



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

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