



Euromonitor
International

Functional Food and Drinks: Winning Claims and Formats

November 2025

EXECUTIVE SUMMARY

Why read this report?

Key findings

INTRODUCTION

The functionalisation of diets in numbers

Beyond claim overload: The shift to simplified, all-in-one nutrition

Functionalisation of diets expands its meaning; healthspan a key long-term aspiration

Digestive support, energy and brain health set the pace in functional food and drinks

In low-volume era, functional health propositions provide new and needed added value

Holistic health in action: The interplay of digestion, energy and mind

DIGESTIVE HEALTH: BRIDGING TASTE AND METABOLIC PURPOSE

Digestive health moves to the centre of holistic nutrition, spearheaded by “biotics”

Tightening regulation will not impede growth for gut health positioning

Tangible risks of gut health “fatigue” and trust issues call for claim credibility

Navigating gut health in Europe – Arla Cultura’s strategic launch

Digestive health to fuse with indulgence through new dairy and snacks propositions

Single-serve and portable formats led the way for digestive health

In the US, Danone takes digestive health to weight and muscle management realms

Nomadic reimagines gut-friendly food: From spoonable yogurt to portable chilled bars

Asia Pacific drives global gut health growth, led by China and Indonesia

ENERGY ON DEMAND: PRECISION FORMATS FOR EVERY OCCASION

Energy’s next chapter: Cleaner, broader and purpose-driven

From pick-me-up to smart, specific and sustained energy provision

Adopt occasion-led strategies and precision dosing to capture energy demand

Gatorade hydration booster: Portable stick sachets target fatigue relief in the UK

Beyond energy: Yeo’s Super Sprouts’ complete functional support for children

BRAIN HEALTH: RELAXATION DRINKS AND MOOD SNACKS

Brain health: Cognition worth pursuing, but higher stakes around emotional balance

India and Indonesia lead brain health growth, driven by ayurveda and adaptogens

Untapped potential for sweet snacks to anchor products in emotional wellness

Smaller packs and hybrid confectionery formats drive growth for brain health

Acqua Catalyse elevates relaxation through scientific credibility and luxury appeal

Singaporean brand Hue taps into growing appetite for mood sweets in Southeast Asia

CONCLUSION

Metabolic, skin and immune health among most dynamic areas going forward

From guilty pleasure to smart snacking: The next leap for snacks

Opportunities for growth

Evolution of the functionalisation of diets

Questions we are asking

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