VITAMINS, MINERALS & SUPPLEMENTS – INDIAN CONSUMER – 2021

Post-pandemic interest in preventive health and holistic wellbeing augurs well for the VMS segment. Natural and clean label solutions have strong potential.

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Report Content

EXECUTIVE SUMMARY

- What you need to know
- Mintel's perspective

Market context

- The impact of COVID-19 on vitamins, minerals and supplements
- Stress in the city leading to lifestyle health issues

What consumers want and why

- Consumers want: natural and organic ingredients
  - Graph 1: encouraging factor to try organic/natural VMS, by socio economic class, 2021
- Consumers want: holistic wellbeing
- Consumers want: familiar and convenient formats

Opportunities

- Adopt clean labelling with an emphasis on all-natural ingredients
- Address lifestyle-related diseases with holistic wellbeing at the forefront
- Adopt convenient multipurpose formats easily incorporated into daily life

Competitive landscape

- Lines are blurring between VMS and functional food and drink
- Home remedies limit VMS usage

THE IMPACT OF COVID-19 ON Vitamins, minerals and supplements

- The outlook for the Indian vitamin, mineral and supplement industry
- The marketing mix
- Good times ahead for VMS

KEY TRENDS

- What you need to know
- Mintel Trend Total Wellbeing
- Technological advancement paves the way for hyper-personalisation in healthcare
- Nesfinity – a health app to meet individualised life needs management

Key drivers

- Demand for accessible healthcare solutions

- Need for convenience driving format innovations
  - Graph 2: VMS launches by country, 2018-21
- Functional food and drink address demand for health and convenience with format innovations
- FSSAI makes VMS more nutrient dense

CONSUMER INSIGHTS

- What you need to know

Barriers and gateways to the VMS category

- Consumers' rising interest in health protection and prevention favours VMS growth
  - Graph 3: select COVID-19-related changes in food and drink behaviour, 2020
- VMS enjoys a positive health image among Indians
- Medicinal halo around the category limits usage
  - Graph 4: agreement with select statements, by age group, 2021
- Seven in 10 Indians don't recognise the need for micronutrient supplementation
  - Graph 5: agreement with 'My diet provides me with all the required vitamins and minerals', by age, 2021
- Transform the need into a want by positioning VMS as part of self-care lifestyles
  - Graph 6: agreement with 'A healthy person doesn't require vitamins, minerals and supplements', 2021
- Make vitamin and mineral supplements affordable
- Allay consumer concerns about the side effects of using VMS
  - Graph 7: agreement with select attitudes to VMS, by gender, 2021
- Fortified and functional food and drink pose a challenge to VMS
  - Graph 8: consumers who strongly agree with 'Food and drink products enriched with vitamins and minerals would appeal to me', by city tier, 2021

What consumers want and why

- Tablet/capsule formats dominate VMS launches
  - Graph 9: VMS launches, by format types, 2016-21
- Functional/fortified food and drink products attract consumer attention
  - Graph 10: consumer interest in various types of VMS formats, 2021
- Men and women have their unique format preferences
  - Graph 11: preference of VMS formats, by gender and age, 2021
- Offer customisable formats to Millennials
  - Graph 12: preference of VMS formats, by gender and age group, 2021
- Organic and natural claims drive trial in VMS
  - Graph 13: VMS launches, by top five claims, 2020-21
  - Graph 14: top five factors to encourage VMS trial, 2021
- Address the medicinal halo with natural and organic ingredients

- Pair natural claims with improved taste/palatability to maximise appeal
- Use doctor influencers to encourage self-prescription among affluent consumers
  - Graph 15: select factors encouraging VMS trial – prescribed by doctors, by socioeconomic class, 2021
- Older consumers want products specifically for their needs
  - Graph 16: consumers selecting encouraging factor 'ability to personalise/customise' for trying VMS, select by age group, 2021

Means and methods to tackle health concerns

- The majority of VMS usage is driven by prescription
  - Graph 17: select health issues by home remedy users, 2021
  - Graph 18: select health issues by VMS users*, 2021
- Position VMS products to fit into home remedy routines and drive self-prescription
- Offer VMS solutions that make home remedies convenient
- Help consumers self-diagnose nutritional deficiencies and guide self-prescription
  - Graph 19: how consumers have addressed vitamin/mineral deficiency in the last six months, by age group, 2021
- Home-testing kits let consumers take a proactive approach
- Immune support continues to gain traction among parents and older consumers
  - Graph 20: consumers who have addressed immune support with VMS in the last six months, by parental status and age, 2021
- Strong competition warrants shelf differentiation with immune support claims
  - Graph 21: VMS launches with immune support claims, 2017-21
- Three consumer health concerns emerge in the next normal
- Cocooning lifestyle brings eye health to the fore
  - Graph 22: how consumers have addressed eye health issues with VMS in the last six months, 2021
- Make eye health a priority as more screen exposure becomes the next normal
- Tailor weight loss offerings to the needs of different demographics
  - Graph 23: consumers facing weight management issues, by gender and age, 2021
- Motivate consumers in their weight loss journey
- Promote stress and sleep benefits as part of a holistic approach to health and mental wellbeing
  - Graph 24: share of VMS launches with stress and sleep claims, 2017-21
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  - Graph 25: how consumers have addressed bone health in the last six months with VMS, by gender and age, 2021
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  - Graph 26: consumers who have faced digestive health issues in the last six months, by gender and employment, 2021

MARKET APPLICATIONS

- Opportunity: key areas of focus

Tackle the health issues triggered by COVID-19

- Immune health drives VMS demand; weight gain, eye health and stress are also in the spotlight
  - Graph 27: VMS launches, select functional claims, 2017-21
- Create differentiation by offering added value to immune health-related supplements
- Encourage lifestyle changes to address 'COVIDbesity ' without being medicinal in nature
- Eyeing the big 'next normal' health trend
- Give mental wellness its due importance

Reassure on the safety and efficacy of VMS with clean and natural positioning

- Innovate with natural ingredients and clean labelling to counter the medicinal halo surrounding VMS
  - Graph 28: percentage of all launches, select ingredient claims in VMS, 2018-21
- Appeal with pure, clean and green positioning
- Let the ingredients do the talking
- Augment clean and green positioning with eco-friendly claims
- Take a stand: appeal to consumers' eco-consciousness

Encourage self-care as a part of holistic wellbeing

- Link gut health with immunity and holistic wellbeing
  - Graph 29: percentage of all launches with digestive health claims in VMS, 2016-21
- Educate consumers on the benefits of prebiotics, probiotics and postbiotics
- Encourage self-care rituals with approachable VMS positioning
- Cosmix takes the holistic health approach with multiple applications
- The Wellness Collective positions itself as a modern wellness brand

Drive consumption with convenience-led format innovation

- Beyond Water offers a convenient and customisable format for VMS consumption
- Grow category consumption with convenient, customisable or palatable formats
- Improve palatability with mainstream food and drink formats

Who's innovating?

- Make VMS fun for children with format and packaging innovation
- Connect health tech with VMS to offer hyper-personalisation
- Burgeoning health tech in India will drive future innovations

APPENDIX

- Report definition
- Consumer survey methodology
- Abbreviations and terms

About Mintel India Consumer

Access our reports now and we'll tell you how major trends are affecting India. We also hone in on the regional differences from socio-economic groups to demographics such as age, gender and household composition. We research consumers in Metro and Tier 1 to 3 cities across the 4 main regions and in 6 local languages.

In each report, we're analysing the trends and the innovations, the behaviours and the influencers of consumers across India. Our local expert analysts then examining the primary research and consumer data and translating it into what it means for you.

- 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.

How Mintel Indian Consumer will help your business grow:

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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