

READY MEALS – INDIAN CONSUMER – 2018

As convenience culture gains traction in urban India, there are opportunities to elevate ready meals from a 'back-up plan' to a premium, aspirational choice.



Saptarshi Banerjee,
Senior Research Analyst –
Lifestyle, India



Report Content

EXECUTIVE SUMMARY

- What you need to know – Summary
- Focus ready meals innovation to address urban Indian consumers' demand for fresh food made quickly
- Highlight time-saving aspects of ready meals to appeal to busy Indian consumers
- Play up affordability and preparation speed of ready meals vs ordering food online
- Highlight quick preparation, availability to encourage frequent purchase
- Showcase authenticity of ready meals in terms of taste and recipes for young people who live alone
- Call attention to better-for-you ingredients in ready meals to improve the category's health image
- What it means

KEY TRENDS

- What you need to know

Key drivers

- Position ready meals as quick and easy meal solutions for single-person households
- Single-person households in urban India comprise primarily young people
 - Graph 1: Profile of those who live alone vs all, February 2018
- Highlight convenience, affordability to aid the growth of ready meals
 - Graph 2: Year-on-year volume and value growth, ready meals, 2012-13 to 2015-16
- Ready-to-cook products hold potential as an alternative to ready-to-eat in India
- Growing investments in ready meals will drive accessibility, innovation and usage

Global trends and how they're playing out in India

- Use time-centric messaging to promote products and services, and make sure they deliver on their promises
- Leverage the time/speed claim as a consistent selling point for ready meals
 - Graph 3: Time/speed claim, meals and meal centres vs ready meals and meal kits*, 2012-17
- A few Indian brands are already highlighting prep time for ready-to-cook foods
- Improving cold chain infrastructure will drive the demand for fresh meals

CONSUMER INSIGHTS

- What you need to know

An acceptable alternative

- Opportunity to increase penetration of ready meals in Indian homes

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- Graph 4: 'Packaged ready meals are always in my cupboard', by select demographics, February 2018
- Show the amount of time saved when using a ready meal versus cooking from scratch
- Position ready meals as customisable 'helper' foods to those responsible for upkeep of the home
 - Graph 5: Agreement with 'packaged ready meals are good to use in place of a meal cooked from scratch', by home responsibilities, February 2018
- Promote premium meal kits as a replacement for restaurant food for a special occasion, and offer product variety to keep interest high
 - Graph 6: Agreement with 'packaged ready meals are good to use in place of a meal cooked from scratch', by women and moms' working status, February 2018
- Partner with Indian restaurant brands to highlight authentic taste and leverage premium positioning

Attitudes towards ready meals

- Promote ready meals as a convenient 'work meal' for full-time employees
 - Graph 7: 'Ready meals are good as a meal to eat at work', by working situation, February 2018
- Carve out quality time with the family through meal kits for snacking
 - Graph 8: 'Ready meals are a suitable snack', by household size, February 2018
- Target the East region for increasing ready meals distribution

Catering to the single lifestyle

- Help single consumers do away with leftovers with portioned and bundled ready meals
- Promote fresh, semi-fresh meals to singles with ingredient transparency to improve ready meal image
 - Graph 9: Select attitudes towards ready meals, by those living alone vs all, February 2018
- Ensure that ready meals are easy to find in order to increase usage among singles
 - Graph 10: 'Ready meals are easy to find in stores', by household group, February 2018
- Make ready meals healthier through the use of nutrient-dense ingredients and fortification
- Health has its place, but don't forget comfort and the familiar foods of home

MARKET APPLICATION

- Opportunities: Key areas of focus

Opportunities

- Address the gap for freshness in the ready meals space in India
 - Graph 11: Prepared meals and meal kits, by storage type, 2016-17
- Reinforce the idea of freshness in India with chilled products that have a short shelf life
- Freshness and ease of access can be a winning proposition for ready meals

Who's innovating

- Cater to the rapidly growing demand for convenient breakfasts
- Quick breakfasts are the next frontier for the ready-to-eat space in India

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- Leverage celebrity chefs, traditional recipes to highlight authentic Indian breakfasts
- Major food brands move into the ready breakfast space in India

Global innovators

- Play with packaging and links to global cuisine to increase interest in ready meals
- Look to Western markets for healthy and affordable ready meal concepts
- Meat-based healthy meals can also be affordable
- Take cues from other markets to position Indian ready meals

APPENDIX

- Consumer survey methodology
- Definitions and notes

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