

Mood-Regulating Functional Beverages Market Forecasts to 2034 – Global Analysis By Product Type (Functional Sparkling Waters, Adaptogenic Drinks, Nootropic Beverages, Non-Alcoholic Functional Cocktails, Functional Teas and Herbal Drinks and Functional Beverage Powders and Mixes), Functional Ingredient, Formulation, Packaging, End User and By Geography

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Abstracts

According to Statistics MRC, the Global Mood-Regulating Functional Beverages Market is accounted for \$10.0 billion in 2026 and is expected to reach \$19.9 billion by 2034 growing at a CAGR of 8.9% during the forecast period. Mood-regulating functional beverages refer to drinks formulated with specific bioactive ingredients designed to influence cognitive state, reduce stress, and promote emotional well-being. These beverages include adaptogenic drinks, nootropic beverages, and functional sparkling waters infused with ingredients like ashwagandha, L-theanine, and GABA. The technology encompasses advanced extraction and stabilization methods that ensure ingredient efficacy and shelf stability. The market serves health-conscious consumers, stress-management seekers, and the sober-curious demographic seeking alternatives to alcohol.

Market Dynamics:

Driver:

Rising consumer focus on mental wellness and stress management

The escalating global awareness of mental health and the detrimental effects of chronic

stress are driving demand for functional beverages that offer calming and focus-enhancing benefits. Consumers are actively seeking convenient, daily solutions to manage anxiety and improve cognitive performance without pharmaceutical interventions. The alignment of mood-regulating beverages with the broader wellness and self-care trends strengthens consumer adoption. This cultural shift transforms functional drinks from niche health products into mainstream lifestyle staples.

Restraint:

Regulatory complexities and substantiation of health claims

The formulation and marketing of mood-regulating beverages are subject to stringent regulatory frameworks regarding health and structure-function claims. Proving the clinical efficacy of specific adaptogens and nootropics requires extensive scientific research and regulatory approval, which is costly and time-consuming. Varying international regulations on permitted ingredients and dosage levels create fragmented compliance landscapes. These regulatory hurdles slow product innovation and limit the ability of brands to make definitive marketing claims.

Opportunity:

Expansion of the sober-curious and non-alcoholic beverage movement

The growing sober-curious movement and the decline in alcohol consumption among younger demographics present substantial opportunities for mood-regulating beverages. Non-alcoholic functional cocktails and adaptogenic drinks offer the social and sensory experience of traditional beverages without the negative health impacts of alcohol. Brands that successfully replicate the complex flavor profiles and relaxation benefits of alcoholic drinks will capture significant market share. This trend aligns with the broader consumer shift toward mindful consumption and holistic well-being.

Threat:

Supply chain volatility for specialized botanical ingredients

The production of mood-regulating beverages relies heavily on specialized botanical ingredients like ashwagandha, rhodiola, and L-theanine, which are susceptible to agricultural and supply chain disruptions. Climate change impacts on crop yields and geopolitical tensions affecting global trade can lead to sudden spikes in raw material costs. These fluctuations compress profit margins for beverage manufacturers and create pricing instability for consumers. Supply chain vulnerabilities also risk production delays, impacting brand reliability.

Covid-19 Impact:

The pandemic significantly heightened global stress and anxiety levels, accelerating consumer interest in mental wellness and immune-supporting products. Initial supply chain disruptions affected the availability of specialized botanical extracts and packaging materials. However, the crisis reinforced the need for accessible, daily stress-management solutions, strengthening long-term demand for functional beverages. Post-pandemic, the sustained focus on mental health and preventive wellness continues to drive market growth.

The Adaptogenic Drinks segment is expected to be the largest during the forecast period

The Adaptogenic Drinks segment is expected to account for the largest market share during the forecast period, due to the widespread consumer recognition of adaptogens like ashwagandha and reishi for stress relief. These beverages offer a natural, holistic approach to managing cortisol levels and promoting emotional balance. The segment benefits from strong integration into the daily wellness routines of health-conscious consumers. High availability of adaptogenic ingredients and established manufacturing processes support market dominance.

The Nootropics segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the Nootropics segment is predicted to witness the highest growth rate, driven by increasing demand for cognitive enhancement and focus improvement among students and professionals. Ingredients like L-theanine and GABA provide measurable benefits for attention and mental clarity without the jittery effects of high caffeine. Advances in nootropic formulation and bioavailability improve product efficacy and consumer satisfaction. The segment aligns with the growing trend of biohacking and performance optimization.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share, due to high consumer awareness of functional ingredients and a strong culture of wellness optimization. The United States leads with a robust ecosystem of functional beverage startups and established CPG companies expanding their portfolios. Favorable regulatory frameworks for dietary supplements and strong retail distribution networks drive market development. High disposable incomes enable consumers to afford premium functional beverages.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR, driven by traditional cultural familiarity with herbal and adaptogenic ingredients, combined with modern functional beverage trends. China and Japan represent major growth markets with increasing demand for stress-relief and cognitive-enhancing products. Local manufacturers are leveraging traditional medicine knowledge to create

innovative, modern beverage formats. Government initiatives promoting health and wellness create favorable policy environments.

Key players in the market

Some of the key players in Global Mood-Regulating Functional Beverages Market include The Coca-Cola Company, PepsiCo, Inc., Keurig Dr Pepper Inc., Monster Beverage Corporation, Kin Euphorics, Inc., Recess, Inc., TRIP Drinks Ltd., VYBES, De Soi, Three Spirit Drinks, Hiyo, Inc., Moment Health, Inc., Just Chill, OLIPOP Inc., LIFEAID Beverage Company, and REBBL Inc.

Key Developments:

In May 2026, The Coca-Cola Company launched a new line of adaptogenic sparkling waters infused with ashwagandha and L-theanine, targeting the stress-management and sober-curious consumer segments.

In April 2026, Kin Euphorics, Inc. expanded its distribution in European markets, introducing a new non-alcoholic functional cocktail formulated with nootropics to enhance social connectivity and relaxation.

In March 2026, Recess, Inc. introduced a powdered formulation of its popular mood-regulating beverage, offering consumers a convenient, customizable option for daily stress management.

Product Types Covered:

Functional Sparkling Waters

Adaptogenic Drinks

Nootropic Beverages

Non-Alcoholic Functional Cocktails

Functional Teas and Herbal Drinks

Functional Beverage Powders and Mixes

Functional Ingredients Covered:

Adaptogens

Nootropics

Botanical Extracts

Amino Acids and Vitamins

Formulations Covered:

Carbonated Formulations

Still Beverages

Ready-to-Drink Formulations

Concentrated Liquid Formulations

Powdered Formulations

Multi-Functional Formulations

Packaging Covered:

Aluminum Cans

Glass Bottles

PET Bottles

Cartons and Tetra Packs

Sachets and Stick Packs

Other Packaging Formats

End Users Covered:

General Wellness Consumers

Stress-Management Consumers

Sober-Curious Consumers

Health-Conscious Millennials

Gen Z Consumers

Performance and Productivity Consumers

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

Japan

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

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

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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