WHITESPACE RESEARCH REPORT

A Fragmented Category

Where is the most room for innovation in *functional foods?*

A whitespace analysis of pills, gummies, snacks, beverages, powders, and other formats, and consumers' (dis)satisfaction with how they solve problems like sleep, stress, focus, digestion, and more.

About this report

Protein powder. Shakes. Bars. Electrolyte drinks. Ashwagandha capsules. Prebiotics and probiotics. Greens powders. 100-calorie snacks. Melatonin gummies. Caffeine. Every vitamin supplement under the sun. These are popular examples of functional foods, but they don't even scratch the surface of everything available on the market.

In a world where we're encouraged to "optimize" nearly every aspect of our lives, functional foods occupy a cornerstone role in our weekly routines. Is work stress interfering with your sleep, but you don't want to take pharmaceuticals to knock you out? There's a magnesium glycinate pill for that. Are you trying to exercise more regularly and find yourself dehydrated faster? The nearest vending machine has electrolytes galore. Don't even get us started on the protein craze *(protein water? Really?)*

If you have a wellness-related job-to-be-done,
there seems to be a functional food for it.

Or is there?

The functional food category is incredibly fragmented. While it seems saturated, consumers are increasingly skeptical of the supposed benefits that capsules, gummies, bars, beverages, and other formats offer. Do functional foods actually address the problems people consume them for sufficiently? Is there a job-to-be-done consumers *want* a functional food for, but none exists yet?

There is a vast amount of whitespace in this category. To understand the biggest innovation gaps, **we surveyed over 500 consumers to answer the following questions:**

1. Which situational, functional, emotional, and social jobs are consumers trying to solve through functional foods and supplements, and which of those jobs are most underserved today?

2. Which current products, formats, or workarounds consumers leverage to address those jobs are falling short, and where are the clearest points of dissatisfaction or abandonment?

3. Where are the strongest whitespace opportunities across the category, and which opportunity areas are compelling enough to move into concept screening?

4. How do needs and whitespace opportunities differ by consumer approach to functional foods, including segments like advocates, individuals who consume functional foods as necessary, and those who are more skeptical (more on this in a moment)?

We found that the most room for innovation doesn't necessarily correspond with the jobs consumers deem the most critical. Whether you're a supplement brand, snack and beverage producer, other functional food brand, or you're simply interested in whitespace research, continue reading to discover where the biggest opportunities are and our strategic recommendations for taking advantage of them.

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Study Overview

We surveyed **509 US-based consumers** in the summer of 2026, including **403 quantitative respondents** and **106 qualitative respondents** with AI-moderated video questions.

All 509 participants had purchased at least one of two qualifying options in the prior 60 days: 406 reported buying supplements, and 408 reported buying food or drinks with added health benefits.

The study sample skews older, with a mean age of 47.7 (median of 51) with a generational distribution of 33% Gen X, 25% Baby Boomers, 23% Millennials, and 17% Gen Z. Male/female split was 51% and 49%, respectively.

509

US-based consumers surveyed

403 **quantitative respondents**

106 **qualitative respondents**
via AI-moderated video questions.

Three Mindsets Behind Functional Food Use

We grouped consumers into three segments based on their relationship with functional foods, moving beyond traditional demographics.

Biohacker Optimizers

Consumers who actively employ functional foods in **daily or weekly life**

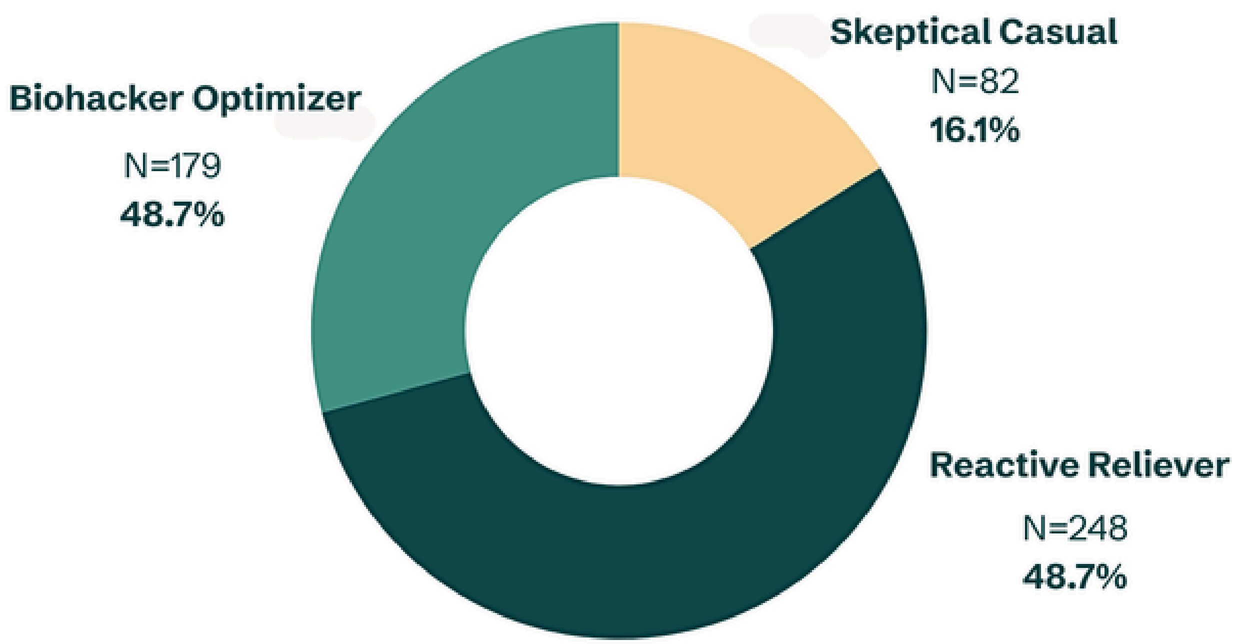
Reactive Relievers

Open-minded consumers who turn to functional foods **during specific times of need**

Skeptical Casuals

Consumers who casually enjoy functional foods but remain **wary of their promised benefits**

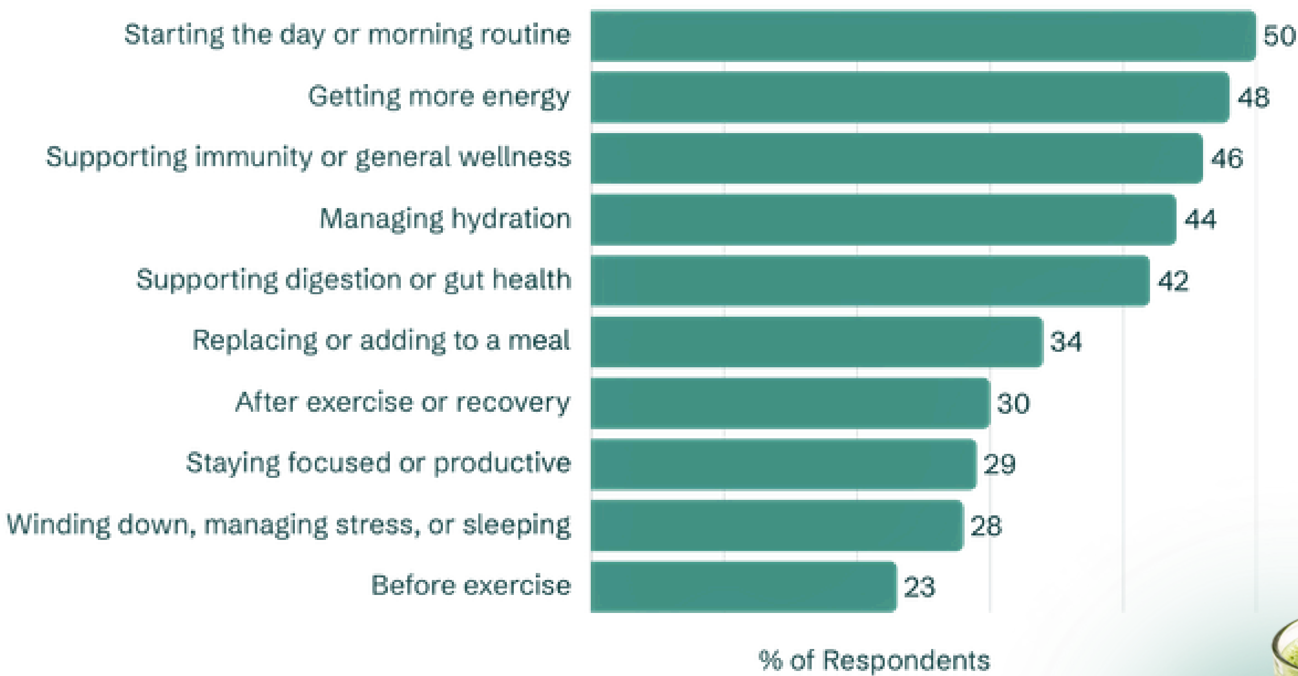
Psychographic Segment Sizing



Usage Intensity Differs by Mindset

Our research discovered that **consumers use functional foods most often in broad daily-life situations rather than niche performance moments.** The most common usage situations are as follows, including routine usage by product type:

Top Triggers for Functional Food Use



Routine Usage by Product Type

Product Type	Daily	Weekly+
Vitamins or minerals	72%	87%
Snacks/foods with added benefits	32%	77%
Electrolyte or hydration products	29%	73%
Protein powder, shakes, or bars	24%	65%
Functional beverages	27%	65%
Probiotics/prebiotics/digestive	29%	62%
Sleep, stress, or relaxation supplements	28%	54%
Greens powders or wellness brands	10%	34%

Biohacker Optimizers, unsurprisingly, significantly lead Reactive Relievers and Skeptical Casuals on weekly usage of all product types.

Seeing as the latter group are consistently lighter users, they likely need lower-friction entry points before adopting functional formats into their regular routines.

Most Popular Formats & Delivery Methods

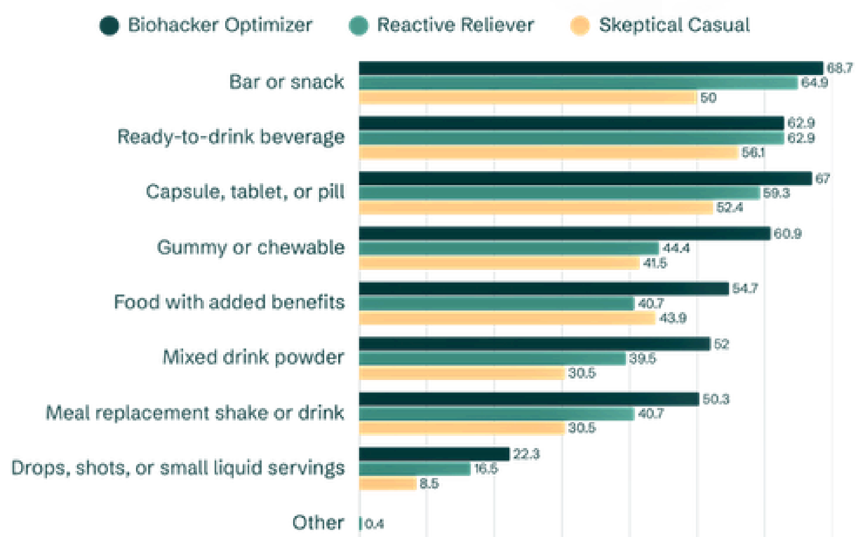
The most popular formats overall include bars and snacks, ready-to-drink beverages, and capsules/tablets/pills. Ready-to-drink beverages are the most aligned across Biohacker Optimizer, Reactive Reliever, and Skeptical Casual segments and are the favorite amongst the latter group.

Biohacker Optimizers are the most receptive to more-involved or specialized formats. They significantly over-index on powders mixed into water or another drink, chewables (including gummies), food with added benefits, and meal replacements.

Generation also plays a role. Bar and snack consumption is highest amongst Gen Z at 75%, while Boomers broadly prefer capsules, tablets, and pills at 75.4%. Gummies skew younger with Millennials at 63% and Gen Z at 59.1%, significantly above Gen X and Boomers.

Each functional occasion has a go-to format. When consumers need hydration, sleep support, or digestive health, they reach for a specific bio-delivery method, such as prebiotic capsules or functional beverages. Naturally, electrolyte drinks own the hydration space, but the most divided occasion with no clear winner is energy: consumers turn to functional beverages almost as often as they turn to snacks, protein powder, shakes, and bars.

Most Popular Formats & Delivery Methods



Format	Energy	Hydration	Immunity & Wellness	Digestion	Meal/Nutrition	Workout & Recovery	Sleep	Stress
Protein powder/shakes/bars	19%	3%	8%	5%	23%	20%	1%	2%
Electrolyte/hydration	10%	58%	4%	4%	2%	10%	0.4%	2%
Vitamins or minerals	15%	3%	54%	7%	8%	5%	2%	2%
Probiotics/digestive	6%	4%	10%	48%	2%	4%	2%	2%
Functional beverages	24%	12%	12%	15%	3%	7%	1%	3%
Greens powders/blends	6%	4%	14%	10%	2%	4%	1%	2%
Sleep/stress supplements	4%	2%	4%	2%	1%	3%	44%	7%
Snacks/foods added benefits	25%	4%	13%	14%	22%	10%	2%	4%

Product-Role Matrix: *Primary Need by Format (% of format users; n per format varies)*

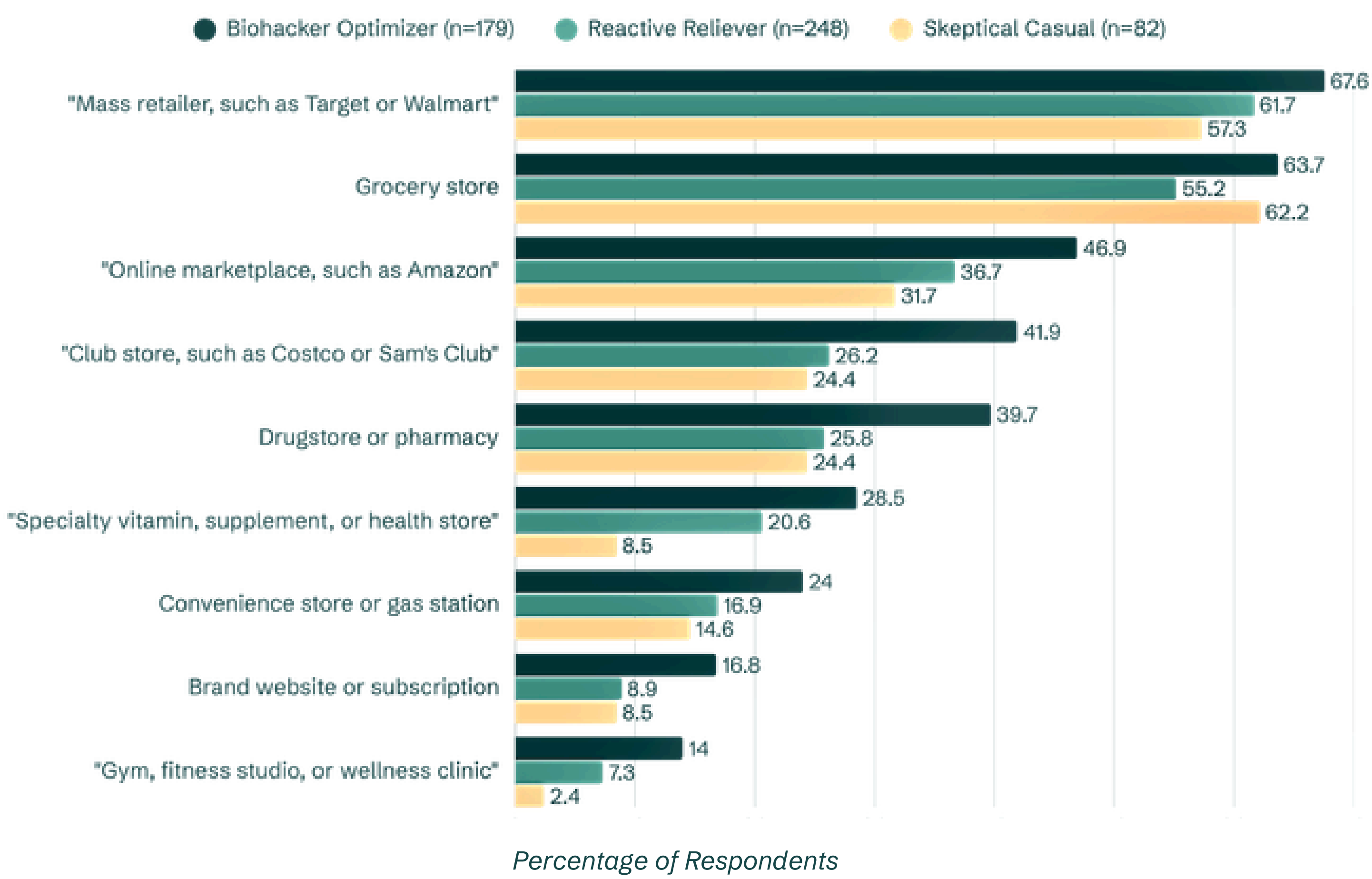
Retail Channels

Where do consumers most often buy their preferred functional foods? And, therefore, what are the channels that are best primed for discovery?

Mass retailers and traditional grocery stores are the clear winners. Shoppers tend to put functional foods in their typical baskets instead of visiting specialty stores or buying directly online. While gyms have a market for supplements, shakes, bars, powders, gummies, and other formats, the best place to reach Skeptical Casuals is in major aisles rather than drawing them elsewhere.

It's interesting to note that Biohacker Optimizers are far more likely to purchase functional foods from club stores and pharmacies. This pattern attests to their high level of intent: Biohacker Optimizers have a better idea of (or at least a stronger belief in) what they want to incorporate into their routines and seek it out wherever it's available.

Retail Channel Usage by Approach Segment



The Most Important and Most Underserved Jobs

When asked to rank jobs-to-be-done in order of importance, participants ranked broader wellness goals higher than specific in-the-moment jobs (such as exercise).

The most critical jobs are as follows:

Stay hydrated	**91%**
Feel like I'm taking care of myself, not just fixing a problem	**86%**
Stay focused/mentally sharp	**84%**
Support immunity	**84%**
Feel confident I'm doing something good for my body	**83%**
Get enough protein and nutrition on busy days	**83%**

This hierarchy reveals broad demand, but importance alone doesn't identify whitespace.

Instead, the hardest jobs to solve are:

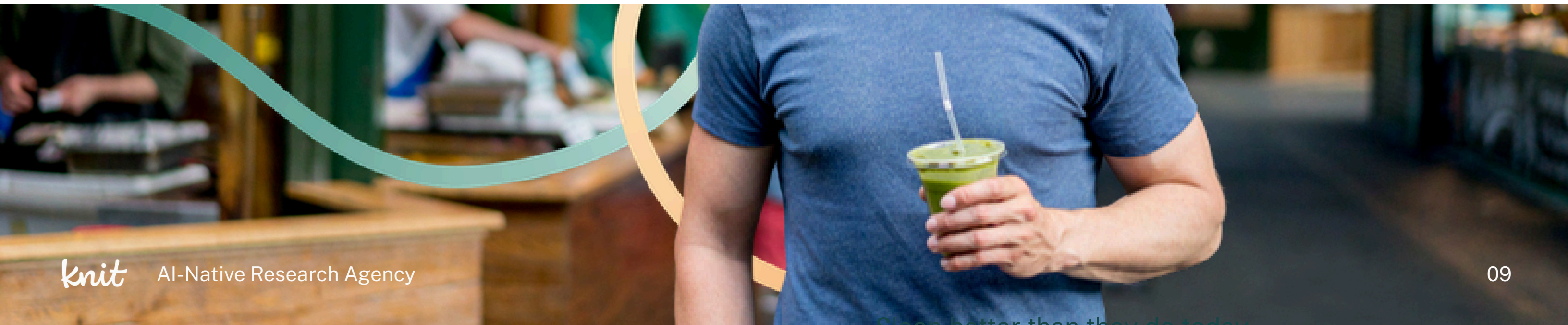
Sleep better	**33.5%**
Manage everyday stress	**32%**
Feel energized without jitters	**27.3%**
Stay focused/mentally sharp	**26.5%**

So, while hydration is highly important at 91%, only 14.5% of respondents indicate that it's hard to solve. Hydration is a large space, but comparatively less urgent in innovation territory.

We measured improvement priority to sharpen the whitespace story. Largely aligned with the above, consumers most want to:

Sleep better than they do today	**45%**
Manage everyday stress	**38%**
Feel energized without jitters	**30%**
Support digestion and reduce bloating	**30%**

This ranking reveals that the most urgent white space is concentrated in restoration, emotional regulation, and perceived digestive health rather than in hydration or immunity.



Gender and Generational Influences

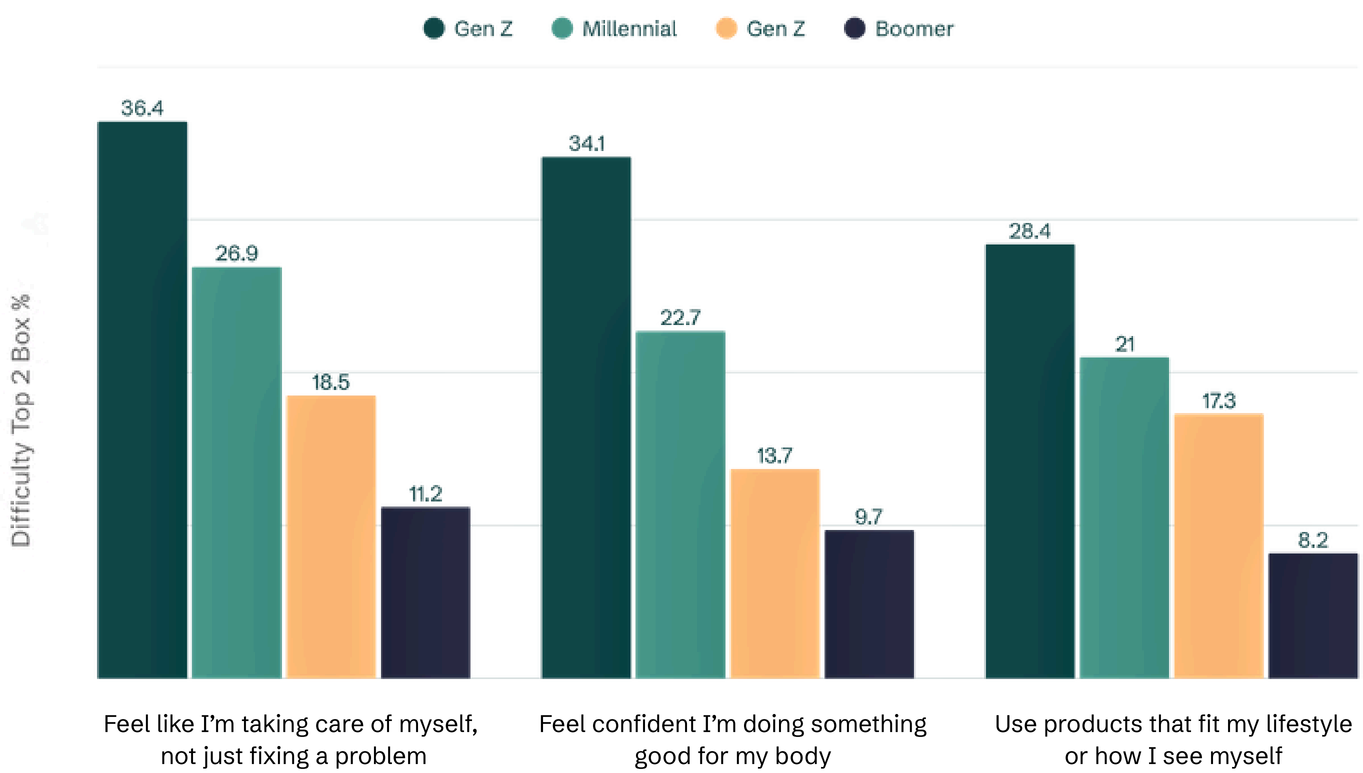
Interestingly, women are more likely than men to prioritize functional foods for managing everyday stress at 42.7% versus 34%. Gen Z and Millennials also report that many jobs-to-be-done are significantly harder to solve for than older cohorts, including energy without jitters, stress management, and focus. Gen Z is especially likely to say sleeping is a more difficult challenge at 42% than Gen X at 26.8%.

Analyzing the data further, most generations indicate that long-term, emotional, and “identity”-related jobs are highly important but relatively easy to solve for. 86% of participants noted that feeling like they’re taking care of themselves and not just fixing a problem, for instance, is very important, but only 22% said it’s challenging to address (“Feel confident I’m doing something good for my body” received similar responses at 83% and 18%, respectively).

36.4%

of Gen Z report difficulty fulfilling self-care needs

Gen Z, however, noted that long-term identity jobs are harder to fulfill. They reported a 36.4% difficulty in self-care and a 34.1% difficulty in feeling confident they’re doing something positive for their bodies.



The Most Common and Vulnerable Formats

The most common functional food formats are as follows:

Pills, capsules, gummies, and tablets	24.4%
Functional beverages	17.8%
Functional snacks	10.5%
Exercise, sleep, and habit change	9.5%
Powder or mix	9.2%
Regular food or diet change	9%

These numbers are averages across generations (which was more statistically viable in this case measuring by Biohacker Optimizers, Reactive Relievers, and Skeptical Casuals), but there are a few discrepancies worth noting. **Gen Z is far less likely to take an ingestible** (pill, capsule, gummy, or tablet) at 16.1% than boomers at 27.7% (which is comparable to Gen X and Millennials), and Boomers were the least likely to turn to functional beverages.

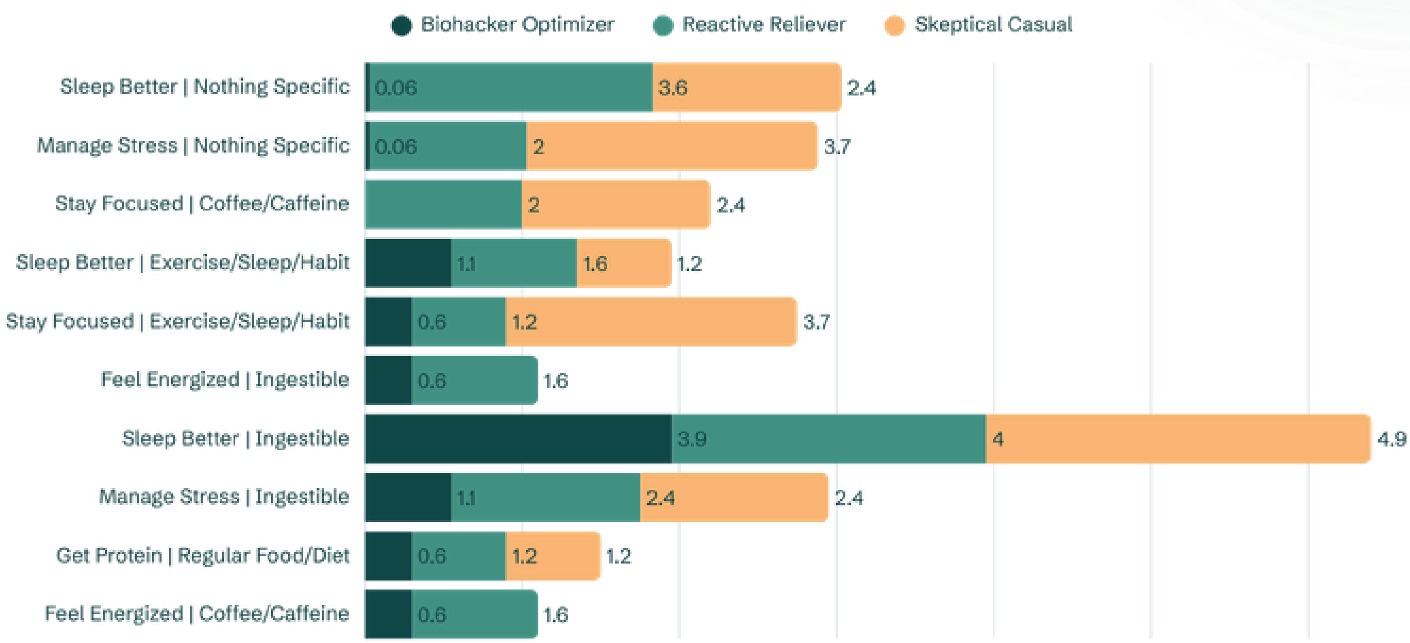
Interestingly, **Gen X is also not a fan of functional snacks** compared to other generations at 6.2% compared to 10.4%-15.7% of other generations.

In terms of gender influence, **women are more likely to consume ingestibles** at 28.3% versus 21% for men, and men are more likely to use powders or mixes (11.1% versus 7.3%).

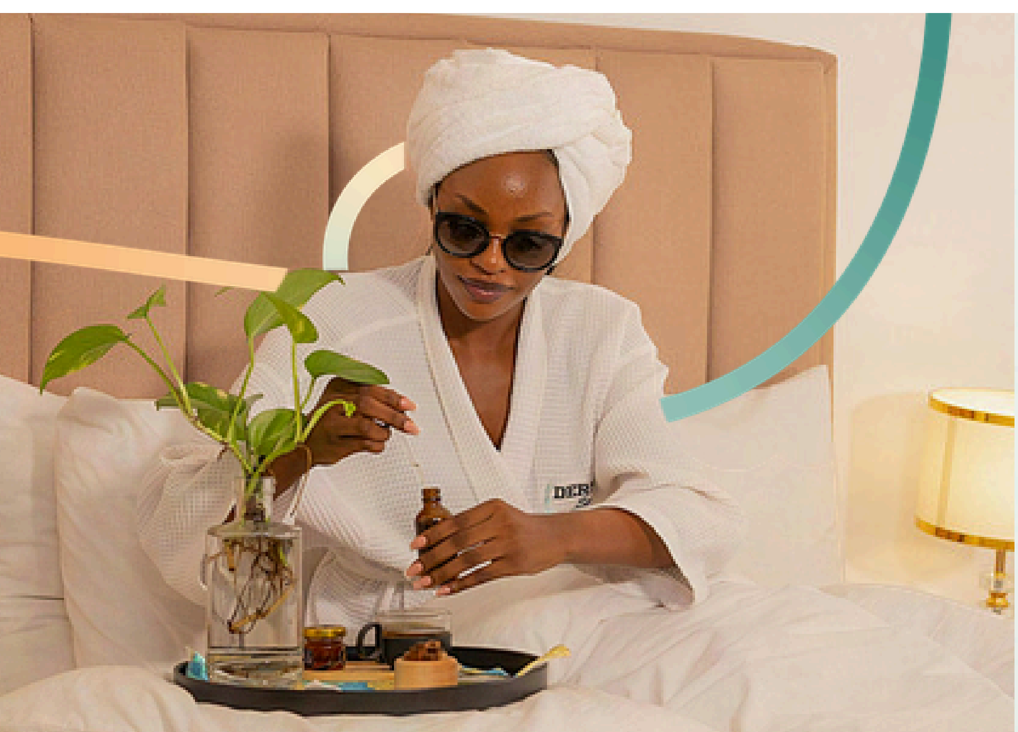
Vulnerable Solution Pairings

We also tracked how consumers feel about particular solution pairings — i.e., jobs-to-be-done and typical solutions. The most vulnerable pairing we found is sleeping better with no specific solution, where 41.4% of respondents are dissatisfied, and only 13.8 % are satisfied with not having a go-to functional food solution for sleep.

The next-highest vulnerability is managing everyday stress with no specific solution, with a dissatisfaction rate of 39.1%.



Dissatisfied (%)



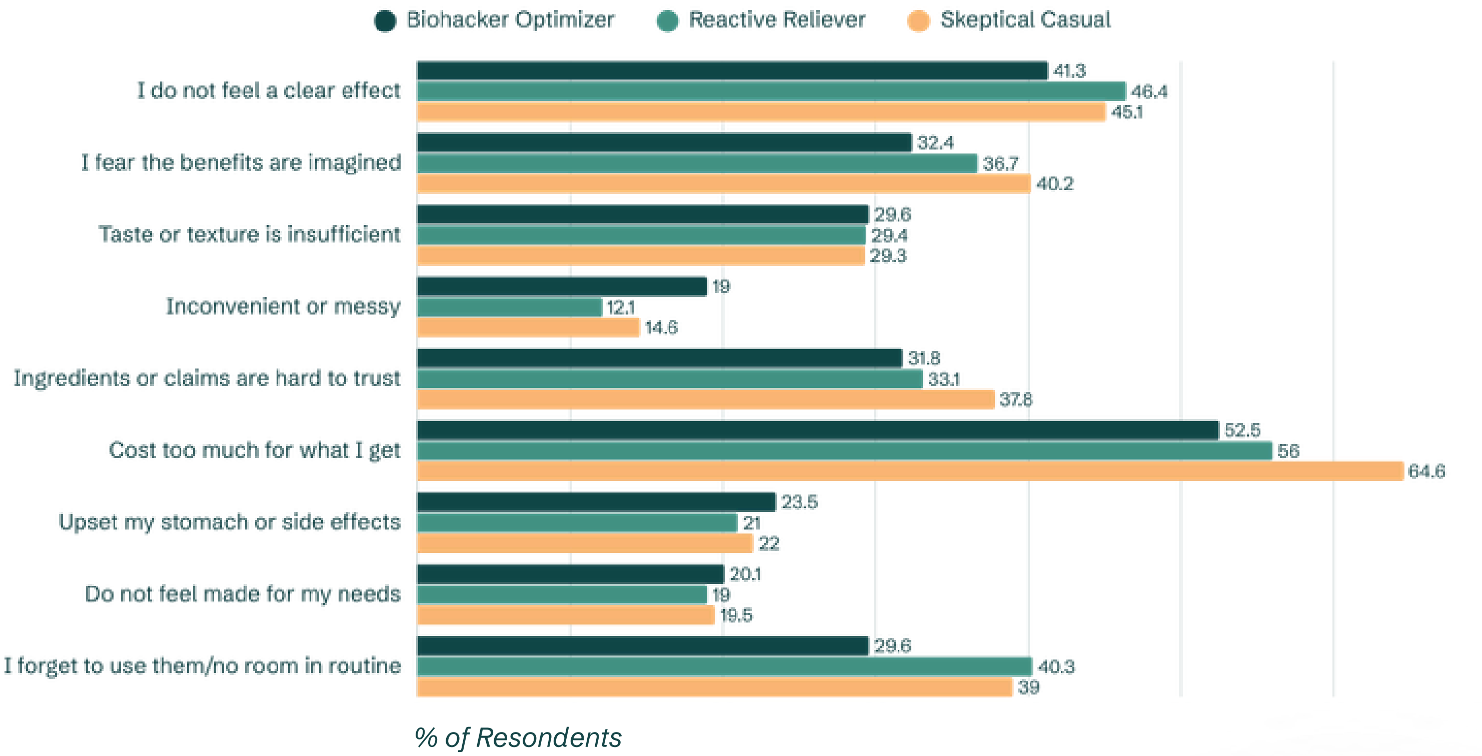
These solution vulnerabilities confirm that sleep and stress are not merely high-interest territories; they are areas where current approaches leave measurable dissatisfaction. Coffee, caffeine, and energy drinks also show vulnerability for focus, with 28% dissatisfied amongst those using them for that purpose. This finding indicates an opportunity for focus concepts taht can deliver a more credible, less compromised alternative to caffeine workarounds.

Failure Points

We know what you're asking next: what exactly about all of these products makes consumers dissatisfied? We asked our participants about the precise failure points that drive them away.

The functional food category's top failure point turns out to be price-value, with 286 out of 509 respondents noting that various products cost too much for what they get. The next major failures are:

Not feeling a clear effect	226	Forgetting to use them or not finding open space in their routines	185
Fear the benefits are imagined	182	Ingredients or claims are hard to trust	170



We used this opportunity to track consumer's fear of the placebo effect, which turned out to be a failure point consumers are genuinely wary of. Amongst all the products they take, Biohacker Optimizers included, participants were largely suspicious that functional foods brands aren't delivering on the benefits they promised.

It's in the name, so it makes sense that Reactive Relievers are more likely than Biohacker Optimizers to struggle with routine-fit problems. However, it's interesting to note that they struggle even more than Skeptical Casuals: one group believes in functional foods but isn't as proactive about taking them, while the other remembers but is suspicious of the products themselves.

Product Abandonment

In terms of product abandonment — reasons consumers decided to stop using specific functional foods after trying them for a while — lack of proof or a tangible effect, dissatisfaction with the product, and outright claiming a lack of efficacy were the top themes, in that order.

Biohacker Optimizers, Reactive Relievers, and Skeptical Casuals, however, were largely aligned across all three reasons.

1. **Lack of proof or a tangible effect**
2. **Dissatisfaction with the product**
3. **Lack of efficacy**

One particular Skeptical Casual described quitting collagen because "Taking collagen didn't work after three months, [so] I gave up," while a Reactive Reliever noted a product "messed up my stomach really bad." These verbatims demonstrate that consumers abandon solutions when they don't feel the benefits and when the product experience doesn't warrant repetition.

"Taking collagen *didn't work* after three months, [so] I gave up,"

SKEPTICAL CASUAL

A specific product "messed up my stomach *really* bad."

REACTIVE RELIEVER

Attribute Gaps

The most significant gaps between job importance and delivery are as follows:

Category	Importance (T2B)	Delivery (T2B)	Gap
Fair price for the value	**90%**	**45%**	**-45 pts**
Noticeable benefit I can feel	**87%**	**50%**	**-37 pts**
Gentle on my stomach or body	**86%**	**61%**	**-25 pts**
Clear ingredient information	81%	60%	-21 pts
Personalized to my specific goals	72%	53%	-19 pts
Benefits backed by science or expert support	77%	59%	-18 pts
Good taste or texture	77%	61%	-16 pts
Fits my diet or food preferences	76%	62%	-14 pts
Easy to fit into my daily routine	83%	72%	-11 pts
Easy to combine with foods/drinks I already use	73%	63%	-10 pts
Low or no added sugar	64%	61%	-3 pts
Portable or easy to take with me	70%	69%	-1 pt

These gaps indicate that consumers are not just asking for more functional benefits; they want those benefits to be credible, tolerable, transparent, and worth the price. For example, if you're a brand considering manufacturing stress management supplements, the key isn't to add claims of focus or relaxation into the mix — it's to make sure consumers feel your promises happening in their bodies beyond a shadow of a doubt.

Notably, Biohacker Optimizers are both more demanding and more positive about current market delivery. This consumer segment stresses the importance of concrete and scientifically-backed benefits even more than Skeptical Casuals (which are necessary for winning the latter over, but Biohacker Optimizers are clearly more passionate), but they're also more likely to believe existing solutions already deliver on those key attributes.

Competitive Openness

So, which are the areas most open for competition?

Competitive openness is highest for:

Stress or mood support	**73.3%**
Workout or recovery	**72.7%**
Focus or productivity	**71.7%**
Sleep or relaxation	**68.8%**
Digestion or gut health	**66.6%**

Hydration is the least open need state at 43.8%, reinforcing that it's already a well-served job-to-be-done.

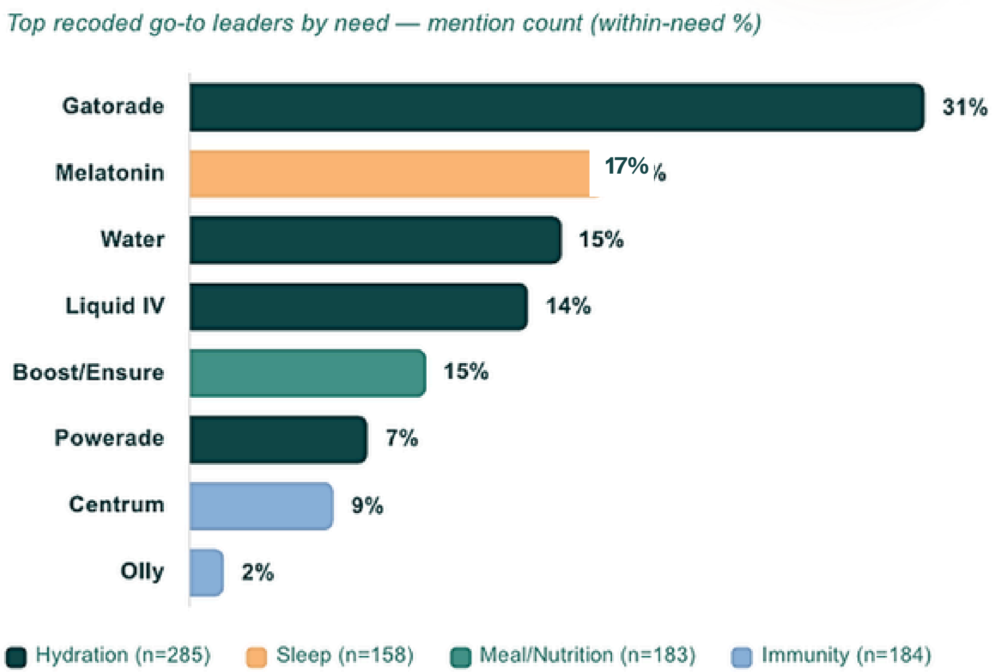
Skeptical Casuals demonstrate the most competitive openness, lacking clear go-to solutions across most need states. If you want to target this audience, they're the ones who would benefit most from simplification and clarification, especially in crowded need states like stress, focus, and sleep.

The Top Brands

We know this question has been weighing on your mind: what are the top go-to brand or ingredient leaders by need? By mention count, they are:

Hydration, clearly, is a very saturated space. New entrants here would face enormous barriers.

No supplement brand or ingredient, however, owns stress or focus, and melatonin can be found across countless manufacturers. As we've established, sleep is an underserved job-to-be-done, so it appears there is no one melatonin product consumers are satisfied with. You'll also have to tackle a great deal of skepticism if you hope to play in the stress and focus categories.



WHAT THESE FINDINGS MEAN:

Strategic Implications

The greatest whitespace is in *'felt restoration'* & *'credible mental performance.'*

Sleep, stress, and focus rise to the top because they combine high-priority, high-difficulty, dissatisfaction with current solutions, and competitive openness.

Sleep better is the clearest lead platform because it ranks first in our whitespace matrix, while stress and focus form a related mental-wellbeing and performance platform because both have high openness and meaningful dissatisfaction or difficulty.

We advise not treating hydration and immunity as primary whitespace targets because, despite their high importance, hydration exhibits a lower difficulty of 14.5%, low dissatisfaction at 2.1%, and a lower openness at 43.8%. Likewise, immunity has a low dissatisfaction rate of 3.9% and a lower difficulty of 17.5%.

These stats indicate hydration and immunity are less urgent for brands that don't already have viable solutions compared to sleep, stress, and focus.

WHAT THESE FINDINGS MEAN:

Strategic Implications

Solve the *proof-of-value* problem before worrying about flavor and format

If you're a functional food brand wondering whether you should make a snack, gummy, capsule, pill, beverage, or other format, that's not your main problem: the dominant failure points in this category are economic and efficacy-related, not necessarily about novelty or sensory experience.

Price-value and felt benefit are the two largest design gaps (with 45-point and 38-point gaps, respectively). Don't get us wrong; taste, texture, and routine fit still matter, but they should support a stronger proof-of-value proposition rather than substitute for it.

The implication for concept development is that vague "wellness support" language is unlikely to sway consumers across the board, from Biohacker Optimizers to Skeptical Casuals. Besides products actually delivering on promises, messaging needs to make the target benefit understandable, believable, and repeat-worthy while justifying price and reducing the risk of side effects.

WHAT THESE FINDINGS MEAN:

Strategic Implications

Vary the *how*, not just the what

The top territories are broadly relevant, but the winning expression should vary by approach segment.

For example, Biohacker Optimizers demand advanced, proof-forward, premium-feeling concepts because they are more experimental, more self-tracking, and more demanding on science, personalization, and routine integration.

Reactive Relievers require practical, occasion-based problem-solving because they over-index on routine-fit failure and busy-day nutrition priority.

Skeptical Casuals require simpler, lower-risk propositions because their strongest signal is lack of clear category leadership rather than significantly higher attribute demands.

This strategic nuance means the same sleep territory could have three viable expressions: a precision sleep optimization product for Biohacker Optimizers, a simple nightly relief product for Reactive Relievers, and a low-risk, transparent, plainly-worded sleep entry point for Skeptical Casuals. The same logic applies to stress and focus because each territory has wide relevance but different credibility and usage barriers by segment.

What comes *next?*

From Whitespace
Concept Testing

Don’t worry, we don’t want to leave you hanging — we already screened several concepts based on these findings consumers are most interested in.

Check the **Reports page** under Resources on our website for the subsequent report, coming in early fall 2026.

Research Report Contributors:

This report is based on original research run through the Knit platform. Here are the contributors who helped give it a bit of polish to make it more enjoyable and useful as you peruse.

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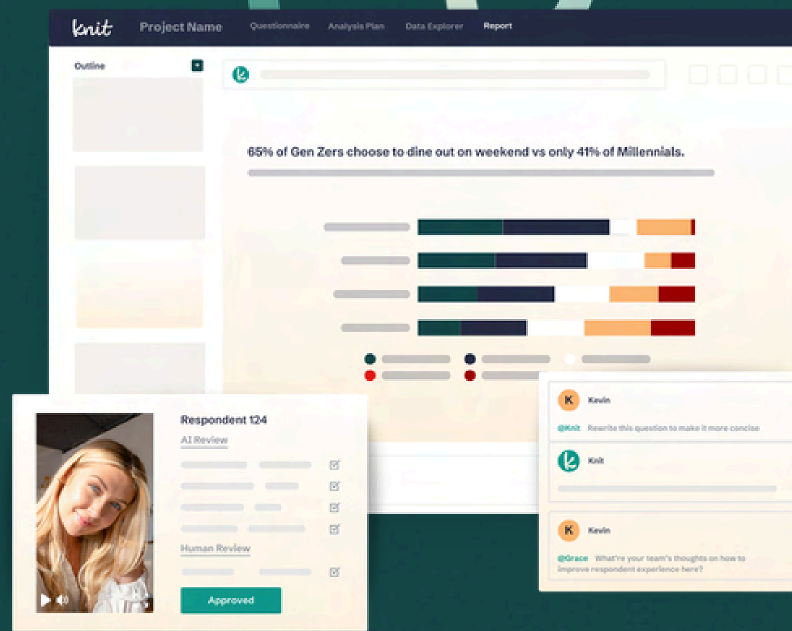

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