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# code of nature<sup>®</sup>

**SYMRISE ASIA PACIFIC'S CUSTOMISED  
CONSUMER STUDY ON NATURALNESS\***

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***Flavored Water***

[www.codeofnature.symrise.com](http://www.codeofnature.symrise.com)



**\*Conducted in Q4 2018**

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Curious to find out whether **naturalness is a key purchase driver** for flavored water?



Keen to discover **what naturalness means for YOUR customers** and how to address it?

## Symrise Has Decoded Naturalness in 3 Key Asia Pacific Countries:

### Australia, China & Japan



#### Consumers:

What are the naturalness attitudes and how could those attitudes be translated into new opportunities?



#### Flavored Water:

What are the key product cues that drives the consumers' naturalness perception?



## Naturalness Opportunity Exists Across All 3 Countries

### Australia

Australians are discerning consumers with an eye on their budget – there is **strong demand for healthy and natural products but at the right price.**

### China

**High value market for natural products**, as consumers are driven less by budget and more by health and safety concerns.

### Japan

Evolving health attitudes in a market who pays attention to what they consume. Opportunity to **educate consumers on long term health benefits of natural products.**

## Market Size# for Flavored Water



### Australia

2018	3 Years CAGR
Value : €8M	+ 12.0%
Volume: 5.3M ℓ	+ 8.6%



### China

2018	3 Years CAGR
Value : €300M	+ 12.8%
Volume: 126.2M ℓ	+ 14.6%



### Japan

2018	3 Years CAGR
Value : €1,026M	+ 7.5%
Volume : 608.6M ℓ	+ 5.2%

#Value, Volume and 3 Years CAGR from 2018 to 2021 (GlobalData)

## Main Purchase Drivers For Flavored Water



Natural



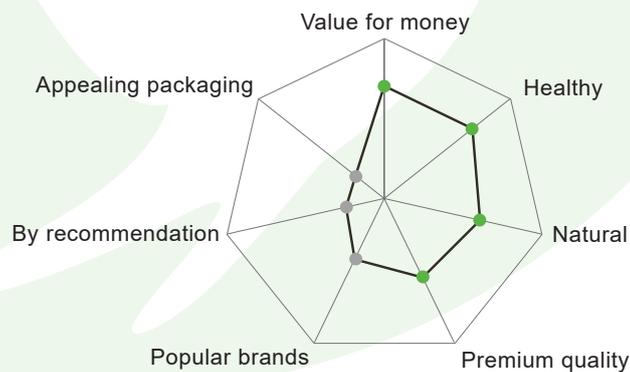
Healthy



Premium quality



Value for money



## High-value Consumer Groups\* for Flavored Water



### Brand conscious affluents

- Quality-focused, seeking assurance from reputable brands and origin info.
- Largest pool of Flavored Water drinkers.
- Strong capacity and willingness to spend more on natural Flavored Water

### Health conscious shoppers

- Concerned about long-term health, therefore pays attention to ingredients
- Mindful of budget
- Naturalness is as important to them as Value & Health

### Ingredients source seekers

- Naturalness of ingredients is as important to them as Value, Healthy & Quality.
- Focuses and seeks information/transparency on product/production origin

### Budget conscious affluents

- Seeks out budget-friendly and hassle-free options for the best value
- Most likely to drink Flavored Water for healthy boost
- Willing to pay a premium



### Brand conscious affluents

- Quality and authenticity are important drivers, and willing to pay premium for these.
- Seek assurance by going for organic or reputable brands.

### Ultimate truth seekers

- Health-focused
- Seeks information and transparency on product origin



### Impulsive brand shoppers

- Seeking Healthy and Popular Brands over Naturalness, but generally accepting of high premium for natural products

### Health conscious premiums

- Health and Quality focused. Capacity and willingness to pay more for quality.
- Willing to pay a premium for natural for healthy boost or self-treat.

### Ingredient source seekers

- Ingredients-focused. Seek transparency and information on product origin.
- Prioritize Healthy and Natural in Flavored Water products

\*High-value consumer groups are defined as consumers that demand for natural products and are willing to pay a premium for them

## Consumers Expect Natural Flavors & Natural Ingredients!



### Natural Flavors

"I like natural flavored drink as they **taste like fruit** and they are **refreshing**."



### Natural Products

"If the flavored water is made with coloring or aroma essence, it is unhealthy to drink in the long-term. If it is a **natural product, the safety factor will increase tremendously**."



### Health

"I want to **maintain health by ingesting natural ingredients** such as minerals that exist in nature rather than artificial ingredients."



## code of nature®

With code of nature, Symrise is providing the answer to these changing consumer needs, the consumer dilemma and the resulting industry shifts. It forms an all-embracing concept and philosophy for addressing people's desire for a real natural experience – taking a whole variety of facets into consideration. Consumers therefore receive the real taste of nature they trust, with taste solutions adapted to their wishes.

By combining its multi-faceted expertise, Symrise creates a natural and authentic taste, often amplifying the vital character of the food.

### Four Pillars Underpinning Naturalness



#### Best Naturals

Respectfully sourcing from people and places we know and trust



#### Applied Science

Gentle preparation methods for natural taste



#### Regulatory Guidance

Providing tailored answers to changing consumer needs



#### Consumer Driven

Creating delicious natural taste experiences for your consumers



Keen to find out the size of **naturalness opportunities** (importance of naturalness and premium placed) to drive your business?



Interested to discover the **key product cues and dimension** to influence consumers' perceptions on naturalness for your brands?

**Unlock your business potential in natural flavored water for Asia Pacific with Symrise Code of Nature! Contact your Symrise account manager or email: [codeofnatureapac@symrise.com](mailto:codeofnatureapac@symrise.com)**

**Interested in more insights on naturalness from Symrise on the Beverage, Dairy and Culinary segments? Please send us an email: [codeofnatureapac@symrise.com](mailto:codeofnatureapac@symrise.com)**

