

JUICE – INDIAN CONSUMER – 2018

India is one of the fastest growing retail juice markets, and this will only be enhanced through innovation incorporating greater freshness and health benefits.



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Report Content



EXECUTIVE SUMMARY

- What you need to know – Summary
- Promote freshness and health benefits to keep growth in India's packaged juice market high
- Communicate juice's potential as a mealtime companion
 - Graph 1: Juice consumption occasions, May 2018
- Specify health benefits of packaged juice on-pack as Indian consumers become more health-aware
- Introduce greater aspects of freshness within packaged juices to increase acceptance among Indians
- Remove the impact of seasonality by offering different products for different seasons
- What it means

KEY TRENDS

- What you need to know

Key drivers

- India is among the fastest growing packaged juice markets globally
- India's juice market races past carbonated soft drinks as health awareness grows
 - Graph 2: Juice and carbonated soft drinks, retail market value, 2013-17
- As cold-pressed juice takes off in India, focus on chilled and super-fresh offerings in packaged formats
- India is the fifth largest market for cold-pressed juice launches
 - Graph 3: Share of cold-pressed juice launches by country, July 2015-June 2018

Global trends and how they are playing out in India

- Indian consumers seek self-improvement
- There are opportunities to help Indians with their healthy eating goals
- Food fortification becomes a priority for the Indian government, and can help the Indian nutritional profile improve
- 'Go local' to appeal to Indian consumers' sense of regional pride
- Juice brands in India look within for sourcing
- Cut down food waste through local sourcing in India
- Food waste has become a global consumer concern
- Take cues from brands in other markets on how to save fruit from going to waste

CONSUMER INSIGHTS

- What you need to know
- 75% of urban Indians say they have consumed juice in the three months to May 2018

Freshness

- Focus on freshness cues within packaged juice to appeal to Indian juice drinkers
- Fresh juice is the top competitor for packaged juices in India
 - Graph 4: Types of juice consumed in the last three months, May 2018
- Convey freshness through the use of in-season and local fruit
- Reach out to drinkers of only fresh juice with packaged products using in-season fruits
 - Graph 5: Interest in types of packaged juices, fresh-only juice drinkers vs packaged-only juice drinkers, May 2018
- Freshness comes at a price for consumers as cold-pressed juices establish themselves in India
 - Graph 6: Cold-pressed juice consumption, by income group, May 2018
- Leverage taste inconsistency as a means to highlight freshness and a 'no nasties' message
- Raw Pressery links difference in taste to seasonality of fruit in on-pack communication

Increasing consumption occasions

- Reduce distribution in the North and East of India as summer recedes
 - Graph 7: Agreement with 'I typically drink juice only during hot weather', May 2018
- Launch juices for colder seasons that can be consumed warm or include 'warming' ingredients
 - Graph 8: Interest in packaged juice for different types of seasons, May 2018
- Examples of winter juices
- Target young people in the South with meal accompaniment messaging on packaged juice
 - Graph 9: Juice consumption along with a meal, by region, age and gender, May 2018
- As consumers look to the past for remedies, incorporate familiar ingredients into juice for digestive appeal with meals

Health and wellness

- Health benefits will drive the consumption of packaged juices in India
 - Graph 10: Features that would encourage greater consumption of packaged juice, May 2018
- Textures will play a growing role in Indian consumers' perception of healthy and natural juices
- Use texture to help improve health perceptions of packaged juice, especially among parents
 - Graph 11: Agreement with 'Thicker juices are healthier than more liquid juices', by parental status, May 2018
- Promote suitability of packaged juice for kids through hygiene credentials
 - Graph 12: Juice consumption, by family member, May 2018
- Fill the gap in the Indian juice market for products with added nutrition
 - Graph 13: Plus claims in juices, July 2013-June 2018
- Reach out to consumers in the East and North with high-protein juices
 - Graph 14: Added protein as a purchase motivator for packaged juice, May 2018
- Reduce sugar content slowly and steadily to give time for tastes to adjust
- Low/no/reduced sugar claim sees consistent growth over the last four years
 - Graph 15: Growth in select L/N/R claims, July 2013-June 2018

MARKET APPLICATION

- Opportunities: Key areas of focus

Opportunities

- Juice drinks with fruit bits is an emerging category in India and one with room for growth
 - Graph 16: Juice and juice drinks texture claims, Jan 2016–Jun 2018
- Coca-Cola brings Rani Float to India, focuses on fruit bits
- Examples of how texture is communicated in India's juice market

Who's innovating

- Go for a minimalist approach in 'packaged fresh juice' as exemplified in Raw Pressery's ad
- Smoothies have potential to leverage texture to appeal to urban Indians
- Smoodies' range of smoothies
- Juice Matters launches juice range featuring seasonal fruits and vegetables
- Range of fruit and vegetable juices from Juice Matters
- Target consumers in the North and West with fresh vegetable juices
 - Graph 17: Interest in packaged juices made with vegetables, May 2018
- Organic, cold-pressed juice shots feature superfood ingredients
- Packaged shots have a potential audience among Indian consumers
- Ayurvedic triphala is a treasure trove for 'digestive health' learnings

Global innovators

- Smoothie bowls make an impression on Instagram
- True Fruits introduces Smoothie Bowls
- Juice shots offer a diverse array of functional benefits
- Ginger and turmeric star in juice shot innovation, with chilli emerging in 'hot shots'
- Protein-rich juice drinks are increasingly positioned as 'liquid snacks'

APPENDIX

- Consumer research methodology
- Definitions

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