

# Consumer Trends

Food & Beverage 2026

EXPO  
SPECIAL!

The New Consumer

Coefficient  
Capital

DATA PROVIDED BY

 instacart



# The New Consumer

- Launched in 2019 by longtime business journalist Dan Frommer
- Exploring how and why people spend their time and money
- Analysis, research, trends, and advisory
- [newconsumer.com](https://newconsumer.com)

Coefficient  
Capital

# Coefficient Capital

- Launched in 2018
- Leading venture and growth stage investments
- Focus on transformational consumer shifts
- Manage ~\$750 million in AUM
- [coefficientcap.com](http://coefficientcap.com)

# Coefficient Capital Portfolio

EXIT

**NOM NOM**

Personalized  
pet nutrition

EXIT

**JUST  
SPICES**

Cooking solutions for  
the new consumer

IPO / EXIT

THE ORIGINAL  
**OATLY!**

Global plant-based  
dairy leader

**MAGIC  
SPOON**

Low-carb  
breakfast innovator

**SESAME**

Direct-to-patient  
healthcare

**MILANO  
VICE**

Next-generation  
restaurant brand

**lemme**

Innovative  
wellness brand

EXIT

**kate farms**

Clinical  
nutritional formulas

**GORGIE**

Functional energy  
beverage company

**SAUZ**

Pasta sauce for the  
modern consumer

**STARSHIP**

Autonomous, robotic  
last-mile delivery

**zoe**

Science-backed  
personalized nutrition

**KoRe**

Healthy  
European snacking

**untamed**

Pantry fresh  
cat nutrition

NEW

**SINCERELY  
YOURS**

Skincare brand for  
the next generation

NEW

**TRIP**

Functional calming  
beverage company

# Consumer Trends

**SPECIAL!**

- We're back with a **special report** for Spring 2026, focused on food and beverage
- Special thanks to our insights partner Instacart for exclusive online grocery data: [instacart.com](https://instacart.com)
- View the latest and our previous reports: [newconsumer.com/trends](https://newconsumer.com/trends)

# Consumer Trends Survey

- A big part of our research is our proprietary **Consumer Trends Survey**
- We've now conducted 15 surveys of 3,000+ US consumers, most recently in February 2026
- Powered by Toluna, “delivering real-time consumer insights at the speed of the on-demand economy” [tolunacorporate.com](https://tolunacorporate.com)

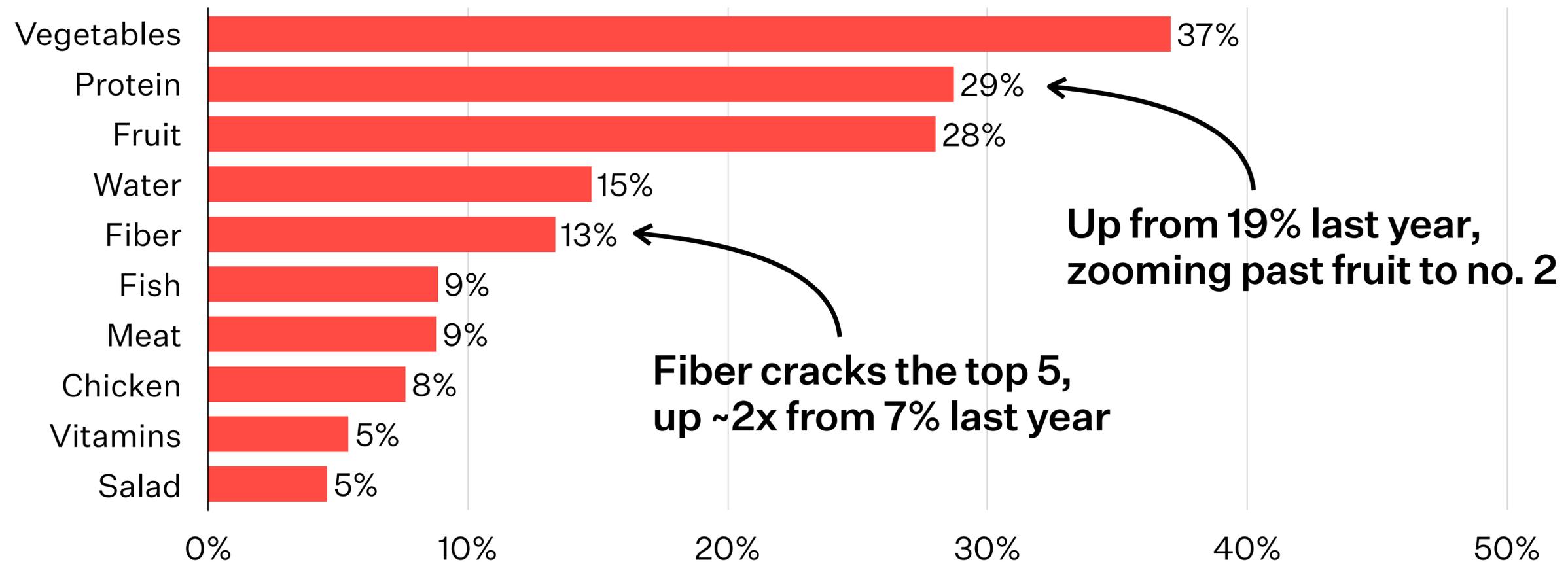
1

How do Americans want to eat,  
drink, and live this year?

We just asked 3,000.

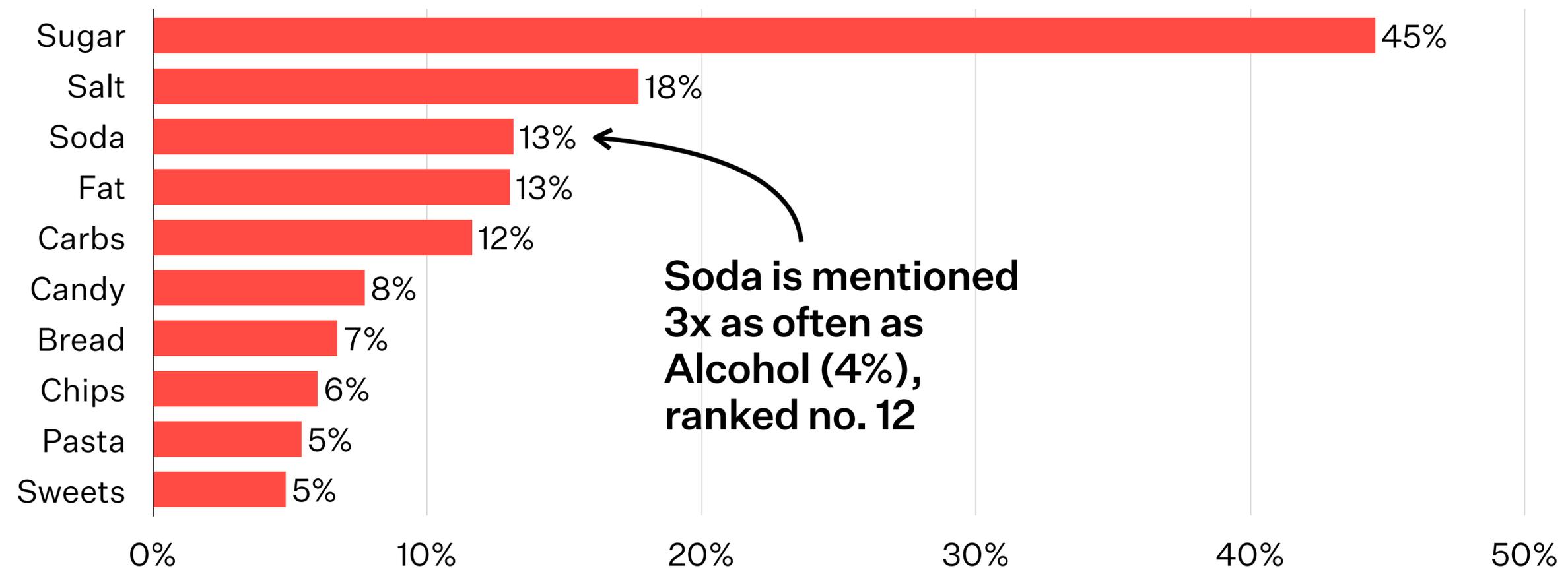
# We asked 3,000 Americans what they want to consume *more* of this year...

Percentage of respondents writing in each specific term  
(Submit three.)



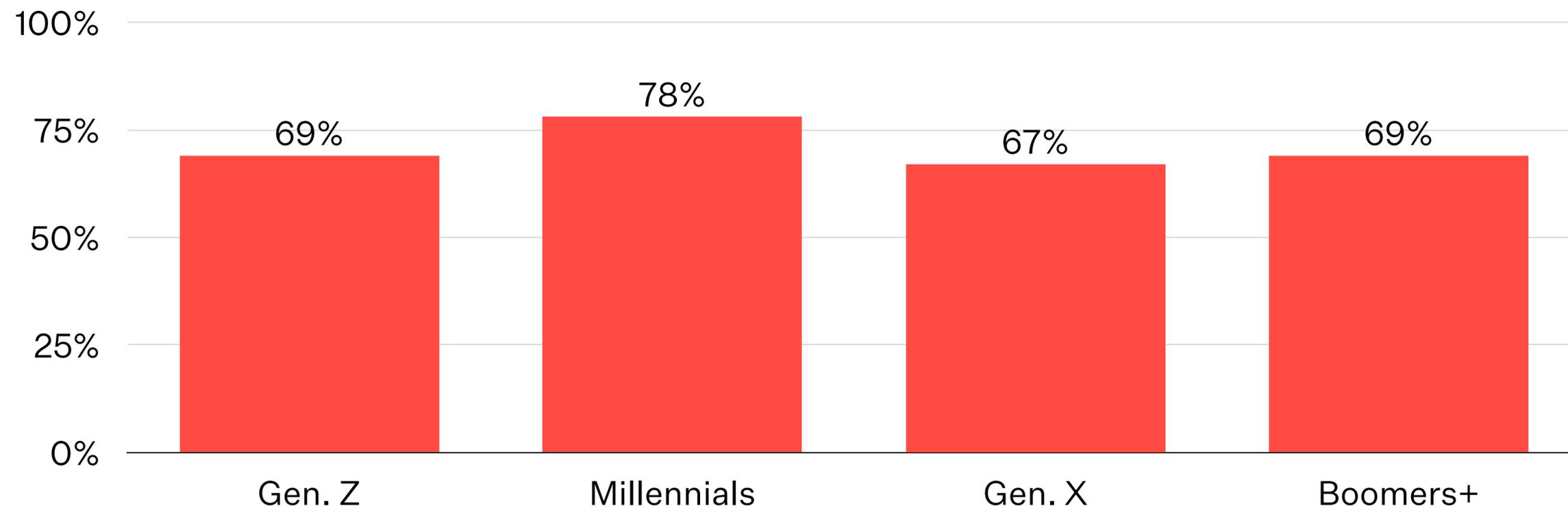
# ...and what they want to consume *less* of this year

Percentage of respondents writing in each specific term  
(Submit three.)



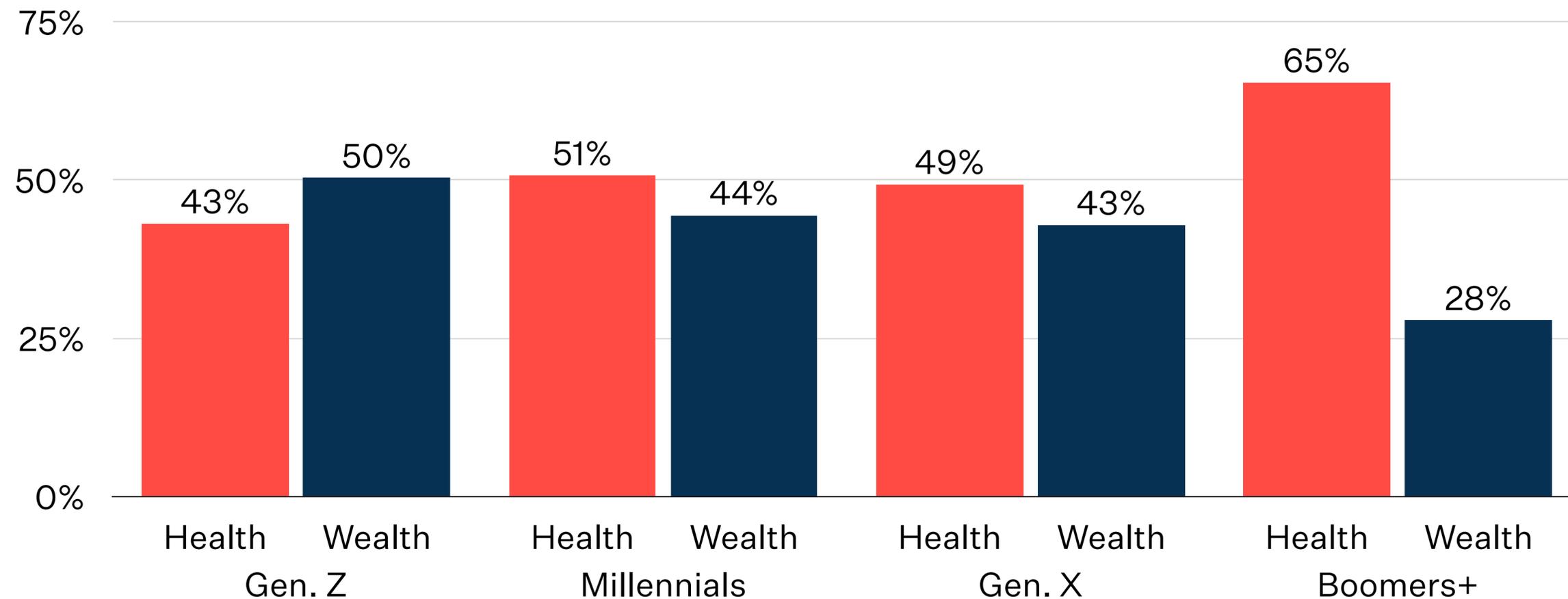
# Most Americans plan to prioritize their health and wellness over the next year

Percentage of 'The top priority' and 'A high priority' responses by generation: Over the next year, how do you plan to prioritize your health and wellness?



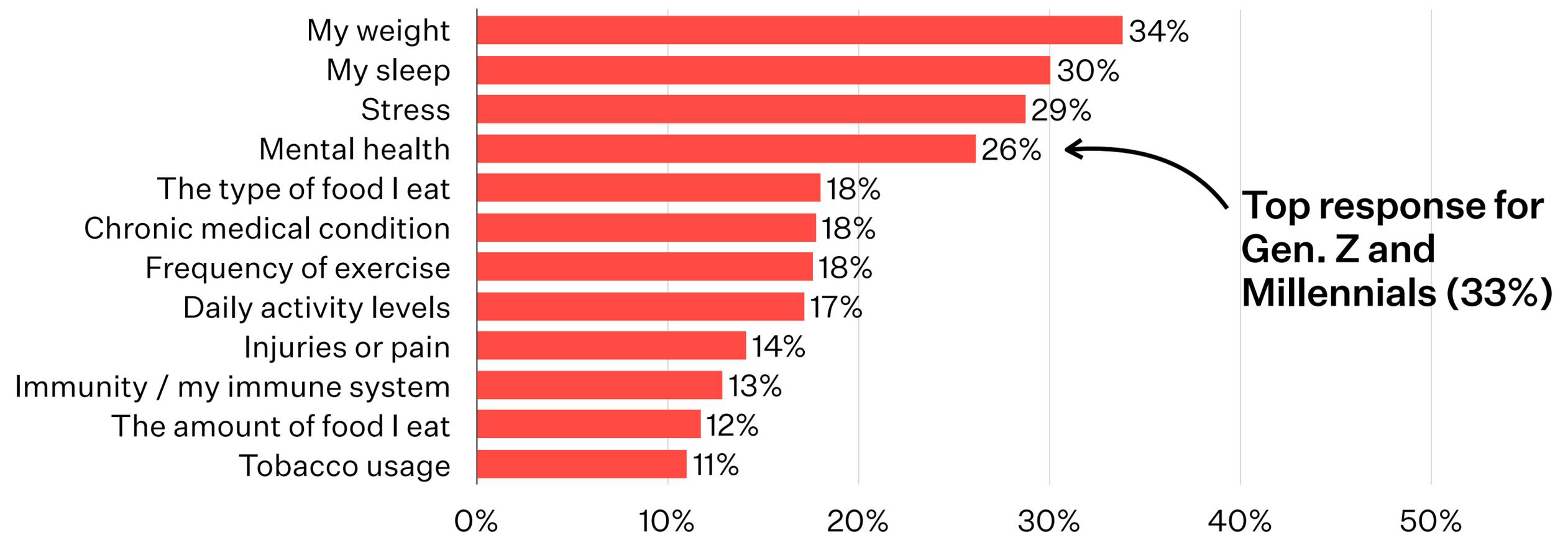
# More Americans would rather feel 25% healthier than earn 25% more money

Percentage of responses: If you could only choose one, would you rather feel 25% healthier or earn 25% more money?



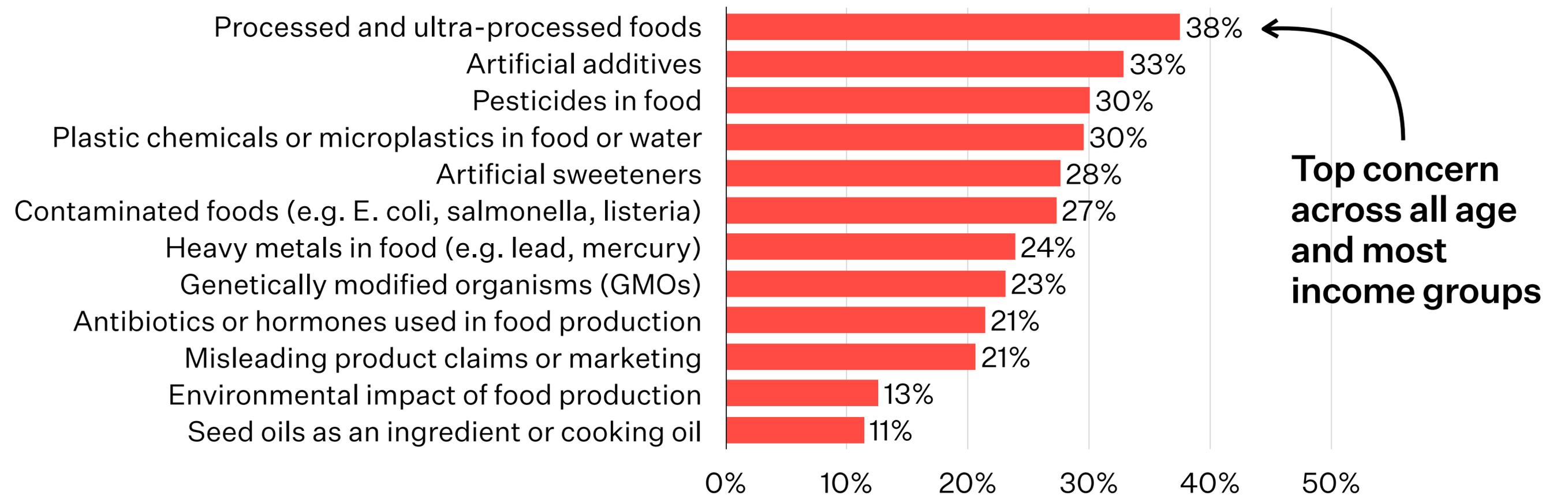
# Americans say they're most concerned about their weight, sleep, and stress

Percentage of responses: What aspects of your health are you most concerned about? (Choose up to three.)



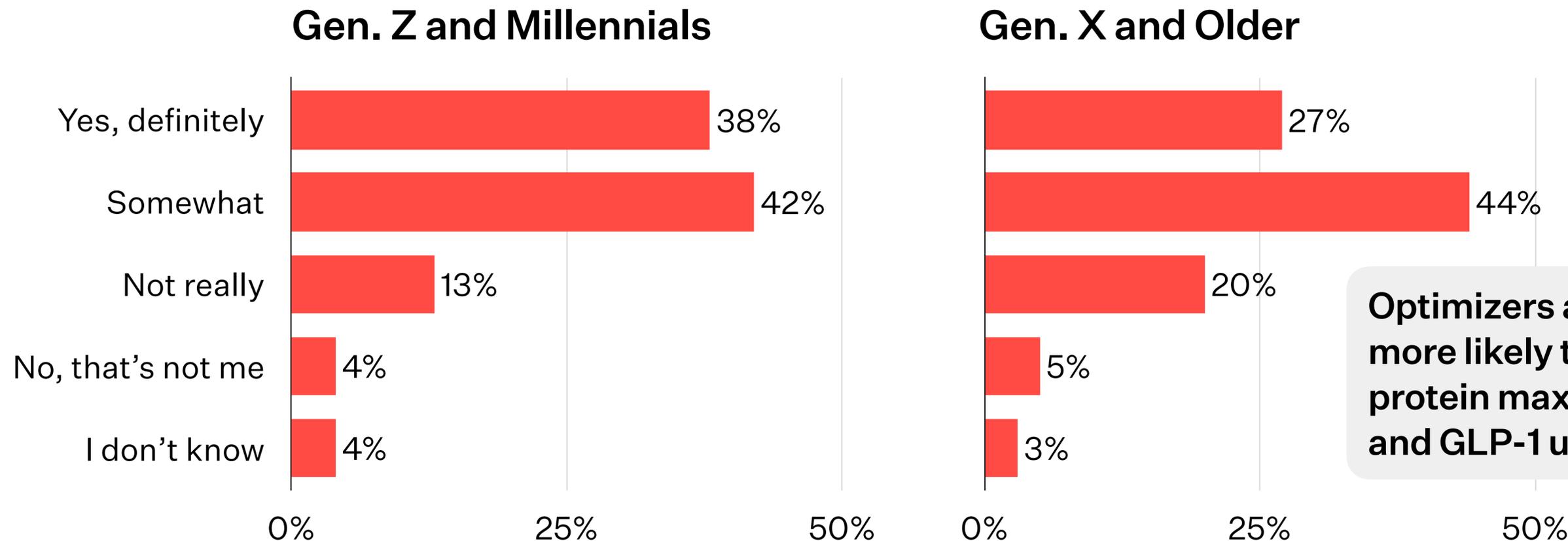
# US consumers' top food concerns: Processed foods and unwanted additives

Which of the following are you most concerned about regarding the food you eat? (Choose up to five.)



# 38% of Gen. Z and Millennials consider themselves in 'optimization mode'

Would you say you're in 'optimization mode', actively making choices to improve energy, appearance, and long-term health?



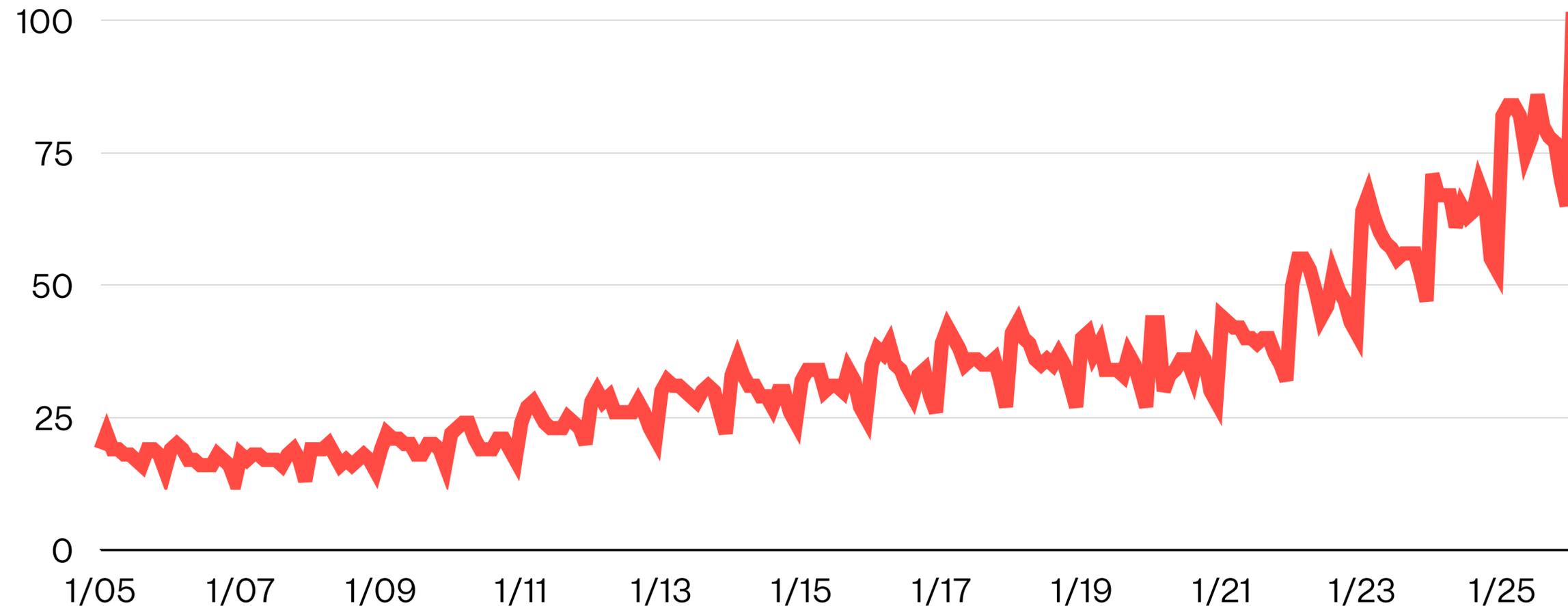
**Optimizers are more likely to be protein maxxers and GLP-1 users**

2

Are we at peak protein?

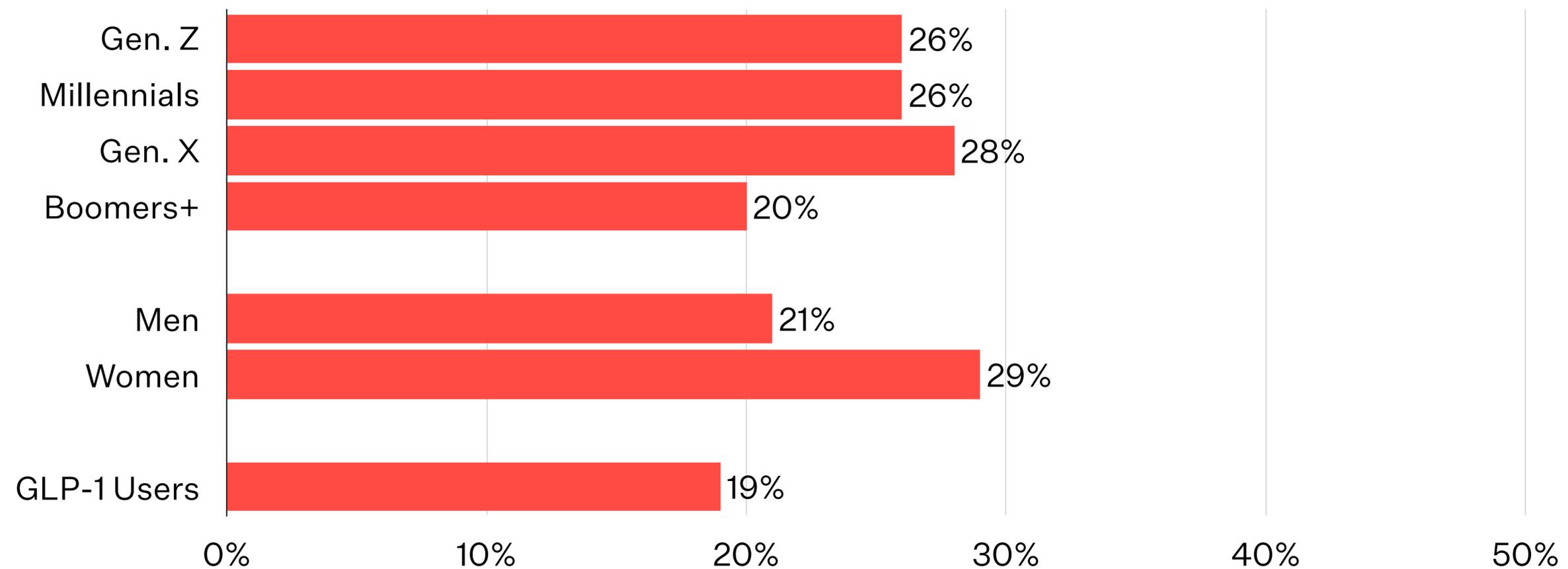
# Search queries for 'protein' just set another all-time record

Indexed Google web search volume for 'protein', US only



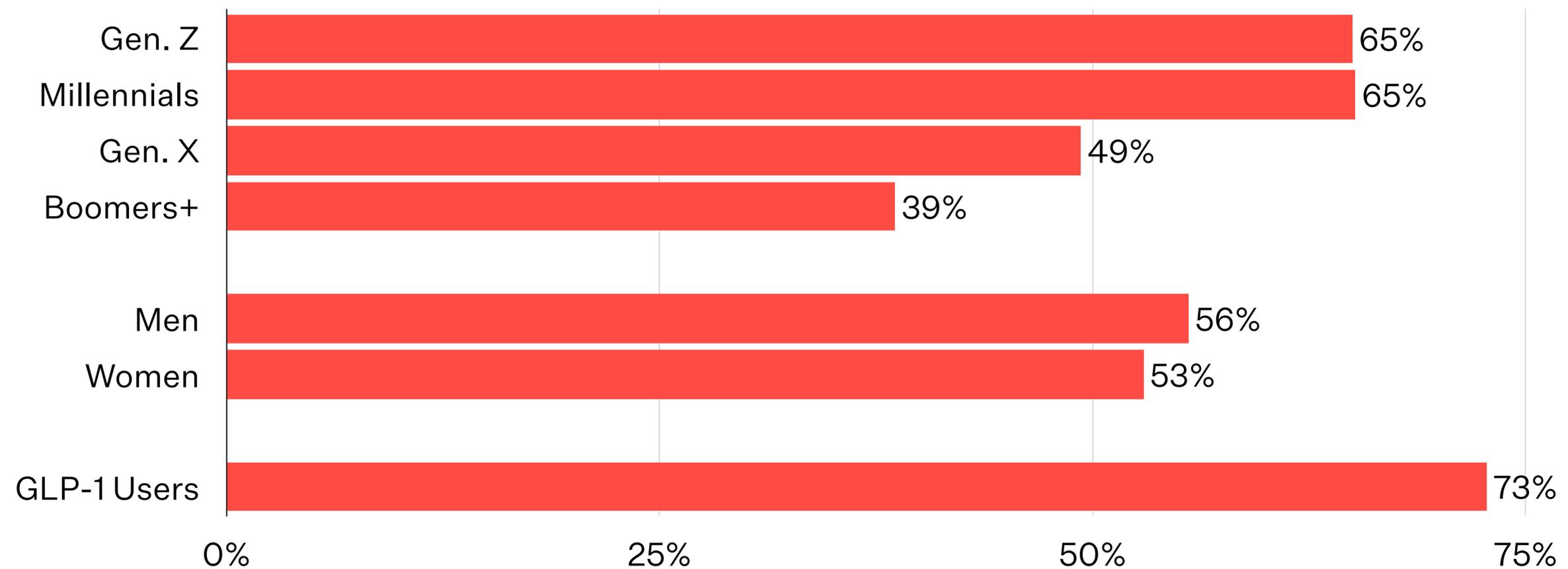
# A quarter of Americans think they're not consuming enough protein

Percentage of 'No' responses: Do you feel like you're getting enough protein in your diet?



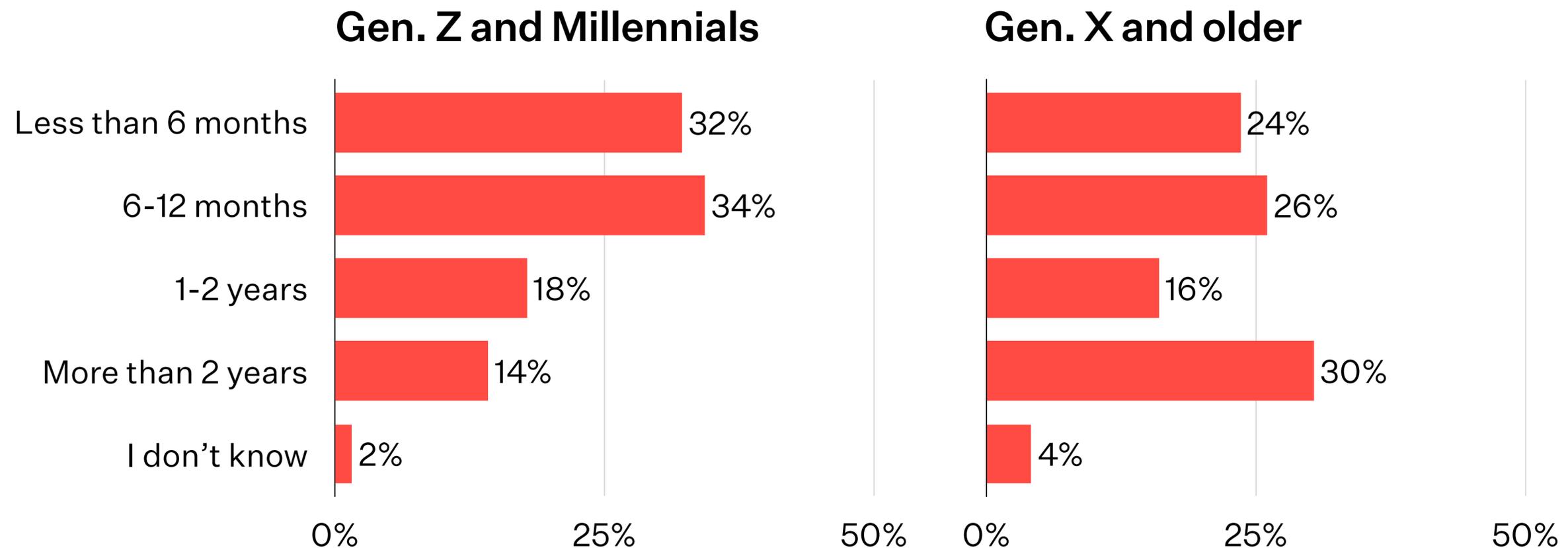
# 65% of Gen. Z and Millennials say they're actively trying to consume more protein

Percentage of 'Yes' responses: Do you consider yourself someone who is actively trying to get more protein in your diet?



# Most people trying to get more protein started in the past year

Percentage of responses: How long have you been actively trying to get more protein in your diet?



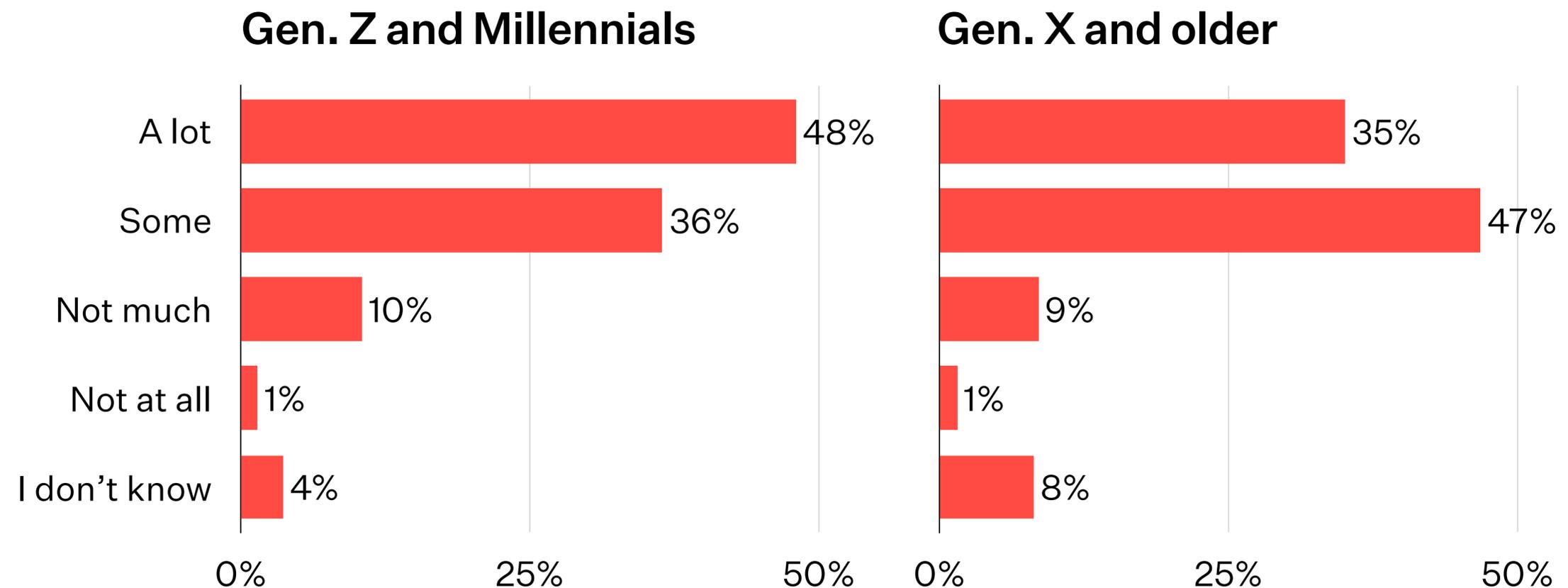
# Instacart's largest growth categories for 2025 were protein-coded

Categories ranked by the highest absolute increase in item share, US Instacart baskets in 2025

|   |                          |    |                                |
|---|--------------------------|----|--------------------------------|
| 1 | Greek & Icelandic yogurt | 6  | Protein drinks                 |
| 2 | Protein bars             | 7  | Chocolate candies              |
| 3 | Spring water             | 8  | Probiotic and prebiotic drinks |
| 4 | Hass avocado             | 9  | Cottage cheese                 |
| 5 | Sourdough bread          | 10 | Ground beef                    |

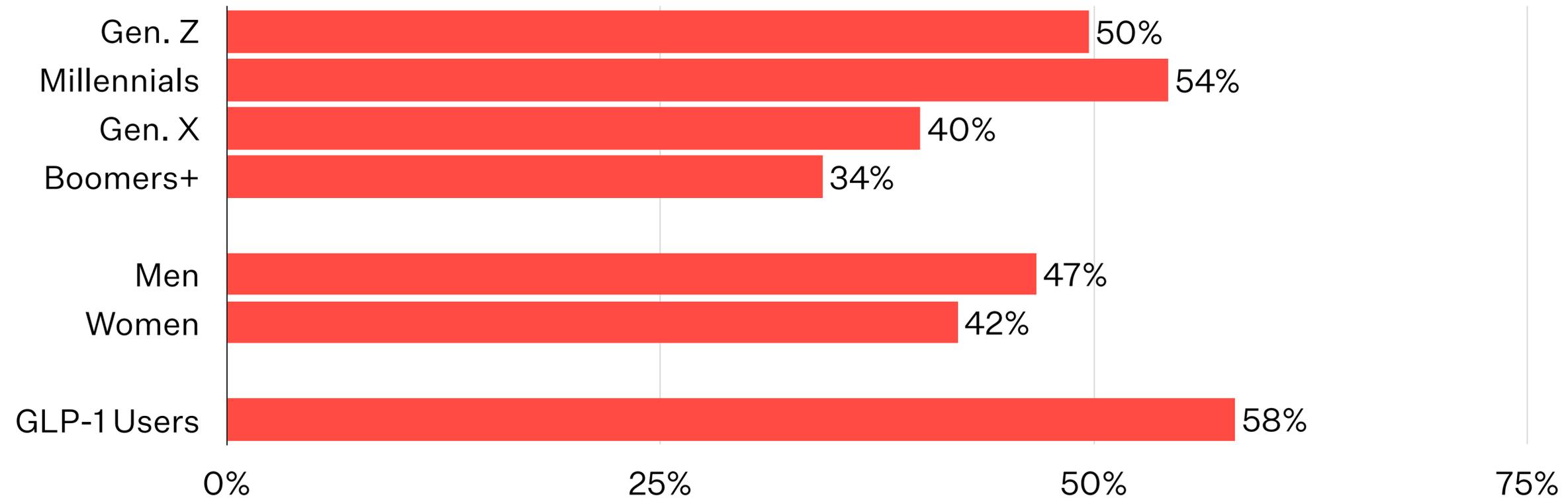
# Younger consumers are more likely to connect protein intake to better health

Percentage of responses: Overall, how much do you believe getting more protein actually improves people's health?



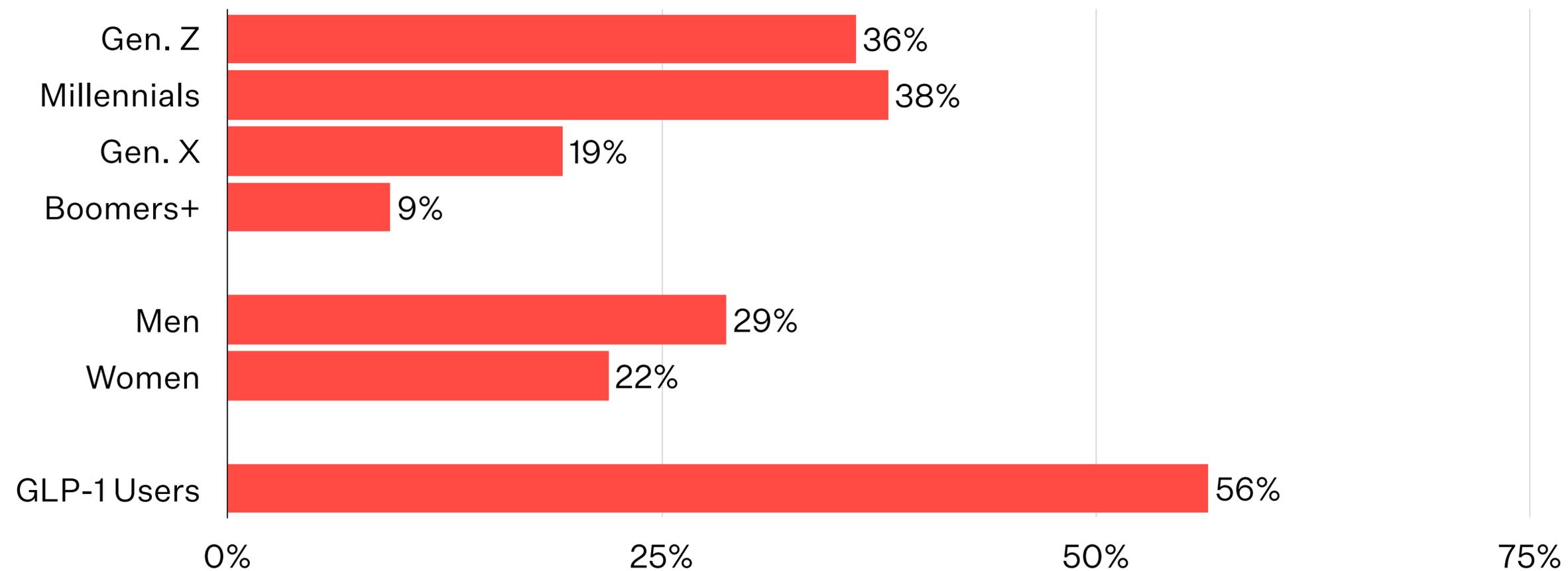
# 52% of Gen. Z and Millennials intentionally consume high-protein foods at least daily

Percentage of 'About once per day' or more: In a typical week, how often do you intentionally consume foods or drinks mainly because they are high in protein?



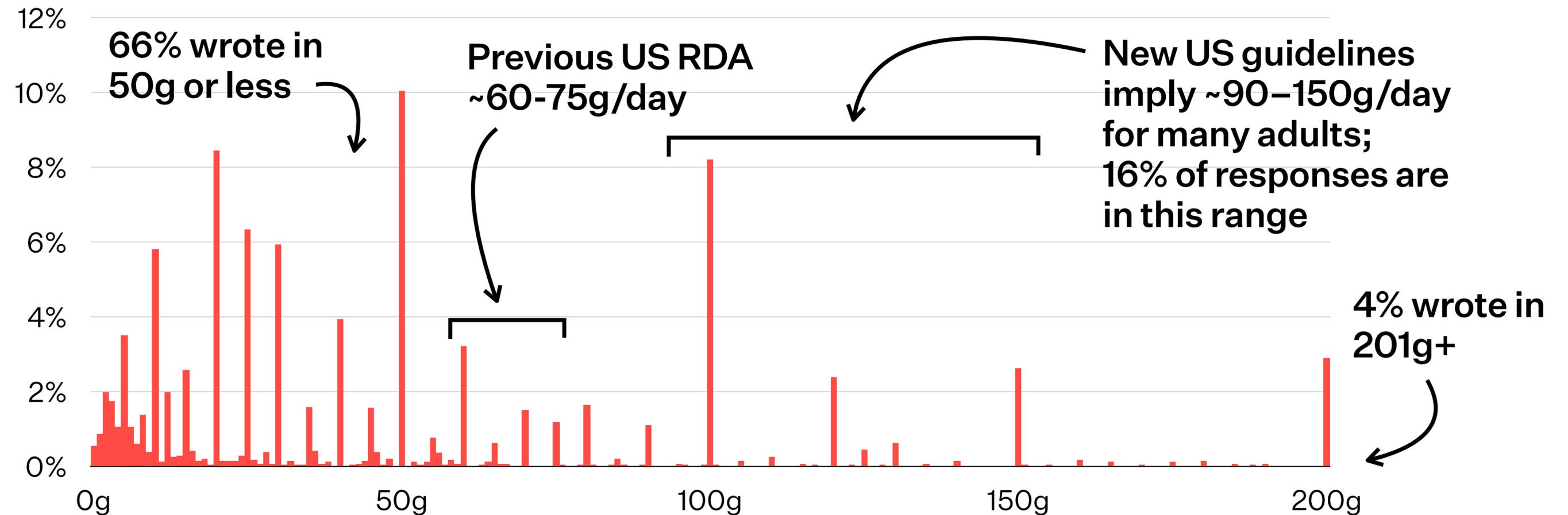
# Younger consumers and GLP-1 users are more likely to have specific protein goals

Percentage of 'Yes' responses: Do you have a specific number in mind for how much protein you aim to eat each day?



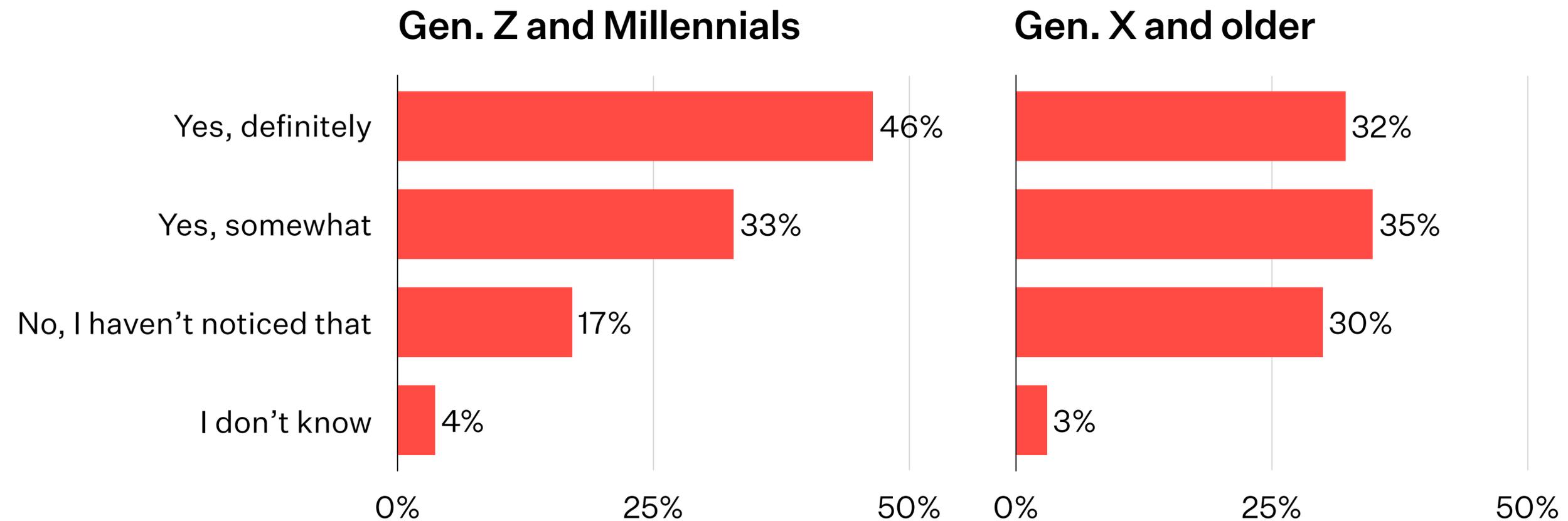
# Americans don't really know how much protein they're supposed to get

**Write-in responses: About how many grams of protein per day do you think a person like you should eat?**



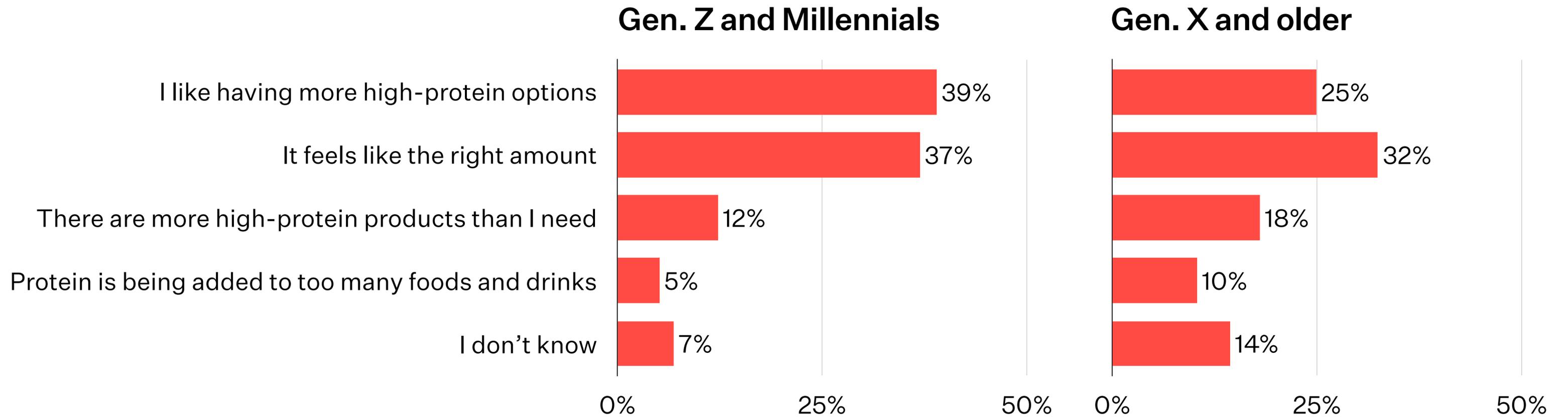
# Younger consumers have noticed protein mania at higher rates

Have you noticed brands adding protein to more foods or drinks or promoting their protein content more?



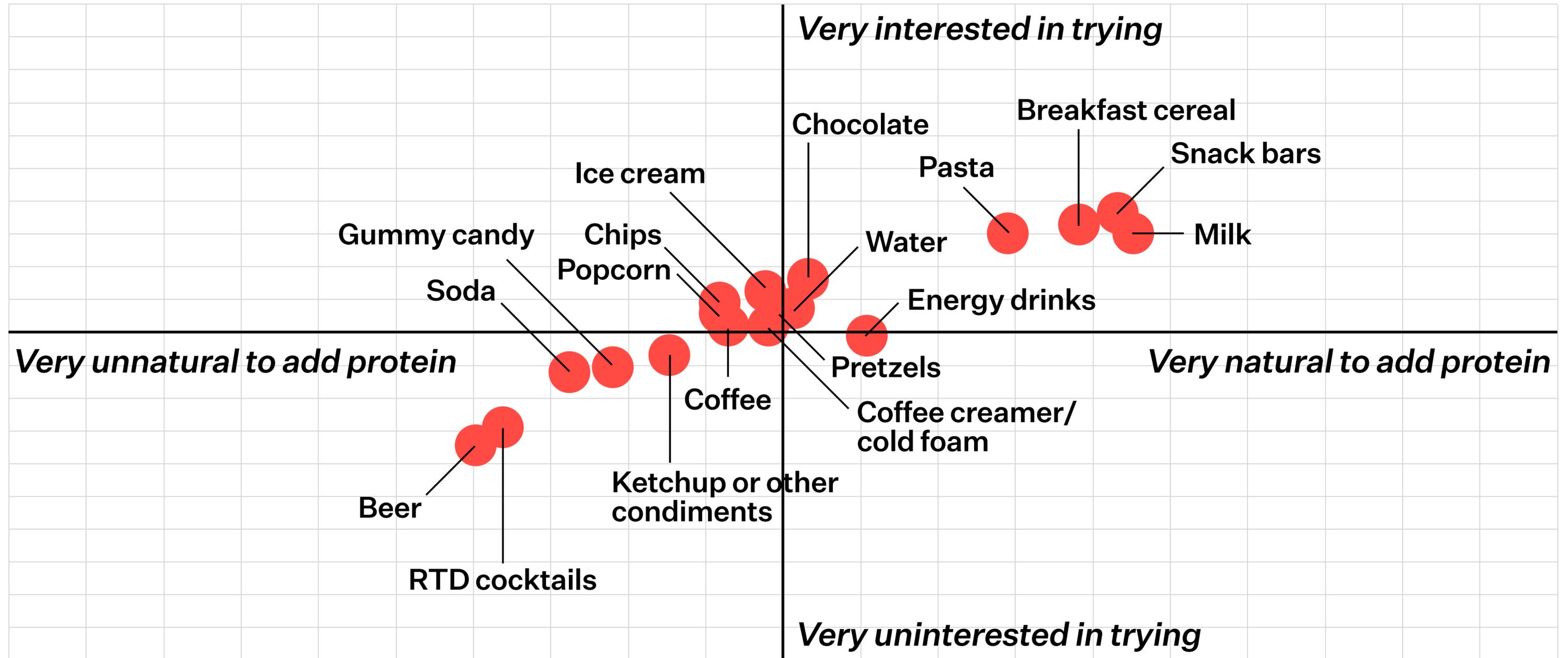
# Younger consumers are more excited to have high-protein options

Percentage of responses: How do you feel about the amount of high-protein foods and drinks on the market today?

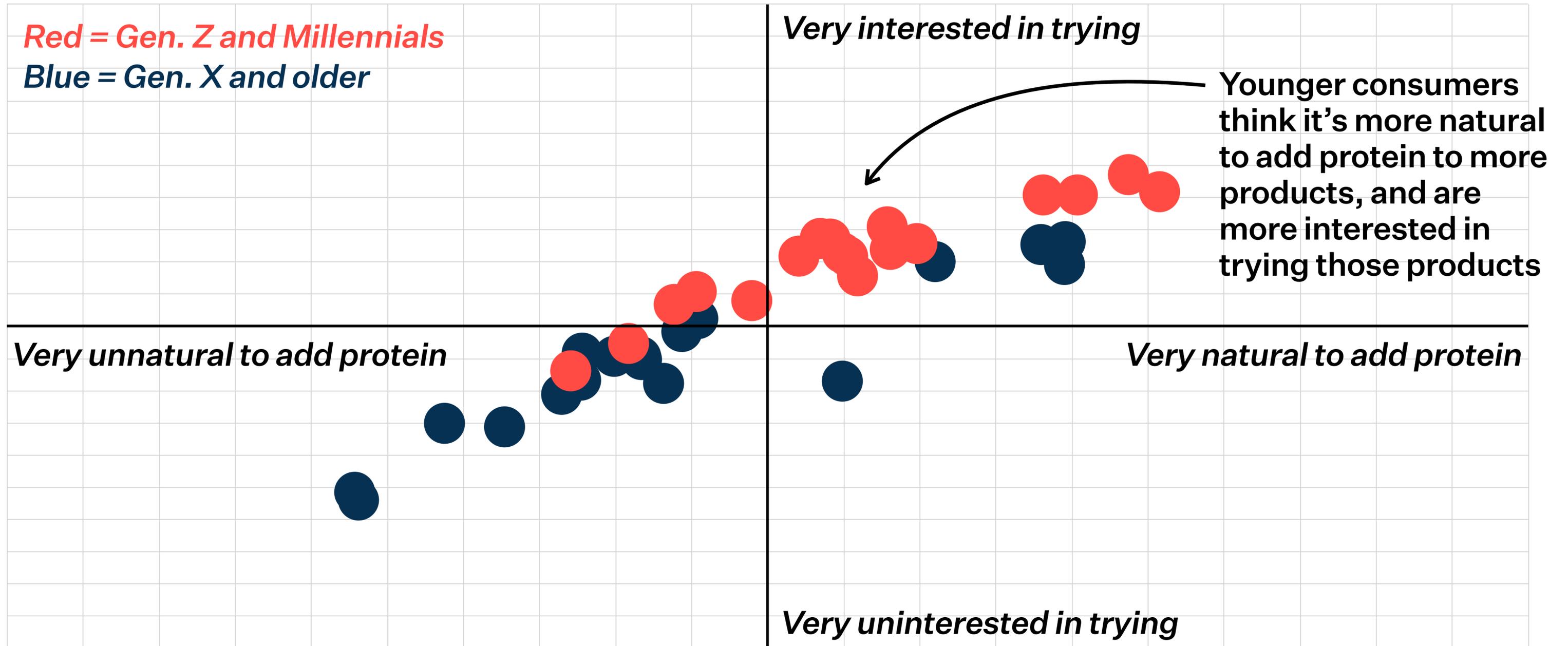


We asked our **Consumer Trends Survey** panel of 3,000 Americans to rate 18 food and beverage items on **how natural it feels to add protein to them,** and **how interested they are in trying a high-protein version** of each product.

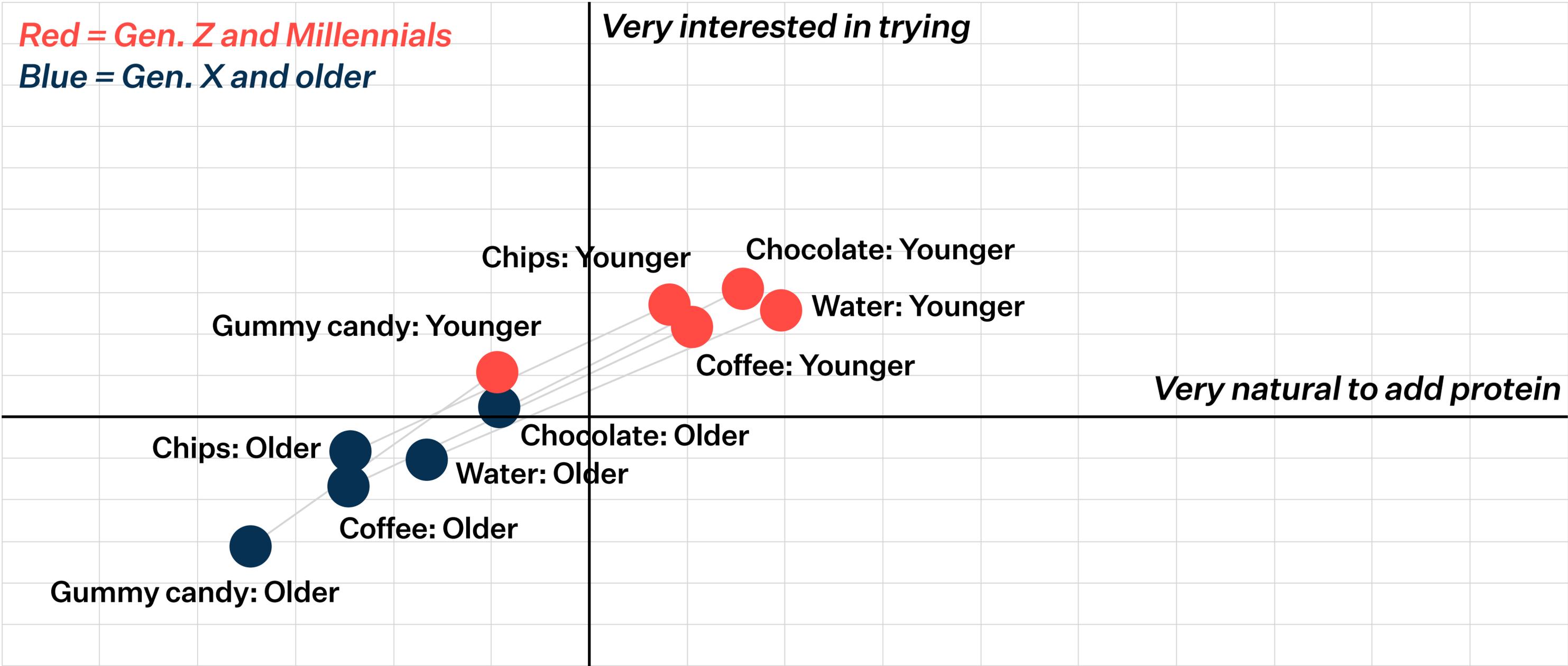
# The Consumer Trends 2026 Protein Feelings Matrix



# Protein Feelings: Gen. Z & Millennials vs. older

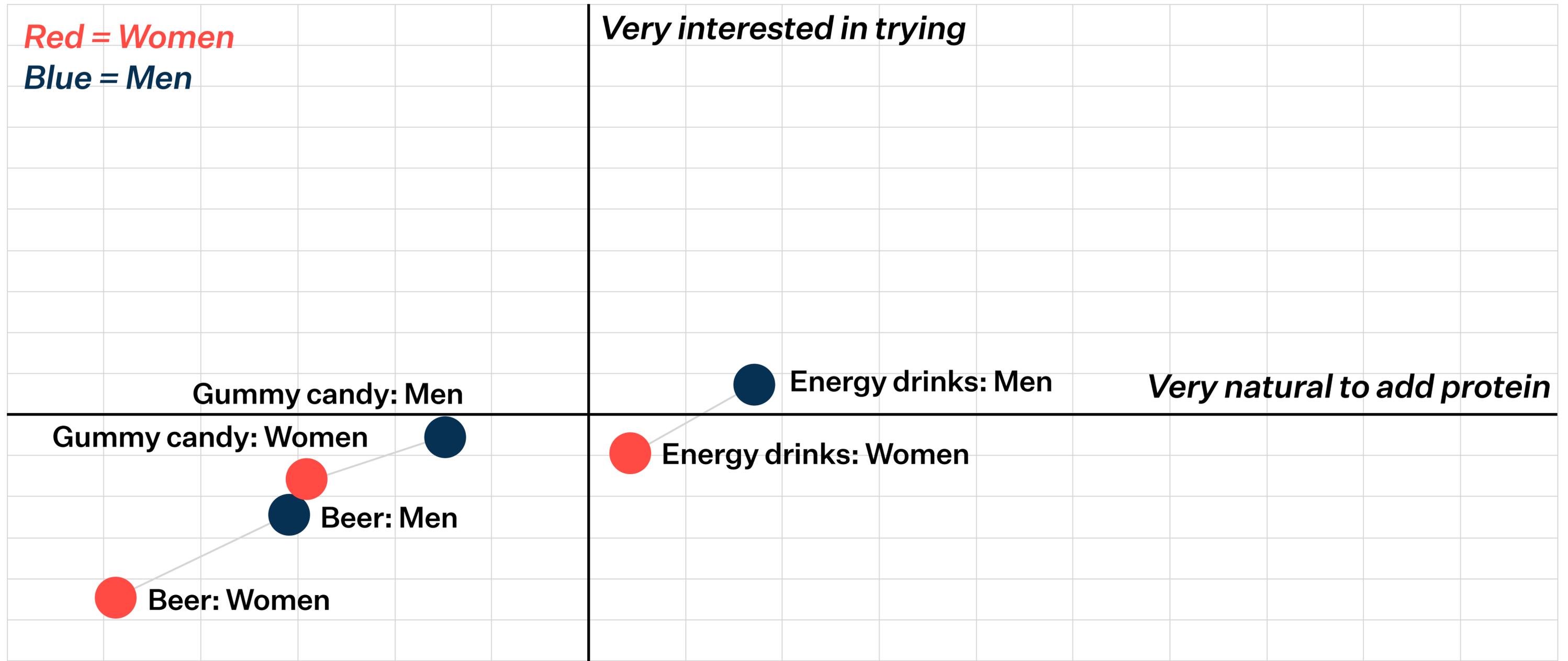


# Protein Feelings: Gen. Z & Millennials vs. older

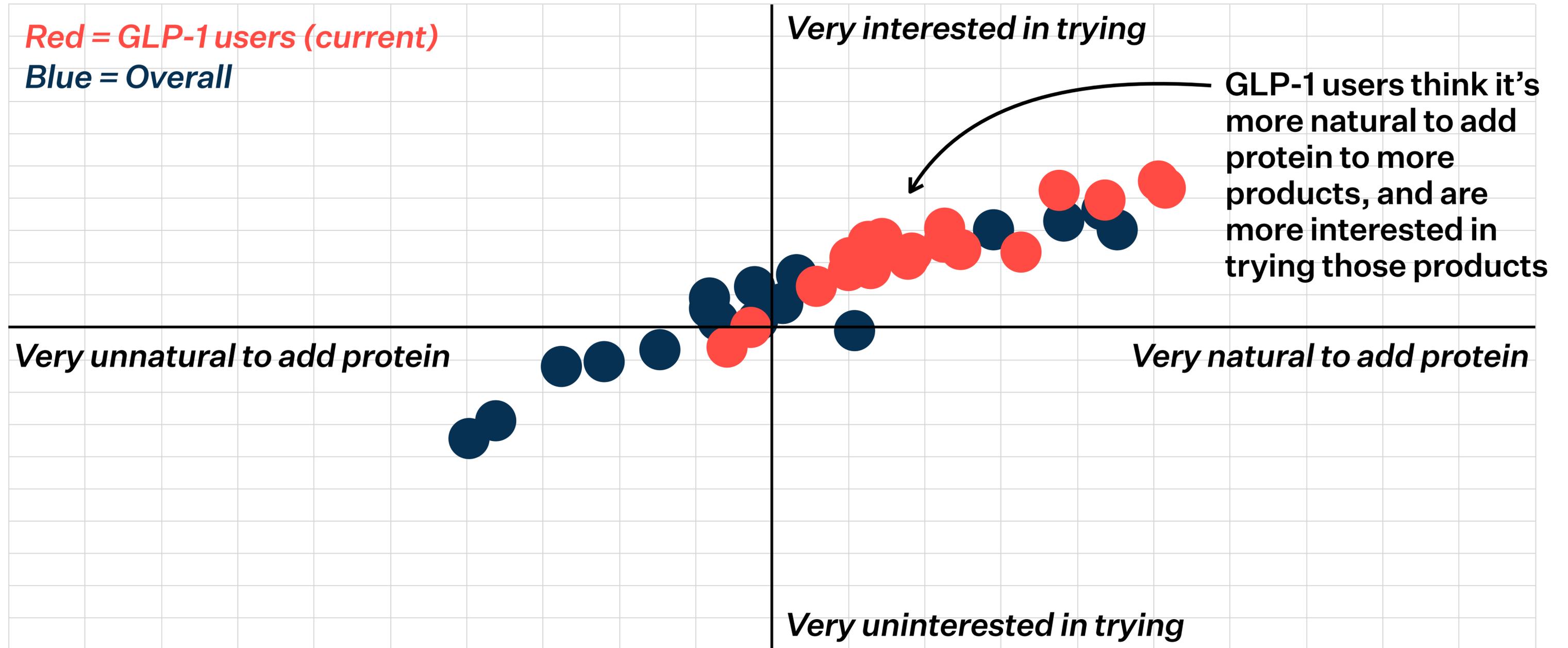


Data: The New Consumer and Coefficient Capital Consumer Trends Survey, powered by \*toluna (n=1461, 1539)  
 Excludes "I don't know" responses.

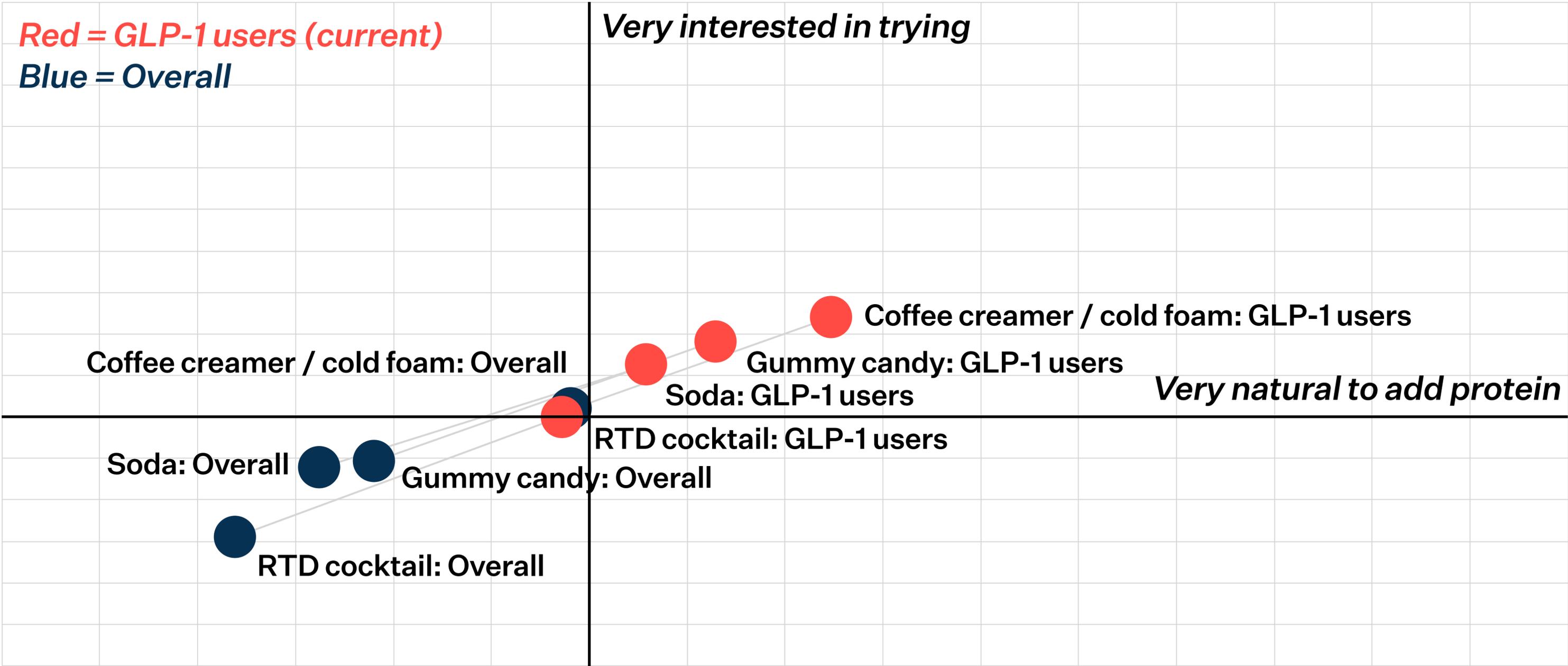
# Protein Feelings: Women vs. Men



# Protein Feelings: GLP-1 users

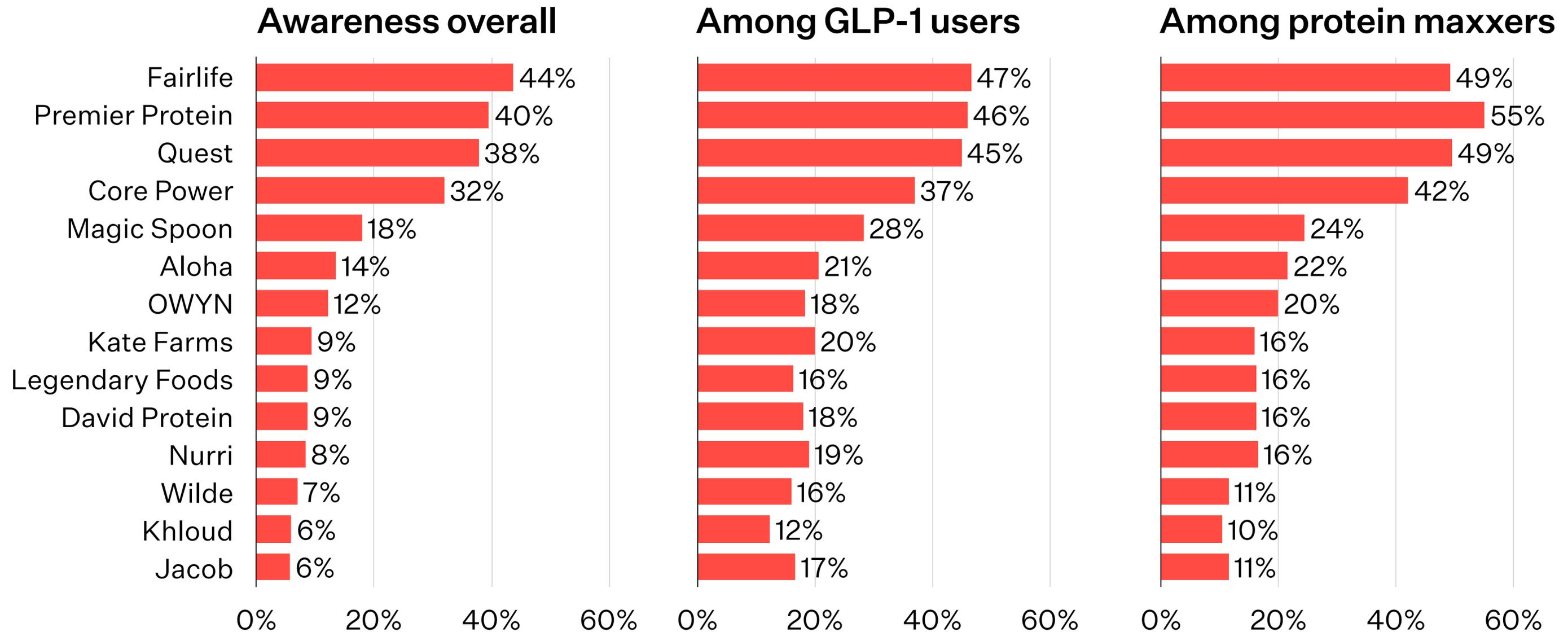


# Protein Feelings: GLP-1 users



Data: The New Consumer and Coefficient Capital Consumer Trends Survey, powered by \*toluna (n=3000, 244)  
Excludes "I don't know" responses. GLP-1 sample excludes inattentive respondents.

# Protein maxxers and GLP-1 users are more aware of emerging protein brands

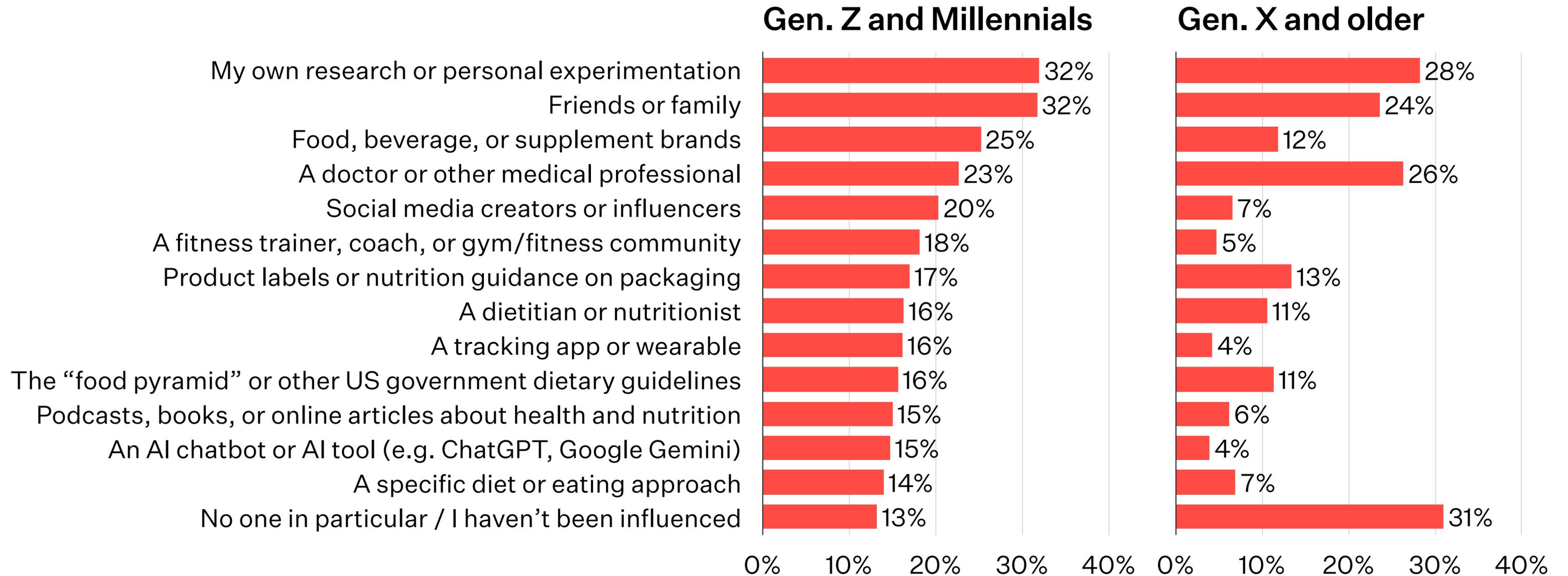


Data: The New Consumer and Coefficient Capital Consumer Trends Survey, powered by \*toluna (n=3000)

“Protein maxxers” say they intentionally consume food/drinks because they are high in protein multiple times per day (n=663)

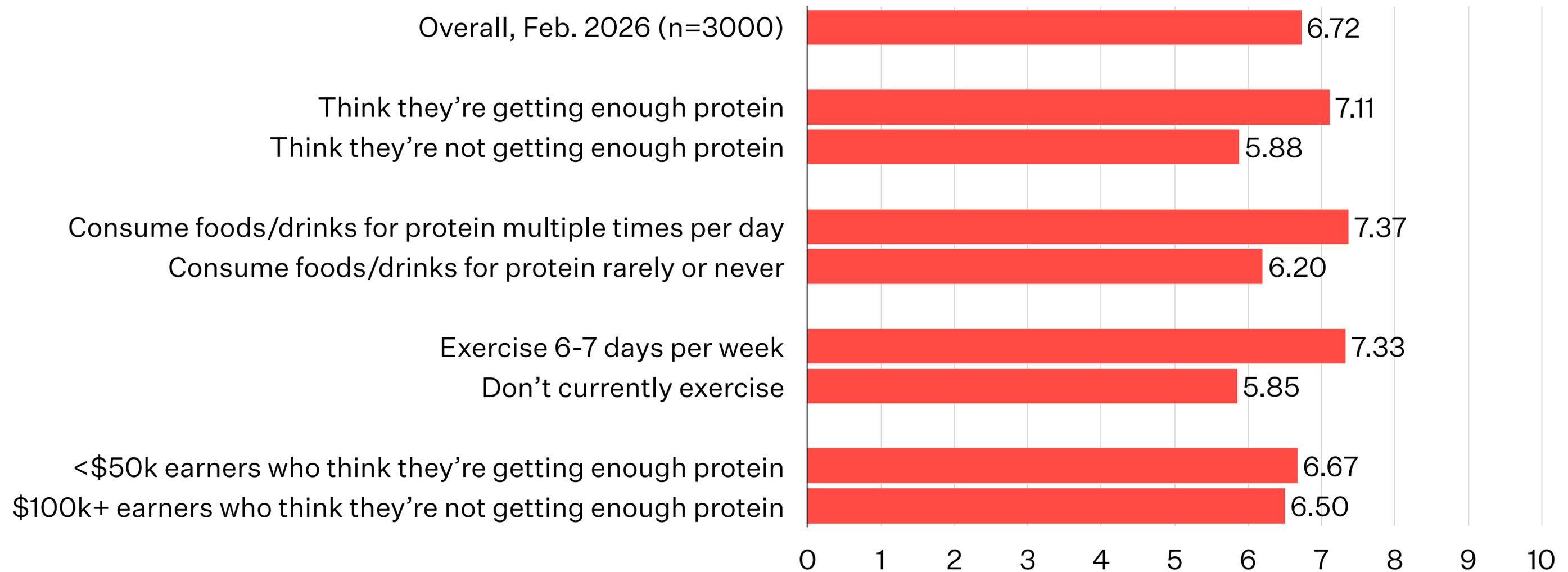
# What's influencing protein consumption?

## Some sources are generational — not all



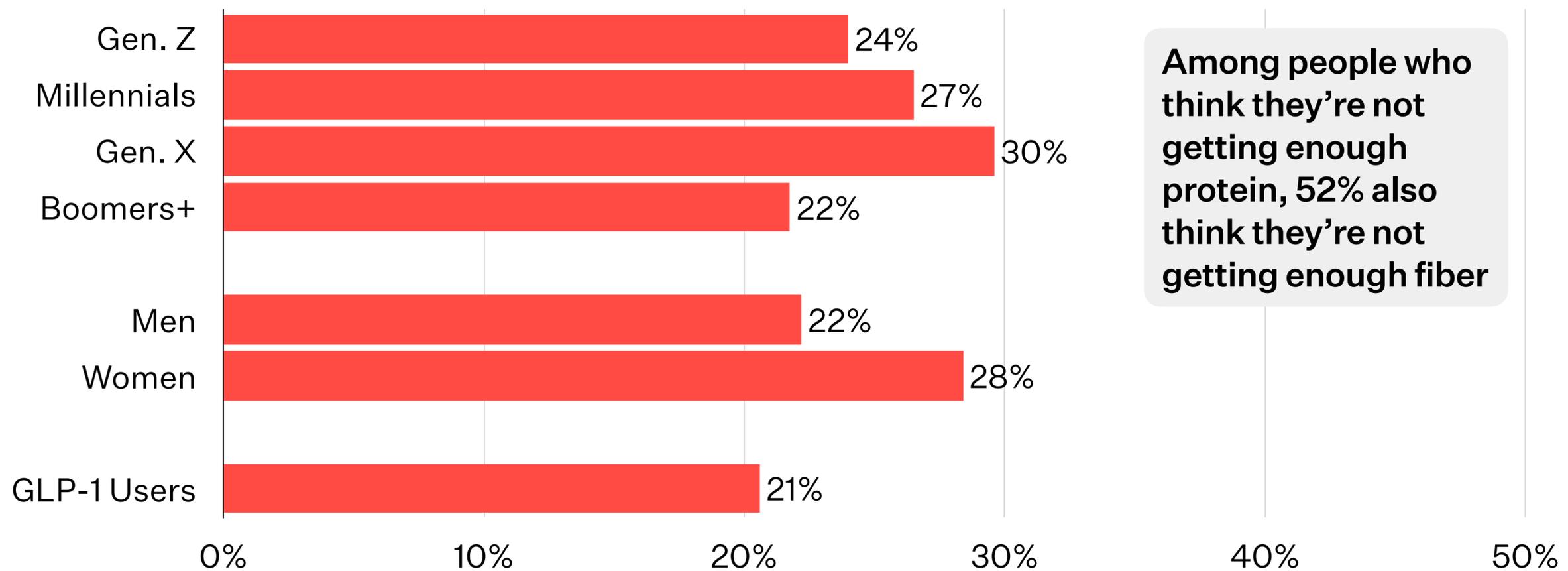
# Does protein make you happier? Well...

**Mean 'Life Satisfaction' Score: On a scale from zero to ten, how satisfied are you with life as a whole these days?**



# A quarter of Americans also think they're not consuming enough fiber

Percentage of 'No' responses: Do you feel like you're getting enough fiber in your diet?

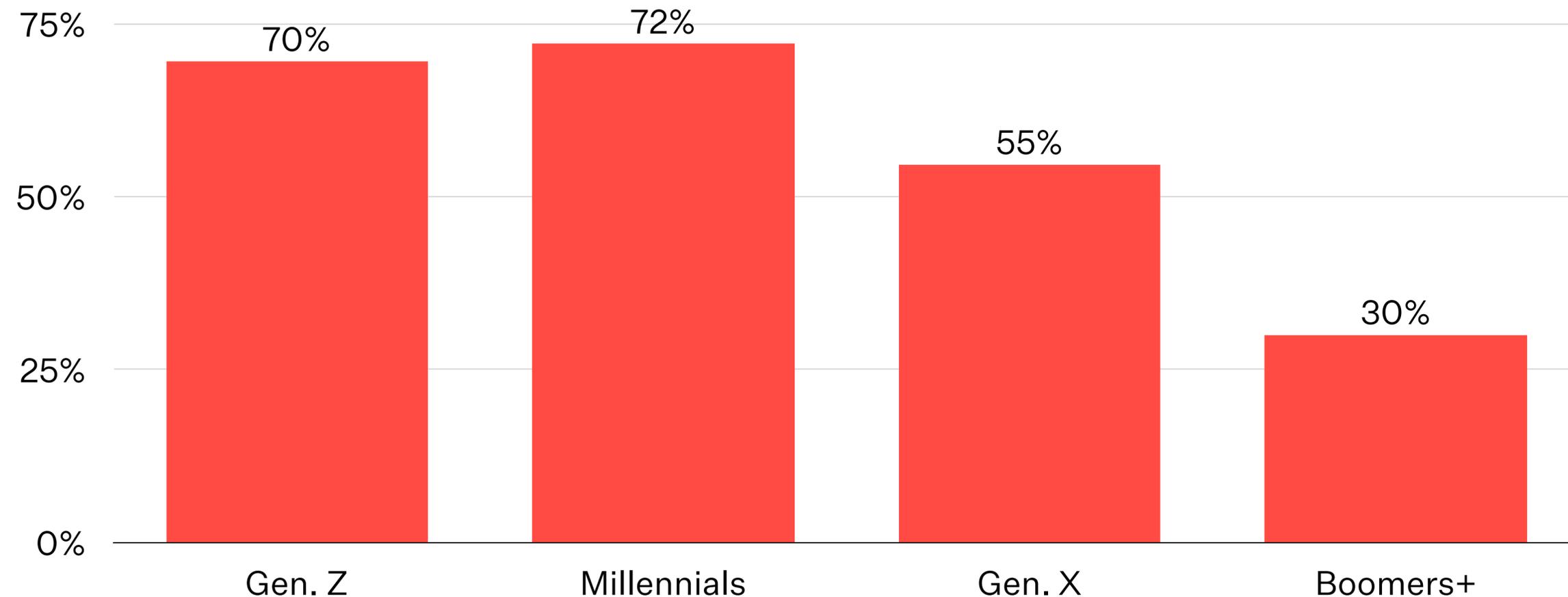


3

Younger consumers don't just  
drink differently — they  
identify through beverages.

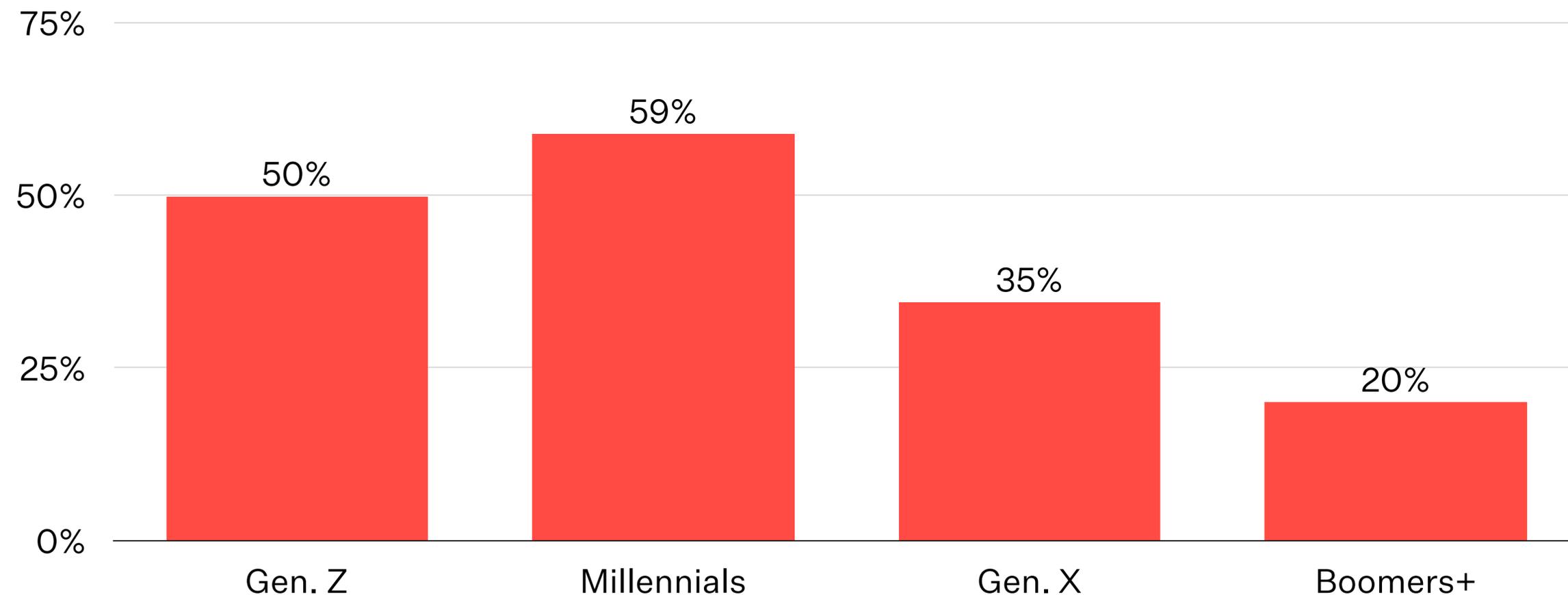
# 71% of Gen. Z and Millennials say they 'love' trying different beverages

Percentage of 'I love...' responses: How much would you say you love trying and drinking different beverages?



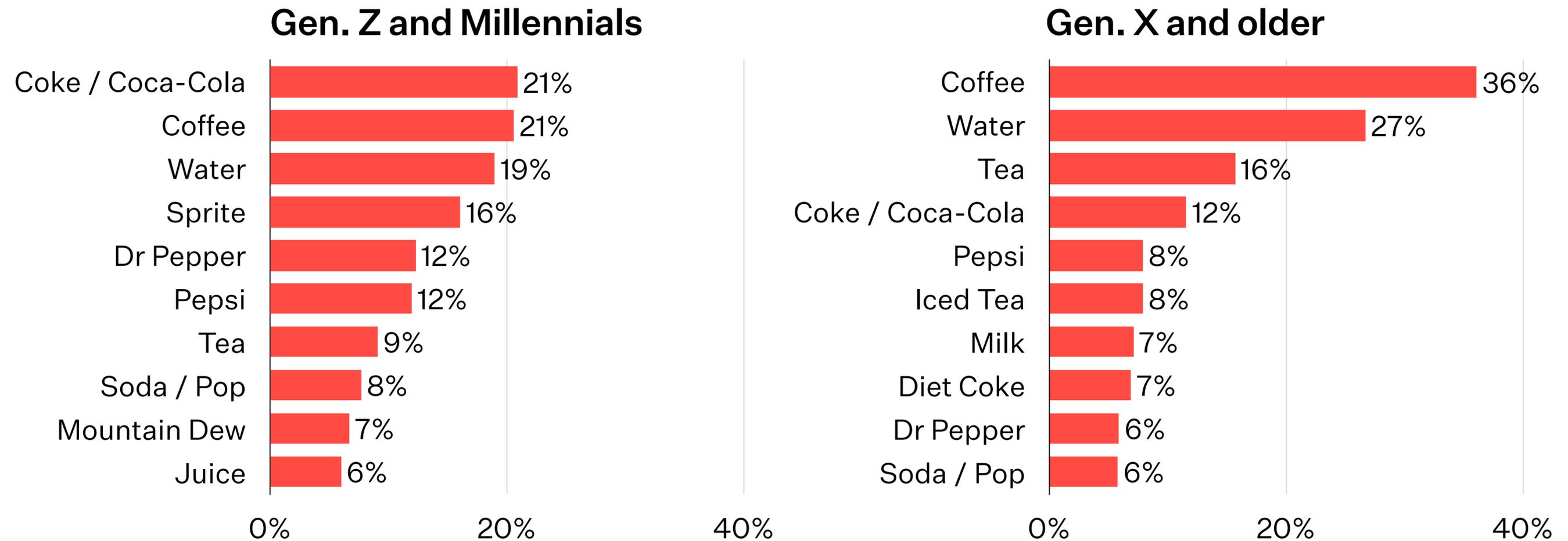
# 55% of Gen. Z and Millennials say beverages are part of their personality

Percentage of 'Very much' and 'Somewhat' responses: My favorite beverages are part of how I express my personality...



# We asked 3,000 Americans to list their three favorite beverages

Percentage of respondents writing in each specific beverage



# Instacart's top-growing beverages include protein, prebiotics, and energy

Top 10 beverage categories by absolute and relative increase in item share, US Instacart baskets in 2025

| Top-growing: Absolute increase in item share |                                | Fast-growing: Relative increase in item share |                        |
|--|--------------------------------|---|------------------------|
| 1  | Spring water                   | 1   | Variety pack soda      |
| 2  | Protein drinks                 | 2   | Tapioca pearls         |
| 3  | Probiotic and prebiotic drinks | 3   | Slushie drinks         |
| 4  | Energy drinks                  | 4   | Matcha powder          |
| 5  | Coconut water                  | 5   | Powdered energy drinks |
| 6  | Distilled water                | 6   | Bottled oolong tea     |
| 7  | Juice shots                    | 7   | Other juice            |
| 8  | Other soda                     | 8   | Blueberry juice        |
| 9  | Fruit flavored soda            | 9   | Energy shots           |
| 10   | Instant coffee                 | 10  | Aloe vera juice        |

# For younger consumers, beverage is an emotional journey

“Trying new beverages is a fun part of my routine”

Agree:

59%

Gen. Z and Millennials

32%

Gen. X and Older

“I sometimes buy a beverage because the packaging/branding catches my eye”

Agree:

61%

Gen. Z and Millennials

30%

Gen. X and Older

“I often choose beverages based on how they make me feel — energy, calm, focus, etc.”

Agree:

70%

Gen. Z and Millennials

48%

Gen. X and Older

“I’m willing to pay more for a beverage that feels special or premium”

Agree:

62%

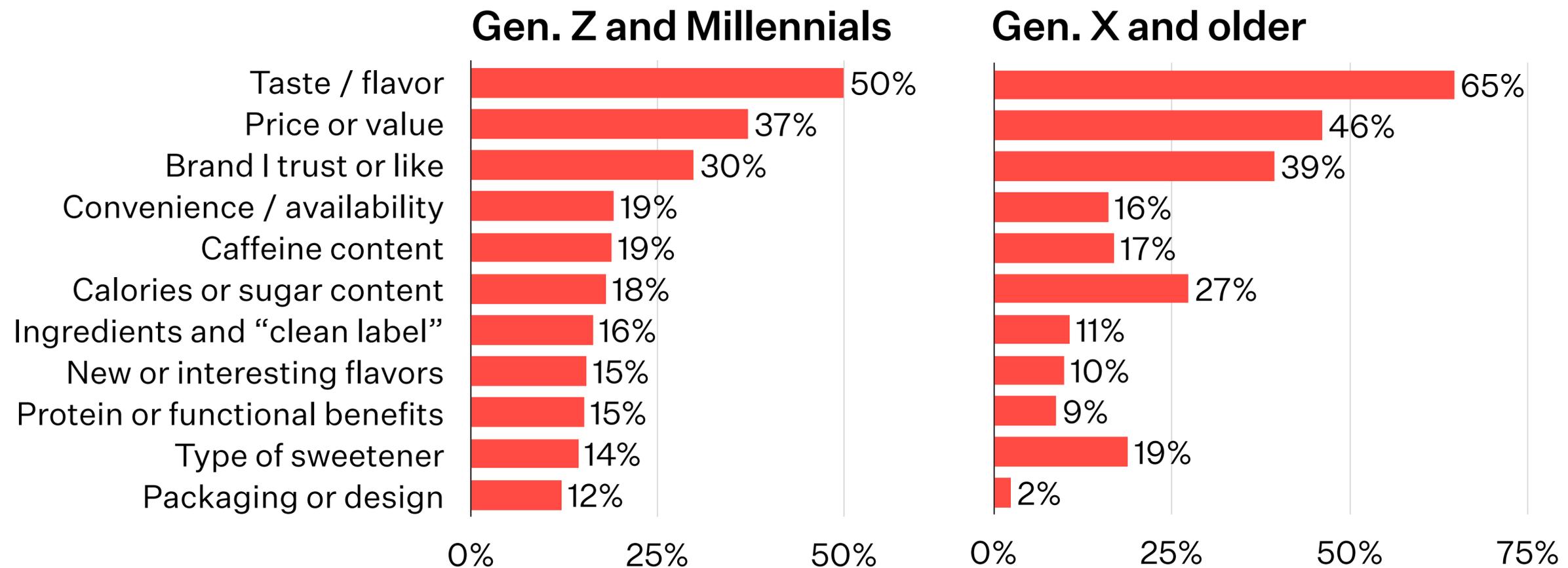
Gen. Z and Millennials

41%

Gen. X and Older

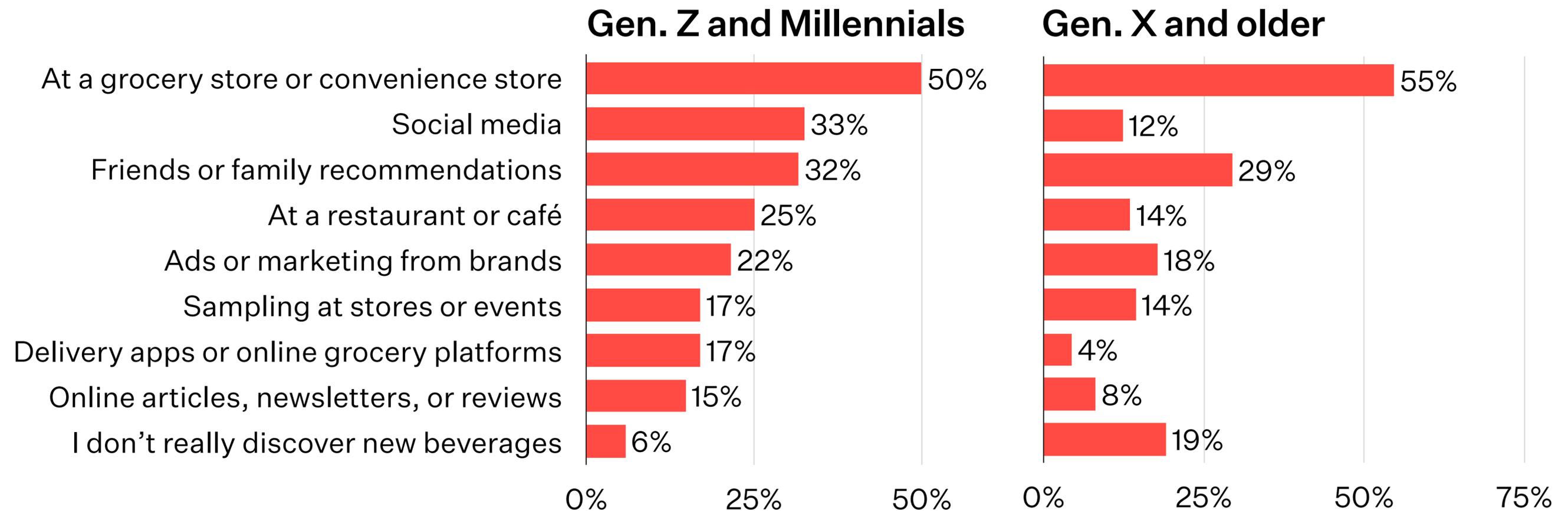
# Younger beverage shoppers look beyond taste, price, and brand

Percentage of responses: When choosing a beverage to buy or drink, which of the following matter most to you?



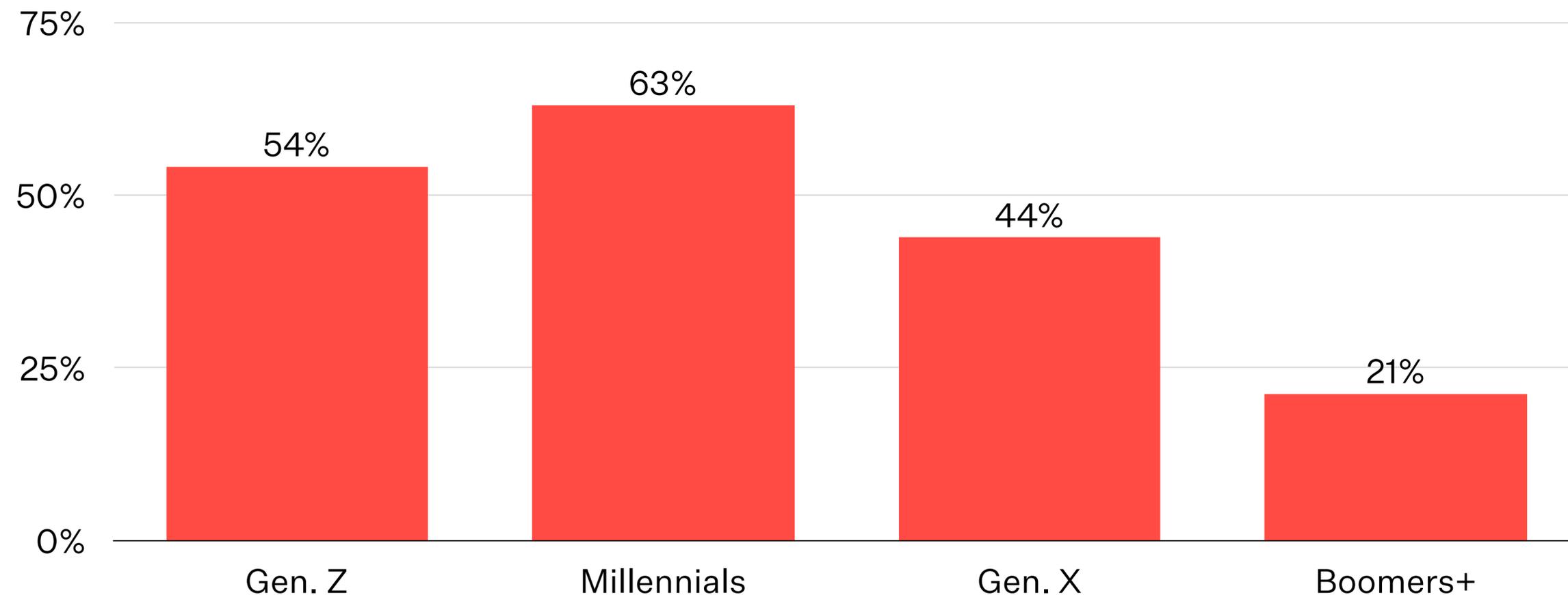
# Retail still leads, but younger consumers also discover new beverages online

Percentage of responses: Where do you most often discover new beverage brands or products?



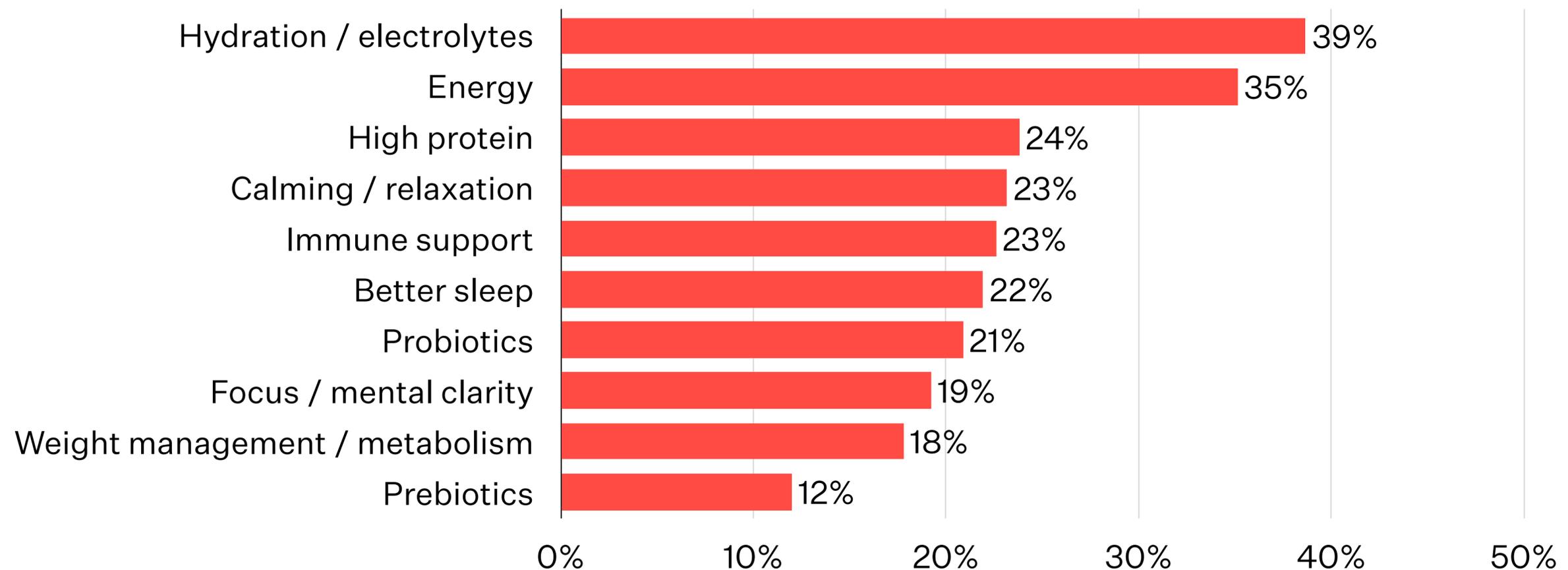
# ‘Functional’ beverages appeal more to younger consumers, especially Millennials

‘Extremely’ and ‘Very’ responses: How interested are you in consuming beverages with ‘functional’ benefits?



# Consumers want a wide range of benefits from beverages

Percentage of responses: Which, if any, of the following benefits would you be most interested in getting from a beverage?



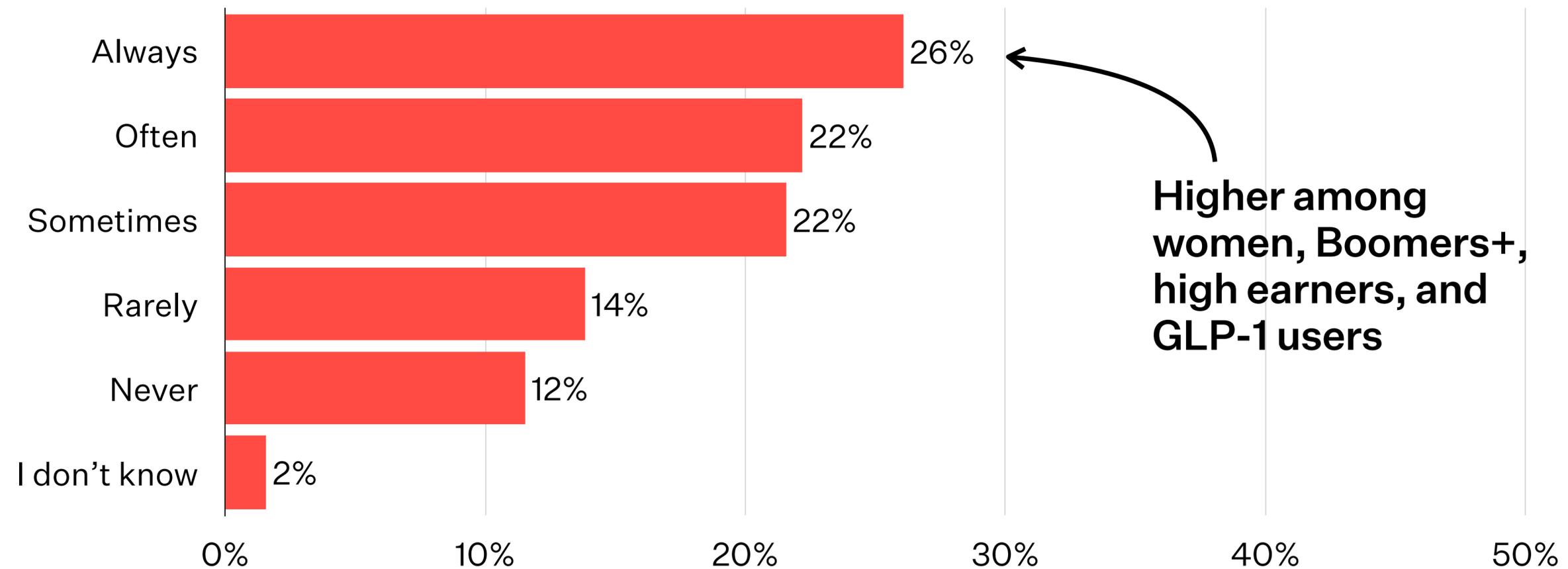
# What are early-adopter beverage consumers now buying on Instacart?

Top Instacart beverage categories by relative difference in item share: Beverage ‘early adopters’ vs. everyone else

|   |                                |    |                    |
|---|--------------------------------|----|--------------------|
| 1 | CBD drinks                     | 6  | Leaf yerba mate    |
| 2 | Bottled oolong tea             | 7  | Other juice        |
| 3 | Red tea                        | 8  | Bottled herbal tea |
| 4 | Probiotic and prebiotic drinks | 9  | Coffee substitutes |
| 5 | Bottled yerba mate             | 10 | Pressed juices     |

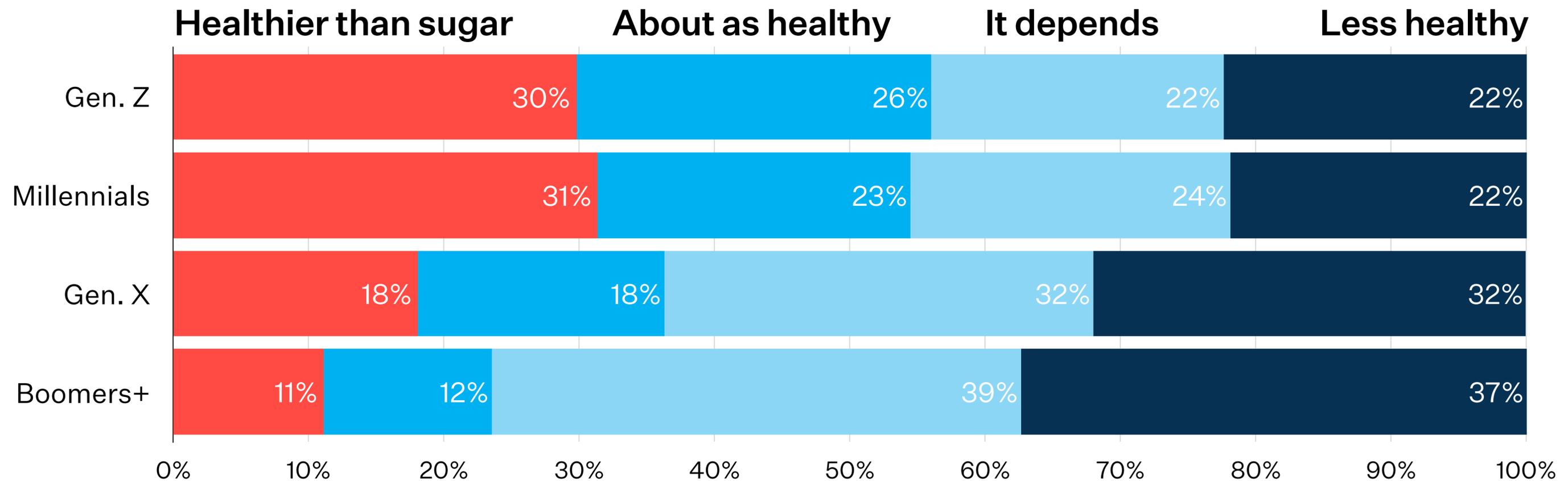
# Nearly half of consumers check labels for sugar or sweeteners 'Often' or 'Always'

Percentage of responses: When buying packaged beverages, how often do you check the label for sugar or sweeteners?



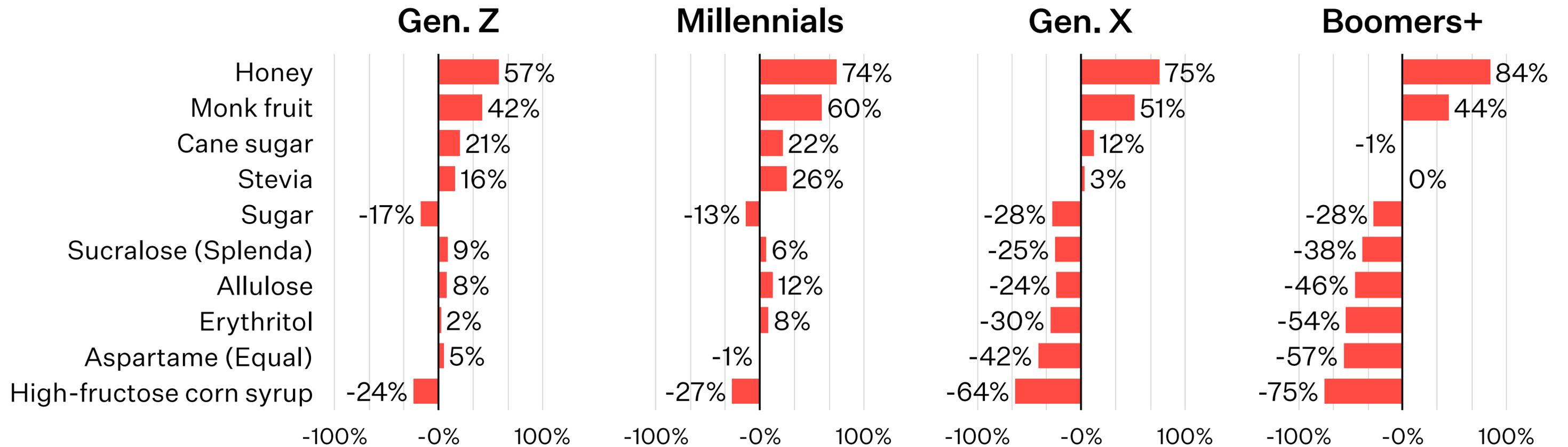
# Younger consumers are more likely to trust alternative sweeteners

In general, compared to sugar, do you think non-sugar sweeteners used in foods and drinks are...



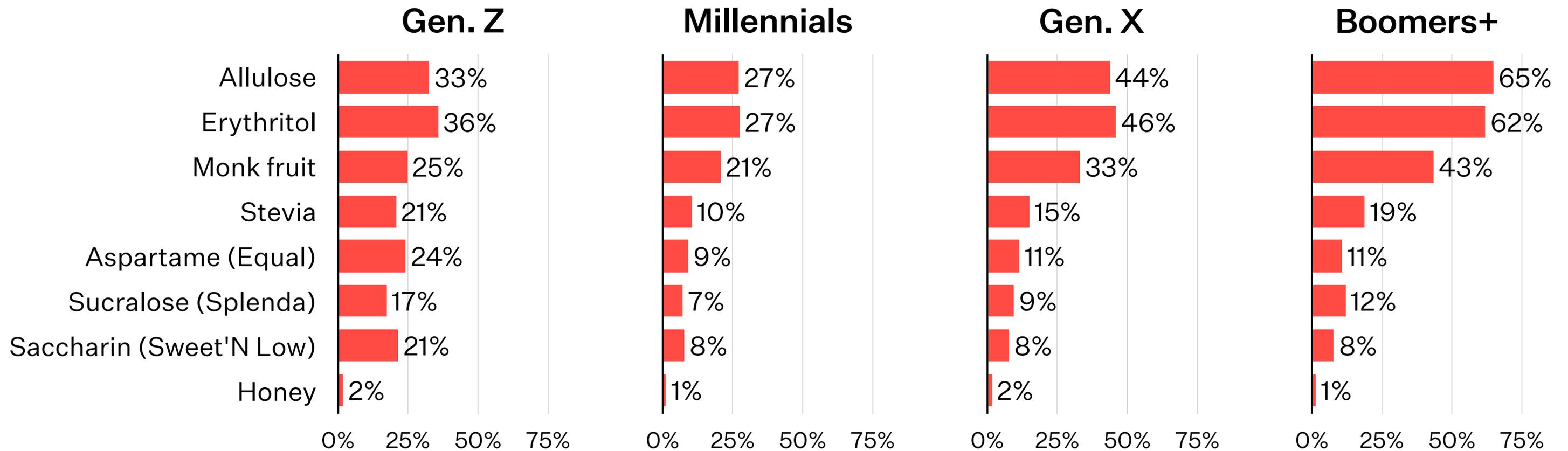
# Younger consumers rate almost every sweetener as healthier

Net healthiness differential: For each of the following sweeteners, how healthy or unhealthy do you consider it?



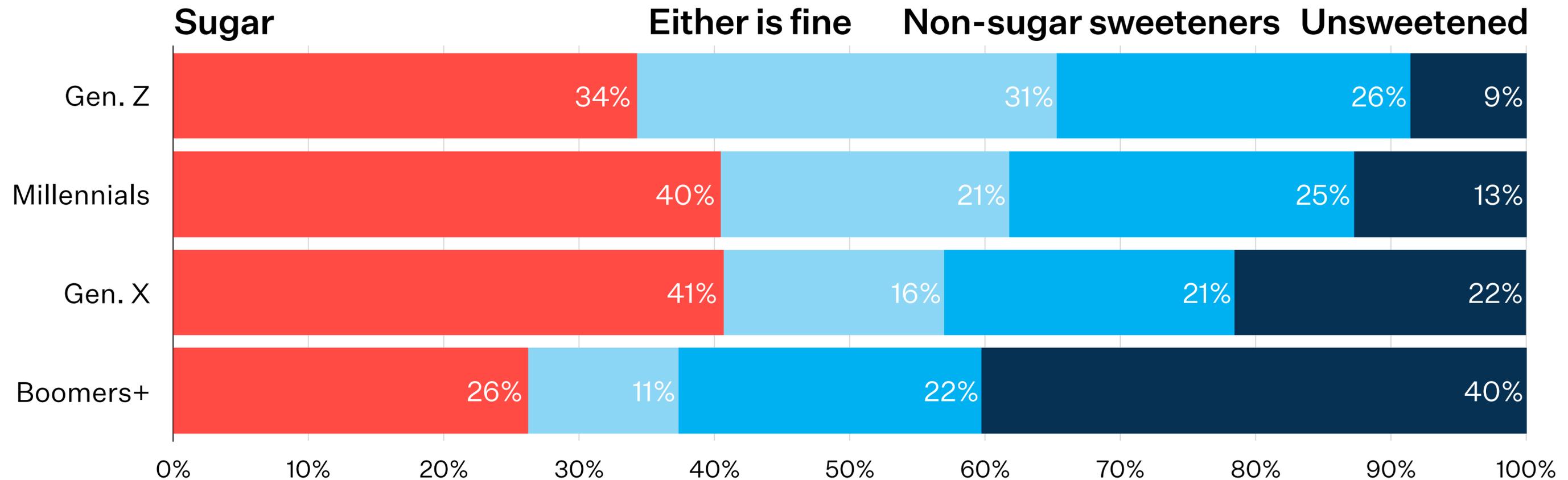
# Older consumers are less familiar with the newest alternative sweeteners

Percentage of respondents by generation: 'Not familiar enough' to rate each sweetener's healthiness



# Younger consumers are totally fine with non-sugar-sweetened beverages

When choosing a beverage like soda, flavored water, or ready-to-drink tea, which do you generally prefer?

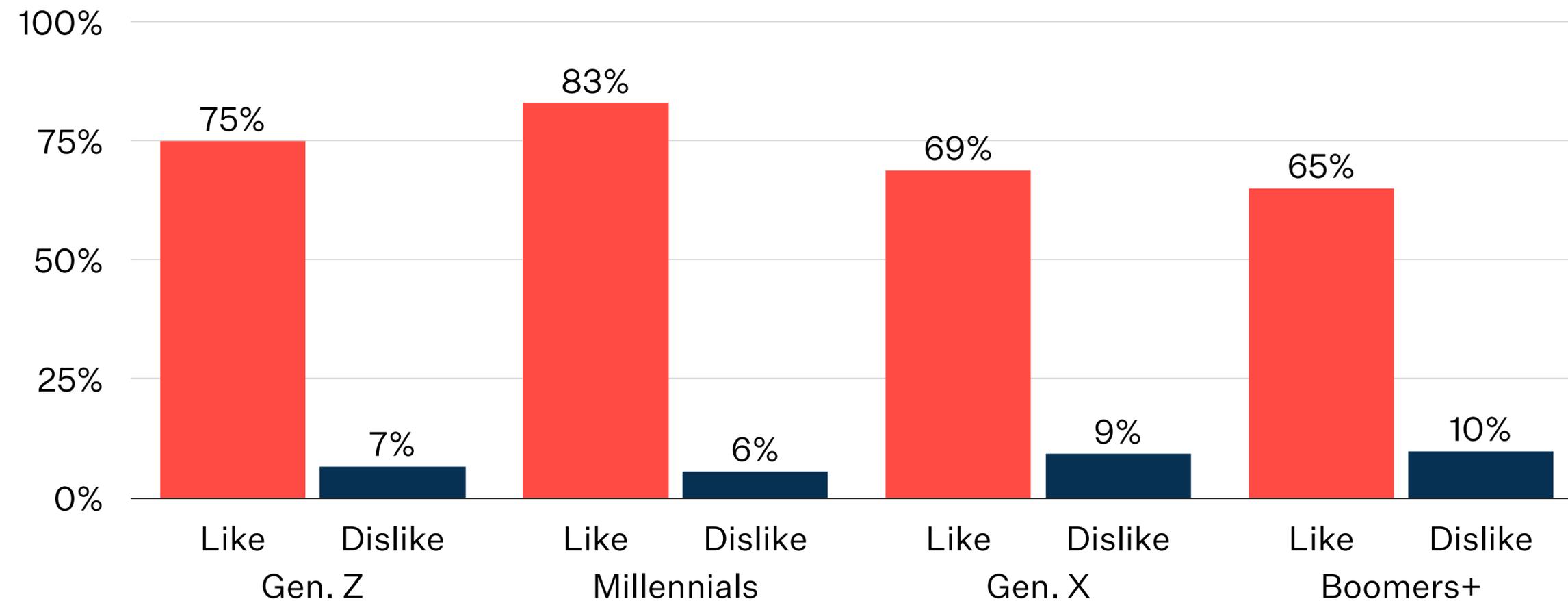


4

Online grocery shopping is  
experiencing another  
inflection point in growth.

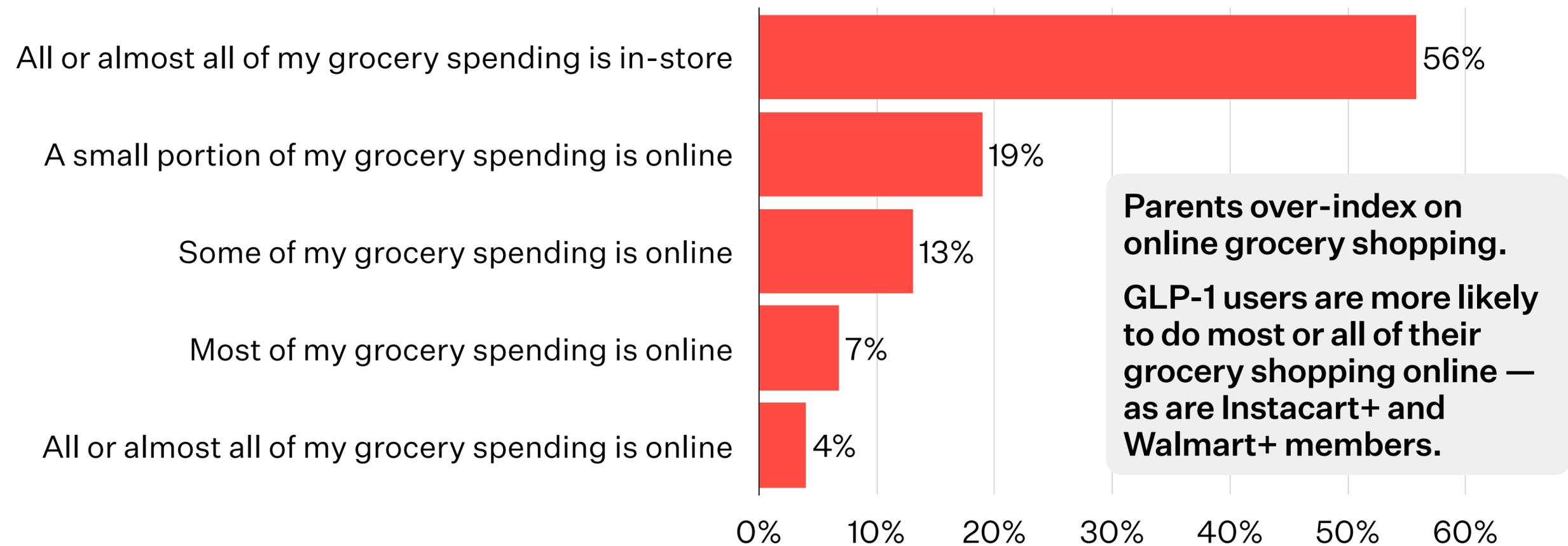
# Most people actually like shopping for groceries

Percentage of 'Like' and 'Dislike' responses: How much do you like shopping for groceries?



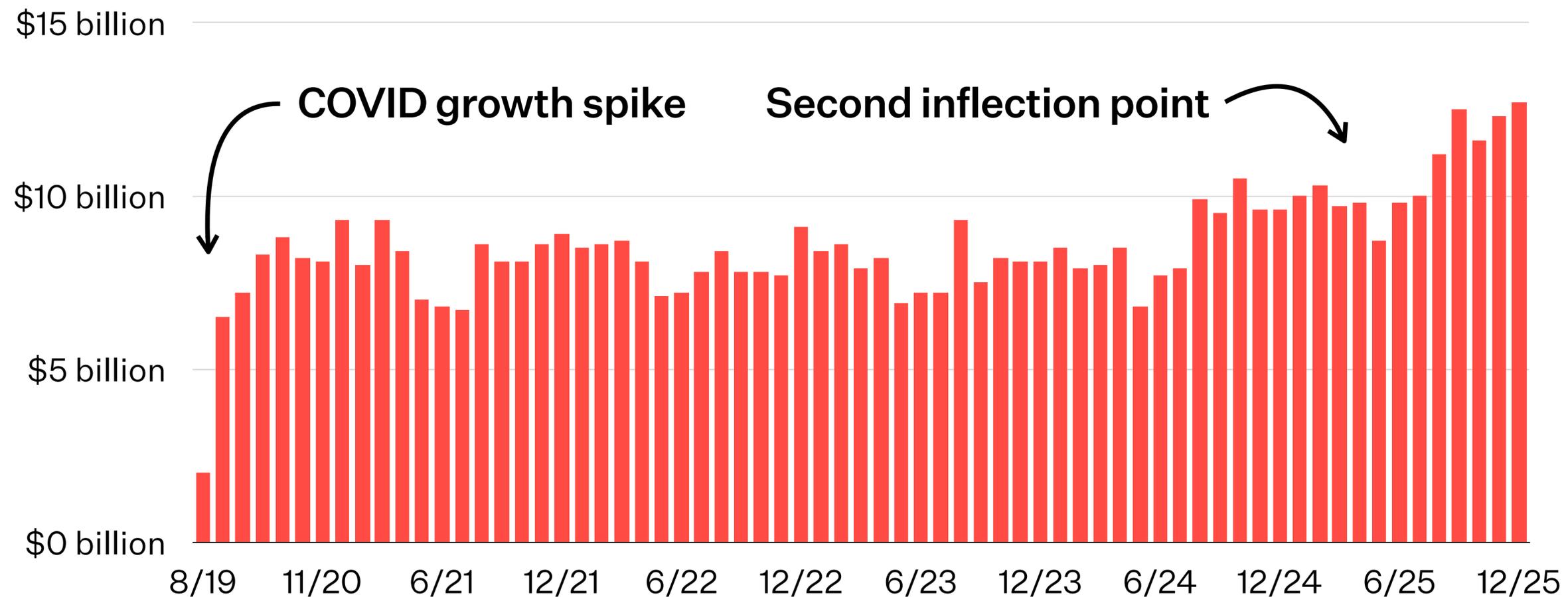
# Most Americans still do most of their grocery shopping in physical retail stores

Thinking about a typical month, how much of your total grocery spending happens online versus in-store?



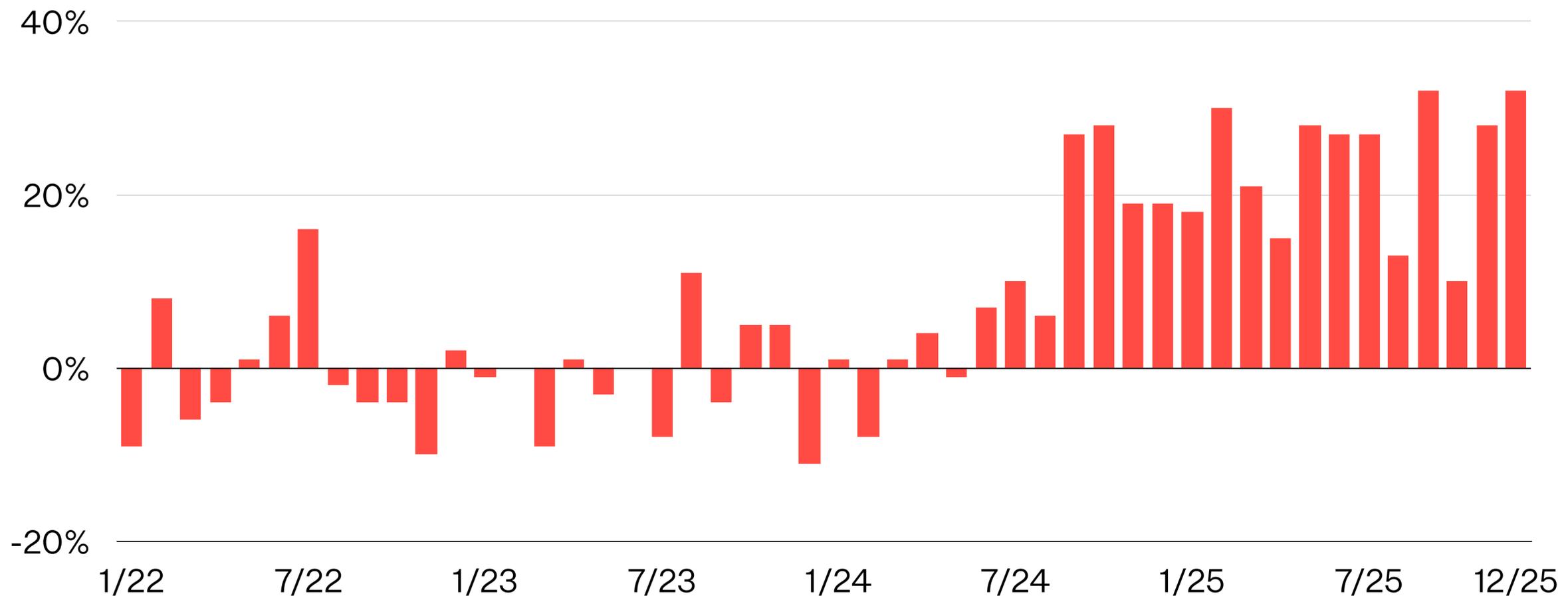
# US online grocery spending passed \$128 billion in 2025, up 23% from 2024

## Monthly US online grocery sales — Brick Meets Click grocery shopping survey



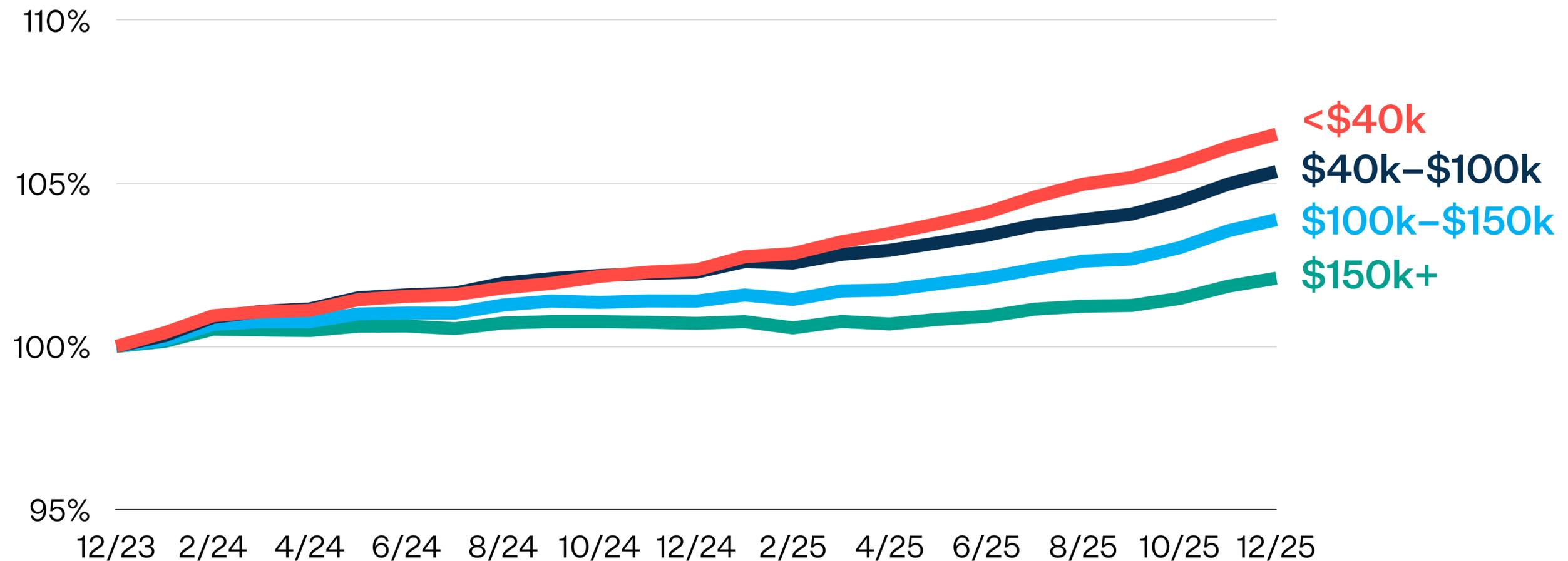
# Online grocery growth accelerated in 2025 after years of treading water

Year over year change in monthly US online grocery sales — Brick Meets Click grocery shopping survey



# Online grocery spending is growing across all incomes, led by lower earners

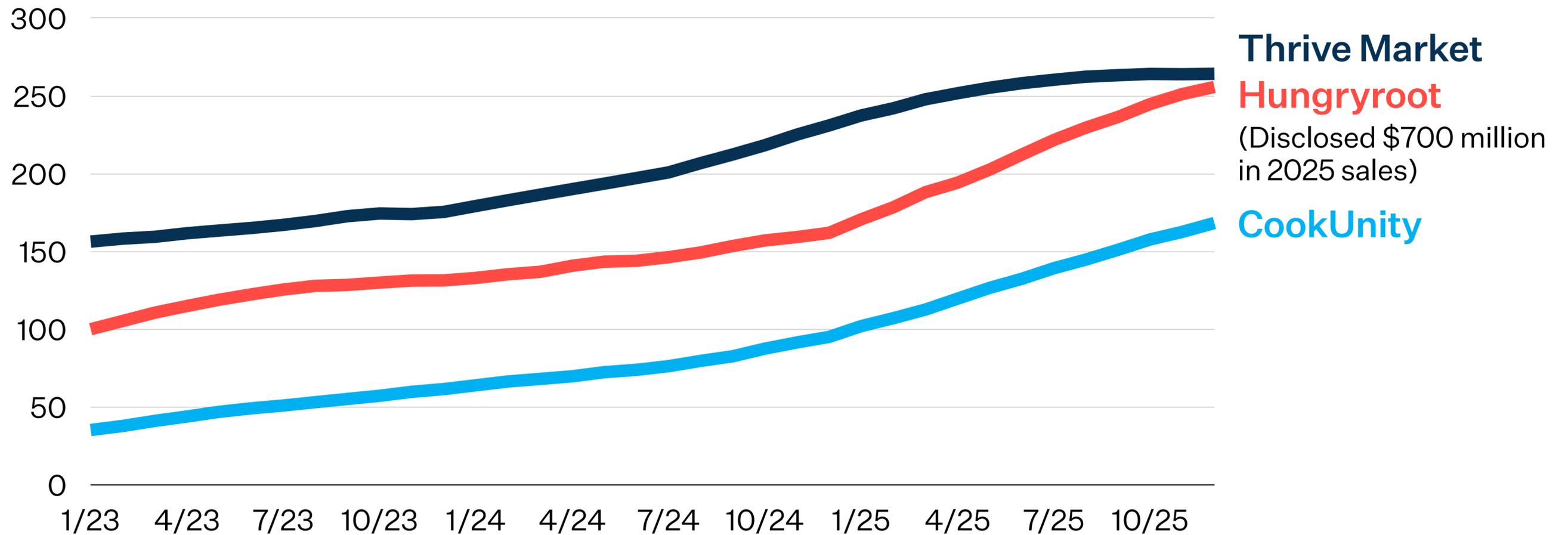
## Indexed US online grocery spending growth by income segment — Consumer Edge



Data: Consumer Edge card transaction data. US only. Trailing 12 months, indexed to 100 in Dec. 2023. Reflects online spending among a subset of grocers. Does not include Walmart, Target, Costco, Amazon, and other superstores or clubs.

# The shift to digital is driving billions to new grocery models

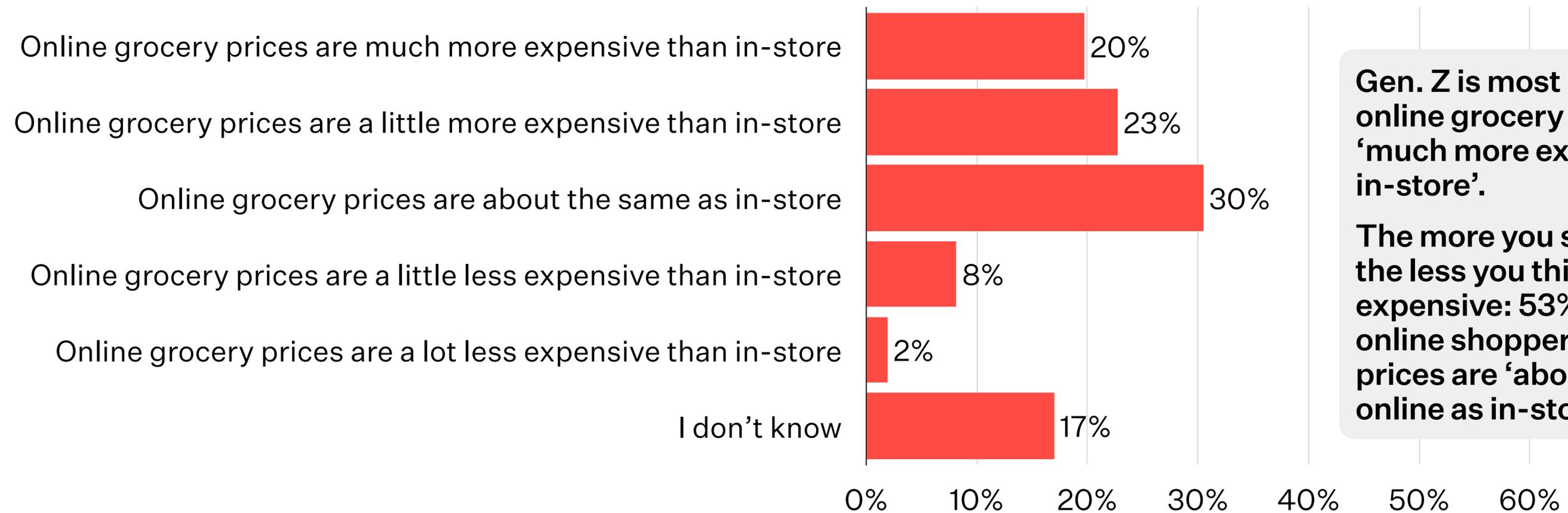
## Indexed US consumer spending at Thrive Market, Hungryroot, and CookUnity — Consumer Edge



Data: Consumer Edge card transaction data. US only. Trailing 12 months. All indexed to 100 = Hungryroot spend in January 2023.

# There's still a strong perception that online grocery costs more than in-store

In general, does it seem like online grocery prices are more expensive, less expensive, or about the same as in-store?



**Gen. Z is most likely to say online grocery shopping is 'much more expensive than in-store'.**

**The more you shop online, the less you think it's expensive: 53% of heavy online shoppers think prices are 'about the same' online as in-store.**

# The more you shop online for groceries, the more you love it

“Online grocery shopping is a great value”

Agree:

67%

Active online grocery shoppers

41%

Mostly in-store grocery shoppers

“Online grocery shopping is overpriced”

Agree:

34%

Active online grocery shoppers

47%

Mostly in-store grocery shoppers

“Online grocery shopping is convenient”

Agree:

84%

Active online grocery shoppers

67%

Mostly in-store grocery shoppers

“I generally trust the groceries that I buy online”

Agree:

77%

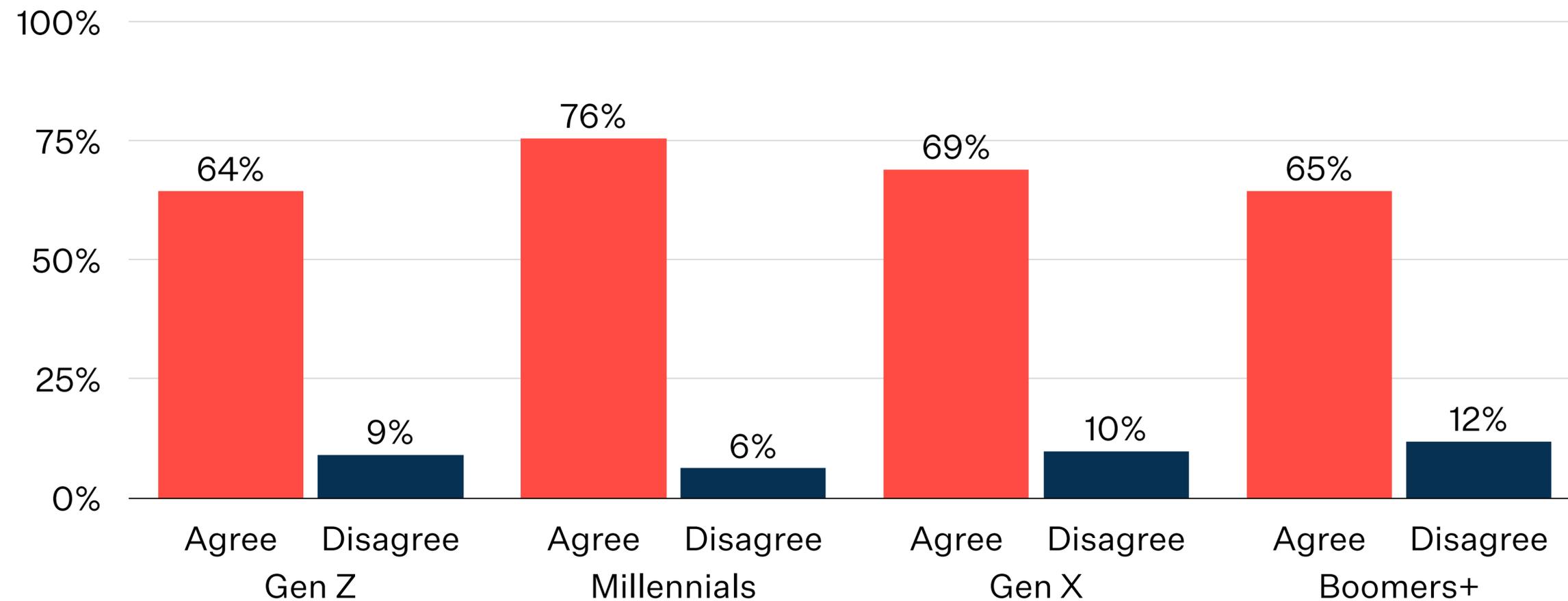
Active online grocery shoppers

46%

Mostly in-store grocery shoppers

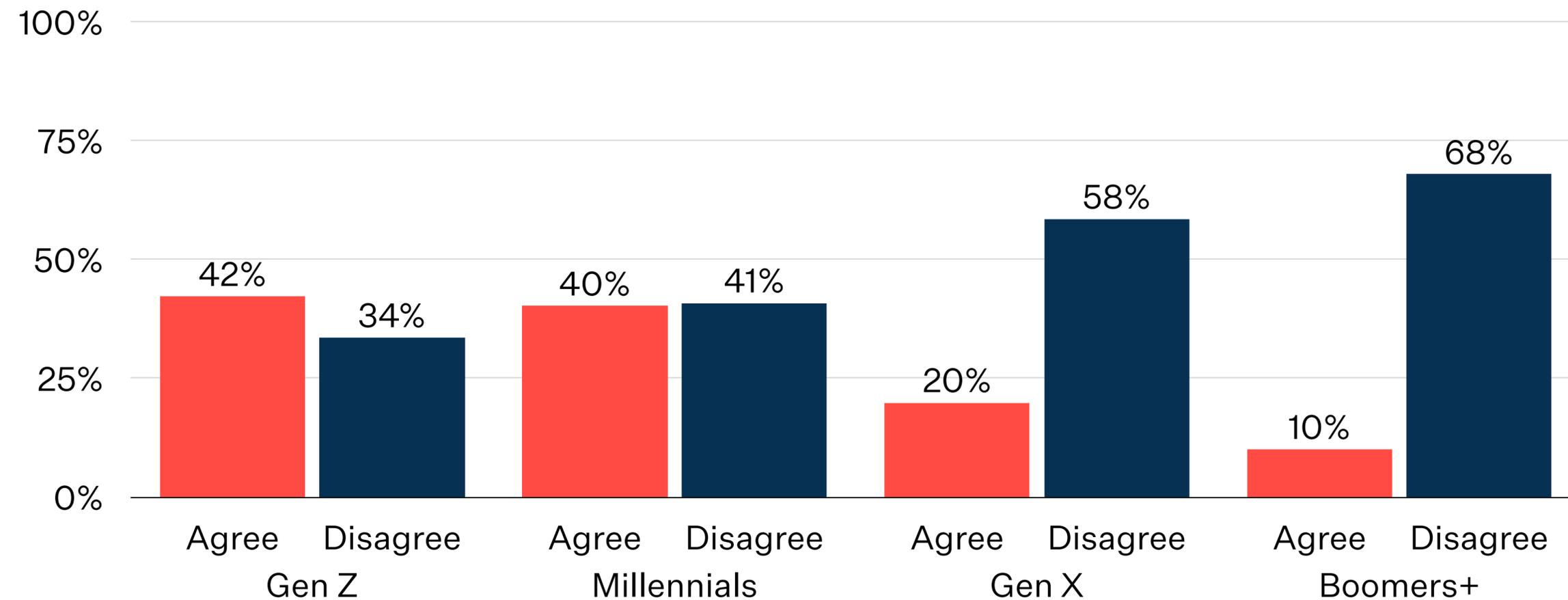
# Most people think grocers should have to charge the same prices online as in-store

‘Online grocers should be required to charge the same prices as in-store for the same products’



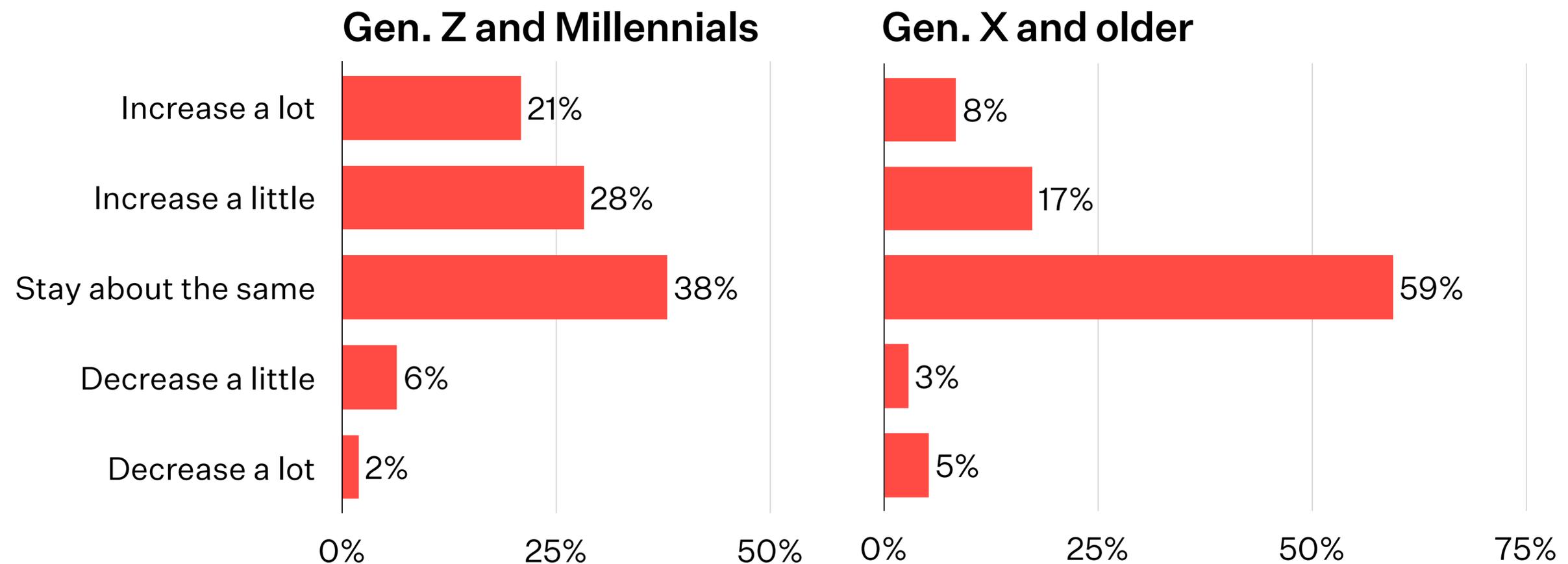
# Younger consumers are more accepting of dynamic pricing for online groceries

‘Online grocers should be allowed to charge some shoppers more for the same products based on their shopping behavior’



# 48% of Gen. Z and Millennials plan to increase their online grocery spend

Percentage of responses: Over the next year, do you expect the share of your grocery spending that happens online to...

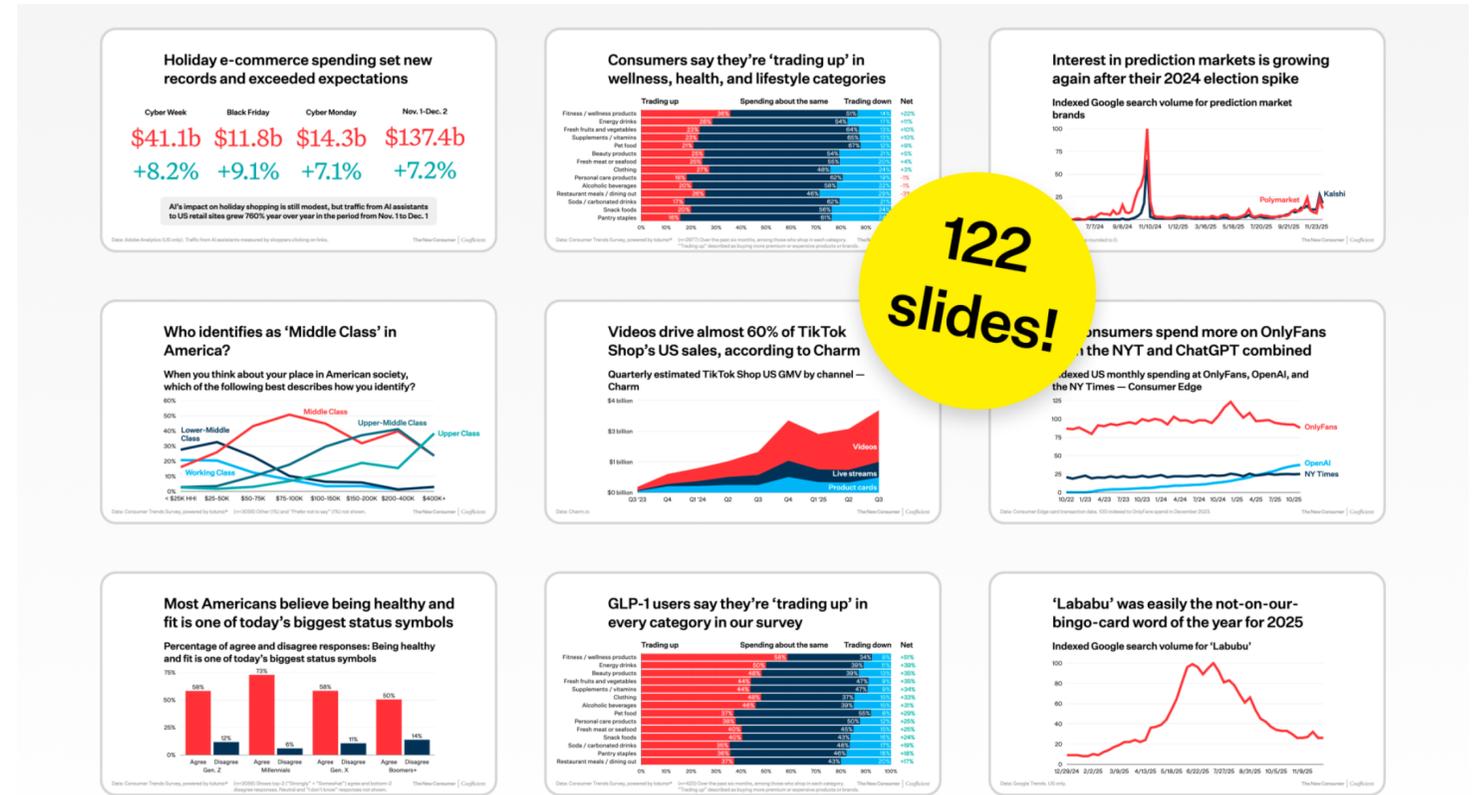


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