



HAINES

HOW TO WIN IN FUNCTIONAL NUTRITION BRAND GROWTH PLAYBOOK

2026



FUNCTIONAL NUTRITION IS ACCELERATING FAST

11%

Expected CAGR 2025-2032

\$364 **BN**

Global functional Food & Beverage market, 2024

56%

Consumers globally purchase functional nutrition 'often'





AS HEALTH LITERACY RISES, FUNCTIONAL CATEGORIES ARE **EVOLVING FROM EVERY ANGLE**



INGREDIENTS

More products are incorporating plant proteins, nootropics and adaptogens.



PRODUCT CLAIMS

Claims are diversifying around mental support, clean energy and high fibre, often stacked in the same product.



LABELLING

Amidst overwhelming claims, clear labeling and transparency grow in demand.



PACKAGING

Packaging innovations driven by sustainability, portability, and innovations in format (e.g. clear protein RTDs).



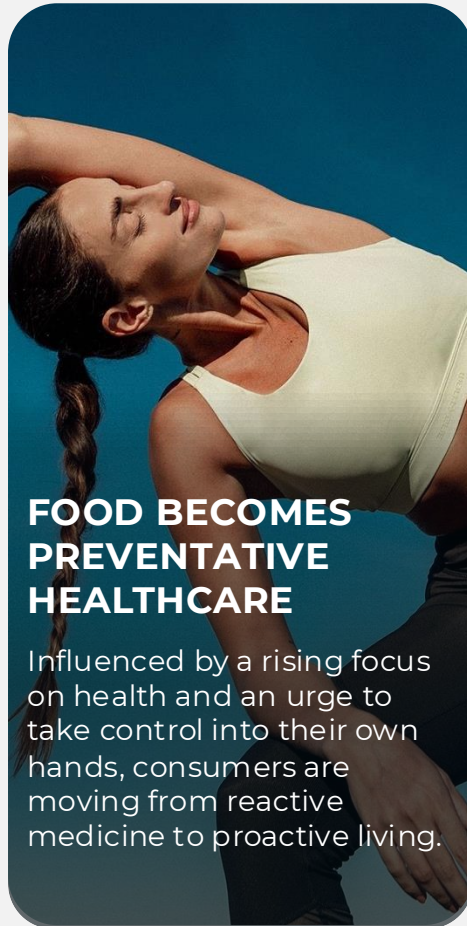
CULTURAL SHIFTS HAVE FUELLED THIS **SURGE TO FUNCTION**



COST OF LIVING FORCES PROOF

With lower spending power, consumers look for products that promise credible and immediate benefits. This manifests in clearer, multi-purpose claims – providing more from each purchase.

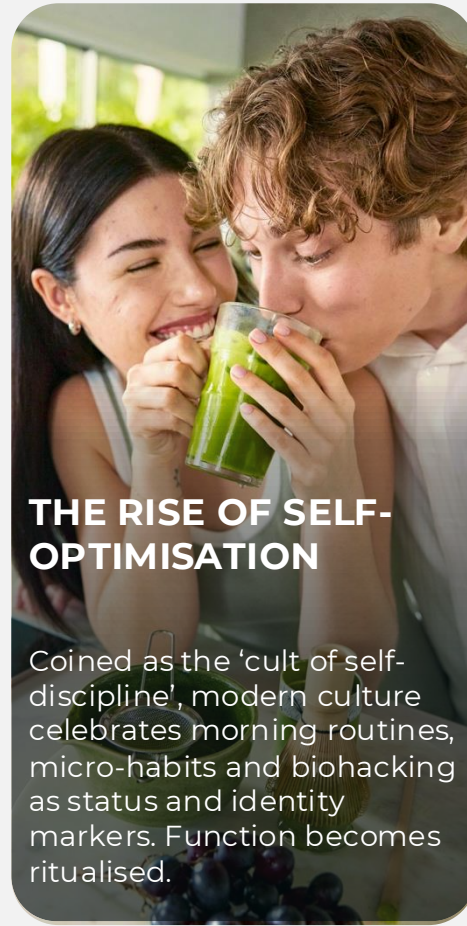
50% of UK consumers cut non-essential spending in early 2024
KPMG, 2024



FOOD BECOMES PREVENTATIVE HEALTHCARE

Influenced by a rising focus on health and an urge to take control into their own hands, consumers are moving from reactive medicine to proactive living.

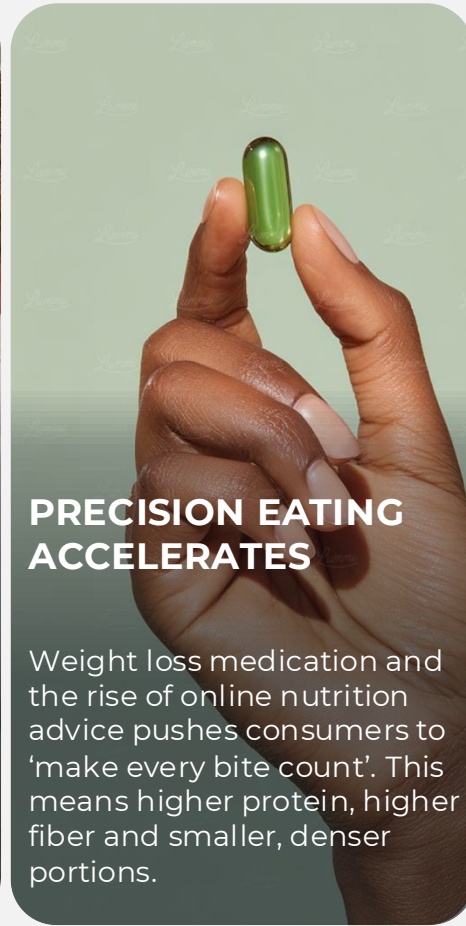
Health is now one of the top 3 purchase drivers in F&B
McKinsey, 2025



THE RISE OF SELF-OPTIMISATION

Coined as the 'cult of self-discipline', modern culture celebrates morning routines, micro-habits and biohacking as status and identity markers. Function becomes ritualised.

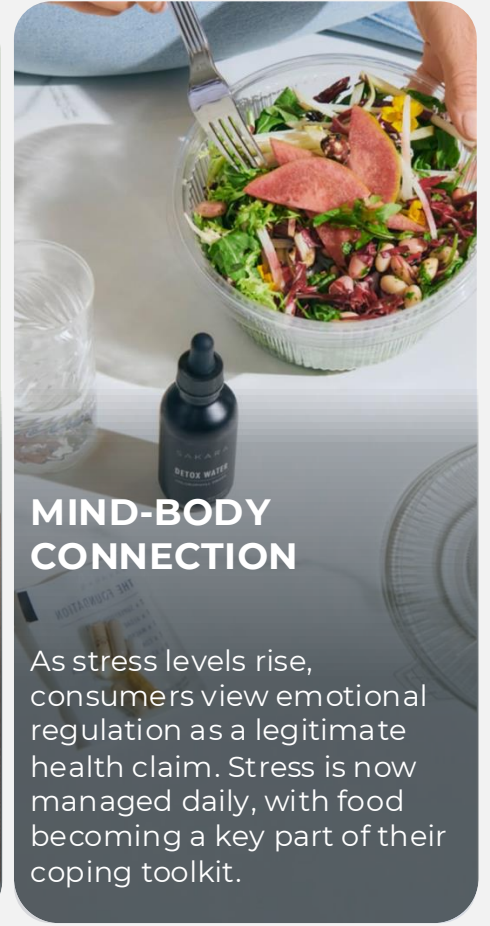
To Millennials and Gen Zers, wellness has become a daily, personalized practice. McKinsey, 2025



PRECISION EATING ACCELERATES

Weight loss medication and the rise of online nutrition advice pushes consumers to 'make every bite count'. This means higher protein, higher fiber and smaller, denser portions.

An estimated 1.6m adults in England used weight loss drugs in the last year
UCL, 2026



MIND-BODY CONNECTION

As stress levels rise, consumers view emotional regulation as a legitimate health claim. Stress is now managed daily, with food becoming a key part of their coping toolkit.

In the UK, 74% of adults felt overwhelmed or unable to cope at some point in the last year
Stress Management Society, 2024



BRANDS ARE RIGHT TO BE EXCITED, BUT THE CATEGORY IS APPROACHING SATURATION

MEGA NPD GROWTH

42% +

NEW F&B PRODUCT LAUNCHES CARRY FUNCTIONAL CLAIMS*

Functional F&B is a bombardment of claims, new formats and NPD - and consumers need clarity amid the chaos.

Driven by marketing teams chasing wellness trends and with little consideration for real consumer needs, it's getting overwhelming and busy.

'**Function fatigue**' poses a real risk as brands scramble to capitalise.

A GROWING ECOSYSTEM OF NEW FORMATS, PRODUCTS & BRANDS



*In US product launches 2023-2024, DataM Intelligence 4 Market Research



AND AN EXPLOSION OF CLAIMS AND INNOVATION **IS LEAVING CONSUMERS OVERWHELMED AND SCEPTICAL**

As faith in health systems dwindle, wellness sits increasingly in the hands of the consumer. Armed with an abundance of information, consumers are looking to food as a preventative measure, but they're feeling the pressure.

Not knowing where to start, consumers face decision paralysis and an inability to trust what products will do good, taste good and be worth the money.

90%

CONSUMERS WANT TO EAT MORE HEALTHILY BUT ARE WORRIED ABOUT THE COST

60%

ARE OVERWHELMED BY NUTRITIONAL OPTIONS AND WHAT THEY SHOULD PRIORITISE

72%

WANT TO TRY NEW FUNCTIONAL PRODUCTS BUT ARE PUT OFF BY POOR TASTE AND CONSUMPTION EXPERIENCE





THE CHALLENGE: HOW DO BRANDS BREAK THROUGH THE NOISE TO SOLVE FOR COMPLEX CONSUMER TENSIONS?

Consumers no longer accept trade-offs;
they expect brands to resolve
competing needs in one experience.

DISCIPLINE



VS



DELIGHT

EASE



VS



EFFORT

CLARITY



VS



CREDIBILITY

TRUST



VS



SKEPTICISM

TASTE



VS



FUNCTION



THE OPPORTUNITY LIES IN SOLVING FOR A RANGE OF CONSUMER NEEDS

1. EXPERIENCE



Consumers are frustrated by poor taste, texture and overall experience of functional foods and drinks.

THE UNLOCK
BETTER TASTE, TEXTURE,
EXPERIENCE

2. CONVENIENCE



Consumers need some guidance on how to best, and most conveniently, integrate functional nutrition into daily routines.

THE UNLOCK
FRICTIONLESS ROUTINE
INTEGRATION

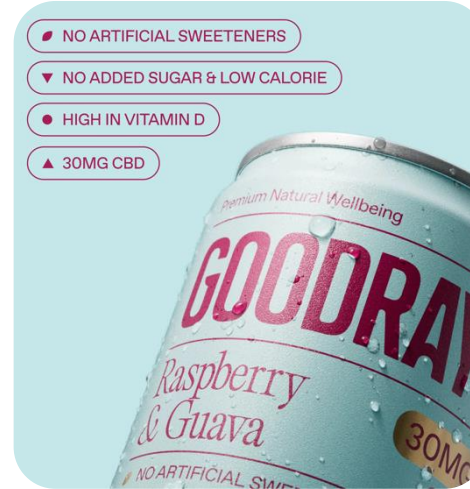
3. VALUE



Consumers need to view enriched options as good value for the benefits that they deliver.

THE UNLOCK
REAL BENEFITS WORTH
THE EXPENSE.

4. SIMPLICITY



Consumers want to live healthier lives but find managing multiple priorities overwhelming.

THE UNLOCK
CLEAR BENEFITS,
NO JARGON.

5. CONFIDENCE



Consumers are put off by cluttered, misleading and vague claims, hype, and misinformation.

THE UNLOCK
CREDIBLE CLAIMS FROM
TRUSTED VOICES.



BECAUSE CONSUMER NEEDS ARE NOW **BLURRED** **NOT BINARY**

THE OLD MODEL IS BREAKING.

CPG was built on trade-offs which forced consumers to choose:

- Healthy or indulgent
- Convenient or premium
- Performance or enjoyment

But today's consumer is disciplined and impulsive, health-conscious whilst pleasure-seeking.

CONSUMERS NOW EXPECT ONE PRODUCT TO DELIVER ON MULTIPLE NEEDS.



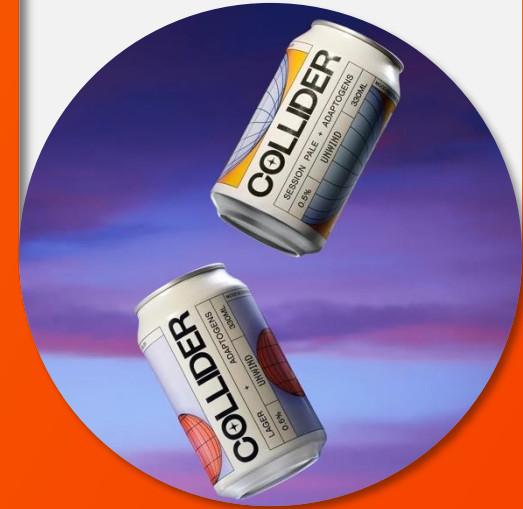
**BREAKFAST WHICH
PROVIDES NUTRITION,
CONVENIENCE & TASTE**



**AFTERNOON TREAT
FOR ENERGY,
INDULGENCE &
STRESS-RELIEF**



**EVENING DRINK TO
RELAX & SOCIALISE
WITHOUT IMPACTING
NEXT-DAY WELLNESS**





WINNERS MOVE BEYOND PRODUCT, **BUILDING PLATFORMS THAT UNLOCK CONSUMER VALUE**

Chasing individual product needs will only perpetuate a race to the next functional trend. Successful brands are built on deep understanding of shifting healthy lifestyles.

TRIP

NOT JUST CBD DRINKS, TRIP IS A DELICIOUS, SOCIAL-FRIENDLY WAY TO SUPPORT MENTAL FUNCTION



CONVENIENCE | SIMPLICITY | EXPERIENCE

Free* SOUL

NOT JUST SUPPLEMENTS, FREE SOUL MAKES WOMEN'S NUTRITION SIMPLE, TRUSTWORTHY AND CREDIBLE



SIMPLICITY | CONFIDENCE | VALUE

pop i

NOT JUST A HEALTHIER SODA, POPPI IS THE FRONTLINE TO NEW INDULGENCES CATERED TO MODERN LIFESTYLES



EXPERIENCE | SIMPLICITY | CONVENIENCE



THE REAL QUESTION ISN'T WHAT YOU ADD NEXT. IT'S WHAT YOU'RE BUILDING.

MOST BRANDS IN FUNCTIONAL NUTRITION ARE STILL ASKING:



01

WHAT INGREDIENT DO WE ADD NEXT?



02

WHICH CLAIMS CAN WE LAYER ON?



03

WHAT TREND DO WE TAP INTO?

BUT THAT'S EXACTLY WHAT IS CREATING THE NOISE.



THE BRANDS THAT ARE WINNING ARE DOING SOMETHING **FUNDAMENTALLY DIFFERENT**

They're not launching products, they're building platforms that solve multiple needs at once.

They're becoming part of daily routines, not occasional purchases.

AND THAT SHIFT IS WHERE GROWTH IS NOW COMING FROM.





SO, THE QUESTION FOR YOUR BRAND IS SIMPLE:

ARE YOU ADDING TO THE NOISE?

**...OR ARE YOU BUILDING SOMETHING
CONSUMERS CAN ACTUALLY LIVE
WITH EVERY DAY?**

A PRACTICAL NEXT STEP

If this resonates, the most useful thing we can do isn't present more slides.

It's to apply this thinking directly to your business.



**1 HOUR
SESSION**



ONLINE



**FREE OF
CHARGE**

We'll run a short, focused session to:

- Diagnose where your current portfolio is creating friction vs. solving needs.
- Identify the 2-3 tensions that matter most for your category.
- Map where a functional platform, not just product, could unlock growth.
- Pressure test whether your current innovation pipeline is adding value or creating noise.

If you'd like to book in a session with our team, please get in touch:

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THANK YOU.

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