tastewise

Summer 2026
F&B trend forecast

- 5 signals
- What's actionable?
- What's expected?
- What most brands will miss?



Tastewise: The agentic AI partner for food and beverage



Consumer panels

- Home cooking
- Synthetic surveys
- Observed social behavior
- Segmented to bespoke audiences

Market trackers

- Best-sellers
- eRetail, K-12, C-store
- LTOs
- Restaurant menus, with largest coverage of independent operators

METHODOLOGY

How to read this report.

All signals reflect real consumer behavior across the Tastewise US consumer panel. It's modeled from billions of food and beverage moments into a statistically significant, F&B-specific view of the full US population.

01

Consumer behavior, not chatter.

Data is sourced from observed consumer signals and modeled into population-representative behavior. We never say 'conversations mention X.' Instead, we say '1 in 3 consumers choose X.'

02

Growth + reach, always paired.

A signal growing +90% YoY means nothing without knowing how many consumers it reaches today. Every trend in this report pairs velocity with scale.

03

Forward-looking, not lagging.

Trends are assessed at their current lifecycle stage. These may be early, emerging, trending, or mature, so you know whether to build ahead of demand or defend existing share.

THE BRIEF

Three conversations are happening in every CPG brand right now.

SELL-IN

Retail teams need proof.

Buyers want to know what consumers are actually choosing — not trend decks from six months ago. The shelf decision is made on evidence of real demand, not intuition.

"We can't defend our assortment without real-time consumer data."

INNOVATION

Innovation teams need direction.

12–24 month pipelines mean summer 2026 decisions are being made today. The question isn't 'what's trending' — it's 'what has real consumer pull and where is the shelf gap?'

"We're validating too late. By launch, the trend has peaked."

MARKETING

Marketing teams need the moment.

Every summer brief looks the same. The brands that win own an occasion nobody has named yet — and consumer data to prove it resonates before spending the budget.

"Our summer campaign was built on assumptions, not signals."

THE SIGNALS

5 signals – one decision per trend.

01 ACT WITH DIFFERENTIATION

Craft the premium sip

LTO at $7–10. Occasion prestige, not just refreshment.

Gourmet +188% · Premium +122%

02 MOVE NOW — 6-MONTH WINDOW

Fill the hydration gap

RTD with one functional claim. Lifestyle format, not sport.

Volume +34% · Anti-bloat +88%

03 ACT BEFORE THE SHELF FILLS

Own chili-fruit

Frozen or sparkling RTD. Lead with cultural authenticity.

Sweet & spicy +19% · 50+ menus, 0 retail SKUs

04 BUILD AHEAD — 18-MONTH PLAY

Build the adaptogen RTD

Sparkling, light flavor. Lead with refreshment, not supplement.

Wellness +103% · Brain function: 1 in 3

05 90-DAY CAMPAIGN PLAY

Claim summer serenity

Reframe your existing product. Calm · slow · present.

Serenity +275% · No brand owns this occasion

01 CRAFT THE PREMIUM SIP · SIGNAL

Premium sips.

Gourmet is growing 3× faster than refreshment. About 1 in 7 summer consumers already pairs both — and no CPG brand owns it.

The formats winning on menus — granitas, artisan shrubs, elevated agua frescas — are virtually absent from retail. Gourmet up +188% YoY. Premium up +122% YoY. Consumers are building what the shelf doesn't offer. That is the gap.

TASTEWISE US CONSUMER PANEL · 6-MONTH ROLLING WINDOW



+188%
Gourmet claim YoY

+122%
Premium claim YoY

+60%
Homemade occasion YoY

+55%
Refreshing claim YoY

01 Craft the premium sip with evidence that moves.

CLAIM MOMENTUM YOY

Gourmet	+188%
Premium	+122%
Homemade	+60%
Refreshing	+55%
Artisan	+38%

RISING INGREDIENTS · EARLY LIFECYCLE

matcha +6.9%	date +18.5%	avocado +12.2%
chocolate +10%	cherry +8.7%	lychee +5.8%
chili pepper +12.6%	mushroom +6.1%	slushie +7%

THE SHELF GAP

Restaurant-only today. No CPG has moved format to retail.

Premium granita, artisan shrub, and elevated agua fresca are restaurant-only today. No CPG brand has moved the format to retail. The homemade signal (+60% YoY) validates a DTC kit play — consumers are literally building what doesn't exist yet.

RETAIL SELL-IN STORY

LTO at $7–10. Position as occasion prestige.

Lead with the occasion brief: 'This is the drink 1 in 7 summer consumers wants — and no one is selling it at retail.' LTO at $7–10. Position as occasion prestige, not just refreshment. Pair velocity (Gourmet +188%) with scale to close the buyer.



02 FILL THE HYDRATION GAP · SIGNAL

Hydration gap.

1 in 2 hydration consumers now expects a secondary benefit. The RTD shelf doesn't deliver it.

Anti-bloat up +88% YoY. Consumers are making their own versions at home. The format gap is open now. It closes in 6–12 months when a challenger picks it up.

TASTEWISE US CONSUMER PANEL · 6-MONTH ROLLING WINDOW



+34%
Consumer volume YoY

+89%
Dish occasions YoY

+38%
Energy claim YoY

+88%
Anti-bloat claim YoY

02 Fill the hydration gap with evidence that moves.

GROWING FUNCTIONAL CLAIMS IN HYDRATION (YOY)

Anti-bloat	+88%
Creatine	+58%
Energy	+38%
Athlete recovery	+27%
Anti-inflammatory	+14%
Brain function	+7%

WHICH AUDIENCE TO OWN — PICK ONE

Women 25–40	**Anti-bloat**	Highest share in category
Gen Z	**Clean energy**	Energy up +38% YoY
Millennials	**Stress relief**	Premium wellness brief

THE FORMAT GAP

Creatine is crossing out of the gym.

Creatine consumer volume is up +58% YoY — and it's crossing out of the gym. It's showing up alongside hydration, electrolytes, and clean energy in the same consumer moment. Every existing product is powder, sport-coded, or both. The lifestyle RTD that brings creatine to a non-gym audience doesn't exist. That's the brief.

INNOVATION + SELL-IN STORY

RTD format, lifestyle packaging. One claim.

Anti-bloat for women 25–40, clean energy for Gen Z, or creatine for the post-gym crossover consumer. The creatine angle is particularly open: +58% YoY, zero lifestyle RTD competition. Sell-in framing: 'I in 2 hydration consumers wants something the shelf doesn't offer. The window is 6–12 months.'



03 OWN CHILI-FRUIT · SIGNAL

Chili-fruit.

Chamoy is completing the same crossover Tajín made 5 years ago — but the retail shelf hasn't moved yet.

About 1 in 3 consumers engaging with spicy-sweet reaches it through a Latinx-inspired format. Sweet & spicy is the fastest-growing flavor combination in the panel. Chamoy is present on 50+ operator menus — and has essentially zero retail presence.

TASTEWISE US CONSUMER PANEL · 6-MONTH ROLLING WINDOW



+200%
Spicy-sweet volume YoY (est.)

+19%
Sweet & spicy claim YoY

50+
Operator menus carry mangonada

0
Mainstream retail SKUs

03 Own chili-fruit with evidence that moves.

WHERE CONSUMERS ARE ALREADY BUYING IT

Mangonada · Gong Cha	$9.10
Chili mango gummy bears · La Horchateria	$6.29
Frozen spicy mango chamoy boba · Charlotte's Coffee House	$10.20
Mangonada bowl · Juiced Up Nutrition	$10.00
Mango chamoy · Katsubo Tea	$8.95
Chamoyada shake · Las Delicias	$6.50

TOP CLAIMS IN CHILI-FRUIT (PANEL SHARE)



THE CULTURAL AUTHENTICITY BRIEF

Partner or license from Latinx-founded companies.

This trend has deep Latinx roots. The formats — mangonada, chamoyada, diablito — have built-in cultural identity. Brands that partner with or license from Latinx-founded companies will win credibility and community. Brands that simply apply Tajín to existing products will face backlash.

INNOVATION + SELL-IN STORY

Frozen retail or sparkling RTD.

Mangonada-inspired popsicle or sorbet, or sparkling RTD with chamoy/chili-lime flavor. Sell-in framing: 'This format is on 50+ operator menus with zero retail competition. That's the white space.' Act before the format crosses fully and shelf space is gone.



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04 BUILD THE ADAPTOGEN RTD · SIGNAL

Adaptogen RTD.

Ashwagandha is declining. Reishi and cacao-mushroom are rising. The category has shifted to brain performance .

68% of adaptogen consumers cite brain function as their primary reason. Every product on shelf is warm-format. The sparkling summer RTD that delivers this does not exist at scale. Brands that build it now will own the shelf when the category hits mass in 2–3 years.

TASTEWISE US CONSUMER PANEL · 6-MONTH ROLLING WINDOW



+50%
Adaptogen volume YoY

+103%
Wellness claim YoY

1 in 3
Consumers: brain function as job #1

+17.8%
Reishi growth YoY

04 Build the adaptogen RTD with evidence that moves.

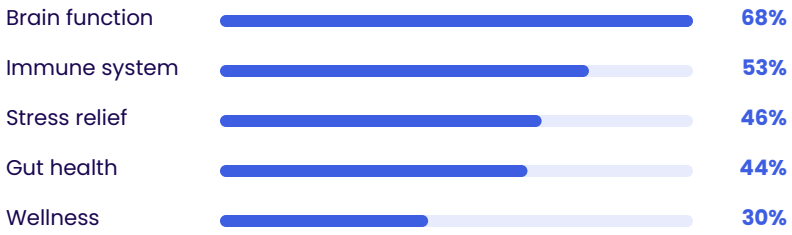
INGREDIENT SHIFT — RISING VS. FADING

Reishi	**+17.8%**	immune, longevity
Cacao-mushroom	**+15.5%**	taste-led
Rhodiola	**+4.9%**	focus, energy

FADING

Ashwagandha	**-6.7%**	stress/calm fading
Turkey tail	**-15.8%**	immunity plateau

TOP FUNCTIONAL CLAIMS — ADAPTOGEN BEVERAGES (SHARE)



THE FORMAT BRIEF

Sparkling RTD, light flavor.

Yuzu-lime, prickly pear, or watermelon. Lion's mane + L-theanine functional stack. Lead with 'focus + refresh', never 'health supplement.' The brands that launch now own the shelf when the category reaches mass in 18–24 months.

INNOVATION STORY — BUILD AHEAD OF DEMAND

The parallel is Four Sigmatic in 2015.

This is a defend-your-position-early play. Niche at launch, mainstream by 2022. Sell-in framing: 'This category is reaching new consumers 50% faster year over year. The cold RTD format doesn't exist yet. We launch before the market.'



05 CLAIM SUMMER SERENITY · SIGNAL

Summer serenity.

Serenity +275%. Cozy +269% . Both are winter claims — both are peaking in summer data right now.

1 in 3 consumers in this space pairs an emotional claim with an indulgent one — not choosing between pleasure and wellness, demanding both. No brand has built a summer serenity occasion. The product to claim it probably already exists. This is a 90-day campaign brief.

TASTEWISE US CONSUMER PANEL · 6-MONTH ROLLING WINDOW



+275%
Serenity claim YoY

+269%
Cozy claim YoY*

+170%
Relaxation claim YoY

0
Brands own 'summer serenity'

05

Claim summer serenity with evidence that moves.

MOOD + ESCAPE CLAIMS — YOY VELOCITY

Serenity	+275%
Cozy	+269%
Relaxation	+170%
Wellness	+164%
Mental health	+137%

CLAIMS THAT CO-OCCUR WITH SERENITY/WELLNESS

refreshing · indulgent · premium · ritual · gut health · soothing · nourishing · anti-bloat · celebration

THE WHITESPACE BRIEF

The summer serenity occasion is unowned.

About 1 in 3 consumers pairs wellness with indulgence in summer. Ritual as a claim is up +200% in beverages — consumers are actively seeking slow, intentional product experiences. You probably don't need a new product to claim it.

MARKETING STORY — 90-DAY CAMPAIGN BRIEF

Calm · slow · present.

Visual language: afternoon light, stillness, ease — not hustle, not optimization. This is a creative brief, not an innovation sprint. Reframe what you already make. Sell-in framing: 'Every mood brand campaigns in January. This is the first brand to own summer.'



DECISION SCORECARD

What to act on, and when.

Five trends, five verdicts — paired with the urgency you need to move on each.

#	TREND	VERDICT	WHAT'S NEW · THE GAP		MOVE	URGENCY
01	**Craft the premium sip**	EXPECTED	Gourmet velocity is new.	No CPG owns craft refreshment.	Act with differentiation	MEDIUM
02	**Fill the hydration gap**	ACTIONABLE	Secondary claim layer is new.	RTD functional lifestyle = empty.	Move now — gap open today	HIGH
03	**Own chili-fruit**	ACT NOW	Chamoy crossover is new.	50+ menus, 0 retail SKUs.	Act before the shelf fills	HIGH
04	**Build the adaptogen RTD**	BUILD AHEAD	Cold format leap is new.	Sparkling RTD doesn't exist.	Build ahead of demand	LOW NOW / HIGH IN 18MO
05	**Claim summer serenity**	CAMPAIGN NOW	Summer serenity is new.	No brand owns this occasion.	Campaign play — 90 days	HIGH

AUDIENCE LENS

Your summer campaign may be written for the wrong generation.

GEN Z

Beverage-first, experience-led.

refreshing · hydration · gut health · fun · energy · trendy

About 1 in 2 Gen Z interactions lead with novelty or visual appeal. Functional claims are growing fast underneath. The format has to be shareable before it's functional.

MILLENNIALS

Premium wellness without compromise.

wellness · premium · artisan · authentic · celebration · indulgent

About 1 in 3 Millennial signals pairs an indulgent claim with a health cue. Premium and wellness are not opposites for this cohort — they are the same ask.

GEN X

Convenience + trusted quality.

convenient · easy · fresh · traditional · nostalgic · affordable

Nostalgic formats with modern upgrades resonate. Classic summer dishes re-imagined with cleaner ingredients or an easier prep story.

BOOMERS

Health-first, trust-driven.

healthy · heart health · immune system · fresh · traditional · natural

Functional claims (heart health, immune support) are growing 67–99% YoY with Boomers. Clean labels and familiar formats win.

SEASONAL OCCASIONS

Missing one of these occasions means waiting a full year.

Weekend

1 in 13 restaurants

Serve specifically weekend-coded dishes or specials.

Intense flavor

133% YoY

"stress relief" +68% · "cozy" +35%

Summer flavors are shifting to intense + restorative. Consumers want bigger flavor and emotional decompression in the same window.

Sweet moments

+16.7% YoY

Growing steadily over 12 months — a structural part of summer behavior.

Energy occasions

+102% YoY

Explosive and food-led. Consumers want food formats that deliver energy alongside refreshment.

Seasonal occasions

+106% YoY

Consumers are flagging seasonal eating — cue for LTO and limited-edition messaging.

Homemade

+59.5% YoY

Restaurant-quality at home is taking real share. Enable the moment with kits or premium components.

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Ready to run this brief for your category?

The human- and agent-powered food intelligence and marketing platform. Every signal in this report was modeled from billions of consumer moments — tailored for your category, channel, and audience.

EXPLAINABLE

Every signal is significant.

Statistically significant and F&B-specific. Clear enough for a non-expert. Credible enough for a CFO.

BESPOKE

Tailored to your brief.

Tailored to your category, channel, and audience. Not a generic template — a brief built for your decision.

REPEATABLE

Market trackers that last.

Market trackers your team returns to over time. Consistent methodology. Dependable signal.

CONVICTION-READY

Sell-in narratives that land.

Sell-in narratives and growth stories your retail and foodservice buyers trust to say yes.

Trusted by

pepsico KraftHeinz Nestlé

and over **80%** of the world's leading food and beverage brands.
Let's build the narrative that will win you conviction.

Book a demo →

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