

PLANT-BASED FOODS – INDIAN CONSUMER – 2022

Opportunity lies in tapping into mainstream consumers' interest in healthy eating. The key is to focus on education, nutrition, sustainability and accessibility.



Tulsi Joshi, Senior Food & Drink Analyst, India



Plant-based Foods – Indian Consumer – 2022

This report looks at the following areas:

- Diverse dietary preferences of Indian consumers and their inclination to switch to a plant-based diet
- Key trends in the plant-based food and drinks category
- Consumer outlook towards plant-based food and drinks
- Target consumer segments and their key consumption drivers for plant-based food and drinks
- Interest levels of different demographics in select protein sources



Opportunity lies in tapping into mainstream consumers' interest in healthy eating. The key is to focus on education, nutrition, sustainability and accessibility.

Overview

Globally, the plant-based trend is booming. In India, it is still in its early stages, with less than 1% of total food and drinks launches in the last five years having a 'plant-based' claim on pack.

India is a unique and challenging market for plant-based brands; it has the [world's largest vegetarian population](#), with the world's lowest per capita meat consumption. To top that off, diverse dietary preferences and habits and price-consciousness make it difficult for brands to capture the mass market in India. While these factors may seem like significant barriers to plant-based market expansion, the opportunity lies in consumers' burgeoning demand for health and wellness. Protein inadequacies also serve as a critical driver for plant-based consumption among Indian consumers.

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To go beyond the niche and serve the mass market, it is important for brands to educate consumers on what a plant-based diet is. Brands can explain the benefits of plant-based food on one's health and its positive impact on the planet's wellbeing.

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Report Content



EXECUTIVE SUMMARY

- What you need to know
- Mintel's perspective

Key issues covered in this Report

- Overview
- In this post-pandemic era, consumers' willingness to adopt a plant-based diet is surging
- Consumers' interest in plant-based food and drinks is on the rise
- Omnivores show signs of being the early adopters, while vegetarians are reluctant to switch to plant-based diets
 - Graph 1: interest in switching to a plant-based diet, total vs vegetarian and omnivore, 2022

What consumers want and why

- Younger consumers want to improve their physical health
 - Graph 2: % of consumers for whom 'improving overall physical health' is a very important motivating factor for consuming plant-based food and drinks, by gender and age, 2022
- Consumers want to increase their protein intake
- Consumers want to help the environment
 - Graph 3: % of consumers for whom 'helping the environment' is a very important motivating factor for consuming plant-based foods, by gender, age and socio-economic class, 2022

Opportunities

- Plant-based meat substitutes can boldly call out a 'plant-based' claim
- Boldly communicate health benefits on pack; focus on gut health and its role in providing holistic wellness
- Leverage demand for protein-dense food and drinks; strike a chord with familiar wholefood protein sources
 - Graph 4: protein sources of interest when consuming plant-based food/drinks, 2022
- Pea protein overtakes soy protein; familiar protein sources can make plant-based food and drinks more approachable to Indians
 - Graph 5: top two most used protein source in plant-based/vegan/dairy-free food and drink launches, 2019-22
- Beyond eco-friendly packaging, give consumers cues on how to be environmentally-friendly

The competitive landscape of plant-based food and drinks

- In the quest to 'healthify' food and drinks, brands are increasingly introducing plant-based variants
- Brands are lining up to milk the plant-based dairy opportunity

The impact of COVID-19 on plant-based food and drinks

- The outlook for the Indian plant-based food and drinks industry
- The marketing mix

- Mintel predicts

KEY TRENDS

- What you need to know

Rising adoption of preventive health measures

- Indians pursue preventive health measures in their quest to combat chronic disease
- Indians are switching to healthier choices in food and drinks
- Demand for healthier alternatives works in favour of plant-based food and drinks

Eco-conscious consumerism is on the rise

- Indians get environmentally friendly
- Rise in eco-conscious claims in India
 - Graph 6: top three ethical and environmental claims in food and drink, 2017-22
- ITC collaborates with IIT Delhi to accelerate India's journey toward achieving its sustainability goals

Price-consciousness surges amidst inflation

- Consumers tighten their purse strings as food and drink gets dearer
- Economic turmoil prompts anxious Indians to seek ways to be 'in control'
- Appeal to consumers' price-sensitivity with deals and offers

CONSUMER INSIGHTS

- What you need to know

Consumers' dietary preferences

- Vegetarians and meat eaters in India: a primer on dietary preferences
- Indian meat eaters and vegetarians sway towards plant-based diets
 - Graph 7: agreement with select dietary changes, "I would like to ...", by dietary preferences, 2022
- Four in 10 non-vegetarians in India are omnivores
 - Graph 8: agreement with select dietary changes, "I would like to ...", omnivores vs flexitarians, 2022
- Target plant-based innovations at omnivores; empower flexitarians to limit meat consumption
- Demographic profile: omnivores
- Demographic profile: flexitarians
- Plant-based dairy can leverage vegetarians' inclination to limit dairy consumption
 - Graph 9: agreement with select dietary changes, "I would like to ...", total vs vegetarians, 2022
- Plant-based dairy can draw inspiration from the rise of A2 milk in India
- Drive trials and familiarise Indians with plant-based milk by being present in cafes/chai stalls and office canteens
- Eggetarians seek a convenient, tasty and vegetarian route to egg-like nutrition
 - Graph 10: agreement with select dietary changes, "I would like to ...", total vs eggetarians, 2022

What's driving the plant-based movement?

- Consumers want to adopt plant-based diets but lack the understanding to do so
- Beyond vegan, call out the 'plant-based' claim on the pack
- India is missing out on the importance of plant-based in meat alternatives
 - Graph 11: select claims in plant-based meat substitutes, 2019-21
- Consumer want: healthy me, healthy planet
 - Graph 12: 'very important' factors motivating consumers to eat plant-based foods, by age, 2022
- Focus on protein, weight management and food safety to encourage meat eaters to go plant-based
 - Graph 13: select motivating factors for consuming plant-based food and drinks, by meat eaters who want to switch to a completely plant diet, 2022
- Link protein to perceived health benefits
 - Graph 14: association of protein with health benefits, 2022
- Offer digestive benefits to omnivores through plant-based foods
- Showcase protein prowess to convince vegetarians to switch to plant-based alternatives
 - Graph 15: % of consumers who agree with the statement, "My diet doesn't fulfill my daily protein requirement", total vs vegetarian, 2022
- Plant-based brands can target the older generation with preventive health benefits
 - Graph 16: % consumers who eat non-vegetarian foods, 2022
 - Graph 17: % of consumers who agree with the statement, "Eating plant-based food can help reduce the risk of diseases", by generation, 2022
- Leverage the demand for preventive health benefits of plant-based foods
- Appeal to Older Millennial women with weight loss benefits
- Sustainability strikes a chord with vegetarians and vegans
 - Graph 18: % of consumers who selected 'to help the environment' as a very important motivating factor for consuming plant-based foods, by dietary preferences, 2022
- Focus on value-for-money to drive usage
- Target the experimental Millennials with the novelty factor
 - Graph 19: % of consumers who selected 'to try out new food innovations' as a very important motivating factor for consuming plant-based foods, by generation, 2022
- In summary: four-point agenda for the growth of plant-based foods in India

Protein sources of interest

- Focus on protein quality to counter animal-based protein
- Communicate the wholesome nutrition superiority of plant-based products
- Familiar protein sources can play a pivotal role in driving the consumption of plant-based food and drinks
 - Graph 20: % of consumer interest in protein sources for consuming plant-based food/drinks, 2022
- Indians seek whole food protein sources in plant-based food and drinks
 - Graph 21: top three protein sources, by interest in consuming in plant-based food/drink, 2022

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- Leverage the widespread popularity of nuts for market expansion
 - Graph 22: % of consumers who are interested in nuts as a protein source in plant-based food/drinks, by gender, age, region, city tier and employment and gender, 2022
- Fruit and vegetable content can make plant-based more approachable
- Protein derived from whole grains strikes a chord with working women
 - Graph 23: % of consumers who are interested in whole grains as protein source in plant-based food/drinks, 2022
- Soya can appeal to urban Millennials
 - Graph 24: % of consumers who are interested in soya as a protein source in plant-based food/drinks, by generation and city tier, 2022
- Pea protein overtakes soy protein; familiar protein sources can make plant-based food and drinks more approachable to Indians
 - Graph 25: top two most used protein source in plant-based/vegan/dairy-free food and drink launches, 2019-22

MARKET APPLICATIONS

- Opportunities: key areas of focus

Educate consumers on plant-based offerings

- Plant-based claims showcase a positive trajectory
 - Graph 26: % launches with select claims in food and drinks, 2018-22
- Indian plant-based brands Imagine Meats and Blue Tribe harness celebrity power to educate consumers on plant-based foods
- Show versatility that one product can cater to diverse consumers
- Educate consumers by providing them with the actual experience of plant-based foods
- Expand the market for plant-based food and drinks by partnering with popular cafes and restaurants
- Induce trials by offering plant-based products in familiar formats with popular street-style flavours
- Communicate the idea of 'no sacrificing' on taste, texture or experience when switching to a plant-based meat alternative

Make a bolder health appeal

- Snacks, nutrition supplements and dairy lead the plant-based wave in India
 - Graph 27: top five food and drink categories with vegan/plant-based/dairy-free claims, 2019-22
- Take cues from plant-based nutrition supplements to leverage the clean and natural halo
- Use plant-based claims to offer permissible indulgence in snacks
- Offer innovative, bite-size, snackable plant-based meat options
- Room to glorify functional health claims; weight and muscle gain, brain and nervous system functional claims gain momentum
 - Graph 28: top six functional claims with vegan, plant-based or dairy-free in food and drinks, 2019-22
- Pair micronutrients with functional health benefits
- Target Omnivores by making a gut-friendly appeal

- Matter of the heart

Hero the protein

- Cater to the growing demand for protein-rich food and drinks
 - Graph 29: % of food and drink launches with 'high/added protein', 2017-22
- Plant-based brands are dialling up their protein play
- Dial up protein play
- Target Millennials women by combining weight loss benefits with protein claims
- Lay emphasis on nut protein
- Target urban Millennial men with soy protein that supports muscle and strength gain
- Harness the popularity of fruit/veggies by combining other ingredients to make a 'complete' protein
- Harness the popularity of fruit/veggies
- Wicked Gud glorifies familiar wholefood protein sources
- Plant-based eggs have the opportunity to be positioned as a protein-rich breakfast

Add value with eco-conscious and ethical claims

- Ride on the trending ethical and environmental claims in plant-based food and drinks
 - Graph 30: top three growing claims in plant-based/vegan/dairy-free food and drink launches, 2019-22
 - Graph 31: top five ethical and environmental claims in plant based, vegan and dairy-free launches, 2019-22
- Indian plant-based brands are going green on social media platforms
- Urge consumers to make eco-friendly decisions and become a part of eco-friendly community
- Beyond environmental claims, communicate animal cruelty
- Food service brings cruelty-free discussion to the fore
- Make powerful campaigns that illustrate animal-cruelty and urge consumers to follow plant-based diets

APPENDIX

- Report definition
- Consumer survey methodology
- TURF methodology
- CHAID analysis

About Mintel India Consumer

Access our reports now and we'll tell you how major trends are affecting India. We also hone in on the regional differences from socio-economic groups to demographics such as age, gender and household composition. We research consumers in Metro and Tier 1 to 3 cities across the 4 main regions and in 6 local languages.

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.

How Mintel Indian Consumer will help your business grow:

01

Segment consumers across India according to their regional and demographic differences so you can target them more effectively.

02

Analyse the latest trends and innovations and see how they fit at a local level to identify opportunities for your next big idea.

03

See action-oriented summaries to understand an area quickly or investigate the data to get an in-depth understanding of your market.

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