

# Identifying white-space opportunities in functional hydration



## Business need

A beverage company faced challenges with fragmented product launches, creating a unified market view and building a clear strategic direction. This made it difficult to identify high-value growth opportunities and expand beyond traditional water products in the global hydration market.

## What we provided

We delivered a structured three-step opportunity assessment across seven key markets to uncover growth potential in the hydration space.

First, we analysed the competitive landscape, measuring market size, brand shares and growth trends across 11 functional health aspects. Second, we captured consumer insights through a custom survey, uncovering motivations, behaviours and unmet needs across hydration segments. Finally, we mapped existing product offerings against consumer health concerns to identify gaps, white-space opportunities and potential areas for product marketing claims and innovation.

## Client outcome

Highlighting these opportunities enabled the company to identify high-value growth areas, actionable opportunities and tailored market approaches in the hydration category, supported by deeper consumer and competitive insights.

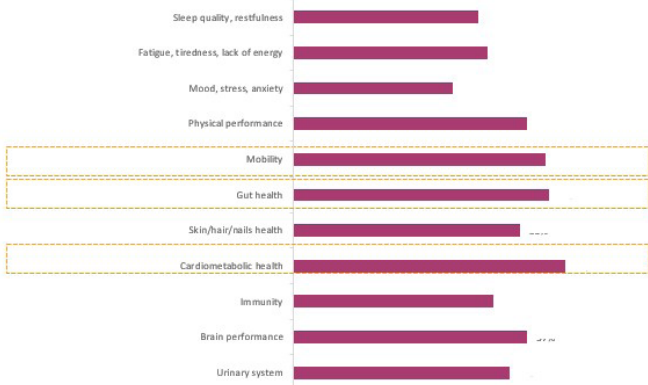
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# Consumption of functional beverages remains low, yet two of the top three health aspects are the same as those of water

## Drink more water

Q: You selected that you have tried to improve in the past 3 months, what actions are you doing to improve this concern.

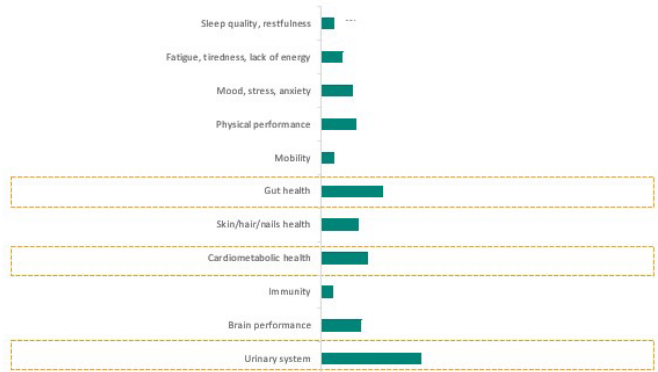
TOP3 health aspects: *Cardiometabolic, Gut and Mobility*



## Drink more functional beverages

Q: You selected that you have tried to improve in the past 3 months, what actions are you doing to improve this concern.

TOP3 health aspects: *Urinary, Cardiometabolic, Gut*



# In China, both vitamin and still water rank among the top five beverages consumed for health improvement

Functional Drinks Size by Benefit 2024



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