

CHEESE AND PANEER – INDIAN CONSUMER – 2020

Growth opportunities for this popular category lie in innovation: new formats to increase consumption occasions and added hygiene and flavour in packaged paneer.



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Report Content

EXECUTIVE SUMMARY

- What you need to know
- Mintel's perspective

Market context

- The impact of COVID-19 on the cheese and paneer market
- Expanding consumption occasions is key to expanding the category
- Call out health benefits

What consumers want and why

- Increasing consumption frequency is key to long-term growth
 - Graph 1: cheese (processed) consumption frequency, by age, 2020
- South Indian consumers want: varieties of cheese
- Consumers want: healthy diets
- Parents want: flavourful options

Opportunities

- Increase consumption frequency with snackable formats
- Bring health messaging to the forefront
- Engage consumers with flavourful varieties

Competitive landscape

- Teach consumers ways to incorporate cheese in newer dishes
- Protein-packed paneer mentioned on pack

Mintel predicts

- Mintel predicts

THE IMPACT OF COVID-19 ON CHEESE AND PANEER

- The outlook for the Indian food and drink industry
- The outlook for cheese and paneer consumption
- Healthy eating is a key focus
 - Graph 2: higher priority to eating healthy, by age group, September 2020
- SWOT analysis: the impact of COVID-19 on cheese and paneer
- SWOT analysis: the impact of COVID-19 on cheese and paneer
- SWOT analysis: the impact of COVID-19 on cheese and paneer

- The marketing mix: product
- The marketing mix: product
- The marketing mix: place
- The marketing mix: price
- The marketing mix: promotion
- 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

- Mintel Trend Quality Redefined
- Mintel Trend Feed the Mind
- Mintel Trend Supernanny State
- Snacking and grazing emerge as contemporary usage occasions for cheese, something that is missing in India
 - Graph 3: percentage of processed cheese launches that claim 'snack' or 'snacking', 2016-20

Key drivers

- Indians have a positive perception about milk and milk products
 - Graph 4: top nutritional claims by cheese and paneer brands, 2018-20
- Protein is trending
- Added health features are most visible in processed cheese
 - Graph 5: cheese launches, by share of select 'plus' claims, 2015-20
- A flavour of cheese for every food
- Paneer, once alien to South India, is now accepted by consumers
- The rise and rise of artisanal cheese

CONSUMER INSIGHTS

- What you need to know

Consumption

- The key issue: high penetration, low frequency of consumption
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- Despite the high penetration of processed cheese, consumption is not a daily affair
 - Graph 6: frequency of consumption of processed cheese in the last six months, 2020
- Processed cheese is the most popular format in India
 - Graph 7: launches of cheese* by sub-category, 2017-20

Cheese and Paneer – Indian Consumer – 2020

- Who are the frequent users of processed cheese?
- Cater to snacking occasions for the working consumer to increase the frequency of consumption
 - Graph 8: cheese (processed) consumption frequency, by age, 2020
- Promote varied types of cheese owing to changing food habits, especially in South India
 - Graph 9: select types of cheese consumed, by region, 2020
- Leverage health to increase consumption among younger consumers
 - Graph 10: consumption of processed cheese at least once a day in the last six months, by age, 2020
- Respond to consumer demand for newer types of cheese
 - Graph 11: launches of cheese* by sub-category, 2019-20
 - Graph 12: NET consumption of cheese in the last six months, by type of cheese, 2020
- Do more with spreads and shredded cheese
 - Graph 13: consumption of select formats of cheese at home in the past six months, by age, 2020
 - Graph 14: launches of cheese*, by format type, 2019-20
- Give parents more information to explore different types of cheese
 - Graph 15: agreement with "There is little information out there about different types of cheese and how to use them", by parenthood status, 2020
- Who is the packaged paneer consumer?
- Packaged paneer can play the hygiene card to compete with local, freshly made competitors
 - Graph 16: consumption of types of paneer, by city tier, 2020
- Gap in the market with convenient, ready-to-use paneer formats

Health is the key

- A balanced diet is becoming increasingly important
- Clearly position protein and health benefits for men
 - Graph 17: neither agree nor disagree to select statements on cheese and paneer, by gender, 2020
- Address the fat content in cheese to overcome consumer concerns
 - Graph 18: select reasons for no/low consumption of cheese, by gender and age, 2020
- While taste is always important, protein and calcium drive consumption for older age groups
- While taste is always important, protein and calcium drive consumption for older age groups
 - Graph 19: factors driving cheese consumption, by age, 2020
- Highlight the protein benefit in paneer to make it a staple

What's missing

- Address price, flavour and freshness to increase consumption
 - Graph 20: select reasons for low/no consumption of cheese and paneer, 2020
- New flavours interest parents of gradeschoolers and teenagers
 - Graph 21: agreement with "There should be more flavours available in cheese", by parenthood status and child's age, 2020
- Leverage consumer spending power in metros and Tier 1 cities

- Graph 22: select cheese consumption, by city tier, 2020
- Use on-pack freshness and hygiene cues to compete with unpackaged offerings
 - Graph 23: NET any rank of the importance of the following on-pack information when shopping for packaged food, 2020

MARKET APPLICATIONS

- What you need to know

Snackable formats

- Target snacking by going small
- Include engaging formats like bites, bars and dips
- Create on-the-go, high-protein snacks
- Emphasise indulgence in adult snacks
- Take inspiration from other Asian countries to deliver nutritious snackables

Health and nutrition

- Keep up with consumers' evolving definition of better-for-you foods
 - Graph 24: top five health-related claims on cheese and paneer launches, 2018-20
 - Graph 25: top five health-related claims on cheese and paneer launches, 2018-20
- Bring nutritional takeaways to the front of the pack
- Address the fat content of cheese
- Free-from claims to help consumers live with and manage chronic diseases
- Cheese can help consumers to meet their dietary needs
- Cheese can play as a meat replacement
- Case study: Pieminister (UK) – have a presence on meat-free platforms

Flavours

- Make cheese fun with new flavours
- Increase the value of cheese with added herbs and claims
- Case study: Philadelphia introduces intense flavours
- For paneer, draw a parallel from existing cheese flavours in India to provide convenient ready-to-cook marinated paneer
- Case study: SĀCH Foods
- Help consumers create experiences at home

APPENDIX

- Report definition
- Abbreviations
- Consumer survey methodology

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- ✓ 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.

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02

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03

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