

Beverage Trends Q4 2025

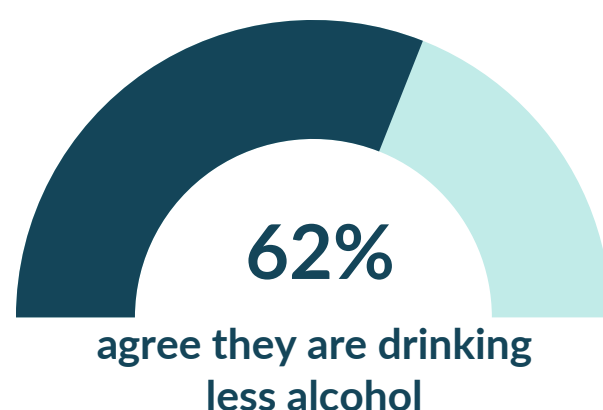
WELLNESS TRENDS

The Rise of Moderation and the Evolution of Better-For-You Beverages

Tracking the Shift Toward Alcohol Moderation

Alcohol moderation has moved firmly into the mainstream. In Q4 2025, nearly **62%** say they are consuming less, signaling that moderation has moved beyond a temporary wellness phase into a sustained lifestyle change.

Health is the primary catalyst. Consumers increasingly connect drinking less with improved physical wellbeing, stronger mental clarity, and a greater sense of control over their lives. While financial savings contribute, the broader shift reflects a proactive effort to enhance overall quality of life, reshaping social rituals and everyday beverage choices.



Top 3 Consumer Reported Alcohol Substitutes:

36% Coffee / Tea

30% Soda / Pop

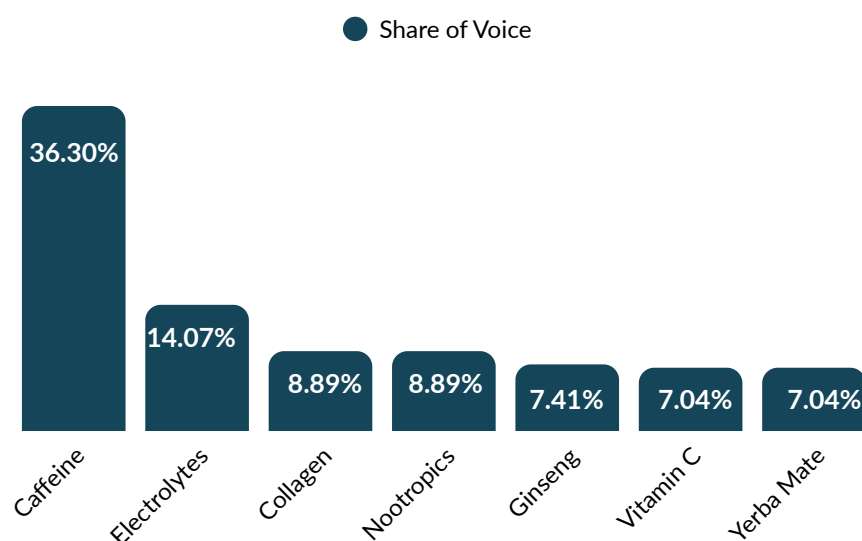
18% Sparkling / Soda Water

Functional and familiar formats are winning share of occasion.

Social conversation around Clean Energy Drinks

Clean Energy Drinks are expanding their cultural footprint. Since early 2024, social share of voice has steadily increased, accelerating through 2025 and reaching new highs entering 2026, reinforcing the rise seen in purchase behavior.

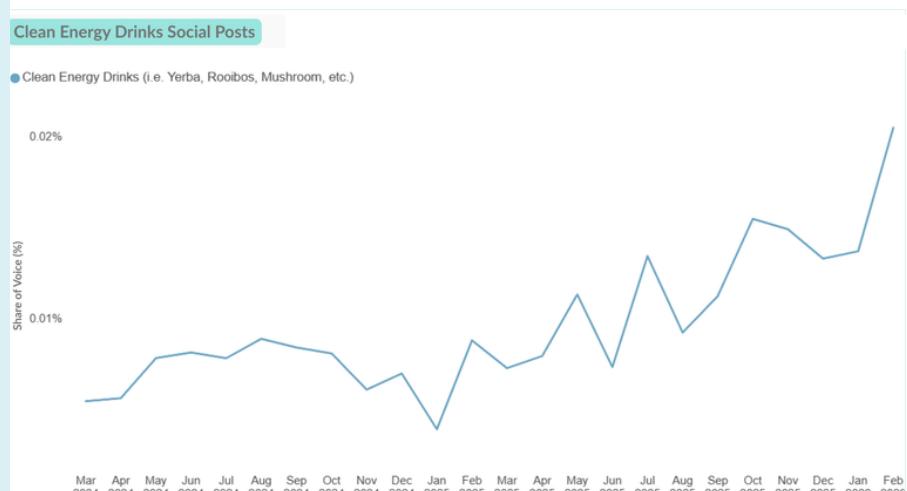
This sustained climb signals structural category growth, not temporary buzz. As consumers engage more with mushroom coffee, yerba-based energy, and nutrient-forward formats, clean energy is moving into mainstream consideration. Rising social visibility and purchase growth signal clean energy is entering the mainstream, creating a clear window for functional innovation.



Functional Beverages Redefine Energy

Better-for-you beverages continue to gain traction, with lower-sugar and functional sodas holding steady through 2025, signaling sustained consumer interest in reformulated classics that deliver both flavor and functionality.

The strongest momentum is in functional drinks, with purchase rising from **24% in Q3 2024 to 32% in Q4 2025**. Energy is being redefined beyond traditional energy drinks, shifting toward cleaner, nutrient-forward options like energy coffee, protein coffee, mushroom coffee, and other fortified options. Consumers are prioritizing sustained energy and added benefits, creating clear whitespace for brands that deliver functionality with wellness credibility.



Caffeine Anchors, Functionality Differentiates

Ingredient-level conversation shows caffeine firmly at the center of clean energy dialogue, commanding over one-third of share of voice. However, the surrounding ingredients tell the real story of evolution — electrolytes, collagen, nootropics, ginseng, vitamin C, and yerba mate are all prominent in discussion.

Rather than replacing caffeine, brands are reformulating around it. Consumers are responding to energy solutions that combine stimulation with hydration, cognitive support, and added nutritional benefits — signaling demand for multi-functional blends that go beyond basic energy delivery.

Brands Leading the Clean Energy Conversation

Clean energy dialogue is driven by both established leaders and emerging disruptors.

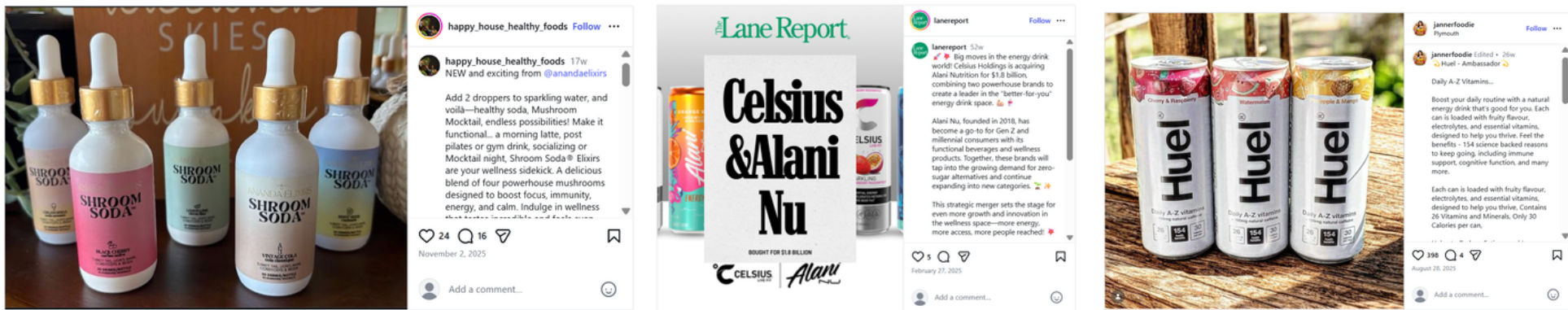
CELSIUS® maintains strong share of voice, positioning itself as a better-for-you performance energy brand. Up and coming players like **Magic Mind** are notable for the “calm” energy positioning.

Yerba Madre (formerly Guayakí) anchors plant-based caffeine in the conversation, reinforcing yerba mate as a clean energy staple.

Emerging mushroom-forward brands like **RYZE** are gaining visibility, reflecting rising interest in adaptogenic and nootropic support layered onto caffeine.



Conversations: Dig into Actual Posts & Influencers with Brightfield's Social Listening Tracker



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