

DUPONT GREEN LIVING SURVEY: INDIA 2014

**Consumer Awareness and Adoption
of Biobased Products |**

A study by TNS Global

Sponsored by:



CONTENTS

- Executive Summary
- Methodology
- Key Findings
- Biobased and Green Consumer Products
- Study Details
- Voices on Green Living

EXECUTIVE SUMMARY

To better understand the needs of our customers and the markets in which we work, DuPont has commissioned an annual study gauging consumer awareness and attitudes towards green & biobased products.

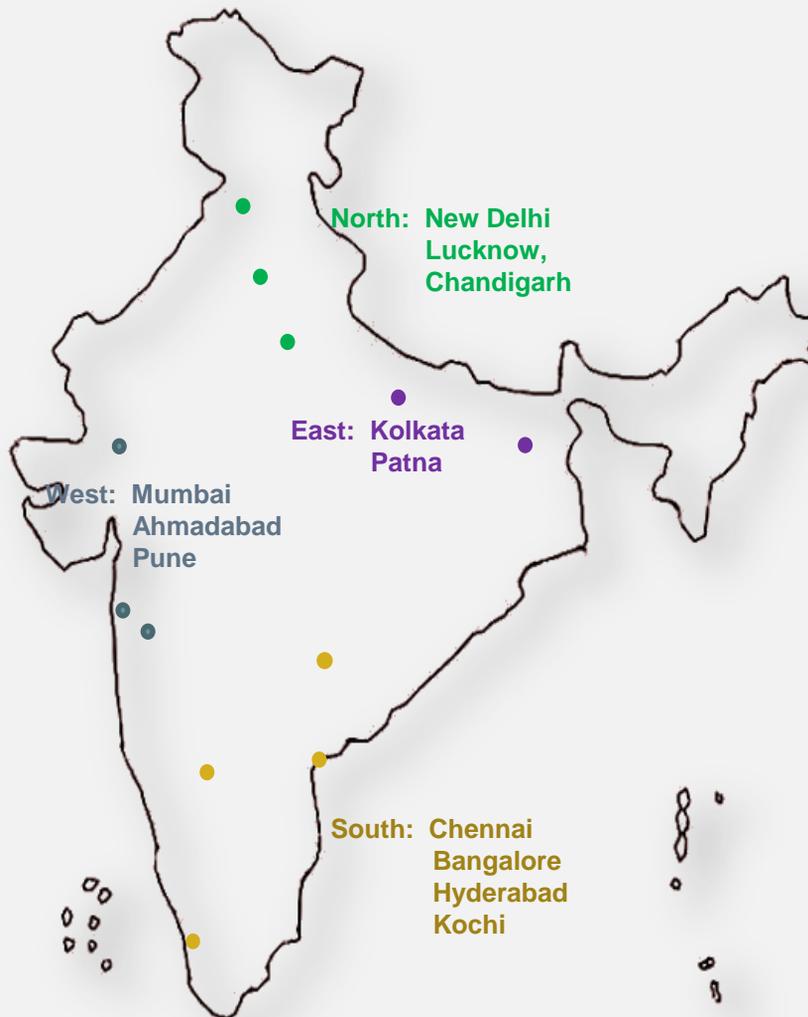
DuPont Green Living Study: India 2014 is the third in our series, following North America (U.S. and Canada) and China. Our goal is to deeply understand regional trends so that we can develop truly market-driven science innovations for the world's growing population.

The research is based on face to face interviews conducted by TNS Global with 1270 Indian consumers in New Delhi, Mumbai, Ahmadabad, Pune, Kolkata, Chennai, Bangalore, Hyderabad, Lucknow, Chandigarh, Patna and Kochi.

The study found that a majority of Indian consumers are familiar with green products, have confidence that green products are better for the environment and feel that biobased ingredients enhance the desirability of a product.

India's confidence in green and biobased products is highest in global index, driven by the younger generation who believe biobased ingredients enhance the desirability of green products.

METHODOLOGY



- 1,270 Face-to-Face interviews with Indian consumers in 12 major cities
- Average of 100 interviews per city
- Equal representation of urban households across SEC levels A, B and C (classified on the basis of education and occupation of the chief wage earner)

RESEARCH DESIGN- GEOGRAPHIC REPRESENTATION

This table shows the actual numbers of interviews completed in each city and their distribution by region.

	Total	North	East	West	South
Base	(1270)	(303)	(213)	(334)	(420)
Region – North	(303) 24%	100%			
New Delhi	(103) 8%	34%			
Lucknow	(100) 8%	33%			
Chandigarh	(100) 8%	33%			
Region – East	(213) 17%		100%		
Kolkata	(103) 8%		48%		
Patna	(110) 9%		52%		
Region - West	(334) 26%			100%	
Mumbai	(114) 9%			34%	
Ahmadabad	(110) 9%			33%	
Pune	(110) 9%			33%	
Region - South	(420) 33%				100%
Chennai	(102) 8%				25%
Bangalore	(107) 8%				25%
Hyderabad	(106) 8%				25%
Kochi	(105) 8%				25%

KEY FINDINGS

- A majority of Indian consumers are familiar with green products
 - Two third of consumers are familiar with green products
 - Familiarity is highest among younger consumers with 69%
 - Regionally, familiarity of green products was found to be highest in South (83%) and East (68%), followed by West (42%) and North (53%). Consumers from South India are also most confident (95%) that green products are better for the environment
 - Awareness of green products is high across the country, with younger consumers below age 30 showing the highest level of familiarity (69%) followed by ages 51+ (60%) and ages 31-50 (58%)
- They have confidence that green products are better for the environment
 - Among those who are familiar, 85% consumers are confident that green products are better for the environment
 - India's confidence in green products being better for the environment (85%) is higher than other countries surveyed by DuPont in previous years. Previous studies showed China with 70% confidence, Canada with 65% and USA with 60%
- They feel that biobased ingredients enhance the desirability of a product
 - Currently, more than two thirds (67%) of consumers are likely to purchase apparel, personal care, hygiene and household products made from biobased ingredients that offer environmental benefits

WHAT IS A BIOBASED PRODUCT?

- Commercial or industrial products that are composed – in whole, or in significant part – of biological materials
- Uses renewable resources as a feedstock (agricultural material)
- Often replaces petroleum-based ingredients



ABOUT GREEN CONSUMER PRODUCTS

Textile Processing & Clothing



Renewable Fibre & Products



Personal Hygiene and Care



Detergent for Laundry



Food & Beverage Packaging

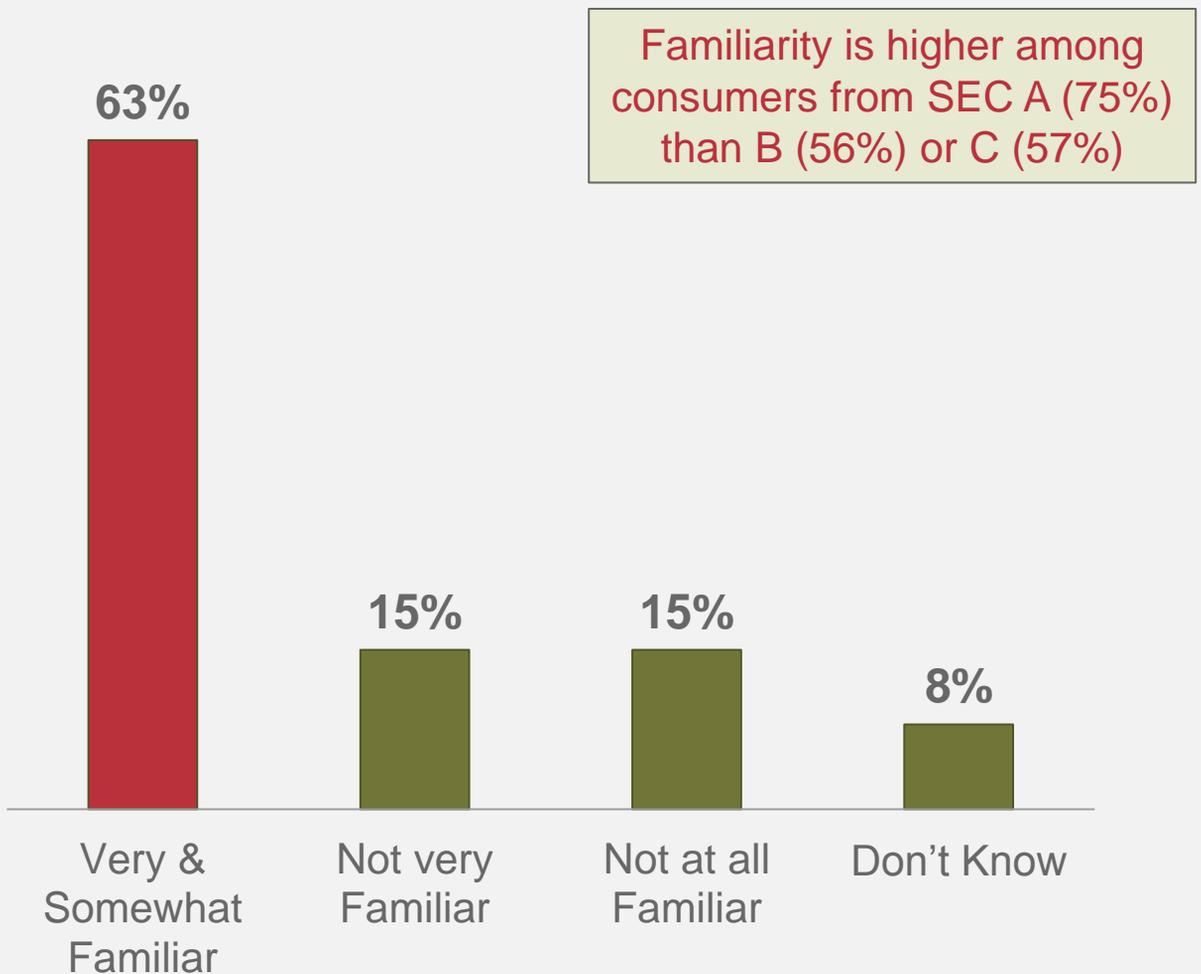


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Consumer Awareness of Green Products

CONSUMER AWARENESS OF GREEN PRODUCTS

Two thirds of consumers are familiar with green products

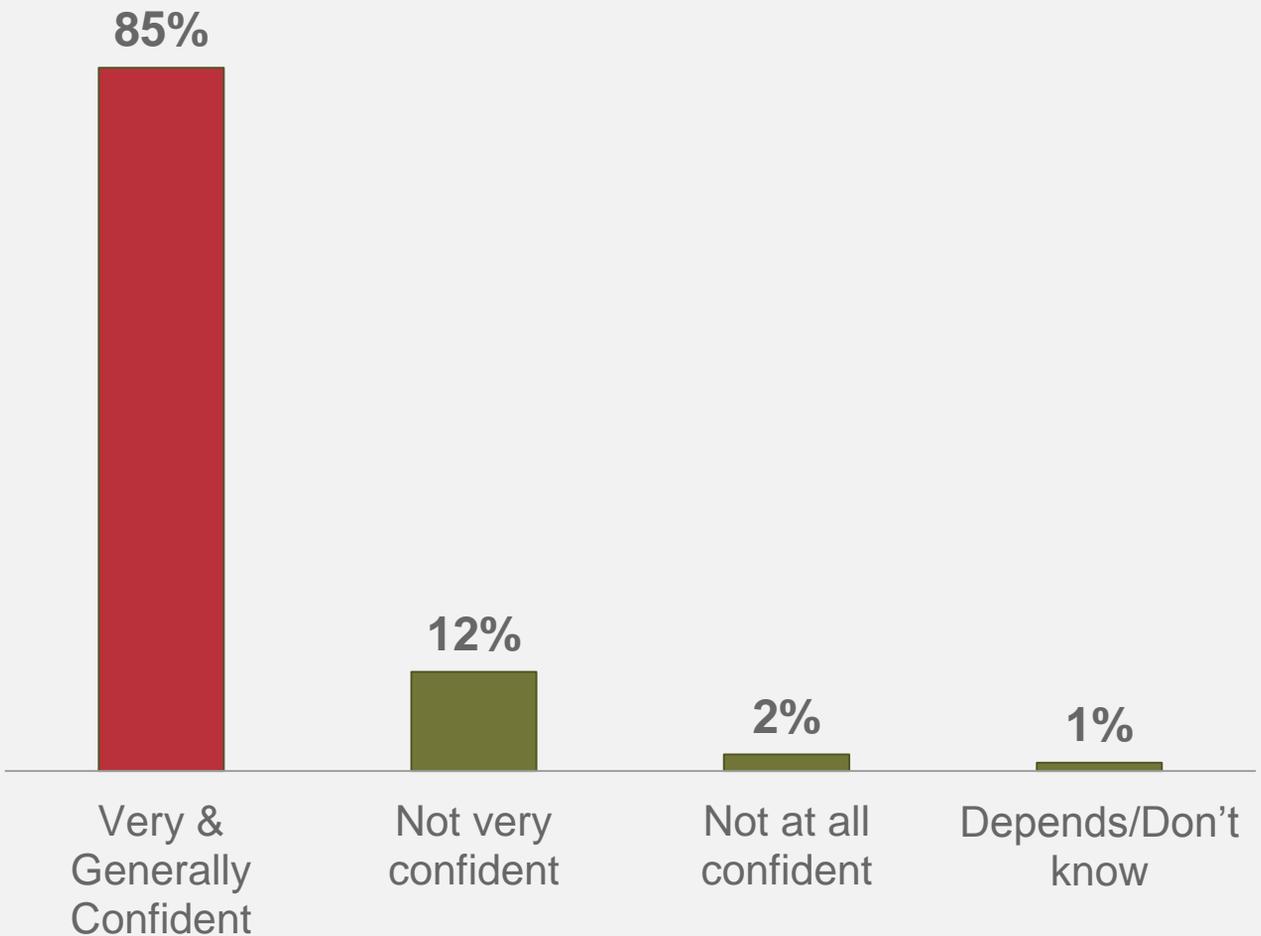


Q. How familiar would you consider yourself to be with household and consumer products that are labeled or promoted as “green products” or “go green products”, that is, better for the environment than comparable products?

Base: 1270 (Total Sample); [Base: 414 (SEC A), 432 (SEC B), 424 (SEC C)]

CONFIDENCE IN GREEN PRODUCTS AS BETTER FOR THE ENVIRONMENT

Among those who are familiar, **85%** consumers are confident that green products are better for the environment

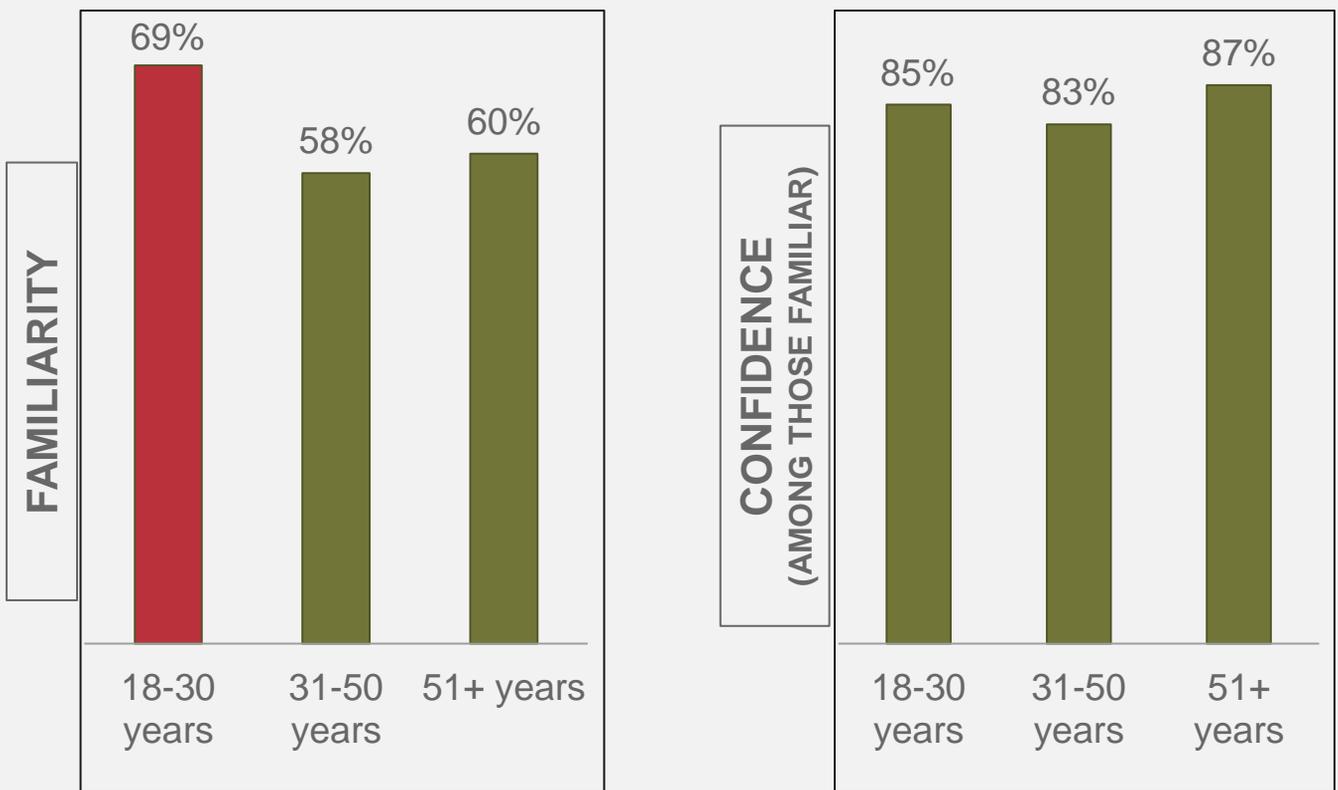


Q. How confident are you that most green products or “go green products” in the market today are really better for the environment than other products?

Base: 985 (those who were very/somewhat/not at all familiar with green products)

CONSUMER AWARENESS & CONFIDENCE IN GREEN PRODUCTS – AGE

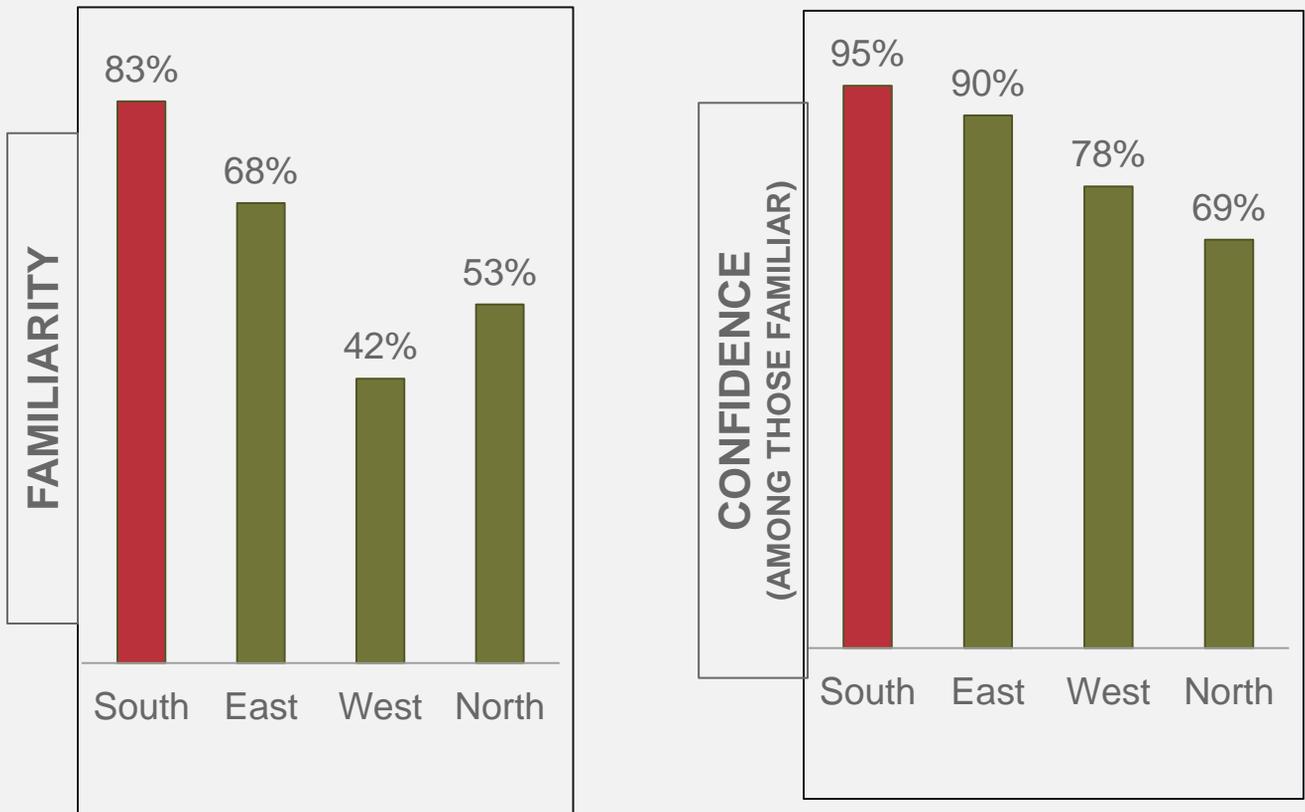
The awareness of green products is highest among younger consumers; however, confidence is equally high among all those familiar



Base: Familiarity: 521 (Ages 18-30), 570 (Ages 31-50), 179 (Ages 51+)
Confidence: 428 (Ages 18-30), 424 (Ages 31-50), 133 (Ages 51+)

CONSUMER AWARENESS & CONFIDENCE IN GREEN PRODUCTS – REGIONAL

Consumers from south India are most familiar and confident that green products are better for the environment

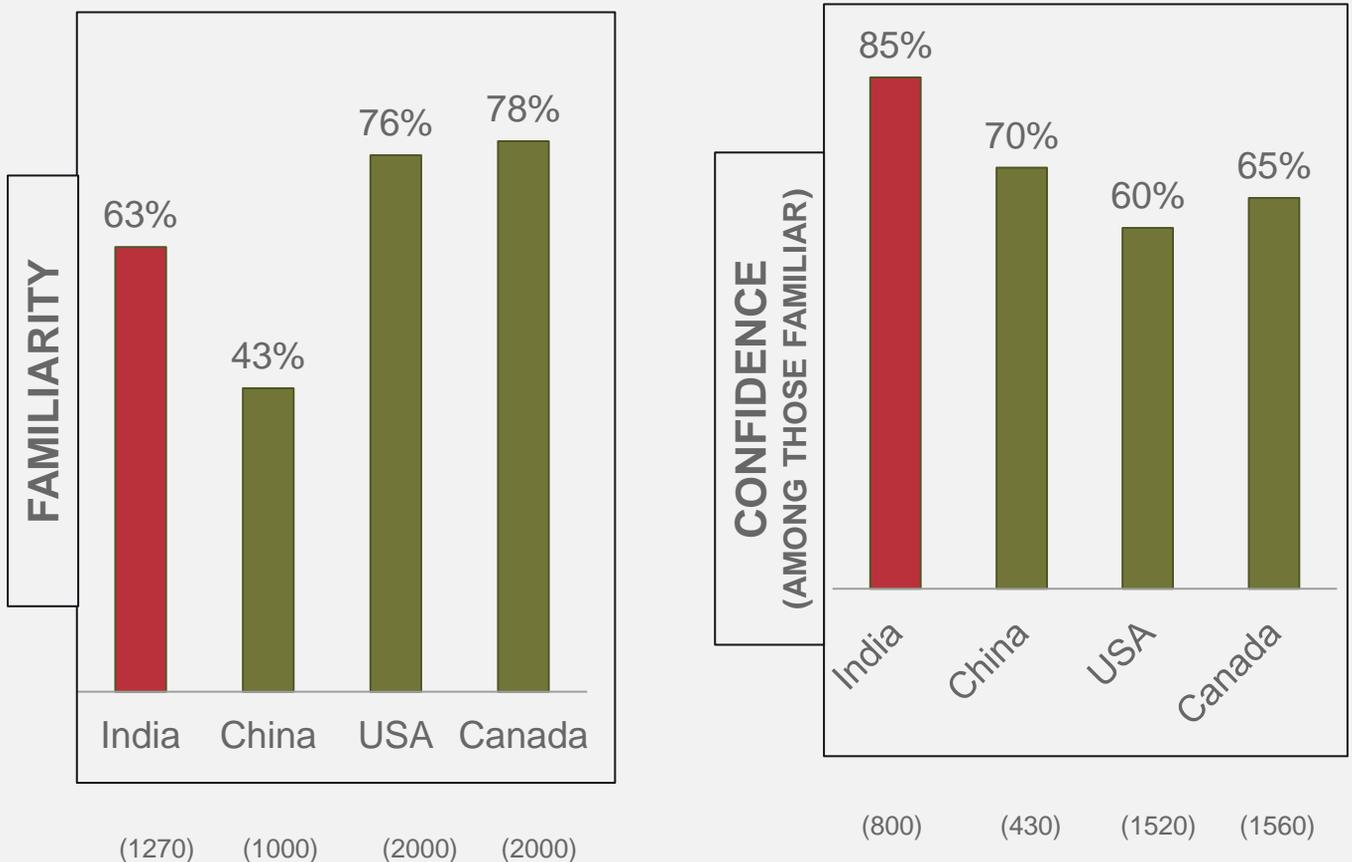


Base: Familiarity: 420 (South), 213 (East), 334 (West), 303 (North)

Confidence: 385 (South), 179 (East), 199 (West), 222 (North)

CONSUMER AWARENESS AND CONFIDENCE IN GREEN PRODUCTS – COUNTRY COMPARATIVE

India's confidence that green products are better for the environment is higher than other countries surveyed by DuPont in previous years*



* Previous DuPont Green Living studies conducted by Environics Research Group

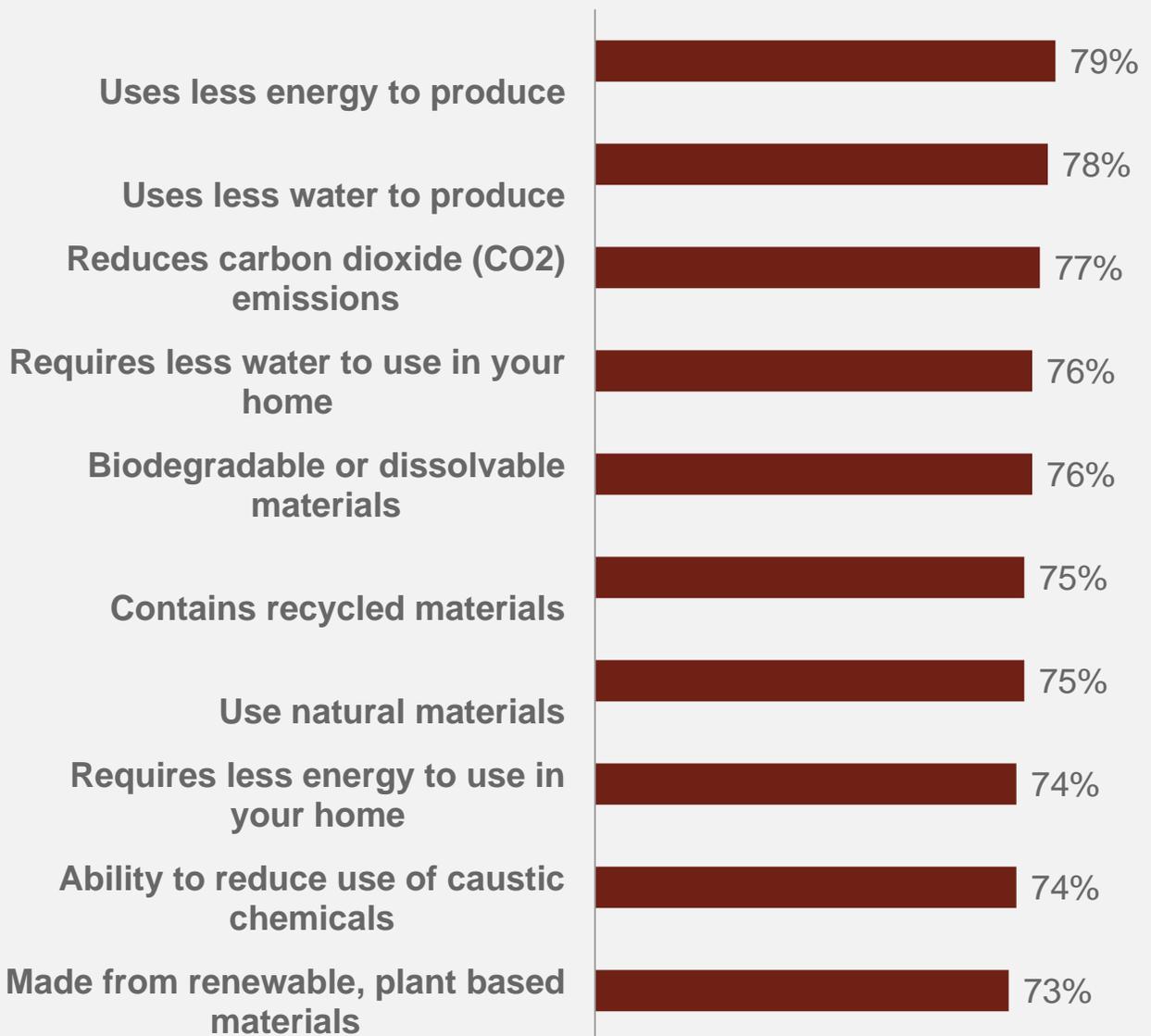


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What makes a product green?

CONSUMERS HAVE HIGH EXPECTATIONS FROM THE BENEFIT OF GREEN PRODUCTS

The range of values across the characteristics is narrow in India indicating consumer acceptance of and expectation from green products



Q. Please tell me if you believe each of the following characteristics definitely, likely, likely not, or definitely not makes a product a green product. Sum of Definitely and Likely responses

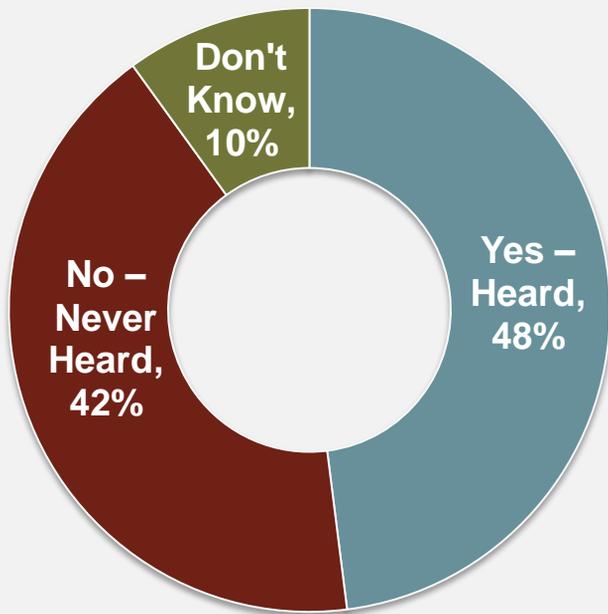
Base: 1270 (Total Sample)

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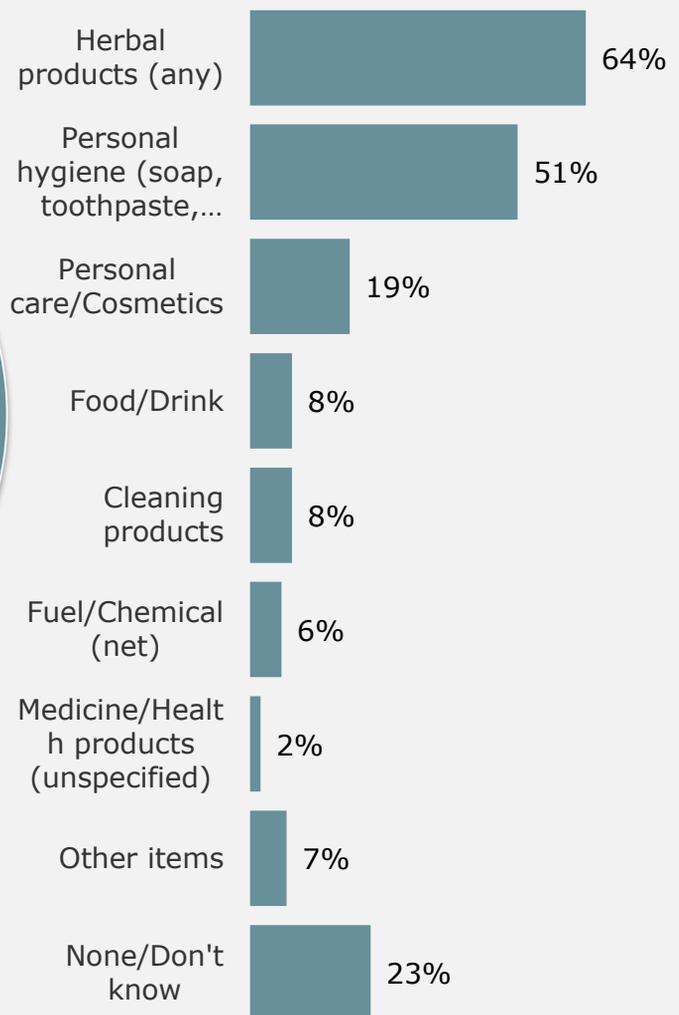
Awareness and Perceptions of Biobased Products

CONSUMER AWARENESS OF TERM “BIOBASED”

Indian consumers commonly think of products with “herbal” ingredients and items used for personal hygiene as biobased



Total Aware of term “Biobased”

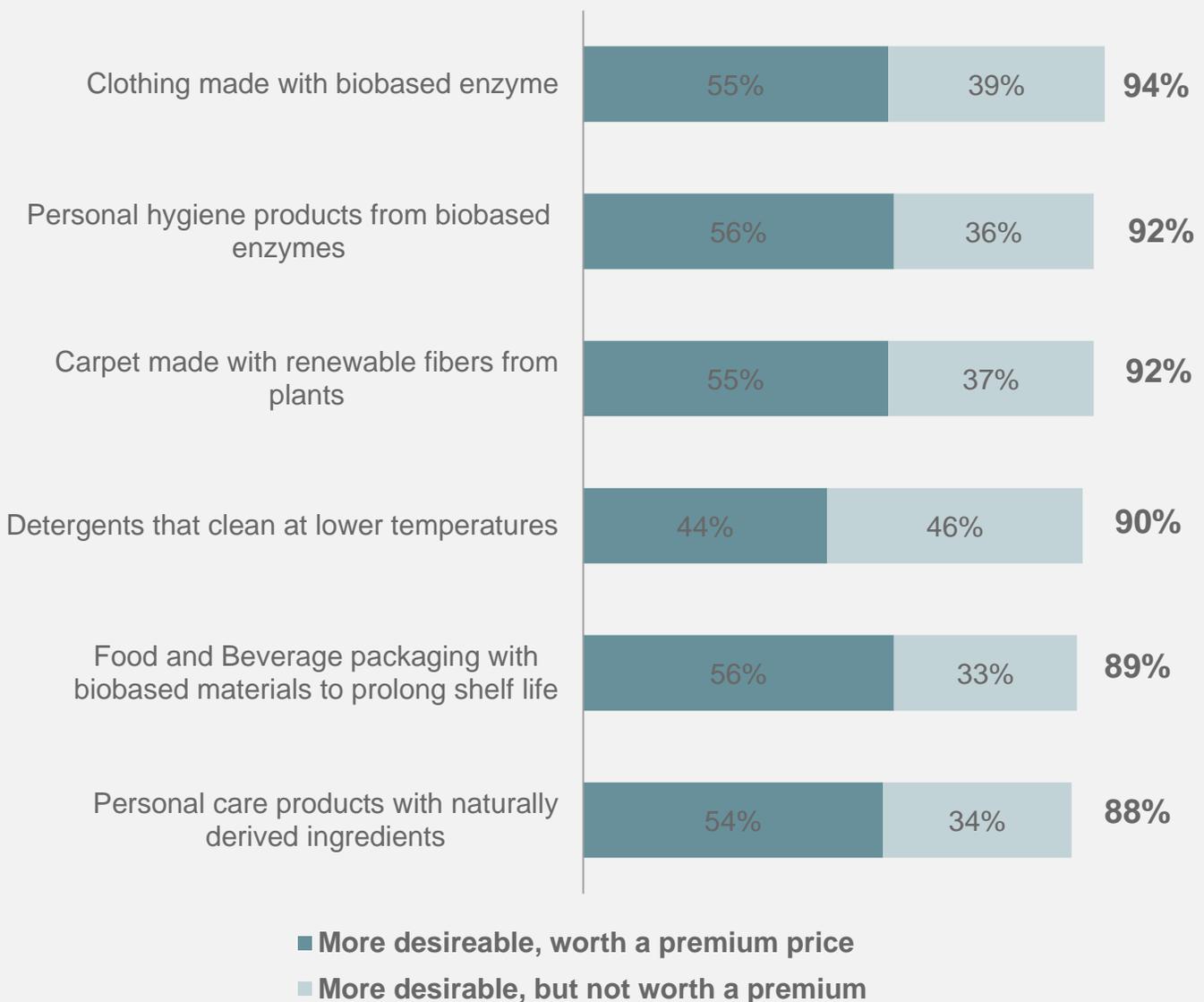


Unaided Awareness of Biobased Ingredient Products

Q. Do you ever recall hearing the term “biobased” to describe products or product ingredients?
 Q. The term “biobased” is used to describe products or product ingredients made from renewable agricultural materials that are used in place of petroleum based ingredients in the manufacture of consumer products such as clothes, detergent and others. What products, if any, are you aware of that are made with or contain biobased ingredients? (Open-end, unaided mentions) Base: 1270 (Total Sample)

IMPACT OF BIOBASED INGREDIENTS ON DESIRABILITY

Buyers interested in each product feel that biobased ingredients enhance the product's desirability, with half or more saying worth a premium price



Base: ranges between Q. You mentioned that you definitely or like would purchase (insert). How does biobased impact your desire for the product? Would you say "biobased" makes it: ...
 n 943 and 1016 (varies depending on interest in product)

INFLUENCER SPEAK

“If we have to move from hydrocarbon based economy to carbohydrate based economy, then the challenge is to create a 'bioeconomy' leading to our 'biofuture' for mankind.”

Dr. Raghunath Anant Mashelkar
President, Global Research Alliance

(9th World Congress of Chemical Engineering, Korea, 2014)

“India could take the lead in green governance if Team Modi takes the right initiatives.”

Dr. R K Pachauri
Director General, The Energy and Resource Institute

(3rd United Nations Public Lecture 2014, New Delhi)

“India with its research capabilities and scientific community is well positioned to take the next step in its journey towards emerging as the global hub for biotech research and business excellence and Indian government is committed to provide all necessary support.”

Dr. K. Vijay Raghavan
Secretary, Department of Biotechnology and Secretary (AC), Department of Science & Technology

(BIO 2014, San Diego)