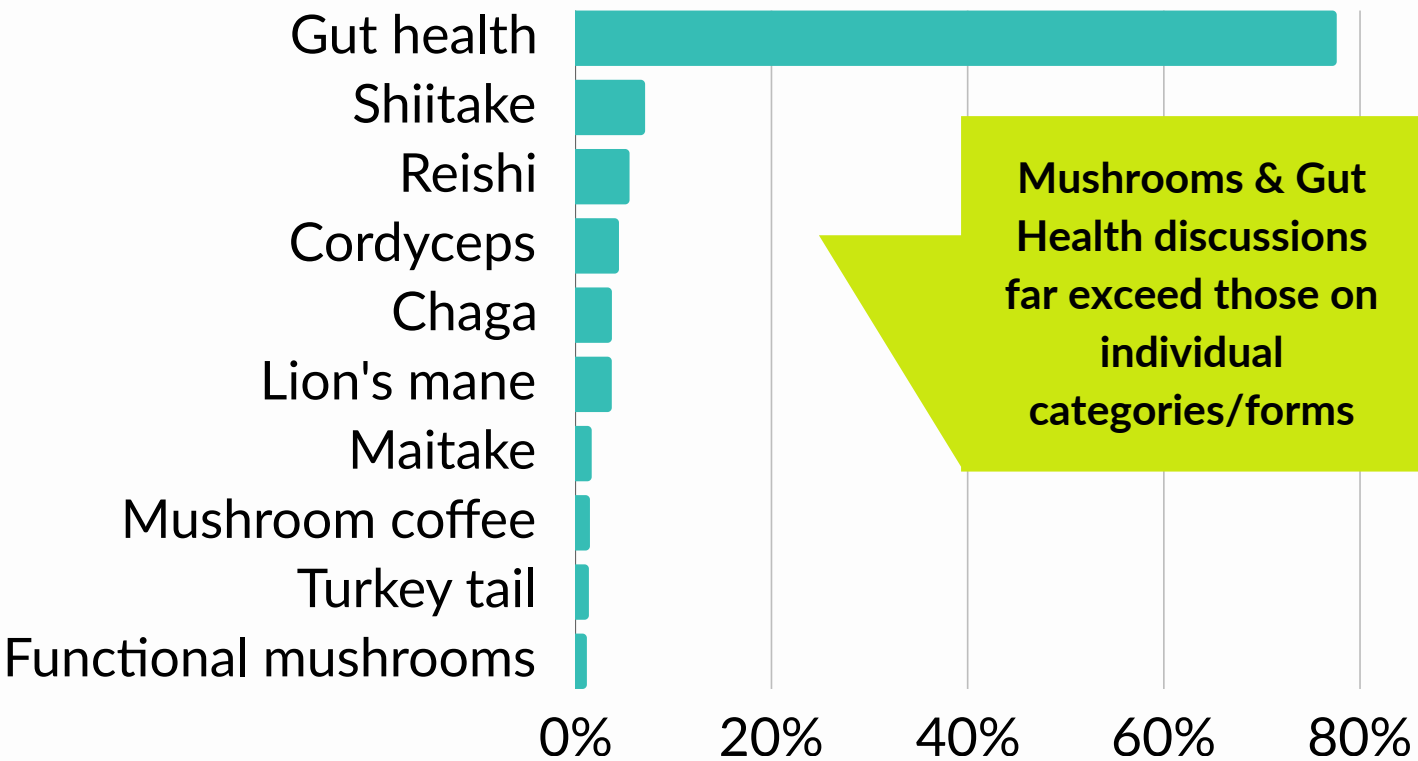
Continuing with social listening data, conversations about 'functional mushrooms' more broadly were up year-over-year in 2025, suggesting broad interest in the category, even if talk surrounding specific ingredients/mushroom varieties has somewhat slowed.

The fastest growing social terms/topics with at least a 0.1% share of category conversation include Lion’s Mane (+96%), Functional Mushrooms (+76%), Immunity & Wellness (+55%), Mushroom Blends (+39%), Mushroom Coffee (+24%) and Energy & Endurance (+23%), reflecting growing interest in uses surrounding physical health.



Source: Brightfield Group; Wellness Social Listening; June 2025

Keyword Contribution to Functional Mushroom Mentions



Functional Mushroom Consumer Demographics

Brightfield Group General Population Survey



62%
Have children
at home



40%
Millennial
generation



28%
have a graduate
degree or higher

Functional mushroom consumers (ingredient and/or product) skew male, married, and upper income with children at home.

A plurality of them are Wellness Seekers (57% more than the total sample), health-focused consumers who tend to be a loyal purchaser segment.

Category purchasers tend to prefer alternative medicine to more traditional products. These may help assist their above-average levels of stress, which they are more likely to use exercise to help manage.

[More Insights by Product Purchasing in Wellness Consumer Insights!](#) 



51%
Stressed or
very stressed



73%
Prefer alternative to
traditional medicine

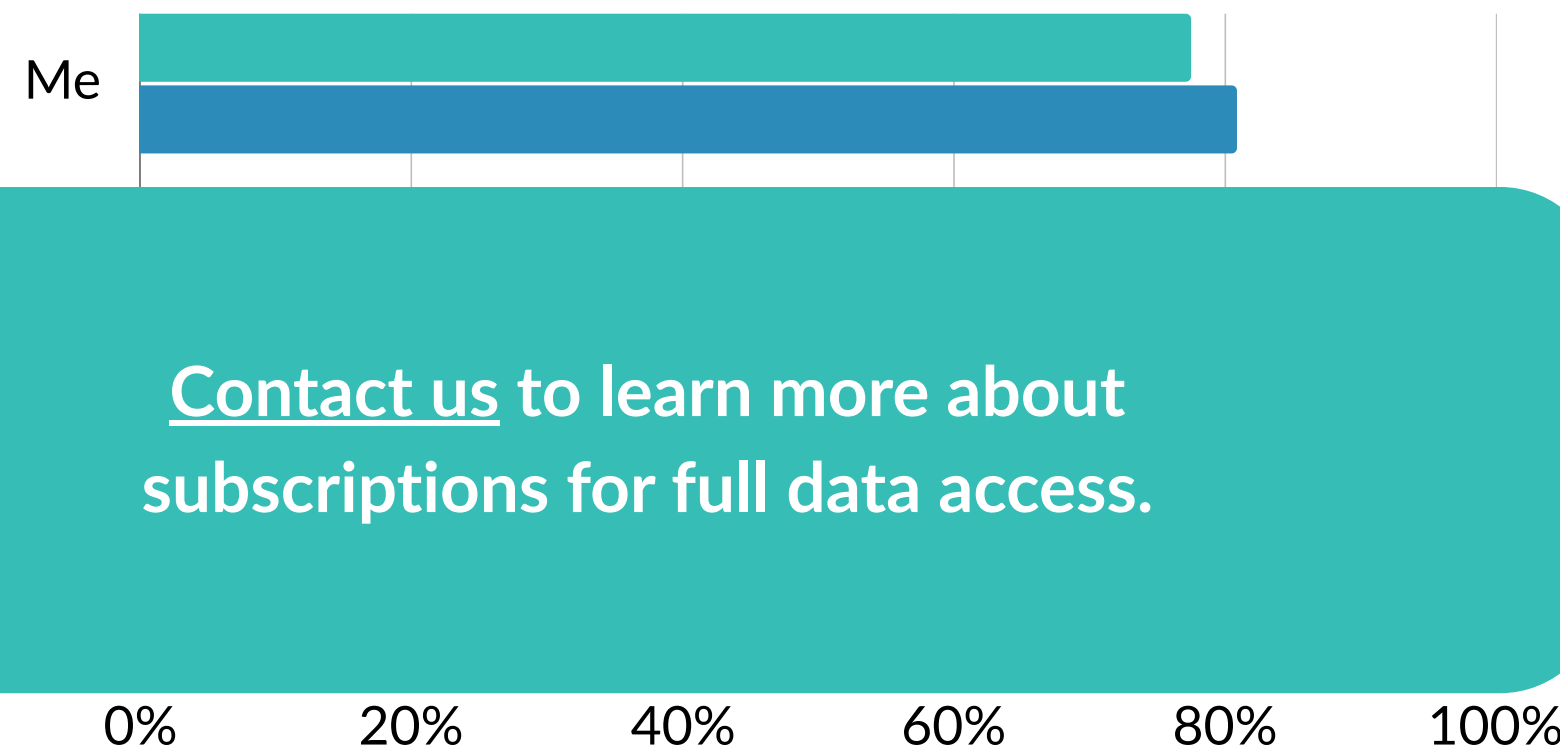


70%
Exercise 3+ times
weekly

Over 50% of functional mushroom shoppers started in the past 6 months, suggesting consumers are still entering the category rapidly

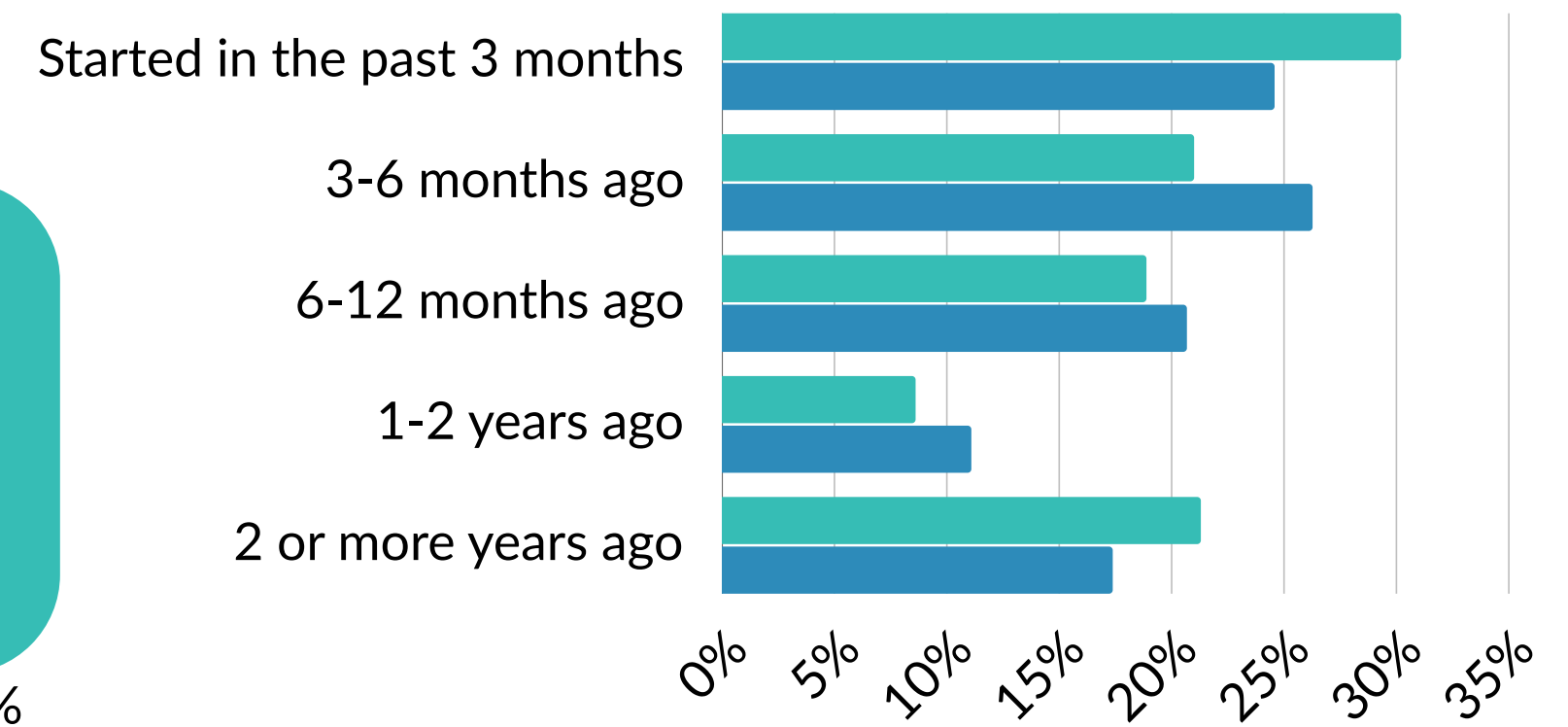
Who Consumes

● Q2 2024 ● Q2 2025

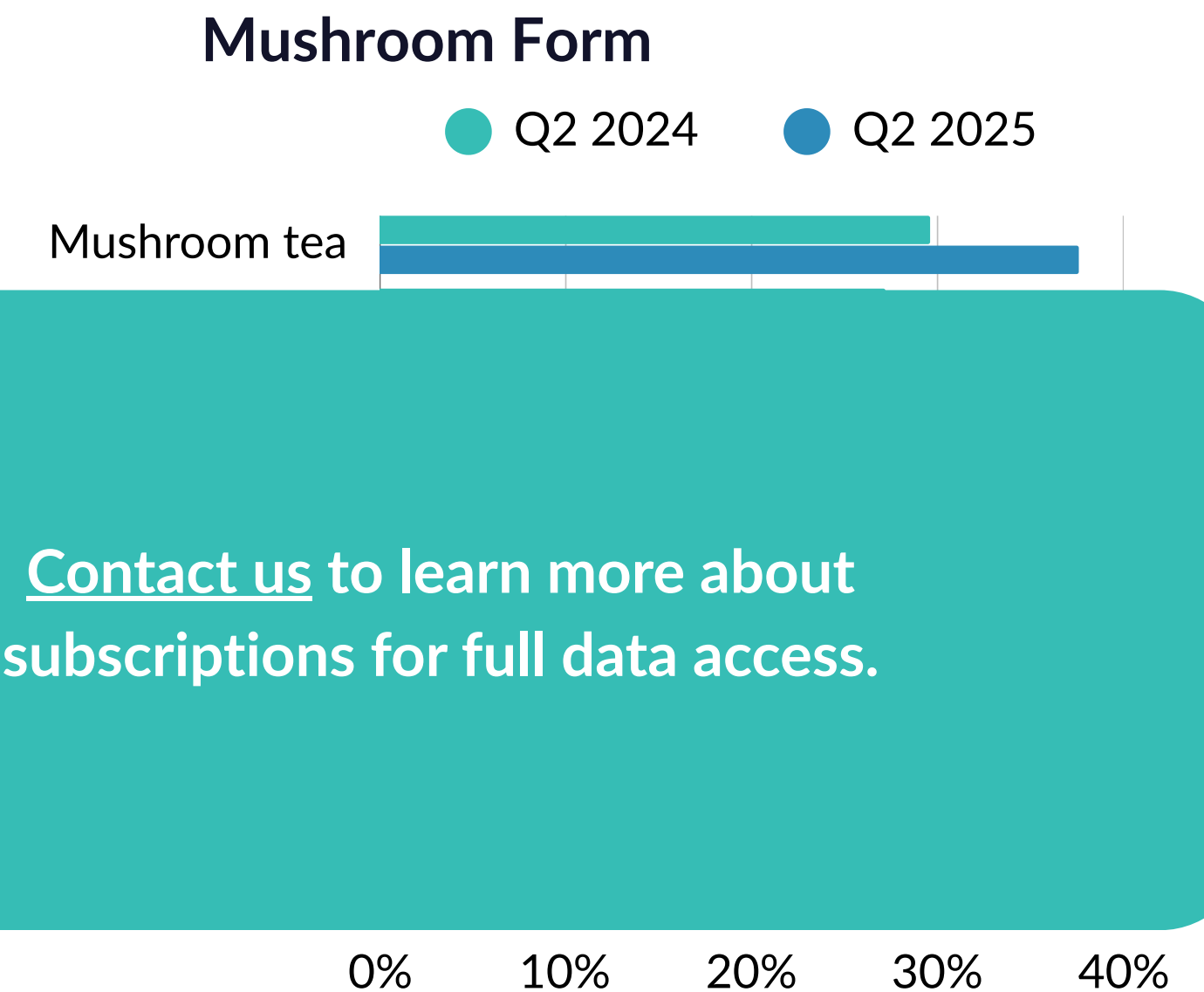
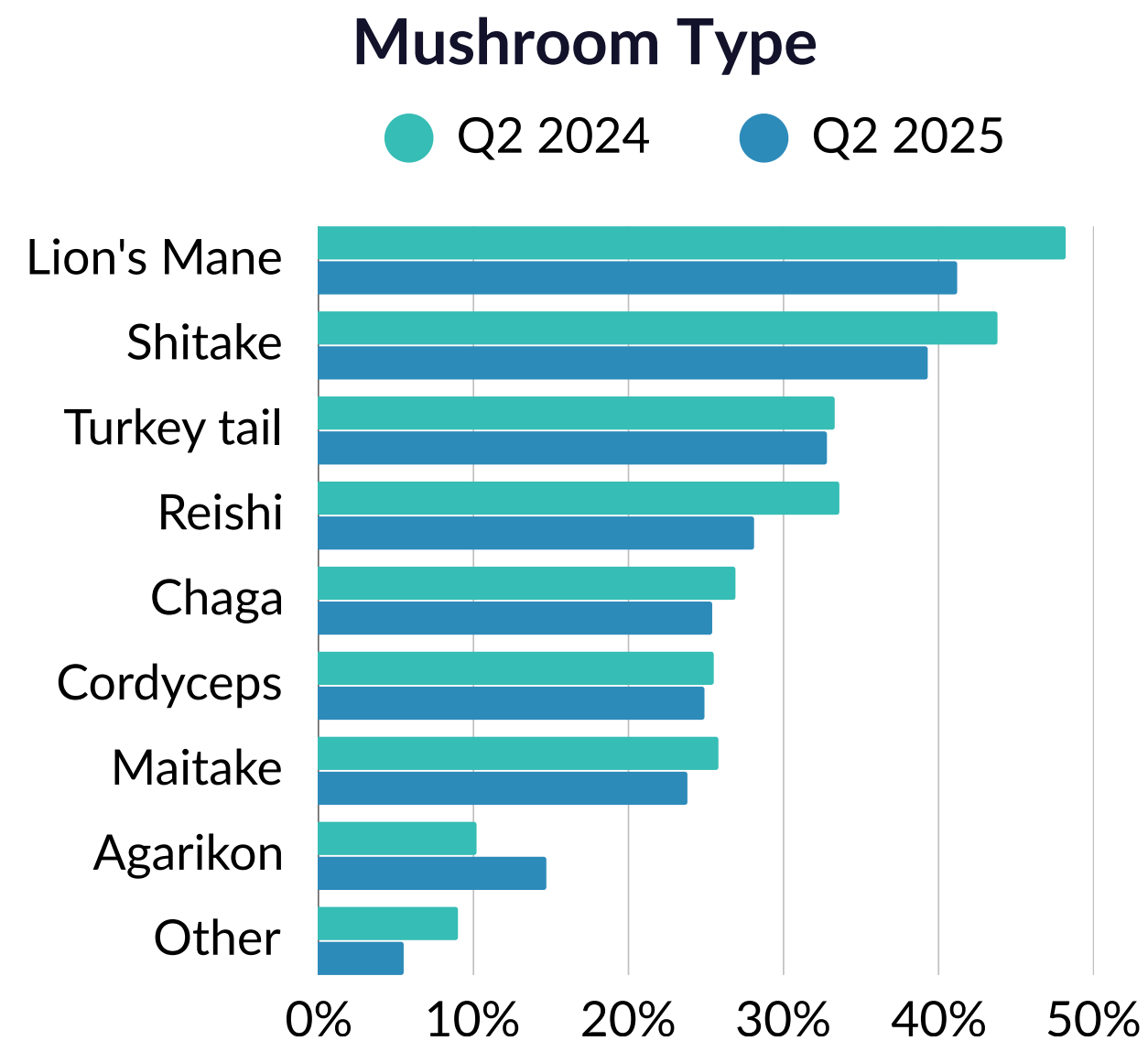


Usage History

● Q2 2024 ● Q2 2025



In general population consumer data, Shiitake mushrooms are the most popular functional ingredients but Cordyceps have been growing faster



Purchases via mass merchandisers increased year-over-year. Additionally, consumers reported a wider array of “purchase reasons,” indicating a variety of positioning opportunities.

Contact us to learn more about subscriptions for full data access.

Full Data Includes:

Purchase Drivers

Purchase Channels

First-Time Usage Drivers

Products Replaced by Mushrooms

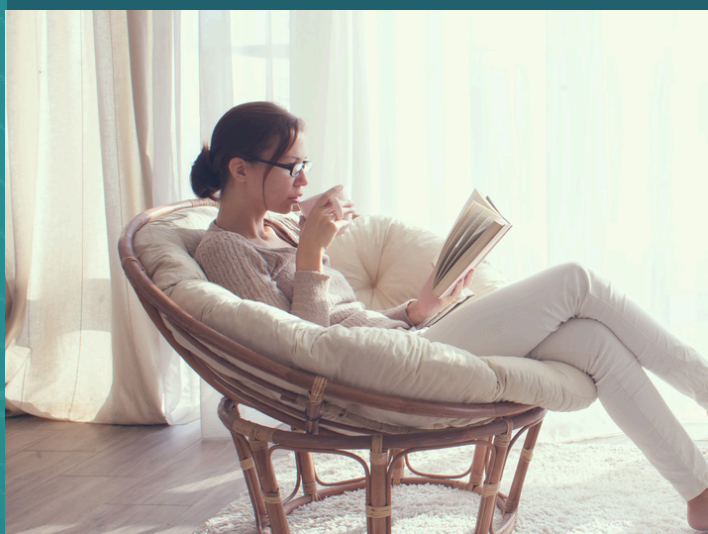
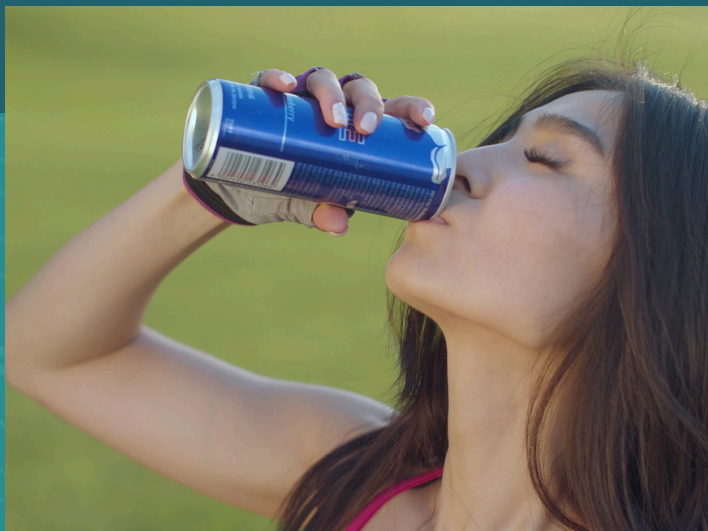
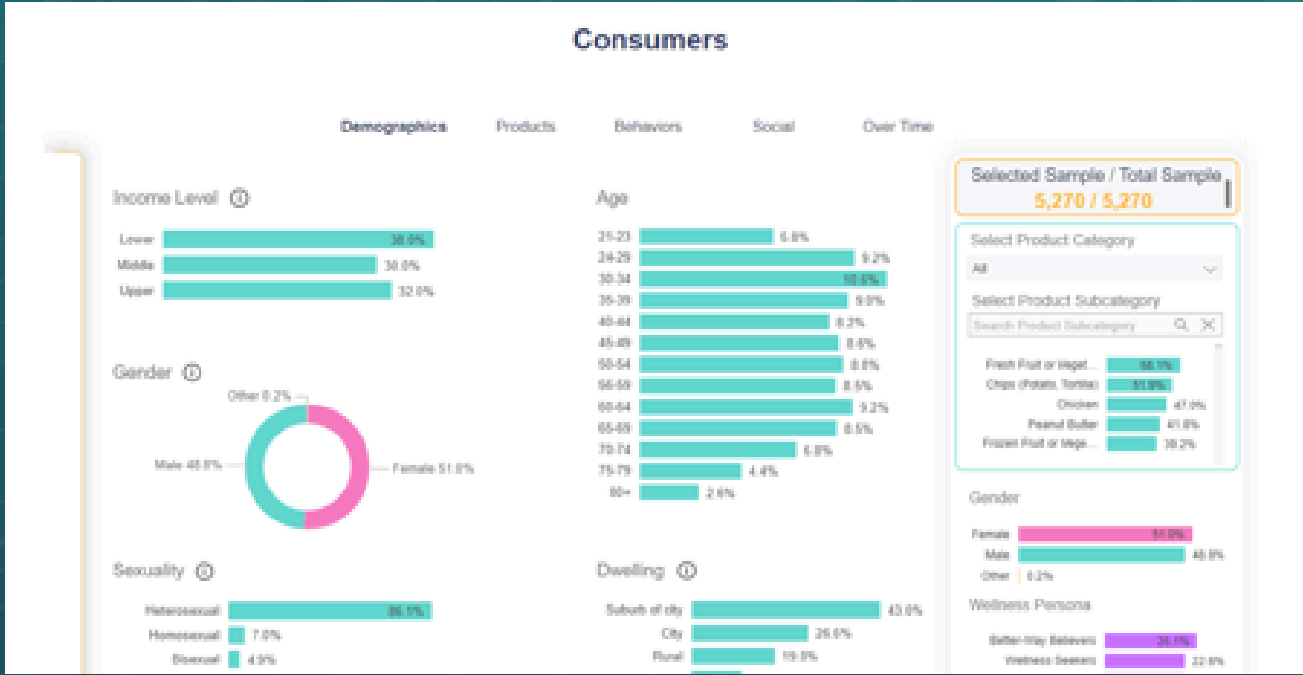
...and dozens more insights, charts, and filters available in the portal.

Stay ahead of all the wellness trends!

Dig into the insights with Brightfield Consumer Insights & Social Listening

Explore Consumer Insights

Explore Social Listening



Questions?
Get in Touch!



About Brightfield Group

Brightfield Group is the leading social listening-enabled research firm serving the U.S. wellness industry. We combine traditional consumer survey research with AI-integrated social listening to provide a deeper level of consumer insights.

Marketing, innovation, and insights leaders have trusted us to help drive customer-centric strategies since 2015. Our AI-driven consumer insights and social listening help marketing and innovation teams see the person behind the trend.



 BRIGHTFIELD GROUP

Built by insights people for insights people!

SURVEY DATA + **SOCIAL LISTENING**

Over 80,000 consumers surveyed

Questionnaire fielded quarterly since Q3 2021 with dynamic edits to account for the latest trends over time

Quotas & weighting were used to achieve a nationally representative sample, including age, gender, income, & region

Wellness-oriented questions that reveal attitudes, behaviors, & purchasing of over 150 products

Over 50 million conversations collected since 2021

Posts tagged by Need State, Product, Ingredient, Flavor, & Condition using AI-enabled machine-learning & natural language processing

Posts pulled based on wellness-focused hashtags & topics

Neural network training to help AI predict gender, age, and persona



Overall Posts by Ingredients

Aug 2023

- Chaga Mushroom: 0.37%
- Lion's Mane: 0.47%
- Reishi Mushrooms: 0.73%

Ingredients Growth Rate

Ingredient	Growth Rate
Chaga Mushroom	7.14%
Lion's Mane	25.48%
Reishi Mushrooms	25.79%