

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

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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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- ✔ 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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UK	+44 (0)20 7778 7155
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Australia	+61 (0)2 8284 8100
China	+86 (21) 6386 6609
India	+91 22 4090 7217
Japan	+81 (3) 6228 6595
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