

COLOUR COSMETICS: EYES – INDIAN CONSUMER – 2021

Fuel growth of the eye colour cosmetics category with added value in the form of convenience and multifunctionality under the 'next normal'.



A Mintel Analyst, Global Analyst



Report Content

EXECUTIVE SUMMARY

- What you need to know
- Mintel's perspective

Market context

- The impact of COVID-19 on eye colour cosmetics
- Offer convenience to reflect simplified beauty routine
 - Graph 1: ease of use claim in eyeshadow launches, April 2018–March 2020
- Tapping on emotional uplift with value

What consumers want and why

- Consumers want: ease of use
- Consumers want: multi-use makeup
- Consumers want: affordable pack sizes for trial

Opportunities

- Establish eye makeup as everyday wear with ease of use
- Deliver on convenience to popularise eye makeup sub-categories
- Expand repertoire via value offerings

Competitive landscape

- Rise of disruptive indie brands
- Marketing initiatives – eye makeup sees promotion

Mintel predicts

- Repositioning the eye makeup sub-category is the key to growth

THE IMPACT OF COVID-19 ON EYE COLOUR COSMETICS

- The outlook for Indian colour cosmetics
- The outlook for the Indian eye colour cosmetics industry
- SWOT analysis – eye colour cosmetics
- The marketing mix
- In summary: adapting to the 'next normal'

KEY TRENDS

- Eye colour cosmetics launches steadily declined
 - Graph 2: colour cosmetic launches, by sub-category, April 2018-March 2021
- Eyeshadow launches see a slight increase in the pandemic year
 - Graph 3: eye colour cosmetic sub-categories launches, April 2018-March 2021
- Convenience is on the rise
 - Graph 4: top five formats of eyeshadow launches, April 2018-March 2020
 - Graph 5: ease of use claim in eyeshadow launches, April 2018-March 2020
- Beauty products will recover along with consumers' sentiment
- Colour cosmetic recovery is fueled by lower-tier cities
- Consumers have come to reassess what value means to them

KEY DRIVERS

- Eyes are a major focus of Indian beauty standards, more so due to mask wearing
- The Indian beauty codes embrace the individual's real self
- Communication within the make-up category shifts to self-empowerment
- Eye makeup becomes simpler with fluttery eyelashes, simple liners and a touch of expressive colours
- Consumers are veering towards beauty and grooming products for gratification
- Colour in eye makeup is experimented with as an entertaining activity

CONSUMER INSIGHTS

- Eye makeup in India is highly penetrated as a category, but dominated by kajal
 - Graph 6: usage of eye colour cosmetics, March 2021
- Mascara and eyeshadow show higher usage decline
 - Graph 7: selected colour cosmetics products usage changed in 2020, compared to 2019, March 2021

'Value' in makeup comes through multi-use

- Multifunctionality amps up value for the eye colour cosmetics category
- TURF analysis – preferences for eye colour cosmetics
- Expand Tier 1 and 35-44 year old target audiences' eye colour cosmetics routine with multifunctionality
 - Graph 8: multifunctional preference in eye colour cosmetics, by city tier, March 2021

Make eye makeup effortless with ease of use

- User-friendliness a key demand in eyeshadow – newer formats and formulations that promise ease of use will be desirable
 - Graph 9: agreement of attitudes towards colour cosmetics, by age, March 2021

- Easy to use is the key to daily usage and established regimen
 - Graph 10: factors in choosing colour cosmetics, March 2021
- Ease of use as a claim can grow usage of mascara

Encourage trial with mini sizes and value kits

- Encourage look exploration with smaller sizes' affordability
- Break purchase barrier with smaller ticket size and value kits

MARKET APPLICATIONS

- Accelerate under-leveraged eye colour cosmetics
 - Graph 11: colour cosmetic launches by sub-categories, April 2018-March 2021

Establish eye makeup as everyday wear with ease of use

- Use beauty bloggers to convey both inspiration and convenience
- Position a single-swipe mascara to create total eye makeup look
- Make eyeshadow more accessible through crayon and liquid
- Eyeshadow formats deliver on ease of application and promise minimal error

Deliver on convenience

- Liquid texture serves convenient usage without specialised tools
- Eyeshadows' innovative formats are convenience drivers
- Enhance convenience with applicators
- Gain innovation comprehension with simple illustration

Expand repertoire via value offerings

- Establish a distinct multi-use sub-category
- Maximise multi-use's flexibility to fit with various occasions
- Gain penetration under limited budget with small-sized and value kits
- Deliver value and expand usage rituals with value kits
- Recruit younger consumers with sachets
- Products with packaging innovations that extend shelf life and eliminate the use of additional tools

Who's innovating

- Convenience and multifunctionality innovations

Global innovation

- Brands focus 'above the mask' and hone in on eyes
- Pushing subtle colours for eye makeup in Japan
- Colour innovations focus on beautifying the eyes

APPENDIX

- Consumer survey methodology

About Mintel India Consumer

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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.

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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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