

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

Vitamins, Minerals & Supplements – Indian Consumer – 2021

- 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
- Encourage consumers to build and maintain strong bones during all stages of life
 - Graph 25: how consumers have addressed bone health in the last six months with VMS, by gender and age, 2021
- Home remedies prevail in the digestive health segment
 - 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

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- ✔ 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

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02

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03

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