India Maternity and Baby Care Industry Outlook to 2018
- Hybrid Expansion of Retail and Online Channels to Lead Future Growth
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INDIA MATERNITY PRODUCTS INTRODUCTION AND MARKET SIZE, 2008-2013

The maternity products market in India is a niche segment of the retail industry in the country. The market for maternity products paved its way in India in 2007. Prior to that, women had to be content with plus size garments such as gowns and kurtis during pregnancy stage. Being presentable and well dressed was given little importance by the women segment of the population in the country.... With excessive emphasis laid on to-be-mother’s diet, expecting women’s attire during those nine months took a backseat and fashion was not given any importance. At present, India houses nearly 22 million expecting women population which could form a potential consumer base for maternity products industry in India....

Most of the maternity products industry is concentrated in Tier 1 cities which include Delhi, Mumbai, Kolkata, Chennai and others. In the recent years, Mom & Me stores have expanded their distribution network into Tier II cities such as Mysore and Baroda further fuelling the growth of maternity industry...

Figure: India Maternity Products Market Size by Revenue in INR Million, 2008-2013
INDIA MATERNITY PRODUCTS MARKET SEGMENTATION, 2013

The facet of maternity industry in India has transformed from an inoffensive small time interest into a composite commercial industry. Increasing media exposure and awareness amongst women has aided the popularity and growth of maternity products market in the country…

Maternity apparel is one of the fastest growing segments of maternity products market in India making a contribution of nearly 9~0.9% in 2013. Maternity pillows and cushions is the second largest contributing segment with a ~% contribution to the maternity products market revenue as recorded in 2013…

Table: India Maternity Products Market Segmentation by Maternity Apparels, Pillows and Cushions, Books and CD’s and others on the Basis of Revenue in INR Million, 2013

<table>
<thead>
<tr>
<th>Maternity Product Categories</th>
<th>Revenue (INR Million), 2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maternity Apparels</td>
<td></td>
</tr>
<tr>
<td>Pillows and Cushions</td>
<td></td>
</tr>
<tr>
<td>Books and CD’s</td>
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<tr>
<td>Others</td>
<td></td>
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<tr>
<td>Total</td>
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</tbody>
</table>

INDIA MATERNITY APPARELS MARKET INTRODUCTION AND SIZE, 2008-2013

…maternity apparels are generally made up of cotton or natural fabrics which are comfortable and even advised by gynecologists. To address this need, majority of the expecting women in India prefer to wear plus size clothes over maternity apparels. Though such clothes accommodate for the women’s growing belly, it gives a shabby look as the apparel is ill fitted in both horizontal and vertical dimensions. This acts as a major growth deterrent for the maternity apparels segment of the market…
...the market over the years has showcased growth from INR ~million in 2008 to INR ~ million in 2013, thus marking a CAGR of 20.1% during the period...

**Figure: India Maternity Apparels Market Size by Revenue in INR Million, 2008-2013**

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**INDIA MATERNITY APPARELS MARKET SEGMENTATION, 2012**

**BY ETHNIC AND WESTERN WEAR, 2012**

Similar to the fashion conscious, celebrity driven apparel industry, the demand for maternity apparels among Indian women are also driven by such factors.... Maternity clothes not only involve different style of tailoring but new innovations to keep up with spurring demand and trends in the industry...

With India being a traditional and conservative society, the demand for ethnic maternity wear is quite high. Women are still not very comfortable with western maternity apparels…

Ethnic maternity wear comprises of ~% of the total maternity wear market in India whereas western wear takes the remaining share of ~% of the total maternity apparels market size as recorded in 2012.

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Table: India Maternity Apparels Market Segmentation by Ethnic Wear and Western Wear on the Basis of Revenue in INR Million, 2012

<table>
<thead>
<tr>
<th>Types of Maternity Wear</th>
<th>Total Revenue in INR million, 2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ethnic Wear</td>
<td></td>
</tr>
<tr>
<td>Western Wear</td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td></td>
</tr>
</tbody>
</table>

INDIA MATERNITY WESTERN WEAR MARKET SEGMENTATION, 2012

…the western maternity wear majorly comprises of jeans, trousers, leggings, tops, t-shirts, skirts, dresses, nightwear and others. Some of these styles have camouflaged feeding facility making them suitable for use, post delivery as well.

The largest segment of western wear is occupied by Tops comprising of nearly ~% of western maternity wear market revenue in 2012. This was followed by Bottoms accounting for 19% share in the market. Dresses and Tunics, Nightwear and Maternity Accessories make a significant contribution of ~%, ~% and ~% respectively in 2012…

Figure: India Western Wear Maternity Apparels Market Segmentation on the Basis of Contribution in Percentage (%), 2012
The unorganized sector was the dominant segment with a market share of approximately 79.8% in 2009 while the remaining ~% was taken by the organized sector...however, with the introduction of giant retail store Mom & Me, expansion of Mothercare’s operations in India and entry of new branded players, the organizational structure underwent a change and market share of organized sector increased to ~% in 2012…

Figure : India Maternity Products Market Segmentation by Unorganized and Organized Sector on the Basis of Contribution in Percentage (%), 2009 & 2012

Table: India Maternity Products Market Segmentation by Unorganized and Organized Sector on the Basis of Revenue in INR Million, 2009 & 2012

<table>
<thead>
<tr>
<th>Organizational Structure</th>
<th>2009</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organized Sector</td>
<td></td>
<td></td>
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<tr>
<td>Unorganized Sector</td>
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<td>Total</td>
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</table>
COMPETITIVE LANDSCAPE OF MAJOR MATERNITY BRANDS IN INDIA

The maternity products market in India is largely concentrated amongst the giant retail stores, Mom & Me and Mothercare with the former having a greater market share as compared to the latter. The market share of Mom & Me on the basis of retail store presence in maternity products market in India in 2012 was ~% while Mothercare captured approximately ~% share in the market in terms of retail space...

Table: Competitive Landscape of Major Maternity Brands by Number of Retail Stores Present in India

<table>
<thead>
<tr>
<th>Name of the Company</th>
<th>Number of Retail Stores</th>
<th>Operating own Online Websites</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mom &amp; Me</td>
<td>EBO-</td>
<td></td>
</tr>
<tr>
<td>Destination Maternity</td>
<td>EBO-</td>
<td></td>
</tr>
<tr>
<td>Mothercare</td>
<td>EBO-</td>
<td>MBO -</td>
</tr>
<tr>
<td>Nine Maternity Wear</td>
<td>MBO -</td>
<td></td>
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<tr>
<td>Zeme Organics</td>
<td>EBO-</td>
<td>MBO -</td>
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<tr>
<td>Cherish Maternity</td>
<td>MBO -</td>
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<tr>
<td>Morph Maternity</td>
<td>MBO -</td>
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<tr>
<td>Uzazi</td>
<td>MBO -</td>
<td></td>
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<tr>
<td>Mama &amp; Bebe</td>
<td>MBO -</td>
<td></td>
</tr>
<tr>
<td>Mama ‘N;’ Munchkins</td>
<td>MBO -</td>
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</table>
In India, maternity products lack mass acceptance because of its very low penetration rate of nearly 1.5%....the maternity products market is expected to remain niche in the near future but will record a relatively higher CAGR of 17.3% from 2013-2018 as compared to 16.0% in 2008-2013. The market is expected to grow in terms of volume with rising demand and growing preferences of the Indian women especially for western maternity clothing...

The market size is forecasted to reach ~ million by 2017 up from INR ~ million in 2014.

**Figure: India Maternity Products Industry Future Projections on the Basis of Revenue in INR Million, 2014-2018**
The demand and sales of baby care products in India have escalated even during the weak economic conditions across the globe. The market for baby care products in India has increased from INR ~ million in 2008 to INR ~ million in 2013, registering a CAGR of 11.8% during the period. Rising income levels, fewer children per household, increasing awareness level amongst parents to provide superlative care for their children, increase in working women population and increased expenditure by parents on baby care products are some of the major growth propellers of this industry…

**Figure: India Baby Care Products Industry Market Size on Basis of Revenue in Percentage (%), 2008-2013**

![Graph showing the growth of India Baby Care Products Industry Market Size on Basis of Revenue in Percentage (%), 2008-2013](image)

**INDIA BABY CARE PRODUCTS MARKET SEGMENTATION, 2008-2013**

Baby Food and Skin Care are the largest segment contributors to the baby care products industry having a market share of ~% and ~% respectively in 2013. Baby food market includes dried baby food, infant milk formula and specilaity food. Baby skin care product, including baby creams and moisturizer,powder and baby massage oil, is the basic requirement for babies and part of
their daily skin care routine. The major demand driver of this segment is their regular usage which increases the consumption...

Table: India Baby Care Products Segmentation by Product Categories on the Basis of Revenue in INR Million, 2008-2013

<table>
<thead>
<tr>
<th>Particulars</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013P</th>
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</thead>
<tbody>
<tr>
<td>Baby Food</td>
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<tr>
<td>Skin Care</td>
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<tr>
<td>Toiletries</td>
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<tr>
<td>Bath Care</td>
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<tr>
<td>Convenience Products</td>
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<tr>
<td>Hair Care</td>
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<tr>
<td><strong>Total</strong></td>
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</table>

INDIA BABY FOOD MARKET SIZE, 2008-2013

...the dried baby food is the largest segment of baby food market in India which contributed ~% to the total baby food market revenue in 2013. Infant milk formula was the second largest segment with a contribution of ~% to the baby food market. The working women population has increased from ~% in 2011 to ~% in 2012.

The baby food industry in India grew at a CAGR of 10.7% from 2008-2013. This industry was not impacted from the global economic downturn in 2008 and Euro zone crises of 2010...
Figure: India Baby Food Market Size on the Basis of Revenue in INR Million, 2008-2013

Table 1: Major Brands in India Baby Food Market with Prices in INR, 2012

<table>
<thead>
<tr>
<th>Brands</th>
<th>Quantity (in grams)</th>
<th>Price in INR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Farex</td>
<td></td>
<td></td>
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<tr>
<td>Dexolac</td>
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<tr>
<td>Nan</td>
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<tr>
<td>Lactogen</td>
<td></td>
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<tr>
<td>Lactodex</td>
<td></td>
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<tr>
<td>Zerolac</td>
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<tr>
<td>Amul Spray Infant Milk</td>
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<td>Nestum</td>
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<tr>
<td>Cerelac</td>
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</table>

Source: Department of Consumer Affairs, India
Coconut oil, olive oil, almond oil, mustard oil and pure ghee are some of the traditional oils used for baby massage. Chamomile and Aloe Vera have been used as key ingredients in massage oil since ancient times. The monopoly of Johnson and Johnson in baby skin care market is challenged by Dabur in the baby massage oil segment.... The market increased in size from INR ~ million in 2008 to INR ~ million in 2013.

Figure: India Baby Massage Oil Market Size on the Basis of Revenue in INR million, 2008-2013
The baby diaper market is one of the largest contributory segments, after baby food, to the total baby care market revenue with a contribution of approximately ~% in 2013. The major growth drivers of this segment are rising disposable incomes of the households, increasing attention to baby’s health and surging population of babies in India.

### Table: Growth Potential of Baby Diaper Industry in Different Countries of the World

<table>
<thead>
<tr>
<th>Country</th>
<th>Billion Units/Year</th>
<th>Billion Units/Year</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Maximum Market Potential</td>
<td>Present Market Potential</td>
</tr>
<tr>
<td>India</td>
<td></td>
<td></td>
</tr>
<tr>
<td>China</td>
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<td>UAE</td>
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<td>Singapore</td>
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The baby toiletries market has grown at a CAGR of 16.4% during the period 2008-2013. The market in the year 2013 has increased by 17.3% to INR ~ million as compared to INR ~ million in 2012.
With rising household income and changing consumer attitude, the baby care market in India is undergoing rapid alteration. Currently, the domestic market for such products is at a very nascent stage owing to the restricted consumer behavior but is expected to transpire as one of the world’s fastest growing baby care markets. The market is anticipated to touch new horizons with the rising 0-4 year’s population base and increasing preference of parents to spend on baby care products...

The online baby care products market was valued at INR ~ million in 2008, growing to INR ~ million in 2013 with a CAGR of 25.4% for the review period, 2008-2013. The contribution of Toiletries segment is maximum to the online market with a percentage contribution of ~ % as of 2012 to the total online market revenue. The second largest contributory segment is Baby Apparels with percentage contribution of more than 30% in 2012.
As the new age parents in the country are overcoming the reluctance to use baby care products, the demand for such products is escalating… The major players in this market are Babyoye.com and Firstcry.com, both conceptualized in 2010 and at present are the leading players in the baby care industry each having a market share of ~% and ~% respectively as recorded in 2012. Both these stores are the most preferred online baby care products stores by parents which suffice their significant market share in the online baby care market…

Table 2: Key Performance Indicators of Major Players in Online Baby Care Products Market in India

<table>
<thead>
<tr>
<th>Players</th>
<th>Best Selling Product</th>
<th>Average Order Size/day</th>
<th>Number of orders/day</th>
<th>Way of Sourcing Products</th>
</tr>
</thead>
<tbody>
<tr>
<td>Babyoye.com</td>
<td></td>
<td></td>
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<td></td>
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MARKET SHARE OF MAJOR PLAYERS IN INDIA BABY CARE PRODUCTS MARKET, 2012

BY SKIN CARE, 2012

BY MAJOR PLAYERS IN BABY MASSAGE OIL MARKET, 2012

…Massage oil is the largest contributor to the skin care segment. With products such as Dabur Lal Tail and Dabur Baby olive oil Dabur has held dominant position in the market, capturing a market share of ~% as recorded in 2012…Johnson and Johnson occupy the second position in massage oil having a market share of ~% in 2012. Although, it is the market leader in baby personal care segment, it occupies a small market share in baby massage oil segment as its penetration is restricted to urban areas…

Figure: Market Share of Major Players in Baby Massage Oil Market on Basis of Their Revenue Contribution in Percentage (%), 2012

- Dabur
- Johnson & Johnson
- Wipro
- Emami
- Others
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