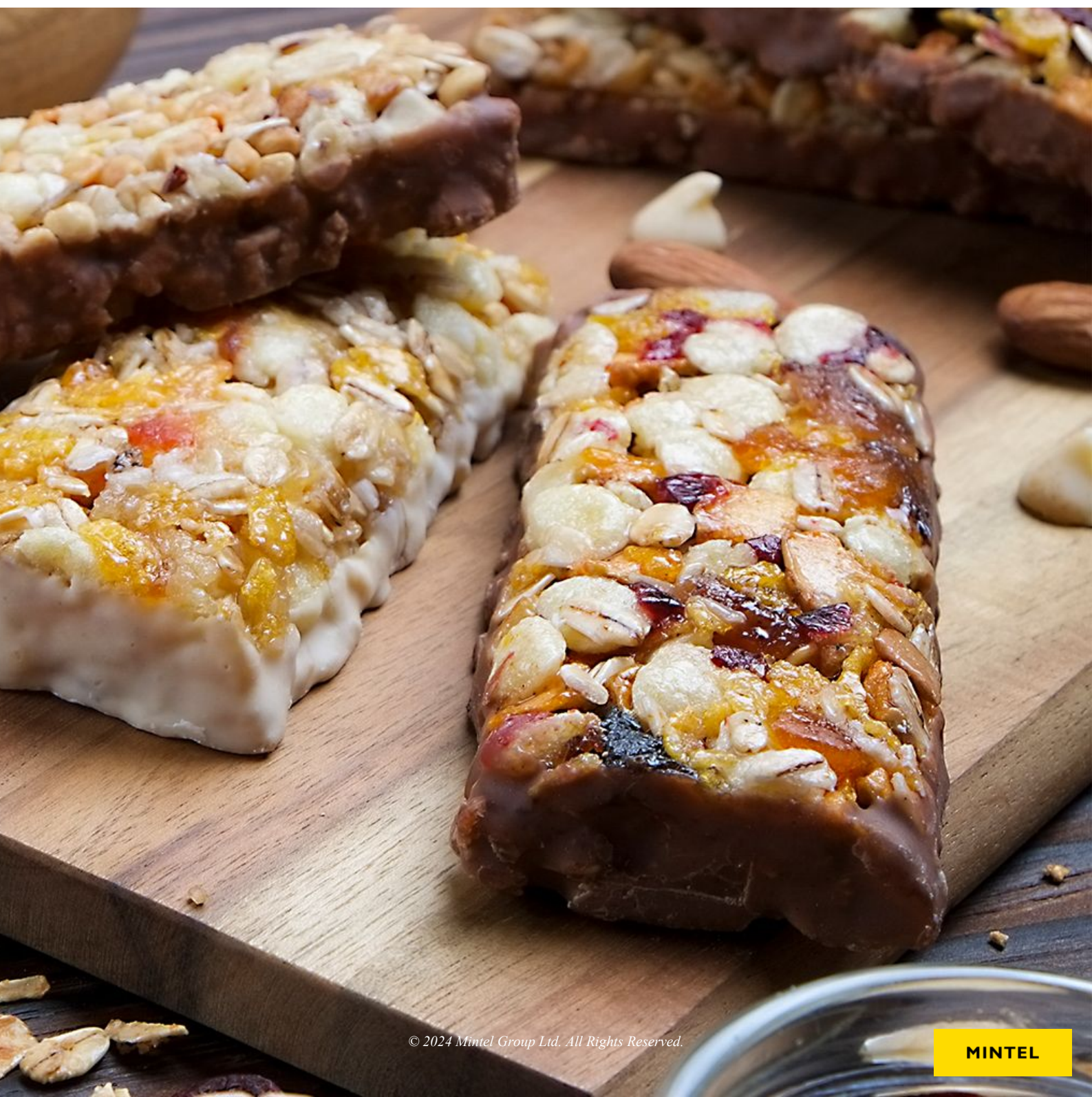


# ENERGY & SNACK BARS – INDIAN CONSUMER – 2021

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



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# 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

- 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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