



**YOUR NETWORK YOUR VOICE**

# Indian Market Dynamics

**Sanjay Trivedi -Director – IHPCIA  
AOSDAC Conference – 15 November 2021**



# MEMBERS



Trivedi Groupe



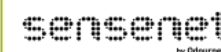
Aditya Finechem



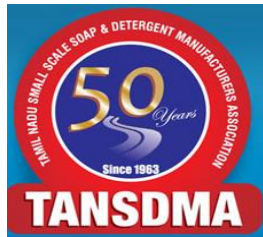
KELKAR GROUP  
Infinite Possibilities.



IndianOil



# NATIONAL AFFILIATE ASSOCIATIONS



**341 Members**



**400 Members**



**238 Members**



**200 Members**



**40 Members**



Bengal Soap & Detergent  
Manufacturers' Welfare  
Association

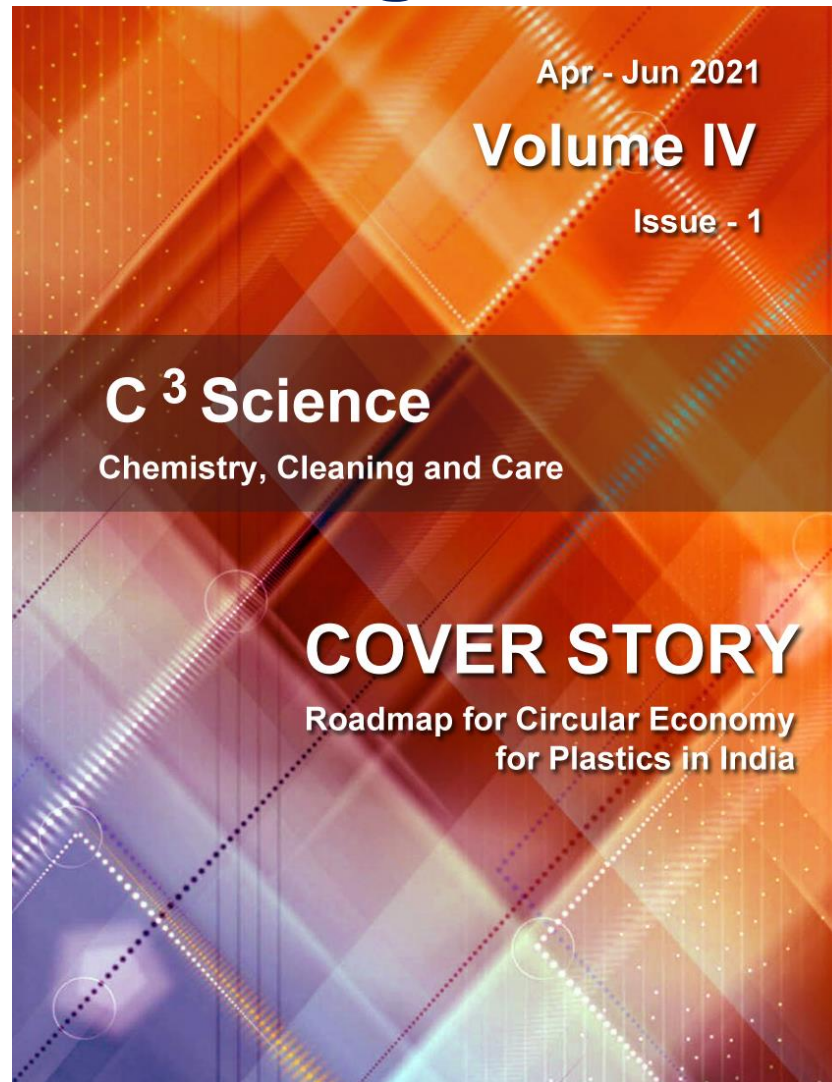
**50 Members**



**22 Members**



# C3 Magazine



\*\*\*Click on the image

# Home & Laundry care market in India

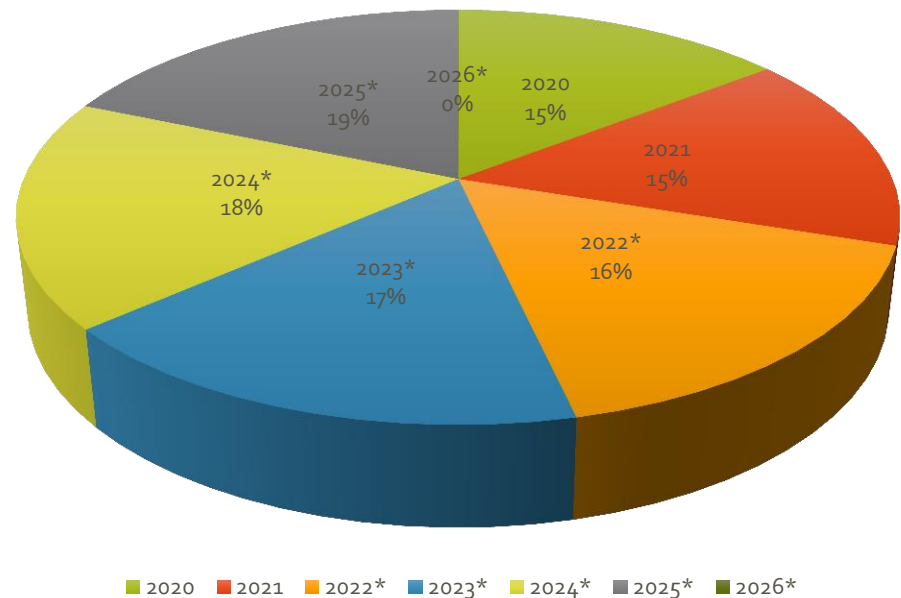
Revenue in the Home & Laundry Care market amounts to US\$7,777m in 2021. The market is expected to grow annually by 4.55% (CAGR 2021-2026).

The market's largest segment is the segment Laundry Care with a market volume of US\$4,989m in 2021.

In global comparison, most revenue is generated in the United States (US\$28,808m in 2021).

In relation to total population figures, per person revenues of US\$5.58 are generated in 2021.

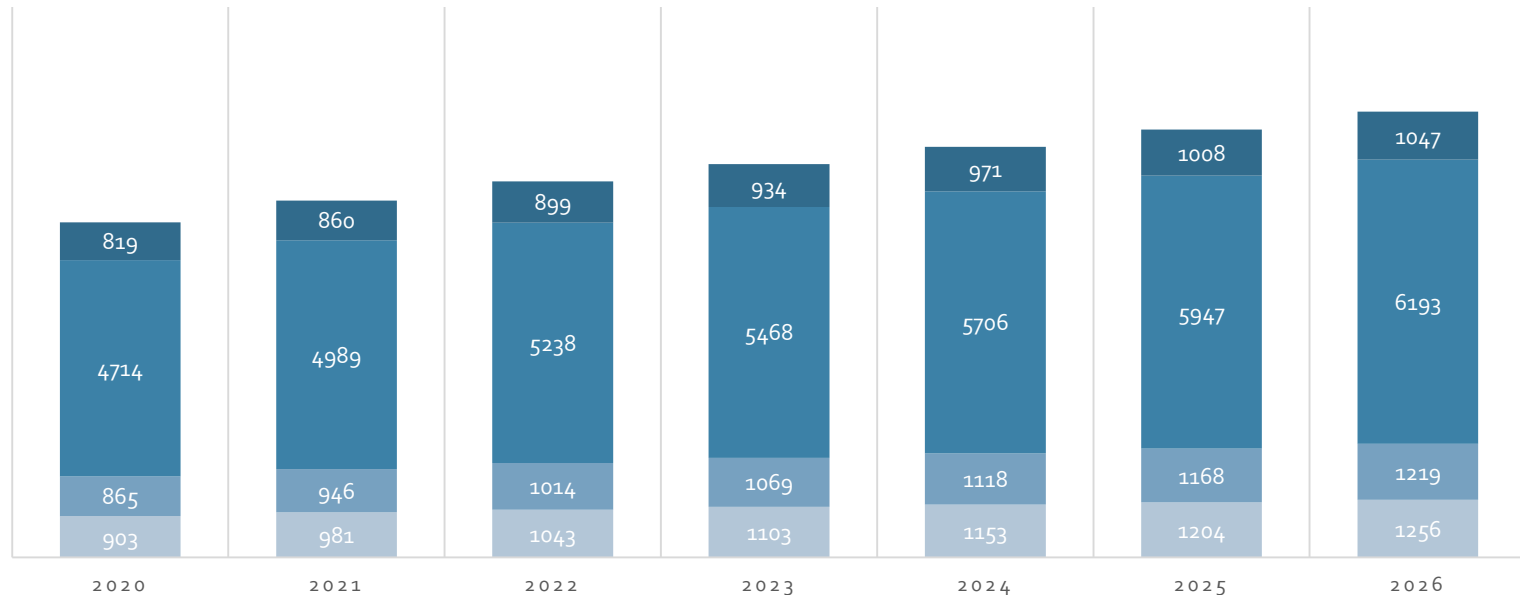
**Home Care market in India in value terms (US\$ Mn)**



# Home & Laundry care market in India

## HOME AND LAUNDRY MARKET BY SEGMENT (US\$)

■ Dishwashing detergents 
 ■ Household cleaners 
 ■ Laundry care 
 ■ Polishes, Room scents



## INDUSTRY CHALLENGES



**CHANGING CONSUMERS**



**CHANGING ENVIRONMENT**



**CHANGING REGULATIONS**



**CHANGING  
CONSUMERS**



**Changing family structures**



**Increasing Urbanization**



**Rise of the Millennials**



**Emerging Middle & Upper class**





**Environment under stress**



**Digital & Technological evolution**



## CHANGING REGULATIONS

### GOODS & SERVICE TAX

- Change expected to boost consumption, improve consumer sentiment.
- **Anti-profiteering body** and guidelines formed by Government, to check on the passing of benefits of the change in GST rates.

### DATA PRIVACY

- Landmark SC judgement – **Right to privacy is a fundamental right.**
- New law with **strict compliances inevitable**
- Entire **data driven marketing will need review** and changes

### MULTI-LAYER PACKAGING

- **Ban on non-recyclable MLP packaging** expected by March 2018
- EPR responsibility – **100% collection of post-consumer waste**

### PACKAGING LABELLING RESTRICTIONS

- Amendments to the Legal Metrology (Packaging Commodities) Rules - **New Packaging and Labelling requirements**

# Challenges Ahead and the Need for Innovations



Consumers believe “**High Foam**” indicates “**High Clean**”

Today 50-60 L of water is used to wash 8-10 kgs of Fabric

**Water Hardness – High**

**Scarcity of water – Cost of Water is High**

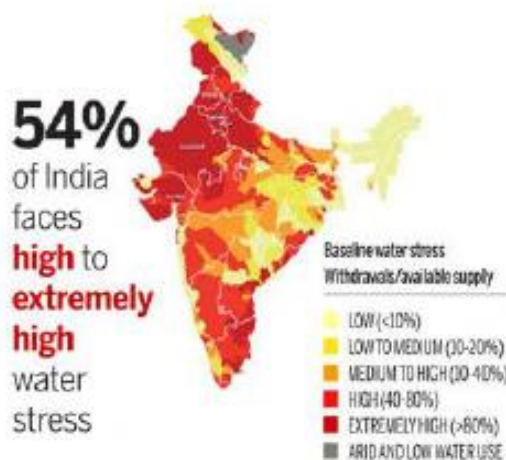
**Washing Clothes Become an Expensive Affair**

**Key Innovations :**

**Alternate Low Foam Actives**

**Good ARD, Hardness Resistant**

**Biodegradable**



# Circular Economy for Plastics in India



**Objective 1: Adopting sustainable material solutions-use of bio-based polymers, substitution of virgin polymer with recycled polymer, and dematerialization of plastic products.**

## Action

- R&D around sustainable material solutions
- Targets (voluntary and mandatory) for adoption of sustainable material solutions
- Circular designs on plastic products (including packaging)



- Green Procurement
- Incentivizing sustainable material use
- Knowledge creation



- Awareness generation
- Technology based solution
- Business development support programme



**Objective 2: increase supply of good quality secondary plastics feedstock (recycled plastics).**

## Action

- Awareness generation
- Knowledge creation



- Infrastructure for waste recycling
- Incentivize supply of quality recycled plastics



- Informal sector integration with formal sector
- Capacity building



**Objective 3: Invent, Innovate, and encourage alternative uses of difficult to recycle plastic waste.**

## Action

- Expanding reutilization
- R&D to find economically viable alternative new uses



- Infrastructure for existing and new uses
- Business development support programme



- Industry collaboration and partnership





Save **water**



Save **energy**



Save **trees**



Don't use  
too much **plastic**



# Key Elements of Sustainable Consumption & Production



Reimagining the future of cleaning

## Our 5 big "pivots"

Petro-chemical ingredients



High carbon chemistry



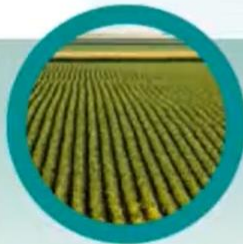
Wastage of water



Single use plastic



Distrust in chemicals



100% renewable or recycled carbon-based ingredients



Low carbon products that work in quick and cold wash



Water efficiency & biodegradability



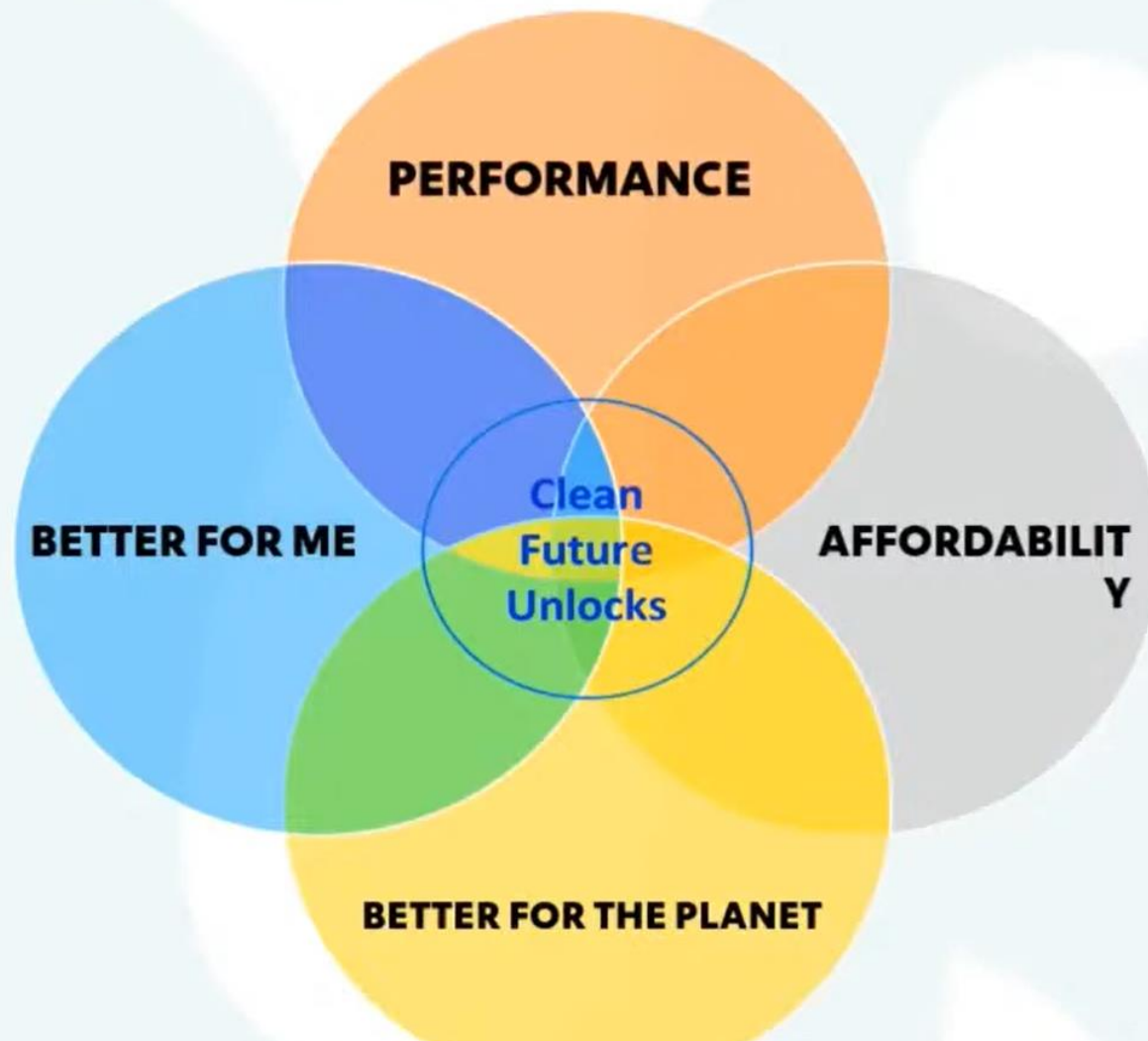
Recyclability, PCR, refill & re-use



zoom  
Products designed for consumer trust

Our vision for a Clean Future

# Clean Future technology unlocks





# The Sustainable Development Goals – India's Progress Report 2021

[SDG-3: Good Health and Well-Being](#)

[SDG-6: Clean Water and Sanitation](#)

[SDG-9: Industry, Innovation and Infrastructure](#)

[SDG-12: Responsible Consumption and Production](#)

# UPCOMING INTERNATIONAL EVENT

## 1. ISDC 2022:



International Convention and Exhibition on Soaps  
Detergents and Cosmetics  
Hotel Alila Diwa, Goa 10th July - 12th July, 2022

## 2. IHPCIA looks forward to hosting AOSDAC 2023 Goa

