



What's Keeping Consumers Up at Night?

Rising Sleep Quality Concerns and Their Interconnection with Stress and Mood

Adults around the world believe good sleep matters but, unfortunately, most are not getting it. A recent *ADM Outside VoiceSM* study has illuminated a confounding obstacle: even though consumers recognize that a good night's sleep helps mitigate stress, daily stressors are preventing many of them from getting the rest they need. What's more, there is general recognition that sleep quality affects mental and emotional well-being¹.

With the growing awareness of the interconnection between sleep and overall wellness, more consumers are seeking support through foods, beverages and dietary supplements to help them get their zzz's. However, manufacturers must first understand *why* tired consumers feel unsatisfied with their sleep, stress and mood management and what specific support they seek from their wellness products.

Sweet Dreams for Sleep, Stress, Mood Support

The global desire for improved sleep, along with alleviating stress and supporting mental well-being, has created market opportunity focused on already popular formats. Familiar and tried-and-true ingredients such as melatonin, chamomile and lavender still resonate with consumers, but there is ample room for education on how emerging ingredients, particularly those that support the gut, also impact overall well-being.



Top Ingredients When Choosing Products for Mental Well-Being¹:

- B Vitamins
- Omega-3 Fatty Acids
- Protein
- Probiotics/Postbiotics
- Prebiotics/Fiber



Top Ingredients When Choosing Products for Sleep & Stress¹:

- Chamomile
- Magnesium
- Melatonin (only for sleep)
- B, C, D Vitamins
- Lavender



Formats in Which Consumers are Interested for Supporting Sleep, Stress & Mood¹:

- Ready-to-Drink Tea
- Baked Goods/Cookies
- Gummies
- Smoothies/Shakes
- Snack Bars
- Pills, Capsules, Tablets



Counting on Biotics Instead of Counting Sheep

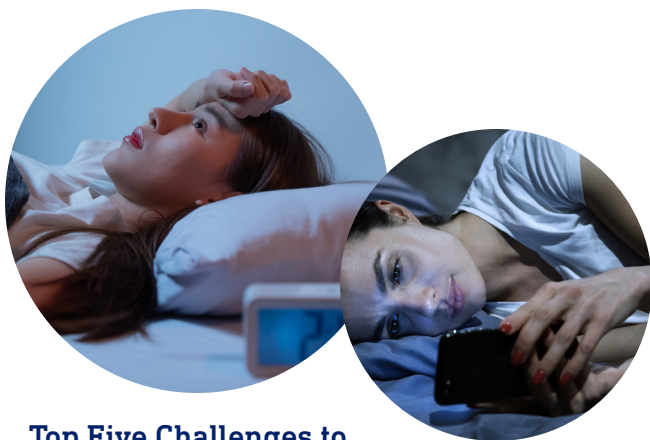
While botanicals, vitamins and minerals currently dominate the sleep, stress and mood categories, more and more consumers are starting to understand that biotics may be the next secret to success. There is huge opportunity for consumer education on biotics in this burgeoning category. Additional ADM research on consumer perceptions of biotics finds that over **90% of consumers in the US** are aware of probiotics, and 58% are aware of postbiotics².

Postbiotics' Time to Rise and Shine

When given the definition of both, **81% of US consumers** believe postbiotics can offer similar benefits as probiotics². The top benefits associated with biotics are digestive health, immune health and energy support, indicating a growing understanding of the various benefits these solutions can offer². The increased awareness of postbiotics is also significant, as new product innovation can benefit greatly from postbiotics' ability to retain efficacy through various formulation environments, extending product development possibilities beyond traditional probiotics.

The Sleep Satisfaction Gap

A majority of global consumers agree sleep quality directly affects how they feel throughout the day and their overall quality of life (76% and 74%, respectively)¹. Yet less than half say they usually feel refreshed when they wake up, with 48% sharing that they feel sluggish or tired throughout the day¹. This can impact mood, ability to cope with stressors and sustained energy levels.



Top Five Challenges to Achieving a Good Night's Sleep¹:

1. Feelings of stress or anxiety
2. Difficulty falling or staying asleep
3. Screen time before bed
4. Physical pain or discomfort
5. Inconsistent sleep schedule

Regional differences exist: consumers in **North America** struggle the most with stress-related sleep disruptions (47%), while those in **South Korea** cite pre-bed screen time (42%) as their biggest disruptor¹.

Consumers are motivated by goals of reducing stress, improving long-term physical health, increasing their daily energy levels and supporting mood and emotional regulation. And what's their top motivation for improving their sleep? To enjoy a better quality of life overall.

This call for enjoyment influences format choice and ingredient usage. Ready-to-drink (RTD) tea is the top format consumers would like to see specifically designed to help support sleep, closely followed by baked goods. And when flipping over product packs and turning around bottles, consumers continue to seek ingredients they already associate with soothing properties and sleep support, like melatonin and chamomile.

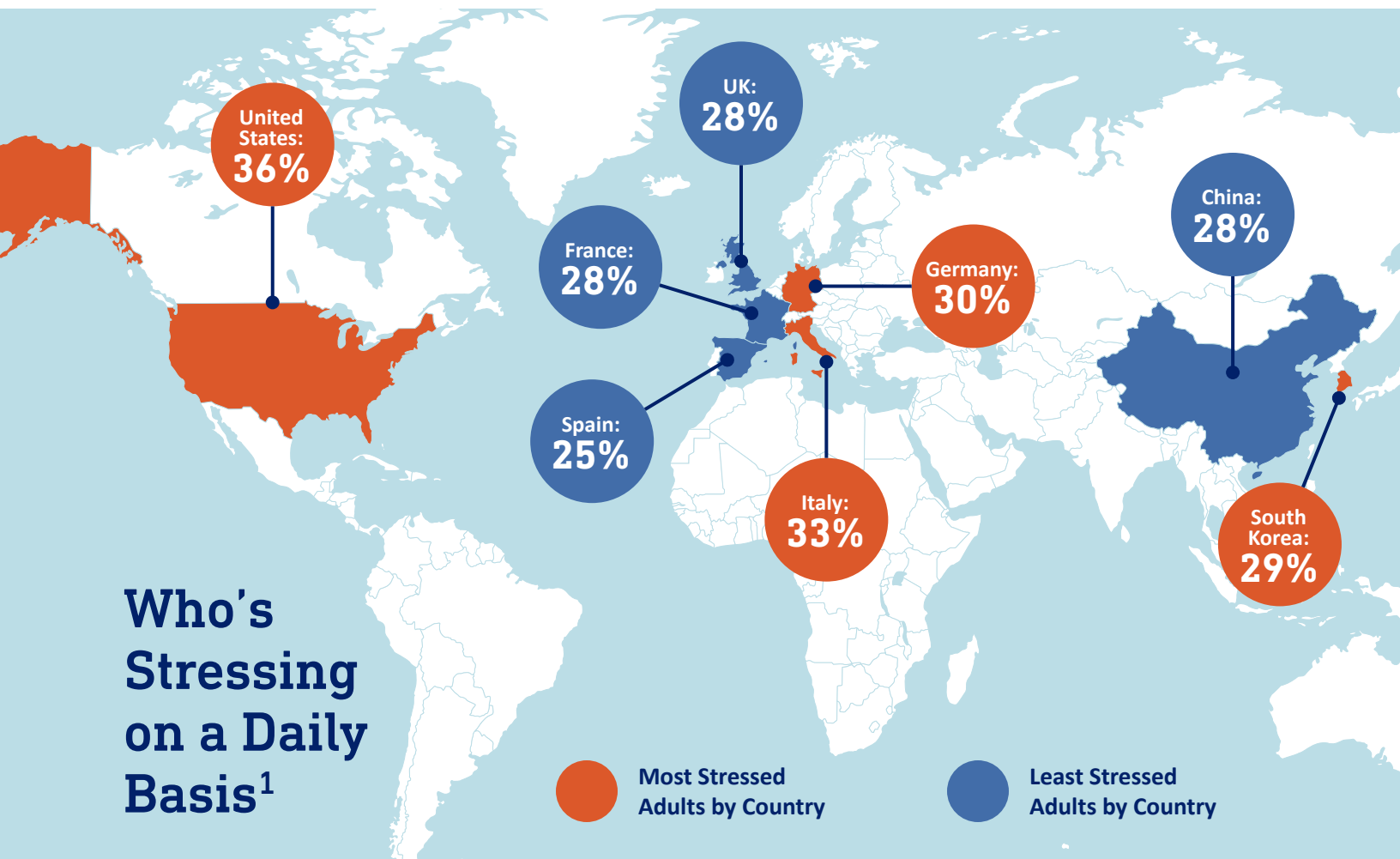


The Bottom Line:

68% of consumers are interested in ways to support their sleep, with nearly half (49%) willing to pay for effective solutions¹.

Stress Test: Many Consumers Feel the Pressure

Across regions, 30% of consumers state they feel extremely or very stressed on a daily basis¹. Additionally, 51% of consumers feel slightly stressed daily. Personal stressors, including health, financial and family concerns, outweigh those caused by work or school pressure¹. While it is true that low stress levels may be helpful for productivity, prolonged high stress levels can be detrimental to both physical and mental well-being over time.



The Sleep-Stress Paradox

Nearly 60% of global consumers agree that improving their sleep would significantly reduce their current levels of stress. However, only 29% of consumers say they are working on improving their sleep habits or routines to manage their stress¹. At the same time, high stress diminishes sleep quality, and 61% of consumers agree their stress levels directly affect their sleep¹. This recognition peaks in South Korea, where 72% of adults say their stress levels directly impact their sleep quality¹.



Wide Awake to Mental Wellness Needs

Over 70% of global consumers acknowledge the impact their mental well-being has on daily functioning¹. While this belief is present in all countries surveyed, it is particularly notable in **South Korea** (85%) and **Spain** (74%). Most consumers also recognize sleep quality directly affects their mental well-being¹.

Despite this awareness, only around two-thirds of global respondents state they are satisfied with their mental wellness¹. The most common approach being taken to address mental well-being is physical exercise or movement, followed by improving sleep habits or routines.

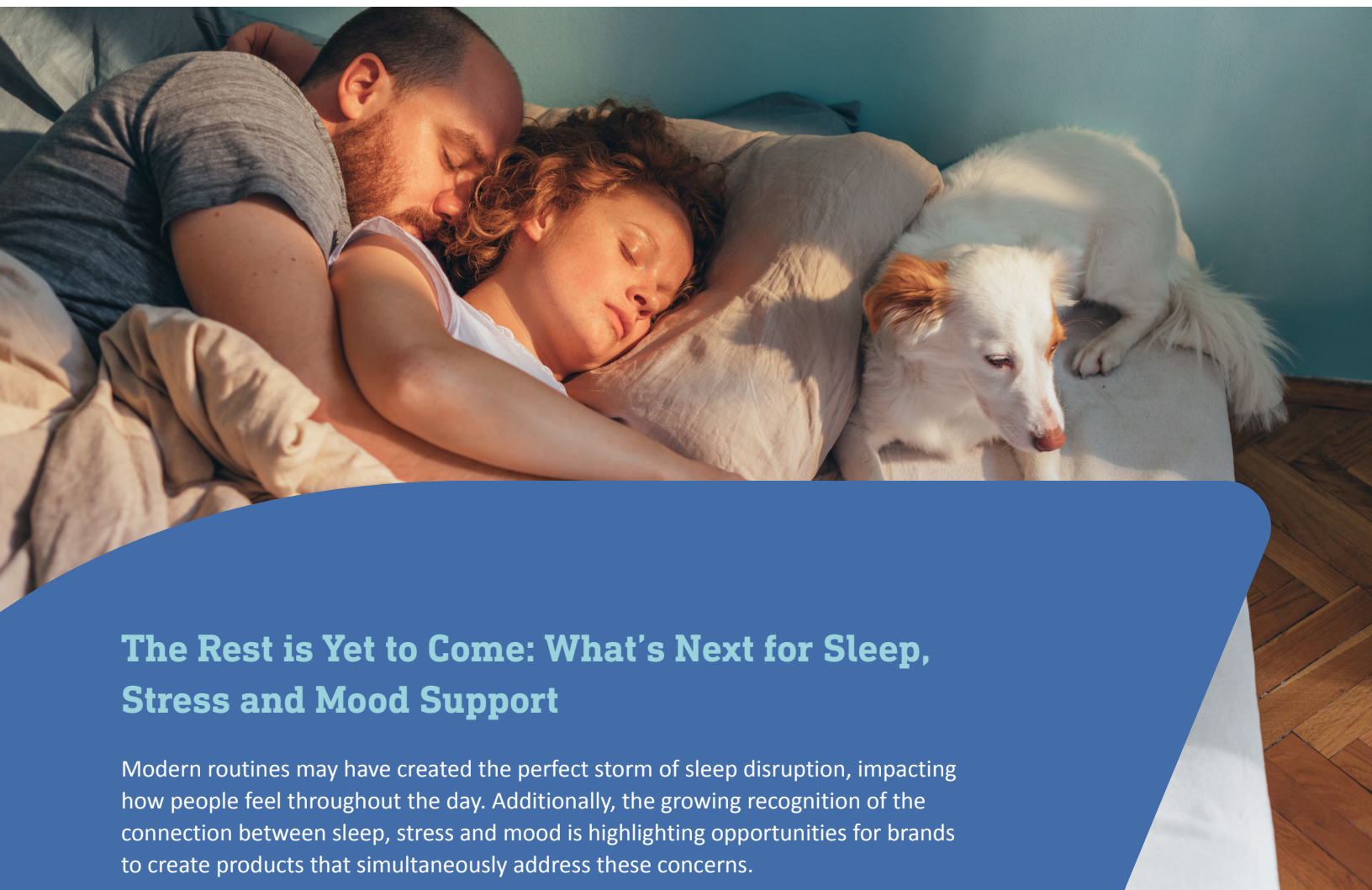
Just over 20% of consumers are adjusting their routines through dietary changes or by using supplements¹. This, along with the correlation between mental well-being and sleep quality, indicates an opportunity for functional food brands to fill a critical whitespace with tailored wellness solutions that address restfulness and, in turn, influence day-to-day mood management.

Formats to support mental well-being must be convenient, which is reflected in the products consumers are most open to trying, from RTD teas to gummies. If these options meet high sensory expectations, they're sure to encourage adherence.



Biotics on the Mind:

Respondents in **China** indicate the greatest interest in probiotics/postbiotics (43%) and prebiotics/fiber (45%) in mental well-being support products, far exceeding the global average of 20%¹. This further signifies growing curiosity of biotics in connection with various aspects of well-being among different regions.



The Rest is Yet to Come: What's Next for Sleep, Stress and Mood Support

Modern routines may have created the perfect storm of sleep disruption, impacting how people feel throughout the day. Additionally, the growing recognition of the connection between sleep, stress and mood is highlighting opportunities for brands to create products that simultaneously address these concerns.

Rather than leaving consumers tossing and turning, ADM scientists and researchers around the world are committed to exploring new health solutions, including those supporting improved sleep, stress and mood.

In 2025, ADM introduced an innovative postbiotic to its portfolio, *Lactobacillus gasseri* CP2305, with robust clinical research related to sleep quality, stress- and mood support^{3,4,5}. Resilient postbiotics like *L. gasseri* CP2305 can be incorporated into on-trend and emerging formats to meet consumers where they are on their wellness journeys, and to help them get some sleep.



SOURCES:

¹ADM Outside Voice™, Sleep, Stress & Mood Evaluation & Management, 2025

²ADM Outside Voice™, Postbiotics Survey, 2024

³Nishida, K., et al., (2017) *Journal of Applied Microbiology* 123:1561-1570

⁴Nishida, K., et al., (2017) *Journal of Functional Foods* 36:112-121

⁵Nishida, K., et al., (2019) *Nutrients* 11:1859