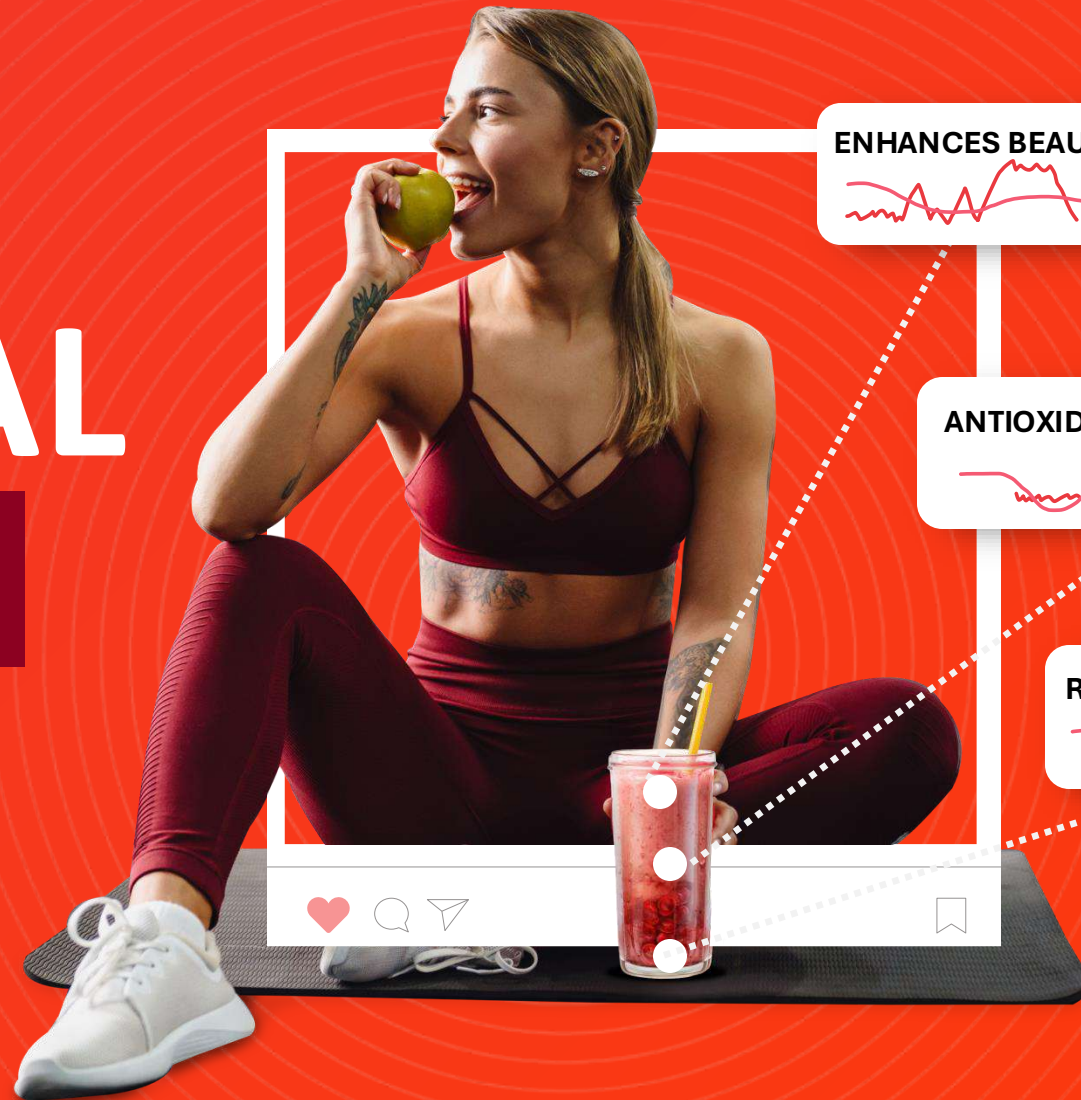


# FUNCTIONAL BEVERAGES

and the **Future of Hydration**



ENHANCES BEAUTY +42%



ANTIOXIDANTS

+14%



REJUVENATES

+13%



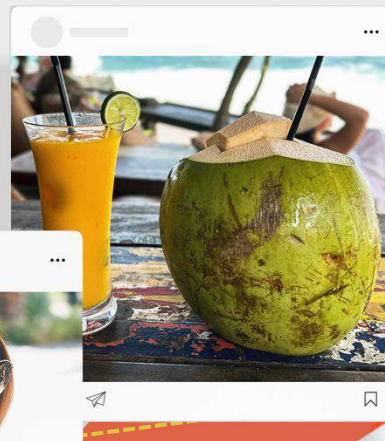
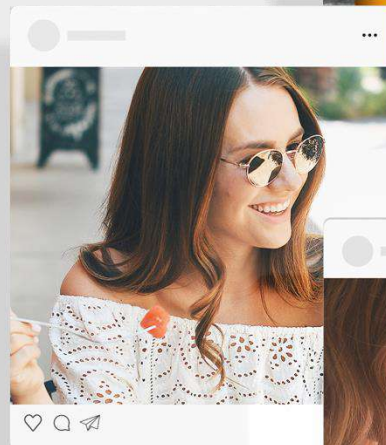
# We are Black Swan Data

The insights inside this report do not come from surveys, panels or focus groups. There are no questions asked. Nor any prompted responses.

Our technology applies AI and predictive analytics to millions of social and online posts to understand consumer behavior.

It identifies, connects and predicts future consumer needs and emerging trends with **89%** accuracy.

Leading CPG brands are leveraging this data to make faster, more confident, evidence-driven decisions along each stage of the innovation process.



# Our data explained

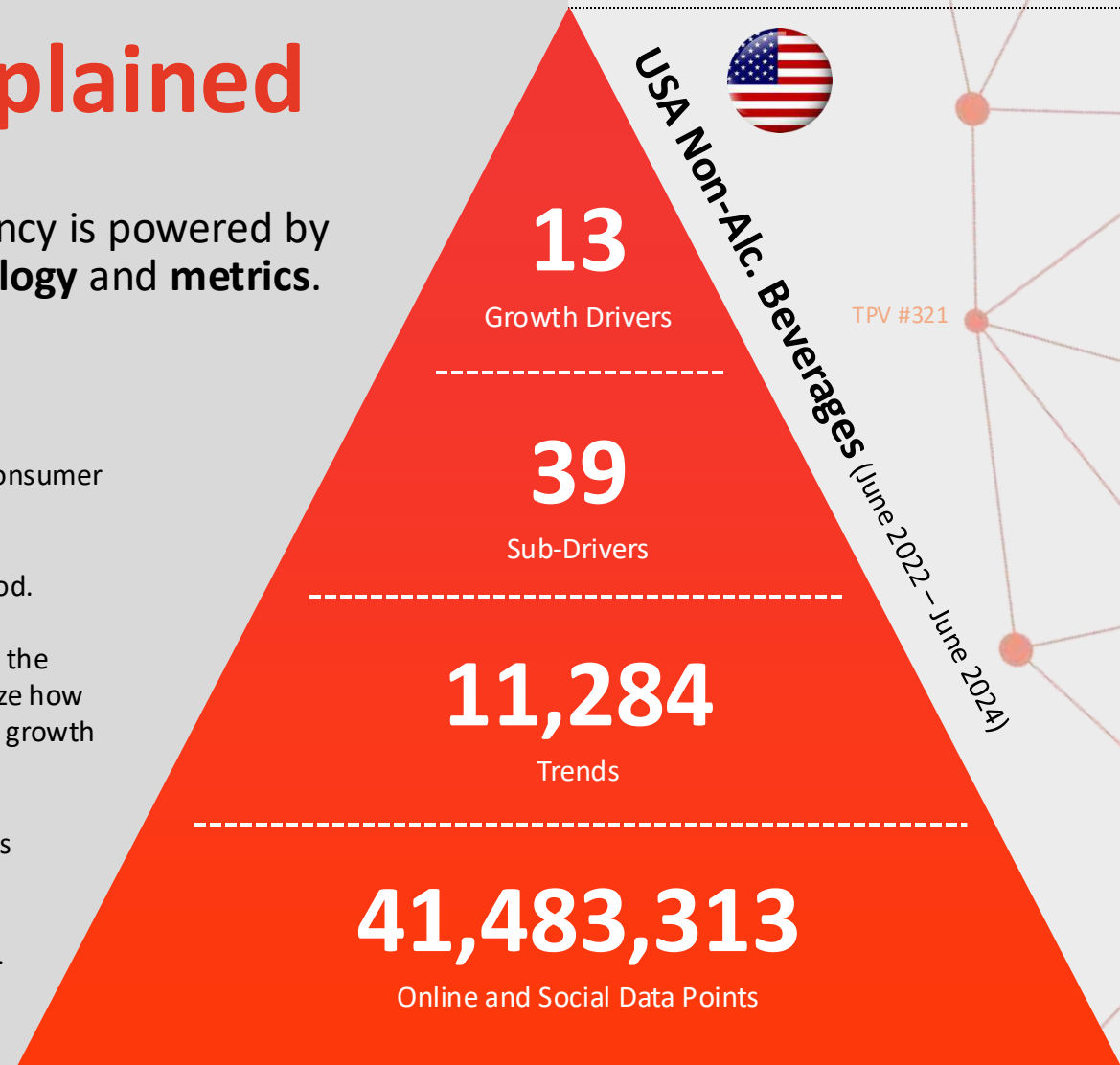
Our platform and consultancy is powered by our unique **data, methodology** and **metrics**.

## How does it work?

Our platform retrieves all the relevant consumer posts within a category; in this example, **41+ million** posts about **Non-Alcoholic Beverages** in the **USA** over a 2-year period.

We use AI and data science to isolate all the individual trends and behaviors to analyze how they cluster and ladder-up into category growth drivers.

This dynamic segmentation framework is refreshed monthly and evolves as categories and consumers evolve - keeping your insights fresh and relevant.



TPV #24

## Metrics

### Trend Prediction Value (TPV)

Ranks trends based on future growth potential.

### Volume

Total number of unique posts over a 2-year timeframe.

### Growth

The year-on-year increase or decrease in conversation around a trend.

TPV #4





# What's driving growth?

Our data has mapped **13 key drivers of growth** in the USA Non-Alc. Beverages category and ranked them by their future relevance.

Many of these drivers relate to more functional needs, such as **Energy** and **Keeping a Sharp Mind**.

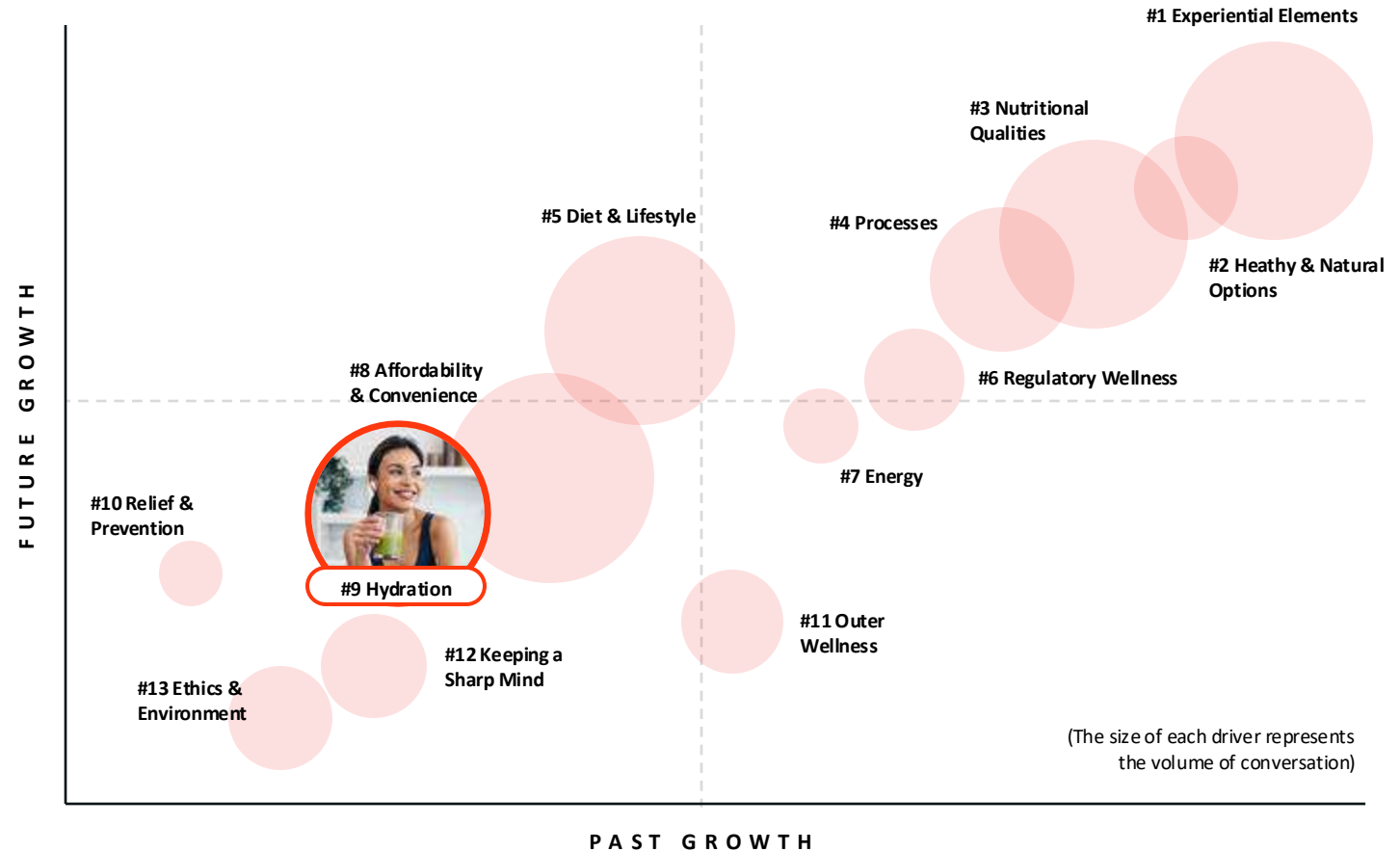
In this report, we're going to focus on **Hydration**.

It's the most fundamental consumer need in the category. But as our data reveals, the hydration driver is ranked **#9**, suggesting interest and growth in this space is stagnating.

This is despite brands like **Prime**, **Liquid IV** and a range of NPD launches entering the market in recent years.

We will explore what's happening in the crowded hydration space and explore how brands can grow in this territory in 2025+.

Growth Drivers, USA Non-Alc. Beverages, June 2022 – June 2024



# Hydration

## Now and next

The emerging trends in this space reveal that consumers are looking for **extra functionality** from their hydration drinks.

We've mapped and grouped the key **Themes** and **Benefits** that consumers associate with Hydration onto a Maturity Curve.

This helps us understand which trends should be acted on now or in the future.

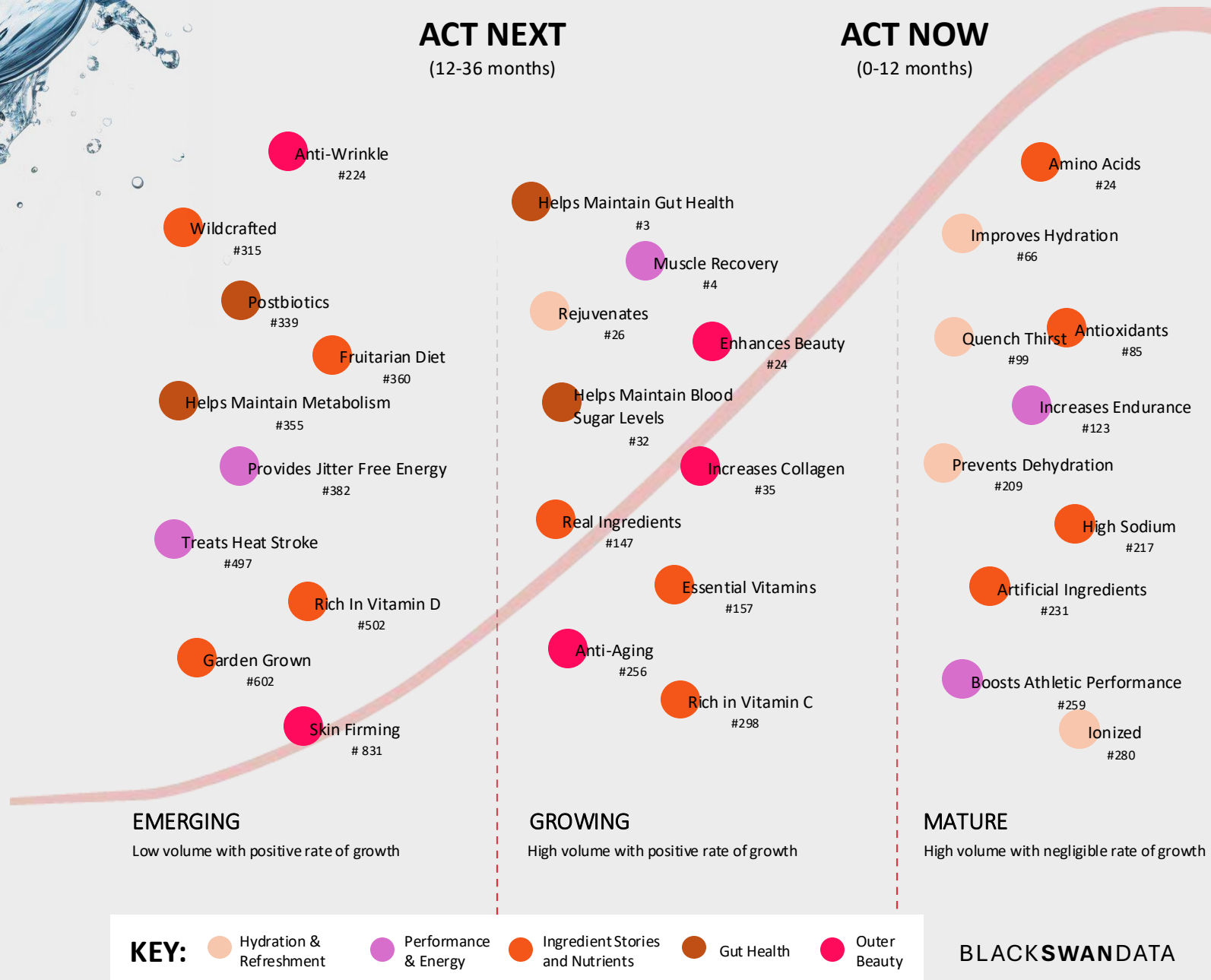
In the Mature phase, we can see performance and energy-related trends, such as **Boosts Recovery**.

As well as expected trends like **Quenches Thirst** and **Prevents Dehydration**.

But trends connected to **Outer Beauty** and **Gut Health** are beginning to emerge in this space too.

Consumers are choosing beverages that offer specialized claims and go beyond basic hydration.

We're going to explore the movement towards drinks that deliver beauty benefits.



# Skin v Refreshment

Consumers are realizing that their favorite beverages are having an **adverse impact on their skin.**

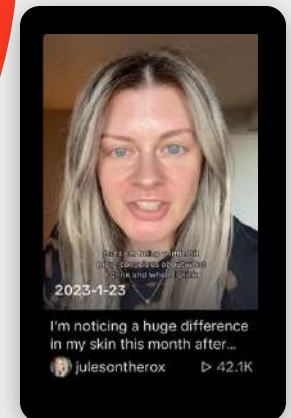
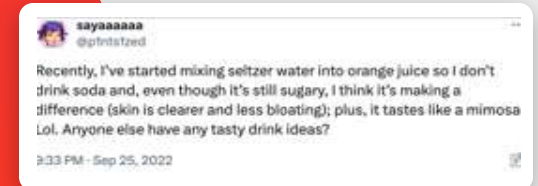
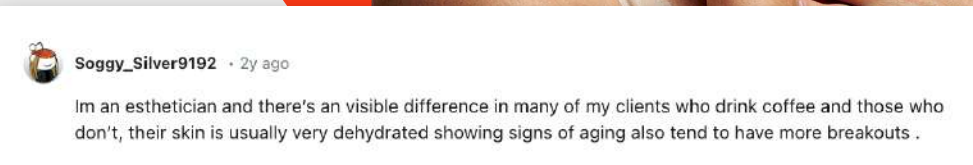
Sports drinks and sodas are tasty but high in sugar and other harmful ingredients. It's wreaking havoc on their complexion.

These drinks are also dehydrating - causing acne, blemishes, dry skin as well as wrinkling and other signs of aging.

Even drinks with specific hydration benefits are packed with additives and artificial ingredients. So are bad for the skin.

Consumers are connecting improper hydration with their skin health and wider health issues.

They are demanding beverages that are tasty, refreshing but good for their skin.





# Skin-loving beverages

Consumers are searching for hydrating beverages with **natural, active ingredients** that help the health and appearance of their skin.

Demand is growing for hydration solutions that promote healthy aging and skin vitality with *no nasties*.

They are creating their own DIY beverages to be in control of the content of their drinks.

This includes adding supplements like collagen to infuse drinks with skin benefits.

They are turning away from sodas and other sugary beverages, and intentionally choosing options with natural, clean and water-dense fruits and vegetables.

Consumers are also using hydration packets and powders to imbue beauty-enhancing qualities to everyday beverages.

## Trends associated with Hydration and Outer Beauty

### Anti-Aging

TPV #256  
Vol: 248  
Growth: +27%

### Increases Collagen

TPV #35  
Vol: 706  
Growth: +11%

### Real Ingredients

TPV #147  
Vol: 2,801  
Growth: +18%

### Enhances Beauty

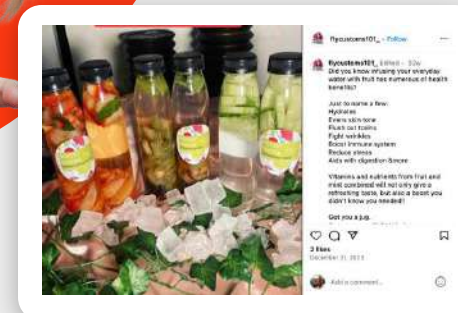
TPV #24  
Vol: 534  
Growth: +42%

### Skin Firming

TPV #831  
Vol: 10  
Growth: +16%

### Anti-Wrinkle

TPV #224  
Vol: 255  
Growth: +13%




# Innovation springboard


Using our data, we've put together a springboard of **products**, **ingredients** and **benefits** associated with the emerging skin and beauty needs in the **Hydration** space. These trends can be the building blocks for a new functional beverage product that promotes skin vitality.




**BENEFITS**

 **Enhances Beauty**  
TPV #24  
Vol: 534  
Growth: +42%

 **Anti-Ageing**  
TPV #256  
Vol: 248  
Growth: +27%


 **Revitalizes**  
TPV #70  
Vol: 8,659  
Growth: +21%

 **Prevents Dehydration**  
TPV #209  
Vol: 917  
Growth: -14%

**THEMES**


 **Clean Ingredients**  
TPV #70  
Vol: 1,833  
Growth: +20%

 **Rich in Vitamin C**  
TPV #298  
Vol: 1,262  
Growth: +19%


 **Electrolyte-Infused**  
TPV #453  
Vol: 178  
Growth: +39%


 **Fruitarian Diet**  
TPV #360  
Vol: 601  
Growth: +42%

**PRODUCT FORMATS**


 **Electrolyte Drops**  
TPV #89  
Vol: 1,131  
Growth: +43%


 **Tropical Fruit Tea**  
TPV #1646  
Vol: 51  
Growth: +72%

 **Vitamin Water**  
TPV #1054  
Vol: 25,810  
Growth: -2%

 **Alkaline Water**  
TPV #771  
Vol: 25,030  
Growth: +19%

**FUNCTIONAL INGREDIENTS**


 **Collagen Peptide**  
TPV #49  
Vol: 3,970  
Growth: +1%


 **Vitamin B7 (Biotin)**  
TPV #126  
Vol: 3,662  
Growth: +15%

 **Aloe Extract**  
TPV #1532  
Vol: 130  
Growth: +19%

 **Acerola Cherry**  
TPV #390  
Vol: 656  
Growth: +12%

**FLAVORS**

 **Cucumber**  
TPV #1073  
Vol: 100,165  
Growth: -9%

 **Guava**  
TPV #771  
Vol: 21,198  
Growth: -7%

 **Lemon Berry**  
TPV #826  
Vol: 1,846  
Growth: +11%

 **Basil**  
TPV #811  
Vol: 32,345  
Growth: -9%



# New product concept

Introducing **Hydra Glow Drops**, an on-the-go hydration solution with skin-boosting properties.

This new product idea brings together the **Electrolyte Drops** format and functional ingredients to hydrate the body and skin.

These drops can be added to transform a regular drink into a beauty-enhancing beverage.

It contains **Collagen Peptide** and **Vitamin B7**, powerful ingredients that act against signs of aging and bring out a radiant, glowing complexion.

It's infused with **Lemon Berry** for a natural, un-artificial flavoring.



## Themes

### Fruitarian Diet

TPV #360  
Vol: 601  
Growth: +42%

### Clean Ingredients

TPV #70  
Vol: 1,833  
Growth: +20%

## Benefits

### Anti-Ageing

TPV #256  
Vol: 248  
Growth: +27%

### Enhances Beauty

TPV #24  
Vol: 534  
Growth: +42%

## Product Format

### Electrolyte Drops

TPV #89  
Vol: 1,131  
Growth: +43%

## Ingredients

### Collagen Peptide

TPV #49  
Vol: 3,970  
Growth: +1%

### Vitamin B7 (Biotin)

TPV #126  
Vol: 3,662  
Growth: +15%

## Themes

### Lemon Berry

TPV #826  
Vol: 1,846  
Growth: +11%

# Want the full picture?

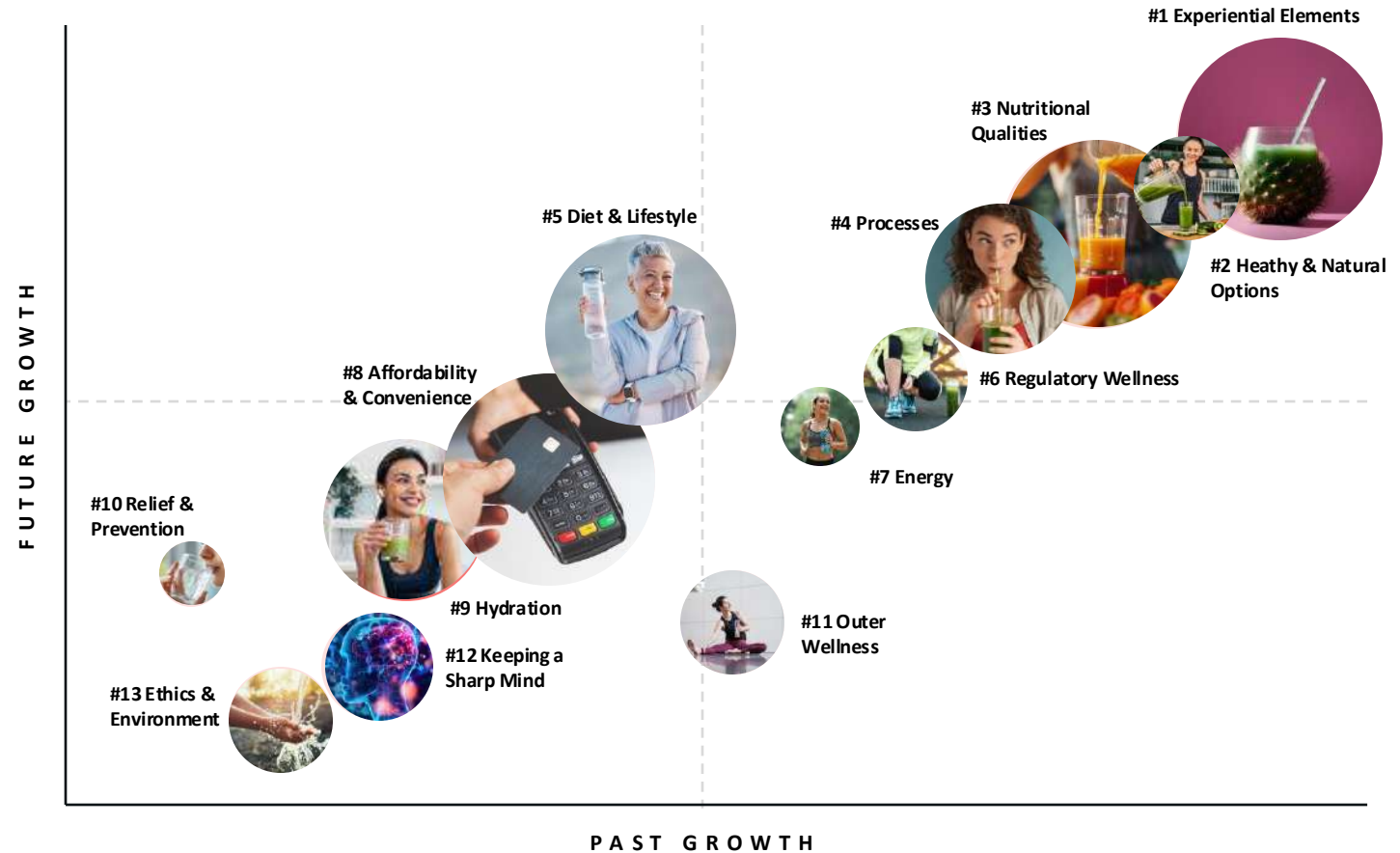
In this report we've only analyzed **1 of 13** growth drivers in the USA Non-Alc. Beverages landscape.

From **Gut Health** to **Energy**, the impact of **Ozempic**, or **cross-category** trend influences – we can help answer your burning insight questions.

If you would like to explore the emerging trends and opportunities across any of the other drivers, get in touch.

We can also map your brand, portfolio or demand spaces to this framework to analyze and determine 'where to play' and 'how to win' in 2025+.

Growth Drivers, USA Non-Alc. Beverages, June 2022 – June 2024



# Insight & Innovation solutions that fit your needs

We've only just scratched the surface of how our data and prediction metrics can **identify growth drivers, emerging trends and innovation opportunities** in the Beverages category.

Our **expert consultancy** and **self-serve platform** deliver the agility and answers our customers need in an increasingly challenging marketplace.

To find out how we can **kick-start your innovation process**, please get in touch.



## Strategic Consultancy

Lean on our expert consultants to jumpstart your insights transformation and apply the power of our data to answer your key business questions, including:

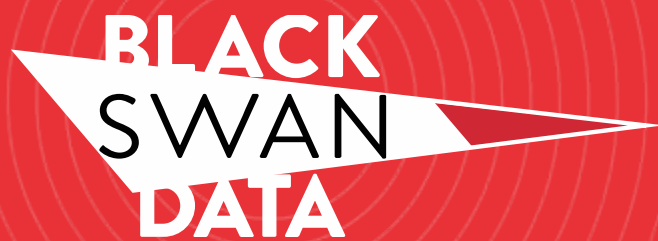
- Future of Category Landscape Mapping
- Activating Demand Spaces
- Ideation and NPD Springboards



## Always-On Data

- Never miss a trend again with AI-powered predictions at your fingertips
- Our platform powers key tasks along the innovation process with evidence and predictive decision metrics
- Delivers enterprise-wide competitive advantage through smarter, timely, more consumer-centric innovation programs





**Author:**  
Danika Gloege  
Insights Director

## See the data in action

Visit **blackswan.com** or **book an intro** with one of our Insight and Innovation experts to understand how 50+ of the world's leading consumer goods companies are using our predictive, social intelligence to win in their categories.

**[BOOK HERE](#)**



**PEPSICO**



**General  
Mills**



**Nestlé**

**COTY**  
SINCE 1904



**HEINEKEN**