



▲▲ MATTSON *Webinar*

EXPO WEST '25

Trends
& Treasures



EXPO WEST '25 TRENDS / What We Saw





**The Protein
-ization Of
Everything**



**Functional
Beverage
Flood**



**Go With
Your Gut**



**DIY
Dosing**



**Feminine
Affirmative**

The Protein-ization of Everything

The **Protein-ization of Everything** was impossible to miss at Expo West 2025. Protein remains the most sought-after attribute in snacks across Gen Z, Millennials, and Gen X, with nearly 50% of these age groups prioritizing it. As the **snackification of everything** continues, brands are finding creative ways to deliver protein across diverse categories. We saw this play out in three key ways: **Mighty Bites of Protein**, **Putting Protein on the Radar**, and **There's Clearly a Way** to infuse protein into almost anything.

Mighty Bites of Protein highlighted nutrient-dense, snackable options, including DrumRoll Donuts, Honey Mama's, Lesser Evil's Puffs, and Kibo Veggie Crunch, plus unexpected entries like Sturdy Sauce, proving even sauces can be protein-rich.

Putting Protein on the Radar emphasized brands showcasing existing protein content more prominently, like Bob's Red Mill Protein Oats.

There's Clearly a Way But, it's hard! Showcased innovations in clear whey, fueling high-protein beverages and beyond, prove that protein truly is everywhere... But, seamlessly integrating it into product categories is difficult to do while delivering the hedonics necessary to succeed. At Mattson, we don't see the need for protein and nutrient dense products slowing, as we watch this continue in our longitudinal GLP-1 study that we kicked off in December 2023.



EXPO WEST '25 TRENDS / The Protein-ization of Everything Examples



Honey Mama's Protein Crunch Bar

Delivers 8g of plant-based protein in a rich, truffle-like bar made with real, whole foods

honeymamas.com



DrumRoll Donuts

protein-packed, plant-based donuts with just 1g of sugar and 10g of protein

eatdrumroll.com



Sturdy Pasta Sauce

High-protein sauce with 10g of protein per serving

sturdysauce.com



Bob's Red Mill Protein Oats

hearty whole grain oats boosted with 10g of protein from oats per serving

bobsredmill.com

Todd's Egg-cellent Protein Puffs

Baked, gluten-free snacks made with egg white, 12g of protein per serving

toddsbetersnacks.com



Kodiak Cookie Butter Granola

Protein-packed snack with 17g of protein per serving

kodiakcakes.com



Simply Tera's

Packed with high-quality protein and made with clean, simple ingredients

simplyteras.com



Ascent Clear Whey

Light, refreshing protein drink with 20g of fast-digesting whey protein and zero added sugar

ascentprotein.com

EXPO WEST '25 TRENDS

Functional Beverage Flood

The **Flood of Functional Beverages** at Expo West 2025 was impossible to ignore. With the **American wellness market reaching \$480B** and growing at **5-10% per year**, the rise of functional beverages is no surprise.

The concept of striving for a long healthspan versus lifespan continues to drive innovation, pushing the supplementation of everything in food & beverage. The functional beverage category is booming with products promising benefits for **hydration, brain health, focus, calm & balance, gut health, skin health, immunity, and satiety**—but there's one major watch-out: **don't take the fun out of functional**. Even if a drink works, it still has to **taste good**.

Behind protein, **low sugar is the second most sought-after attribute** in BFY (better-for-you) products, especially for aging consumers. However, balancing **low sugar formulations, high-intensity sweeteners, and functional actives like botanicals, adaptogens, and nootropics** is a challenge.

This year, we saw a flood of new launches that nailed **concept** but fell short on **execution**—proving that taste, mouthfeel, and overall beverage experience must match the functional promise. If brands want consumers to keep coming back, they can't forget the golden rule: **food and beverages must taste good** first.



EXPO WEST '25 TRENDS / Functional Beverage Flood Examples



GORGIE

Zero-sugar sparkling energy drink with 160mg of clean caffeine and functional ingredients to fuel focus and mood

getgorgie.com



LOVE

Zero-sugar electrolyte drink with sodium, potassium, and magnesium for clean, balanced hydration

drink.love



Recoup

Sparkling probiotic drink with electrolytes, real ginger, and 3g of fiber for gut-healthy hydration

recoupwellness.com



Atomico
High-protein energy drink with 20g of whey protein and natural caffeine

goatomico.com



Superroot

Root-powered drink mix with minerals and vitamin C for natural energy, immunity, and hydration

drinksuperroot.com



Slice

Fruity, functional soda with real juice, zero added sugar, and 5g of prebiotic fiber to support gut health

slicesoda.com



Weird Yerba

Sparkling yerba mate energy drink with organic caffeine, real fruit flavors, and zero added sugar

drinkweird.com



Fresh Fizz Soda

Better-for-you soda made with organic juice, botanical extracts, and zero added sugar

freshfizzsodas.com



Local Weather

Clean sports drink that fuels hydration, energy, and focus with functional ingredients

drinklocalweather.com

EXPO WEST '25 TRENDS

Go with Your Gut

Gut health has moved beyond digestion to become a **cornerstone of overall wellness**, with **growing scientific evidence** linking it to **immunity, mental health**, and even **metabolic function**.

Consumers are increasingly seeking food and beverage options that support a balanced microbiome, leading to a surge in products featuring **prebiotics, probiotics, and postbiotics**. From **fermented foods to fiber-rich snacks**, brands are capitalizing on the demand for functional nutrition that aligns with holistic health trends. As a result, gut health is no longer a niche category but a **mainstream priority** that continues to evolve with new research and innovation.

This trend is particularly strong in the beverage sector, where functional drinks infused with pre- and probiotics, adaptogens, and botanicals are gaining traction. **Better-for-You sodas**, elixirs, and tonics are marketed for digestive benefits and their role in stress relief, energy support, and overall vitality were prominent at Expo 2025. The broad appeal of gut health is evident across various formats and delivery systems, from ready-to-drink kombuchas to dairy-free yogurts and snack bars with added prebiotic fiber.

Despite being an established trend, its momentum shows **no signs of slowing down** as consumers increasingly recognize the gut as a **foundation for well-being**, proving that when it comes to health, it pays to go with your gut.



EXPO WEST '25 TRENDS / Go with Your Gut



Simply Pop

Beverage that combines real fruit juice with prebiotic fiber, vitamins, and minerals

coca-cola.com



Inner Eco Probiotic Coconut Water

Probiotic coconut water kefir boosts gut health with live cultures.

inner-eco.com



Wildbrine Probiotic Spicy Kimchi Sriracha

Bold, gut-friendly hot sauce blending fermented kimchi flavors with sriracha heat.

wildbrine.com

OoMee with Seabiotics

Uncarbonated, vegan drink made with Sea-biotics™ – blend of kelp, chlorella, spirulina, fish collagen, bladderwrack and algal vitamin D3 to support digestive health

oomee.life



Everyday Reset Kombucha

Beverage powder mix that instantly makes a gut-supporting fermented tea beverage with a quick mix of water.

everydaze.com



Biora Kombucha Dressing

Probiotic-rich salad dressing with fermented kombucha

biorafoods.com



Kefirkult Coconut Kefir

Probiotic-rich, dairy-free yogurt with 1.47 trillion CFU/mL, made from coconut milk, water, and live kefir grains. No additives, dairy, or gluten.

kefircultures.com



Edible Garden Pickle Party

Functional pickle with bold, tangy flavor with gut-friendly probiotics and health benefits

ediblegardenag.com/pickle



Friendly Grains Mini Crunchy Rollers

Prebiotic puffed organic brown rice with tummy friendly probiotics

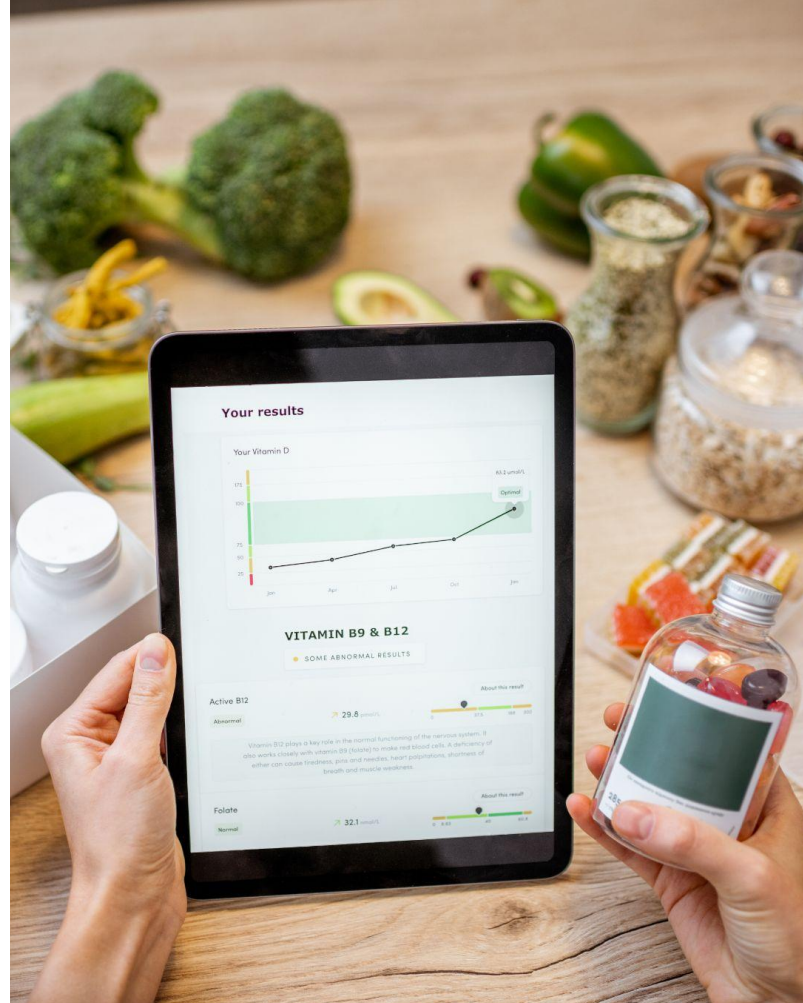
friendlygrains.com

DIY Dosing

This trend is about **taking control and customizing** what you ingest to address your personal needs - it's not new, but it continues to grow.

It is driven by big macro trends like *Food Is Medicine* and *Personalization*, as well as influenced by a significant cohort of younger consumers who **look to social media wellness gurus first for health advice** before their doctor. And on the other end of the age spectrum, it is also practiced by Boomers and Gen Xers trying to stave off the inevitable with supplements and superfoods in the hopes of **expanding not just their lifespan but their active healthspan**.

DIY Dosing is enabled by the evolution of supplements beyond pills into innovative formats like **stick packs, sachets, drops** and digitally integrated regimens that blend seamlessly with a healthy diet and on-the-go lifestyle. Product formats easily extend into drink powders and **DIY boosts of protein, electrolytes, probiotics, adaptogenic mushrooms, caffeine** and others. **Gummies and shots** also abound as a popular quick fix to add a hit of “nutrient-fill-in-the-blank” to your day.



EXPO WEST '25 TRENDS / DIY Dosing Examples



Water Boy Hydration

Sugar free hydration stick packs with electrolytes and formulated for different need states like daily support, hangover relief and post-workout (Congrats by the way!)

waterboy.com



Ritual Vitamins

Personalized, subscription-based supplements tailored for everyday wellness

ritual.com



NutriSips Sachets

Single-serve, mix-and-go supplement packs for busy lifestyles

nutrisips.com

Om Mushroom Gummies

Elevate your daily wellness, balance and immune health with adaptogenic gummies from the mushroom experts

ommushrooms.com



Equip Protein Powder Sachets

Ready-to-mix, precisely dosed supplements that support active living

equipfoods.com



Everydaze Essential Collagen Solution Jelly Stick

3,000 mg of plant-based collagen in tasty, on-the-go flavors to support skin, hair, and joint health

everydaze.com



Barlean's Mood Drops

Blends of herbs and adaptogens to de-stress and promote calmness

barleans.com



Vital Proteins Collagen Gummies

support skin, hair, and nail health with 2.5g of clinically tested collagen peptide

vitalproteins.com/

Feminine Affirmative

Fun fact: Before 1993, women were rarely included in clinical trials. The medical field still doesn't know how well many drugs and devices work for women. At least today, women account for 40% of participants in clinical trials despite being 51% of the population. So some progress is being made, but not enough.

According to McKinsey, “investments **addressing the women's health** gap could add **years to life and life to years**—and potentially boost the global economy by **\$1 trillion annually by 2040.**”

Investment in female health and improving our healthspan was apparent at Expo with food, beverage, supplements and personal care products scientifically engineered to address **fertility, hormonal balance, menopause, sexual wellness, sleep support and overall nutritional needs** across all ages. And it was gratifying to see the topic scientifically acknowledged and openly discussed with candor (and sometimes humor).

Not to leave out the other half - humorous, male-focused brands Dude Wipes and Happy Nuts won us over with the mission to keep male nether regions clean and happy too.



EXPO WEST '25 TRENDS / Feminine Affirmative Examples



Ovu
fertility &
women's health
bars

ovubar.com



O Positive Health
OB-GYN formulated
products to support
women from their first
period to well beyond
their last with products
like PREGGO, FLO,
MENO and URO

opositiv.com



FemFuelz
high-protein,
nutrient-dense mixes
and snacks specifically
crafted for women's
active lifestyles

femfuelz.com

Tea Botanics
Line of Menopause
Teas - Night Sweat
Tea, Hot Flash Tea,
Brain Fog Tea

teabotanics.com



**Mountain Meadow
Herbs**

Natural, herbal products
crafted to support
women's health, balance,
and well-being

mmherbs.com



Foria
a brand offering natural,
science-backed sexual
wellness products

foriawellness.com



OLLY
Happy Hoo-Ha
Helps maintain a healthy
vaginal microbiome and
balanced pH with a powerful
blend of probiotics

olly.com



Mixhers
All-natural drink mixes
that support women's
hormonal balance,
energy, mood, and
cycle health

mixhers.com

WHAT DOES THIS MEAN FOR YOU?

With complex, functional products designed to deliver protein-rich, gut-friendly, mood-enhancing, age-defying solutions tailored to emerging consumer audiences paired with quickly evolving policies and regulations that could reshape product, nutrition, and ingredient requirements across existing products, the demand for skilled product developers, advanced commercialization methods, and visionary product strategies is more important than ever.



3,000 EXHIBITORS (1/3 FIRST TIME)

With nearly 1,000 “new to Expo West” exhibitors, the energy was high and positive! *(90% of those attending Expo West Business School were attending Expo for the first time!).*

64,000+ IN ATTENDANCE

Estimates vary, but the show brought out a high quality mix of brands, retailers, investors, and service providers *(at attendance costs that nearly doubled past years).*

HIGHER RETAILER ENGAGEMENT

Retailers were out in force! They were visiting with brands, scheduling meetings, holding pitch slam events, and engaging with brands.

DEALS ARE IN THE WORKS

Capital investment teams – angels, private equity and venture specifically – were locked in and looking for deals, if they weren’t already locked in rooms working to finalize deals.



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QUESTIONS? REACH OUT TO CONTACT@MATTSONCO.COM