

CLEAN BEAUTY – INDIAN CONSUMER – 2022

Provide a clearer understanding of clean beauty and guide the movement by using an ingredient-led approach and establishing it as being safer than regular beauty.



Tanya Rajani, Principal Analyst, Beauty & Personal Care, India



Clean Beauty - Indian Consumer - 2022

This report looks at the following areas:

- COVID-19's impact on clean beauty
- Key trends in the clean beauty movement in India and the key drivers impacting the movement
- Identifying potential clean beauty targets based on their attitudes towards clean beauty
- Identifying the different features consumers would pay more for in a clean beauty product
- Understanding the purchasing factors of beauty and personal care products
- Understanding the sources of information consumers use to learn about clean beauty
- Opportunities to build the clean beauty movement based on key consumers' attitudinal segments



Provide a clearer understanding of clean beauty and guide the movement by using an ingredient-led approach and establishing it as being safer than regular beauty.

Overview

Clean beauty is still a vague term within the industry, which is why many Indian consumers believe clean beauty is only a fad (59%) or a trendy label being used by brands (69%).

In light of the COVID-19 pandemic, health and safety have been brought to the fore, making consumers look for beauty products that are safer for their hair and skin. This shift in consumer behaviour can fuel the clean beauty movement in the country, as long as it can prove itself to be safer than regular beauty products.

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A key issue for clean beauty is that consumers do not have a clear understanding of the term. This suggests the necessity of setting up industry standards to guide companies/brands and engaging consumers through education, to give them a deeper understanding of clean beauty.

With Indian consumers continuing to veer towards the natural narrative, clean beauty brands have an opportunity to focus more on free-from claims and proving the authenticity of their ingredients to help kick off the clean beauty segment in the country.

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Report Content

EXECUTIVE SUMMARY

- What you need to know
- Mintel's perspective

Key issues covered in this Report

Market context

- Overview
- The impact of COVID-19 on clean beauty
- Clean-beauty-related claims are picking up pace in India
 - Graph 1: % of beauty and personal care launches by claim categories, 2018-Jun 2022

What consumers want and why

- Four consumer segments by attitudes towards clean beauty
- Four clean beauty consumer segments
- Consumers want: the natural narrative in clean beauty
 - Graph 2: the most important factors consumers consider when choosing a beauty and personal care product, 2021
- Consumers want: clean beauty to be proven safe
 - Graph 3: factors that motivate consumers to use sustainable beauty and personal care products, 2021
- Consumers want: clean beauty to have a clear purpose

Opportunities

- Build clean beauty by focusing on ingredients
- Establish clean beauty as being safer to use
- Provide a deeper understanding of clean beauty

Competitive landscape

- Indian DTC brands are leading the clean beauty movement in India

The impact of COVID-19 on clean beauty

- The marketing mix
- A promising future for clean beauty in India

KEY TRENDS

- What you need to know
- Without a standardised definition, clean beauty has latched on to the natural narrative in India

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- Clean beauty in APAC has yet to catch up to other regions
 - Graph 4: % of beauty and personal care launches by claim category, 2018-22
- India is beginning its clean beauty journey
- Indian clean beauty claims are on an upward trajectory
 - Graph 5: % of beauty and personal care launches by claim categories, 2018-22
- India has a ready audience for clean beauty
- COVID-19 has spurred homegrown DTC brands to make clean beauty claims

KEY DRIVERS

- COVID-19 has heightened the need for safety
- Increased internet consumption fuels beauty trends
- A lack of regulations causes ambiguity over claims

GLOBAL TRENDS AND HOW THEY ARE PLAYING OUT IN INDIA

- Safety is key but product efficacy is brought to the fore
- Transparency is elementary for clean beauty to succeed

CONSUMER INSIGHT

- What you need to know
- Natural and free-from narratives are ingrained with Indian consumers
 - Graph 6: most important factors consumers consider when choosing a beauty and personal care product, 2021
- Clean beauty blurs with natural
- Safety is a top-of-mind attribute, but including exotic natural ingredients makes it more enticing
- TURF Analysis – purchase factors for a clean beauty product
- Consumers struggle to identify clean beauty
- The need for a clearer definition positions clean beauty as just a trendy label

Introducing the four clean beauty consumer segments

- Four clean beauty consumer segments

Clean Beauty Supporters

- Clean Beauty Supporters (18%)
- Demographic profile of Clean Beauty Supporters
- Complete faith and trust in clean beauty
- Potential to move them up the natural scale towards organic
 - Graph 7: factors consumers consider when choosing a beauty and personal care product, 2021
- Self-preservation pushes them towards clean beauty

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- Graph 8: factors that motivate consumers to use sustainable beauty and personal care products, 2021
- Use advanced science and technology to promise greater safety
 - Graph 9: features that consumers would pay more for in a clean beauty product, 2021
- Leverage the support of modern channels of information
 - Graph 10: sources of information for clean beauty, 2021

Unenlightened Fence-sitters

- Unenlightened Fence-sitters (21%)
- Demographic profile of Unenlightened Fence-sitters
- Lack of clarity on clean beauty keeps them on the fence
- Prove to Unenlightened Fence-sitters that clean beauty is more effective and safer to use
 - Graph 11: consumers who have chosen 'neither agree nor disagree', for selected clean beauty statements, 2021
- In-store staff are the go-to for Unenlightened Fence-sitters

Regular Beauty Supporters

- Regular Beauty Supporters (22%)
- Demographic profile of Regular Beauty Supporters
- Regular beauty still holds court with them
- Use expert opinion to sway them towards clean beauty

Close-fisted Consumers

- Close-fisted Consumers (39%)
- Demographic profile of Close-fisted Consumers
- Most ignorant on clean beauty
- Not worth pursuing at the moment

MARKET APPLICATIONS

- Opportunities: key focus areas
- Opportunities for clean beauty consumer segments

Opportunities for Clean Beauty Supporters

- Build the organic proposition by giving more clarity to its meaning
- Case study: SoulTree – Ayurvedic, organic and ethical
- Use advanced science and technology to provide more transparency
- Live streaming provides authentic product transparency

Opportunities for Unenlightened Fence-sitters

- Bring clarity to the term with interactive conversations
- Start the 'what's-in-the-beauty-product' narrative
- Clearly link clean beauty to free-from claims

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- Use familiar ingredients and terms to ensure consumer comprehension
- Case study: provide simplified, dedicated content on clean beauty
- Raising awareness of certification marks
- Focus on category management to increase access to clean beauty
- Use in-store staff to help consumers understand clean beauty

Opportunities for Regular Beauty Supporters

- Prove natural authenticity to differentiate from regular beauty products
- Highlight exotic natural ingredients to help distinguish clean beauty from regular natural beauty
- Utilise an expert voice to give clean beauty credibility
- Leverage clinical studies to improve consumer trust

Who's innovating

- Provide education to help consumers make more conscious and healthy choices
- Clean beauty utilises a 'parent test' to make it suitable for children

Global innovations

- Clean beauty will eventually move beyond natural and focus on chemical ingredients that are safe

APPENDIX

- Consumer survey methodology

About Mintel India Consumer

Access our reports now and we'll tell you how major trends are affecting India. We also hone in on the regional differences from socio-economic groups to demographics such as age, gender and household composition. We research consumers in Metro and Tier 1 to 3 cities across the 4 main regions and in 6 local languages.

In each report, we're analysing the trends and the innovations, the behaviours and the influencers of consumers across India. Our local expert analysts then examining the primary research and consumer data and translating it into what it means for you.

- ✓ Find out what Indian consumers want, what they need and what influences their purchasing decisions.
- ✓ Understand the Indian market and see how it fits into wider trends on a local and global level.
- ✓ Take advantage of the gaps and opportunities that exist today, tomorrow and beyond.

How Mintel Indian Consumer will help your business grow:

01

Segment consumers across India according to their regional and demographic differences so you can target them more effectively.

02

Analyse the latest trends and innovations and see how they fit at a local level to identify opportunities for your next big idea.

03

See action-oriented summaries to understand an area quickly or investigate the data to get an in-depth understanding of your market.

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