

# Consumer Trends

Food & Wellness 2025



**The New Consumer**

*Coefficient*  
**Capital**

DATA PROVIDED BY





# 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 services
- [newconsumer.com](https://newconsumer.com)

Coefficient  
Capital

# Coefficient Capital

- Launched in 2018 by Franklin Isacson and Andrew Goletka
- Investments in digitally powered consumer brands
- Focus on transformational consumer shifts
- [coefficientcap.com](https://coefficientcap.com)

# Coefficient Capital Portfolio



Personalized  
pet nutrition



Cooking solutions for  
the new consumer



Sustainable,  
functional hydration



Personalized men's  
personal care



Global plant-based  
dairy leader



Low-carb  
breakfast innovator



Direct-to-patient  
healthcare



Next-generation  
restaurant brand



Innovative  
wellness brand



Clinical  
nutritional formulas



Functional energy  
beverage company



Pasta sauce for the  
modern consumer



Autonomous, robotic  
last-mile delivery



Science-backed  
personalized nutrition



Healthy  
European snacking

# Consumer Trends **SPECIAL!**

- We're back with a **special report(!)** for Spring 2025, focused on food and wellness
- 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 12 surveys of 3,000+ US consumers, most recently in February 2025
- Powered by Toluna, “delivering real-time consumer insights at the speed of the on-demand economy” [tolunacorporate.com](https://tolunacorporate.com)

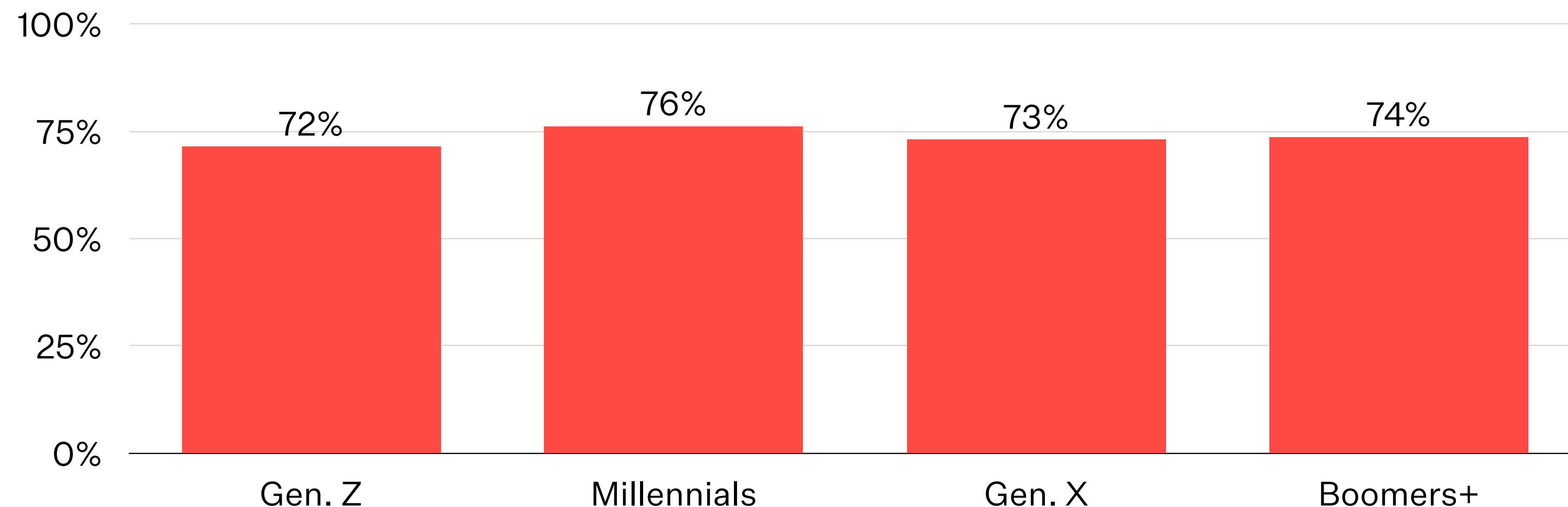
1

There's a new meme-y mandate  
that's entered mass culture:  
*Make America Healthy Again*



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

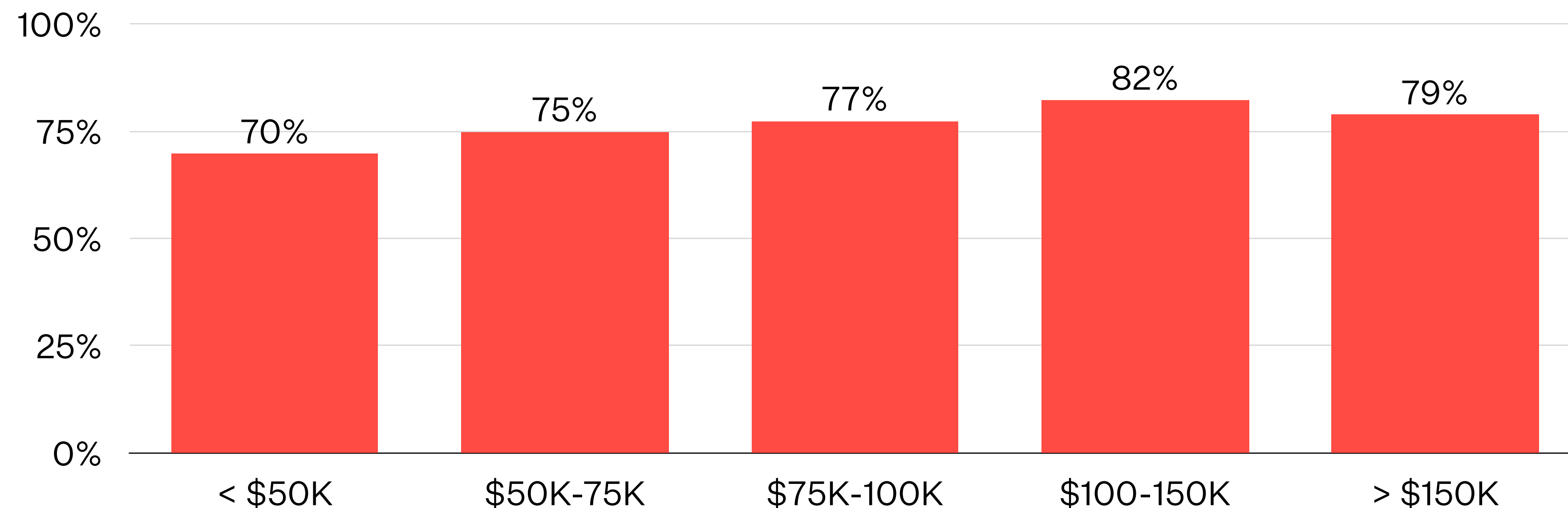
Percentage of 'The top priority' and 'A high priority' responses by generation: Over the next year, how do you plan to prioritize your health and wellness?





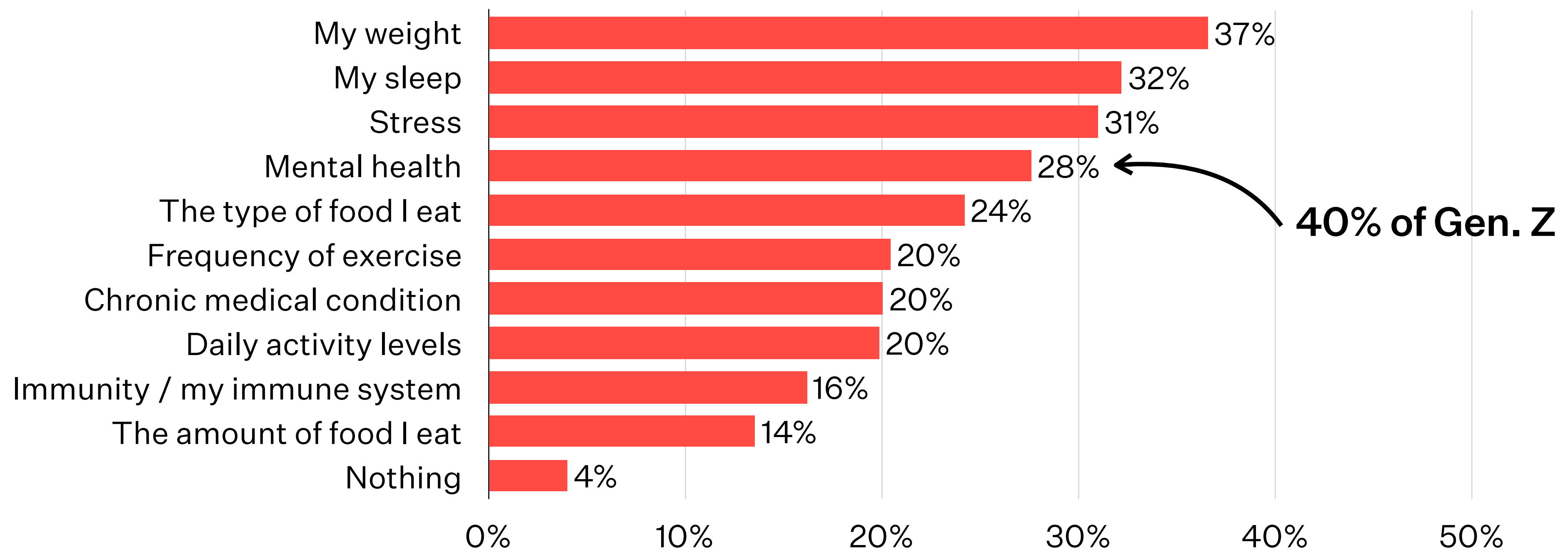
# Wealthier consumers are more likely to say they'll prioritize their health

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



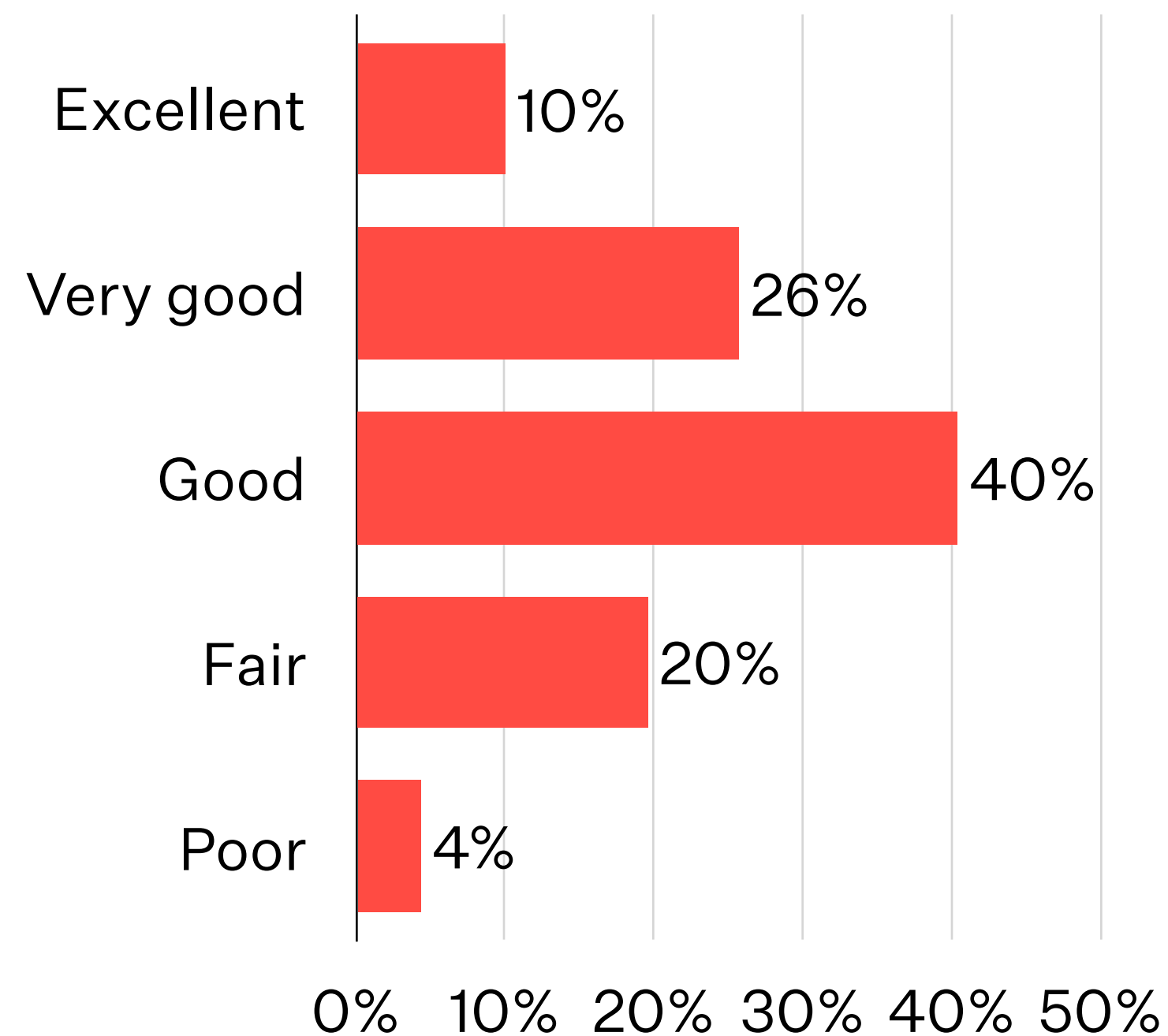
# Americans say they're most concerned about their weight, sleep, and stress

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

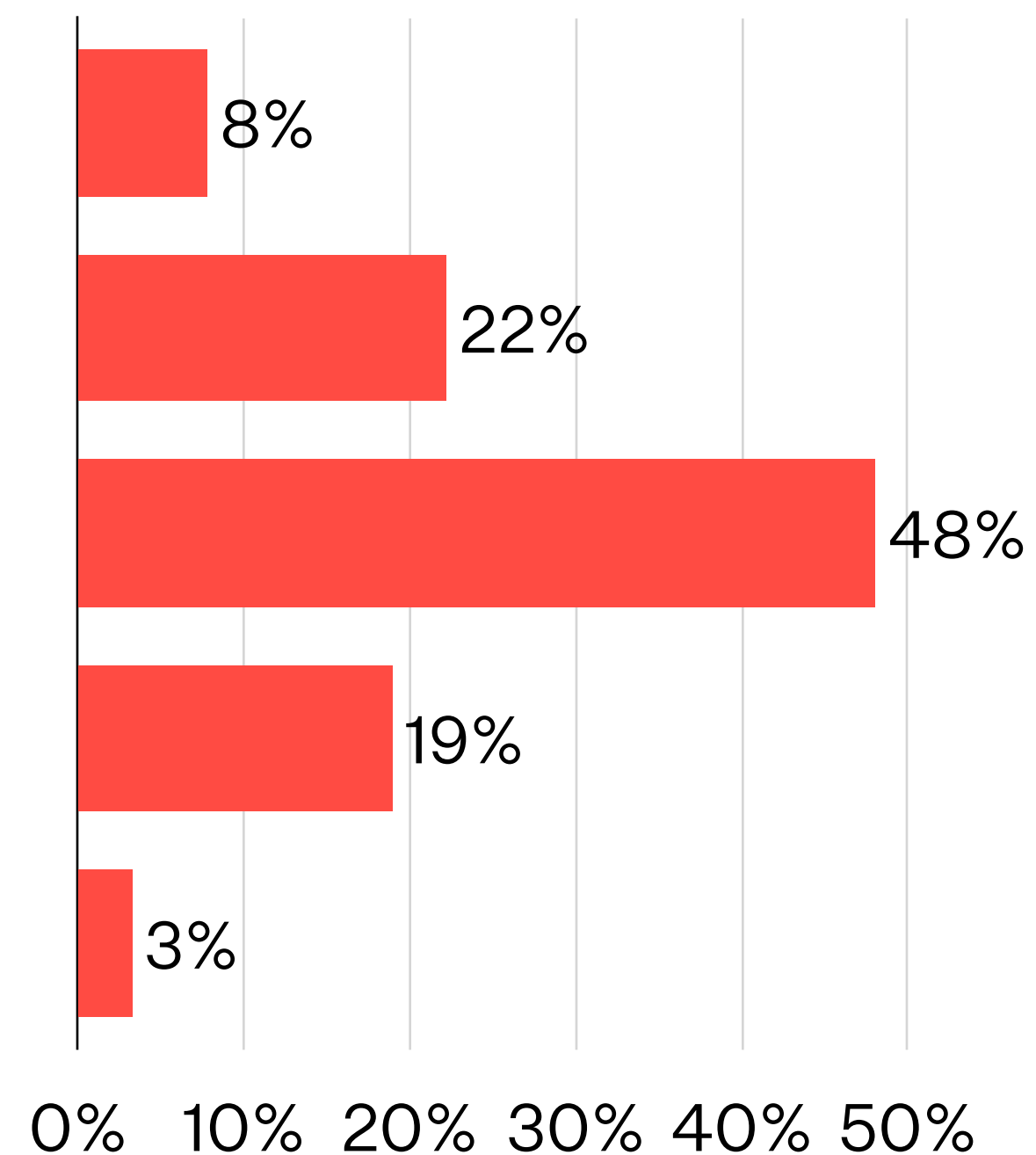


# Americans think *their* health is better than their peers' or the average person's

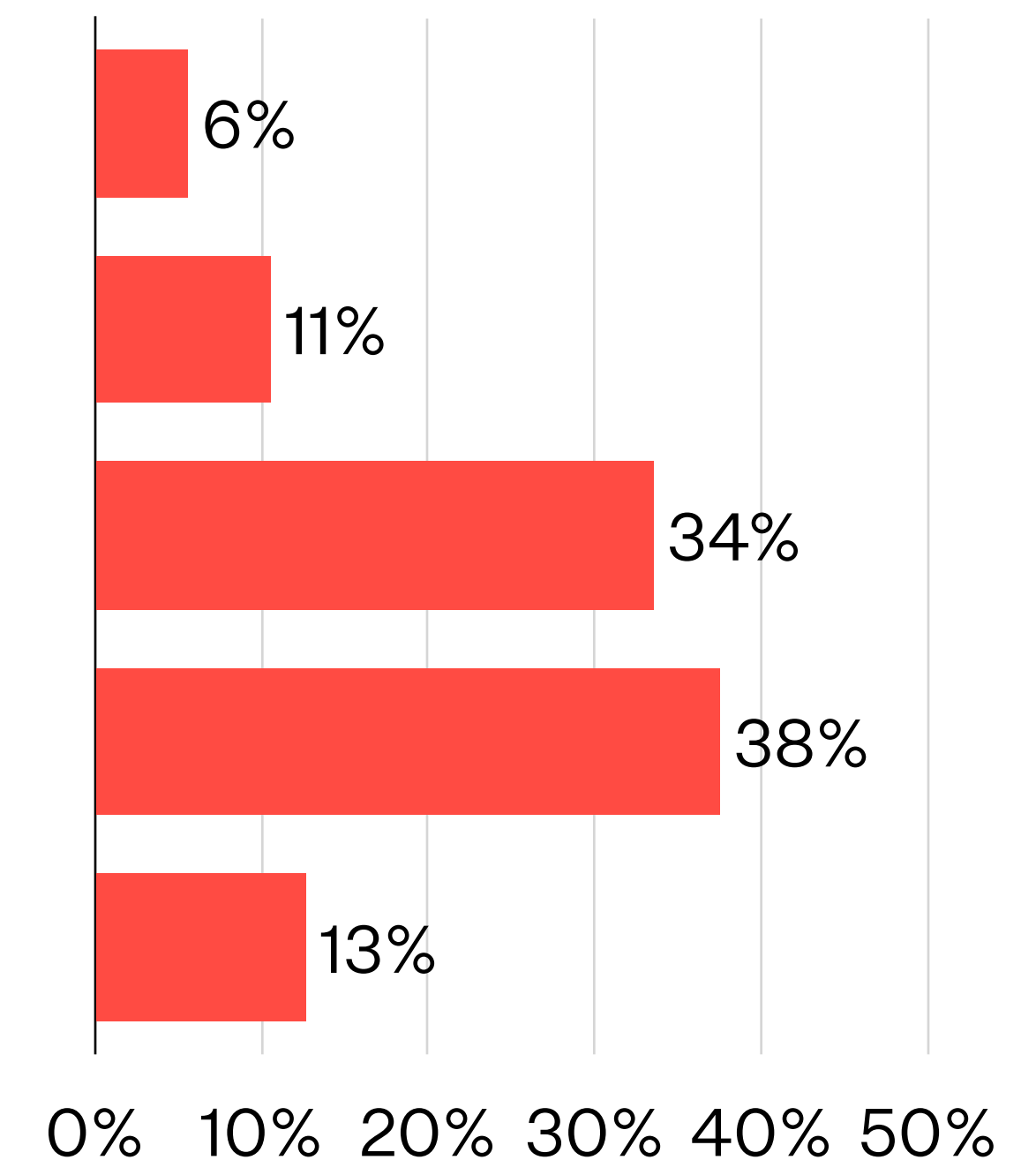
How would you rate...  
Your overall physical  
health these days?



...Your peers' health?

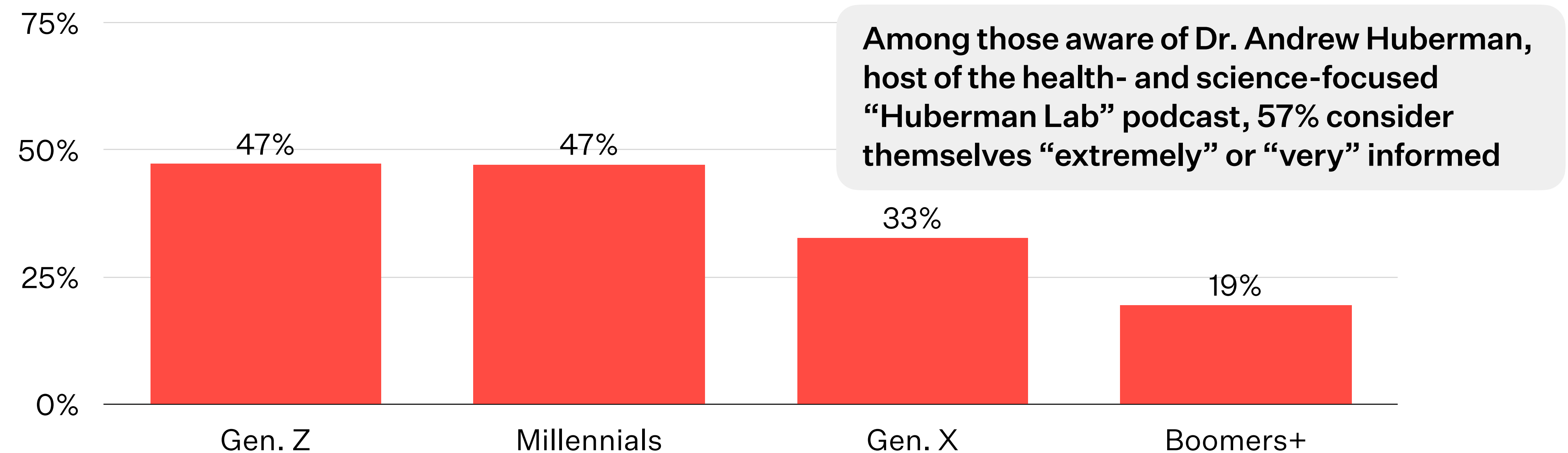


...The average  
American's health?



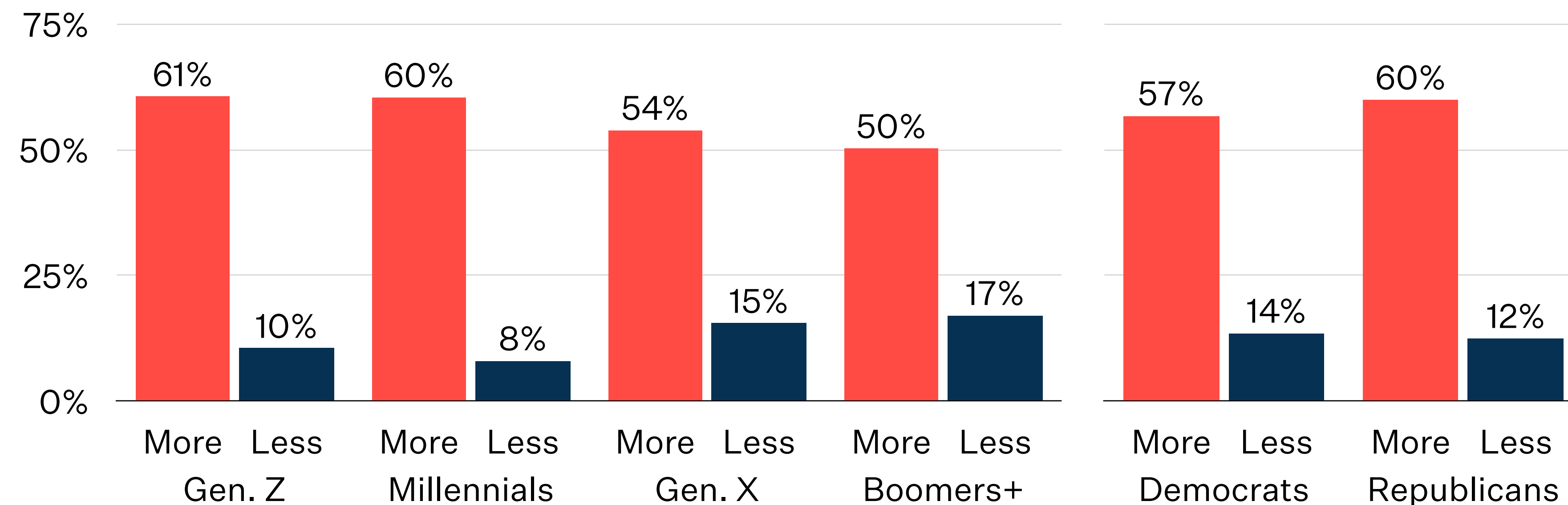
# ~Half of younger consumers consider themselves very informed about health

**Percentage of ‘Extremely’ and ‘Very informed’ responses:  
How informed do you consider yourself when it comes to new developments, research, and advice in health and wellness?**



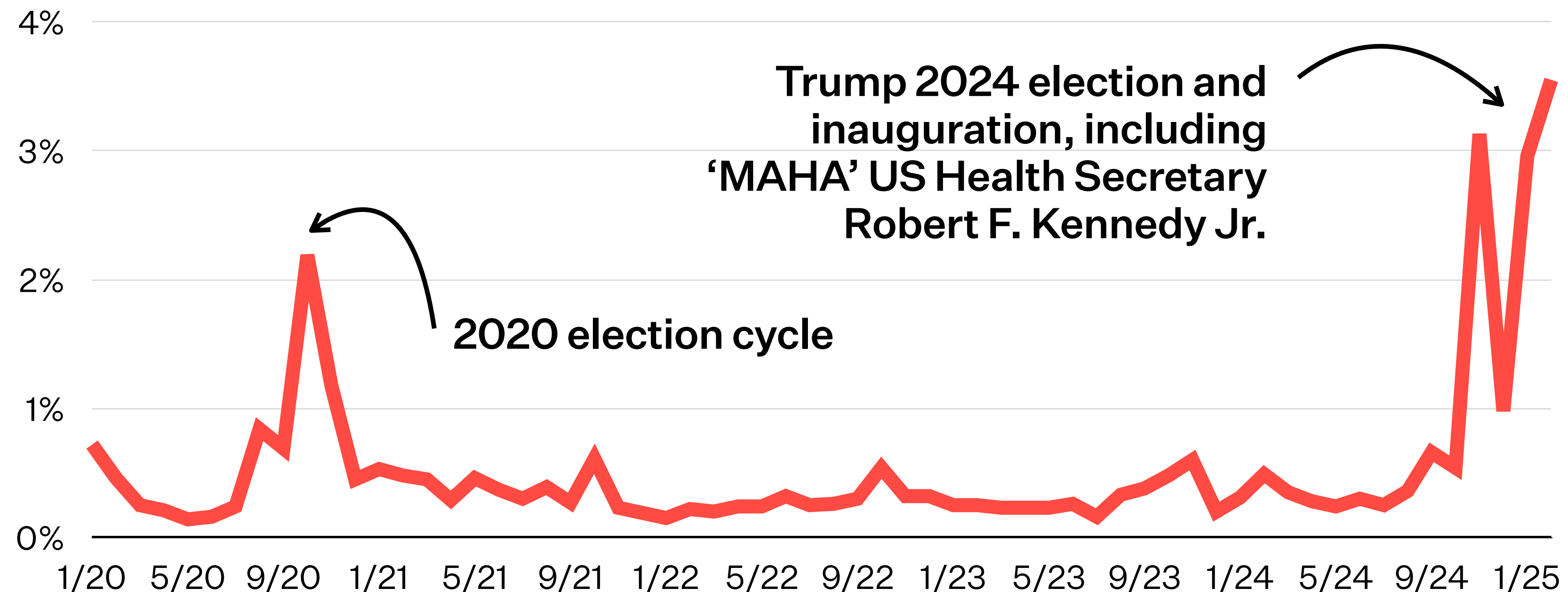
# Most Americans think the government should be more involved in our health

Percentage of responses: When it comes to Americans' health, do you think the US government should be more involved or less involved than it currently is?



# ‘Make America Healthy Again’ is in the news, in a big way

Percentage of monitored online news articles mentioning ‘Make America Healthy Again’ or ‘MAHA’





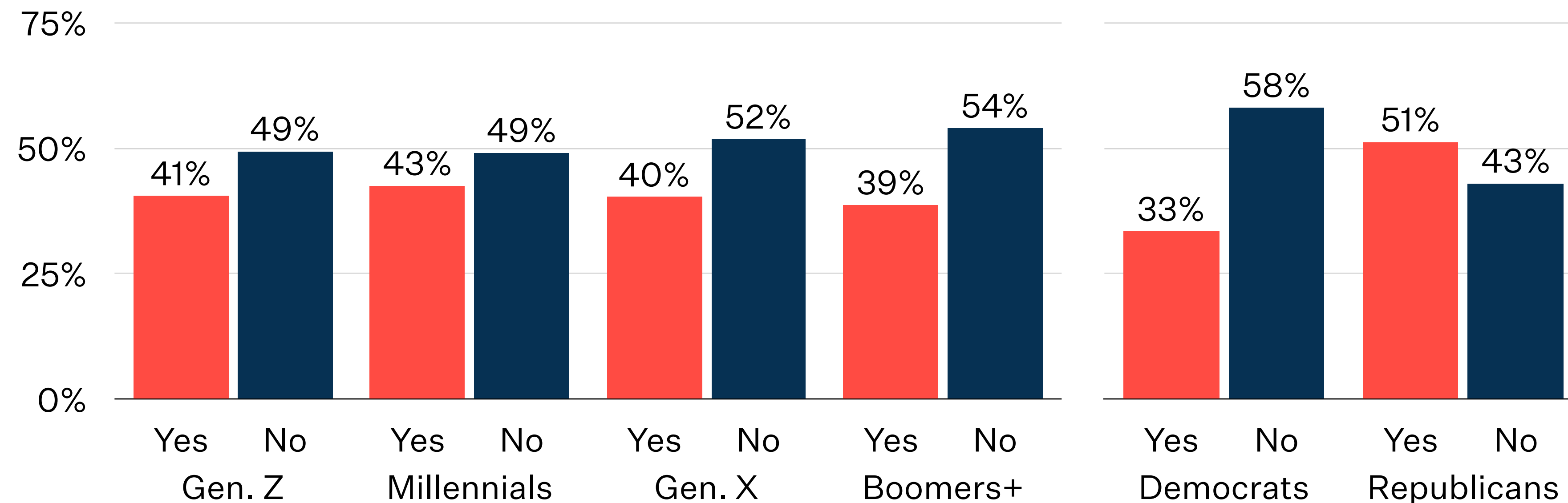
# The MAHA basics:

- “To fully address the growing health crisis in America, we must re-direct our national focus ... toward understanding and drastically lowering chronic disease rates and ending childhood chronic disease.” —White House Executive Order, Feb. 2025
- MAHA is also connected to specific, often niche health trends, such as avoiding seed oils (which some think are harmful), promoting the consumption of raw milk, and skepticism around vaccines.



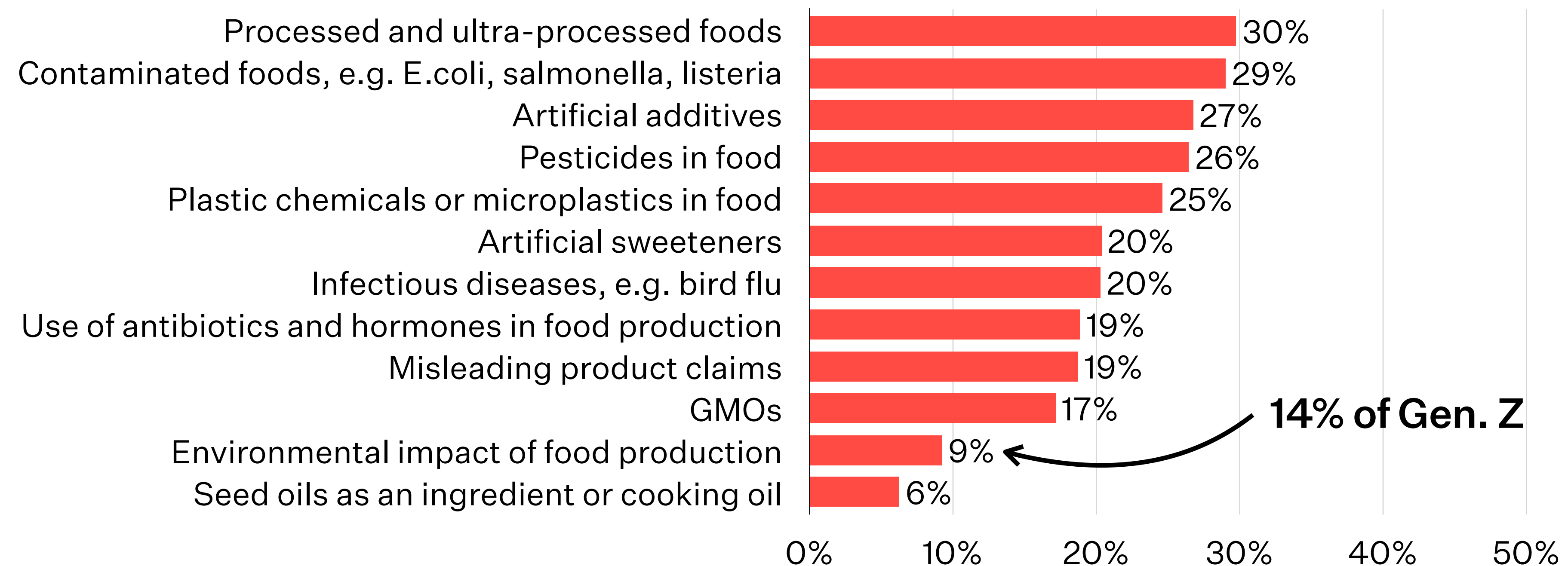
# About 40% of Americans say they're aware of the MAHA movement

Percentage of responses: Over the past few months, have you seen, read, or heard any news or discussion about a movement called MAHA – Make America Healthy Again?



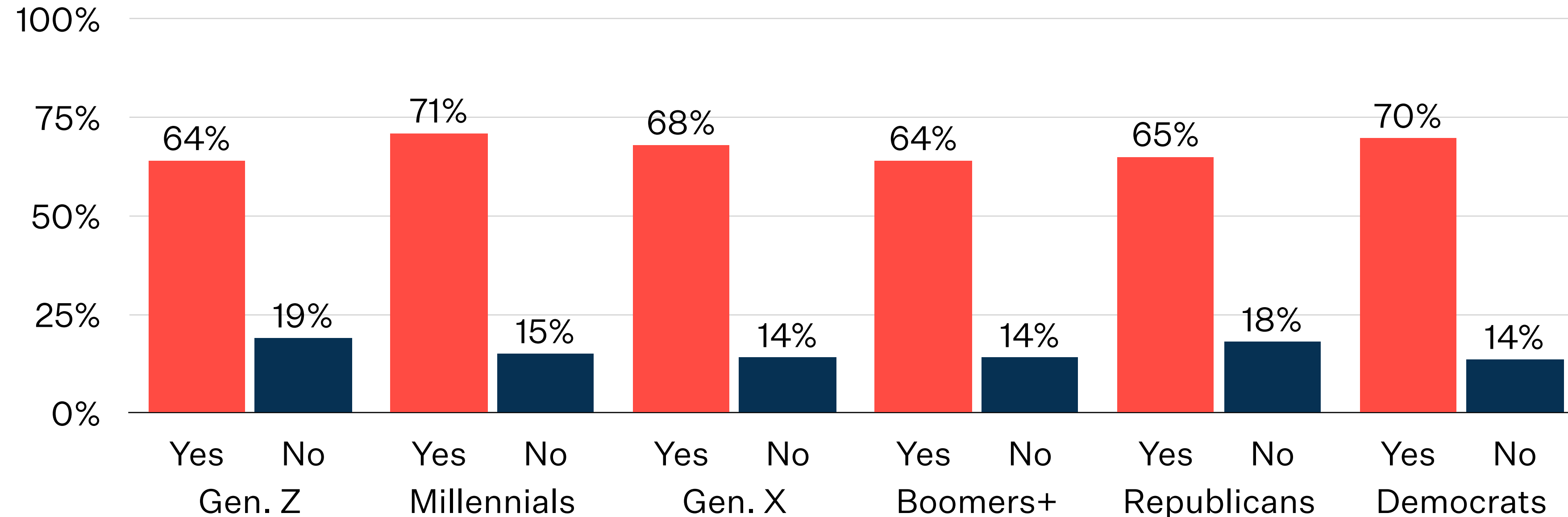
# What *are* consumers' top food-health concerns? Processing, contamination

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



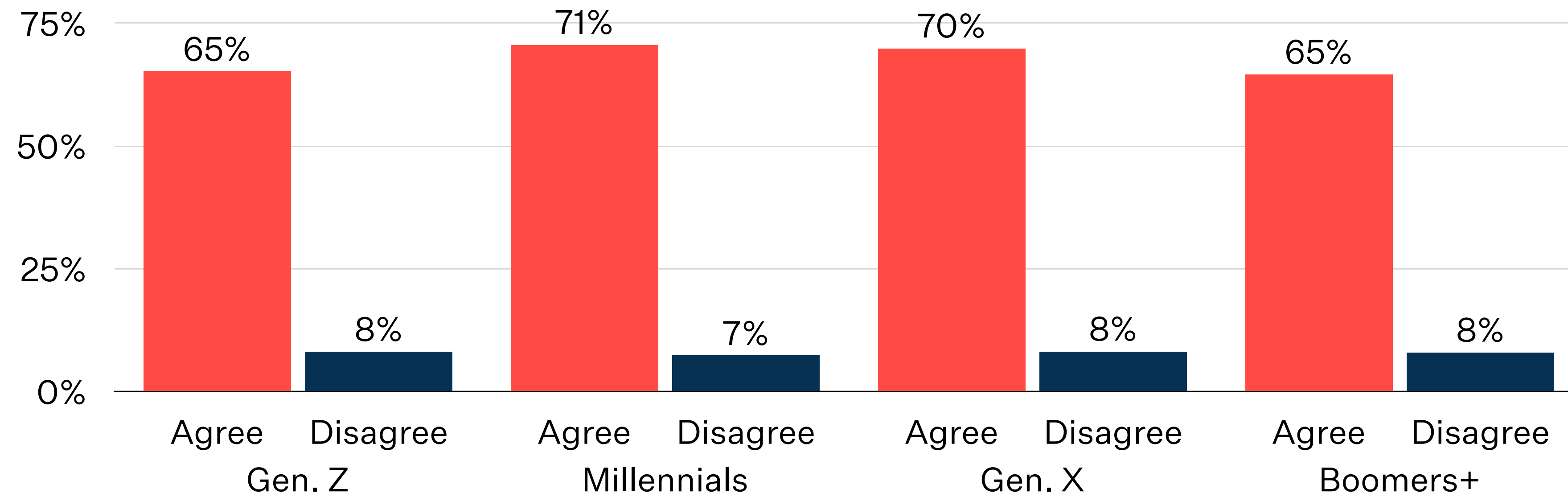
# Most Americans believe the government has a responsibility to regulate ultra-processed food

Percentage of responses: Does the US government have a responsibility to regulate ultra-processed food?



# Most Americans agree: Food is medicine

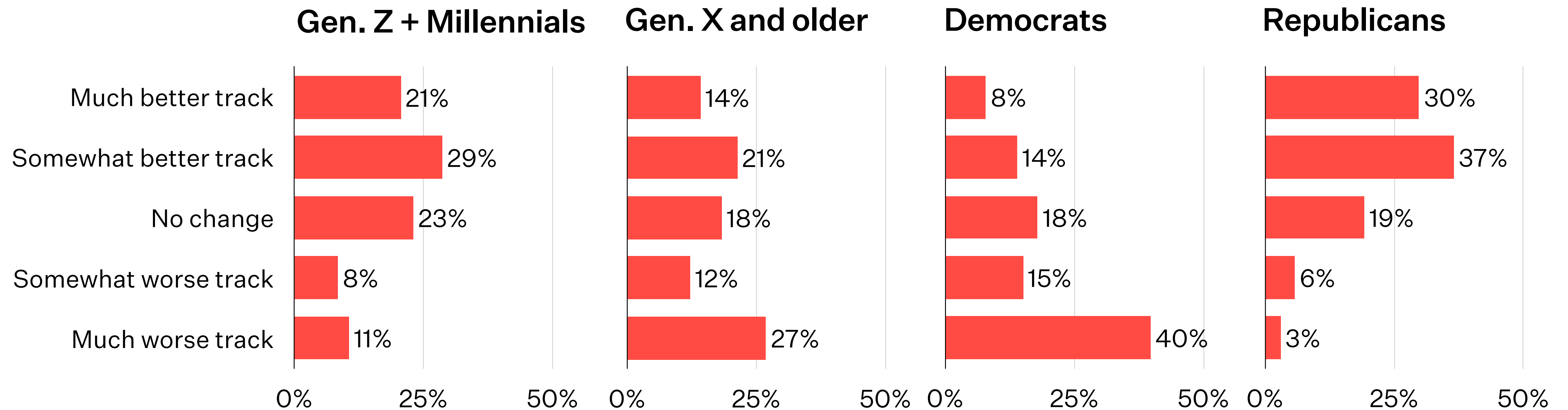
Percentage of 'Agree' or 'Disagree' responses: Please indicate how strongly you agree or disagree with the following statement: 'Food is medicine.'



**Among those aware of Dr. Andrew Huberman, 47% “strongly agree,” vs. 27% overall**

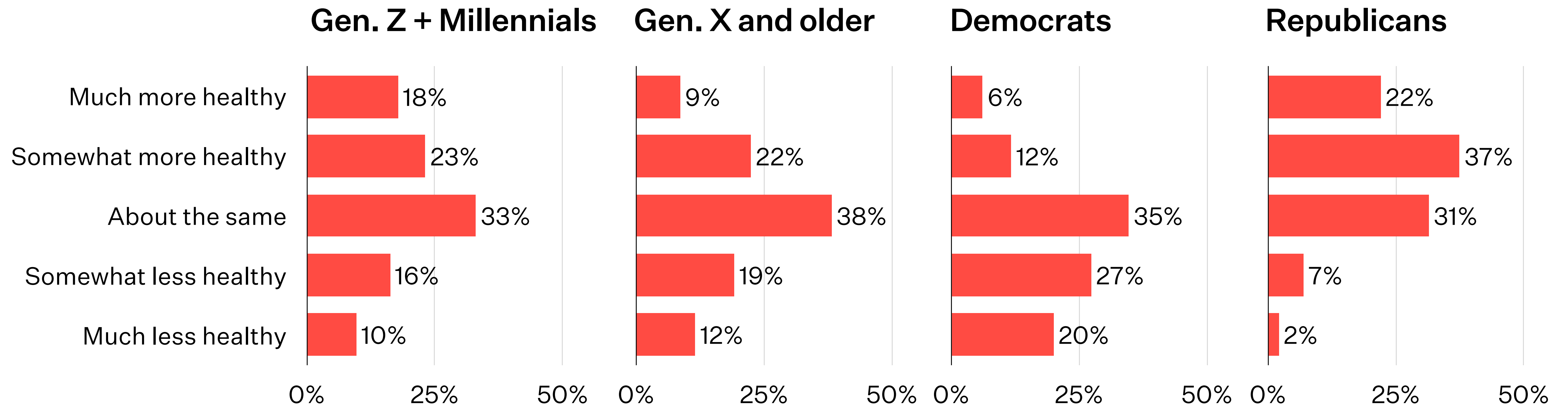
# Younger Americans and Republicans are more optimistic about RFK Jr.

As a result of RFK Jr.'s actions and policies in this role, do you think the average American's health will be on a...



# Will Americans be healthier in four years? That's largely a political question

In four years, do you think the average American will be physically more healthy or less healthy than today?



2

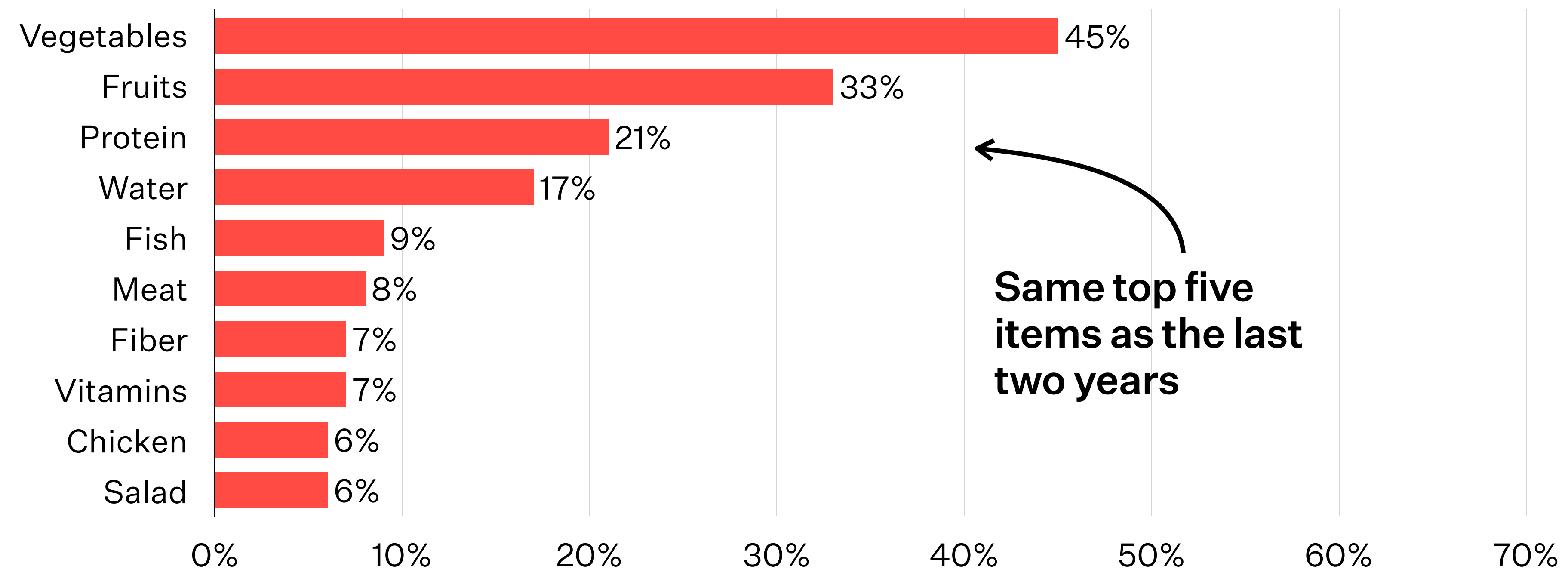
What do consumers say  
they want to eat?

What are they  
actually eating?



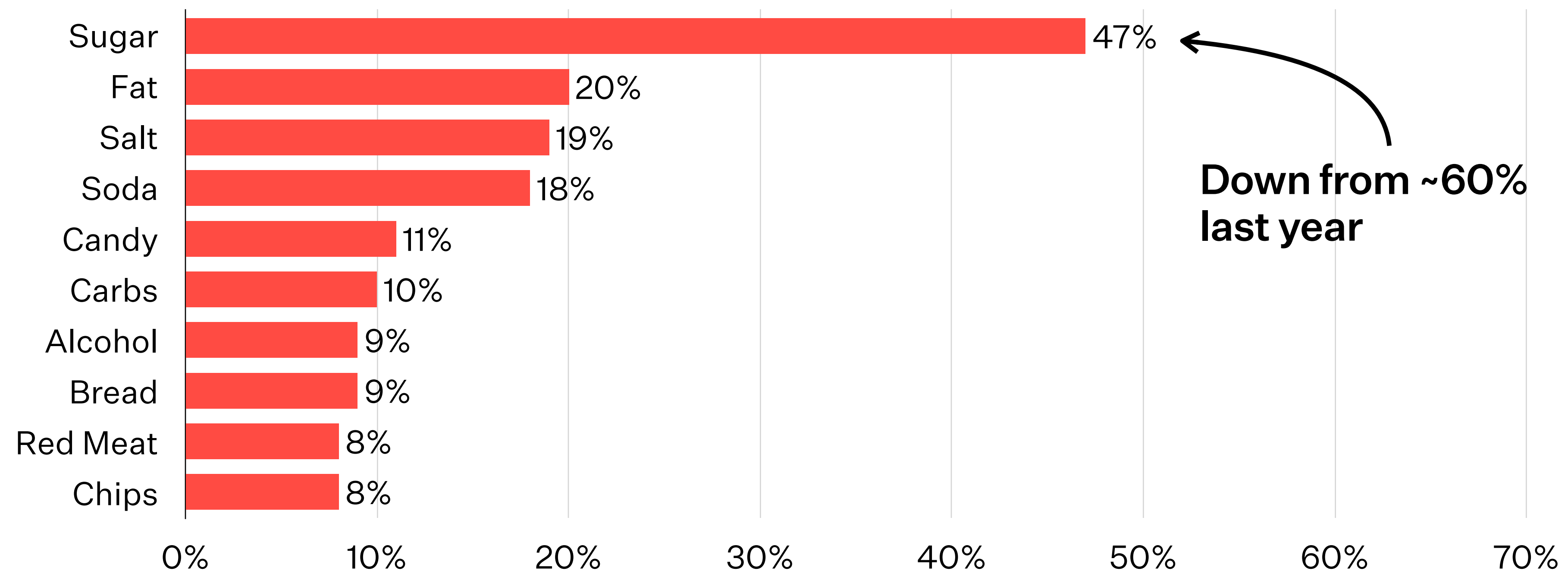
# We asked 3,000+ Americans what they want to consume *more* of this year...

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



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

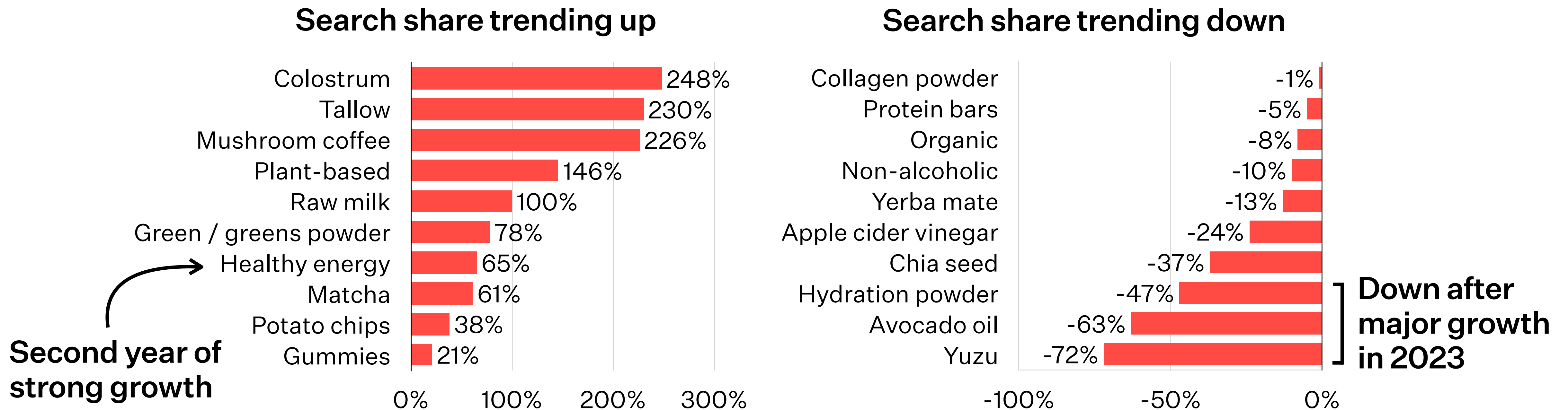
Percentage of respondents writing in each specific term  
(Submit three.)



# What's trending on Instacart?

## We looked at 20 search terms of interest

Year-over-year change in share of total Instacart searches containing specific food and beverage terms, 2024



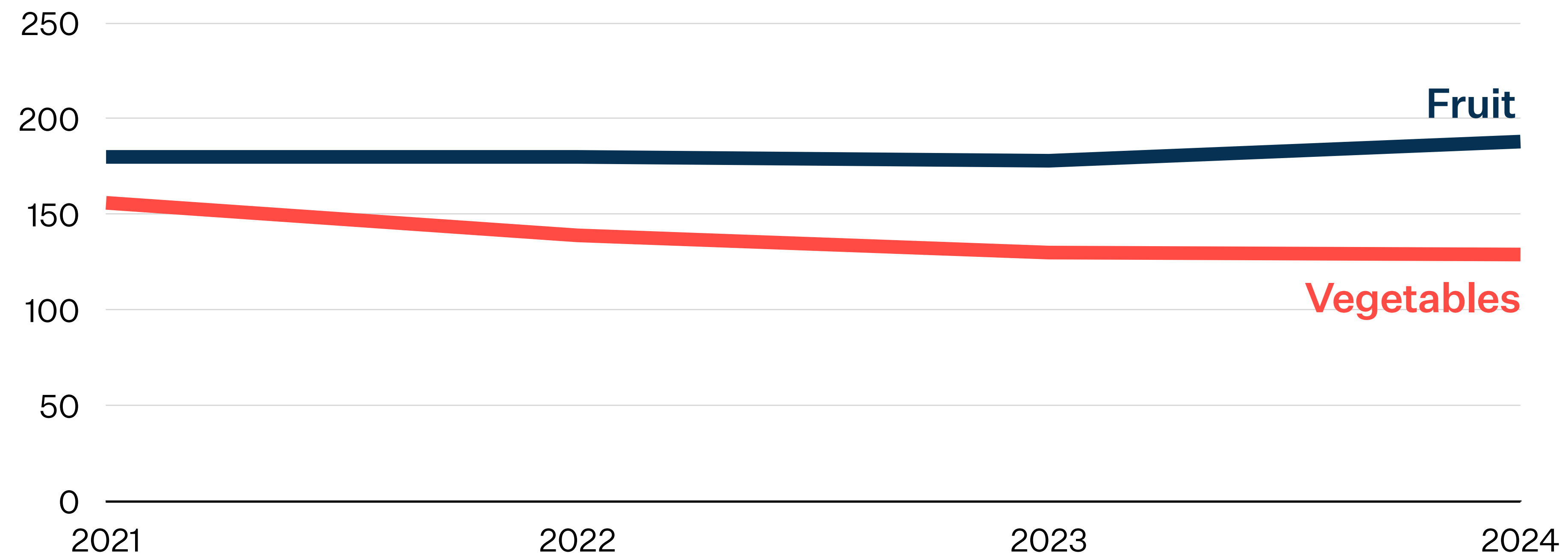
# Instacart’s largest growth categories for 2024 were fruits and vegetables

Categories ranked by the highest absolute increase in item share, US Instacart baskets in 2024

1	Root vegetables	11	Stone fruit
2	Citrus	12	Meat jerky
3	Berries	13	Cottage cheese
4	Grapes	14	Greek and Icelandic yogurt
5	Bananas	15	Frozen poultry
6	Tomatoes	16	Ground beef
7	Cucumbers	17	Bell peppers
8	Fresh herbs	18	Leafy vegetables
9	Avocados	19	Coffee creamers
10	Candy	20	Celery

# People say they want to eat more vegetables, but actual consumption is dipping (while fruit snacking grows)

Annual eatings per capita (US)



# Eggs have officially dethroned milk as the top-searched term on Instacart

## Top Instacart search terms and change in rank by year

2021			2022			2023			2024		
1	Milk		1	Milk		1	Milk		1	Eggs	+1
2	Bread	+2	2	Eggs	+1	2	Eggs		2	Milk	-1
3	Eggs		3	Bread	-1	3	Bread		3	Bread	
4	Cheese	+2	4	Water	+1	4	Water		4	Water	
5	Water	+8	5	Chips	+1	5	Chips		5	Chips	
6	Chips	+8	6	Chicken	+2	6	Butter	+3	6	Tomato	+2
7	Tomato	+8	7	Cheese	-3	7	Cheese		7	Ground beef	+3
8	Chicken	-3	8	Ground beef	+3	8	Tomato	+2	8	Chicken	+1
9	Butter	-2	9	Butter		9	Chicken	-3	9	Cheese	-2
10	Ice cream		10	Tomato	-3	10	Ground beef	-2	10	Butter	-4

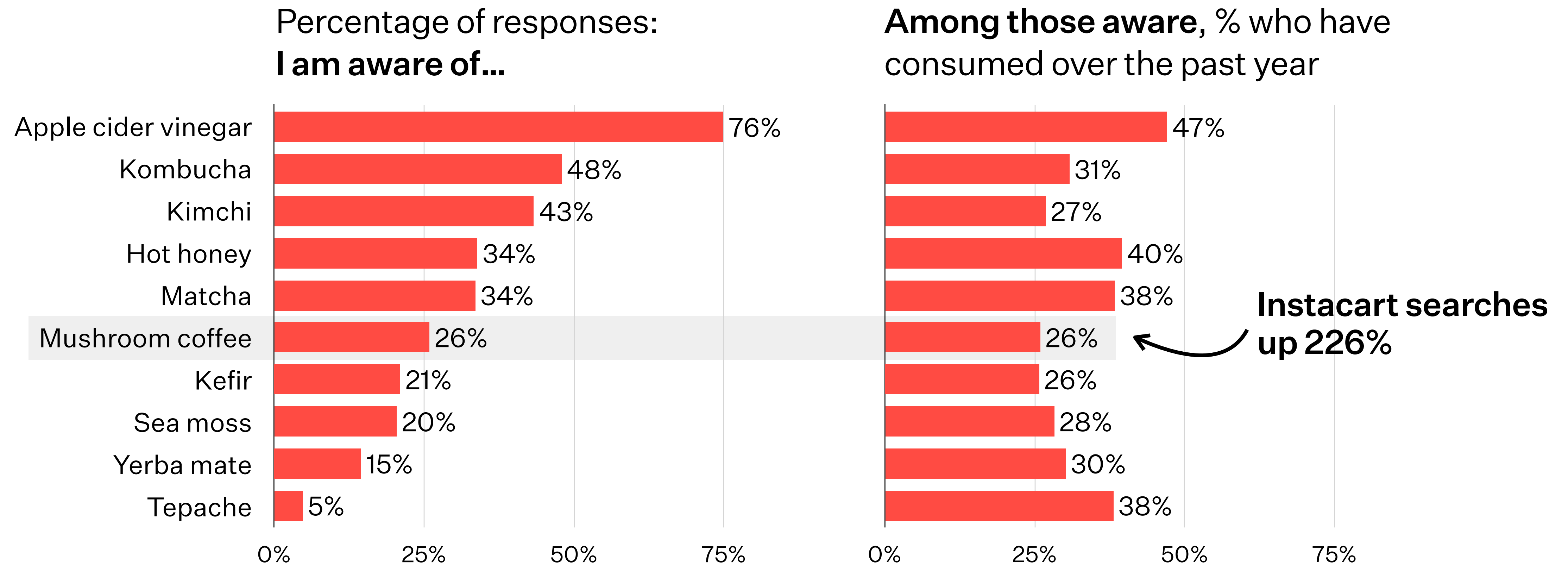
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The 'functional' beverage boom  
has given rise to things like  
mushroom coffee and prebiotic soda.

What do consumers really think?



# Mushroom coffee is approaching matcha levels of awareness

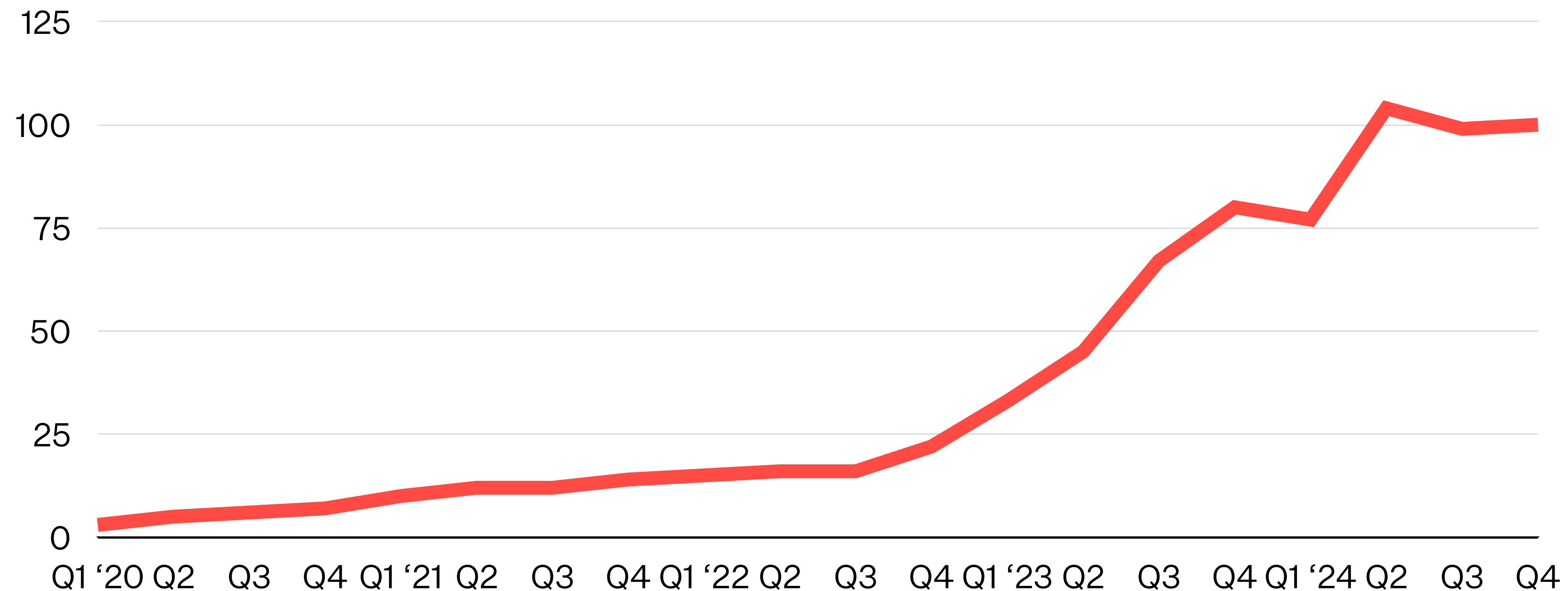


# The mushroom coffee basics:

- Mushroom coffee typically combines instant coffee powder with a blend of functional mushrooms, such as Lion's mane, Chaga, Reishi, and Cordyceps
- Brands promise “jitter-free energy” with lower caffeine and better moods, gut health, and immunity
- And a “nutty” aroma with “rich” or “robust” flavor
- We estimate the top three mushroom coffee brands are doing more than half a billion dollars in sales, combined

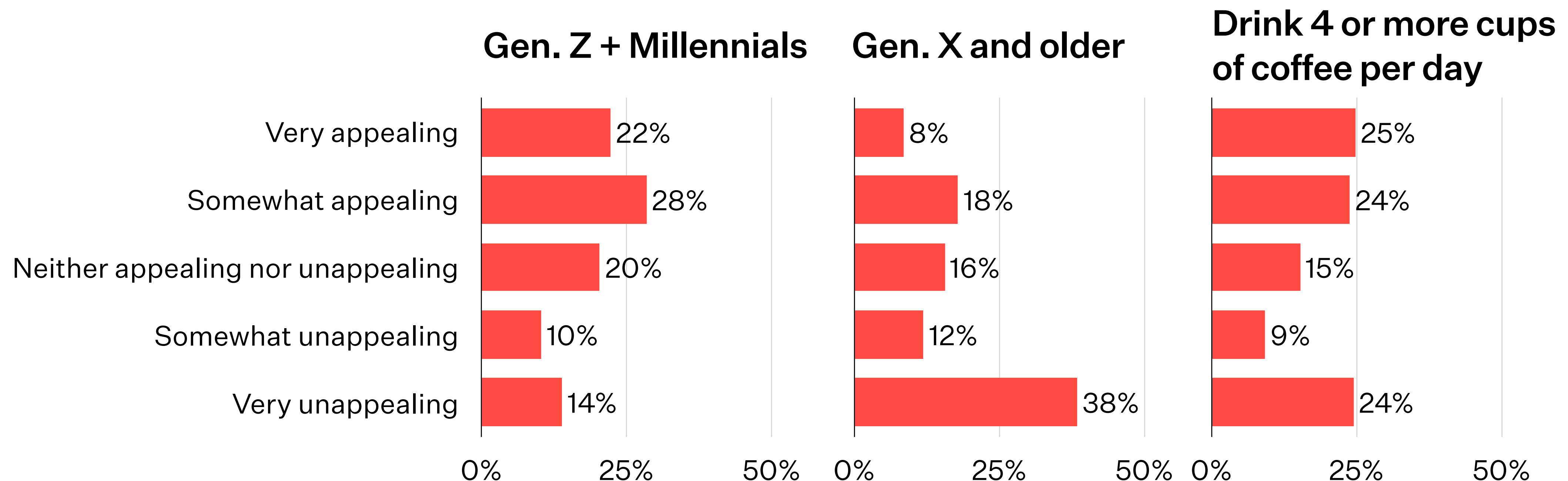
# DTC sales for four mushroom coffee brands have quadrupled in two years

Indexed US direct-to-consumer sales for a basket of four mushroom coffee merchants — Earnest Analytics



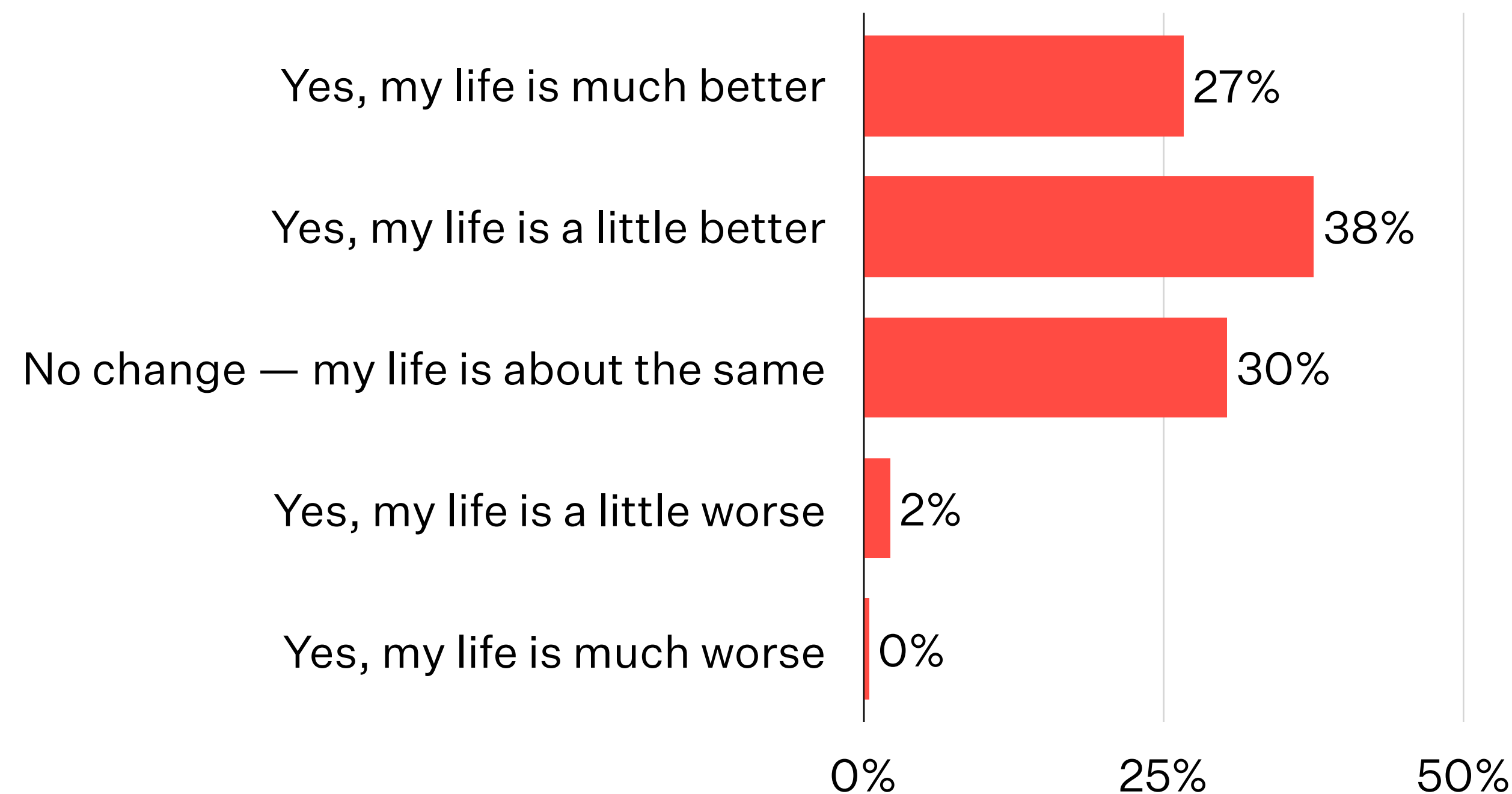
# Millennials and big coffee drinkers find mushroom coffee most appealing

Percentage of responses: How does the concept of mushroom coffee appeal to you?



# Early adopters say mushroom coffee has made their lives better

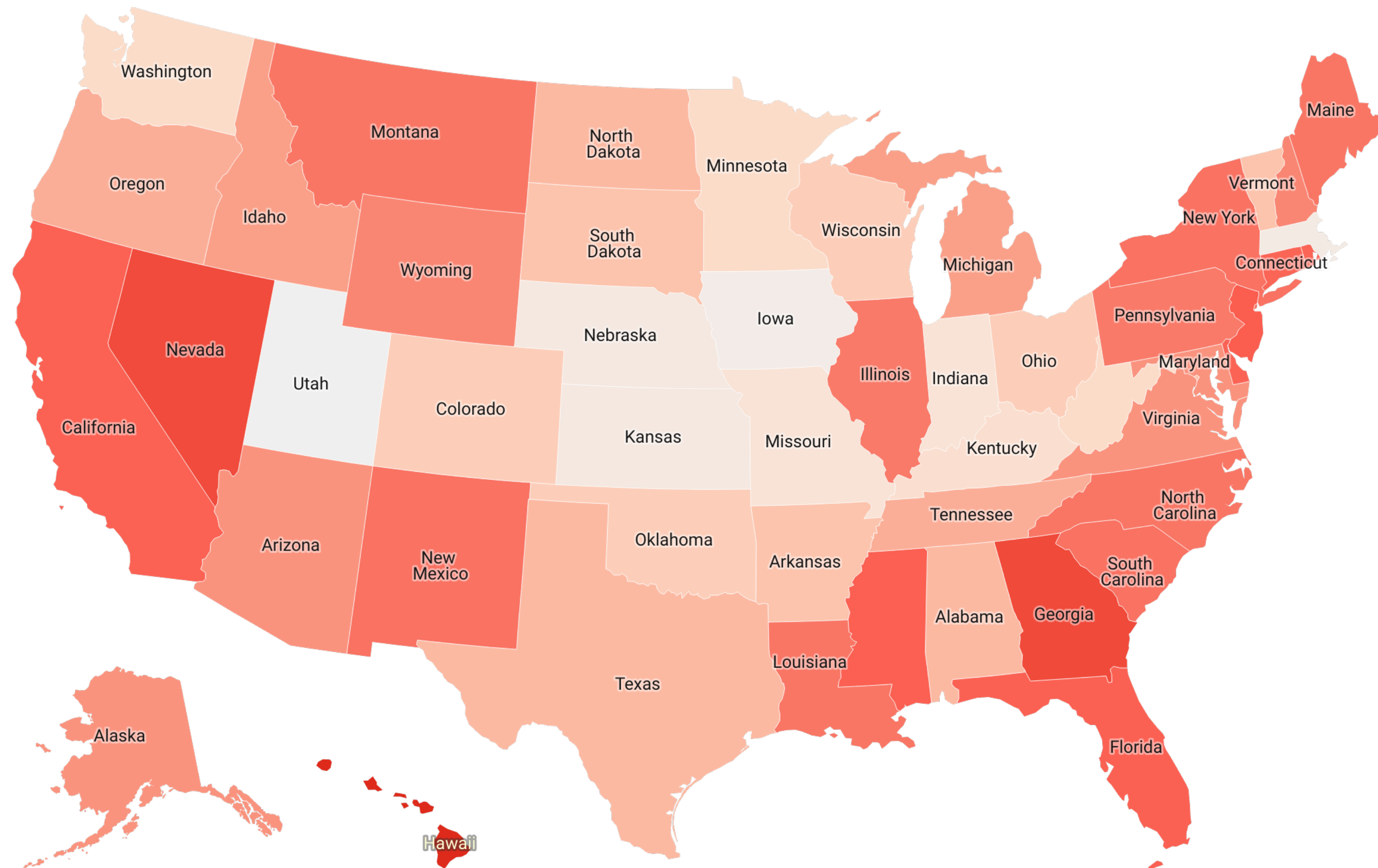
Percentage of responses: You said you've consumed mushroom coffee. Overall, has it changed your life?



**Among those who say they've consumed mushroom coffee over the past year: 41% say it tastes great, 38% say it tastes good, and 17% say it tastes fine. Just 4% say it tastes poor.**

# The mushroom coffee map

In 2024, Google search interest in mushroom coffee overindexed in Hawaii, the West, and the East Coast

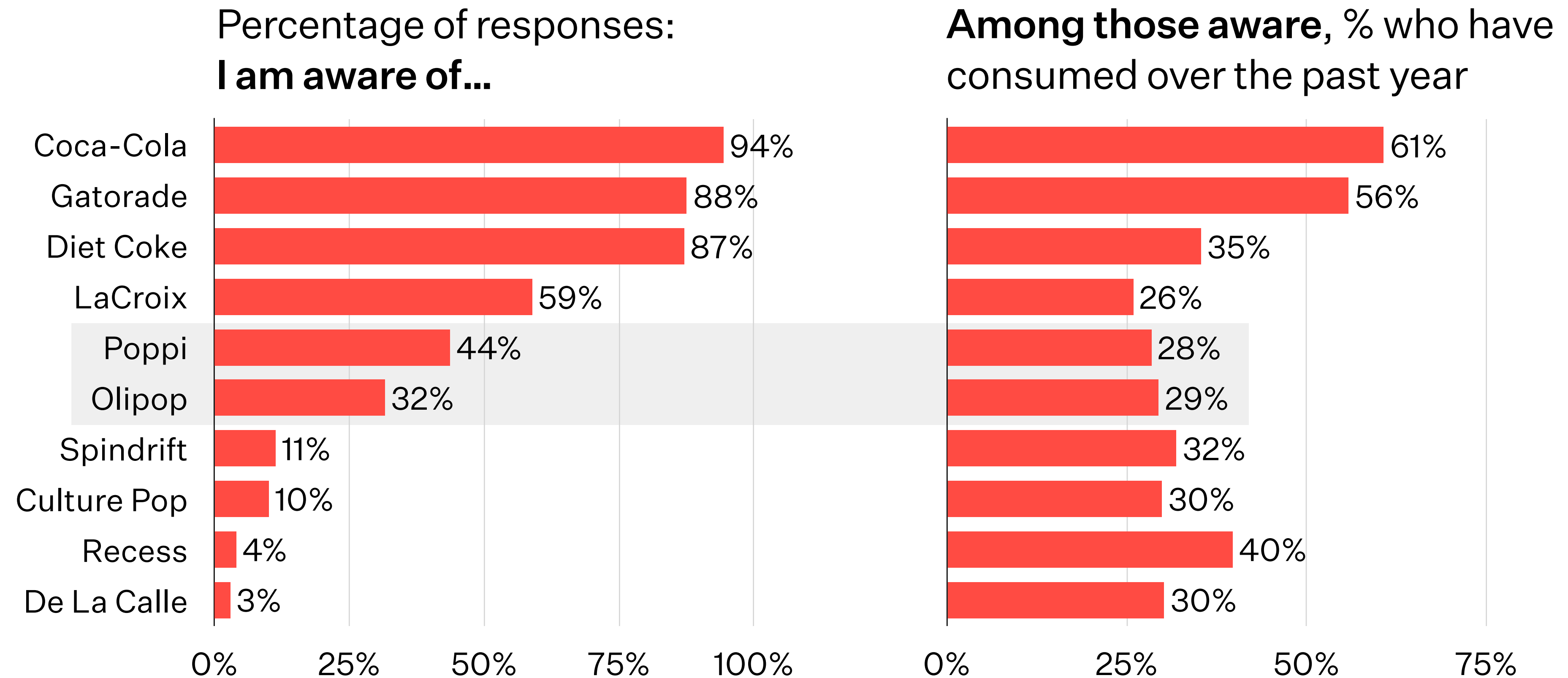


Data: Google Trends, Datawrapper. Darker shading means a greater relative share of Google searches in that state.

The New Consumer | Coefficient



# Awareness of 'healthier' soda like Poppi and Olipop is approaching mass levels





# We asked 3,294 consumers to rate...

Which of these drinks do you think is **more healthy**?

Which of these drinks do you think **tastes better**?



# Among the thirsty 84 who've had all four...

Which of these drinks do you think is **more healthy**?

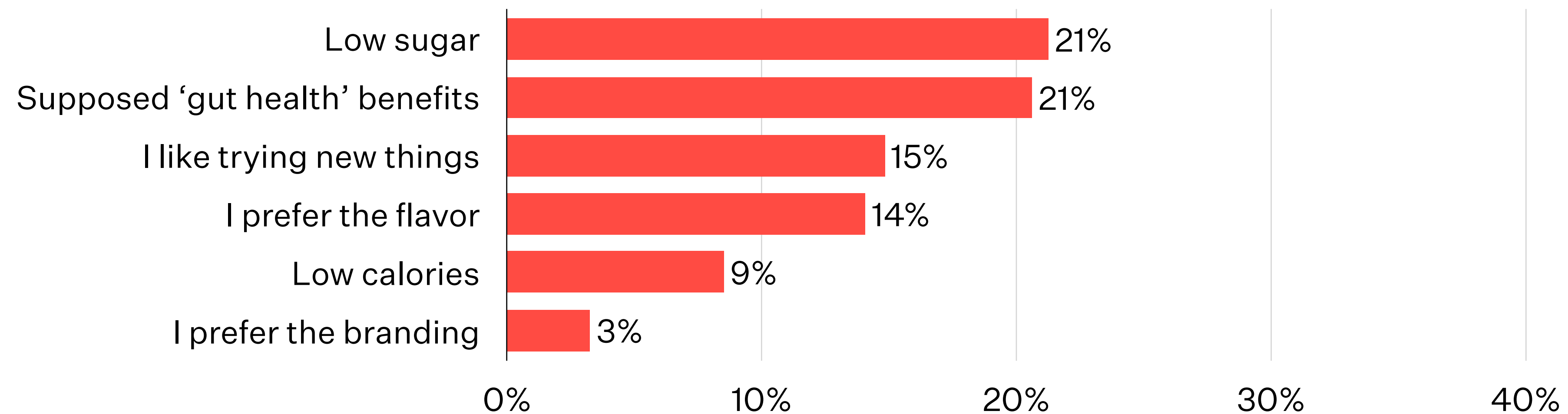


Which of these drinks do you think **tastes better**?



# Consumers say low sugar and ‘gut health’ are the most important factors in purchasing a modern soda brand

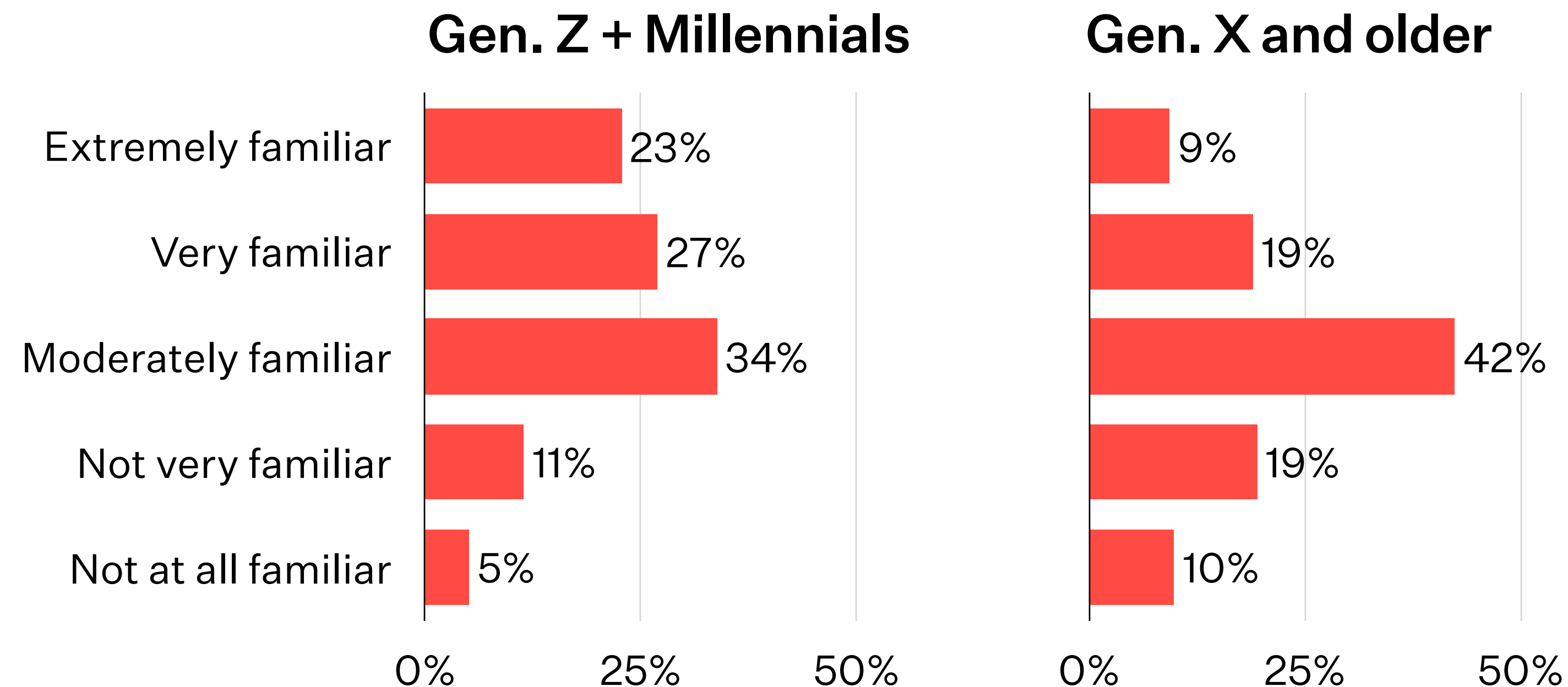
Percentage of responses: If you were to buy [a modern soda brand] at a grocery store, among these, what is the one most important reason why?





# Younger consumers say they're more familiar with the concept of 'gut health'

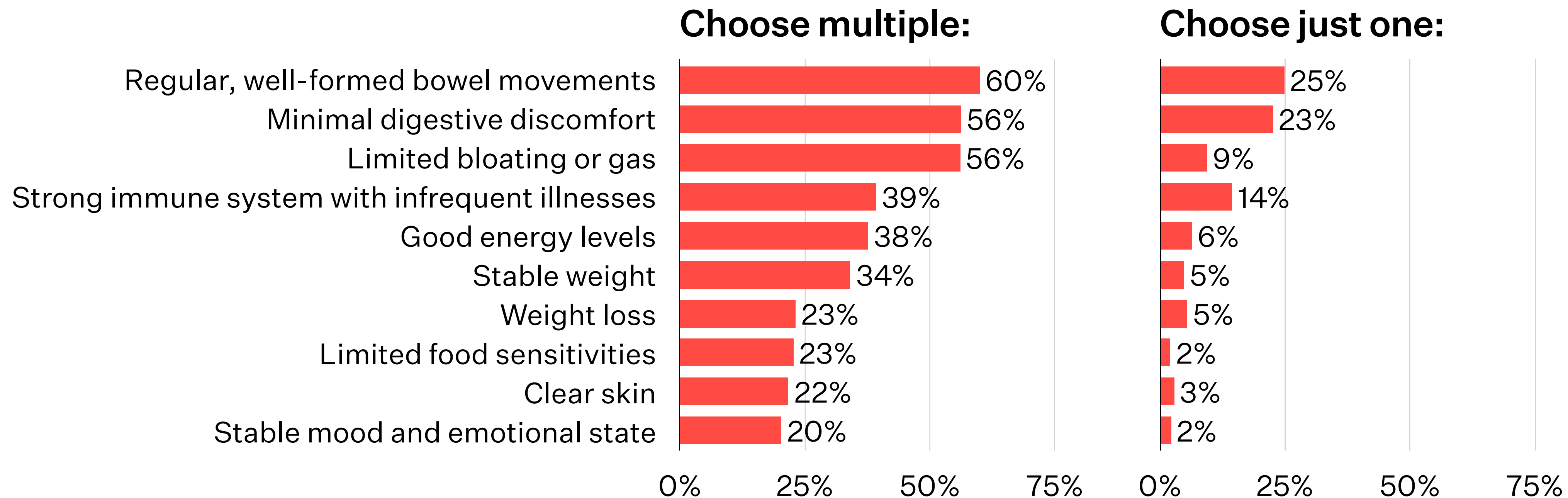
Percentage of responses: How familiar are you with the concept of 'gut health'?



# What does 'gut health' really mean?

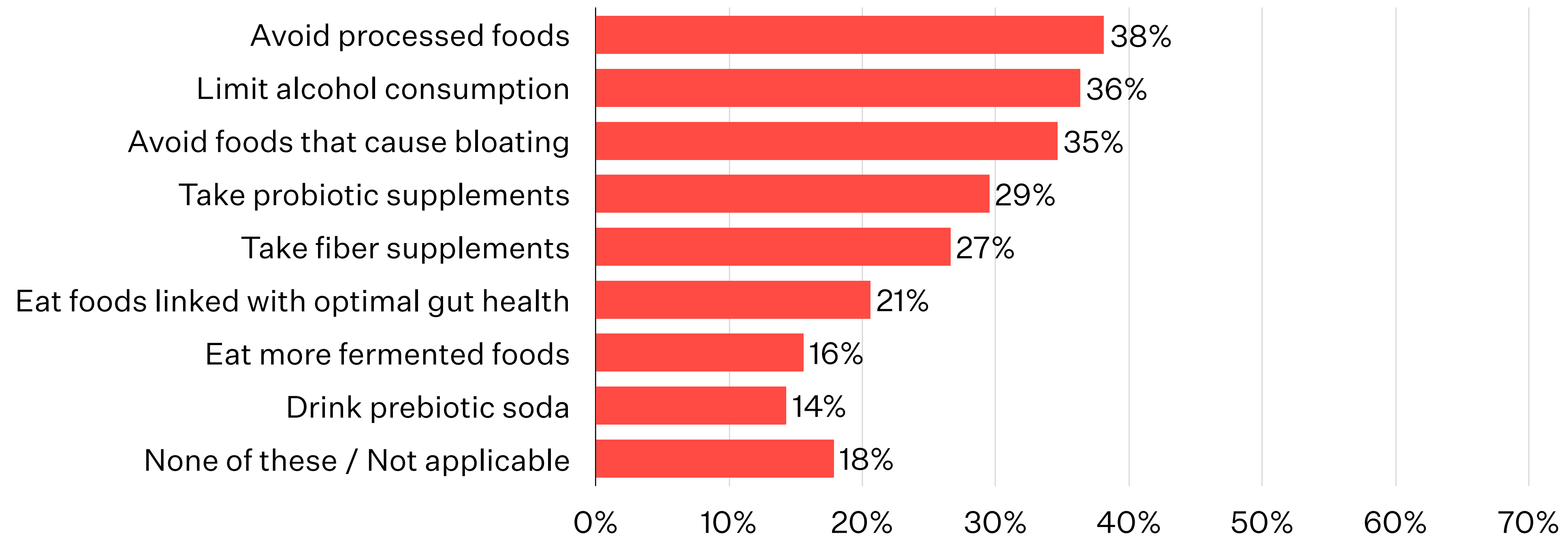
## Good poops and minimal discomfort

Percentage of responses: What do you think it means to have good gut health?



# To improve or maintain gut health, consumers take a mixed approach

Which, if any, of the following things do you do specifically to improve or maintain your gut health?



# 4

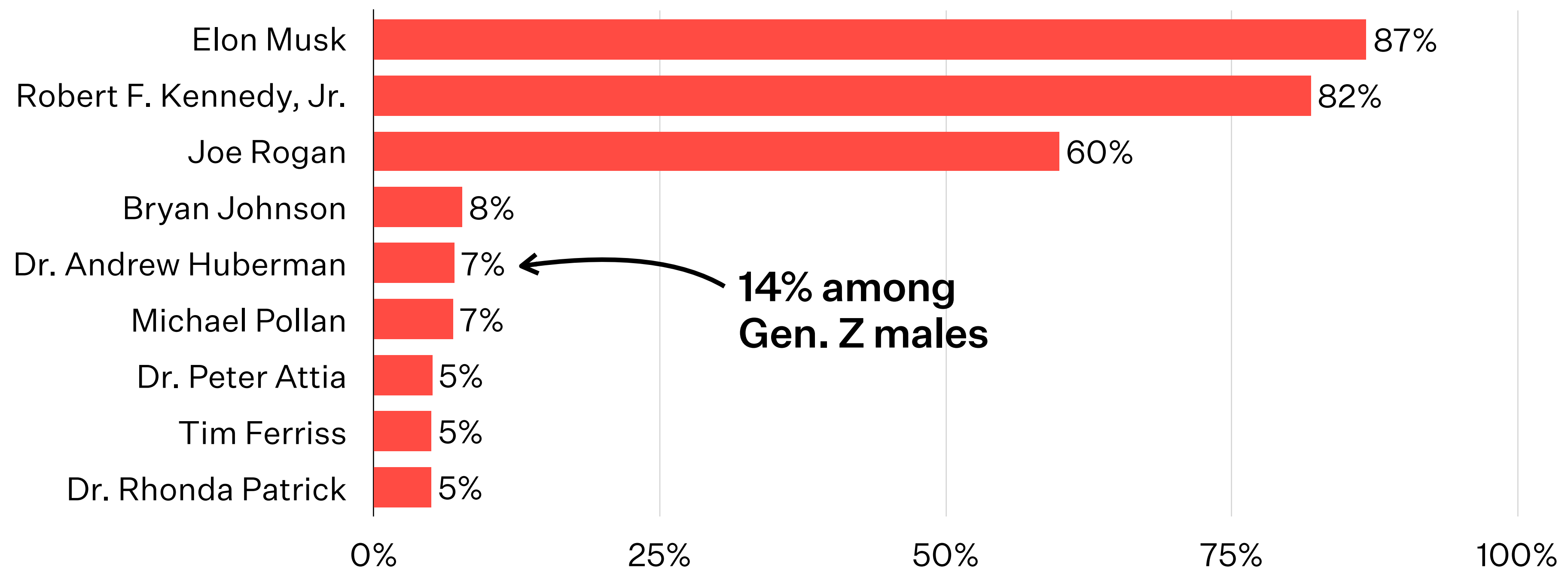
Seed oils have emerged  
as a hot topic among the  
health-concerned.

Is this real science or  
TikTok science?



# We're deep in the influencer era when it comes to health knowledge and policy

Percentage of responses: Which, if any, of the following people are you aware of?



# The seed oil basics:

- Inexpensive “seed oils” (soybean, canola, vegetable, etc.) have been increasingly discussed as being toxic, inflammatory, and even blamed for America’s health crisis and the rise in chronic disease
- Seed oils are everywhere, but especially in processed, packaged food and fried food that’s already not particularly healthy
- Health and wellness influencers — ranging in credibility and reach — are the loudest voices here

# The anti-seed oil thinking:

- People who think seed oils are “toxic” cite claims such as that their omega-6 fatty acids cause excessive inflammation
- They believe industrial processing of seed oils creates harmful compounds and oxidation that damage cells
- They claim that seed oils supposedly contribute to chronic diseases like heart disease, obesity, and cancer due to both their composition and processing methods

# The scientist's rebuttal:

- Zoe's chief scientist Sarah Berry, whose research focus includes the impact of different fats and oils on cardiovascular health, says it's "absolute nonsense"
- In a lengthy podcast episode, she debunks the most common claims, citing scientific research
- For example: Some seed oils, in some quantities, can actually be helpful; omega-6 fatty acids don't cause inflammation; and processing oils doesn't create toxins

# The seed oil situation:

- The US FDA considers seed oils generally safe
- We'll see if the government changes its stance under health secretary RFK Jr., who's said that "seed oils are one of the most unhealthy ingredients that we have"
- The truth is that, in an era where influencers are often more trusted than institutions, it's hard for consumers to *really* know
- There's a lot of noise here, and there's not much room for detail or nuance on TikTok or Reels

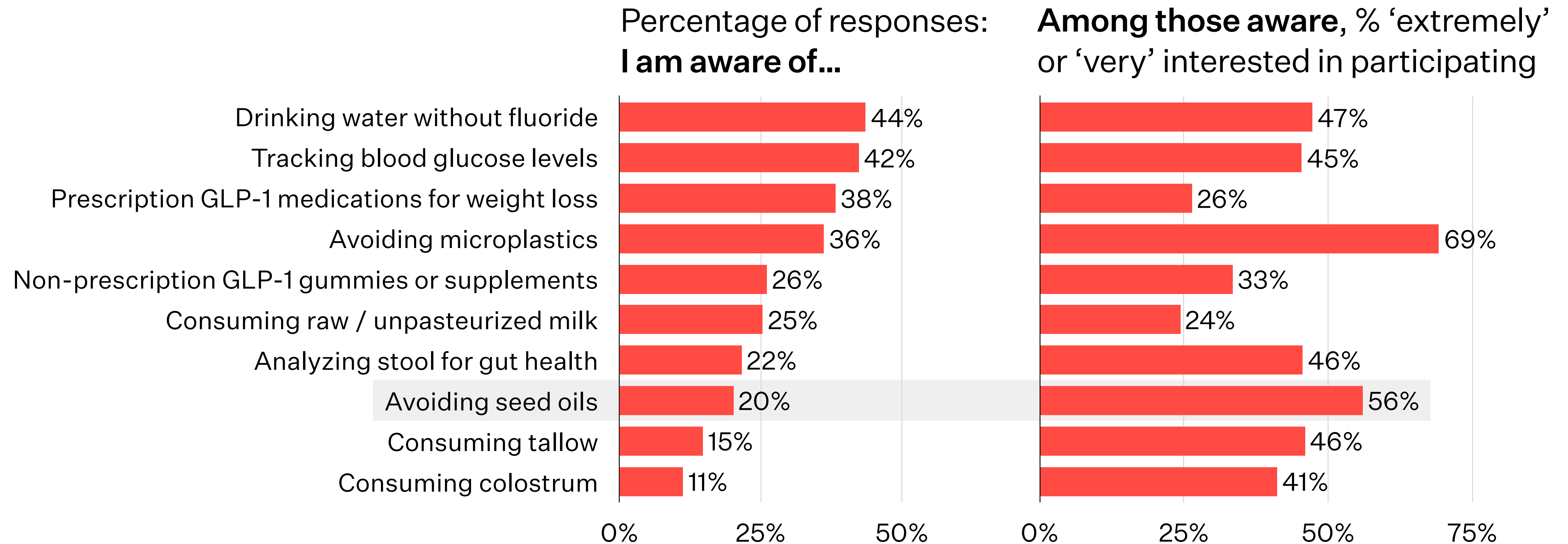
# Americans are increasingly searching for information about seed oil

Indexed Google web search volume, US, 3-month trailing average





# The seed oil phenomenon has relatively low awareness but high intent





# Those who consider themselves 'extremely informed' about health research have more negative views on seed oils

"Seed oils are toxic and I never knowingly consume them"

24% 7%

'Extremely informed' Overall

"Seed oils are pretty bad and I try to avoid them whenever possible"

27% 17%

'Extremely informed' Overall

"Seed oils are fine in moderation and I don't pay much attention to whether they're in my food"

21% 34%

'Extremely informed' Overall

"There is no evidence that seed oils are harmful and I don't pay any attention to whether they're in my food"

11% 16%

'Extremely informed' Overall

# The seed oil upshot:

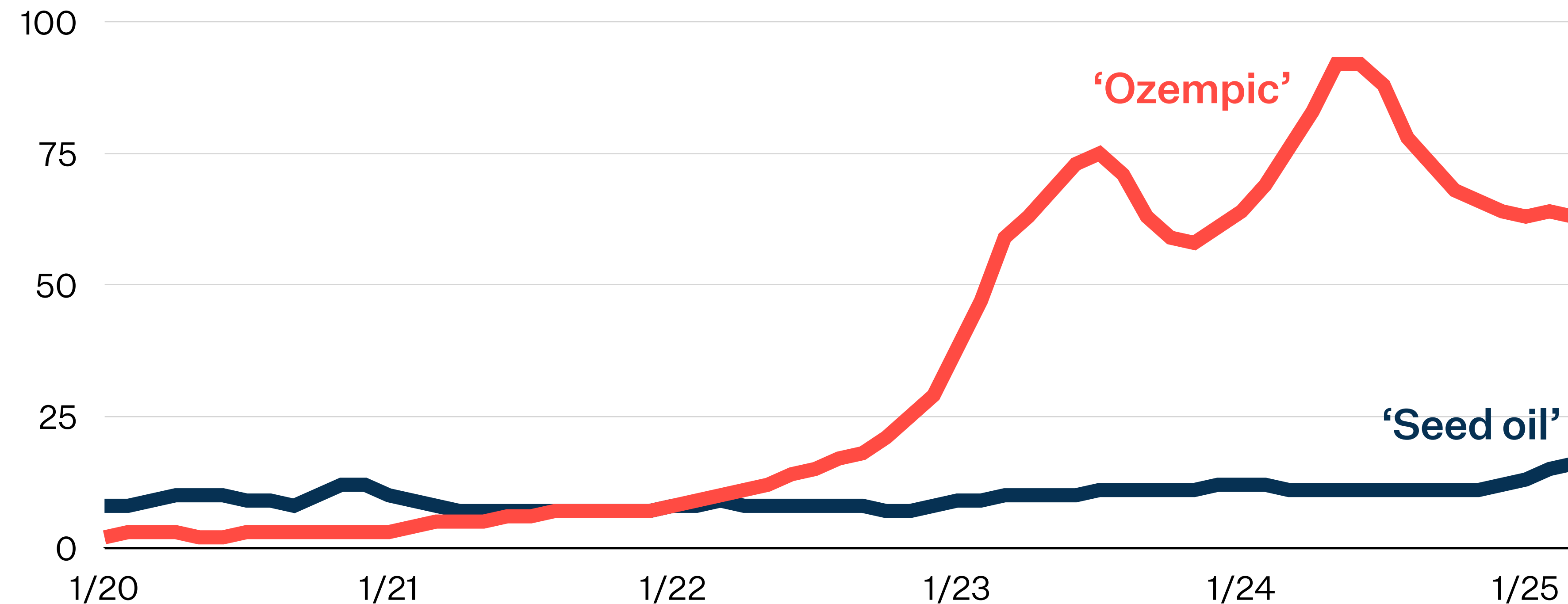
- Some brands have capitalized on the trend, such as the salad chain Sweetgreen, which has marketed “no seed oils” in certain products, and True Food Kitchen, with a “Proudly 100% seed oil-free” banner on its site
- The share of searches containing “seed oil” on Instacart grew 68% last year, and “tallow” tripled
- Seed Oil Scout, an app for finding seed oil-free restaurants, is consistently the no. 3 top-grossing food app on the US iPhone App Store

# The seed oil upsell:

- Would consumers spend more to avoid seed oils? One reason they are so popular is because they're cheap
- In our survey, 9% of consumers said they would spend “a lot more” on an equivalent food item to avoid consuming seed oils, 31% “a little more,” 44% would not spend more, and 16% didn't know
- Among those who think seed oils are “toxic,” 40% would spend “a lot more” and another 40% said “a little more” — 16% said they wouldn't spend more

# Meanwhile, 'Ozempic' searches still far outpace 'seed oil' searches

Indexed Google web search volume, US, 3-month trailing average



# 5

Between tariffs, geopolitics,  
DOGE, egg prices, measles, fires,  
plane crashes, and more,  
uncertainty is on the rise.

It's affecting consumer sentiment.  
Will it affect spending?

# Consumer Trends Life Satisfaction Score

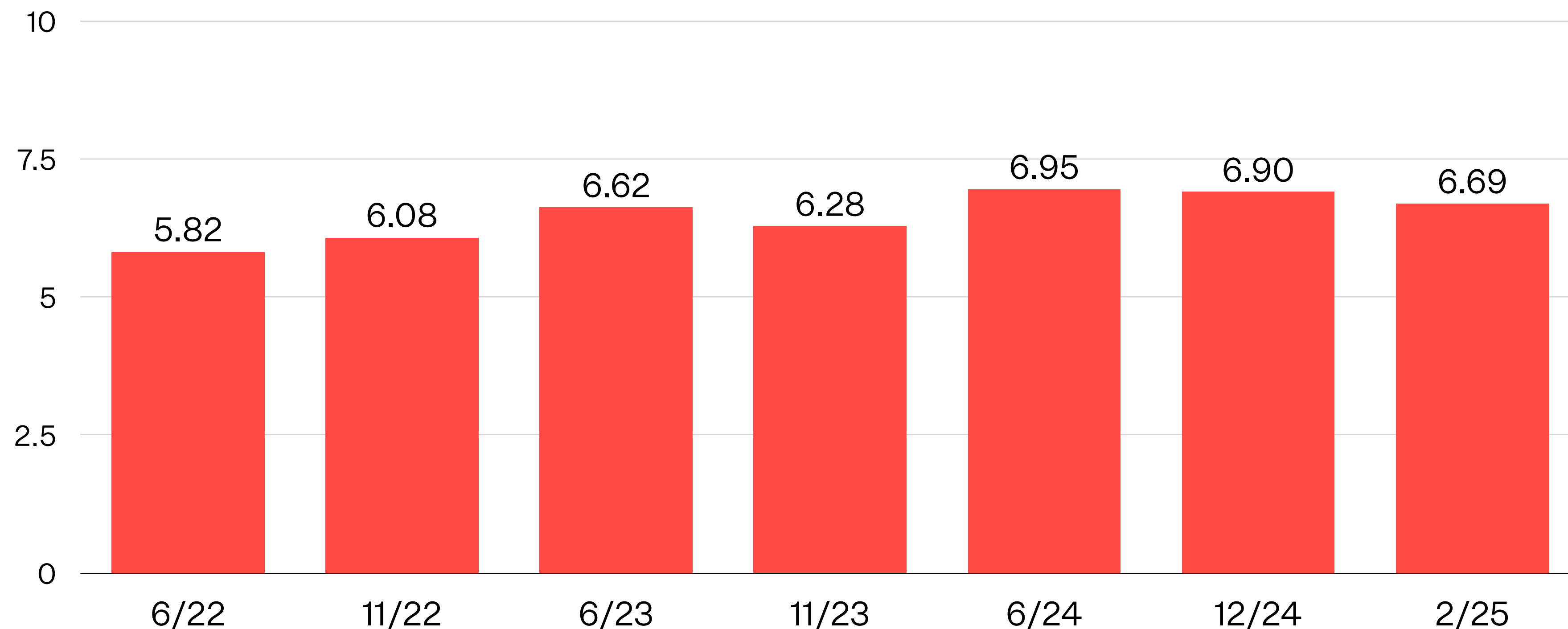
On a scale of 0 to 10, how satisfied are you  
with life as a whole these days?

6.69

Overall, February 2025

# ‘Life Sat’ has dipped a bit this year

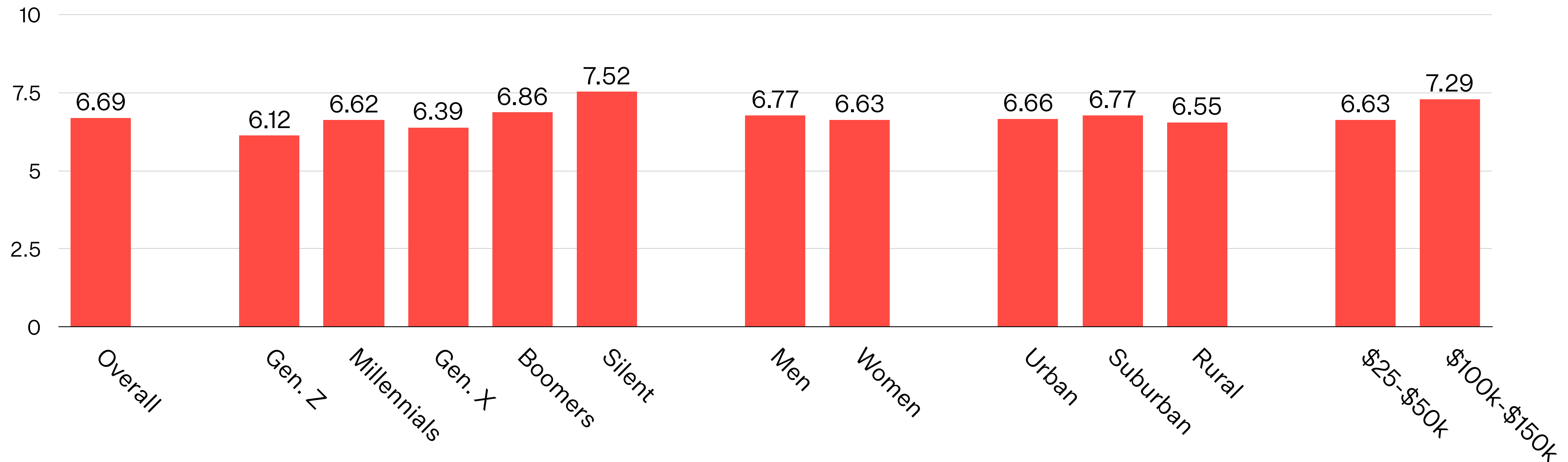
On a scale of 0 to 10, how satisfied are you with life as a whole these days?





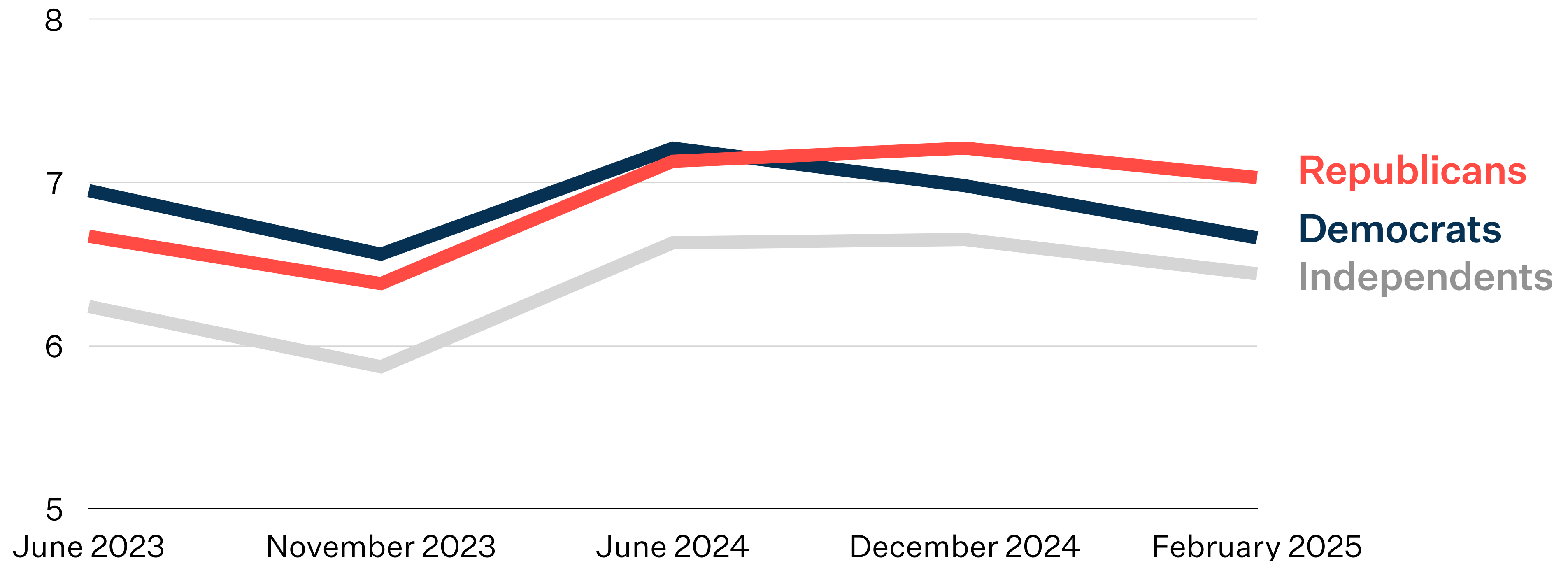
# ‘Life Sat’ varies across consumer groups

On a scale of 0 to 10, how satisfied are you with life as a whole these days?



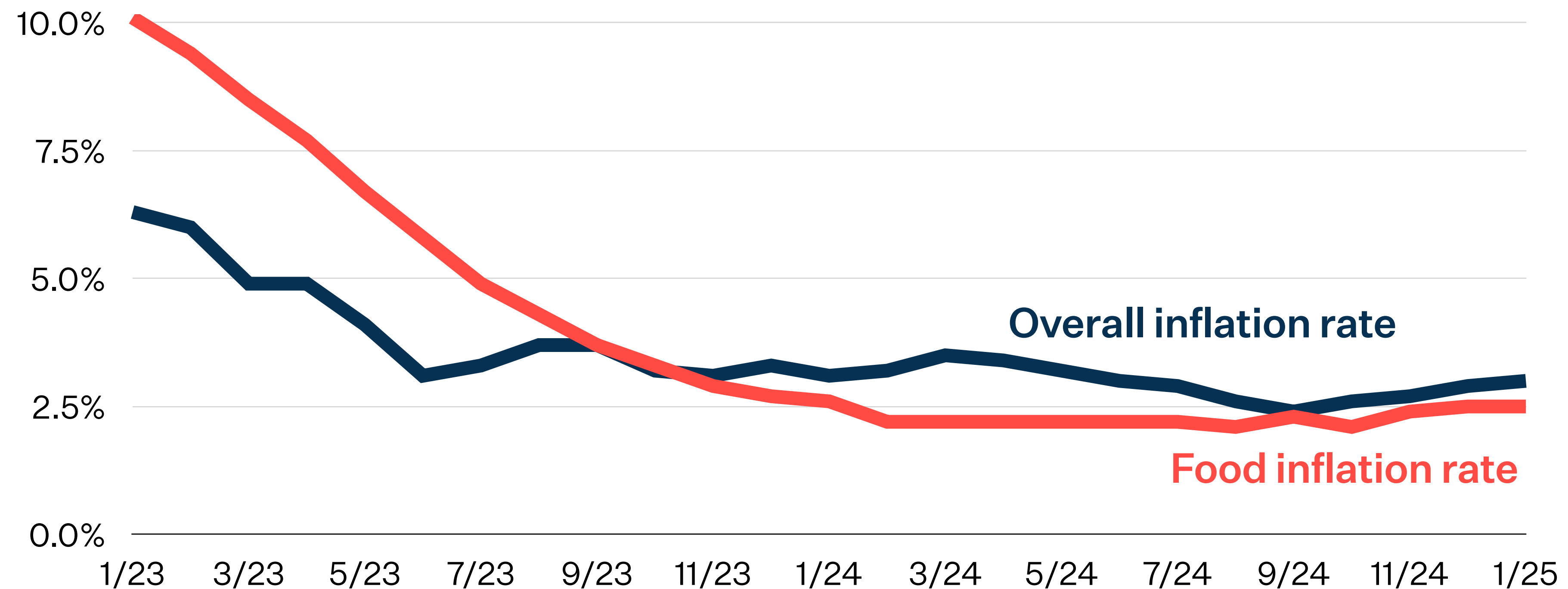
# The Life Sat gap is widening between Republicans and Democrats

Mean score by US political party affiliation: On a scale of 0 to 10, how satisfied are you with life as a whole these days?



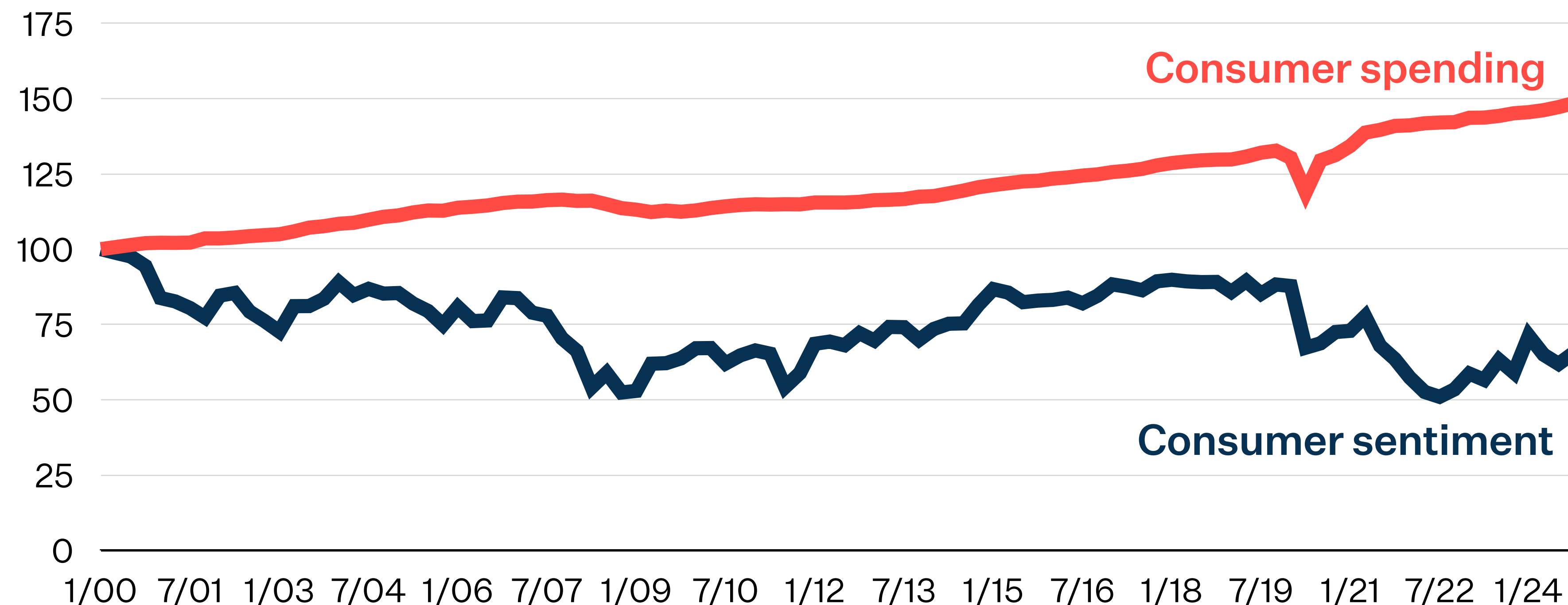
# Food-price inflation still lags overall inflation, but both are re-accelerating

## Year-over-year change in US Consumer Price Index



# The good news is that consumer sentiment does not predict spending

Indexed US real personal consumption expenditures per capita and University of Michigan consumer sentiment



# Special Thanks:

Evie Roebroek

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Helen Long • Jimson Mullakary

Andrew Goletka • Franklin Isacson

Toluna • Instacart • Earnest Analytics

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- Is drinking really on its way out?  
Not yet.
- The Gen. Z beauty consumer is actually pretty loyal
- People actually like Amazon!



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