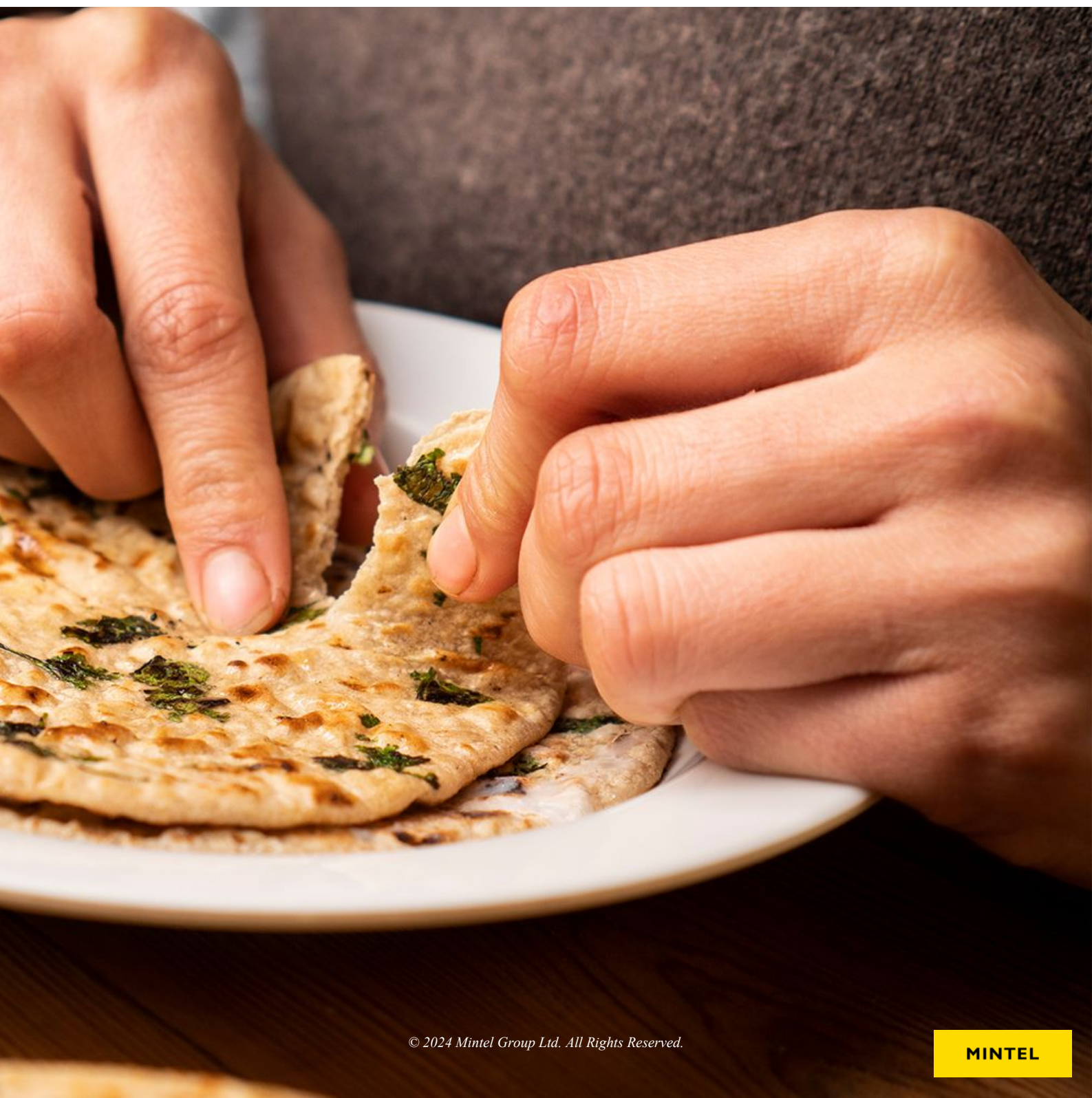


BREAKFAST FOODS – INDIAN CONSUMER – 2020

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.



Rushikesh Aravkar,
Associate Director -
Consumer Reports South
APAC - Food & Drink



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

- 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

Breakfast Foods – Indian Consumer – 2020

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

Breakfast Foods – Indian Consumer – 2020

- 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

Breakfast Foods – Indian Consumer – 2020

- 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

About Mintel India Consumer

Access our reports now and we'll tell you how major trends are affecting India. We also hone in on the regional differences from socio-economic groups to demographics such as age, gender and household composition. We research consumers in Metro and Tier 1 to 3 cities across the 4 main regions and in 6 local languages.

In each report, we're analysing the trends and the innovations, the behaviours and the influencers of consumers across India. Our local expert analysts then examining the primary research and consumer data and translating it into what it means for you.

- ✔ Find out what Indian consumers want, what they need and what influences their purchasing decisions.
- ✔ 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.

How Mintel Indian Consumer will help your business grow:

01

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

02

Analyse the latest trends and innovations and see how they fit at a local level to identify opportunities for your next big idea.

03

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US	+1 (312) 932 0600
Australia	+61 (0)2 8284 8100
China	+86 (21) 6386 6609
India	+91 22 4090 7217
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