

# BABY FOOD AND DRINK – INDIAN CONSUMER – 2019

Transparency of ingredients, production techniques and nutritional benefits in familiar formats will drive growth in India's packaged baby food market.



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# Report Content

## EXECUTIVE SUMMARY

- What you need to know – Summary
- Grow India's baby food market with more options and "cleaner" offerings
- Increase baby food product diversity as well as visibility in stores in light of the advertising ban
- Drive growth of packaged baby food with "clean label" claims
- Expand India's baby food space with more options in complementary foods
- What it means

## KEY TRENDS

- What you need to know

### Key drivers

- APAC retail market overview: baby milk & food, 2018
  - Graph 1: Retail volume sales growth year-on-year, baby food, 2013-17
- Growth in India's baby food market is slowing down
- Use clean label launches to address mistrust towards packaged baby food in India
- India's blanket ban on advertising baby food makes it a tough market for companies

### Global trends and how they are playing out in India

- Be transparent about product features as brand mistrust grows over food safety concerns
- Consumers expect full transparency
  - Graph 2: Select features actively looked for on packaged food/drinks product labels, February 2018

## CONSUMER INSIGHTS

- What you need to know

### What Indian babies are being fed

- Indian mothers mainly give their babies homemade food
  - Graph 3: Items fed to youngest child before they turned 2 years, May 2018
  - Graph 4: Regional breakup of types of food given to babies under 2 years, May 2018
- Nestlé's campaign promotes breastfeeding for longer and calls out the need for a strong family support system
  - Graph 5: Types of packaged food given to babies aged 0-2 years, May 2018

### The case for clean label

- Graph 6: Top tasks women with children aged 0-4 want help with, May 2018

- Graph 7: Agreement with select statements regarding recommendations about food given to babies, May 2018
- Graph 8: Agreement with statements about the quality of packaged baby food, May 2018
- Showcase nutritional benefits, speed of preparation on-pack to appeal to young mothers

### What mothers want

- Graph 9: Purchase motivators linked to ingredient features, May 2018
- Make baby food available in affordable, smaller packs to encourage more frequent purchase
- Graph 10: Purchase motivators for packaged baby food linked to trust, May 2018

## MARKET APPLICATION

- Opportunity: Key areas of focus

### Opportunities

- Graph 11: Baby food launches by sub-category, 2018
- Locally made baby snacks will be more affordable for Indian parents
- Graph 12: Select clean label claims, baby food, 2015-18
- Graph 13: Select clean label claims, baby food, 2015-18
- Call out nutritional, functional benefits of packaged baby food on pack

### Who's innovating

- Indian startups offer fresh alternatives to established baby food brands
- Homegrown Indian brands are offering clean label options within baby food
- Play up the use of traditional grains, processing techniques
- Leverage the resurgence of traditional Indian grains, such as millets, in baby food
- Convenient travel-ready tubs can also help develop healthy eating habits
- Baby food as nutritious foods for mothers is an emerging claim

### Global innovators

- Promote vegetables in baby food as a route to healthy eating
- Premium infant formulas promoting enhanced nutrition, better absorption and milk source
- Baby food brands promote 'real ingredients' to convince parents of naturalness
- Gerber provides transparency on-pack

## APPENDIX

- Consumer survey methodology

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