

VITAMINS & SUPPLEMENTS – INDIAN CONSUMER – 2019

Addressing nutrient deficiency by introducing vitamins and supplements in new formats and making them consumable on a daily basis will drive growth.



Rimpie Tulsiani, Sr. Beauty
& Personal Care Analyst,
India



Report Content

- What you need to know

EXECUTIVE SUMMARY

- Address the nutrition deficiency in India with VMS in new forms
- Global retail market overview: VMS, 2019
- Address the deficiency need with innovative VMS formats
- Increase awareness of VMS so that it moves away from its medicinal image
- Create awareness of dietary supplements intake with food
- Build a safe image by creating supplements using traditional knowledge
- Extend regular formats by introducing supplements in food and drinks

KEY TRENDS

Key Drivers

- Preventive health measures are driving the VMS market in India
- Malnutrition status in India and micro-nutrient deficiency
- Increasing health-consciousness
- Moving from traditional formats to e-commerce
- Urban India driving the market
- Startups mushrooming in the Nutraceuticals space
- Interest in sports growing in India

CONSUMER INSIGHTS

- Know the 'VMS consumer'
- Profile data
- VMS market in India is in a nascent stage and has potential for growth
- India is still an evolving market for VMS
- Nandini Milk fortified with vitamins A & D
- Promote the preventive abilities of VMS through educational campaigns
 - Graph 1: Reasons for not using VMS, Nov 2019
- Government initiatives to address nutrient deficiencies
- Even private companies are joining the league in creating awareness
- Vitamins for bones/joints tops the list

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– Graph 2: Usage of vitamins, by reason, Nov 2019

- Take cue from bone/joint oil which stresses the power of Ayurveda
- Draw inspiration from these products, which are introduced in the bone strengthening space
- Tablet continues to be the most preferred format in VMS
- Tablet continues to be the most preferred format in VMS

– Graph 3: Formats of VMS, Nov 2019

- Cues on how different forms of VMS are working in the Indian market
- Ayurvedic supplements are considered much safer than regular VMS

– Graph 4: Ayurvedic supplements in comparison to regular VMS

- Brands like Dabur who discourage people from using allopathy due to its side-effects
- Popular Ayurvedic herbs that are used in most herbal supplements in India
- Herbal supplements that have been in the Indian market for years
- Ride the 'natural' wave to help consumers adapt to supplements
- Non-VMS users remain unconvinced of supplements
- Insights on key users age-wise
- Type of vitamins to be targeted city tier-wise
- Women look to strengthen bones and men look for energy
- Take cues from this advertisement, which shows the usage of VMS for energy
- Take inspiration from this advertisement showing the usage of protein for muscle building

MARKET APPLICATION

Opportunities

- Opportunities – what you need to know
- Target women with vitamins for stress
- Focus on homemakers to increase adoption of vitamins
- Aim East for multivitamins and North for single vitamins
- Launch supplements in innovative formats
- Provide a subscription-based model for VMS consumers
- Fuse beauty and supplements to target North Indian consumers
- Take cues from brand Safi, which fuses beauty and supplements
- Tailor weight management solutions for women aged 35-44 years
- Use social media to market new as well as established brands

WHO'S INNOVATING

Local innovations

- Dr Reddy's Celevida

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- Unifibe Noni Gold Fruit Juice Concentrate
- Unived Oveghe D3 Kids Orange Flavour D3 Supplement
- Organico Slim Garcinia Ultra Slim
- Nutrilite Cal Mag Plus

GLOBAL INNOVATIONS

- Probiotic NPD is most active in children's VMS segment
- Spotlight on energising and bone health innovations
- Adaptogen innovations help with stress relief and cognitive care

GLOBAL TRENDS PLAYING OUT IN INDIA

- Help people transition to natural ingredients
- Tap into a 'clean' movement
- Detail the provenance of natural ingredients
- Multi-functional VMS gaining momentum
- Offer protection from pollution and blue light
- Pollution and blue light protection innovations are niche
- Product with unique packaging as well as different formats making inroads
- Take cues from these unusual formats/packs that stand out

APPENDIX

- Consumer survey methodology

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03

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