

# FROZEN SNACKS AND MEALS – INDIAN CONSUMER – 2022

Affordability, health and clean/natural recipes are key themes for market expansion. Opportunity exists to enter categories beyond ready-to-fry snacking.



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# Frozen Snacks And Meals – Indian Consumer – 2022

## This report looks at the following areas:

- Frozen food format types purchased
- Purchasing motivators for frozen food consumers
- Barrier-causing factors among frozen food non-purchasers
- Three key trends in the frozen foods category
- Key target segments – who are they and what are the best routes to appeal to them?
- Opportunities to expand market reach with product innovation



Affordability, health and clean/natural recipes are key themes for market expansion. Opportunity exists to enter categories beyond ready-to-fry snacking.

## Overview

Rapid urbanisation and high economic growth over the last decade is changing consumer preferences. High-stress jobs and more women joining the workforce are making consumers more pressed for time, and they are starting to appreciate the time-saving benefits offered by packaged foods, which are seeing growing acceptance. Refrigerator penetration across the country has grown from 18.8% in 2012 to 37.9% in 2021. Unsurprisingly, penetration is much greater in urban areas, at 63.4% in 2021. Frozen food popularity is being driven by demographic trends in India as convenience becomes a key factor in home cooking, particularly in growing urban areas.

Affordability, accessibility and consumer perception of frozen foods as unhealthy and loaded with preservatives are some of the key barriers for frozen foods to expand their reach in India.

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However, with the growth in hybrid work culture, India's time-poor consumers are steadily warming up to frozen foods. As a result, frozen foods are showing slow and steady growth.

This report expands on the current opportunities that frozen food brands can tap into, to expand their reach among non-purchasers. It identifies the core target demographics, where the focus is on increasing frozen foods' consumption frequency.

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# Report Content



## EXECUTIVE SUMMARY

- A note on referencing frozen foods in this Report
- Mintel's perspective

### Key issues covered in this Report

- Overview
- Demand for convenience among time-poor Indians offers an optimistic trajectory for frozen foods
- Target younger Millennials with health-focused offerings in smaller, affordable packs
- SEC A Indians are variety seekers; offer restaurant-inspired varieties with naturalness and no nasties
  - Graph 1: repertoire of frozen foods purchased by consumers in the last three months, by socio-economic class, 2022
- Innovation can lead to market expansion; opportune time to introduce varieties beyond fried snacks
  - Graph 2: top five frozen foods of highest interest for purchase, 2022

### Mintel predicts

- The outlook for frozen snacks and meals in India
- The marketing mix
- The marketing mix
- Quick download resources

## KEY TRENDS

- What you need to know

### Increasing relevance of frozen foods among convenience seekers

- Hybrid work model creates demand for in-home meals
- Brands become convenience-focused with on-pack communication
- Frozen food shows steady progress in India
  - Graph 3: food launches in frozen format, 2017-22
- FMCG brands are beginning to warm up the frozen foods category
- Government undertakes steps to develop robust cold-chain facilities across India
- Evolution of modern retail chains and ecommerce give impetus to frozen foods
- Booming ecommerce gives impetus to frozen foods

### Consumers increasingly desire to be in control

- Indians are highly anxious about their health and finances amid looming economic uncertainty
  - Graph 4: top five most worrisome factors, 2022

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- Consumers are making health-conscious purchase decisions
- Beyond health, consumers are motivated by naturalness, no nasties and clean labelling in frozen foods

### **Surging price sensitivity amid inflation**

- Indians are going into saving mode
- Frozen foods can prosper amidst inflation
- Brands target the budget-conscious consumer by introducing smaller packs
- Value deals are on the rise

## **CONSUMER INSIGHTS**

- What you need to know
- Potato-based snacks are the most popular frozen foods
  - Graph 5: types of packaged frozen snacks and meals purchased for own consumption in the last three months, 2022
- Make nuggets and patties Gen Z-friendly
  - Graph 6: select types of frozen snacks and/or meals purchased in the last three months, by generations, 2022
- Appeal to younger consumers with flavour varieties in momos/dim sum
  - Graph 7: % of consumers who purchased frozen momos/dim sum in the last three months, by age, 2022
- Unlock potential by targeting working women with frozen rotis/parathas

### **Barriers to purchasing frozen snacks and meals**

- Need of the hour: amplify frozen foods' convenience and health appeal
  - Graph 8: agreement with select statements, % of consumers, 2022
- Unaffordability coupled with concerns around calories and artificial ingredients hinder the growth of frozen foods
  - Graph 9: reasons for not purchasing frozen snacks and/or meals, 2022
- Key pillars to increasing market reach: value-for-money proposition, health offerings and clean label recipes
- Win over non-purchasers by replicating the taste of freshly made foods

### **Target convenience-seeking, time-poor younger Millennials with frozen food offerings**

- Younger Millennials are a key demographic for market expansion
- Younger Millennials are a key demographic for market expansion
- Educate younger Millennials on frozen food's nutrient-retaining capabilities
  - Graph 10: % of consumers who agree that ready to eat/cook meals and/or snacks are healthier than the frozen, by generation, 2022
- Online purchase channels are younger Millennials' route to discover new varieties
  - Graph 11: % of consumers who agree that shopping online helps me discover new variety of frozen food products, by generation, 2022

### **Factors motivating younger Millennials to eat more frozen foods**

- Maximise reach by offering healthy variants in small packs

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- Maximise reach by offering healthy variants in customisable small packs
- Drive holistic wellness appeal to motivate younger Millennials
- On-pack product information can trigger purchase among younger Millennials
  - Graph 12: % of consumers who select 'product information on the pack' as a motivating factor for purchasing frozen snacks and/or meals in the last three months, by generation, 2022
- Introduce pocket-friendly smaller packs
  - Graph 13: % of consumers who select 'small package size' as a motivating factor for purchasing frozen snacks and/or meals in the last three months, by generation and gender, 2022

### Make frozen foods appealing for SEC A consumers

- SEC A Indians are variety seekers
  - Graph 14: repertoire of frozen foods purchased by consumers in the last three months, socio-economic class, 2021
- Beyond snacking, offer affluent Indians frozen varieties in desserts, bakery and meals
  - Graph 15: interest in frozen products, by socio-economic class, 2022
- Emphasise 'no nasties' claims to appeal to SEC A non-purchasers
- Emphasise 'no nasties' claims to attract SEC A non-purchasers
- Unlock the potential of natural and clean recipes
  - Graph 16: % of consumers who select 'made from natural ingredients' as a motivating factor for purchasing frozen snacks and/or meals in the last three months, by socio-economic class, 2022
- Harness demand for at-home restaurant-style experiences among SEC A consumers
  - Graph 17: % of consumers interested in buying 'restaurant-inspired food meals' in frozen format, by socio-economic class, 2022

### Expansion opportunities for frozen foods

- Expansion opportunity lies beyond ready-to-fry potato-based snacks
- White space opportunity to enter breakfast, dessert, bakery and meal categories
  - Graph 18: frozen food launches, by category, 2017-22
  - Graph 19: top five frozen format foods of highest interest, 2022
- Strike a chord with convenience-seeking, time-poor consumers with frozen traditional breakfast offerings
- Entice experimental younger consumers by introducing international-inspired bakery varieties in frozen formats
  - Graph 20: % of consumers interested in buying 'bakery' in frozen format, by age, 2022

## MARKET APPLICATIONS

- Opportunities: key areas of focus

### Motivate younger Millennials with affordable, convenient and healthy offerings

- Frozen foods are missing on the health angle, but 'minus' health claims show slow but steady growth
  - Graph 21: select health claims carried by frozen foods launches, 2017-22
  - Graph 22: % of frozen food launches carrying select health claims, 2019-22

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- Target younger Millennials with holistic wellbeing benefits
- Underscore frozen foods' nutrient- and taste-retaining capabilities
- Communicate value for money with smaller, pocket-friendly packs
- Leverage demand for convenience among younger men
- Make frozen foods more accessible by exploring offbeat routes to market

### **Appeal to SEC A with natural and clean recipes**

- There exists an opportunity to emphasise removing nasties
  - Graph 23: select natural claims in frozen foods, 2019-22
- Build trust by consistently showcasing transparency at every step of the process
- Break purchase barriers by introducing products made from natural ingredients
  - Graph 24: select natural ingredient claims in frozen foods, 2019-22
- Take the naturalness route
- Offer a restaurant-style meal experience at home

### **Innovate to enter different consumption occasions**

- Recruit Gen Z by offering heat-and-eat nuggets and patties
- Bedeker expands its regional-inspired frozen range for various consumption occasions
- White space opportunity for traditional breakfast occasions
- Explore Western breakfast options for experimentalists
- Explore Indian mithais in frozen format
- Offer frozen international desserts in single-serve packs
- Single-serve waffles can offer affordable indulgence at home
- Showcase superior indulgence of heat-and-eat frozen bakery, against its packaged shelf-stable counterparts
- Harness demand for bake-at-home products

## **APPENDIX**

- Report definition
- Consumer survey methodology
- TURF methodology

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