

NOODLES – INDIAN CONSUMER – 2019

Increase consumption by tapping breakfast. Leverage the snacking occasion through a more diverse portfolio. Add healthier ingredients to improve perception.



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Report Content

EXECUTIVE SUMMARY

- What you need to know
- Maximise potential through healthier ingredients and a diverse portfolio
- New occasions can increase per capita consumption
 - Graph 1: Per capita consumption of instant noodles, 2017
- Maggi scandal will pave the way for clean label
- Moving towards healthy noodles
- Different options have occupied different spaces
- Innovate to make noodles a healthier option
- Increase per capita consumption through more eating occasions
- What this means

KEY TRENDS

- What you need to know

Key drivers

- Demand for noodles is on the rise
 - Graph 2: Demand for instant noodles, 2013-17
- Innovate towards healthiness
- Position instant noodles as a convenient solution for single-person households
- Category blurring between snacks and meals
 - Graph 3: Snacking frequency in a day, February 2018

Global trends and how they are playing out in India

- Elevated Convenience
- Examples of elevated convenience

CONSUMER INSIGHTS

- What you need to know

Expand consumption occasions

- Explore the breakfast occasion
 - Graph 4: Consumption of instant noodles by occasion in the past three months, August 2018
- Initiate younger consumers into the breakfast occasion

Noodles – Indian Consumer – 2019

- Maggi communicates the quality of ingredients
- Play up the convenience benefit of instant noodles
 - Graph 5: Top attributes associated with instant noodles by consumers aged 18–34 years, August 2018
- Position noodles as a snack in lower tier cities
 - Graph 6: Consumption of noodles at different occasions by city tier, August 2018
- Introduce snacking cues to noodles
 - Graph 7: Select attributes associated with salty snacks by city tier, August 2018
- Target specific regions based on preferred consumption occasion
 - Graph 8: Occasions of consumption of instant noodles by region, August 2018

Introduce additional benefits

- Induce trial through more flavours
 - Graph 9: New flavours as a purchase driver by age group
- Go beyond masala flavour
 - Graph 10: Top growing flavours in instant noodles, 2016–18
- Take note of interesting global flavours
- Apart from new flavours, Indian consumers want added vegetables
 - Graph 11: Features in instant noodles willing to pay more for, August 2018
- Introduce added vegetables to appeal to more consumers
- TURF analysis reveals the mix of attributes that will attract the largest number of unique respondents
- TURF methodology
- Nudge lower tier consumers through added vegetables
- Traditional grains can be targeted to children as well
 - Graph 12: Traditional grains as a factor willing to pay more for, by age group of children in the household, August 2018

MARKET APPLICATION

- What you need to know
- Expand portfolio to cater to different occasions
- Cue the breakfast occasion through popular product combinations
- Bring added value to the bowl
- Provide customisable noodles through 'healthy sachets'

Who's innovating

- Interesting Indian launches

Global innovations

- Updated instant noodles and pot snacks give consumers healthy convenience
- Self-heating to provide fresh noodles

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