

FROM DRINKS TO SNACKS

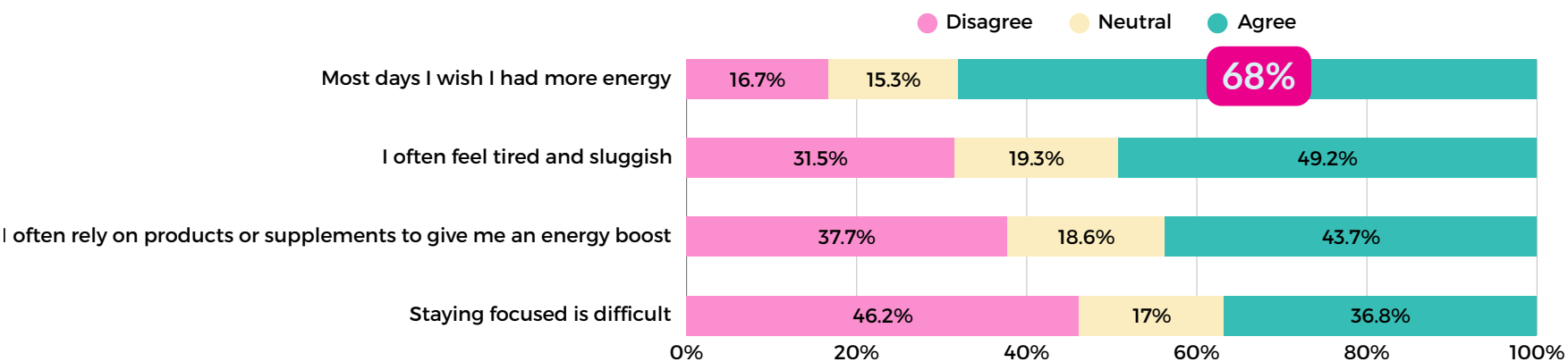
Calm-focus jumps the aisle

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.

The calm-focus consumer who reshaped functional drinks has not changed their mind, only their aisle. This is what they are reaching for in snacking now.

Amongst US General Population Adult Consumers: Psychographics Statements



Nearly 7 in 10 want more energy. The question is what kind.

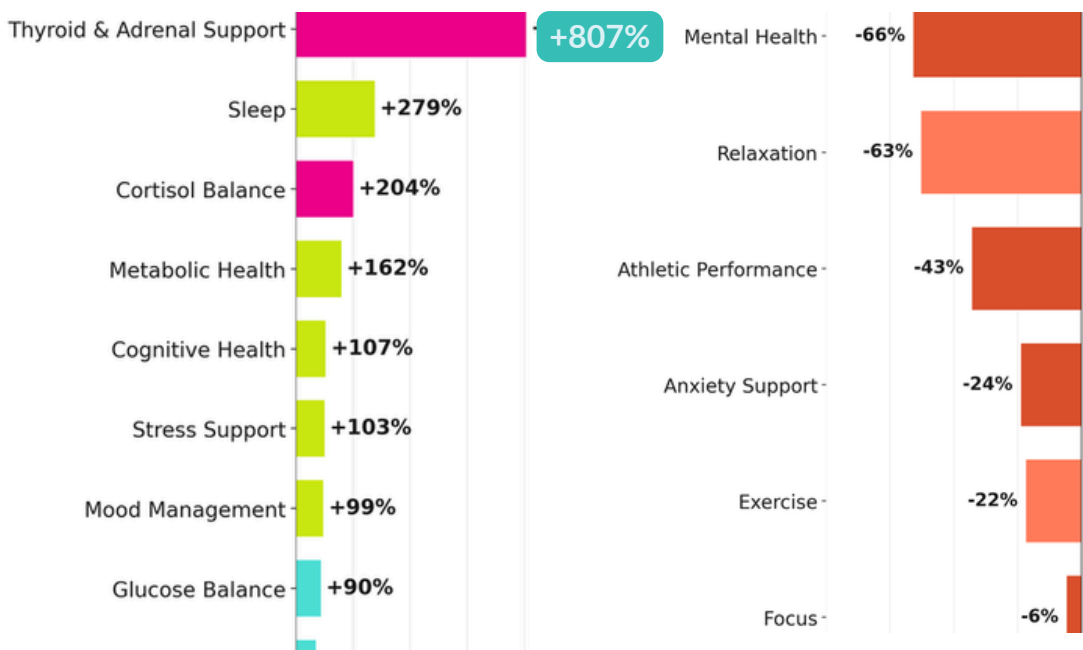
Energy is everywhere in snacking now. What counts as a lift is what is changing: less about a caffeine hit, more about focus, mental clarity, and steady performance. The brands breaking out are building around cognitive-focus ingredients, not stronger stimulation.

ACTION

Compete on the kind of energy, not the amount. Lead with steady and focus-first.

Rising

Falling



What snackers ask for is getting more biological.

Consumers are trading broad framings like mental health and relaxation for specific systems: thyroid and adrenal support, cortisol, metabolic health, circadian rhythm.

It is the same calm-focus thesis from the drinks aisle, now dressed for snacking.

ACTION

Speak in systems, not symptoms. Name cortisol, sleep, and metabolic benefits over generic wellness.

One shift, showing up twice. The same move away from blunt stimulation is reshaping both what consumers ask for and what they reach for, toward systems and ingredients they can name and explain.

The snack pantry is getting smarter.

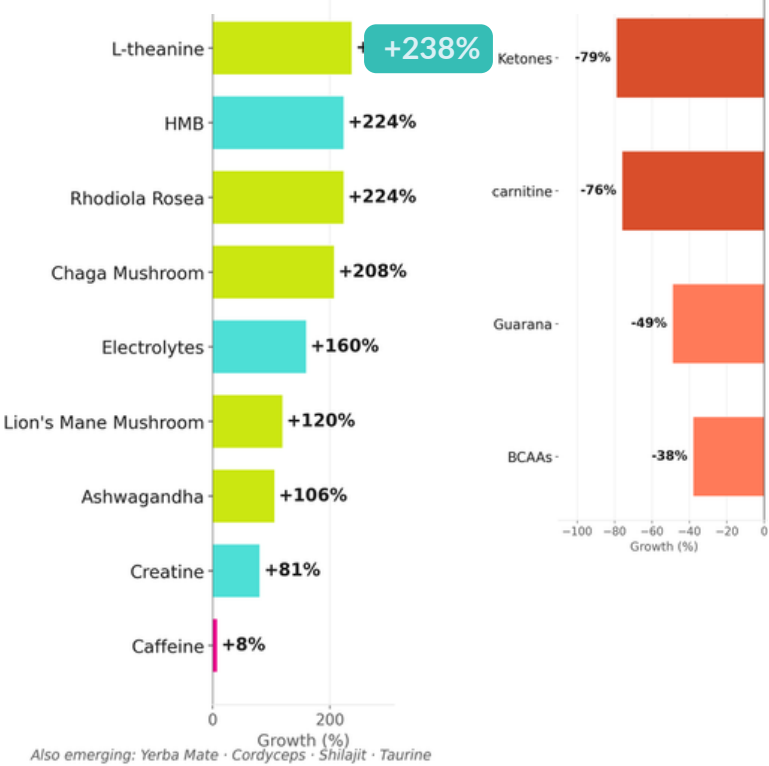
Mushrooms and amino acids are doing the work pre-workouts and BCAAs used to do, and consumers can name them. L-theanine, Rhodiola, Chaga, and Lion's Mane are rising while ketones and BCAAs fall. Caffeine is holding, not leading.

ACTION

Lead with nameable, mechanism-forward ingredients. The cognitive stack is the new pre-workout.

Rising

Falling



+58%

social growth for energy snacks, year over year

Energy snacks broke out after a Q4 2025 inflection, as consumers reached past simple caffeine toward focus.

ACTION

Move early. The category broke out only last quarter, and the formats are still being defined.

Who Is the Calm-Focus Snack Shopper?

Male and Millennial, with Gen Z close behind. Upper income, urban, and college-educated. They map to Brightfield's Wellness Seekers and Trendy Enthusiasts, a high-intent cohort ready for the next wellness-forward formats.

Millennial: 48.8%
Gen Z: 25.2%

Male: 65.7%

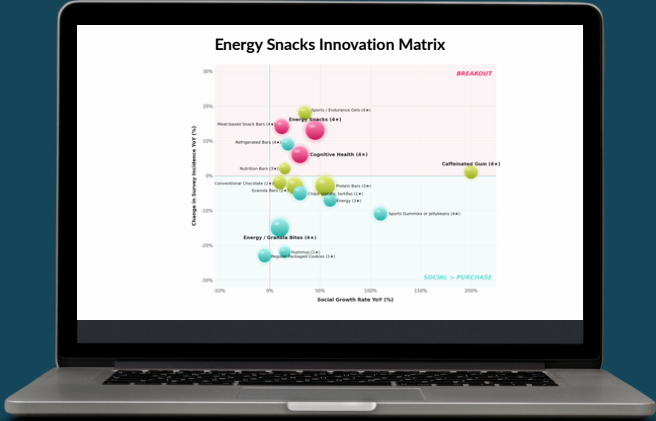
Wellness Seekers: 38.7%
Trendy Enthusiasts: 19.6%



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.



Learn More

