

SALT & SUGAR REDUCTION – INDIAN CONSUMER – 2020

Develop a gradual plan for salt reduction, link sugar reduction with naturalness and inform and educate consumers on the benefits of sugar and salt reduction.



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Report Content



- What you need to know

EXECUTIVE SUMMARY

- Mintel's perspective
- Educate consumers about the health benefits of salt and sugar reduction
- As sodium reduction efforts gain momentum globally, India has some ground to cover
 - Graph 1: Average sodium (mg per 100g/ml) by select food and drink category, Mar 2017-Feb 2020
- India lags behind the global average sugar content in carbonated soft drinks, dessert/ice cream and juices categories
 - Graph 2: Average sugars (g per 100g/ml) in select food and drink categories, Mar 2017-Feb 2020
- Addressing the double burden of malnutrition
- What consumers want and why
- What this means

KEY TRENDS

- What you need to know

Global trends and how they are playing out in India

- Mintel Trend: Supernanny State
- Mintel Trend: Bannedwagon
- Lifestyle diseases are on the rise across the world

Key drivers

- Health is top of mind for Indians
- Salt and sugar reduction is a top priority for the regulator too
- Brands pledge to spreading healthier eating

CONSUMER INSIGHTS

- What you need to know
- Consumers are more worried about sugar content than salt content
 - Graph 3: Consumers trying to reduce the amount of salt and sugar they consume, by age group, Dec 2019

Attitudes to salt reduction

- Consumers from the South, metros and aged 35+ are most common salt avoiders
- Educate younger consumers on the importance of sodium reduction

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- Educate younger consumers on the importance of sodium reduction
 - Graph 4: Consumers trying to reduce their salt intake, by age group, Dec 2019
- Deploy different strategies for sodium limiters and carefree consumers
- Demand for low-sodium or alternatively salted products is higher among affluent consumers
 - Graph 5: Select attitudes and behaviours related to salt/sodium, by socio-economic class, Dec 2019
- Metro and Tier 1 city dwellers are potential targets for low/reduced salt food variants
- Metro and Tier 1 city dwellers are potential targets for low/reduced salt food variants
 - Graph 6: Interest in low/reduced salt snack foods, Dec 2019
- Build on rock salt's healthy image to bring about gradual sodium reduction

Attitudes to sugar reduction

- Proactive sugar reduction gains traction in 35+ age group
 - Graph 7: Percentage of consumers reducing sugar consumption, by age, Dec 2019
- Consumers do not want to compromise on taste, especially in indulgent categories
 - Graph 8: Interest in low/reduced sugar foods, Dec 2019
- Use sweetening ingredients with a familiar and "natural" or "unprocessed" image
- Mothers are more likely to be influenced by a "natural" proposition
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- CHAID Analysis – Indian mothers as potential target market

MARKET APPLICATIONS

- Opportunities: Key areas of focus

Opportunities

- Proactively reduce sodium even if recommendations are still voluntary
- Use on-pack communication to educate consumers on the benefits of sodium reduction
- Link heart health with sodium reduction
- Use rock salt as a base to introduce salt alternatives
- Progressive salt reduction will earn rewards in the long term
- Patent watch: Alternatives to table salt
- "No added sugar" claim has been growing in Indian food and drink launches
 - Graph 9: Percentage of food launches that feature select claims, Mar 2015-Feb 2020
 - Graph 10: percentage of drink launches that feature select claims, Mar 2015 - Feb 2020
- Low/no/reduced sugar claims are most common in juice drinks
 - Graph 11: Top 10 food and drink categories for low/no/reduced sugar claims, Mar 2017-Feb 2020
- Sugar is declining in product launches, while additive sweeteners and functional fibres see minor uptick
 - Graph 12: Percentage of food and drink launches that contain sugar/carb sweeteners, Mar 2015-Feb 2020
- Use natural sweeteners and natural sugar alcohols to leverage "no added sugar" claims

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- Natural low-calorie sweeteners will play a crucial role in future NPD
- Patent watch: researchers focus on stevia-based innovations
- Blend natural sweeteners with white sugar to reduce calories
- Patent watch: researchers look for alternative sweetness sources
- Reduce sugar with functional fibres, especially polydextrose and inulin
 - Graph 13: Types of functional fibre ingredients found in food and drink launches that contain functional fibres and carry a low/no/reduced sugar claim, Mar 2015-Feb 2020
- Transparency and clear communication on low sugar content are vital for products for children
- Innovate with "good sugars" to strike a balance of sweet and healthy
- Introduce thin versions of existing brands to deliver portion control in indulgent categories
- Use naturally sweet vegetables to reduce added sugar content

Global innovations

- Take naturalness in sugar replacers one step ahead by linking back to plant source
- Brands reformulate current ranges to low/no/reduced sugar versions
- Sugar reduction strategies implemented by juice and beverage mix brands
- Slow-straining method for sugar reduction
- Take inspiration from UK and Finland
- Natural coconut aminos can substitute sodium in Asian seasonings
- Globally, brands are adding reduced-sodium options to their portfolio
- Use umami or kokumi sensations to offset the lack of salt

APPENDIX

- 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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