

PACKAGED SAUCES – INDIAN CONSUMER – 2018

Urban Indians are opening up to packaged value-added sauces, but need assurances of taste and quality.



Rushikesh Aravkar,
Associate Director –
Consumer Reports South
APAC – Food & Drink



Report Content

EXECUTIVE SUMMARY

- What you need to know – Summary
- Promote convenience, quality and added benefits to home cooks to boost use of packaged sauces
- Save urban Indians time and effort with cooking aids
- Position packaged cooking sauces as the solution to a lack of skill and recipe knowledge
- Show homemakers how packaged sauces can fit within their high standards of home cooking
- Encourage Indian consumers to trade up to value-added sauces with restaurant-style flavours at home
- What it means

KEY TRENDS

- What you need to know

Key drivers

- Cater to India's growing middle class and their demand for convenience
 - Graph 1: Per capita gross national disposable income (at current prices), 2011-12 to 2016-17
- Capitalise on awareness of new products by increasing accessibility
 - Graph 2: Future Group's expansion, 2017-18
- Call out taste authenticity in packaged cooking sauces to win over Indian home cooks
- Leverage growing interest in global cuisine to offer aids for cooking at home
 - Graph 3: Top most preferred cuisines, 2016
- Cooking sauces for specific international and regional cuisines are becoming popular in India

Global trends and how they are playing out in India

- Focus on provenance, production techniques for 'real' food experiences
- Authenticity cues are on the rise within packaged sauces
- Point to safety, transparency credentials on pack for sauces in India
- Opportunities for organic food amidst food safety concerns in India

CONSUMER INSIGHTS

- What you need to know

Value-added sauces are earning their place in Indian kitchens

- Urban Indians use of a variety of sauces for cooking
 - Graph 4: Packaged seasonings and sauces used in the past month, February 2018

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- Evolution of usage
- Push single-ingredient packaged sauce users to trade up to value-added products with samples, bundled offerings
 - Graph 5: Count of packaged ingredients/sauces used, February 2018
- Super users are the most engaged with value-added packaged cooking sauces, and not just basic ingredients
- Increase visibility of sauces through out-of-store channels, offer choice in pack sizes
- Multiple pack sizes to fit multiple budgets
- Point to the convenience packaged sauces can offer to cooking at home
 - Graph 6: 'Packaged cooking sauces are good for everyday meals', by household responsibilities, February 2018

The main challenger for packaged sauces is homemade

- Demonstrate the added value that packaged sauces can offer
 - Graph 7: Attitudes toward cooking sauces – Challenges, February 2018
- Be open about ingredient origin, hygiene to assure consumers of product safety
 - Graph 8: Attitudes favouring homemade cooking sauces, by age, February 2018
- Introduce organic cooking sauces for the safety-conscious urban Indian cook
- Remind consumers of the safety of packaged cooking sauces
 - Graph 9: Use of select packaged sauces, by food safety concerns, February 2018
- Address taste concerns by highlighting recipe authenticity to win over cooks with advanced skills
 - Graph 10: 'Homemade sauce tastes better than packaged sauce', by cooking skills, February 2018
- Give consumers the chance to sample value-added cooking sauces as proof of authentic taste

Make space for premium sauces

- Focus on distribution in Eastern India, leverage positive consumer sentiment towards packaged sauces
 - Graph 11: 'I rarely change the brand of packaged ingredients/sauces I use', by region, February
- Enhance packaged sauces' image with premium features
 - Graph 12: Reasons for using packaged cooking sauces, by cooking skills, February 2018
- Reach out to very advanced cooks through food blogs, social media to showcase premium sauces
 - Graph 13: Use of select cooking sauces, by all and very advanced skills, February 2018

MARKET APPLICATION

- Opportunities: key areas of focus

Opportunities

- Make 'natural' claims on sauces more specific to showcase transparency
 - Graph 14: Growth of select natural claims, sauces*, 2013-17
- Leverage organic credentials in to pave the way for premium sauces in India, from basic to value added
- Reduce salt, sugar content in sauces to make them better-for-you
- Take a stealth approach to ingredient reduction, but also highlight it after the fact
- Incorporate a range of vegetables and fruits in sauces to improve nutritional profile, cut food waste in India

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- Graph 15: Trying to eat more of select ingredients compared to 12 months ago, February 2018
- Opportunities to use fruits, vegetables in sauces in India for unique flavours

Who's innovating

- Expand India's food fortification success in salt to packaged sauces
- Enhance nutritional value of sauces with added vitamins
- Add appeal to table sauces with flavour combinations
- Shine a spotlight on regional delicacies, ingredients through packaged sauces

Global innovators

- Make cooking easy with flavour 'shots' format
- Play up authenticity by calling out homemade recipes, production methods
- Promote moderation as the key to healthy eating

APPENDIX

- Consumer survey methodology
- Definitions and terms

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