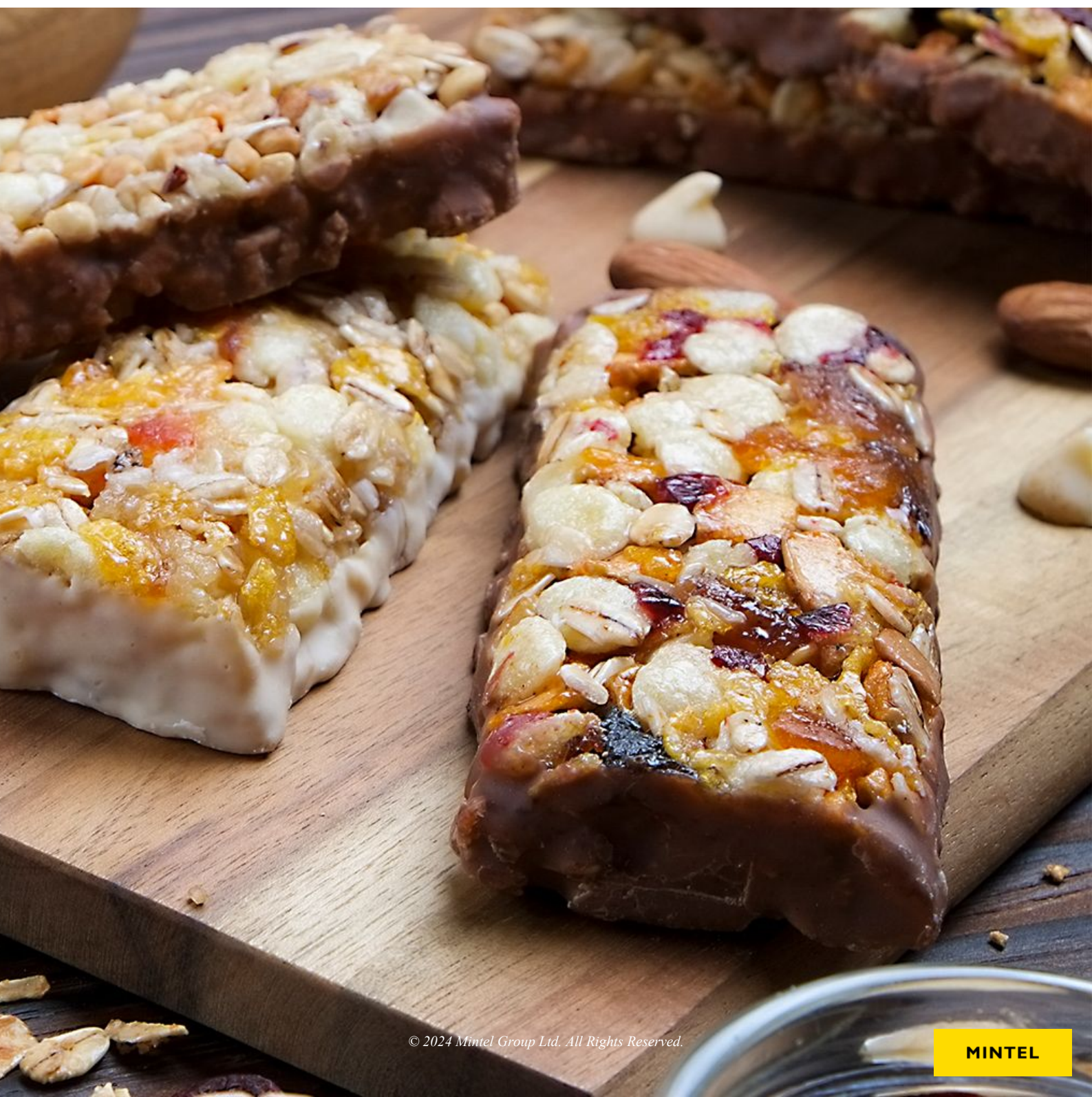


ENERGY & SNACK BARS – INDIAN CONSUMER – 2021

Health credentials are the key consumption driver in this category, but brands can expand by offering permissible indulgence that caters to people's emotional needs



Tulsi Joshi, Senior Food &
Drink Analyst, India



Report Content



EXECUTIVE SUMMARY

- What you need to know
- Mintel's perspective

Market context

- Stress in the city: modern lifestyles take a toll on mental health
 - Graph 1: % top five key reasons for stress, by metro city tier, May 2020
- Rising holistic approaches to achieving health and wellness goals
 - Graph 2: "What are the main steps you take to live/maintain a healthy lifestyle?", July 2020
- Impact of COVID-19 on snacking and snack bars
- Omnichannel presence brings forth expansion opportunities

What consumers want

- Consumers want: health and immunity
- Consumers want: comfort snacking
- Consumers want: flavours and indulgent experiences

Opportunities

- Focus on specific health benefits
- Address stress snacking and promote mental wellness benefits
- The B.T.R. Bar range infuses superfoods with adaptogens
- Offer flavours and different textures for experimental snackers

Competitive landscape

- Snack bar brands are competing with other snacking categories to gain consumer preference

Mintel predicts

- Mintel predicts – summary

IMPACT OF COVID-19 ON ENERGY AND SNACK BARS

- The outlook for the Indian food and drink industry
- The outlook for the Indian snack bar category
- COVID-19 shakes up consumption trends with snacking
- Rise of metro dwellers seeking online consultations for mental health
- Addressing mental health during COVID-19
- SWOT analysis: the impact of COVID-19 on snack bars

Energy & Snack Bars – Indian Consumer – 2021

- The marketing mix: product
- HerbChick introduces the first protein chicken bar
- The marketing mix: price
- The marketing mix: place
- 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

- Modern lifestyles give rise to 'snackification'
- Increased emphasis on 'mindful snacking'
- Everyday moments of joy by Kashi
- Digital transformation and going D2C are growth accelerators

Key drivers

- Taste – the most important driving factor
- Growing awareness of foods effect on mood
- Lifestyle diseases drive Indians to become more health-conscious
- Rise of diabetics and growing need for diabetic friendly snacking

CONSUMER INSIGHTS

- What you need to know

Who are snack bar consumers?

- Consumer profiles: Conventionalists, Explorers and Enthusiasts
- Explorers make up the biggest consumer profile
- High penetration in metros; other tiers showcase promising growth
 - Graph 3: % of snack bar purchaser type, by city tier, December 2020
- Experimental snack bar purchasers are frequent snackers
 - Graph 4: % of snack bar purchaser type, by snacker type, December 2020

What do these consumers want?

- Consumers want taste, health benefits and protein content in their snack bars
- Conventionalists: focus on taste and indulgence, add functional benefit claims
- Explorers: balance taste and health benefits, amplify protein and fibre content
- Enthusiasts: raise the bar with intense focus on health benefits

Emotional side of snacking

- 'Snacking therapy'
- Emotional needs drive snacking consumption
 - Graph 5: attitudes towards snacking, December 2020
- Consumers seek ingredients that help with mental wellbeing

Blurring the line between snack bars and chocolate bars

- Snickers positions itself as a 'snack time' bar
- Strong association of chocolate with indulgence
- Snack bars considered a healthier alternative to chocolate

Savoury snacking nation

- Savoury preferred over sweet when it comes snacking
 - Graph 6: "Who have you bought each of the following snacks for in the past 6 months?", December 2020
- Consumers want healthy, on-the-go, hassle-free snacking
- Target health-conscious snackers with savoury snack bars
- Global inspiration: Hiya snack launches Indian-inspired snack bar flavours
- Balance spices and add veggies to amp up taste and wholesome appeal
 - Graph 7: % of snack bar launches with vegetables as an ingredient, January 2016–December 2020
- Target diabetics and health-conscious consumers with nutrient-dense, portion-controlled, diabetic-friendly savoury bars

Tap into the children's snacking segment

- Child's play
- Indian parents seek nutrient-dense, portion-controlled, convenient snacking
- Consumer insight : summary

MARKET APPLICATIONS

- Key areas to focus on
- Customise targeting in accordance to the consumer profile
- Tailored approach for each consumer segment

Drive consumption by channeling consumers' emotional needs for snacking

- Communicate guilt-free indulgence with health appeal
- Hype the ingredients that help with mental wellness
- myAir introduces personalised nutrition bars for stress relief
- Mood Snack Box by Monarch Airlines helps calm nervous fliers
- Introduce different formats for at-home consumption

Expand the category with savoury flavours

- Appeal to savoury snackers to widen consumer base
- Introduce savoury palate with popular, well-accepted flavours
- Target diabetics and health-conscious consumers with savoury snack bars

Address the need gap of healthy and tasty children's snacking

- Indian startup brands launch snack bars for children
- Appeal to parents with fortified vitamins/minerals, memory and eye health
 - Graph 8: leading health claims, % of all food launches with children (5-12years) claim, February 2016–January 2021
- Focus on memory support, immunity and eye health for children's snack bars
- Appeal to kids with chewy, chunky texture with attractive packaging
- Experiment with fun and popular flavours to drive consumption amongst children

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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.

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