

EMOTIONAL MANAGEMENT AND "ENDORPHIN/DOPAMINE ALTERNATIVES"

Q3 2026

Global Trends, Consumer Insights & Regulatory Landscape

2026

Data Cutoff:
July 2026 · Based on official
releases and authoritative
industry reports



www.4unutra.com

Email: info@4unutra.com

Tel: +86 0898 6537 8036

Phone: +86 193 8998 4020

4Unutra(Hainan) Co., Ltd

No.181 Xingyang Avenue, Jiangdong
New District, Haikou, Hainan, China



Disclaimer: This document is for business
decision-making reference only and does not
constitute legal advice. For specific
compliance requirements, refer to the latest
official releases from regulatory authorities
or consult professional regulatory advisors.

Table of Content



01. Report Background Logic

02. Market Overview: Explosive Growth of Emotional Health Supplements

03. Consumer Insights: How Generation Z is Redefining Emotional Well-being

04. Hot Product/Ingredient Trends

05. Dosage Form Trends: Gummies Become the Best Carrier for "Emotional Snacks"

06. Global Compliance Analysis

07. Industry Trends and Strategic Considerations

08. Market Opportunities and Trends Outlook

2026 Annual Market Size Forecast

\$8.6 billion

Non-pharmaceutical solutions

70%

Key takeaway: The "emotional snacking" trend is not a short-term fad, but a structural shift in how a generation redefines "how to take care of themselves."

1.1 Market Description

The global mood health supplement market continued to expand in 2026. According to an industry report released by Grand View Research in January 2026, the market size was approximately \$8.6 billion annually, with plant adaptogens and functional fungi categories claiming to promote "calmness," "focus," and "clarity" experiencing an annual growth rate exceeding 22%.

1.2 Generation Z

Among Gen Z consumers (approximately 12-27 years old), over 70% report experiencing moderate to severe stress daily (APA Stress in America 2026), but they significantly favor non-pharmaceutical solutions, driving "daily micro-dose" and "emotional snacks" to become mainstream product formats.

1.3 Key observations based on publicly available data

The global mental health supplement market is valued at approximately US\$1.755 billion in 2025 and is projected to grow to US\$3.381 billion by 2032, representing a CAGR of approximately 9.82% (Research and Markets, 2025).

In the mood-enhancing supplement market, gummies account for 27.4% of the market share, while Ashwagandha accounts for 18.6% of the raw materials (Deep Market Insights, 2025).

The stress relief supplement market is estimated at \$600 million in 2025 and is projected to reach \$850 million in 2031, with a CAGR of approximately 6% (Future Market Insights, 2026).

82% of Gen Z consumers said that ingredients that help relax or improve mood are "essential" or "very good" in food and beverages (Mintel, 2026).

This report analyzes the structural opportunities and boundaries of this sector from the perspectives of market drivers, consumer behavior, key ingredients (ashwagandha, rhodiola rosea, L-theanine, magnesium glycine, hericium erinaceus, cordyceps), and global compliance.

02. Market Overview: Explosive Growth of Emotional Health Supplements

Your home of better nutraceuticals

Market level	Scale in 2025	Forecast size	CAGR	source
Mental health supplements	\$1.755 billion	\$3.381 billion (2032)	9.82%	Research and Markets, 2025
Stress relief supplements	~\$600 million	\$850 million (2031)	6%	Future Market Insights, 2026
Mood-enhancing supplements	\$743 million	\$934 million (2036)	2.1%	Deep Market Insights, 2025

A broader market footprint

The global brain health supplement market is valued at \$10.5 billion in 2025 and is projected to reach \$22.6 billion by 2033, with a CAGR of 10% (Global Market Insights, 2026).

Global adaptation to the original market: Valued at \$13.7 billion in 2025, projected to reach \$22.5 billion by 2032, with a CAGR of 7.35% (Global Market Insights, 2026).

The global FMCG market for mental health and cognitive function: approximately US\$35.26 billion in 2025, projected to reach US\$69.59 billion in 2032, with a CAGR of 10.2% (Research and Markets, 2026).

Driving factors

A mental health crisis among Generation Z: A 2026 survey by the American Psychological Association (APA) shows that 67% of Gen Z adults feel overwhelmed, and 79% consider managing mental health as a top life priority.

The trend of "emotional snacking": A 2026 Mintel survey indicates that 82% of Gen Z believe that ingredients that help relax or improve mood are "essential" or "good to have" in food and beverages.

A shift in perception: Consumers view supplements as "daily micro-dose self-regulation" rather than medical intervention. A 2026 Morning Consult survey showed that 57% of mood supplement users choose to take less than the maximum dose labeled on the product daily.

Cultural tendency to reject prescription drugs: Generation Z is significantly more inclined to manage emotions through non-pharmacological means, with only 12% willing to use prescription anti-anxiety medications (Mintel, 2026).

03. Consumer Insights: How Generation Z is Redefining Emotional Well-being

Your home of better nutraceuticals

The term "anxious generation" is not an exaggeration.

APA 2026 survey data shows:

67% of Gen Z adults feel overwhelmed.

60% felt overwhelmed by the current events.

Only 55% believe their coping mechanisms are effective.

79% consider managing mental health as a top life priority.

What they wanted was a "ritual," not "taking medicine."

Generation Z's health consumption exhibits three main characteristics: "lightweight + low barrier to entry + immediate results".

50% of Generation Z are taking proactive steps to protect and promote their physical and mental health (Mintel, 2026).

They prefer functional beverages and gummies to tablets/capsules—hoping to obtain nutrition in a "pleasant and convenient way."

Emotion regulation has become one of the three core areas of health for Generation Z, alongside efficiency and convenience, and energy replenishment.

Purchase decision factors

Transparent labeling (clear ingredient traceability): 72% of consumers consider it the most crucial.

Taste: 58% considered it an important factor.

Convenient packaging: 51% of decision-making relies on this factor.

Premium acceptance rate: approximately 30%, higher than that of ordinary functional foods.

The concept of "alternatives" between endorphins and dopamine

The so-called "alternative" does not directly replace neurotransmitters, but rather gently regulates the HPA axis (stress response) and neurotransmitter balance through adaptogens, amino acids, and fungal components, simulating "satisfaction" and "relaxation." Consumers view it as a non-addictive daily self-care ritual.

Structural shift in consumer behavior

From "health tools" to "wellness routines": Supplements are no longer for "treating illnesses," but for "feeling better today." A 2026 Morning Consult survey shows that 63% of users use them for "focused morning start-ups" and 48% for "afternoon stress relief."

Contextualized consumption: Generation Z chooses products for specific moments—pre-exam focus, workplace calm, and bedtime relaxation. The market is shifting from "general-purpose" to "contextualized" products.

The "inside-out" health philosophy: Generation Z pursues not only a superficial state, but also a "more transparent and stable" inner feeling.

Trend 1: Ashwagandha – The King of Adaptants

Ashwagandha holds an 18.6% market share in the ingredients of mood-enhancing supplements, the highest among all single ingredients (Deep Market Insights, 2025).

Scientific Support: A meta-analysis published in Phytotherapy Research in 2025 suggests that daily intake of 300-600 mg of the standardized extract may help reduce perceived stress scores and morning cortisol levels. Clinical evidence is relatively robust within the adaptation category.



Application Expansion: From traditional capsules to various forms such as gummies, functional beverages, and ready-to-drink shots. SPINS Q1 2026 data shows that products containing Ashwagandha from South Africa saw a year-on-year sales increase of approximately 28% in the US natural channel.

Consumer Perception

It has been a viral sensation on social media, seen by Generation Z as a "natural tranquilizer." Related topics on TikTok have garnered massive views.

Trend 2: Rhodiola – Dual Support for Physical and Mental Performance

Rhodiola rosea has gained attention for its dual support for physical and mental well-being, and it has performed exceptionally well in the "focus and anti-fatigue" sub-segment.

Core Value:

Enhance physical endurance and mental performance, combat fatigue and stress.

Related searches on Amazon Europe increased by 34% year-over-year (Q1 2026).



Formulating trends: Often combined with L-theanine to form "caffeine-free, alert and focused" formulas, targeting high-intensity workers and students.

Trend 3: L-Theanine and Magnesium Glycine – A Calming Combination for All Day Long

L-Theanine: Google Trends shows that searches for "L-theanine focus" have increased by 85% since 2024. Its mechanism of action is believed to be through increasing alpha brainwave activity, producing a state of alertness that is "relaxed but not drowsy," perfectly matching the need for "clarity." Products are mostly available as 100-200mg chewable tablets or beverage powders, often blended with caffeine in a 1:2 ratio.

Magnesium Glycinate: Overtaking magnesium citrate as the dominant form of magnesium for mood support due to high bioavailability and mild neuromuscular relaxing effects. Nutrition Business Journal estimates in 2026 that magnesium glycinate will contribute more than 40% of the overall magnesium supplement market growth. The application scenarios have expanded from nighttime sleep aid to "all-weather stress management", and small doses (50-100mg of elemental magnesium) during the day have been added to functional gummies and drinks.



Combination trend: Combinations of magnesium with L-theanine, chamomile and other ingredients are the fastest growing sub-category, with an annual growth rate of 20-25% (Nutrition Business Journal, 2026).

Trend 4: Functional Fungi

– Hericium erinaceus and Cordyceps

Lion's Mane mushroom is the dominant player in the functional fungi market: The global Lion's Mane supplement market was valued at \$418 million in 2024 and is projected to reach \$1.6 billion by 2034, representing a CAGR of 13.5% (Global Market Insights, 2026).

Hericium erinaceus accounts for 40% of the functional fungi market in the United States. Cognitive health and intelligence enhancement account for 45% of the Hericium erinaceus market, with a CAGR of 13.7%.



Hericium erinaceus, with its potential to stimulate nerve growth factor (NGF), is widely used as a supplement for "cognitive clarity" and "long-lasting brainpower." Among user reviews, "better conversational fluency" and "reduced mental fog" are frequently mentioned keywords.

Cordyceps

By supporting mitochondrial function and oxygen utilization, it focuses on a "feeling of vitality" rather than a stimulating effect. Its "morning energy boost" complex powder with Hericium erinaceus saw a 31% increase in sales through natural channels in North America (SPINS, 2026), and is seen as an alternative to high-caffeine energy drinks.

The explosive growth of the gummy candy market

index	data	source
Global Gummy Supplement Market in 2025	\$11.75 billion	Nutrition Business Journal, 2026
2026 is expected	\$13.23 billion	Nutrition Business Journal, 2026
2034 forecast	\$35.56 billion	Nutrition Business Journal, 2026
CAGR (2026-2034)	13.16%	Nutrition Business Journal, 2026

Why gummies have become the preferred form of mood supplement

In the mood-enhancing supplement market, gummies lead all dosage forms with a 27.4% market share (Deep Market Insights, 2025).

Gummies lower the "trial and error threshold" and "daily consumption threshold" for supplements—they can be taken anytime, anywhere without water.

Eating gummies is a kind of "healing ritual"—pleasure, stress-free, and shareable, perfectly matching the consumption psychology of Generation Z.

According to the Nutrition Business Journal in 2026, gummies accounted for 34% of the overall mood supplement market, an increase of 12 percentage points from 2023.

EU: "Red Lines" for Emotional Health Claims

The EU has extremely strict regulations on claims related to emotional health, which is a core hurdle that brands must overcome to enter the European market.

Key takeaways for brands:

In the EU, "mood gummies" cannot claim to "relieve stress"—this is an unauthorized health claim. Only ingredient descriptions (such as "contains Ashwagandha extract") are allowed; functional associations are prohibited. Terms like "adaptogen" and "nootropic" face strict compliance scrutiny.

***Any claim counts as a health claim:** The EU considers "general health claims"—including claims about cognitive function, stress reduction, mood, or overall mental health—as health claims.

***Unauthorized claims are strictly prohibited:** companies may only use claims authorized by the European Commission and based on scientific evaluations conducted by EFSA.

***There are no authorized claims regarding "stress" and "emotions":** There are currently no approved claims about improving "stress" or "emotions" – including reducing or managing psychological stress, improving mood, enhancing well-being, relaxing or balancing emotions.

***Plant-based ingredient claims frozen:** Since 2010, the assessment of health claims for plant-based ingredients has been suspended, with no clear timeline for resolution.

***In April 2025, the European Court of Justice ruled to ban the use of unauthorized health claims about plant ingredients in commercial advertising—** even if the European Commission's evaluation process is suspended for an extended period.

***The claim of "adaptogens" has been deemed non-compliant:** In 2026, NutraIngredients reported that the claims of "brain-boosting super mushroom gummies" about relieving stress or improving focus and memory have been deemed non-compliant, and the use of terms such as "adaptogens" or "superfoods" also faces strict scrutiny.

US FDA: Framework for Structure/Function Claims

- *According to DSHEA, structural/functional claims can be made, such as "helps maintain a sense of relaxation" or "supports positive emotions".
- *A notification must be submitted to the FDA within 30 days of the first sale, along with a disclaimer. If ingredients such as Ashwagandha and Hericium erinaceus are New Dietary Ingredients (NDIs), notification must be provided before they are marketed.
- * You may not claim to "diagnose, treat, cure or prevent" any disease. The FDA has issued warning letters to supplement companies claiming to "treat depression and mental illness" (multiple cases in 2025-2026).

China

- *Ashwagandha, Rhodiola rosea, and Hericium erinaceus can be used as ingredients in ordinary food (must be listed in the catalog), while health food products must obtain the "blue hat" certification. The functional catalog does not yet include terms such as "anti-anxiety" or "mood-enhancing".
- * Emotional gummies and functional drinks sold through cross-border e-commerce channels must comply with platform and advertising laws and must not involve disease prevention or treatment.

3 core trends

001 Emotional wellness is becoming a "daily necessity": supplements are shifting from "occasional use" to "daily rituals." The availability of products like gummies and energy drinks has lowered the barrier to entry, with 57% of users taking less than the maximum recommended daily dose (Morning Consult, 2026).

002 Adaptants are expanding across industries: from supplements to functional foods, beverages, beauty products, and personal care, becoming a "lifestyle ingredient." Global Market Insights data shows the adaptants market will have a CAGR of 7.35% in 2026.

003 "Emotional snacking" is becoming mainstream: 82% of Gen Z people want emotional support ingredients in food and beverages (Mintel, 2026), and emotional health is redefining the meaning of "snacks".

Strategic considerations for industry participants

***Focusing on gummy candies and functional beverage**

formats: Gummy candies account for 27.4% of the mood-enhancing supplement market and are a core vehicle for reaching Generation Z. The number of new functional beverage launches increased by 41% year-on-year (Innova Market Insights, 2026).

***Ashwagandha is currently the most recognized ingredient:**

accounting for 18.6% of the raw materials in mood-enhancing supplements, leading in consumer awareness.

***The EU emphasizes the need for extreme caution in its**

strategy: any claims of "stress relief" or "mood improvement" are unauthorized health claims in the EU, and it recommends focusing solely on ingredient descriptions. Brands should complete multi-regional legal assessments during the product concept stage.

***Contextualized narratives are key to differentiation:** Gen Z is not buying "ingredients," but rather "scenario-based solutions"—focus before exams, calmness in the workplace, and relaxation before bed. Morning Consult data shows that 63% of users choose products based on scenarios.

Emotional management supplements are undergoing a transformation from a niche market to a mainstream health category. Based on existing data and trends, three relatively certain directions can be observed:

001 Gen Z will continue to dominate growth: Mental health is Gen Z's top life priority, with 79% placing it at the top of the list. Their demand for "pleasurable dosage forms + emotional support" will continue to expand.

002 Gummies will become the “default form” of emotional supplements: the gummy market is growing at a CAGR of more than 13%, and pleasant experience is the core driver of repurchase. Nutrition Business Journal data shows its share has risen to 34%.

003 Compliance capabilities determine market entry barriers: the EU's strict control over emotional health claims—with the European Court of Justice ruling in 2025 further tightening the space—means that brands that complete compliance arrangements first will gain a first-mover advantage.

Recommendations for industry participants:

***The brand focuses** on "daily fine-tuning" rather than "medical alternatives," using gummies/functional drinks as a medium and scenario-based storytelling as the core to build an emotional health brand that Generation Z is willing to actively share.

***Manufacturers:** Develop precise formulation capabilities for emotional well-being – particularly in terms of the stability, taste optimization, and bioavailability of ingredients such as Ashwagandha, L-theanine, and functional fungi.

*** Compliance Team:** Closely monitor regulatory developments in the EU and the US regarding claims to emotional health, and plan ahead for compliance strategies that prioritize "ingredient statements" rather than "functional claims," with particular caution required following the European Court of Justice ruling.



This report does not make recommended judgments on any products or strategies. It only presents the market landscape and compliance precautions based on existing public information for industry stakeholders to refer to when making decisions.

Data source
Research and Markets, Global Mental Health Supplements Market Report, 2025.
Future Market Insights, Stress Relief Supplements Market Analysis, 2026.
Deep Market Insights, Mood Enhancing Supplements Market, 2025.
Global Market Insights, Brain Health Supplements Market; Adaptogens Market, 2026.

American Psychological Association (APA), Stress in America™ 2026.
Mintel, Global Consumer Wellness Trends: Z世代与情绪健康, 2026.
Morning Consult, The Daily Supplement User: Habits & Preferences, 2026.
Nutrition Business Journal, Delivery Format & Specialty Supplement Reports, 2026.
Innova Market Insights, New Product Database: Functional Beverages, 2026.
SPINS, US Natural Channel: Adaptogens & Mood Support, Q1 2026.

Phytotherapy Research, Meta-analysis on Ashwagandha and Cortisol, 2025.
Court of Justice of the European Union, Ruling on Plant-Based Health Claims in Commercial Communications, April 2025.
NutrAlignredients, Nootropic Mushroom Gummies Claims Ruled Non-Compliant, 2026.
FDA, Warning Letters on Mental Health Supplement Claims, 2025-2026.
EFSA, Register of Health Claims; Regulation (EC) No 1924/2006.

Est. 2022

4 U N U T R A

Health Solution Architect in
Nutraceutical Industry



Your home of better nutraceuticals



We Design, Engineer, And Deliver Market Success.

4UNUTRA brings together over 15 years of industry experience — through our founding team's strategic groundwork and partnerships with YouGu Biotech and BKP. This integrated foundation gives us a resilient supply chain, agile response capabilities, top-tier manufacturing, and market-ready consumer aesthetics — all in service of your brand. From concept to commercialization, from lab to shelf, we help architect not just products, but sustainable growth for your brand.

4Unutra Delivery is Where Your Brand Story Begins.

- **End-to-End Expertise** — From R&D and regulatory guidance to custom formulation and scalable production
- **Quality You Can Trust** — Products that meet international standards and deliver consistent market appeal
- **Comprehensive Support** — We collaborate with retailers, health stores, e-commerce platforms, distributors, and brand owners to bring innovative supplements to market

Contact Us 

Home: www.4unutra.com

Email: info@4unutra.com

Te1: +86 0898 6537 8036

Phone: +86 193 8998 4020

4Unutra(Hainan) Co., Ltd

No.181 Xingyang Avenue,

Jiangdong New

District, Haikou, Hainan, China