



The Power of Adaptogens

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My Role – Market Research-Centric

Ideate within a framework of leveraging premix to provide functional claims in food and beverage products

1 Market Research/Concept Development

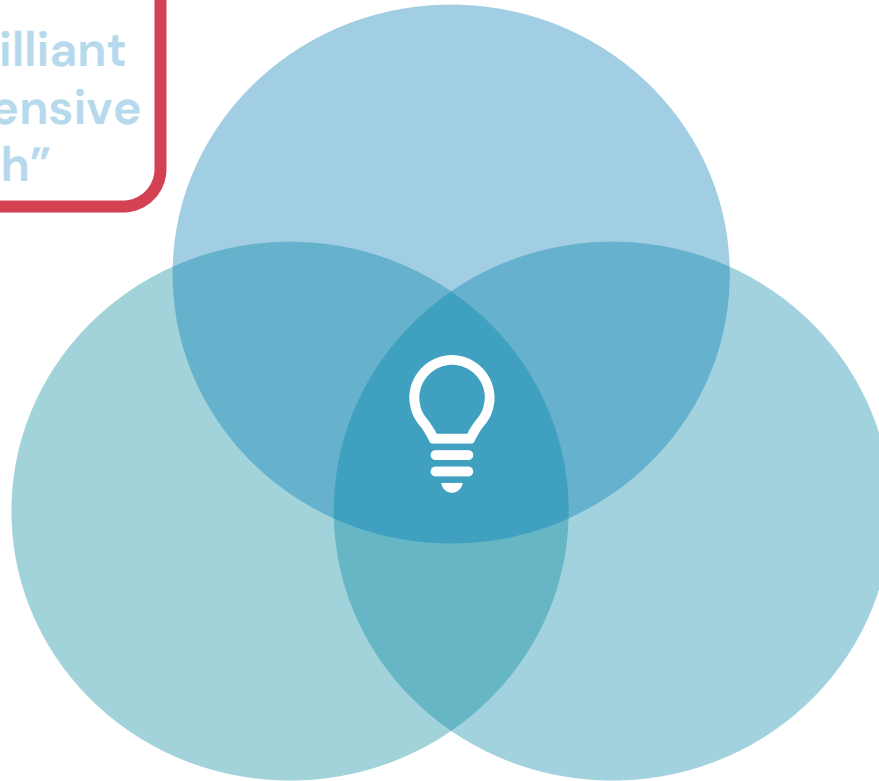
“Hey I have this brilliant idea based on extensive consumer research”

2 Science, Translation, Advocacy + Regulatory

“I will advise if your brilliant idea has legs.”

3 Technical/Prototype Development

“I will advise if your brilliant idea has feet.”



Agenda

- 1 The objective
- 2 What's an adaptogen?
- 3 Consumer insights
- 4 Opportunities for juice
- 5 Considerations when using adaptogens

Seeking Green Pastures...

Objective

Show real opportunities for lifting juice by reinvigorating or expanding its usage occasion via adaptogens



Juice/Juice Drinks

or



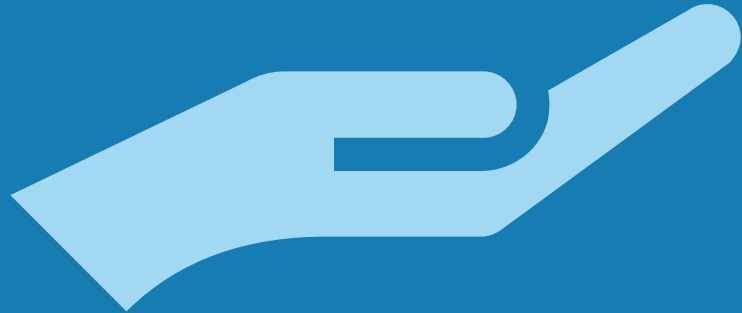
Sparkling Juice



Adaptogens

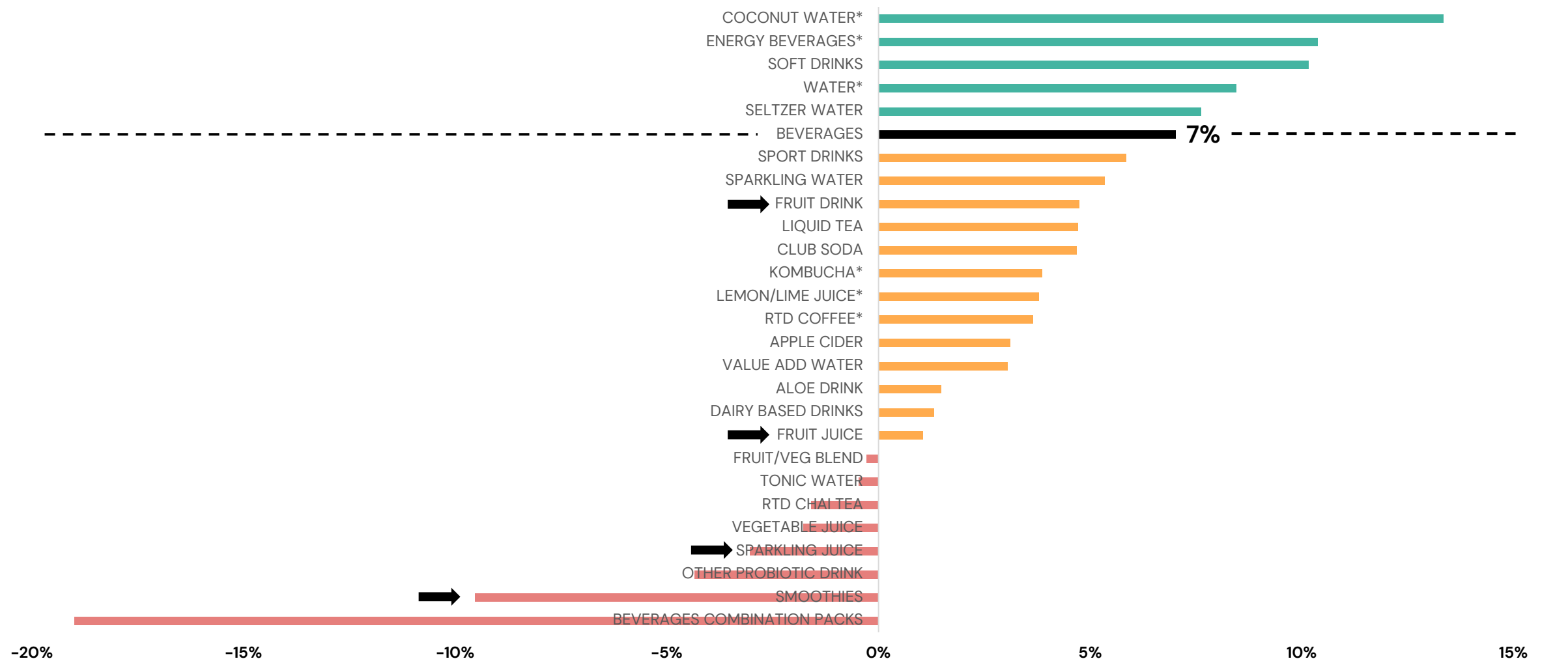


New Concept in
existing or adjacent
categories



Retail Value Growth of Beverages Category – 4 year CAGR

Waters and energy drinks are above industry growth – both in value and volume. Juice flat in past year.



*Growing in volume above industry average per EQ
Nielsen IQ – Calendar years 2021 to 2024

What is an Adaptogen?

What Are Adaptogens?

Three general guidelines apply

- 1 Plant extracts that are nontoxic in normal therapeutic doses
- 2 Substances that are stated to have the capacity to normalize body functions and strengthen systems compromised by stress
- 3 Are reported to have a protective effect on health against a wide variety of environmental assaults and emotional conditions

*Adaptogens can sometimes overlap with **nootropics**, but the term nootropics specifically refers to substances that are meant to enhance mental performance, and are not necessarily plant-based*



Potential Benefits of Adaptogens

May provide mood, stress, energy, and mental support



Help
with fatigue



Mood
enhancing



Support
sleep



Adapt
better with stress



Support
cognition

Common Adaptogens Used

Growing use in beverages



Ashwagandha



Ginger



Rhodiola



Schisandra



Ginseng



Maca



Reishi Mushroom



Curcumin



Chamomile



Bacopa

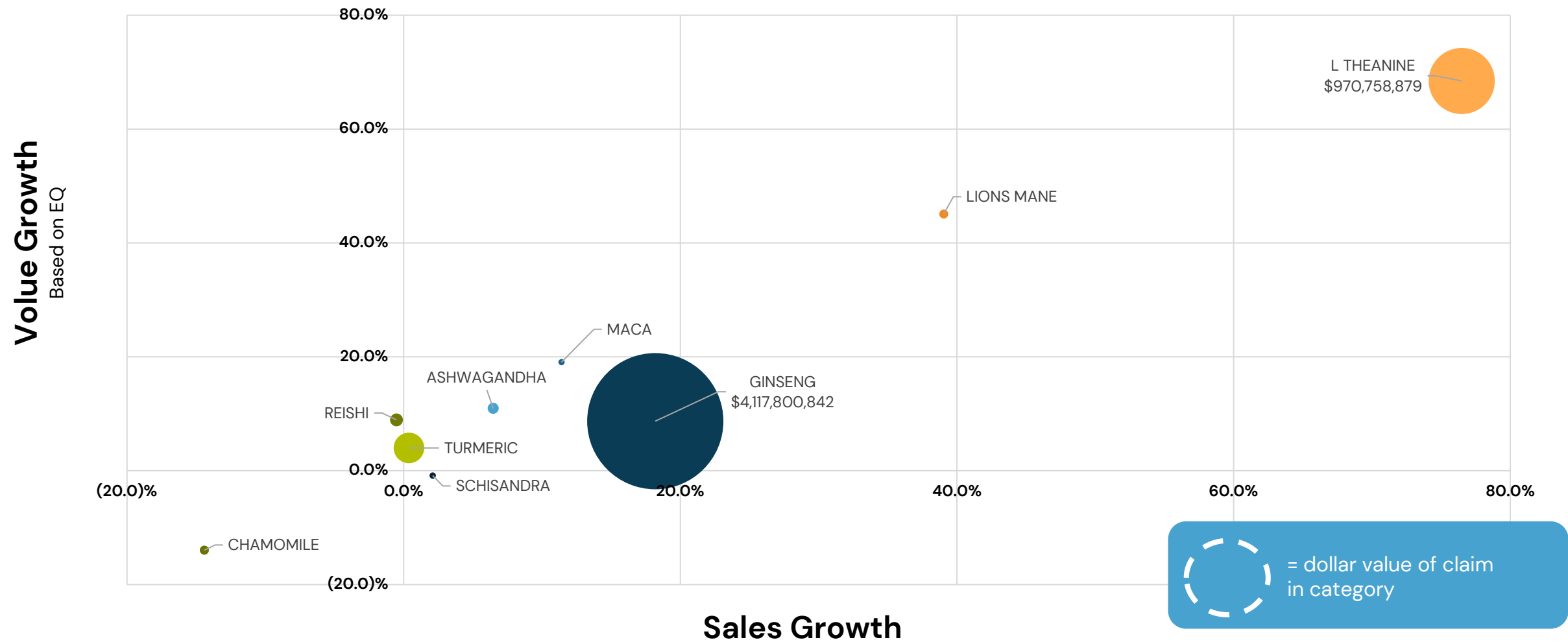
Adaptogens

Potential benefits. Clinicals for these ingredients help to substantiate the extent of the benefit(s).

	Plant Components	Benefits
Ashwagandha	Roots	Help manage stress
Ginger	Rhizome	May aid digestion, reduce nausea, and may help reduce oxidative stress
L-Theanine	Green tea leaf	Calming effect to relax you mind and help to focus
Bacopa monnieri	Leaves, stems	May help improve memory and attention
Rhodiola rosea	Roots	May help increase stamina and concentration
Panax ginseng	Roots	May help increase energy level and may benefit brain function
Schisandra	Fruit & seeds	May support strength and muscle health
Curcumin	Roots	May help with inflammation
Chamomile	Flowers	Calming effect to relax your mind

Trending Adaptogenic Ingredients in Beverages

Observed in last 52 weeks ending 9/6/25. Ginseng most popular. L-theanine most trending.

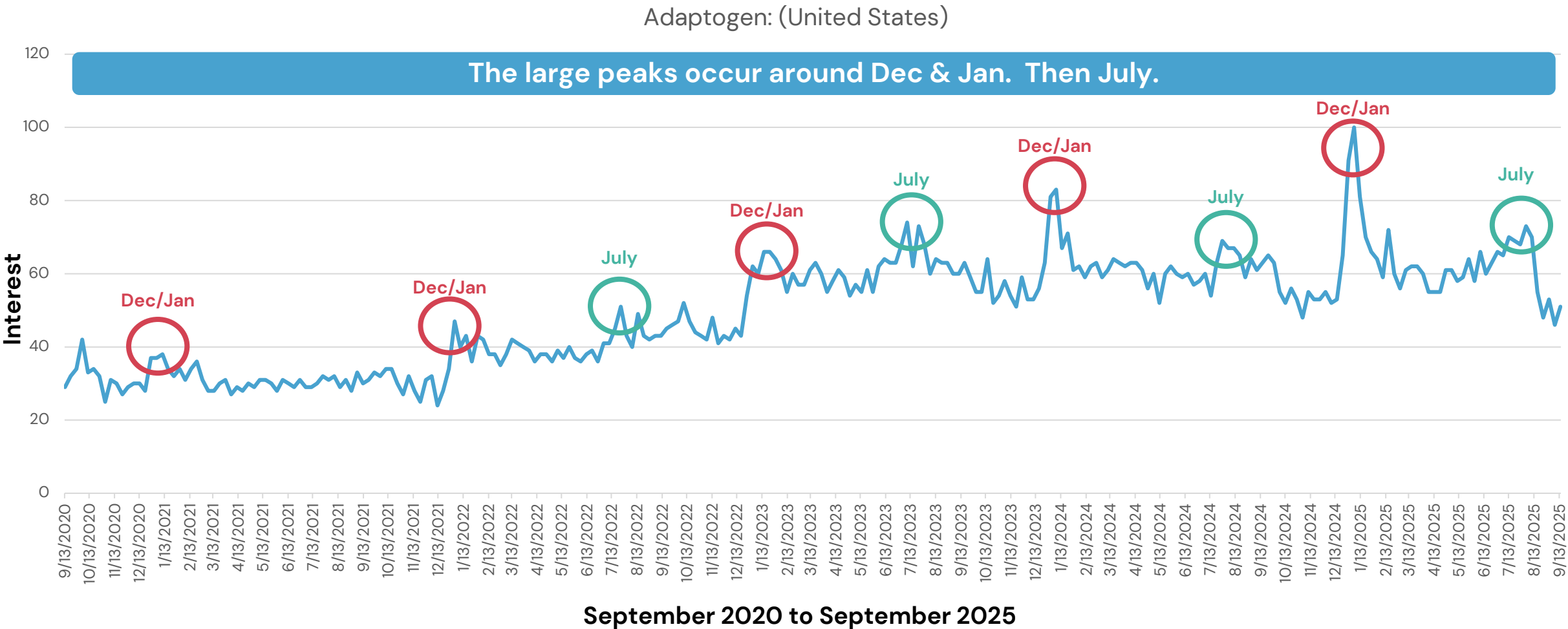


Consumer Insights

Gauging interest for adaptogens and identifying end-products and consumer targets

Interest in Adaptogens Over Time

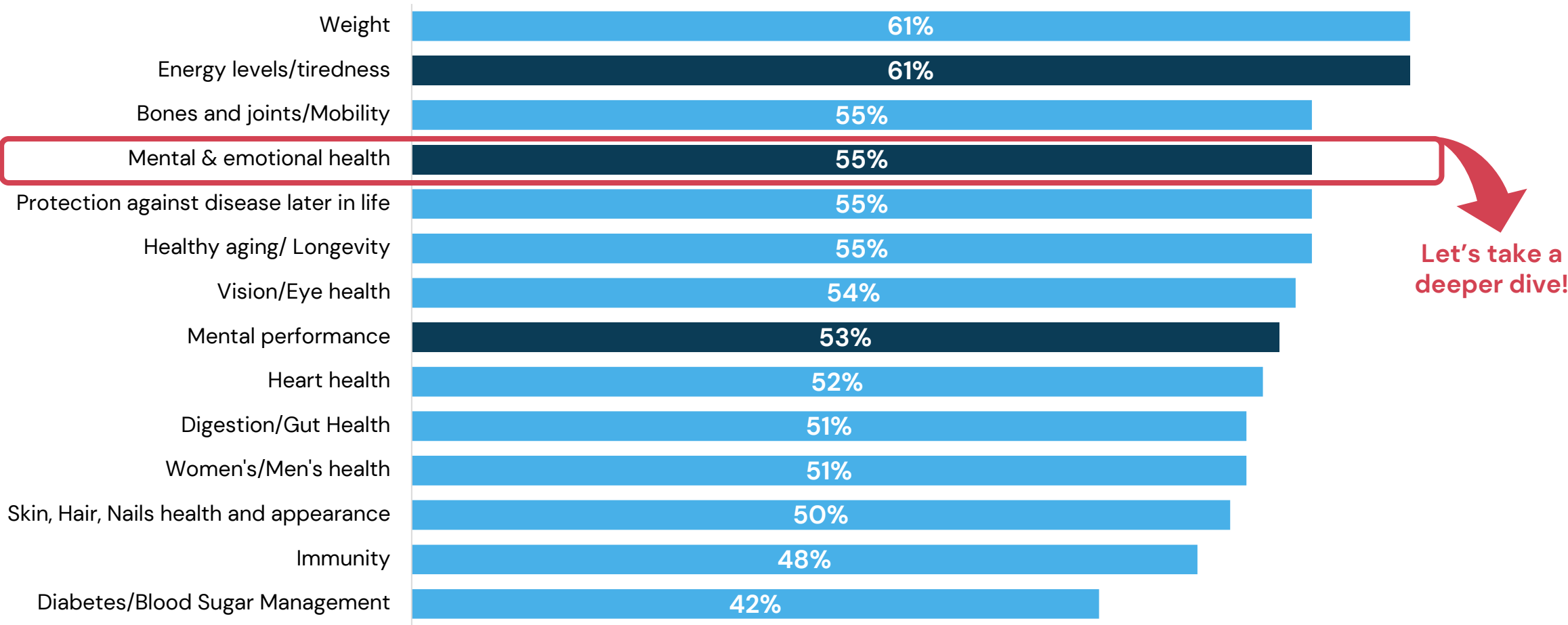
Google Trends search term "adaptogen." Any idea about where the peaks occur?



Health Concerns within US Population

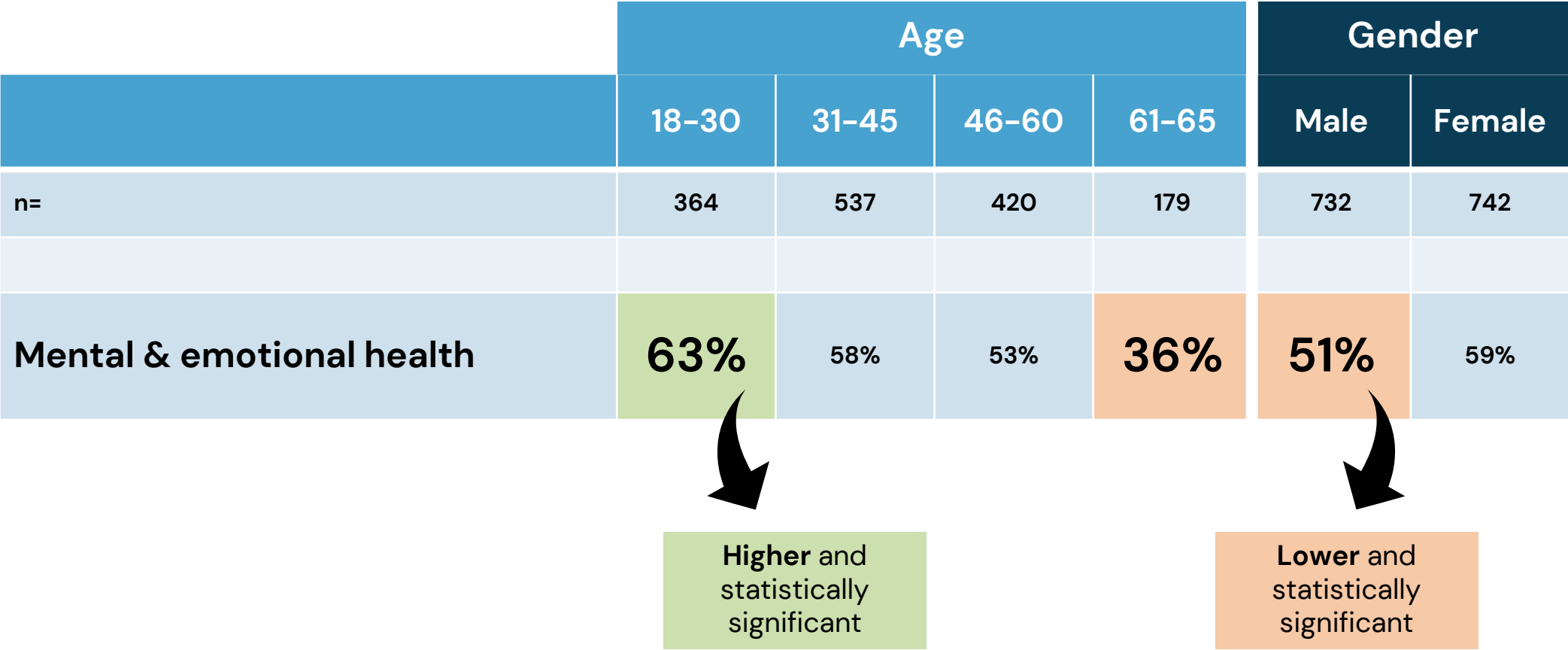
Adaptogens can help target energy levels, mental & emotional health, and mental performance

Q. How much do you worry about the following? (% worry/worry a lot)



Mental & Emotional Health Concerns Skew Aged 18–30 & Female

Adaptogens can help target mental & emotional health concerns



Value of Front of Pack Health Claims Associated with Mood or Stress

Nearly 90% in energy drinks, soft drinks, sparkling water, and kombucha categories



\$220 M | 155% Chg YA



Energy
drinks



Soft
drinks



Sparkling
water



Kombucha

Social Media Expressions of Beverages with Mood/Stress Claims

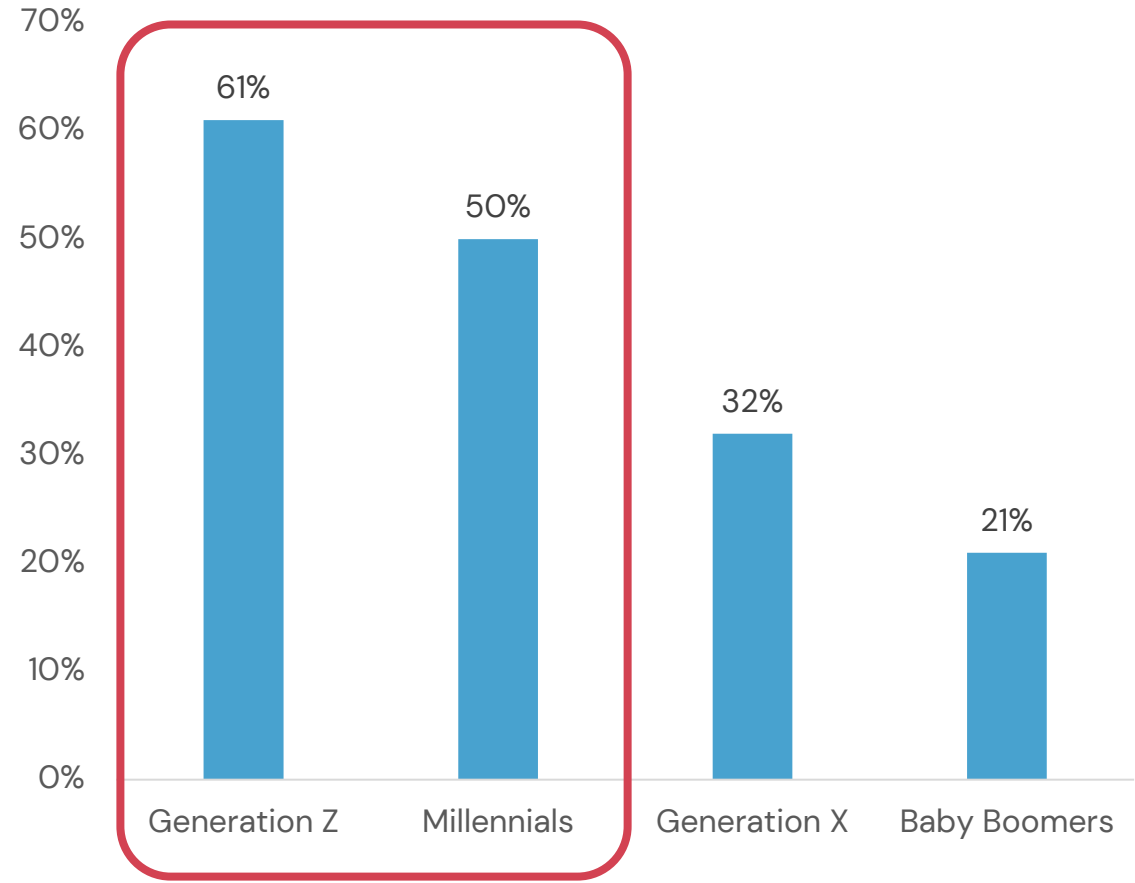
Targeting skews slightly toward younger women



Non-Alcoholic Drinks (i.e. Mocktails)

Emerging category for leveraging adaptogens. Higher interest among younger consumers.

Interest in seeing more alcohol-free versions of alcohol products



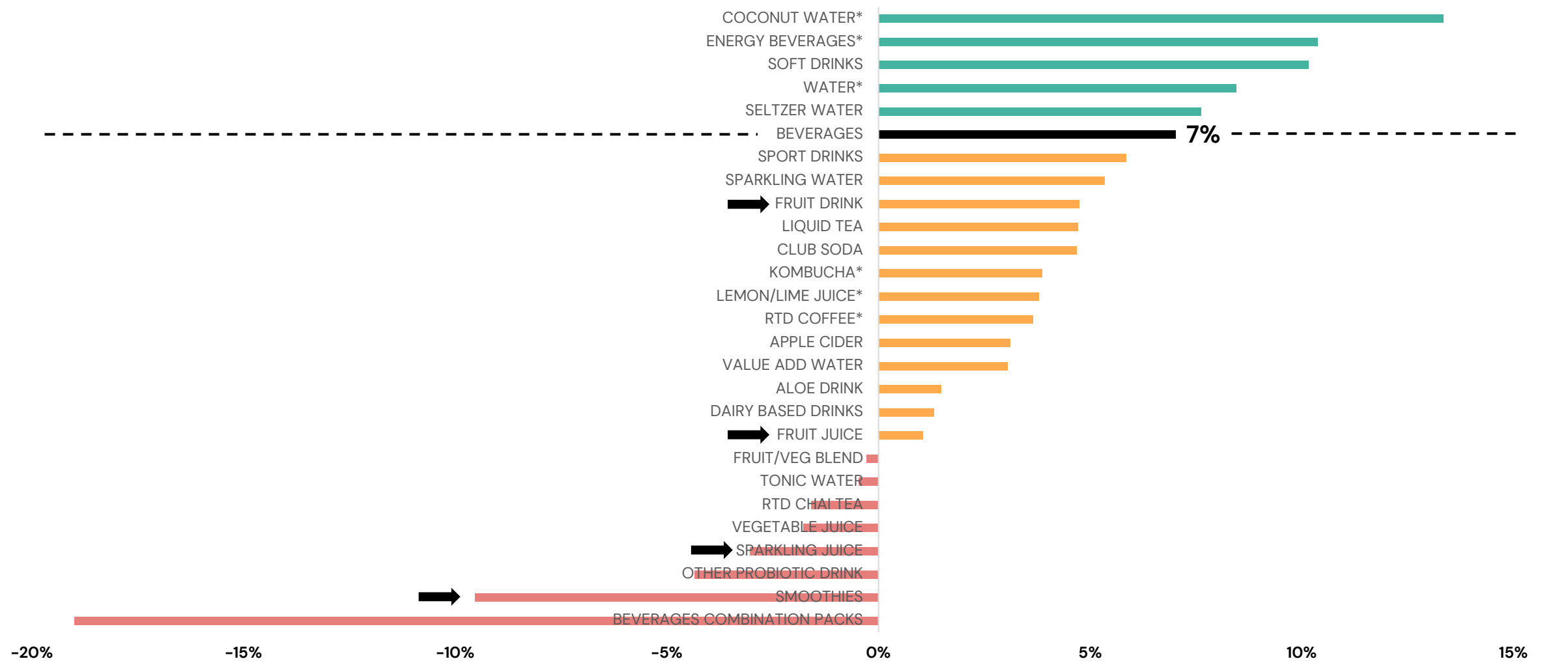
\$22 M | 83% Chg YA
Non-alcoholic spirits still emerging

Opportunities for Adaptogens

Existing prominence in mocktails and energy drinks, but also in existing juice categories

Retail Value Growth of Beverages Category – 4 year CAGR

Waters and energy drinks are above industry growth – both in value and volume. Juice flat in past year.



Recall the Objective

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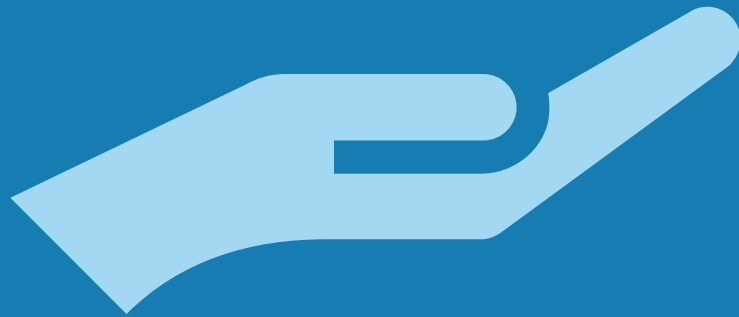
Sparkling Juice



Adaptogens



New Concept in
existing or adjacent
categories



Invigorate Category with Concept Development

An Example – Combine struggling category with trending adaptogenic demand



Sparkling Juice
–3 % four-year CAGR



Adaptogens



New Concept with
FOP claim(s)

Proposing Sparkling Juice with Adaptogens Thru Concept Development

Our process for determining whether “Inner Vibe” is appealing to a target demographic: Gen-Z and millennial women

1 Market Research/Concept Development

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Online Consumer Testing w/Inner Vibe

Objective: determine appeal to younger women



Contains 25% juice	
Nutrition Facts	
1 servings per container	
Serving size	1 Can (252ml)
Amount Per Serving	
Calories	35
% Daily Value*	
Total Fat 0g	0%
Saturated Fat 0g	0%
Trans Fat 0g	
Cholesterol 0mg	0%
Sodium 0mg	0%
Total Carbohydrate 9g	3%
Dietary Fiber 0g	0%
Total Sugars 7g	
Includes 0g Added Sugars	0%
Protein 0g	0%
Vitamin D 0mcg	0%
Calcium 30mg	2%
Iron 0mg	0%
Potassium 470mg	10%
Thiamin	100%
Niacin	100%
Vitamin B6	100%
Vitamin B12	100%
Biotin	100%
Pantothenic Acid	100%
Magnesium	2%
*The % Daily Value (DV) tells you how much a nutrient in a serving of food contributes to a daily diet. 2,000 calories a day is used for general nutrition advice.	

Inner Vibe Sparkling Energy

Hydrate, Energize, and Focus

Experience a whole new level of refreshment and vitality with Inner Vibe Sparkling Energy Drink! This flavorful and invigorating sparkling drink rehydrates, while boosting energy levels and promoting mental focus – all while delivering great taste at less sugar and calories than leading sparkling juice drink brands.

Enjoy the tangy zest and the sweet allure of a real orange citrus blend, combined with the power of botanicals, along with energizing nutrients from non-caffeinated sources like B-vitamins and L-theanine.

Try Inner Vibe, a revitalizing experience to unlock the full potential of your day!

Online Consumer Testing w/Inner Vibe – Heat Map

Red indicates high engagement via clicks



Nutrition Facts

1 servings per container

Serving size 1 Can (252ml)

Amount Per Serving

Calories

Total Fat 0g 0%

Saturated Fat 0g 0%

Trans Fat 0g

Cholesterol 0mg 0%

Sodium 0mg 0%

Total Carbohydrate 3g 3%

Dietary Fiber 0g 0%

Total Sugars 7g

Includes 0g Added Sugars 0%

Protein 0g 0%

Vitamin D 0mcg 0%

Calcium 30mg 2%

Iron 0mg 0%

Potassium 470mg 10%

Thiamin 100%

Niacin 100%

Vitamin B6 100%

Vitamin B12 100%

Biotin 100%

Pantothenic Acid 100%

Magnesium 2%

*The % Daily Value (DV) tells you how much a nutrient in a serving of food contributes to a daily diet. 2,000 calories a day is used for general nutrition advice.

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Online Consumer Testing w/Inner Vibe – Consumer Feedback

The Inner Vibe concept is significantly preferred over control concepts across most attributes



Concept Attributes Top Box (Top Two BOX) (N=202)					
	Likelihood to Purchase	Believable	Appealing	New & Different	Is Healthier Option?
TEST - Inner Vibe Sparkling Juice (g)	86% bd🚀	91%	88% b🚀⬆️	74% bd🚀	74% b🚀⬆️
CONTROL - Monster Energy Zero Sugar (b)	69% dg	88%	76% g	51% dg	63% g
CONTROL - Sanpellegrino Aranciata Rossa (d)	76% bg	89%	81%	61% bg	69%

🚀 = Indicates statistical significance at 95% level as indicated by lowercase letter(s) – ex. ‘a’ versus ‘b’
⬆️ = Indicates directional preference vs control(s)

Concept testing income single HH - \$25K+, Primary HH Shopper; N = 202, Gender: Female Generation Z and Millennials

How likely would you be to purchase this product? Very Likely to Very Unlikely (5 point scale); How believable are the product claims on the package? Believable to Unbelievable (5 point scale); How appealing is this product to you? Very unique to somewhat unique (5 point scale); Source: Qualtrics. Statistical testing at 95% level

Considerations for Using Adaptogens and Using Front of Pack Health Benefit Claims

Claims should be truthful and be evaluated on a case-by-case basis

Final Considerations When Using Adaptogens in Beverages

1. **Are ingredients GRAS approved in your end-product?**
2. **Clinicals. How many credible studies are available and how strong is the quality of the study for the ingredient(s) in question.**
3. **Front of pack claims should be accurate and reflect the extent of the scientific supporting data.**
4. **Ensuring the appropriate dosage is leveraged to uphold a front of pack claim; otherwise nutrient content claim is more preferred (i.e. “with ginger”). Latter may impact market differentiation.**
5. **Taste will always reign supreme; some drinks with adaptogenic ingredients contain earthy-like off flavors, although it is highly possible to mask for appealing to a wider mainstream.**

We bring progress to life

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