PULSES, RICE AND ATTA – INDIAN CONSUMER – 2022

Branded staples are expected to deliver on quality, purity and hygiene, as consumers have to let go of the assurance they derive from physical touch and feel.

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Pulses, Rice And Atta - Indian Consumer - 2022

This report looks at the following areas:

- Grocery shopping trends
- The channels used to purchase kitchen staples, and the factors driving in-store and online grocery shopping
- Trends in the purchase of pre-packaged kitchen staples (rice, pulses, atta/flour, suji, poha): current purchase patterns and intention for purchase in the next 12 months
- Barriers that restrict the purchase of packaged staples among non-users
- Factors that can motivate future consumption and drive premiumisation of packaged staples
- Behaviours and attitudes towards pre-packaged staples

“Branded staples are expected to deliver on quality, purity and hygiene, as consumers have to let go of the assurance they derive from physical touch and feel.

Overview

Traditionally, consumers make a purchase after physically inspecting the grains for quality and purity. Being unable to do so with branded staples leaves them unsure and sceptical.

Having said that, purity, premium quality and hygiene are the top consumer expectations from pre-packaged/branded staples.

Pricing will be crucial as consumers will be on a tight budget even when shopping for non-discretionary groceries due to the growing inflation and the lingering effects of the pandemic.

There is apprehension about the freshness of packed staples among five out of 10 Indians, along with scepticism about their purity and processing, restrict purchase of packed staples among non-users.

An assurance of hygiene and quality, along with organic and unprocessed claims and special packaging features such as being resealable, can motivate purchase, while added nutrition can drive premiumisation.

Report Content

EXECUTIVE SUMMARY

- What you need to know
- Mintel's perspective

Key issues covered in this Report

- Overview

Market context

- India has a growing packaged food industry
- Availability of multiple platforms is making grocery shopping dynamic and interesting

  - Graph 1: use of shopping channels for grocery shopping, 2022
- Availability of multiple platforms is making grocery shopping dynamic and interesting

What consumers want and why

- Consumers want proof of quality

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  - Graph 4: agreement with the statement 'I am willing to pay more for staples with added nutrition (eg protein, vitamins/minerals)', by employment status of parent, 2022
- Consumers in metro areas and the Southern region want pre-packaged atta

  - Graph 5: purchase of pre-packaged atta, by region and city tier, 2022
- At least one in two consumers intend to buy pre-packaged staples in the next 12 months

  - Graph 6: intention of purchasing pre-packaged staples in the next 12 months, 2022

Opportunities

- Communicate quality and freshness more effectively
- Offer better-for-you versions of staples
- Spotlighting 'unprocessed' can help attract more consumers
- New packaging features could offer flexibility and convenience

Competitive landscape

- The branded staples is a crowded space with a mix of national and regional players
- KRBL leads the packaged rice segment in India

Mintel predicts

- The outlook for the pre-packed staples category in India
- The marketing mix
- Mintel predicts

KEY TRENDS

- Recovery from the pandemic is impacting consumers' value priorities

Value for money

- Growing inflation is a concern
- Rising cost of living puts a strain on finances

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  - Graph 8: agreement with selected attitudes related to grocery shopping, by parental status – presence of children of any age, 2022

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- Shopping guidance is also a form of convenience

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Value of quality and transparency

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- Mintel Trend: Prove It
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- Kitchen staples are predominantly purchased in-store
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  - Graph 18: repertoire of types of pre-packaged staples purchased, by socio-economic group, 2022
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  - Graph 28: selected barrier to purchase of pre-packaged staples – 'Pre-packaged staples are not easy to find near where I live and/or work', by socio-economic group, 2022

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- Offer versatility in packaging sizes
- Let the packaging offer more benefits
- Resealable packaging could offer more flexibility
- Freshness is a concern, especially for atta

MARKET APPLICATIONS

- Opportunities: key areas of focus

Showcase value through better-for-you products

- There is an opportunity to differentiate products using natural, health and nutritional claims
  - Graph 35: % launches of packaged rice, with select claims, 2019-22
  - Graph 36: % launches of packaged pulses, with select claims, 2019-22
- There is an opportunity to differentiate products using natural, health and nutritional claims
  - Graph 37: % of packaged atta launches, with select claims, 2019-22
- Offer multigrain with a twist
- Engage with consumers by offering flours with added value
- Talk about better health, nourishment and immunity
- Add-ons to enrich flour are likely to gain traction
- There is an opportunity to extend flour portfolios with non-wheat options
- Offer low-GI atta and rice to diabetics
- Provide consumers an opportunity to pick red and brown in packaged rice

- Infuse vitamins, minerals and plant extracts
- Extend multigrain to rice and pulses
- Unpolished can justify 'healthy' and 'natural'

Showcase value by proving and assuring of quality

- Make an impression of superior quality and safety
- Consumers need to be convinced about freshness
- Share the story of origins and cultivation
- Premiumise by offering a rustic charm
- Customise products to cater to the needs of different regions and cultures

Offer flexibility and convenience with improved packaging features

- Offer packaging that aids in measuring
- Help consumers with cooking instructions
- Add value by making packaging resealable
- Offer versatility in pack sizes

Global Inspirations

- Keep elevating convenience and value
- Let festivity inspire innovations for special occasions
- Consumers take note of ethical claims

APPENDIX

- Report definition
- Consumer survey methodology

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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