

FREE PREVIEW • FALL 2026 • UNITED STATES

Functional drinks: what's moving

A drink's job is changing. The fastest growth is in drinks hired for maintenance: recovery, steady energy, fiber. Measured across what people post, search and buy.

62

drink formats measured,
read 30 Oct 2026

15

functional needs,
ranked by growth

3

streams: social,
search and sales

THE NEEDS

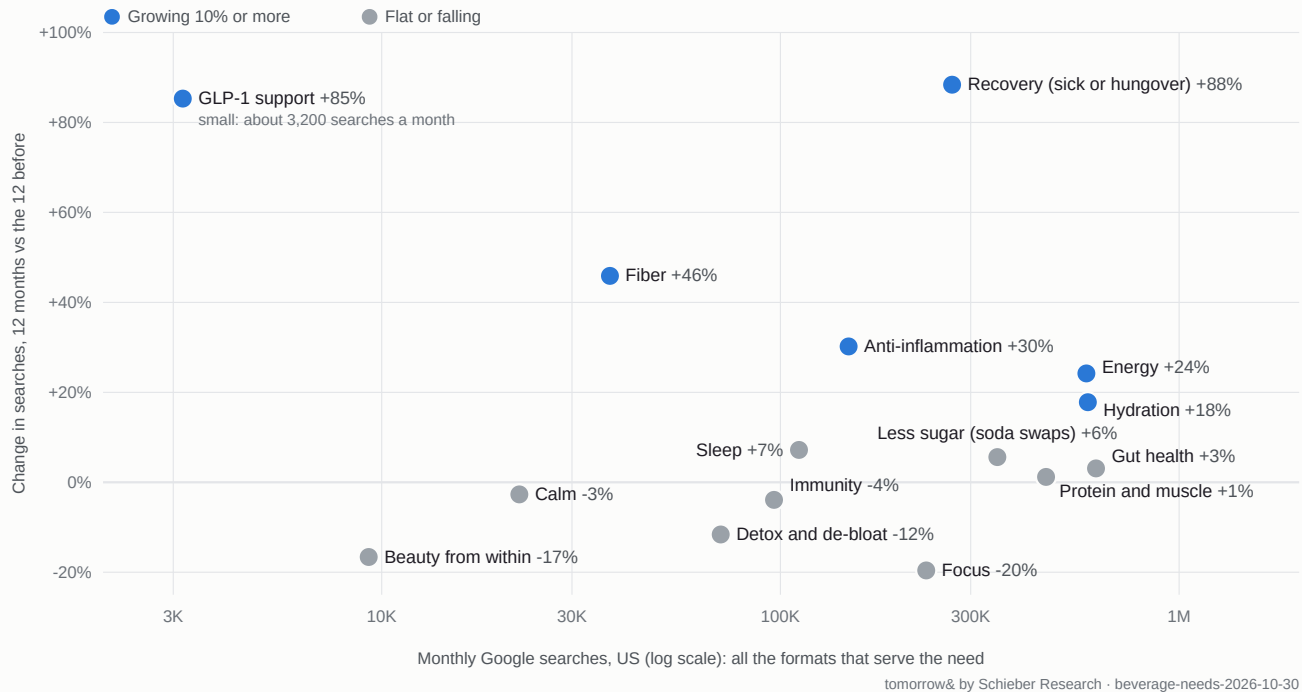
What people want a drink to do

Recovery when sick or hungover is up at least 88% in Google searches, fiber 46%, anti-inflammation 30% and energy 24%. Focus drinks fall 20%. People hire a drink for maintenance: to recover, to keep going, to keep things moving.

Recovery, fiber, GLP-1 support and anti-inflammation lead functional drinks

Google searches, US, Oct 2025–Sep 2026 vs Oct 2024–Sep 2025. Directional.

Each need measured through the drink formats that serve it. Blue: growing 10% or more. Read 30 Oct 2026.



Google searches, US: average a month Oct 2025–Sep 2026, change vs Oct 2024–Sep 2025. Each need is measured through the drink formats that serve it.

What it might mean. Some of the fastest-growing drink searches concern maintenance: recovery, energy and digestion. A format can ease while a related need grows elsewhere.

Worth checking. Which job your drink serves, whether the signal appears beyond search, and whether the opportunity fits your audience and sales.

FOUR SHIFTS

A drink's job is changing

The full report takes each shift through why, who, what it might mean and what's worth checking.

STRONG

Rising in all three places we measure: what people post, what they search for, and what they buy.

BUILDING

Rising in two of the three. Real momentum, with one place still to catch up.

EARLY

Rising in one of the three so far. Worth watching and testing; not yet confirmed.

Numbers below: Google searches, US: average a month Oct 2025–Sep 2026, change vs Oct 2024–Sep 2025, unless marked. Pinterest Trends and TikTok read 30 Oct 2026. Amazon US read 30 Oct 2026.

Energy without the crash

EARLY

Energy drink searches are up 18% on Google. Paraxanthine, sold as caffeine without the jitters or the crash, is up 153%, while caffeine pills fall 13%.

What people want: Steady energy that doesn't cost sleep, nerves or sugar.

Drinks as maintenance: recover and replenish

BUILDING

Searches for electrolytes when sick or hungover are up at least 88% (about 269K a month). Coconut water is up 30% on Google and 60% on Pinterest, while electrolyte drinks grow 8%.

What people want: To get back to normal: after a bug, a big night, a hot day, a workout, a long shift.

Gut health gets practical: fiber and less bloating

EARLY

Fiber drink searches are up 46% (prebiotic fiber +79%). Outside drinks, high-fiber snacks are up 59% and fiber gummies 35%. Kefir rose in 2025 and now holds (Google Trends: flat over the last 52 weeks, +4%); kombucha is flat too.

What people want: Regular digestion, less bloating, feeling full for longer.

Soda keeps its place and changes its job

BUILDING

Soda searches are flat (–1%). Dirty soda is up 152% on Google and 80% on Pinterest; zero sugar soda is up 26% and sells ahead of the category on Amazon. Searches to quit soda: 663 a month, –29%.

What people want: To keep the soda moment with less sugar, or turn it into a treat.

Functional Drinks Snapshot

Everything in this preview, taken to the level you can plan with.

- 01 **Fifteen functional needs, ranked.** Size and change for each need, through the formats that serve it.
- 02 **Four shifts in depth.** What people want, why, who, where it leads, what else could explain it, what would change our view; the searches behind each, and the videos, products and comments where you can see it.
- 03 **Needs leave the drink aisle.** Where the same needs grow as pouches, gummies, snacks, frozen treats and supplements.
- 04 **Who it connects to.** The fastest-rising pairings of a drink with a life stage or audience: pregnancy, older adults, women, GLP-1.
- 05 **Competitors and sales.** For 11 product groups: how crowded, how many new sellers, whether sales beat the category, and the brands to know.
- 06 Shrinking and settling. Formats that are easing, with related openings to test.
- 07 **Openings worth testing.** What to offer and how to show up, shift by shift.

\$1,250

Functional Drinks Snapshot | PDF | US data, Fall 2026

Request report

Working on a different category, or a question of your own? We map any category the same way, around your question. [Talk to us about a Category Map.](#)

METHOD

How we know

HOW WE READ THE MARKET

We built the vocabulary from discovery across TikTok, Reddit, YouTube, Pinterest, Google searched-together results and Google Trends, then organized 62 drink formats into 15 functional needs. We compared search, social and sales signals and examined 98 drink-and-audience pair searches with volume. The evidence cutoff for this edition is October 30, 2026.

SEARCH

Google US figures are average monthly searches in October 2025-September 2026, compared with October 2024-September 2025. Close variants count once; one-off spikes are smoothed. For one-month step changes, we read growth after the step (at least) or mark change unreadable. Needs include the formats that serve them; size and growth can cover different subsets where change is unreadable.

SALES

Amazon US assessments compare selling pace against each product's 90-day average and then against all products in the study. This is the sales measure used in strength labels. Year-over-year history is context only. TikTok Shop figures are cumulative units sold as of the read date, not a growth rate.

SOCIAL AND STRENGTH LABELS

Social direction uses dated posting-rate comparisons, format-level Reddit communities, YouTube interest and Pinterest Trends. Social counts as rising if at least two measures rise, or one rises and none falls. A single brand's community is context. TikTok examples without a dated comparison show presence, not momentum. Strong means three rising streams; Building two; Early one. An unconfirmed stream is not evidence of decline.

INTERPRETATION AND COVERAGE

Separate trends identify possible openings; they do not demonstrate switching, causation, clinical benefit or commercial success. Instagram is not covered. Generations were too rare in search, captions and comments to assess. Amazon and TikTok Shop are the sales coverage; results do not represent the entire US retail market.

RESEARCH DISCLAIMER

This report provides market research and strategic interpretation based on information available at the date of publication. Product directions are opportunities to evaluate, not guarantees of demand or commercial success. Business decisions require further validation appropriate to the product and market.

HEALTH DISCLAIMER

References to ingredients, products and consumer experiences do not constitute medical advice or establish safety or efficacy. Formulations and health claims require independent scientific and regulatory assessment.

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