Functional Beverage Trends
Q1 2026

BRIGHTFIELD GROUP

Sources of Data: Wellness CPG Platform
Brightfield Group employs a distinctive methodology that combines Consumer Surveys and Social Listening to reveal emerging trends and understand why they resonate with consumers.

Key Components:
Sample Size: This module includes survey data of 90,000 consumers from the general population.
Social Listening Tracker: This tool analyzes more than 100 million conversations.

CALM: THE NEW ENERGY

How consumers are redefining modern energy with botanicals, magnesium, and adaptogens

The Energy Conversation Is Shifting

Consumers are moving away from “more energy” toward calm-focus formulations that deliver steady stimulation without the edge.

In Q1 2026, six botanical beverage subcategories reached breakout status simultaneously across both social conversation and consumer purchase behavior.

Magnesium Bisglycinate led ingredient growth at +619% YoY, followed by GABA (+321%) and Glycine (+291%).

Magnesium Bisglycinate

+619%

YoY growth

Top 3
Ingredients Driving the Calm-Focus Shift

+619%	Magnesium Bisglycinate
+321%	GABA
+291%	Glycine

Mechanism-forward ingredients are becoming the new language of functional energy.

Botanicals Are Expanding the Energy Category

Tea with Adaptogens led social growth at +894% year over year, followed by Yerba Mate (+321%), Botanical-Infused Soda (+273%), and Mineral Water (+170%).

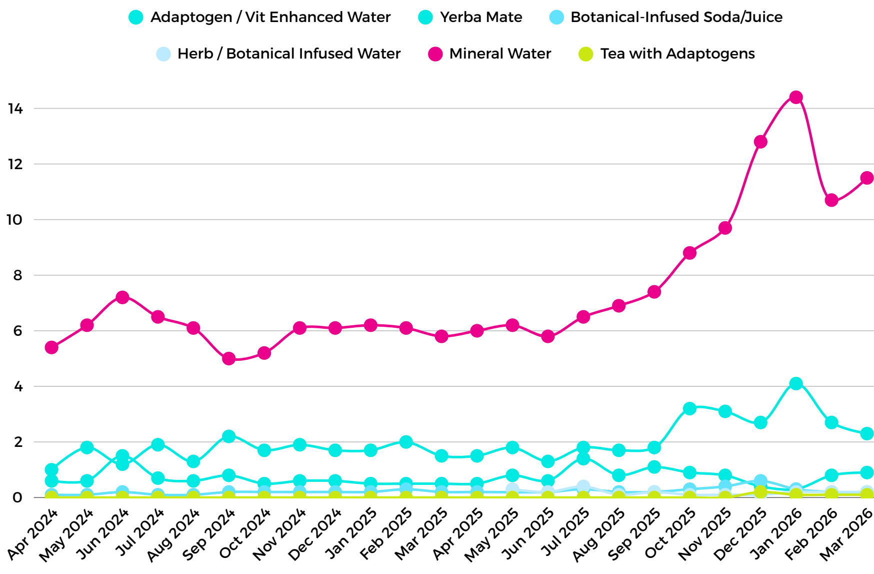
Passion scores between 87–95 suggest consumers are deeply engaged — not just experimenting.

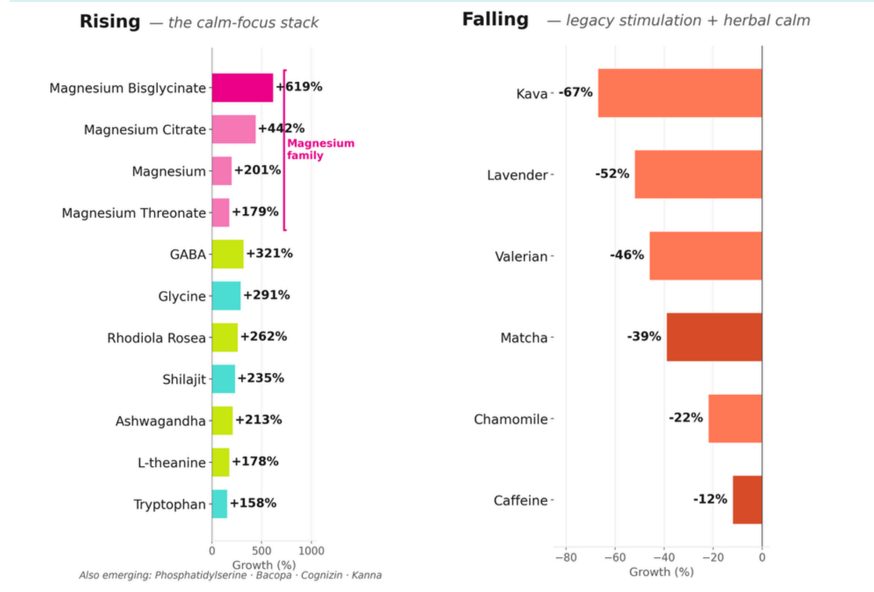
Brands combining botanicals with magnesium are claiming the white space between energy and relaxation. No incumbent owns it yet.

Calm-Focus Is Building Sustained Momentum

Since Q1 2025, social share of voice across botanical beverage subcategories has steadily climbed, reinforcing signals already emerging in consumer purchase data.

When multiple beverage formats trend simultaneously, it signals category evolution rather than a short-term fad.





From Stimulation to Controlled Energy

The rising ingredients are mechanism-forward: Magnesium Bisglycinate +619%, GABA +321%, Glycine +291%, Rhodiola +262%, Ashwagandha +213%. The magnesium family alone is reshaping functional beverage formulations.

The falling side is equally telling. Kava down 67%. Lavender -52%. Matcha -39%. Caffeine itself off 12%. Consumers aren't rejecting energy, they're rejecting the blunt instrument. They want stimulation they can explain.

Phosphatidylserine, Bacopa, and Cognizin are warming up in the wings.

Brands Leading the Calm-Focus Shelf

The calm-focus shelf is being built by both specialist wellness brands and mainstream beverage crossovers.

Recess leans into magnesium and botanicals for approachable relaxation. **Magic Mind** combines adaptogens with cognitive-support ingredients. **Kin Euphorics** and **De Soi** are reframing functional beverages around mood, ritual, and alcohol alternatives.

But botanical buyers don't shop one lane. They put **Poppi** (38.8%), **Celsius** (32.5%), and **Calm drink mix** (26.7%) in the same basket — then layer in the specialists. Calm-focus is an add-on behavior, not a replacement.

The Influencers Mainstreaming Calm-Focus

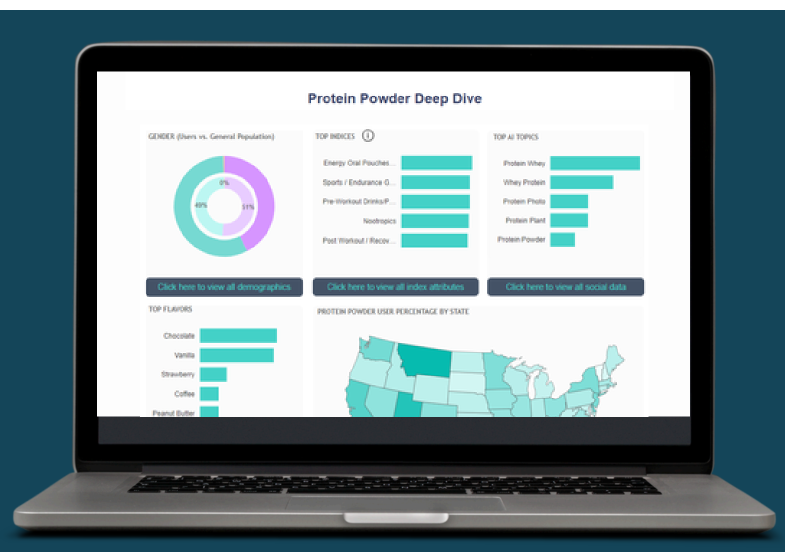
Wellness creators, physicians, and performance influencers are helping normalize calm-focus routines among mainstream consumers.

From magnesium glycinate rituals to adaptogen stacks, the conversation has moved from niche biohacker forums to top-5 podcasts and million-follower TikTok feeds.

Brightfield Group’s AI-driven consumer insights and social listening help marketing and innovation teams see the person behind the trend.

Informed by predictive AI integrated with survey and social media data, Brightfield Group data has the answers innovators need to make brand and product decisions that grows their business.

It’s a level of depth you can’t find anywhere else.



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