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Mood Food Market Forecasts to 2034 – Global Analysis By Product Type (Functional Beverages, and Functional Foods), Key Ingredient (Adaptogens, Botanicals & Herbal Extracts, Nootropics & Amino Acids, Probiotics, Prebiotics, and Psychobiotics, Vitamins & Minerals, Omega-3 Fatty Acids, CBD & Hemp Extracts, and Natural Sweeteners & Functional Fibers), Functional Benefit, Nature, Packaging Format, Age Group, Target Group, Distribution Channel, and By Geography

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Abstracts

According to Stratistics MRC, the Global Mood Food Market is accounted for $2.5 billion in 2026 and is expected to reach $6.7 billion by 2034 growing at a CAGR of 12.9% during the forecast period. Mood foods are functional products formulated with ingredients that positively influence mental wellbeing, cognitive function, and emotional balance through the gut-brain axis. These foods and beverages incorporate adaptogens, nootropics, probiotics, and botanical extracts designed to reduce stress, enhance focus, and promote relaxation. The market spans functional beverages, snack bars, dairy alternatives, and dietary supplements positioned as everyday consumables for consumers seeking natural mental wellness solutions.

Market Dynamics:

Driver:

Rising prevalence of stress and anxiety disorders

Global mental health challenges have reached epidemic proportions, with stress-related conditions affecting millions across all demographics. This widespread prevalence drives consumers toward proactive nutritional interventions that support emotional balance without pharmaceutical intervention. Mood foods offer accessible, stigma-free solutions integrated into daily eating routines, appealing to individuals seeking natural approaches to mental wellness. The normalization of conversations around mental health further encourages product trial, as consumers openly seek and share solutions for stress management, focus enhancement, and mood stabilization through functional food choices.

Restraint:

Limited scientific validation of efficacy

Many mood-enhancing ingredients lack robust clinical evidence supporting their psychological benefits, creating skepticism among evidence-focused consumers. Adaptogens and botanicals with traditional use histories often have limited modern research, while emerging compounds face lengthy validation timelines. This scientific gap restricts marketing claims and complicates consumer education efforts. Healthcare professionals may hesitate to recommend products without strong efficacy data, limiting professional endorsement channels. Manufacturers must invest substantially in research to substantiate benefits, increasing development costs and delaying market entry for potentially promising ingredients and formulations.

Opportunity:

Personalization through digital health integration

Advances in consumer genomics, microbiome testing, and digital health platforms enable unprecedented personalization of mood food recommendations. Consumers can now receive product suggestions tailored to their unique genetic profiles, gut compositions, and stress responses through smartphone applications and online assessments. This personalization enhances perceived efficacy and consumer engagement, as individuals experience results aligned with their specific needs. Partnerships between food manufacturers and digital health companies create new distribution channels and data-rich feedback loops, enabling continuous product refinement and strengthening consumer loyalty through customized wellness journeys.

Threat:

Regulatory scrutiny of functional claims

Regulatory authorities worldwide increasingly scrutinize psychological benefit claims made by food and beverage manufacturers. Health agencies require substantial scientific evidence before permitting statements linking ingredients to mood improvement, stress reduction, or cognitive enhancement. This regulatory environment creates compliance risks, with companies facing enforcement actions, product seizures, or mandatory label changes for unsupported claims. Evolving regulations across jurisdictions complicate international market expansion, as formulations and marketing materials require region-specific adaptations. Small innovators face particular challenges navigating complex regulatory landscapes with limited legal and scientific resources.

Covid-19 Impact:

The COVID-19 pandemic dramatically elevated consumer focus on mental wellness as isolation, uncertainty, and health anxieties intensified globally. Lockdowns prompted exploration of at-home wellness routines, including functional foods supporting emotional balance. Supply chain disruptions initially challenged ingredient sourcing, but accelerated e-commerce adoption enabled continued market access. The pandemic's enduring mental health legacy established sustained demand for mood-supporting products, with consumers maintaining heightened awareness of the connection between diet and psychological wellbeing long after acute health concerns receded.

The Functional Beverages segment is expected to be the largest during the forecast period

The Functional Beverages segment is expected to account for the largest market share during the forecast period, driven by convenience, rapid format familiarity, and frequent consumption occasions. Ready-to-drink beverages, functional powders, and herbal infusions integrate seamlessly into daily routines, requiring minimal behavioral change from consumers seeking mental wellness benefits. Beverages offer faster ingredient absorption compared to solid foods, enhancing perceived efficacy. Established distribution channels across grocery, convenience, and specialty retailers provide broad consumer access, while innovation in flavors and formulations continuously expands appeal across demographics seeking accessible mood support solutions.

The CBD & Hemp Extracts segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the CBD & Hemp Extracts segment is predicted to witness the highest growth rate, fueled by expanding legalization and mounting consumer interest in natural anxiety relief. These compounds interact with the body's endocannabinoid system, potentially promoting calm and emotional balance without psychoactive effects. Mainstream acceptance has grown rapidly as research suggests benefits for stress, sleep, and mood regulation. Product innovation across beverages, snacks, and supplements accelerates market penetration, while celebrity endorsements and social media exposure introduce these ingredients to increasingly receptive consumer demographics worldwide.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share, supported by sophisticated wellness culture, high disposable incomes, and early adoption of functional food trends. The region's consumers demonstrate strong willingness to experiment with mood-enhancing ingredients and pay premiums for mental wellness benefits. Extensive distribution networks across natural food retailers and mainstream grocery channels provide broad consumer access. Influential wellness media and vibrant startup ecosystems continuously introduce innovation, while regulatory frameworks for CBD and hemp extracts in the United States and Canada create structured market environments for ingredient experimentation.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR, driven by deep cultural familiarity with traditional medicine ingredients supporting mental wellness. Ayurvedic principles in India and Traditional Chinese Medicine practices across the region have long incorporated mood-balancing herbs and botanicals into daily consumption, creating inherent consumer acceptance. Rapid urbanization, rising disposable incomes, and escalating work-related stress expand the addressable consumer base seeking accessible mental wellness solutions. International functional food brands entering these markets through strategic partnerships, combined with local manufacturers developing regionally relevant formulations, accelerate adoption across this vast region.

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Key players in the market

Some of the key players in Mood Food Market include Nestl? S.A., Unilever PLC, PepsiCo, Inc., The Coca-Cola Company, Danone S.A., Mondelez International, Inc., General Mills, Inc., Kellogg Company, Yakult Honsha Co., Ltd., Yakult Danone India Pvt. Ltd., Hain Celestial Group, Inc., SunOpta Inc., Nature's Path Foods, Oatly Group AB, and Laird Superfood, Inc.

Key Developments:

In February 2026, Yakult announced the European launch of Yakult Vitals, a new dairy-free fermented soy drink fortified with Vitamin D and minerals, targeting the vegan functional beverage market.

In February 2026, Nestl? announced the formal engagement process to find potential partners for its Waters & Premium Beverages business, with plans for full deconsolidation by 2027 to focus on high-growth areas like Coffee and Medical Nutrition.

In December 2025, Unilever completed the demerger of its Ice Cream business, listing The Magnum Ice Cream Company N.V. as a standalone entity to allow Unilever to focus on high-margin functional and personal care markets.

Product Types Covered:

- Functional Beverages
- Functional Foods

Key Ingredients Covered:

- Adaptogens
- Botanicals & Herbal Extracts
- Nootropics & Amino Acids
- Probiotics, Prebiotics, and Psychobiotics

- Vitamins & Minerals
- Omega-3 Fatty Acids
- CBD & Hemp Extracts
- Natural Sweeteners & Functional Fibers

Functional Benefits Covered:

- Mood Regulation & Stress Reduction
- Cognitive Alertness, Energy & Focus
- Relaxation & Sleep Improvement
- Digestive Health
- Overall Emotional Well-being

Natures Covered:

- Organic
- Natural & Non-GMO
- Fortified / Functional
- Clean Label

Packaging Formats Covered:

- Bottles
- Cans

Single-Serve Sachets & Stick Packs

Multi-Pack Bars

Bulk Powders

Age Groups Covered:

Children & Teenagers

Adults (18-45) ##- ##Millennials & Gen Z

Gen X (46-60)

Seniors (60+)

Target Groups Covered:

Students & Professionals

Health & Wellness Consumers

Life-stage Specific

Distribution Channels Covered:

Supermarkets & Hypermarkets

Convenience Stores

Online Retail

Specialty Health Stores & Pharmacies

Other Distribution Channels

Regions Covered:

- North America
  - United States
  - Canada
  - Mexico
- Europe
  - United Kingdom
  - Germany
  - France
  - Italy
  - Spain
  - Netherlands
  - Belgium
  - Sweden
  - Switzerland
  - Poland
  - Rest of Europe
- Asia Pacific
  - China

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India

South Korea

Australia

Indonesia

Thailand

Malaysia

Singapore

Vietnam

Rest of Asia Pacific

South America

Brazil

Argentina

Colombia

Chile

Peru

Rest of South America

Rest of the World (RoW)

Middle East

Saudi Arabia

United Arab Emirates

Qatar

Israel

Rest of Middle East

Africa

South Africa

Egypt

Morocco

Rest of Africa

What our report offers:
- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

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Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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Note: Tables for North America, Europe, APAC, South America, and Rest of the World (RoW) Regions are also represented in the same manner as above.

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