

PROTEIN POWDERS AND MEAL REPLACEMENT DRINKS – INDIAN CONSUMER – 2024

Promote protein education and leverage familiar sourcing to expand market reach. Appeal to holistic wellness enthusiasts with multifunctional health benefits, and attract adventurous consumers with flavour innovation.



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Protein Powders And Meal Replacement Drinks – Indian Consumer – 2024

This report looks at the following areas:

- Types of food & drink consumed for protein intake
- Health benefits of interest in protein supplements and meal replacement drinks
- Flavours of interest in protein supplements and meal replacement drinks
- Key features influencing purchases of protein supplements and meal replacement drinks
- Market expansion potential for coffee-flavoured protein supplements in India
- Three key macro trends playing out in India's protein supplement and meal replacement drinks market



Promote protein education and leverage familiar sourcing to expand market reach. Appeal to holistic wellness enthusiasts with multifunctional health benefits, and attract adventurous consumers with flavour innovation.

Overview

India's nutritional landscape is experiencing a significant transformation. As a nation facing protein deficiency, there is a growing focus on protein, evident across consumers, brands and digital platforms.

However, educating the masses about its importance remains a challenge. While interest grows, protein supplements primarily target a niche market of affluent, younger consumers.

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This Report thus examines the evolving protein market, detailing how people obtain protein, and identifying familiar sources to broaden market reach.

While energy and protein content influence purchase, consumers are increasingly interested in specific health benefits from protein supplements and meal replacement drinks.

It also uncovers innovative flavours that appeal to adventurous consumers. Notably, it reveals an untapped opportunity for coffee-flavoured protein supplements in the Indian market.

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Report Content

EXECUTIVE SUMMARY

- Report definition
- Mintel's perspective

Key issues covered in this Report

- Overview
- Lack of protein education persists; opportunity exists to leverage familiar protein sources
- Drive protein education to expand market reach
- Offer multifunctional health benefits for the eye, gut and mind
- Go beyond energy; provide holistic wellbeing with multifunctional health claims
 - Graph 1: top three features considered when choosing protein supplement powder or meal replacement drink, 2024
- Appeal to novelty seekers with savoury, seasonal fruit flavours and chocolate combos
- Appeal to novelty seekers with savoury, seasonal fruit, chocolate combos
 - Graph 2: select features considered when choosing protein supplement/meal replacement drinks, 2024

Mintel predicts

- The outlook for protein powders and meal replacement drinks in India, 2024

KEY TRENDS

- What you need to know

Protein goes mainstream

- Protein is getting its due attention from consumers, brands and...
 - Graph 3: launches with a high/added protein claim in food & drink, 2019-24
 - Graph 4: respondents who select 'high protein content' as a top factor when shopping for food, 2023-24
- ...on online platforms
 - Graph 5: Google search featuring the term 'protein', interest over time, 2019-24
- Mainstream food & drink brands are adopting a pro-protein strategy
- Social media influencers are increasingly talking about protein sources

Rise of conscious consumerism and increasing FSSAI scrutiny

- Conscious consumers prioritise health and safety
- The 'Label Padhega India' initiative enhances awareness of the contents of packaged food & drink
- The government and regulators are gearing up to support consumer welfare

- India's overhauled health supplement regulatory environment demands quality and safety throughout the manufacturing and sales process
- FSSAI increases scrutiny on protein supplement powders over the use of harmful substances and the prevalence of misleading claims

Mindfulness about mental energy

- The meaning of a healthy lifestyle has evolved to include holistic wellbeing
 - Graph 6: factors associated with a healthy lifestyle, 2023
- Stressed Gen Zs are bringing mental wellness to the forefront
- Beyond stress relief, Indians also seek food & drink that can help enhance their brain power

WHAT CONSUMERS WANT AND WHY

- What you need to know
- The growing protein market offers potential for protein supplements

Protein perceptions

- Need for protein education persists, with vegetables considered to be the most popular protein source
 - Graph 7: food & drink products typically consumed for protein intake, 2024
- Men consume more non-vegetarian sources, while women rely on vegetarian sources for protein
 - Graph 8: food and drink products typically consumed for getting protein, by gender, 2024
- Indians continue to struggle with insufficient protein knowledge
- Protein supplements remain relatively niche, consumed primarily by the affluent, Gen Z, and in Northern and Western regions
 - Graph 9: respondents who typically consume protein supplement powders as a source of protein, by generation, region and socio-economic class, 2024
- Protein education can pave the way for protein supplements' wider market reach
 - Graph 10: repertoire of food & drink products typically consumed for protein intake, consumers vs non-consumers of protein supplement/meal replacement drinks, 2024
- Nudge consumers to actively think of protein in their diet
- Advocate for education on protein and its sources; debunk myths surrounding protein supplements
- Whey is the heavyweight, but casein, pea and rice protein show an optimistic growth trajectory
 - Graph 11: top three growing protein ingredients in protein supplements and meal replacements, 2021-24
 - Graph 12: top protein ingredients in protein supplements, 2021-24
- Ingredientscape of protein sources in India: diverse plant sources, collagen and casein are an emerging niche
- Interpreting the map
- Innovate with familiar plant-based, nut and seed, egg and casein protein sources
- Explore multi-component plant-based blends with pea
- Go nuts (and seeds)!

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- Capitalise on egg's positive health perception by introducing egg-white-albumen protein supplements
- Educate gym-goers and athletes on the benefits of casein protein, and optimal consumption occasions to maximise its effects

Purchase drivers

- Energy, protein content and micronutrient fortification are the top drivers for protein supplement and meal replacement drinks
 - Graph 13: top three features considered when choosing protein supplement powder or meal replacement drink, 2024
- Younger Millennials prioritise micronutrient fortification, while older Millennials and Gen X value high energy content
 - Graph 14: top three features considered when choosing protein supplement powder or meal replacement drink, by generation, 2024
- Ideating with Mintel Leap: product concepts for each generation using Mintel Leap
- Leverage consumers' demand for energy; target the masses with protein supplements
- Status quo: energy claims are mainstream, but in decline
 - Graph 15: total share of energy claims in nutritional & meal replacement drinks with a high-protein claim, 2021-24
 - Graph 16: nutritional & meal replacement drink launches with a protein claim, 2021-24
- Now: highlight the importance of vitality in achieving aspirational lifestyles
- Next: upgrade the energy game with sustainable energy that fights fatigue
- Status quo: no added sugar mainstreams, low/reduced sugar remains a white space
 - Graph 17: total share of select claims in nutritional & meal replacement drinks with protein claims, 2021-24
 - Graph 18: select claims in nutritional & meal replacement drinks with a high/added protein claim, 2021-24
- Offer lower-sugar variants to appeal to younger generations

Functional health benefits of interest

- Indians seek benefits for eyes, gut and mind
 - Graph 19: health benefits of interest in trying in protein supplements/meal replacement drinks, 2024
- Status quo: a range of functional health benefits are rising in protein supplements and meal replacement drinks
 - Graph 20: launches with functional claims in nutritional & meal replacement drinks with a high/added protein claim, 2021-24
- Unlock potential by offering functional eye, gut, mind and cognitive benefits
 - Graph 21: total share of functional claims in nutritional & meal drinks with a high/added protein claim, 2021-24
- White space opportunity for eye health support
 - Graph 22: consumer interest in trying protein supplements and meal replacement drinks with select health benefits, by city tier, 2024
 - Graph 23: total share of select claims in nutritional & meal replacement drinks with a high/added protein claim, 2021-24
- Fortify with vitamins/minerals to address demand for eye health support
- Expand market reach by addressing the need for gut health improvement among non-consumers

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- Graph 24: frequency of gastrointestinal/digestive health issues (eg acidity, bloating, constipation, gastric ulcer) in the last six months, protein supplement and meal replacement consumers vs non-consumers, 2021-24
- Graph 25: consumer interest in trying protein supplements/meal replacement drinks that 'improve gut health' , 2024
- Discussions about protein sources and gut health are becoming mainstream
- Go gut-friendly
- Focus on the gut-brain axis
- Graph 26: select health benefits of interest in protein supplements and meal replacement drinks, by respondents interested in trying protein supplements/meal replacement drinks for 'improving gut health', 2024
- Enhance holistic wellness with a focus on gut health and mental wellness
- Appeal to a quarter of consumers with multifunctional claims
- Multifunctional eye health, mental wellness and focus claims can help reach half of Indians
- Position protein supplements as a holistic wellness solution with multifunctional claims

Flavours of interest

- Demand exists for both classic and novel flavours
- Graph 27: select features considered when choosing protein supplement/meal replacement drinks, 2024
- Chocolate flavour reigns supreme, but niche coffee, vanilla and strawberry flavours enjoy notable momentum
- Graph 28: top five flavour launches in nutritional & meal replacement drinks with a protein claim, 2021-24
- Flavourscape of nutritional and meal replacement: offbeat fruity, dessert and nutty flavours are emerging
- Interpreting the map
- Savoury and seasonal fruits are top flavour innovations of interest for targeting novelty seekers, closely followed by chocolate and nut combos
- Graph 29: flavours innovations of interest in protein supplements/meal replacement drinks, by select consumer segment, 2024
- Take notes from global brands to diversify flavour offerings in desserts, chocolates and coffee
- Target senior citizens and Tier 1 city dwellers with seasonal fruit flavours
- Upgrade chocoholics with choco combos
- Graph 30: launches with chocolate flavour blend in nutritional & meal replacement drinks with a protein claim, 2021-24
- Appeal to experimental chocoholics with choco combos
- Play on consumer demand for savoury flavours; the time is ripe for non-sugary alternatives

Expand market reach by blurring the line between protein supplements and coffee

- The coffee cult continues to grow in India
- Graph 31: any type of coffee consumed in the last month, by age group, 2023
- Position coffee-flavoured protein supplements as a healthier alternative to traditional coffee made at home
- Opportunity to be a coffee replacement with a twist of protein
- Coffee can be a promising opportunity for protein supplement brands to enter the Indian RTD market
- New launch alert: Yogabar expands into RTD protein beverages

APPENDIX

- Report definition
- Consumer survey methodology
- TURF methodology
- Repertoire analysis
- Infegy Atlas – coverage

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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