

# ATTITUDES AND TRENDS IN AYURVEDIC BPC – INDIAN CONSUMER – 2024

Ayurveda's declining share in BPC launches calls for innovation. Consumers swear by its safety, but are wary of its suitability for all skin types; the key to growth lies in exploring newer categories and lesser-known benefits.



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# Report Content



## EXECUTIVE SUMMARY

- Mintel's perspective
- Key issues covered in this Report
- Overview
- Ayurveda's share in BPC innovation activity is declining
- The outlook for the Ayurvedic BPC category in India
- Tailor Ayurvedic skincare to different skin types
- Ingredient watch: regional nuances in interest in using Ayurvedic ingredients
- Ingredient watch: opportunities lie in delivering lesser-known benefits and exploring applications in newer categories
- Shifting focus on Ayurvedic colour cosmetics
  - Graph 1: Ayurvedic BPC launches, by select sub-category, 2014-24
- Long-lasting, visible results are key drivers of consumer satisfaction

## KEY TRENDS AND MARKET FACTORS

- What you need to know

### The rise of the 'skintellectual' BPC consumer

- Skincare gains prominence among Indians
- A growing appetite for tailored BPC solutions
- Indian Ayurvedic brands address the need for tailored skincare inspired by tradition

### The evolving Ayurvedic BPC landscape

- The rise of ingredient-savvy Indians
- Rising ingredient interest leads to more experimentation and higher expectations
- The Ayurvedic beauty movement's evolution in India

### An increasing demand for efficacy

- The growing preference for proven efficacy in beauty
- Indian adults trust Ayurvedic ingredients to be efficacious
- Ayurvedic beauty brands respond to the need for efficacy

## WHAT CONSUMERS WANT AND WHY

- What you need to know
- Ayurvedic personal care outshines beauty and skincare

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- Graph 2: usage of beauty and personal care products with Ayurvedic ingredients in the last six months, by BPC category, 2024
- Graph 3: usage of beauty and personal care products with Ayurvedic ingredients in the last six months, 2024
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- Graph 4: Ayurvedic BPC launches, by select sub-category, 2014-24

## Ayurvedic skincare and women aged 18-24

- Women aged 18-24 lead in the usage of Ayurvedic skincare and beauty products
  - Graph 5: beauty and personal care products with Ayurvedic ingredients used in the last six months, by gender and age groups, 2024
- Women aged 18-24 prioritise safety and put their trust in Ayurvedic ingredients to deliver it
- Focus messaging on safety to reinforce Ayurveda's primary appeal
- The desire for results is more important than product composition
  - Graph 6: agreement that a beauty product's efficacy is more important than its ingredients, by gender and age, 2024
- Demonstrate efficacy to retain users
- Champion Ayurvedic ingredients that treat troublesome skin issues
- Ayurvedic products are seen as not ideal for every skin type
- Formulate Ayurvedic products for different skin types to drive differentiation
- Delve into the first principles of Ayurveda to innovate for different skin types
- Case study: Rasasara Skinfood offers Ayurvedic skincare tailored to specific skin types
- Expand Ayurvedic offerings to encompass bodycare

## Ingredient watch

- Potential to innovate with Ayurvedic ingredients beyond Aloe vera
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- Scientific names of Ayurvedic ingredients
- Turmeric is the most popular Ayurvedic ingredient among Indians
  - Graph 8: Ayurvedic ingredient usage in the last six months and interest in using in the future, 2024
- Regional nuances in interest in using Ayurvedic ingredients
- The Aspirationalists lead in the use of BPC products with Ayurvedic ingredients
  - Graph 9: usage of beauty and personal care products with Ayurvedic ingredients in the last six months, by Indian Beauty Persona, 2024

## Turmeric/*Curcuma longa*

- Despite being the most sought-after ingredient, turmeric's share of BPC innovation remains limited
  - Graph 10: interest in using select Ayurvedic ingredients in the future, by generation and region, 2024
  - Graph 11: total BPC launches with turmeric derivatives and their share of total beauty & personal care launches, 2014-24
- Beyond brightening and glowing benefits, consumers are talking about turmeric's soothing and healing properties

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- Spotlight turmeric's antioxidant and anti-inflammatory benefits
  - Graph 12: BPC launches with turmeric derivatives\*, by select beauty-enhancing and functional claims, 2020-24
- Hero turmeric to address specific skin issues beyond brightening
- Case study: La Pink champions the power of white haldi across BPC categories
- Turmeric is expanding into conditioner and sun care categories
- The 'skinification' trend opens the door for turmeric in new territories
  - Graph 13: beauty and personal care launches with turmeric derivatives\*, by category, 2020-24
- Evolution of the 'skinification' trend
- Case study: turmeric's skin-brightening properties can be extended to makeup
- Expand turmeric's scope in makeup beyond brightening to include skin-caring benefits
- Draw inspiration from global brands highlighting turmeric's dual benefits

## Saffron (aka kesar)

- Older Millennials and Gen Xers are particularly interested in using saffron-infused BPC products
  - Graph 14: total BPC product launches with saffron and its derivatives as ingredients, 2014-24
  - Graph 15: interest in using select Ayurvedic ingredients in the future, by generation and region, 2024
- Saffron's anti-ageing benefits are celebrated globally but remain under-tapped in India
  - Graph 16: BPC launches with saffron derivatives\*, by select beauty-enhancing claims, 2023-24
- Globally, saffron offers anti-ageing; in India, it is hailed for skin brightening
- Gen X and Older Millennial Indian women are embracing the signs of ageing
  - Graph 17: signs of ageing consumers are most concerned with, 2023
- Saffron holds potential to grow as an anti-ageing ingredient in India
- Deploy saffron to address a wide range of skin ageing concerns
- Steer communication towards saffron's potential to lower cortisol levels

## Cica/gotu kola

- Cica gained popularity in South Korea in 2016-17; India is now following suit
  - Graph 18: BPC products with cica derivatives as a share of total BPC launches, 2014-24
- Cica is recognised in APAC for its soothing and skin-repairing benefits
- Promote the benefits of cica using its Ayurvedic name: gotu kola
- Significant consumer interest in gotu kola hints at an opportunity to innovate
  - Graph 19: age distribution of total social media posts using search term 'cica' or 'gotu kola' or 'Centella asiatica', 2016-24
  - Graph 20: interest in using select Ayurvedic ingredient in the future, by select gender, age, region and Indian Beauty Persona, 2024
- Innovations featuring cica ditch haircare to strengthen the focus on facial skincare
  - Graph 21: BPC product launches featuring cica derivatives, by sub-category, 2019-24
- Launches of cica-infused sunscreens focus on soothing and calming benefits
- Cica ventures into colour cosmetics

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- Graph 22: BPC launches with cica derivatives\*, by category, 2019/24
- Offer soothing and anti-inflammatory benefits in colour cosmetics, using cica for sensitive skin
- Follow international brands' lead to highlight cica for its multiple benefits

## Ashwagandha/ginseng

- Ashwagandha is an emerging ingredient with untapped potential
  - Graph 23: BPC launches with ashwagandha derivatives\*, 2014-24
- Indian adults seek ayurvedic ingredients that promote beauty and wellness
  - Graph 24: agreement that Ayurvedic BPC products should work for both beauty and wellbeing, 2024
- Incorporate ashwagandha across BPC to address Indians' holistic wellbeing needs
- Leverage ashwagandha to balance the stress-sleep hormone cycle, contributing to better sleep
- Potential to innovate in skincare sub-categories by featuring ashwagandha
  - Graph 25: BPC launches with ashwagandha derivatives, by sub-category, 2019-24
- Leverage ashwagandha's benefits in skincare

## Amla

- Users maintain a strong interest in amla: a long-favoured ingredient in haircare
  - Graph 26: any interest in using amla ingredient in BPC products, 2024
- Brands pivot from haircare to explore amla's potential in other beauty and personal care categories
  - Graph 27: BPC product launches with amla derivatives\*, by category, 2019-24
- Unlock new avenues for innovation in oral hygiene with amla-infused products
- Illustrate how amla can keep gum disease at bay
- Explore new opportunities for amla in makeup

## User satisfaction with Ayurvedic BPC

- A large majority of users express satisfaction
  - Graph 28: overall satisfaction with Ayurvedic beauty and personal care products, 2024
- Long-lasting, visible results are key drivers of consumer satisfaction
- Key driver analysis – correlation analysis
- Leverage the strengths of high-performing and high-importance factors to attract and retain customers
- Focus on certifications and innovate with new ingredients
- Long-lasting results have the biggest correlation with satisfaction
  - Graph 29: overall satisfaction with Ayurvedic beauty and personal care products – key driver output, 2024
- Cultivate a longevity narrative to extend Ayurveda's long-lasting benefits
- Draw inspiration from global brands on skin and hair longevity
- Demonstrate visible results to ensure ongoing satisfaction with Ayurveda
- Promote safety, using certifications to improve Ayurveda's satisfaction score
  - Graph 30: agreement that there needs to be government regulation on ingredients used in beauty products, 2024
- Feature relevant Ayurvedic certifications to enhance satisfaction

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- Highlight clinical trials to reinforce Ayurveda's safety
- Cost is the primary dissatisfaction point with Ayurvedic BPC
  - Graph 31: any dissatisfaction with ayurvedic beauty and personal care products, 2024
- Offer smaller sizes
- Showcase how Ayurveda can offer quick results

### APPENDIX

- Consumer survey methodology
- Social data research methodology
- Key driver analysis – correlation analysis

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