

SPATE



**RE-THINKING BETTER-FOR-YOU THROUGH
THE EYES OF CONSUMERS:**

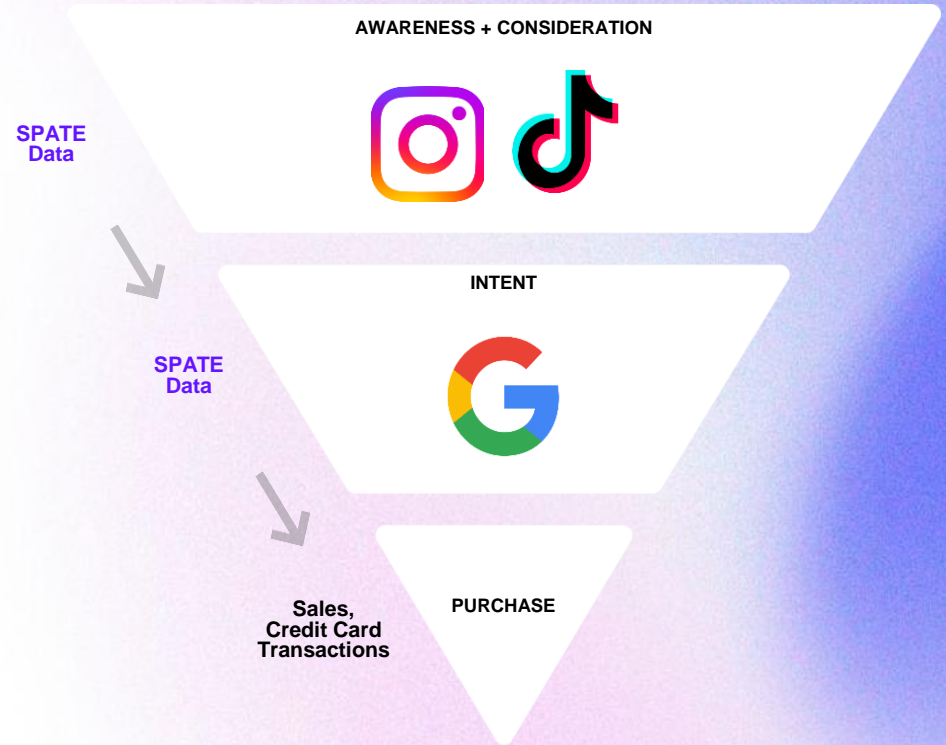
WHAT GOOGLE, TIKTOK, AND
INSTAGRAM TRENDS REVEAL ABOUT
THE FUTURE OF WELLNESS FOOD



PRE-SALES DATA TO STAY AHEAD OF CONSUMER TRENDS

Social Media is about consumers' aspirations. Consumers are building the persona of who they want to be, not necessarily reflecting their actual behaviour.

Google Search, a “digital truth serum,” reveals an honest picture of consumer desires. People will search something they may not be comfortable asking their mother or best friend. According to a correlative study, search is a strong indicator of future sales.



SPATE'S PROPRIETARY POPULARITY INDEX

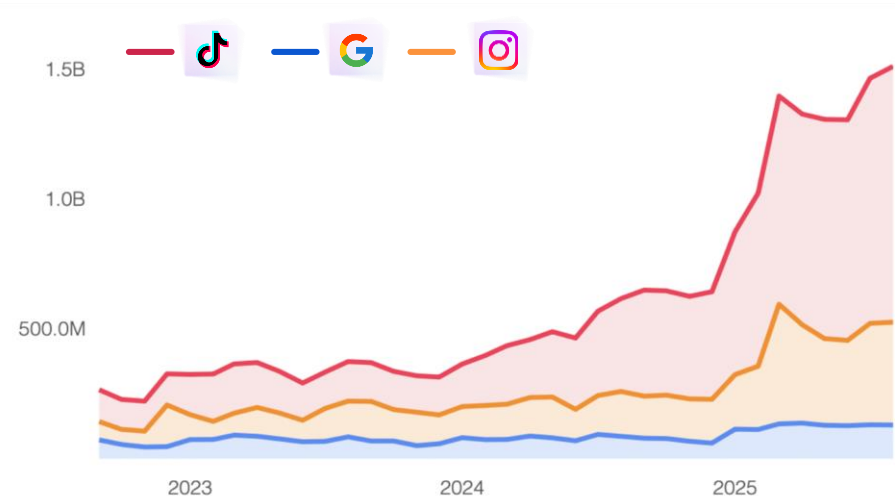
WHAT IS THE POPULARITY INDEX?

The Popularity Index combines data from Google, TikTok and Instagram to show how popular a category or trend is.

For example, looking at the graph on the right, the trend for “Matcha” in the US grew by 148.7% over the past year.

The index measures how “Matcha” compares to all other food and beverage trends on TikTok, Instagram and Google.

It adjusts for growth differences on each platform to accurately reflect the increase in popularity.



The Popularity Index for “Matcha” for Google Searches, TikTok Views & Instagram Views in the US.

LIFESTYLE AND DIET TRENDS



LIFESTYLE & WELLNESS DIETS

HOW BIG IS THIS TREND?

Medium, High, and Very High Popularity

WILL IT LAST?

Likely & Very Likely

CLUSTER INCLUDED

Sustained Riser, Seasonal Riser, Rising Star

Top Trends by Increase



High Protein Diet:
+82.9M YoY



Carnivore Diet:
+33.4M YoY



Low Calorie Diet:
+10.1M YoY

Top Trends by Growth



Whole Food Diet:
+230.3% YoY



Low Histamine Diet:
+80.9% YoY



Carnivore Diet:
+50.1% YoY

TREND SPOTLIGHT

WHOLE FOOD DIET

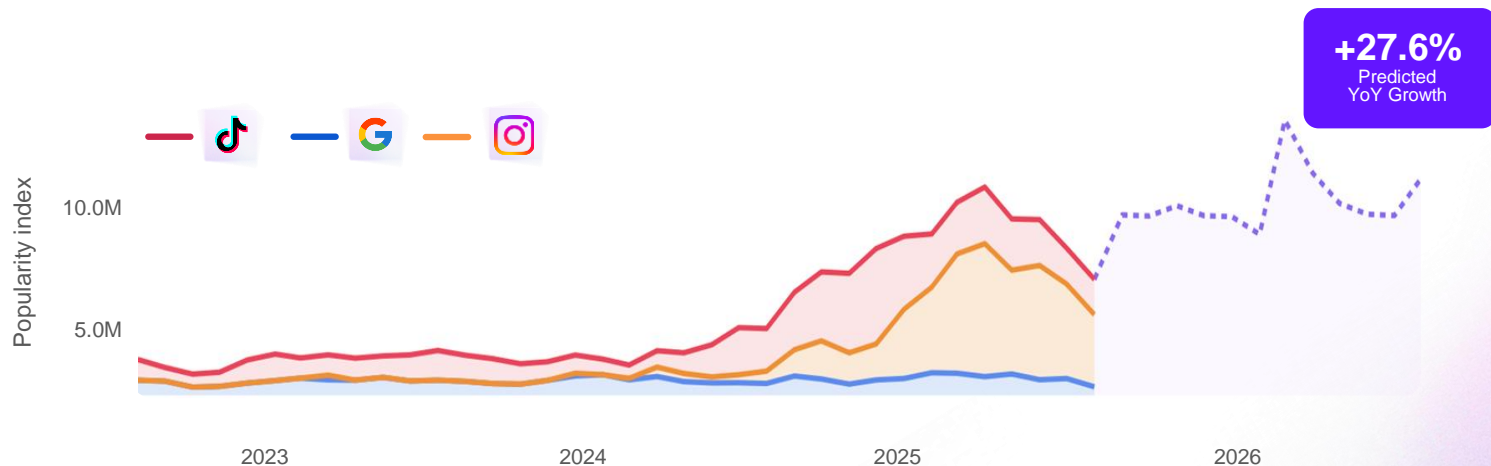


6.1M

AVERAGE MONTHLY POPULARITY SCORE

+230.3%

POPULARITY YOY GROWTH



Source: Popularity Index: Google Search + TikTok Views from Sep 22, 2024 to Sep 21, 2025 vs. Sep 24, 2023 to Sep 22, 2024



WHOLE FOOD DIET: AREAS OF INTEREST

Top Related Benefits by Increase



Healthy:
+7.6K



Weight Loss:
+2.2K



Quick:
+1.5K

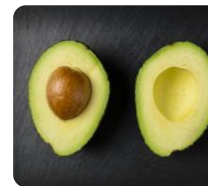
Top Related Ingredients by Increase



Protein:
+18.0K



Steak:
+9.2K



Avocado:
+4.4K

WHOLE FOOD DIET

TOP BRANDS BY POPULARITY



Source: Popularity Index: Google Search + TikTok Views from Sep 22, 2024 to Sep 21, 2025 vs. Sep 24, 2023 to Sep 22, 2024

EMERGING WELLNESS THEMES

ENERGY & FOCUS

A collection of various pills and capsules in different colors (white, red, yellow, orange) scattered on a light yellow background.

NAD SUPPLEMENT

+9.3M
Increase in Avg.
Monthly Popularity

A white plastic tub of Creatine Monohydrate with a blue label. The label features a muscular arm and the text 'CREATINE MONOHYDRATE' and 'MUSCLE & STRENGTH'. A small white scoop is resting on the tub. Some white powder is spilled on the surface in front of the tub.

CREATINE

+39.8M
Increase in Avg.
Monthly Popularity

A white ceramic cup filled with a light-colored beverage, possibly tea or coffee, sitting on a white saucer. The cup and saucer are surrounded by green leaves and small yellow flowers on a light yellow background.

L-THEANINE


+16.0M
Increase in Avg.
Monthly Popularity

BEAUTY FROM WITHIN

A woman with dark hair is smiling and holding a white bottle of collagen supplement. The background is a soft-focus outdoor setting with greenery.


COLLAGEN

+26.4M
Increase in Avg.
Monthly Popularity

A woman is lying down, receiving a facial treatment. A person in a white lab coat and pink gloves is applying a product to her face. The setting appears to be a spa or clinic.

RESVERATROL

+6.8M
Increase in Avg.
Monthly Popularity

A woman with long brown hair is smiling and wearing a white, textured face mask. She is also wearing a straw hat. The background is a bright, outdoor setting.

NICOTINAMIDE MONONUCLEOTIDE

+2.8M
Increase in Avg.
Monthly Popularity



WELLNESS MACRO TRENDS

WEIGHT MANAGEMENT AND METABOLISM

SHILAJIT GUMMIES

+18.0M
Increase in Avg.
Monthly Popularity

WEIGHT LOSS SUPPLEMENT

+1.1M
Increase in Avg.
Monthly Popularity

BERBERINE

+4.1M
Increase in Avg.
Monthly Popularity

Source: Popularity Index: Google Search + TikTok Views from Sep 22, 2024 to Sep 21, 2025 vs. Sep 24, 2023 to Sep 22, 2024

FORMATS AND CROSSTOVERS

TREND SPOTLIGHT

FUNCTIONAL BEVERAGES

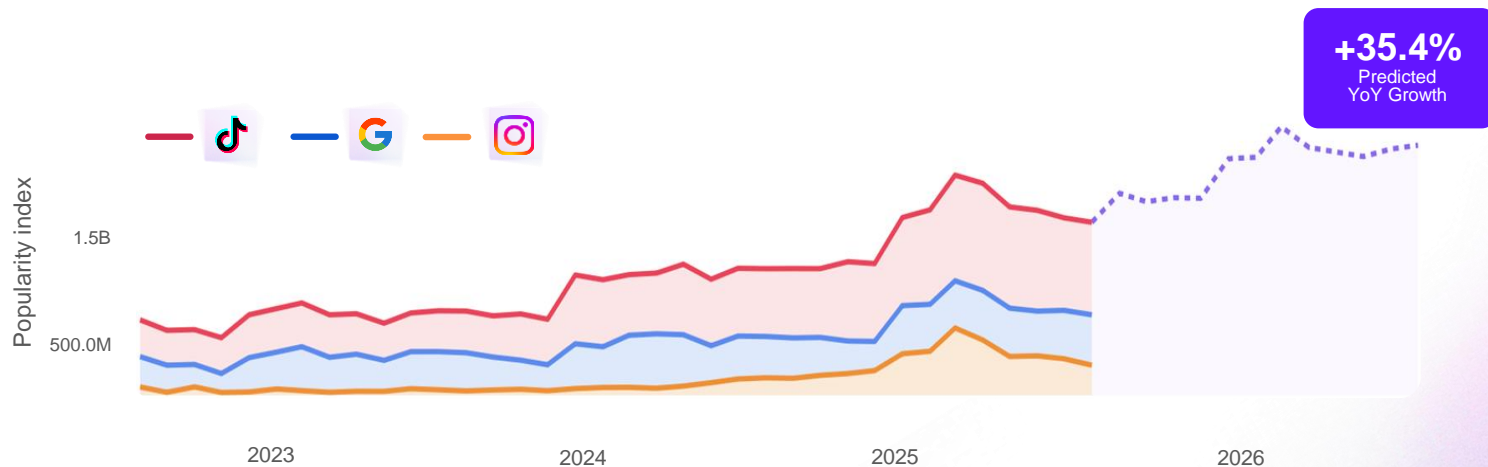


1.0B

AVERAGE MONTHLY POPULARITY SCORE

+56.6%

POPULARITY YOY GROWTH



Source: Popularity Index: Google Search + TikTok Views from Sep 22, 2024 to Sep 21, 2025 vs. Sep 24, 2023 to Sep 22, 2024

FUNCTIONAL BEVERAGES



ELECTROLYTE DRINK

+13.3M
Increase in Avg.
Monthly Popularity



CHLOROPHYLL WATER

+6.1M
Increase in Avg.
Monthly Popularity



PROTEIN SODA

+1.2M
Increase in Avg.
Monthly Popularity

PROTEIN SODA

INGREDIENT SPOTLIGHT

PROTEIN SODA



WHAT ARE CONSUMERS VIEWING?

 **>1,000%**
(YEAR-OVER-YEAR)

Top Videos by Total Views



@meganandy1217



@betterbuytheday



@brookevestrand

Top Brands	Views↓
#buckedup	394.5K
#cleansimpleeats	3.3K
#dietcoke	705.0

Top Benefits	Views↓
#proteinpacked	227.6K
#glowup	1.1K
#wellness	523.0

Source: US TikTok data, ending Sep 7; these numbers represent actual data and are not adjusted for platform-specific growth; *related hashtags refer to the ingredient as a whole, specifically filtered for functional snacks.

TREND SPOTLIGHT

FUNCTIONAL SNACKS

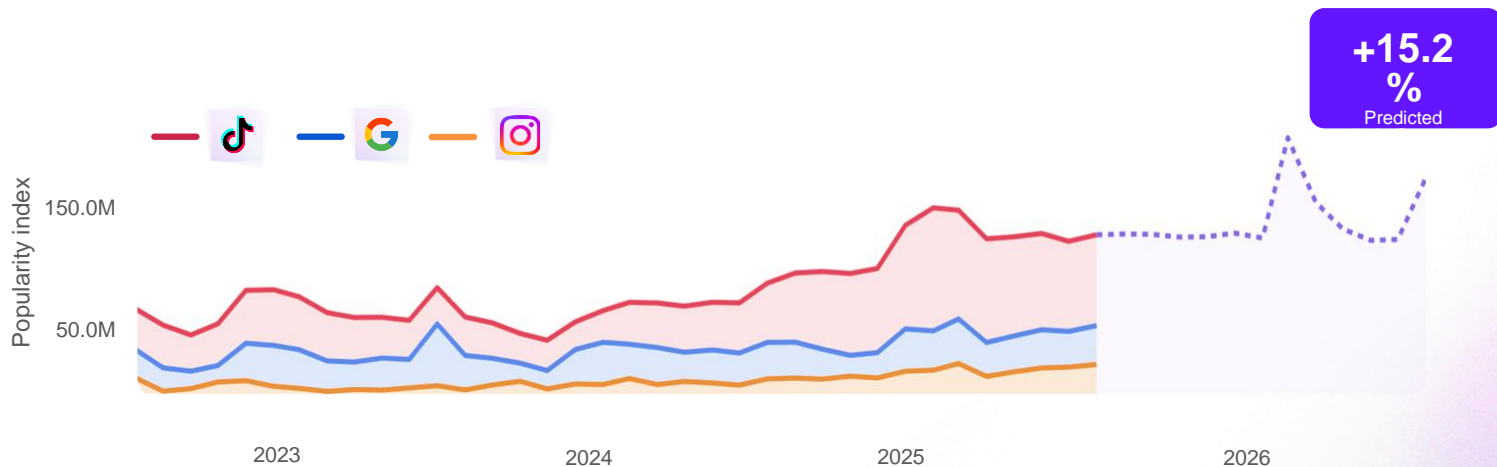


93.6M

AVERAGE MONTHLY POPULARITY SCORE

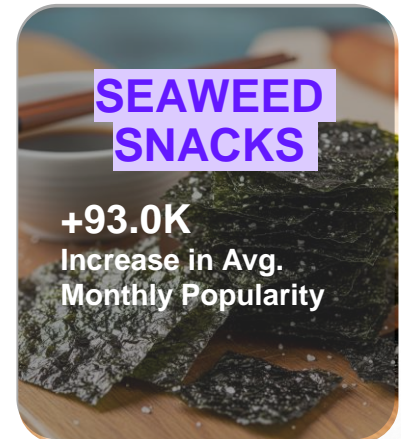
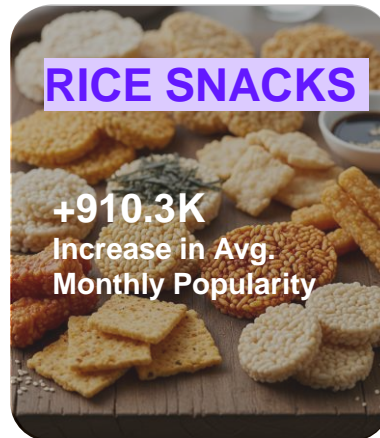
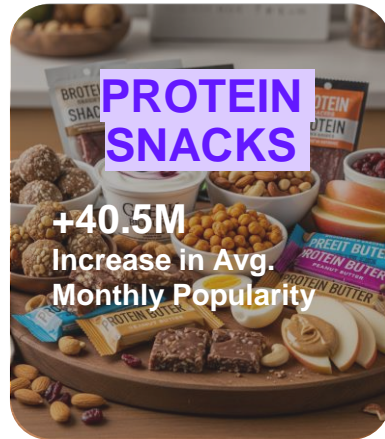
+84.7%

POPULARITY YOY GROWTH



Source: Popularity Index: Google Search + TikTok Views from Sep 22, 2024 to Sep 21, 2025 vs. Sep 24, 2023 to Sep 22, 2024

FUNCTIONAL SNACKS



TREND SPOTLIGHT

RICE SNACKS

POPULARITY SHARE %:
Share of US Google Search
popularity vs. TikTok



MEDIUM POPULARITY

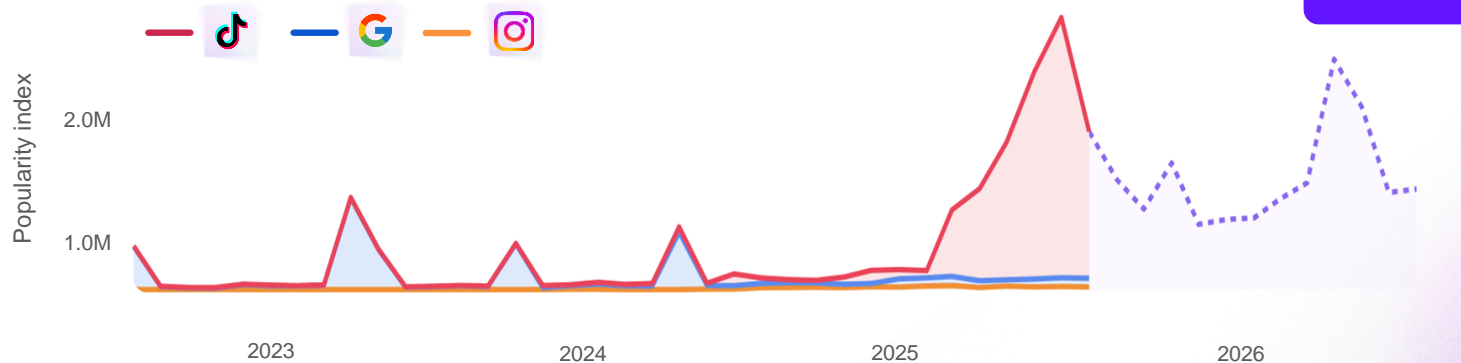
975.1K AVERAGE MONTHLY POPULARITY SCORE

+487.3%

POPULARITY YOY GROWTH

89.4%

INSTAGRAM SHARE



Source: Popularity Index: Google Search + TikTok Views from Sep 22, 2024 to Sep 21, 2025 vs. Sep 24, 2023 to Sep 22, 2024



BRAND SPOTLIGHT

DRIZZILICIOUS



HIGH POPULARITY



+603.2%
(YEAR-OVER-YEAR)



>1,000%
(YEAR-OVER-YEAR)

TOP SEARCH QUERIES

- drizzilicious rice cakes*
- drizzilicious*
- drizzilicious near me*
- drizzilicious costco*
- drizzilicious mini rice cakes*
- drizzilicious flavors*
- drizzilicious birthday cake*

Top Video Across #drizzilicious



@chase.d.tts



@dailyreviews101



@kelsietrosclair

TRENDING INGREDIENTS IN FUNCTIONAL SNACKS

TOP FUNCTIONAL SNACK INGREDIENTS BY POPULARITY INCREASE

THE TOP INGREDIENTS DRIVING MOST SIGNIFICANT CHANGE IN POPULARITY

Trend	Popularity Index	How big is this trend?	Increase YoY↓	YoY
protein	1.1M	very high popularity	+486.1K	+86.1%
collagen	613.1K	very high popularity	+457.3K	+293.3%
magnesium	26.9K	very high popularity	+26.8K	>1,000%
oats	43.8K	very high popularity	+25.3K	+136.6%
creatine	24.0K	very high popularity	+20.9K	+666.7%
lion's mane mushroom	23.5K	very high popularity	+19.3K	+461.8%
ashwagandha	10.6K	very high popularity	+10.4K	>1,000%
yogurt	6.3K	very high popularity	+6.2K	>1,000%
cottage cheese	12.0K	very high popularity	+6.2K	+105.8%
chicken	6.2K	very high popularity	+4.6K	+291.1%

Source: Popularity Index: Google Search + TikTok Views + Instagram Posts from Sep 2024 to Aug 2025 vs. Sep 2023 to Aug 2024





COLLAGEN

INGREDIENT SPOTLIGHT

FUNCTIONAL SNACKS + COLLAGEN



WHAT ARE CONSUMERS SEARCHING?

G +645.6%
(YEAR-OVER-YEAR)

TOP SEARCH QUERIES

- collagen protein bars
- vital proteins collagen bars
- everydaze collagen
- further food chocolate collagen
- peptides protein powder plus reishi mushroom
- primal kitchen collagen bars
- built bar collagen
- bulletproof collagen protein bars



Top Questions	Search Volume↓
best	192.4K
what is	76.6K
vs	35.7K

Top Concerns	Search Volume↓
nutrition	25.5K
weight	25.5K
wrinkle	5.2K

Source: US Search - from Sep 2024 to Aug 2025 vs. Sep 2023 to Aug 2024; these numbers represent actual data and are not adjusted for platform-specific growth; *related searches refer to the ingredient as a whole, specifically filtered for functional snacks



INGREDIENT SPOTLIGHT

FUNCTIONAL SNACKS + COLLAGEN



WHAT ARE CONSUMERS VIEWING?

 **+464.8%**
(YEAR-OVER-YEAR)

Top Videos Alongside Collagen



@_thekayrenee



@katyclark9



@mercercaiden

Top Concerns

	Views↓
#guthealth	399.4K
#bloatingrelief	111.6K
#nutrition	46.1K

Top Benefits

	Views↓
#antiaging	1.7M
#health	1.0M
#wellness	993.8K

Source: US TikTok data, ending Sep 21; these numbers represent actual data and are not adjusted for platform-specific growth; *related hashtags refer to the ingredient as a whole, specifically filtered for functional snacks.

COLLAGEN

COLLAGEN

TOP BRANDS BY POPULARITY



MICRO INGREDIENTS
16.4M
AVG. MONTHLY POPULARITY



BUILT BAR
2.1M
AVG. MONTHLY POPULARITY



PRIME BITES
1.8M
AVG. MONTHLY POPULARITY

Source: Popularity Index: Google Search + TikTok Views + Instagram Posts from Sep 2024 to Aug 2025 vs. Sep 2023 to Aug 2024

SPATE POV: **KEY TAKEAWAYS**

From Restriction to Balance

Consumers are moving beyond restrictive diets like keto and vegan toward **high protein and whole food approaches**. The surge in Whole Food Diets highlights demand for sustainable, nutrient-dense choices and signals a shift to **holistic, lifestyle-driven wellness**.

Functionality in Daily Formats

Wellness is being embedded into everyday routines through **functional beverages and snacks**. Viral trends like protein sodas and rice snacks show consumers want convenient formats that deliver real health benefits.

Ingredients as Icons

Ingredients such as **protein, collagen, creatine, and berberine** are driving behavior as consumers seek **specific outcomes** from gut health to anti-aging. Ingredient-led positioning is becoming the most powerful way for brands to build trust and relevance.

**DOWNLOAD
TODAY'S PRESENTATION**

