

SALTY SNACKS FLAVOUR TRENDS – INDIAN CONSUMER – 2022

In this cluttered space, flavour innovation is key to stand out on the shelf as consumers seek adventure, elevated indulgence, nostalgia and wellbeing.



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Salty Snacks Flavour Trends – Indian Consumer – 2022

This report looks at the following areas:

- Consumers' flavour preferences in salty snacks across different generations
- Opportunities with flavours in different types of salty snack categories
- Key trends in salty snacks flavours and how that can drive future flavour innovations
- Flavour innovations in salty snacks to target experimental consumers and gain a competitive advantage over others
- Post-pandemic demand for intense indulgence in food and drink and how brands can address it with flavours in salty snacks



In this cluttered space, flavour innovation is key to stand out on the shelf as consumers seek adventure, elevated indulgence, nostalgia and wellbeing.

Overview

Salty snacks is a highly competitive category, with taste being the key purchase driver and Indian spices being the most preferred salty snack flavour. In spite of that, the salty snacks category is led by plain flavours in India, with 58% of total launches in salty snacks being in plain/salted flavour. This underscores the untapped opportunity of using flavours as a key differentiator to gain competitive advantage in this cluttered snacking market.

COVID-19 has magnified snacks' role as comfort food. Emotional triggers such as overcoming boredom, boosting mood, de-stressing and fulfilling the temporary need to escape reality are

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driving consumers towards more intense and indulgent flavours in salty snacks. Flavours can also add the much-needed touch of indulgence in 'better-for-you' salty snacks.

32% of Indians prefer trying the unfamiliar when indulging in salty snacking. Interest in adventurous flavours in salty snacks can drive purchase amongst these experimental consumers.

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Report Content



EXECUTIVE SUMMARY

- What you need to know
- Mintel's perspective

Key issues covered in this Report

Market context

- Overview
- Work from home encourages snack consumption amongst Indians
 - Graph 1: % of consumers who agree to the statement, "Working from home encourages me to snack more often than when working outside of the home", by age and employment and gender, 2021
- Wider repertoire of snacking occasions makes for a favourable ecosystem for flavour innovations
 - Graph 2: repertoire of snacks consumed in different part of the day, 2021

What consumers want and why

- Consumers seek emotional support from their snacking ritual
- Consumers want: intense flavour experiences
- Nearly one third of Indians prefer to indulge in unfamiliar flavours in salty snacks
- Make an impression with adventurous salty snack flavours
- Older consumers seek salty snacks that provide permissible indulgence
 - Graph 3: % of consumers who agree to the statement, "Salty snacks that are both healthy and indulgent appeal to me", by age, 2021

Opportunities

- Target older women with flavours and ingredients that offer mental wellness in salty snacks
 - Graph 4: % of consumers who are interested in ingredient flavours that offer mental wellness in salty snacks, by gender and age, 2021
- Innovate with ingredient flavours that promote mental wellness
- Promote permissible indulgence with flavours
- Drive excitement with intense flavours

The competitive landscape

- Intense competition and the short-lived first-mover advantage in salty snack flavours

The impact of COVID-19 on salty snack flavour trends

- The outlook for the Indian salty snack flavour trends
- The marketing mix

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- The marketing mix
- Mintel predicts

KEY TRENDS

- What you need to know

Derive inspiration from foodservice restaurants

- Evolution of restaurant-inspired flavours in salty snacks
- Journey of restaurant-inspired flavours in salty snack flavours
- Innovate restaurant-inspired flavours to gain first-mover advantage
- Explore co-branding opportunities to bring popular foodservice flavours into packaged salty snacks

Build on the flavour-mood association

- Leverage the 'food-and-mood' association with flavours
- Brands flavours to set the mood for cocooned at-home consumption
- Plug in aroma-enhanced nostalgia in salty snack flavours
- Indian brands go nostalgic

Rising influence of 'hallyu' culture in India

- K-boom in the pandemic
- Tap into the burgeoning K-wave
- Increasing K-wave influence on Indian food and drinks

CONSUMER INSIGHTS

- What you need to know

Create differentiation with flavours

- Flavour innovation is the key to create shelf differentiation in salty snacks
 - Graph 5: top flavour components in salty snacks, 2019-22
- Flavour exploration is important to Indian consumers; ecommerce can be an enabler
- Indians prioritise flavour over nutrition when choosing salty snacks
- Clear and relatable flavour descriptions can drive trials among the masses
- Address emotional triggers with flavours
 - Graph 6: select reasons for snack consumption in the last month, by gender, 2021
- Ingredients that offer emotional wellbeing can drive flavour innovations
- Indians get nostalgic in their search for the comfort of familiar
- Target affluent Indians with regional nostalgic flavours

Salty snack flavour preference

- Indian spices is the most popular salty snack flavour
 - Graph 7: top five (any ranking) preferred salty snack flavours , 2021
- Indians have diverse preferences in salty snack flavours
 - Graph 8: ranking of top five preferred flavours of salty snack consumers, 2021
- Explore wider market reach by building on flavour portfolio
- Target different generations in accordance to their preference
- Indian spices resonates with all generations, but slowly and steadily loses consumer interest as they age
 - Graph 9: % of consumers who selected 'Indian Spices' (any ranking) in their top five most preferred salty snacks flavours, by generations, 2021
- Make it spicy for Gen Z
 - Graph 10: most preferred salty snack flavours – ranked first, by age, 2021
- Younger Millennials like it cheesy
- Explore opportunities within hot and sweet flavour palates
- Target Gen X with herbs-flavoured salty snacks
- Targeted towards senior citizens, garlic flavour can add a twist to plain salty snacks
 - Graph 11: % of consumers who selected 'garlic' as their top five preferred flavour (any ranking) in salty snacks, by generation, 2021
- Sodium content poses a barrier for salty snacks consumption

Flavours for different types of salty snacks

- Chips is the undisputed leader in salty snacks
 - Graph 12: % of snack consumers, by salty snack types, 2021
- Opportunity exists beyond evening occasions for salty snacks
 - Graph 13: % of chips consumers, by snack occasions, 2021
- Potato chips lead the segment, but corn-based and vegetable chips show potential
 - Graph 14: % of chips consumers, by types of chips consumers, 2021
- Premiumise potato and banana chips with authentic regional flavours
 - Graph 15: % of potato and banana chips, by socio-economic class, 2022
- Go beyond plain, salt and pepper flavour in banana chips
- Vegetable chips: Target younger, working Millennials with better-for-you positioning
 - Graph 16: % of vegetable snack consumers, by age and employment and gender, 2021
- Give an extra spicy and tangy twist to corn-based chips
- Corn-based chips can ride on the pop culture trend with North Asian flavours
- Opportunity for snack mixes to target mid-morning occasions with permissible indulgence positioning
- Room to further regionalise and localise snack mixes
 - Graph 17: select interest in flavour innovations, by snack mixes consumers, 2021
- Makhana can leverage the demand for holistic wellness

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- Targeting weight watchers, Makhana can explore tea/coffee and fusion flavours
 - Graph 18: select interest in flavour innovations, by Makhana consumers, 2021
- Popcorn: slowdown in flavour launch activity creates room for innovation
 - Graph 19: top five emerging flavours in popcorn, 2017-21
- Popcorn brands can take inspiration from potato chips
- Premiumise popcorn with elevated indulgence
 - Graph 20: % of popcorn consumption, by socio-economic group and employment and gender, 2021

Target experimental consumers

- Target experimental consumers by feeding their mind
- Healthier versions of snacks appeal to the experimentalists
- Explore non-vegetarian flavours to cater to experimental East Indians
 - Graph 21: % of consumers who are interested in non-vegetarian flavours in salty snacks, by region and gender, 2021
- Target experimental women with North Asian flavours
 - Graph 22: % of consumers who are interested in trying Japanese and Korean flavours in salty snacks, by region and gender, 2021
- Unlock the power of LTFs with ecommerce push for experimental consumers

MARKET APPLICATIONS

- Opportunities: key areas of focus

Emerging flavours in different types of snacks

- Plain flavour dominates most of the snack types, followed by spicy palate flavours
- Cheese flavour is more notable in newer snack formats such as corn-based snacks and popcorns
- Sweet flavours garner attention from niche brands
 - Graph 23: fastest growing flavours* in salty snacks, 2019-21
- Give consumers the free will to add sweeter flavours in salty snacks
- Cream, chilli pepper and tangy are emerging potato snack flavours
 - Graph 24: top three emerging flavours in potato snacks, 2019-21
- Call out specific dishes instead of generic cuisines in potato snacks
- Beyond cheese and salsa, corn-based chips can target experimental consumers with Japanese and Korean flavours
- Use flavours to amplify Makhana's health quotient
 - Graph 25: % of Makhana/foxnuts launches with select flavours, 2019-21
- Make Makhana more desirable with flavours
- Explore the potential of Himalayan pink or rock salt as an alternative to salt reduction
- Popcorn brand can play up on indulgence with the help of flavours
- Excite consumers with offbeat flavours in vegetable snacks
- Use flavours to further enhance the taste of vegetable chips

- Cornitos veggie nachos heroes its veggies

Lay emphasis on regional and local flavours

- Kukuris glorifies its 'masala' flavour
- Expand on your 'masala' flavour portfolio
- Explore regional favourite flavours
- Address demand for street-style food for at-home consumption

Target experimentalists with offbeat flavours

- Encourage trial and consumption with on-pack flavour description
- Experiment with Korean flavours to leverage its global popularity
- Explore potential for Japanese flavours in salty snacks
- Target the Northeastern region with non-vegetarian flavours in salty snacks
- Fusion flavours can find their niche
- #Tagz target adults with its novel potato chips flavour

Address mental wellness with flavours

- Subtly communicate mental wellbeing cues
- Offer indulgence and mood boost with extra spicy flavours
- Undertake mental wellness initiatives
- Amplify the indulgence quotient with cheese flavour
- In wake of the pandemic, global snack brands go nostalgic
- Plug in pop culture references to induce nostalgia

APPENDIX

- Report definition
- Consumer survey methodology
- Appendix

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