

# THE 'NATURAL CONSUMER' – INDIAN CONSUMER – 2018

Identify natural consumers, what share of the population they represent and understand what 'natural' means to create the products they want.



A Mintel Analyst, Global Analyst



# Report Content

## EXECUTIVE SUMMARY

- What you need to know – Summary
- Give consumers what they want: natural products to improve their health and help them feel good about the choices they make
- Keep it simple when communicating natural
- Don't expect the general market consumer to pay extra for natural
- Address the imbalance in consumers' interest in natural products and launch activity across categories
- What next for brands?
- What it means

## KEY TRENDS

- What you need to know

### Key drivers

- Private and public campaigns, accessibility drives interest in naturals
- Renewed interest in Ayurveda boosts natural products
- Promote the tie between 'natural' and 'healthy'

### Global trends and how they're playing out in India

- Be straightforward and transparent with 'natural', but get prepared for future scrutiny
- Take the high road on consumers' behalf
- Potential to introduce ethical claims to complement a 'natural' stance
  - Graph 1: Ethical and environmental claim category, Jul 2013–Jun 2014 to Jul 2017–Jun 2018
- Ethical and environmental claims complement natural products in India

## CONSUMER INSIGHTS

- What you need to know

### What natural means

- Communicate 'natural' with meaningful descriptors
  - Graph 2: What 'natural' on a product label means, by all and natural consumers, April 2018
- 'Natural' is seen as simple and straightforward, but non-specific
- Add details to 'natural' when targeting upmarket urbanites
- Focus on purity, simplicity of product formulations

# The 'Natural Consumer' – Indian Consumer – 2018

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- Graph 3: What 'natural' on a product label means – Select items, April 2018
- Opportunity to premiumise, brands must also address affordability
- Make natural ingredients a key focal point on packaged food
  - Graph 4: Importance of using natural products, by all and natural consumers, April 2018
- All-natural household product launches increasing
- Space for organics and ethical/premium positioning in food
  - Graph 5: Top 10 claims among 'natural' food launches, 2013-17
- Add element of 'natural' to products stocked on store shelves in the East and West regions
  - Graph 6: Importance of natural products use, by region, April 2018
- Strengthen 'natural' positioning within regions using attributes that resonate
  - Graph 7: What 'natural' on a product label means – Top attributes, by region, April 2018

## Who is the 'natural' consumer?

- Natural consumers live the life and buy the products
- Meet the 'natural consumer'
- Target upmarket 'natural consumers' with premium-priced products
  - Graph 8: Natural consumers, by key demographics, April 2018
- Elevate trust and value perception through natural positioning

## Motivations to live a natural lifestyle

- Highlight personal benefits gained through living and buying natural
- Link natural to personal health improvement, prevention of future health problems
- Promote safety along with natural in the East and West
  - Graph 9: Motivation to live a natural lifestyle – Avoiding harmful ingredients, April 2018
- Highlight natural ingredients in BPC, specially in the East
- Use environmental messaging as an ancillary 'natural' benefit
  - Graph 10: Attitudes and motivations to live a natural lifestyle – Environment, by all and natural consumers, April 2018
- West Indians are more environmentally aware; the South is least concerned
- Keep an eye on consumers' environmental awareness and concerns

## MARKET APPLICATION

- Opportunities: key areas of focus

### Opportunities

- Introduce household care products with natural ingredients, positioning
  - Graph 11: Natural claims category, by super-category, July 2013 to June 2018
- Opportunity to align claims with how consumers define 'natural'
  - Graph 12: Consumer associations with 'natural', April 2018 vs same launch claims in F&D and BPC, July 2017 to June 2018
- India's organic market forecast to triple by 2020, driven by staples

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- Simplify organic; too many certifications and competing logos can confuse consumers
  - Graph 13: Organic certifications shown on pack, vegetables, Dec 2012–Nov 2017
- India launches a new logo for easy identification of organic foods
- Address price and awareness issues for organic foods
- Use common terms in place of scientific names to ensure comfort with familiar ingredients
- Link back to nature
- Use food-grade ingredients in beauty and personal care products
- Food-grade ingredients in beauty and personal care

## Who's innovating?

- SproutLife reassures with 'ingredients you can pronounce' in food and drink
- Dr. Vaidya's is making Ayurveda youth-oriented and relevant
- Orillet Foods marries ethics with health and natural
- Biotique banks on growing demand for natural beauty and personal care
  - Graph 14: Botanique launches, Jan 2013–Dec 2013 to Jan 2018–Jul 2018
- Selling youth to the young
- Previously Biotique Botanicals, the brand has relaunched/released a range of products under its Biotique Advanced Ayurveda banner

## Global innovators

- Putting a spotlight on the standout brands and products from the Natural & Organic Products Europe, 2018
- Key trends in natural F&D product innovations centered on:
  - Plant-based meat alternatives gaining traction, egg replacements targeted toward vegans
  - Brands innovate with new protein sources, explore superfoods and go raw
  - BPC innovations take inspiration from food:
    - Magnesium-enhanced body care products and mineral salts featured in the soap, bath & shower category
    - Superfoods, superfruits and probiotic ingredients add an array of beauty benefits
  - Vegan and sustainability were some of the show's main trends
  - US retailers commit to eliminating harmful chemicals by 2022
  - What's next: 'Clean' beauty at retail

## APPENDIX

- Consumer survey methodology
- Abbreviations and terms

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- ✔ Understand the Indian market and see how it fits into wider trends on a local and global level.
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03

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