

WEIGHT MANAGEMENT – INDIAN CONSUMER – 2018

Demand for weight management solutions will rise as more than one third of urban Indian consumers are concerned with being overweight and obesity rates increase.



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Report Content

EXECUTIVE SUMMARY

- What you need to know - Summary
- Opportunity to benefit from growing demand for weight management solutions
- Urban Indian consumers want to change their eating habits for the better
 - Graph 1: Share of product launches with vegetable and fruit ingredients (%), food and drink (excluding alcohol), 2012-17
- Introduce BFY options that align with Indian consumers' evolving tastes and lifestyles
- Leverage advantages and address disadvantages of urban living
- Make it easier for Indian consumers to choose less of the 'bad' and more of the 'good'
- Provide personalized support to help motivate
- What it means

KEY TRENDS

- What you need to know

Key drivers

- Move to high pressure urban living drives opportunity for healthy convenience foods
 - Graph 2: Urbanization rate, 1995-2025
- Develop products for India's growing diabetic population, and those who are concerned with prevention
- Low intake of fresh produce, increasing consumption of processed foods drive weight gain
- Food industry needs to be proactive: consequences include 'fat tax,' mandatory warning labels, limits to portion sizes
- Could a 'fat tax' shift Indian consumer behavior? It depends.
- Tailor weight management solutions toward urban Indian women aged 25+
 - Graph 3: Obesity rate among ages 15-49, by gender, 1975 and 2014
- Urban Indian population more prone to obesity vs rural counterparts
- Most states experience a sharp rise in obesity

Global trends and how they are playing out in India

- Indian consumers seek self-improvement
- Around the world, restaurants emphasize health 'plus'
- QSRs in India offer BFY alternatives to balance indulgence
- Body positive movement taking shape
- Celebrating plus size and all the best points

CONSUMER INSIGHTS

- What you need to know

Who is watching their weight

- Weight management products positioned as part of an overall healthy lifestyle will resonate across a variety of demographics
 - Graph 4: Concerns and perceptions of being overweight, by key demographics, February 2018
- Combine 'health' with weight management to boost appeal
- Watch the west to keep ahead of weight management trends and innovations
- Educate and focus on the basics of diet and exercise
 - Graph 5: Approach to living a healthy lifestyle – physical, by weight worriers and weight managers, February 2018
- Extend positioning into emotional wellbeing with products for stress reduction, relaxation, sleeplessness, fatigue
 - Graph 6: Health concerns and approach to living a healthy lifestyle – emotional wellbeing, by weight worriers and weight managers, February 2018
- Help Indian consumers feel they are in control by offering choices
 - Graph 7: Reasons for cooking and snacking, by weight worriers and weight managers, February 2018

How consumers are trying to change their eating habits

- Focus product development in areas where Indian consumers are most trying to make a change
 - Graph 8: Making an effort to change consumption amount compared to 12 months ago, February 2018
- Offer alternatives to fried foods and promote sugar substitutes, particularly to those aged 35+
 - Graph 9: Trying to eat less compared to 12 months ago, by age, February 2018
- Listen to the consumer: reduce average added sugar and highlight the benefits
 - Graph 10: Average sugar content across food and drink launches, India and global, 2013-17
- Add value by using different strategies to communicate sugar reduction
- Fortify with added protein and fiber
 - Graph 11: Trying to eat more fiber compared to 12 months ago, by region and metro, February 2018
- Promote high protein for satiety as a means for weight management
 - Graph 12: Average protein content in food and drink launches, India and global, 2013-17
- Beyond weight management: incorporate added protein into other categories to attract Indian consumers' attention

The influence of labels and pack size

- Highlight nutrition facts and explain how the product fits recommended daily allowances
- Provide caloric information in the context of 'per serving'
 - Graph 13: Looks at calories per serving on food/drink product labels, by gender and age, February 2018
- Do the work for Indian consumers: display the nutrition information of what they will actually consume
- Meet demand for low-calorie and portion controlled healthy snacks
 - Graph 14: Important factors when choosing a snack, by household grocery shopping responsibility, February 2018

- Smaller can be better: help Indian consumers exercise portion and calorie control

MARKET APPLICATION

- Opportunities: key areas of focus

Opportunities

- Combine 'slimming' with other functional benefits of interest
 - Graph 15: Q1-Q4 2017
- Highlight hunger management and enhance texture
 - Graph 16: Top five textures in global food product launches with high satiety claim, 2017

Who's innovating

- Guilt-free healthy snacks have a receptive audience among weight-conscious consumers
- Introduce tasty, healthy snacking options
- Too Yumm! snacks offer a healthier snacking alternative
- Promote fiber for fullness
- Saffola Active Soups ad campaign focuses on satiety

Global innovators

- Help Indian consumers make informed decisions through clarity in product labels
- Make key nutrition information more prominent and easy to understand with a consistent label across brands, categories and stores
- Empower shoppers to choose and customize products to suit their weight management needs
- Provide convenient ways for urban Indian workers to fit in fitness

APPENDIX

- Consumer survey data
- Definitions and terms

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