

# JUICES – INDIAN CONSUMER – 2019

Introduce added health benefits and ethnic flavours to compete for fresh juice consumers.



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# Report Content

## EXECUTIVE SUMMARY

- What you need to know
- Focus on health benefits and flavours to compete with fresh juice
- APAC retail market overview: juice, 2019
- Consumption of packaged juices is low
  - Graph 1: Total volume consumption per capita, 2019 (projected)
- Adding value through functional and ethical claims
  - Graph 2: Top growing claim categories as a share of juice launches, Aug 2016-Jul 2019
- Go beyond conventional flavours
- Who are juice consumers?
- Play up hygiene, convenience and seasonality to compete with fresh juice
- Bring added value through fortification and sugar reduction
- Key takeaways

## KEY TRENDS

- What you need to know

### Key drivers

- ITC highlights the need for clean label
- Launch of ethnic drinks
- Entry of SIG Combibloc

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

- Full Disclosure
- Patriot Games
- Juices and beverage concentrates meet Mintel Trends

## CONSUMER INSIGHTS

- What you need to know

### Consumption behaviour

- Fresh juice has the highest penetration in India
  - Graph 3: Consumption of different types of juice, May 2019
- Regular consumption opens opportunity for more interactions



- Graph 4: Consumption of different juice types by frequency, May 2019
- Packaged options appeal more to younger consumers
  - Graph 5: Consumption of different types of juice by age group, May 2019
- Target lower tiers with seasonality
  - Graph 6: Consumption of different juices by city tier, May 2019
- Utilise the north as a test market for innovation
  - Graph 7: Consumption of different juice types by region, May 2019
- Position vegetable juices for children
  - Graph 8: Consumption of different juice types by parent status, May 2019
- Juices for children
- Occasions for consumption
  - Graph 9: Occasions for consumption by city tier and region, May 2019
- Tapping into more occasions

### Triggers and attitudes

- Thirst satiation is the primary trigger
  - Graph 10: Triggers for consumption of juice, May 2019
- Targeting city tiers and regions
  - Graph 11: Triggers for consumption of juices by city tier and region
- Targeting areas of low consumption
- Play up high-energy claims for younger consumers
  - Graph 12: Consumption of juice to energise before/after exercise, May 2019
- Apart from price, brand value remains a top priority while purchasing
  - Graph 13: Features that influence purchase of packaged juices, May 2019
- Brands can build credibility using the ingredient story
- TURF analysis reveals the mix of attributes that will attract the largest number of unique respondents
- TURF methodology
- Packaged juices also compete with whole fruits and vegetables
  - Graph 14: Select attitudes towards juices, May 2019
- Appeal to metros and Tier 1 with seasonal variants
  - Graph 15: Agreement with 'Juices from seasonal fruits and vegetables are healthier than regular packaged juices', by city tier, May 2019
- Incorporate more herbs and spices
- Address high-sugar concerns for Millennials
  - Graph 16: Agreement with 'Regular packaged fruit juices contain too much sugar', by age group, May 2019
- Top functional claims
  - Graph 17: Select functional claims as a share of juice drink launches, Aug 2016-Jul 2019
- Emerging functionalities and associated ingredients to take inspiration

### MARKET APPLICATIONS

- What you need to know

#### Opportunities

- Play up the convenience and hygiene benefits of packaged juices
- Introduce added vitamin and mineral claims
  - Graph 18: Share of juice launches carrying vitamin/mineral-fortified claims, Aug 2016-Jul 2019
- Use added energy claims for younger consumers
  - Graph 19: Share of juice launches carrying energy claims, Aug 2016-Jul 2019
- Sugar-reduction strategies
- Top growing flavours
  - Graph 20: Top 10 growing flavours in juice drinks, Aug 2016-Jul 2019
- Infusion of Indian herbs

#### Who's innovating

- Playing with texture could connote freshness
- Cold-extracted juices
- Tap into local ethnic flavours
- Coconut juices can carry energy claims
- Use texture to help improve health perceptions of packaged juice

#### Global innovations

- Juice brands formulate with superfood ingredients to deliver functional health benefits
- Brands emphasise functionality to fit with different need states
- Brands formulate with collagen in juice and beverage concentrates
- Zico brings the health benefits of coconuts to consumers

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