

# BISCUITS & COOKIES – INDIAN CONSUMER – 2020

Resilient to the pandemic, the category will show quick recovery. Better-for-you innovations will drive value growth; balancing health and indulgence is the key.



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# Report Content

## EXECUTIVE SUMMARY

- What you need to know
- Mintel's perspective

### Market context

- Impact of COVID-19 on biscuits and cookies
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- Impact of COVID-19 on biscuits and cookies
- Global trends impacting biscuits category in India
- Indians seek healthy lifestyle
- India is a country of youth; keeping them engaged is key to the future growth of the category

### What consumers want and why

- Consumers want: healthier, yet tasty biscuits
- Balance health and indulgence to maximise consumption
  - Graph 1: Consumption of indulgent biscuits, by frequency, Mar 2020
  - Graph 2: Consumption of healthy biscuits, by frequency, Mar 2020
- Consumers want: to improve immune system
- Consumers want: high satiety and weight management
- Consumers want: de-stressing and relaxation benefits
- Consumers want: freshly-baked biscuits

### Opportunities

- Deploy biscuits to help consumers with weight management
- Offer breakfast biscuits to metro and tier-1 consumers
- Make indulgent biscuits permissible
- Biscuits can help consumers boost immune system

### Competitive landscape

- Amidst the COVID-19 pandemic, biscuit brands in India exhibit acts of goodwill
- New product development ups the indulgence ante
- New product development also has healthfulness on the agenda

### Mintel predicts

- Resilient to the pandemic, biscuits category to exhibit quick recovery

### THE IMPACT OF COVID-19 ON BISCUITS AND COOKIES

- The outlook for the Indian food and drink industry
- The outlook for the Indian biscuits and cookies category
- The impact of COVID-19 on biscuits and cookies
- SWOT analysis: The impact of COVID-19 on biscuits and cookies
- SWOT analysis: The impact of COVID-19 on biscuits and cookies
- Increasing income uncertainty will push consumers to cut spends
  - Graph 3: consumer outlook on impact of COVID-19 outbreak on unemployment, by age, 11 – 13 May 2020 vs 22 – 29 May 2020
- Increasing income uncertainty will push consumers to cut spends
- How consumer behaviour will change and what brands can do
- How consumer behaviour will change and what brands can do
- The marketing mix: Product
- The marketing mix: Price and place
- The marketing mix: Price and place
- The marketing mix: Promotion
- The marketing mix: Promotion
- In summary: Adapting to the new normal

### KEY TRENDS

- What you need to know

#### Global trends and how they are playing out in India

- Mintel Trend: Slow It All Down
- Mintel Trend: Help Me Help Myself

#### Key drivers

- Health is top of mind for Indians
  - Graph 4: Measures taken in an attempt to live a healthy lifestyle, February 2019
- The youth are key consumers, and seek newness
  - Graph 5: Median population age by 2022
- Biscuits can help Indians de-stress

### CONSUMER INSIGHTS

- What you need to know

## Biscuit consumption overview

- Biscuits, cookies and crackers are universally consumed
- Biscuits, cookies and crackers are universally consumed
  - Graph 6: Consumption of any biscuit, by age, region and city tier, March 2020
- Salted, glucose and Marie biscuits are the most consumed varieties in India
- Salted, glucose and Marie biscuits are the most consumed varieties in India
  - Graph 7: Consumption of biscuits, by type, March 2020
- Over four in 10 people eat seven or more product types
  - Graph 8: Repertoire of types of biscuits eaten, by age, March 2020
- Over four in 10 people eat seven or more product types
- Popularity of biscuits varies by region
  - Graph 9: Consumption of different biscuit types, by region, March 2020
- Widen consumption occasions and increase consumption frequency for individual biscuit types
  - Graph 10: Frequency of consumption of biscuits, by type, March 2020

## Who is the healthy biscuit consumer?

- Defining healthy biscuit users
  - Graph 11: Types of healthy biscuit users, by age, Mar 2020
- Profile: Healthy biscuit users
- Make healthy biscuits tasty; tap into the breakfast occasion
  - Graph 12: Agreement with select attitude statements, by user groups, March 2020

## What consumers want

- Health is a key driver for premiumisation
- Health is a key driver for premiumisation
  - Graph 13: Factors encouraging consumers to pay more, Mar 2020
- Freshly baked biscuits/cookies with healthy ingredients appeal to almost six in 10 consumers
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- Energy-boosting biscuits that improve immunity are likely to appeal to half of consumers
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- Interest in wholegrain
  - Graph 14: Premiumisation factor, wholegrain, by age, region and city tier, Mar 2020
- Biscuits are well-placed to provide immunity boost
- Better-for-you biscuit innovation demands high satiety and weight management
  - Graph 15: Select biscuit features that consumers find appealing, by gender and region, Mar 2020
- More convenient packaging innovation is needed to meet consumer needs

- Offer health in the South, freshness in the East and convenience in the West

### Tackling indulgence

- Defining indulgent biscuit users
  - Graph 16: Types of indulgent biscuits users, by age group, Mar 2020
- Profile: Indulgent biscuit users
- Gen Zs are prime targets for premium indulgent biscuits
  - Graph 17: Gen Z (aged 18-24) consumption of different biscuit types, Mar 2020
- Make indulgent biscuits permissible with hints of healthfulness
  - Graph 18: Premiumisation factors, by indulgent biscuit users, Mar 2020
- Step up to the dessert occasion; offer relaxing benefits
  - Graph 19: Attitudes towards biscuits, by indulgent biscuit user groups, Mar 2020

## MARKET APPLICATIONS

- Opportunities: Key areas of focus

### Better-for-you choices

- Use ancient Indian grains to make BFY biscuits
- Link wholegrain to healthier gut and better immune response
  - Graph 20: % of consumers willing to pay more for biscuits made with wholegrains, by age, March 2020
- Wholegrain biscuits, cookies and crackers have potential to level up with immunity boosting claims
- Promote biscuits as a tool for weight management
  - Graph 21: Share of launches in biscuit category featuring select claims, Apr 2017-Mar 2020
- Deploy high protein for weight management
- Biscuits with dietary fibre must establish a link to satiety and weight loss benefits
- Add a tinge of indulgence to make healthy biscuits tastier

### Higher indulgence is a niche opportunity

- Fight flavour fatigue in cream biscuits
- Biscuit manufacturers around the world tap into the dessert-flavour trend
- Indulgent biscuits can replace indulgent desserts
- Extra fillings and luxurious coatings can drive indulgence
- Use thin format to make indulgent biscuits permissible

### Offer biscuits for breakfast occasion

- Use familiar nutritious ingredients to offer energising biscuits to kick-start the day
- Take inspiration from international breakfast biscuits

### Explore ways to offer 'freshly baked' biscuits/cookies

- Make freshly baked biscuits convenient

- Help consumers make freshly baked cookies at home using microwave or oven

### **Cater to emotional needs with indulgent biscuits**

- Explore relaxation and sleep benefits to offer bedtime biscuits
- Couple biscuits with sweet spreads to amp up indulgence and convenience
- More convenient packaging innovation needed to meet consumer needs
  - Graph 22: Penetration of on-the-go claims in sweet biscuits/cookies launches, Apr 2017-Mar 2020
- Global biscuit brands embrace on-the-go innovation with resealable packaging

### **Global innovations**

- Biscuits for a boost of energy and better focus
- Immunity claims in biscuits see an uptick globally
- Biscuits positioned for on-the-go eating
- Novel formats can add portability and convenience to cookies and crackers
- Globally, breakfast biscuits use natural sweeteners to boost health claims
- Thin cookies and cracker launches gather steam globally
- Ultimate indulgence: A biscuit that ticks all the right boxes

## **APPENDIX**

- Report definition
- Consumer survey methodology
- TURF methodology

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02

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03

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