

SOAP AND BATH PRODUCTS – INDIAN CONSUMER – 2019

Highlight superior benefits of shower products in a market dominated by bar soaps. Communicate suitability of shower products for bucket water bathing as well.



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Report Content

- What you need to know – Summary

EXECUTIVE SUMMARY

- Offer value-added benefits such as aromatherapy and sun protection in soap and bath products
- Global retail market overview: soap, bath & shower, 2019
- Highlight free-from claims in shower products to tackle the threat from bar soaps
- Premiumise bar soaps with aromatherapy fragrances
- Target singles with shower products that offer long-lasting fragrance
- Understand the reasons and barriers to shower product use to drive purchase
- What it means

KEY TRENDS

- What you need to know

Key drivers

- Rise in disposable income coupled with awareness around hygiene
- Unilever's awareness campaign around personal hygiene and safe drinking water
- Affordable price point and innovative powder-to-liquid hand wash format

Global trends and how they are playing out in India

- Natural NPD is most prevalent in APAC – brands can add value
- Brands look to familiar kitchen ingredients for inspiration
- Botanical/herbal claim tops NPD launches in India and APAC
 - Graph 1: Top 10 claims in soap and bath NPD, 2014-18
 - Graph 2: Top 10 claims in soap and bath NPD, 2014-18
- Go beyond natural claims to embrace sustainability
- Spotlight on palm oil – an ingredient plagued with controversy
- Plastic pollution has become a pressing environmental concern
- Water scarcity will be a challenge going forward
- Promote water-saving concepts and embody Mintel BPC's 2025 Trend Water – The New Luxury
- Relaxing fragrances to offer aromatherapy benefits

CONSUMER INSIGHTS

- What you need to know

Bathing habits and products

- The majority of Indians bathe with bucket water, but...
- West India is lowest on shower use
 - Graph 3: Mode of bathing, by region, February 2019
- Besides water, household income and SEC are indicators of shower use
 - Graph 4: Mode of bathing, by monthly household income, February 2019
- Safeguard shower gels from onslaught of premium bar soaps
 - Graph 5: Soap and bath products usage, by mode of bathing, February 2019
- Understand the reasons and barriers to using shower products to drive purchase
- Shower and shower product usage
- Shower and shower product usage map
- Persuade North Indian consumers to upgrade to shower gels by offering benefits sought in a bar soap
- Communicate shower gel's suitability with bucket water bathing as well
 - Graph 6: Bath products used, by region, February 2019
- Take inspiration from liquid hand wash to carve a space for shower gels
 - Graph 7: Soap and bath products used in the last six months, 2019
- Target liquid hand wash buyers with shower gels
 - Graph 8: Hand wash products usage, by mode of bathing, February 2019
- Fine-tune shower products to cater to specific cohorts
 - Graph 9: Usage of liquid soap (shower gel), by life stage and occupation, February 2019

Bar soap vs shower gels

- Shower gels will have to appeal to bucket water users as well
 - Graph 10: Preference between bar soaps and shower gels, by mode of bathing, February 2019
- Dial-up the value proposition for shower gels
 - Graph 11: Select product preference reasons, by bathing mode
 - Graph 12: [no title]
- Own the higher-order benefits for shower products over bar soaps
 - Graph 13: % point difference between NPD claims in bar soap over shower products, 2014-18
- Elevate bar soaps with long-lasting aromatherapy fragrances
 - Graph 14: Agreement with top five statements for bathing products, February 2019

MARKET APPLICATION

- Opportunity: Key areas of focus

Opportunities

- Offer value addition by combining sun protection benefits with brightening/illuminating claims
 - Graph 15: Sun protection benefits sought in soap/shower/face wash products, by region, February 2019

Soap and Bath Products – Indian Consumer – 2019

- Target men with multi-functional shower gels catered to their needs
- Explore synergies with other categories
 - Graph 16: Incidence of pet and hygiene wash, by fixed/hand shower usage, February 2019

Who's innovating

- A zero-waste skincare initiative that cares for you and the environment
- Multi-benefits, handmade and ingredients are some of the ways to go premium in bar soaps
- Soap bar brand extends into body wash that's superior and affordable
- Body wash adopts aromatherapy claims while bar soap sticks with botanical/herbal
- Take inspiration from India's native natural ingredients

Global innovators

- Prep U targets active 8-15 year old boys
- Natural innovations are active in the Latin American bar soap segment
- Seed Phytonutrients uses "farm fresh" message and "paper bottle" with seeds to attract attention
- South African innovations use indigenous African ingredients to add value
- Innisfree taps into upcycling trend with Anthracite coffee collaboration
- Pollution-protecting soap, bath, shower NPD is niche
- Whitening NPD – use natural ingredients, novelty and specialised claims

APPENDIX

- Methodology

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