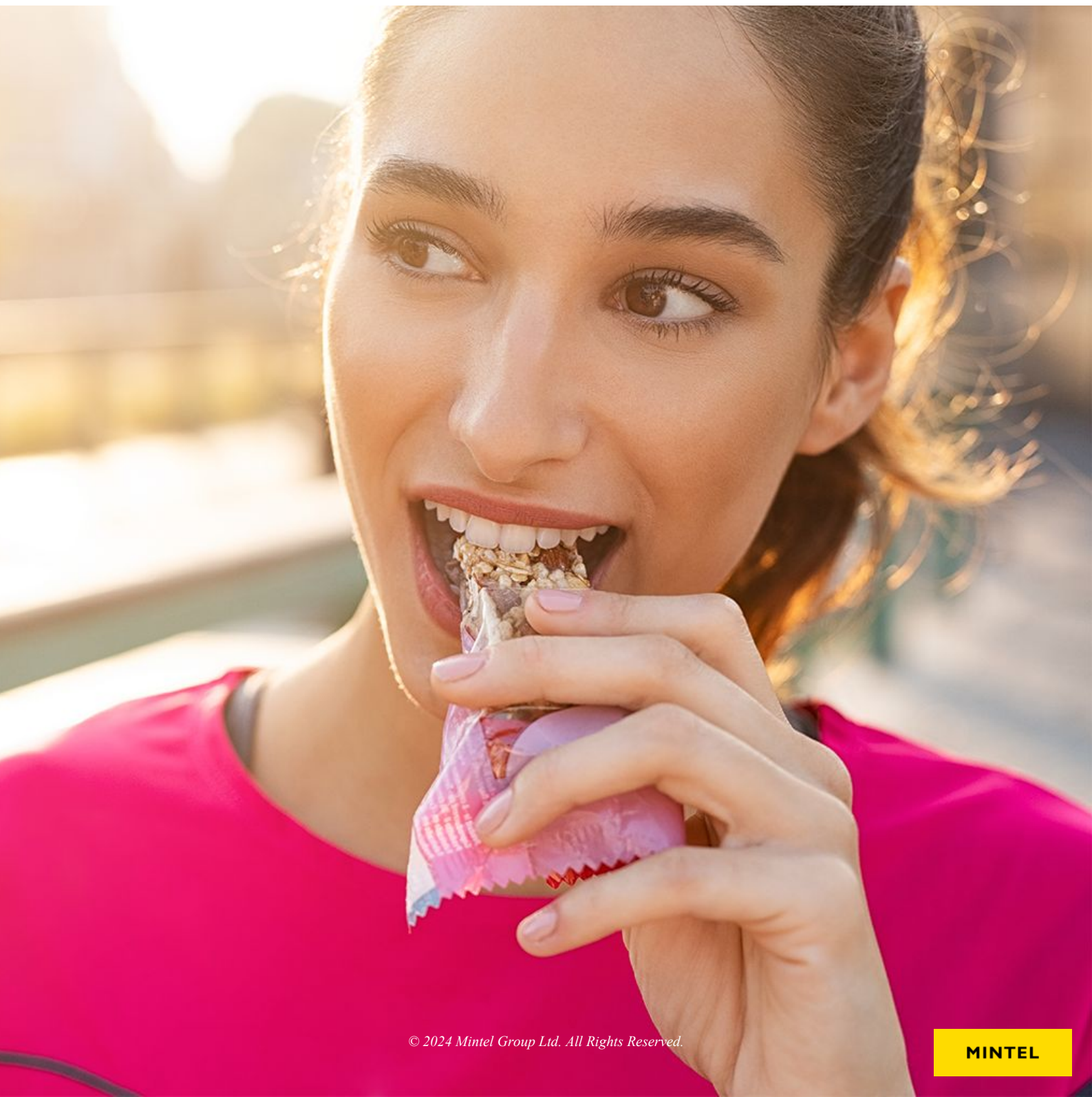


ATTITUDES TO SNACKING – INDIAN CONSUMER – 2020

Opportunity lies in boosting the consumption of snacks by more specifically targeting needs of less-frequent snackers.



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Report Content

- What you need to know

EXECUTIVE SUMMARY

- Intel's perspective
- Almost all snackers eat salty snacks
- Offer occasion-specific differentiated snacking proposition
- Keep a close eye on snack bar format
- What this means

KEY TRENDS

- What you need to know

Global trends and how they are playing out in India

- Intel Trend: Supernanny State
- Intel Trend: Transumers
- Intel Trend: Extend My Brand

Key drivers

- Companies line up major investment plans in anticipation of future growth in the Indian snacks segment
- Lifestyle-related diseases on the rise in India
- Indian paediatricians issue guidelines to tackle the issue of obesity
- Binge watchers drive consumption at home
- Offer bedtime snacks to sleep-deprived Indians
- Snack brands use the power of celebrity endorsements to build engagement

CONSUMER INSIGHTS

- What you need to know

Snacking in India: A snapshot

- Snacking is a ubiquitous habit among Indians
- Indians eat a wide variety of snacks
 - Graph 1: Repertoire of types of snacks eaten, by age, Dec 2019
- Willingness to try new foods fuels young consumers' wide snack repertoire
- Salty snacks dominate the category

Attitudes to Snacking – Indian Consumer – 2020

- Graph 2: Types of foods eaten as snacks, Dec 2019
- Potato chips and mixtures are the most popular snacks
 - Graph 3: Consumption of salty snacks, Dec 2019
- Regional snacking profiles
- Popularity of snacks varies by region
 - Graph 4: Consumption of snacks, by region, Dec 2019

Driving India's snacking habit

- There's room to make snacking more of a daily habit
 - Graph 5: Frequency of eating snacks, % of respondents, Dec 2019
- Defining snacker groups
- Key characteristics of snacker groups: regular snackers
- Key characteristics of snacker groups: non-regular snackers
- Snacking peaks among the young and city dwellers
 - Graph 6: Snacking frequency by age and city tier, Dec 2019
- Snacking peaks among the young and city dwellers
- Potential target: parents
- Parents snack less and make healthier choices when they do
 - Graph 7: Regular snackers by parent status, Dec 2019
 - Graph 8: Consumption of select snack foods, by parental status, Dec 2019
- Most snacks see usage fall among older consumers
 - Graph 9: Consumption of select types of snacks, by age, Dec 2019
 - Graph 10: Consumption of select types of snacks, by age, Dec 2019
- Tap older snackers with better-for-you innovation in familiar formats

Opportunities in targeting day-parts

- Tap different snacking times throughout the day
- Occasion and time of day determine snack attributes sought
- Occasion and time of day determine snack attributes sought
- Energy and nutrition are a higher priority in the morning
 - Graph 11: Energising as a snack attribute, by time of the day, % of respondents, Dec 2019
- Scope for afternoon snacks to embrace satiety and nutrition
 - Graph 12: Select snack attributes by time of the day, Dec 2019
- Evenings call for fun and savoury snacks
 - Graph 13: Select snack attributes, by occasion, Dec 2019

Emerging habits: Out-of-home and solo snacking

- Home is where people snack the most
- Home is where people snack the most

Attitudes to Snacking – Indian Consumer – 2020

- Too Yumm! explores association between content watching and healthy snacking
- Younger consumers snacks out of home the most
 - Graph 14: Consumption of salty snacks out of home by age, Dec 2019
- 'Us-time' snacking trumps; 'me-time' is burgeoning
- 'Us-time' snacking trumps; 'me-time' is burgeoning
 - Graph 15: Consumption of salty snacks with family and friends vs alone, by age, Dec 2019
- In summary: Consumer insights

MARKET APPLICATIONS

- Opportunities: Key areas of focus

Target specific day-parts

- Amplify the role of snacks as an energy provider, especially in the morning
 - Graph 16: Snack launches with a functional – energy claim, Feb 2017-Jan 2020
- "India's first bottled smoothie" taps into the morning occasion
- Beans, grains and vegetable-based snacks with energy claims
- Expand into lunch occasions; blur lines with meals
- Wingreens Farms mimics North Indian meal in a chip-and-dip combo pack
- Nuts for afternoon cravings and snack pack in a bar
- Lay's delves into local flavours and food habits to tap meal accompaniment occasion
- Explore the after-dinner snacking opportunity
- Ice cream and cream biscuits can be offered as post-dinner guilt-free snacking options
- Use calorie-controlled, single-portion formats to tap me-time indulgence
- Break category barriers to entice new consumers across categories

Better-for-you snacks for kids and seniors

- Innovate snacks for parents and kids
- Take lessons from start-ups in kids' snacking space
- Associate with schools to promote healthy eating among students
- Plus, minus and functional claims enhance "better-for-you" credentials
 - Graph 17: Snack* launches by select claim category, Dec 2015-Jan 2020
- Leading "better-for-you" claims
- Offer L/N/R salt variants in traditional snacks to boost consumption among consumers aged 45+
- Healthy snacks in familiar formats will appeal to older consumers
- Calling out functional benefits can encourage seniors to snack
- Snack bars focus on cardio/heart health
- Steamed snack delivers a perception of home-cooked freshness
- Snack subscription services boost healthy snacking

Cater to on-the-go lifestyles

- Offer elevated convenience to help consumers snack on the go
 - Graph 18: Snack product launches with on-the-go claims, Feb 2016-Jan 2020
- Single-portion, individually wrapped formats see launch activity across sweet snack categories
- Globally, biscuits brands embrace on-the-go innovation with resealable packaging
- Explore snack bars' ability to offer convenience on the go
- Snack bar brands prominently call out ingredients on front of pack
- Snack/cereal/energy bars address a range of health functions
 - Graph 19: Top functional claims in snack/cereal/protein bars Feb 2015-Jan 2020

Global innovations

- Good Source offers functional benefits at the right time of day
- Brazilian snack brand varies formulations to tap snacking occasions through the day
- Asia Pacific Breweries unveils potato chips for sports nights
- Meat/bean/seed snacks are front-runners in high-protein claim
- Root, bean and legume-based snacks are inherently high in nutrition

APPENDIX

- Consumer survey methodology
- Definitions

About Mintel India Consumer

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02

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03

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