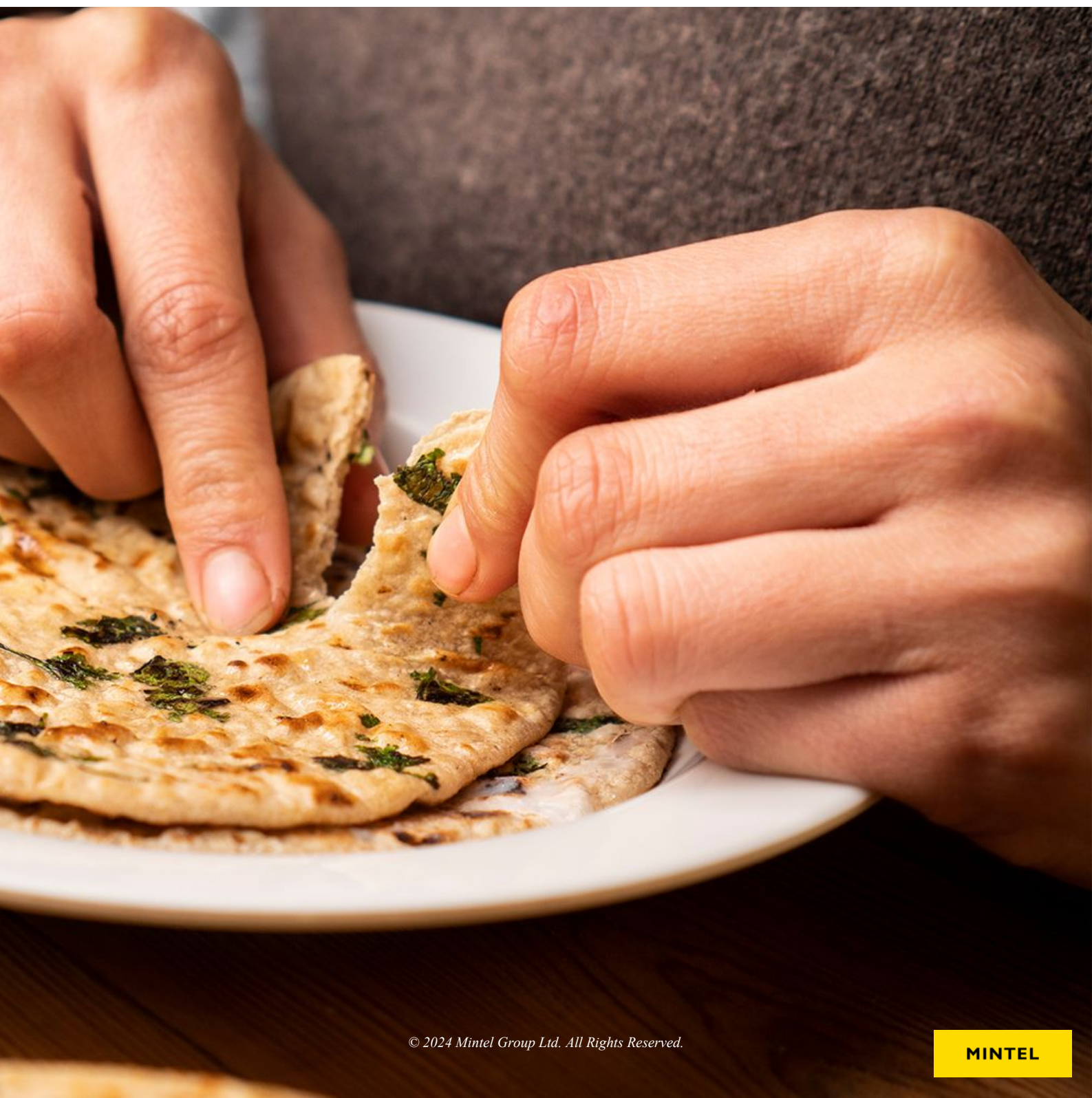


# BREAKFAST FOODS – INDIAN CONSUMER – 2020

The key is to align with consumers' evolving view of what makes a healthy breakfast, and the post-COVID-19 need for easy meals at home.



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# Report Content



## EXECUTIVE SUMMARY

- What you need to know
- Mintel's perspective

### Market context

- Impact of COVID-19 on the breakfast occasion
- Global trends impacting breakfast foods in India
- Increasing urbanisation drives convenience
  - Graph 1: important life goals, by city tier, Mar 2020
- Increase in lifestyle diseases pushes expectations around health
- Home remains at the heart of the breakfast occasion
  - Graph 2: breakfast consumption out of home at least twice a week, by gender and age, Mar 2020

### What consumers want and why

- Metro consumers want: hot, freshly cooked yet convenient breakfast
  - Graph 3: agreement with selected breakfast attitudes, by city tier, Mar 2020
- Consumers want: high protein
- Consumers want: vegetables in their breakfast
- Consumers want: low-salt breakfast

### Opportunities

- Put vegetables front and centre on pack
- Help minimise the efforts put into making breakfast at home
- Breakfast specialists can leverage the snackification trend
- Dive deeper into the functionality of fibre

### Competitive landscape

- Big brands offer traditional Indian breakfast in ready-to-eat formats
- VMS brands vie for space in the breakfast occasion
- Amidst COVID-19 lockdown, Kellogg's Pass The Bowl campaign reminds consumers to not skip or skimp their breakfast

### Mintel predicts

- Opportune time for breakfast brands to demonstrate relevance

## THE IMPACT OF COVID-19 ON BREAKFAST FOODS

- The outlook for the Indian food and drink industry

# Breakfast Foods – Indian Consumer – 2020

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- The outlook for the at-home breakfast occasion
- The impact of COVID-19 on breakfast foods
  - Graph 4: breakfast consumption frequency by location, Mar 2020
- Importance of packaged breakfast options increases as consumers seek easy ways to tackle breakfast occasions
- SWOT analysis: the impact of COVID-19 on breakfast foods
- During the recession, affordability will be key to gaining consumer attention
  - Graph 5: consumer outlook on impact of COVID-19 outbreak on unemployment, by age, 17-21 July 2020
- Make breakfast cooking hassle-free for women
- Variety seekers will experiment with their cooking skills
- On-the-go innovations can extend breakfast foods to all-day snacking occasions
- The marketing mix: product
- The marketing mix: place
- The marketing mix: price
- The marketing mix: promotion
- In summary: adapting to the next normal

## KEY TRENDS

- What you need to know

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

- Snackification of breakfast poses a challenge to the breakfast occasion
- Consumers seek weight management
- Mintel Trend: Supernanny State
- Mintel Trend: FSTR HYPR

### Key drivers

- Majority of Indians don't eat a balanced diet
- Lifestyle-related diseases on the rise in India
- Indians prioritise healthier lifestyles and time management
  - Graph 6: "How important is achieving each of the following in the next three years?" - important, by city tier, Mar 2020
- Couple-only households will find value in time-saving and convenience
  - Graph 7: couple-only and single-mother households
- Consumers have diverse health expectations from their diet
  - Graph 8: "I would ideally like my diet to...", Dec 2019

## CONSUMER INSIGHTS

- What you need to know

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## Breakfast consumption overview

- Eating breakfast is a ubiquitous habit among Indians
  - Graph 9: breakfast eating frequency, by city tier, Mar 2020
- Home is at the heart of the breakfast occasion
  - Graph 10: breakfast consumption location, by frequency of consumption, March 2020
- Home is at the heart of the breakfast occasion
- Young Indians are key out-of-home breakfast eaters
  - Graph 11: eating breakfast out-of-home twice a week or more, by age, Mar 2020
- Profile: the on-the-go (OTG) breakfast consumer
- Leverage portable formats to offer portionability and position breakfast foods as all-day snacks

## What do Indians eat for breakfast?

- Roti, paratha, milk and bread are most popular breakfast choices
  - Graph 12: breakfast items eaten in the last six months, by region, Mar 2020
- Metro city consumers have the widest repertoire of breakfast foods
  - Graph 13: repertoire of breakfast food types, by city tier, Mar 2020
- Cereals and oats are more popular among younger consumers
  - Graph 14: select breakfast items eaten in the last six months, by age, Mar 2020
  - Graph 15: select breakfast items eaten in the last six months, by age, Mar 2020
- Offer premium breakfast options with fruit, yogurt and cereals to SEC A consumers
  - Graph 16: selected breakfast food types, by socioeconomic class, Mar 2020

## What makes a healthy breakfast?

- Keep up with the changing definition of 'healthy breakfast'
  - Graph 17: definition of healthy breakfast, Mar 2020
- Keep up with the changing definition of healthy breakfast
- Vegetable content and energy resonate strongly with parents of under-18s
  - Graph 18: definition of healthy breakfast, by parent status, Mar 2020
- Tier-1 consumers seek high protein and high energy
  - Graph 19: high in protein and high in energy as attributes of healthy breakfast, by city tier, Mar 2020
- Communicate benefits of fibre to create a standout
- Women are more likely than men to equate low salt with health
  - Graph 20: top 10 breakfast cereal markets, by avg sodium (mg per 100g/ml), Jul 2015–Jun 2020

## Attitudes toward breakfast

- Make the process of cooking breakfast effortless
  - Graph 21: select concerns of Indian women who are responsible for preparing routine home-cooked meals, Mar 2020
  - Graph 22: household responsibility, preparing routine home-cooked meals, by age, Mar 2020
- Make the process of cooking breakfast effortless

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- Metro city dwellers are more prone to snackification of breakfast
- Leverage inherent strengths of packaged options and play up health, freshness and affordability
  - Graph 23: agreement with select attitude statements related to breakfast, by city tier, Mar 2020

### Breakfast consumer segmentation

- Cluster analysis: breakfast consumers
- Consumer cluster #1: traditionalists
- Traditionalists: demographic profile
- Traditionalists insist on hot and freshly cooked breakfast
- Traditionalists: opportunity
- Consumer cluster #2: Variety Seekers
- Variety Seekers: demographic profile
- Variety Seekers are liberal about breakfast foods
- Variety Seekers: opportunity
- Consumer cluster #3: Modern Localists
- Modern Localists: demographic profile
- Convenience of packaged food appeals to Modern Localists
- Modern Localists: opportunity
- Consumer cluster #4: Unenthusiasts
- Unenthusiasts: demographic profile
- Unenthusiasts are carefree about breakfast
- The four potential consumer segments to pursue

## MARKET APPLICATIONS

- Opportunities: key areas of focus

### Align with consumers' changing definition of a healthy breakfast

- Breakfast brands can address protein deficiency
  - Graph 24: high/added protein claims in breakfast cereals, Jul 2015-Jun 2016 vs Jul 2019-Jun 2020
- Put protein front and centre of the pack
- Offer sports nutrition benefits and encourage consumers to exercise
- Promote high/added protein claims to target consumers with active lifestyles
- Help Indians eat more vegetables
- Make vegetable breakfast fun for children
- Take inspiration from snacks
- Call out fibre's functional benefits
  - Graph 25: selected claims in breakfast cereals category, Jul 2015-Jun 2016 vs Jul 2019-Jun 2020
- Making fibre claims tangible will create differentiation

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- Focus on fibre's gut health benefits
- Help consumers manage weight in a safe and healthy manner
- Proactively reduce sodium content of breakfast food

## **Make breakfast hassle-free and exciting**

- Help make breakfast easy and exciting
- Explore frozen food formats to deliver hot and fresh breakfast
- Enable customisation to offer variation
- Overnight oats are emerging in the Indian market
- Encourage children to help with breakfast preparations

## **Expand breakfast foods into new meal and usage occasions**

- Encourage consumers to have a healthy breakfast
- Breakfast brands can leverage the snackification trend
- Brands can repurpose portable on-the-go pack formats to position breakfast products as any-time snacks
- Position breakfast products as ingredients for meals and snacks
- Established breakfast brands can target small appetites with drinking formats

## **Global innovations**

- Breakfast bowls loaded with veggies and protein
- Brands look to build loyalty by encouraging a morning routine
- Protein forms the backbone of a healthy breakfast
- Gut health is trending
- Single-serve and convenient formats
- Cereals aimed at children highlight all-day energy
- Using colour and shape to bring innovative disruption in cereals
- Porridge that helps tackle bad breath

## **APPENDIX**

- Report definition
- Consumer survey methodology
- TURF statistical analysis

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- ✔ Understand the Indian market and see how it fits into wider trends on a local and global level.
- ✔ Take advantage of the gaps and opportunities that exist today, tomorrow and beyond.

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Segment consumers across India according to their regional and demographic differences so you can target them more effectively.

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