



Euromonitor
International

Consumer Need States and Mindful Mindsets Across Fmcg

October 2022

INTRODUCTION

Scope

BACKGROUND AND CONTEXT

What are need states and why do they matter?

Drivers of need state mindset amongst consumers ...

How need states are manifesting across industries

“Traditional” claims-making expanding into more diverse need state signalling

DEFINING AND MAPPING NEED STATES

The map and the territory of need states

Need state trajectories

Framing need states as the nexus of short-term and long-term drivers

The multidimensional drivers of need states

FORMULATING FOR FUNCTIONALITY

Link between need states and ingredients

Emerging ingredient areas

How brands use formulation to deliver a need states proposition

CHALLENGES IN NEED STATE POSITIONING

Key challenges in need state positioning

Regulatory restrictions

Need state positioning is writing cheques that the product itself must be able to cash

Creating clear blue water (or differentiating from the other clear blue water)

SIZING NEED STATES

The opportunities and challenges of sizing need state economies

Potential approaches to measuring outcome-based opportunities

Redistributing cannabis consumption by need state

NEED STATES ACROSS FMCG

Need states offer promise and peril for consumer health companies

Consumer health: By popular format, need state and ingredients

Lifestyle-orientated supplements driving both near-term and long-term growth

Nature Made Wellblends leans into the interconnected nature of need states

Kao Corp's Refine line integrates need states under a healthy ageing banner

Introduction to need states in beauty and personal care

Beauty and personal care: By popular format, need state and ingredients

Impact of need states on beauty and personal care

Givaudan's MoodScentz aims to harness need states in fragrances

Mood sets out to persuade the consumer, body and soul

Need states propositions gain momentum in packaged food

Packaged food: By popular format, need state and ingredients

Impact of need states on packaged food

Lifeway launches a trio of adaptogenic cultured oat milks

Nuccy combines ashwagandha with nut butter – a first in the UK

Introduction to need states in soft drinks

Soft drinks: By popular format, need state and ingredients

Impact of need states on soft drinks

Kirin Namacha Lifeplus Immune Assist and Gogo-no-Kocha Milk Tea Plus (Japan)

Little Saints Plant Magic Mocktails (US)

Introduction to need states in cannabis

Cannabis: By popular format, need state and ingredients

Impact of need states on cannabis

Curaleaf's Plant Precision aims to simplify and build consumer confidence

Weekenders seeking to guide consumers to their choice of feeling

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/consumer-need-states-and-mindful-mindsets-across-fmcg/report.