

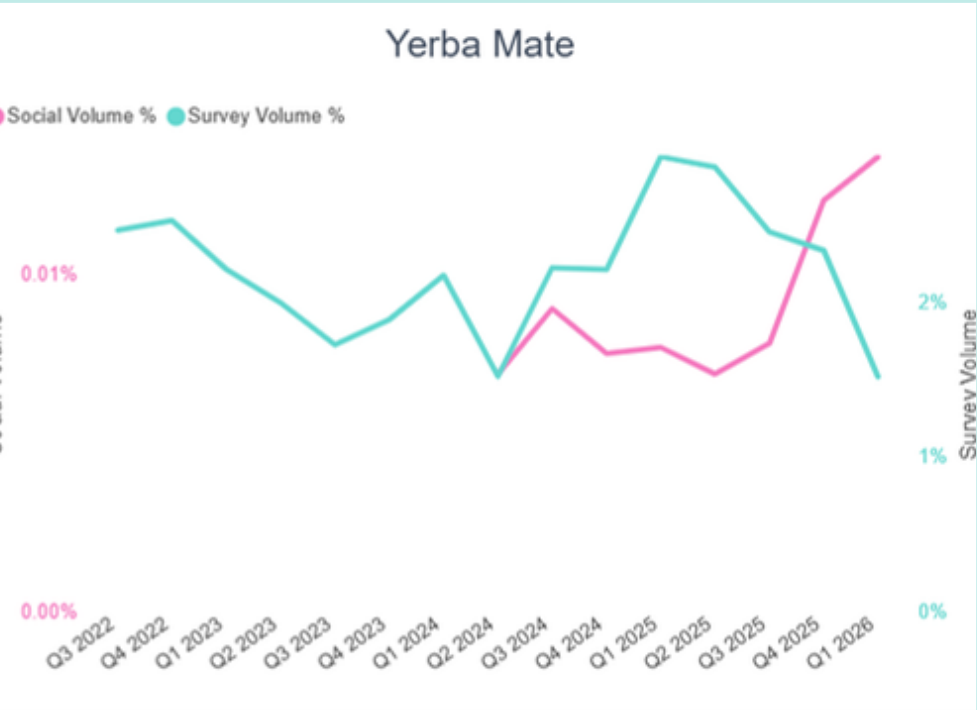
THE CALM-FOCUS SHELF

A Closer Look at Three Breakout Formats

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.

Consumers don't want energy anymore. They want control. These three formats show where that demand is building now.



+72.3% Social Share of Voice YoY

Yerba Mate: Clean Energy With a Credibility Problem

Social share of voice grew 72.3% YoY, with Millennials (51.1%) and Better-Way Believers (35.1%) driving the conversation.

Consumers frame it as the calm-focus alternative to coffee — steady caffeine, no crash, no jitters.

The positioning is strong. The risk is also visible: a significant share of content is affiliate-driven, pushing metabolic and detox claims that undermine the clean energy story brands are trying to own.

ACTION Emphasize credible energy/focus positioning; monitor misleading health-claim narratives.

Consumer Conversation Snapshot: Yerba mate is framed as a clean energy alternative to coffee — steady caffeine, calm focus, no crash. Positioned within morning wellness routines and clean-ingredient guidance. Monitor: a significant share of content pushes metabolic, detox, and belly-fat claims via affiliate channels, often through DMs. This narrative undermines credible energy positioning if left unaddressed.

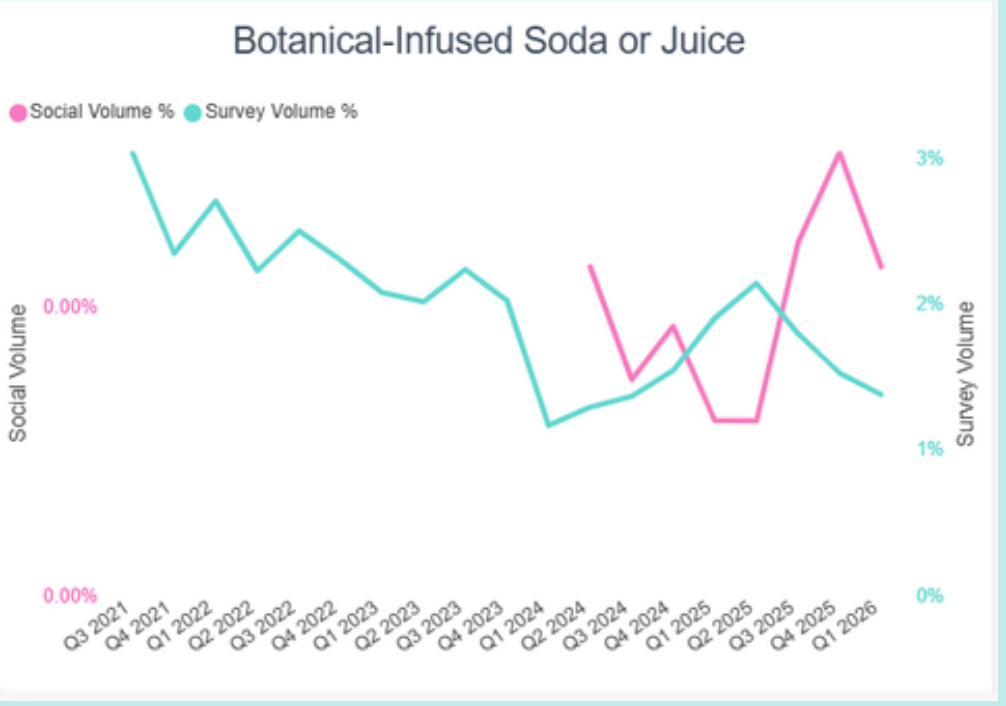
+88.2% Social Share of Voice YoY

Botanical Soda: Ritual Is the Real Differentiator

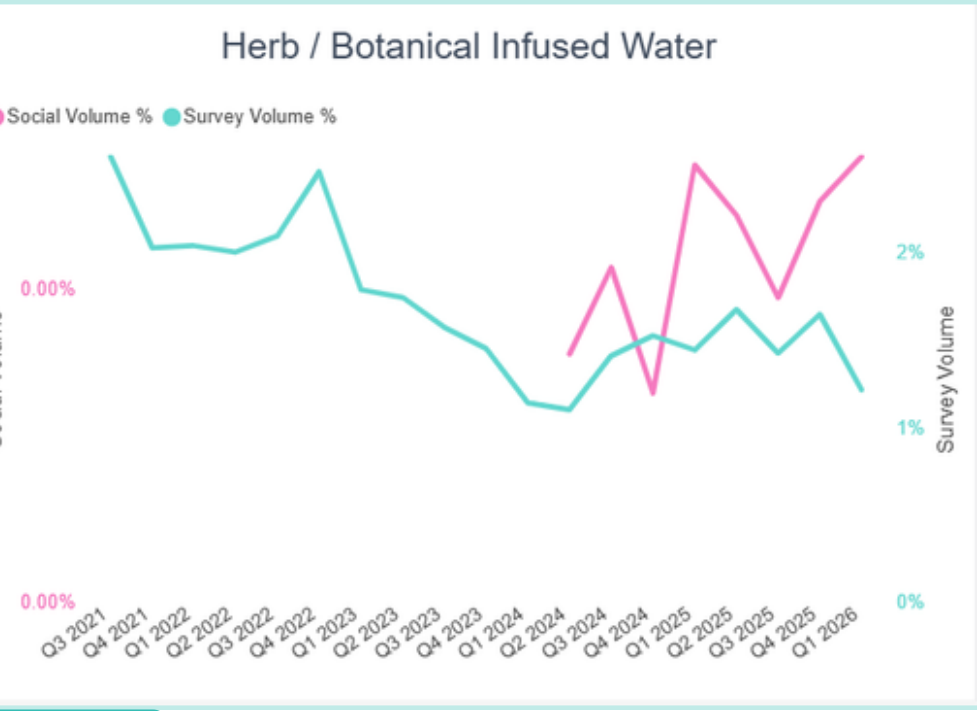
The strongest social growth of the three formats at +88.2% YoY. Conversation frames botanical-infused drinks as functional wellness, not flavored soda. Clean-label and ritual-forward positioning is what is resonating.

Wellness Seekers make up 41.2% of buyers versus 18% of the general population. Millennials lead at 56.3%.

The window to own the ritual moment is open. It will not stay that way.



ACTION Lean into ritual + clean-label, but verify claim credibility.



+92% Social Growth Rate YoY

Botanical Infused Water: The Positioning Window Is Still Open

Social growth rate reached 92% YoY, earning a 4-star trend score. Conversation frames these drinks as healing and wellness-supporting, tied to specific botanicals — hibiscus, rosemary, chamomile, lemongrass.

Wellness Seekers (34.3%) and Trendy Enthusiasts (28.6%) are the early adopters.

This format is earlier in its curve than the other two, which means the narrative is still being written. Brands that move now on credible benefit claims and clean-label positioning have first-mover room.

ACTION Focus on healing benefit claims with ingredient specificity. The narrative window is open. Own it before it defaults to generic wellness.

Who Is the Calm-Focus Shelf Consumer?

- Across all three formats, the buyer profile is consistent. **Millennials** lead in every subcategory:
- 51.1% for Yerba Mate
 - 56.3% for Botanical Soda
 - 48.6% for Botanical Infused Water



Wellness Seekers and Better-Way Believers dominate, signaling a consumer who is actively looking for better options, not just experimenting with trends. Upper income, urban-skewing, and already cross-shopping across functional categories.

This is not a niche cohort waiting to be discovered. It is the same consumer driving the broader calm-focus shift — and they are building their shelf one format at a time.

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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