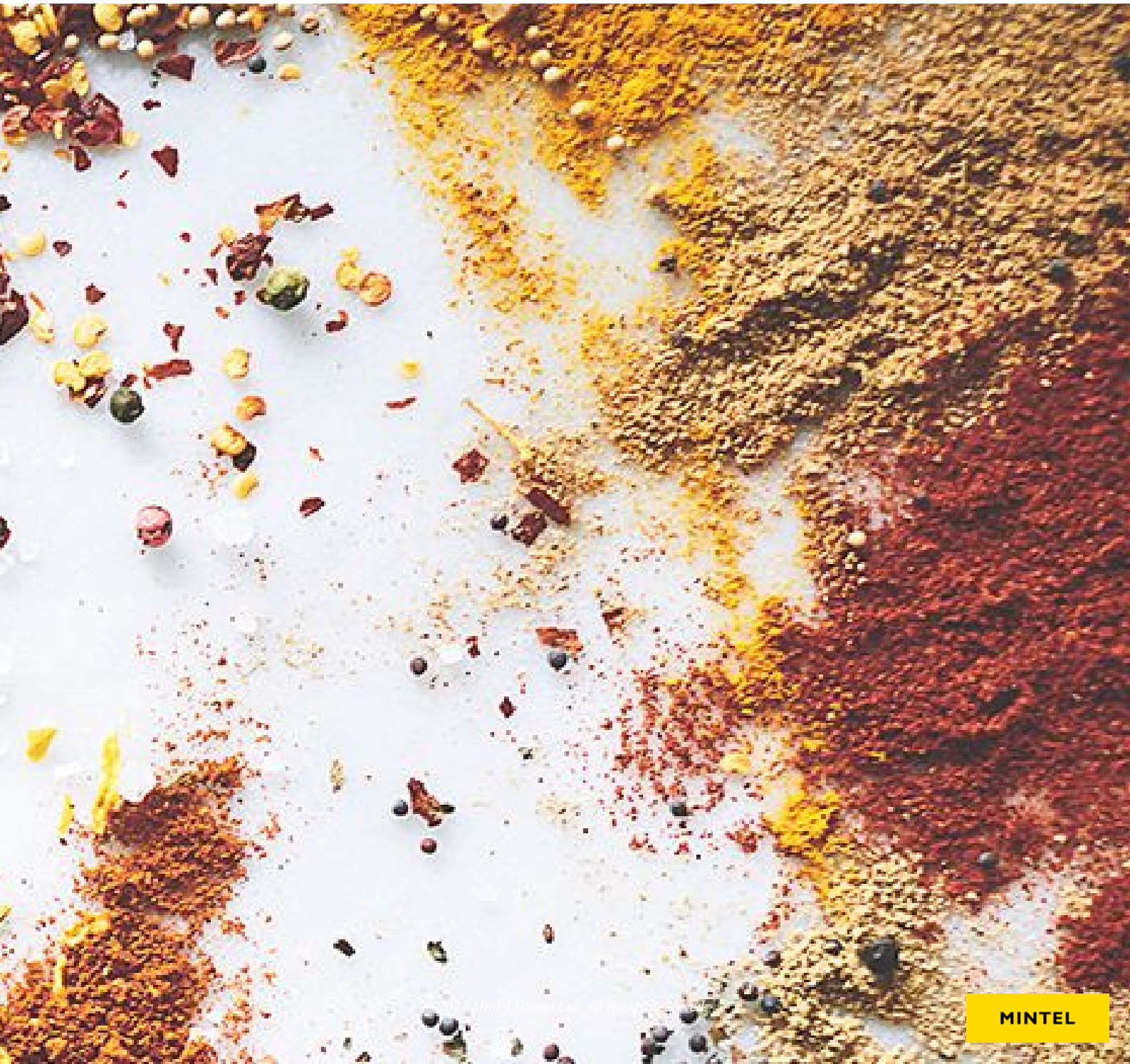


SPICES, MASALA MIXES AND SEASONINGS – INDIAN CONSUMER – 2022

Consumers seek regionalised recipes. It is important for brands to prioritise unpackaged buyers who intend to buy packaged formats. Give seasonings an Asian twist.



Tulsi Joshi, Senior Food & Drink Analyst, India



Spices, Masala Mixes And Seasonings – Indian Consumer – 2022

This report looks at the following areas:

- Current purchase behaviour and future purchase intention to buy unpackaged/packaged formats of spices, masala mixes and seasonings
- Top motivators to buy packaged spices, masala mixes and seasonings
- Three key trends shaping spices, masala mixes and seasonings
- Consumers' interest in the type of Indian cuisines to cook at home
- Consumers' attitudes towards functional food and drinks



Consumers seek regionalised recipes. It is important for brands to prioritise unpackaged buyers who intend to buy packaged formats. Give seasonings an Asian twist.

Overview

The spice market in India is dominated by the unorganised sector. Accessibility, affordability, consumers' long-standing habits and diversity of tastes in India are reasons why consumers continue to buy spices and masala mixes in unpackaged formats.

However, convenience, competitive pricing and rapid urbanisation has propelled consumers towards packaged formats of spices and masala mixes. This report explores expansion opportunities for packaged spices and masala mixes among Indian consumers.

With rapid urbanisation, consumers' demand for convenience has risen, and so has the demand for hygiene in a category like spices that experiences rampant adulteration. As a

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result, the future for packaged spices showcases optimistic trajectory. Expansion potential also exists for regional spice players to build a multistate or multinational play.

Seasonings, on the other hand, is western-inspired and came into play as the popularity of pizza and Italian cuisines grew in India. This report also spotlights the growth potential for seasonings.

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Report Content



EXECUTIVE SUMMARY

- A note on referencing Spices, Masala Mixes and Seasonings in this Report
- Mintel's perspective

Key issues covered in this Report

- Overview
- Divide and conquer India's spice and masala mixes market
- Prioritise Younger Millennials who intend to move from unpackaged to packaged formats
 - Graph 1: % of consumers who are currently purchasing unpackaged spices/masala mixes and intend to switch to packaged formats in the next 12 months, by generation, 2022
- Hyperlocal innovations can unlock potential
- Innovate seasonings for Chinese and Southeast Asian cuisines
 - Graph 2: top five factors (any ranking) considered when buying packaged seasonings, 2022

Mintel predicts

- The outlook for Spices, Masala Mixes and Seasonings in India
- Quick download resources

KEY TRENDS

- What you need to know

Authenticity is becoming the life of spice

- Consumers want 'the real thing'
- Regional flavours continue to rule the Indian food and drinks market
- Food and drink brands continue to focus on regional flavour innovations
- Consumers increasingly seek proof of authenticity
- Anveshan goes back to its roots to emphasise authenticity
- Deploy technology to prove authenticity
- Consolidation underway as FMCG biggies eye the packaged spices space

eCommerce is fuelling retail competition

- COVID-19 facilitates growth of ecommerce
- The rise of quick and effortless transactions
- The surge of private labels on ecommerce platforms
- Fiercer competition in staples with the entry of private labels into ecommerce platforms

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- Fresh Ground takes an e-route to provide freshness in spices
- Premium artisanal brands are making their presence known on online platforms

Intentional Spending

- Economic uncertainties prompt anxious Indians to be 'In Control'
- Consumers get 'intentional' about their spending with looming economic volatility
- Value deals are on the rise

WHAT CONSUMERS WANT AND WHY

- What you need to know

Consumption of spices and masala mixes

- Unpackaged single spices dominate the Indian market while packaged masala mixes have gained traction
 - Graph 3: current purchase of spices and masala mixes, 2022
- Four in 10 buyers of unpackaged formats intend to opt for packaged formats
- Divide and conquer the spices and masala mixes market
- PRIORITISE: Younger Millennials are more likely than others to make a switch from unpackaged to packaged formats
 - Graph 4: % of consumers who are currently purchasing unpackaged spices/masala mixes and intend to switch to packaged format in the next 12 months, by generation, 2022
- RETAIN: financially struggling consumers might move back to unpackaged formats
- UPGRADE: packaged loyalists of single spices are open to paying more for organic spices but are confused about what 'organic' is
 - Graph 5: % of consumers who agree with select statements, by consumers who currently buy packaged single spices and intend to buy the same format in the next 12 months, 2022
- Differentiate between natural and organic spices
- Set organic apart from natural; boast about features that mere natural spices cannot offer

Factors to increase spices and masala mixes consumption

- Regional varieties is a top draw for packaged spices and masala mixes
 - Graph 6: top five factors (any ranking) considered when buying packaged single spices by consumers who currently purchase packaged single spices or intend to purchase packaged single spices in the next 12 months, 2022
 - Graph 7: top five factors (any ranking) considered when buying packaged masala mixes by consumers who currently purchase packaged masala mixes or intend to purchase packaged masala mixes in the next 12 months, 2022
- Region-focused innovations can also help target consumers who intend to upgrade to packaged formats
 - Graph 8: % of consumers who consider 'regional varieties' when buying packaged single spices, by consumers who currently buy unpackaged formats and intend to buy packaged formats in the next 12 months, 2022
 - Graph 9: % of consumers who consider 'regional varieties' when buying packaged masala mixes, by consumers who currently buy unpackaged formats and intend to buy packaged formats in the next 12 months, 2022
- North Indian cuisine tops the popularity chart, followed by Gujarati and Tamil cuisines

Spices, Masala Mixes and Seasonings – Indian Consumer – 2022

- Graph 10: top five (ranking) Indian cuisines of interest to cook at home, 2022
- Introduce region-specific blends to achieve pan-India expansion
 - Graph 11: top five (any ranking) Indian cuisines of interest to cook at home, by region, 2022
- Cross-category inspiration: Ceres Foods introduces a range of hyperlocal variants
- Sawai Masala offers hyperlocal spices for Maharashtrian cuisine
- Create a portfolio of regional variants for different types of food formats
- Authentic taste can add value to drive single spice purchases among non-working women
 - Graph 12: % of consumers who selected 'authentic taste' as a consideration factor when purchasing packaged single spices, by gender and employment, 2022
- Communicate provenance to deliver authenticity
- Go bolder on origin story
- A strong aroma callout can drive purchases of packaged spices and masala mixes in Tier 3 towns
 - Graph 13: % of consumers who selected 'has strong aroma' as a consideration factor when purchasing single spices/masala mixes, by city tier
- Lay emphasis on aroma to expand reach in smaller towns
- Packaged spices and masala mixes is failing to prove its credibility
- Communicate ill effects of consuming adulterated spices
- Educate consumers on how to identify purity in spices and masala mixes
- Emphasise hygiene and purity to create differentiation between unpackaged and packaged spices
- Draw inspiration from staples to convince unpackaged users to try packaged ones
- Communicate flavour descriptions on pack to appeal to the Older Millennial female cohort
- Target metro dwellers by innovating single-sachet masala mixes that can be used as seasonings
 - Graph 14: % of consumers who agree with the statement "There are limited varieties available in single sachet masala mixes that can be used as a seasoning", by gender, age, city tier and current financial situation, 2022
- Venture into seasonings with single-sachet masala mixes
- Leverage the popularity of ecommerce channels in selling spices and masala mixes
- Take notes from DTC brands on how to represent authenticity on ecommerce platforms
- Leverage ecommerce to deliver customisation

Seasonings

- Packaged seasonings are consumed the most by affluent Older Millennial women
 - Graph 15: % of consumers who purchased seasonings in the last 12 months, by gender, age and socio-economic class, 2022
- Offer international varieties to drive consumption of seasonings among metro dwellers
 - Graph 16: % of consumers who agree with the statement "There are limited varieties of international flavour seasonings in the market", by city tier, 2022
- Innovate seasonings for Chinese and Southeast Asian cuisines
- Offer seasonings that can add a 'desi-chinese' twist to any meals

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- Look at offbeat Southeast Asian flavours to excite experimental consumers
- McCormick introduces its flavour of the year on the metaverse
- Take inspiration from mayonnaise brands to increase consumption frequency among infrequent consumers
- Play up for credible proof of purity in seasonings
 - Graph 17: top five factors (any ranking) considered when buying packaged seasonings, by consumers who currently purchase packaged seasonings or intend to purchase packaged seasonings in the next 12 months, 2022
- Spotlight on processing techniques

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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