



STTEM

Safety Technology Taste Ease Mood Uplifter



The India
Snacking Report
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FOREWORD

As they say, there are those who live to eat and those who believe in the converse. Irrespective, for us Indians, snacking has historically been an important gastronomical activity that culminates towards satiating the needs of both mind & body. More so, with fast changes in social, cultural, and economic dynamics, our consideration of snacks as a Safe, Tasty & Easy energy source and a Mood uplifter may see more traction.

India's snack consumption patterns have not only changed but still changing. The roles played by main course meals vs snacks are reaching the point of intersection. For sure, the consumer's relationship with their snacks has got deeper and become more meaningful.

Timing it right, we at Godrej Yummiez, in association with InQognito Insights (a market research company), thought of undertaking a consumer study with the objective to understand the (changing) attitudes & perceptions of Indian consumers when it comes to snacks & snacking. This report primarily focuses on the attitudes and perceptions towards the frozen snacks market.

Godrej Yummiez offers a range of frozen vegetarian and non-vegetarian ready-to-cook products.

This being the first report (volume 1), it focuses primarily on the Safety & Technology aspects. The other areas of Taste, Ease and Mood Uplifter have been discussed passingly.

As a thought leader, we believe that the future will not only be about balancing all these five pillars but also listening to the last-mile expectation of the consumers. The question to focus on is how we as manufacturers & marketers can partner with the consumers not only during the moments of their celebration but also as an assurer of all the five pillars mentioned above!

Speaking of safety, currently, a large part of Indian snacking economics is based on unhygienic production, storage, packaging, and delivery conditions. Is the organized, structured, and hygiene-focused frozen snacks industry the future solution to this challenge?



What comes out clearly is that going forward, the dynamics that will shape India's snacking habits will be based on the acronym STTEM – Safety, Technology, Taste, Ease & Mood Uplifter – the five pillars. While taste and ease/convenience have long been the key drivers, safety (hygiene factors during preparation, storage & delivery, use of preservatives, etc.), technology, and a mood uplifter are turning out to be the three new drivers for snacks.

This study not only brings in the consumer dynamics of India as a nation but also highlights the nuances of tastes & preferences across geographic zones, age groups, gender, etc. How many times are Indians snacking per day? What are the reasons that influence snack consumption? During what occasions do Indians think of snacking? What are the preferred types of snacks? How do they view the dynamic of safety within snacks? Are preservatives a major concern for people? What could be some of the preservative-free options...and many more!

The changing role & growing importance of snacks in India's lifestyle certainly means good news for the industry. The snacking industry is expected to grow at a CAGR of 11.5% by the financial year 2023 and is likely to reach a value of over INR 15 billion by 2024. At the same time, the frozen food market is pegged to be of approx INR 3500 crores.

I am bullish about frozen food category seeing over 10% growth in the coming years. The definition of what the best-suited snack is for an individual or a household has changed. Palates have changed. Consumers have become more conscious now. Hereon, it will be interesting to watch India's snacking industry growth story and how!

As responsible manufacturers and marketers of this category, we need to sustain our efforts towards R&D led innovations in order to balance all the five pillars i.e. STTEM, that will influence the future of snacking in India.

Happy reading!



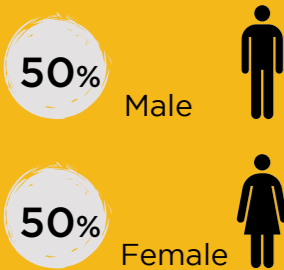
*Abhay Parnerkar,
Chief Executive Officer,
Godrej Tyson Foods Ltd.*

RESEARCH DESIGN

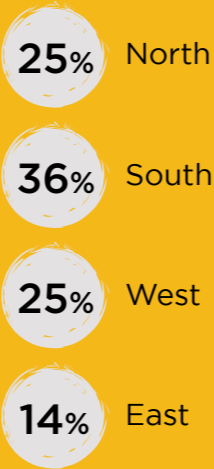
This consumer study was conducted by InQognito Insights—a leading market/consumer research service provider. The sample design composition comprised of the following details:

Total All India Sample:
2815 RESPONDENTS

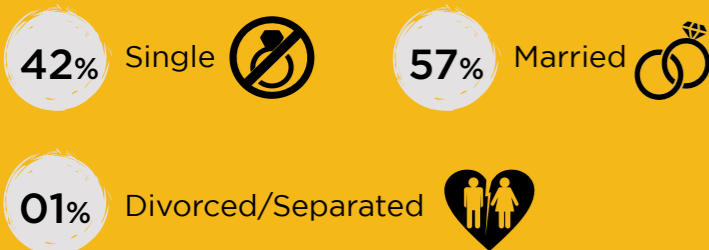
Gender Ratio



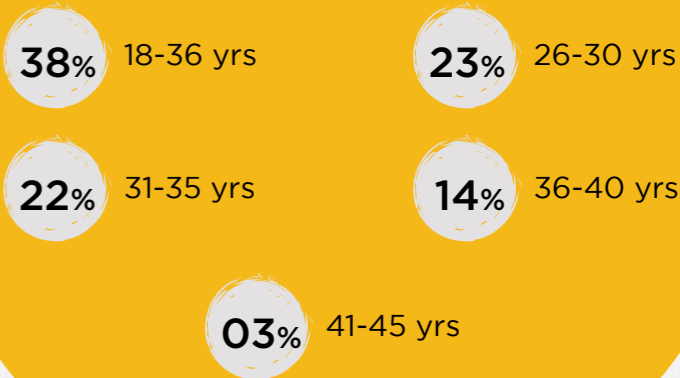
Geographic Representation



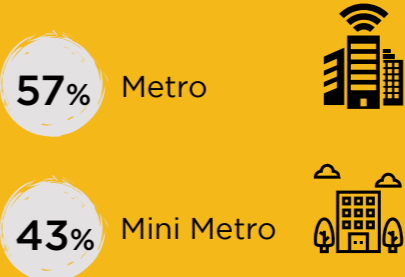
Marital Status



Age Groups



City



Working Status



KEY HIGHLIGHTS

SAFETY

Hygienic Preparation and Use of Preservatives

- 62% Indians actually limit their snacking consumption because they believe there is presence of preservatives
- 51% Indians feel less guilty to consume preservative-free frozen snacks
- 55% Parents feel guilty as they feel frozen snacks contain preservatives
- 52% Women will consume more frozen snacks if they are preservative-free
- 52% Indians prefer frozen snacks as they feel it is more hygienic

TECHNOLOGY

Individual Quick Freezing (IQF) Technology

- 53% Indians could recall they have heard of IQF technology (Delhi and Kolkata ranked amongst the top two cities)
- 17% could further manage to explain what IQF stands for
- 60% women recalled IQF technology better as compared to 46% men

TASTE

India's Preference for Potato/Vegetarian Frozen Snacks

- 73% Indians feel taste is the biggest reason for snacking
- 62% Indians feel potato-based snacks is an omnipresent part of their snacking platter
- 65% Indians prefer vegetarian frozen snacks (North India being the leading region)
- 65% Indians prefer potato-based snacks (potato bites, samosa, cheese bites, etc)
- 41% consume vegetarian frozen snacks daily
- 39% East India prefer non-vegetarian frozen snacks
- 38% South India prefer non-vegetarian frozen snacks
- 61% prefer Indian snacks over other options
- 43% parents believe children like frozen snacks

EASE

Convenience of Access, Storage, and Preparation

- 51% believe that frozen snacks are easily available and hence make it easier for consumption
- 50% Indians believe frozen snacks are convenient to cook
- 44% Indians believe that frozen snacks is easier to prepare by households without house help
- 55% Indians prefer frozen snacks on special occasions (parties, weekends, etc)
- 83% Mothers feel frozen snacks are quick-fix hunger solutions for kids
- 65% Indians confessed to indulging in anytime snacking

MOOD UPLIFTER

Correlation of Emotions to Snacking

- 55% Indians binge on frozen foods as a mood lifter on various occasions
- 72% Indians confessed to snacking when they are happy
- 74% Women snack when they are happy
- 70% Men snack when they are happy
- 60% Women snack when they are sad
- 52% Men snack when they are sad

- 76% Women snack more often than men
- 54% working women find snacking convenient for hunger management
- 52% fathers cook frozen snacks more than mothers

INDIA'S SNACKING PALLET

Some very interesting dimensions have emerged when it comes to how India perceives and consumes snacks.

Chips & Nachos as a category seem to be the universal favourites – in both metros and mini metros across north, south, east & west India. More than 80% of the respondents have voted for this category. Namkeens, Pakoras, Sandwiches, Biscuits & cakes take the subsequent ranks with a consideration score of more than 70%.

Consideration of food items as snacks across India:

	Categories	All India	North	West	East	South	Metro	Mini Metro	Male	Female
★	Chips, Nachos	84	88	82	83	82	85	82	80	87
	Namkeens	77	84	80	82	68	79	75	76	78
	Sandwiches	72	73	72	70	71	73	70	69	75
	Cooked Pakodas, Bread Pakodas	70	75	68	69	67	72	67	66	73
↑	Potato-based Snacks like Samosa, Potato Bites, Cutlet, etc	65	68	65	69	62	69	60	60	70
↑	Non-veg Frozen Items like Chicken Tikkas, Fish Fingers, Sausages, etc.	55	53	52	62	56	59	50	53	57
	Biscuits, Cakes	76	81	71	70	78	77	75	71	81
	Buns, Dhoklas, etc.	48	53	51	44	45	49	47	44	53

*The values are in percentage (%).



Clearly, our market's snacking preference is more dependent on Indian snacks as against western snacking categories. When asked about India's preference towards Indian vs Western snacks, the Indian version received majority votes. At a national level, 61% voted for Indian snacking category nationally. North (59%) and West (58%) zones individually witnessed a higher score in terms of those who would prefer Indian snacks.

The data also highlights that the recall for frozen snacks (veg and non-veg) is catching up fast. The recall of this category is not very far away from the regular or standard Indian snacks mentioned above. While the recall of veg frozen snacks was more than 60%, the nonveg category got a response from more than 50% Indians.

Preference for Indian Vs Western Snacks:

However, we also observed that close to a third of Indians showed their preference towards western snacks. At an all-India level, 28% voted for western snacks preference. Northern & Western India scored 30% and 33% respectively.

	All India	Mumbai	Pune	Ahmedabad	Delhi	Jaipur	Lucknow	Kolkata	Chennai	Hyderabad	Bangalore	North	West	East	South
Prefer Indian snacks more than Western Snacks															
Agree	61	56	59	61	60	60	57	67	67	67	55	59	58	65	63
Disagree	28	34	29	35	30	34	27	24	25	19	35	30	33	24	26
No opinion either way	10	10	12	05	10	06	17	11	08	14	10	11	09	11	11

*The values are in percentage (%).



INDIA'S SNACKING PATTERN

Recall or association of snacks with “meals” is a very interesting finding of this study.

Defining frozen food/snacks items	All India	North	West	East	South
Mini meals	50	52	51	50	49
Full meals	38	38	40	40	37

*The values are in percentage (%).

On average, half of India associates snacking with a mini meal. Not just that, close to 40% have already started considering it as a full meal! For those who consider it as a full meal, West and East India saw a common skew of 40% respondents.

This trend seemed more pronounced in the North with 55% of the respondents believing in this. Gender-wise, 46% of males and 53% of females resonated with this.

Meals getting recalled or associated as snacks

	All India	North	West	East	South	Metro	Mini Metro	Male	Female
Agree	50	55	50	50	46	53	45	46	53
Disagree	39	35	40	42	41	38	41	43	35
No opinion either way	11	10	10	08	13	09	14	11	11

*The values are in percentage (%).

What adds depth to the above finding is that every 4 out of 5 Indians agree to the fact that there has been an increase in the frequency of snack consumption. While the national average is more than 80%, zones like North, West, and East have seen an increase in consumption frequency amongst more than 90% of Indians.

Category	All India	North	West	East	South	Metro	Mini Metro
Snacking has increased	88	93	90	89	83	91	85
Snacking has decreased	12	07	10	11	17	09	15

*The values are in percentage (%).

Readymade packaged snacks turned out to be favourites amongst youngsters and kids while the homemade snacks category was preferred by adults & kids. Votes for homemade food came from 44% of adults and 38% of senior citizens. Readymade packaged

foods got a preference from 45% & 43% of India's youth and kids respectively.

Not just that, 34% of youngsters in the age group of 18-30 years Indians are the main influencers for the purchase of snacks from outside the home or readymade packaged foods.

Disposition towards Vegetarian and Non-vegetarian frozen foods across geographies:

The study also revealed if there has been a shift or increase in preference for veg vs non-veg frozen snacks across geographies.

Interestingly, all four geographic zones – North, South, East & West - witnessed an increase in both vegetarian as well as non-vegetarian frozen snacks.

North India showed the maximum increase (51% of respondents) in preference towards vegetarian frozen snacks.

Non-vegetarian frozen snacks preference witnessed maximum increase in East India (39%) and South India (38%). At an overall level, 45% of respondents affirmed the consumption increase in vegetarian frozen snacks whereas increase in consumption of non-vegetarian snacks got confirmed by 34%.

Let us look at some of the reasons stated by consumers

	All India	Mumbai	Pune	Ahmedabad	Delhi	Jaipur	Lucknow	Kolkata	Chennai	Hyderabad	Bengaluru
What could be some of the reasons behind the increase in snacking?											
Meals are too heavy; snacking is lighter on stomach	43	49	39	46	46	43	43	43	42	32	37
Less hunger so snacks are sufficient	35	36	31	36	36	38	41	41	36	25	31
Too busy to cook so packaged snacks more convenient	38	39	38	44	37	39	35	41	38	33	37
Don't feel like cooking so packaged snacks more convenient	21	23	18	26	21	23	19	20	18	23	20
More leisure time now	27	30	25	25	27	25	33	30	23	20	31
Tastier snacks more easily available now	44	41	52	41	49	46	28	45	45	46	42
Cooking light snacks is faster and easier than meals	26	20	24	24	28	36	28	28	29	28	22

*The values are in percentage (%).

While the reasons expressed are wide and many, what comes out interestingly is the consumer's association of snacks with emotions like "is lighter on the stomach", "more convenient", "tastier snacks easily available" and so on.

A very interesting aspect that came up in this study was that of snacks and main course meal timings merging or overlapping. Almost two-thirds of Indians are snacking anytime they feel like it - with no fixed time.

64% of males & 67% of females confessed to indulging in anytime snacking. This phenomenon echoed across 64% of western India, 69% in the North, 66% in the east, and 64% in the South.

In terms of consumption by Vegetarian frozen snacks, the former is being consumed at least once a week, if not more. Almost 4/5 of India consumes Vegetarian frozen snacks at least once a week. 41% have it daily. There was no difference across gender profiles.

Under the Non-vegetarian frozen snacks category, 65% of Indians have it at least once a week or more. Daily consumption was led by the East (20%) followed by a distant South (14%).



Snacking across dayparts:

In terms of dayparts, frozen snacks emerged as sought-after munching items during evenings. Close to half of India resonated with this. However, about a fifth of India also preferred frozen snacks for breakfast. Here, south India showed the least preference (13%) for frozen snacks as a breakfast item. Another 22% preferred consuming it between breakfast and lunch.

Frozen food snacking gaining preference:

Another trend that seems to be emerging is that frozen snacks as a category is gaining ground within the consideration set of Indians when it comes to snack consumption. Typically, one may categorize snack categories as follows:

- Homemade/freshly cooked snacks
- Snacks ordered from outside
- Pre-prepared packaged foods
- Frozen snacks

Now, when we asked respondents that out of the last 10 snacking occasions, which category they consumed the most, it turned out that the usage (%) of the frozen foods category was pretty much at par with the other three categories listed above. Frozen snacks category shared a similar usage trend with the other three - 1 to 5 times in the last 10 occasions.

Frequency in the last 10 snacking occasions	Homemade/ freshly cooked	Frozen snacks	Snacks ordered from outside	pre-prepared packaged foods
1	18	16	14	11
2	35	45	44	42
3	23	29	28	28
4	16	07	09	10
5	05	04	04	07
6	01	00	01	02
7	01	00	00	00
8	00	—	00	00
9	00	—	00	00
10	—	—	00	01

*The values are in percentage (%).

Further, what came out to be some of the key reasons why Indians are increasingly preferring frozen foods are as follows:

Reasons	All India	North	West	East	South	Metro	Mini Metro
Very tasty and delicious	73	77	74	69	72	76	70
Not easy/Don't Know to make these items at home from start	31	30	35	34	29	31	32
More hygienic than buying readymade from shop	52	51	56	53	50	55	49
We can cook it ourselves using our oil and vessels so more control	44	39	46	49	45	45	43
Convenient to cook/fast and quickly ready	50	51	48	51	51	51	50
High variety and different kinds of items	35	33	34	35	36	35	35
Easily available	51	52	47	49	53	51	51
Liked by children/family members	43	46	39	42	44	43	43
High quantity, can serve many	42	42	41	42	44	43	42
Made by trusted brands	31	32	31	29	30	31	30

*The values are in percentage (%).

While the aspect of taste and convenience are obvious, other reasons like hygiene, convenience, variety and brand trust are some other reasons behind liking frozen foods.

52% of the respondents believed in the advantage of hygiene when it comes to frozen food.



INDIA'S PREFERRED SNACKING OCCASIONS

What triggers or occasions create a recall for snacks among Indian consumers? Well, the term any time snacking seems to be emerging strongly. Which means there are no specific time bands when snacks are being consumed.

No specific time to snack, any time is snack time	All India	North	West	East	South
Agree	65	69	64	66	64
Disagree	24	21	25	26	25
No opinion either way	10	10	11	08	10

*The values are in percentage (%).

This made us probe further. When one does a deep dive on the occasions they recall or think of snacking, it runs into a long list.

Two occasions that jointly take the top spot are - a) Weekend snacking and b) Party/guests/celebrations. These two individually resonate across an average of 45% of the Indians.

Occasions when Indians recall or think of snacking



Situations	All India	North	West	East	South	Metro	Mini Metro	Male	Female
Party/Guests/celebrations	45	47	43	47	44	45	46	44	47
Weekend Snacking	45	45	45	45	46	46	45	45	46
As an accompaniment with alcoholic beverages	28	26	27	31	28	29	27	28	28
As a side dish in a meal	32	32	32	32	32	33	31	33	32
When there is no one to cook	28	29	28	31	27	29	27	28	29
Daily snack before meals	19	21	18	21	18	20	17	18	20
As a substitute to meal	20	20	22	21	20	21	19	20	20
Just like that/when bored/timepass	28	30	26	28	29	28	29	26	30
When children feel hungry	30	30	26	30	33	31	29	29	30
When studying/exams - children	24	26	22	28	24	25	24	24	25
When in office/munching in office	25	26	23	27	24	25	24	24	25
Along with tea/coffee	22	23	19	19	24	22	21	20	23

*The values are in percentage (%).



While around 32% of Indians consider snacks as a side dish during mealtime, around 20% think of snacks during mealtime – in other words as a meal substitute. This resonated not only across north, west, east & south but also in metros and mini-metros.

How do the preferences for snacking occasions pan out across the metros?

Preferred occasions for snacking across metros	Mumbai	Pune	Ahmedabad	Delhi	Jaipur	Lucknow	Kolkata	Chennai	Hyderabad	Bengaluru
Party/Guests/celebrations	43	46	41	44	50	54	47	45	44	44
Weekend Snacking	45	47	44	46	44	46	45	49	43	45
As an accompaniment with alcoholic beverages	29	20	32	24	21	35	31	31	17	36
As a side dish in a meal	33	28	35	30	33	38	32	37	23	35
When there is no one to cook	28	25	31	28	28	33	31	31	22	28
Daily snack before meals	18	17	19	22	15	25	21	21	13	17
As a substitute to meal	21	21	24	20	17	22	21	23	14	21
Just like that/when bored/timepass	25	31	24	31	27	31	28	29	23	35
When children feel hungry	28	18	27	32	30	27	30	34	34	30
When studying/exams – children	23	22	17	23	30	33	28	26	17	28
When in office/munching in office	22	24	23	24	27	29	27	27	18	26
Along with tea/coffee	20	18	16	24	23	21	19	26	21	23

*The values are in percentage (%).

How do the preferences for snacking occasions differ across Males Vs Females?

Preferred occasions for snacking	Male	Female
Party/Guests/celebrations	44	47
Weekend Snacking	45	46
As an accompaniment with alcoholic beverages	28	28
As a side dish in a meal	33	32
When there is no one to cook	28	29
Daily snack before meals	18	20
As a substitute to meal	20	20
Just like that/when bored/timepass	26	30
When children feel hungry	29	30
When studying/exams – children	24	25
When in office/munching in office	24	25
Along with tea/coffee	20	23

*The values are in percentage (%).



INDIA'S VIEW OF STTEM – THE FIVE PILLARS

SAFETY, TECHNOLOGY, TASTE, EASE & MOOD UPLIFTER

As mentioned earlier, this study primarily focuses on frozen snacks as a category.

We found that attitude towards this category was mixed. While a majority (80%) were bullish and agreed that the consumption will only go up, around 20% of the consumers currently do not hold any opinion about this category at all. There was another section of respondents who brought to light some ground dynamics that we as an industry should keep in mind.

Around 40% respondents lack knowledge about the issues around preservatives in snacks. Hence, trusted brands need to create awareness around preservative-free.

Indian snacking pattern has changed drastically and we believe it will continue to change going forward. Based on this study, it is clear that Indian preference or disposition towards snacking is currently based on the following five pillars:

Safety (hygienic preparation and use of preservatives)

Technology (Individual Quick Freezing technology)

Taste (India's preference for potato/vegetarian frozen snacks)

Ease (convenience of access, storage, and preparation)

Mood uplifter (Correlation of emotions to snacking)

As mentioned earlier, this being the first edition of the report, primarily focuses on Safety and Technology. The other three pillars have been given a sneak peek.

The chart below amplifies the role of individual pillars of STTEM. The table below showcases the growing concern areas that consumers feel that are impacting their decision to consume snacks:



Factors influencing snacks consumption:

Areas which need to be addressed	All India	North	West	East	South
Not Very tasty and delicious	08	08	12	06	06
Oily and unhealthy	20	22	21	21	19
Have many preservatives	17	17	17	19	17
Limited number of items	14	12	15	17	14
I feel it is not fresh	10	09	08	09	12
Don't know what kind and quality of ingredients have been used	05	05	04	03	06
Takes time to soften/hard	07	08	07	05	07
Gets spoilt fast after cooking/needs to be eaten soon when hot	07	07	06	07	07
Not easily available	03	02	03	04	03
Not as tasty as those made at shop/sweets shop	02	03	02	02	02
Expensive/High priced	06	06	06	07	06

*The values are in percentage (%).

While taste and ease are obvious drivers, safety, technology and mood uplifter have emerged as three new key influencers or drivers.

In the following pages, the findings of the study have been categorized under each element of STTEM as stated above.

SAFETY

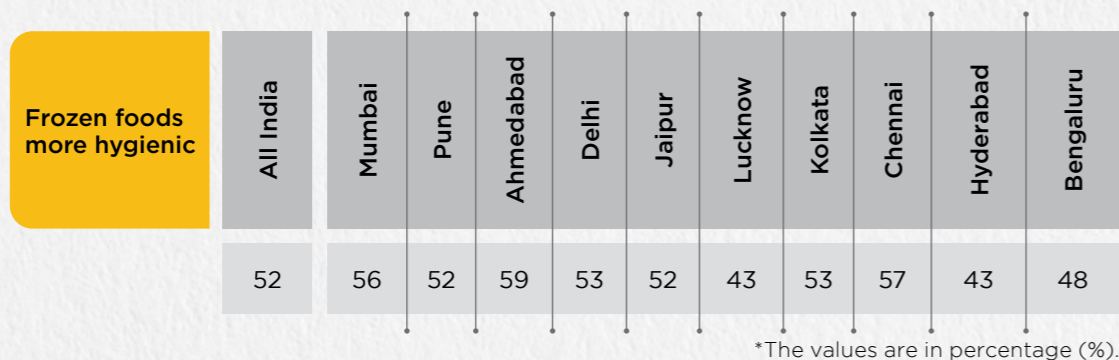
Before we go into the findings of the study, we would like to establish the definition or the scope of the terminology called safety with reference to frozen snacks. Safety, when it comes to frozen snacks, comprises at least of three-step processes:

- How hygienically it is prepared/cooked
- How safely it is stored, packed
- Whether the snack contains preservatives, oil etc.
- Delivery

Based on the findings, some interesting observations emerge:

Reinforcements:

1. 52% of Indians prefer frozen snacks/foods as they feel it is more hygienic than buying readymade from shops.



2. 53% Indians believe that both vegetarian and non-vegetarian snacks should be consumed less frequently and they are unhealthy because of preservatives.

Change agents and concerns regarding preservatives:

1. While 62% Indians actually limit their snacking consumption due to the presence of preservatives, for 44%, the presence of preservations remains to be a top concern.

Geographically, Western & Southern India resonated with this emotion to the extent of 62 & 64% respectively. North and East shared a common score of 59%.

2. 53% of Indians believe that both vegetarian and non-vegetarian snacks should be consumed less frequently and they are unhealthy over the long run.

While the east was more worried about preservatives, south and western India were becoming more health conscious.

To assess whether a snacking item is safe to consume, Indians have developed ways to assess the safety standards.



Below are some of the key ones:

1. 62% of India studies an item's stocking period while it is on the shelf. The duration between manufacturing & expiry dates is used by them to evaluate the safety parameter of the snacking item in terms of the use of preservatives.
2. 57% use their sense of taste after cooking it to evaluate its freshness. How fresh a frozen snack tastes after cooking leads to an understanding of the use of preservatives.
3. Close to 60% are watchful of the amount of oil used in the preparation of frozen snacks.
4. 46% go with the writing on the packaging. Lines like "No preservatives" act as assurances for this set of consumers.

Storage of frozen foods:

While the above are practical on-ground dynamics faced by consumers, storage of frozen foods plays an important role in maintaining their freshness and safety.

Close to 3 out of every 4 Indians cited the use of refrigerators (and the freezer section in certain cases) for the storage and safety of frozen snacks.

The study revealed that more than half of India follow Zip lock plastic bags or air tight containers for packaging.

Consumer suggestions:

The respondents of this survey also gave us a sense of the areas that consumers are expecting to be addressed or improved.

The majority of the responses hovered around areas such as:

- Use of oil & preservatives making it unhealthy.
- Lack of variety or limited items.
- Lack of fresh feel.
- Unsure about the quality of ingredients.



India's concerns about Preservatives in Snacks

Delving deeper into the safety aspect, close to half of the respondents believed that it is not possible to make frozen snacks without adding preservatives. Precisely for this very reason, they would want frozen food manufacturers to make changes in the snacks offerings.

This emotion came out strongly across the key cities of India.

	All India	Mumbai	Pune	Ahmedabad	Delhi	Jaipur	Lucknow	Kolkata	Chennai	Hyderabad	Bengaluru
Do not like frozen snacks because it has many preservatives	44	43	44	48	43	43	43	46	48	39	42

*The values are in percentage (%).

Close to half of India was very vocal about their desire to consume snacks that are preservative-free.

In fact, it was found that the presence of preservatives elevates a sense of guilt. More than half of Indians expressed feeling guilty serving snacks because they believe they contain preservatives.

	All India	Mumbai	Pune	Ahmedabad	Delhi	Jaipur	Lucknow	Kolkata	Chennai	Hyderabad	Bengaluru
Feeling guilty about serving frozen snacks carrying preservatives											
Disagree	12	13	15	17	11	14	10	14	11	12	12
Neither Agree nor Disagree	30	31	29	31	32	34	29	29	30	30	27
Agree	51	49	50	47	52	46	50	52	56	49	47
Don't know	07	08	06	05	05	06	11	05	04	10	14

*The values are in percentage (%).

When one digs deeper, it comes out that the reason why they resonate with the above emotion is their understanding that both vegetarian and non-vegetarian frozen snacks can be preserved by their packaging and don't need preservatives

	All India	Mumbai	Pune	Ahmedabad	Delhi	Jaipur	Lucknow	Kolkata	Chennai	Hyderabad	Bengaluru
Frozen snacks can be preserved by its packaging and don't need preservatives											
Disagree	15	15	18	11	13	17	14	14	12	20	18
Neither Agree nor Disagree	29	30	27	38	27	33	23	27	26	31	28
Agree	50	51	48	47	55	43	47	52	59	40	44
Don't know	07	04	07	04	05	07	17	07	03	10	10

*The values are in percentage (%).

The art of evaluating the presence of preservatives:

The above section spoke about consumers' moods when it came to the safety parameter of frozen snacks with specific reference to preservatives. The good thing is that consumers are trying to evaluate how healthy and safe a snacking item will be. They examine the presence of preservatives in a snacking item based on some parameters.



How does India evaluate the presence of preservatives in snacks?									
Parameters	All India	North	West	East	South	Metro	Mini Metro	Male	Female
By seeing the amount of oil which acts as preservative	57	59	59	55	54	58	55	54	59
Seeing how long it lasts on the shop/stocked	62	61	60	66	61	63	60	63	61
Tastes fresh when cooked even though packaged	57	55	59	57	57	60	53	59	55
Very salty to taste	46	44	48	48	45	47	45	47	45
Written in the packaging	46	49	43	45	48	44	50	48	45
Heard from others/read about it	27	32	22	24	28	25	29	27	27

*The values are in percentage (%).

The study revealed that consumers use the following parameters to evaluate the presence of preservatives and therefore the safety quotient of the frozen snack. It is less based on hearsay and more on the tangible evidences and experiences with the products:

1. Shelf life
2. Taste
3. Oiliness



TECHNOLOGY

IQF Technology – the solution to safety!

Innovative and sustainable product storage & packaging technologies go a long way in fortifying the safety assurance within the minds of the consumer. Within the Indian frozen foods market, this aspect has a key role to play.

IQF Technology

Individual Quick Freezing (IQF) stands for the quick freezing of individual pieces of the product, as opposed to freezing it in bulk or blocks. The important feature of this process is ultra-rapid freezing to very low temperatures (-30°C to - 40°C) designed to halt the activities of the microorganisms that cause decay and deteriorate food items. **The best outcome of IQF technology is that the food item does not need any preservatives in it.**

IQF technology goes back to the 1960s when the freezing tray freezer was introduced on the market. It was an immediate success as the prior freezing methods revolved around block freezing of products which degraded the overall quality due to its long freezing time. IQF process is best done with a flash freezer (blast freezer) due to its unique flash freeze technology. It allows freezing each product without slowing down the freezing time by adding more products to the freezer. IQF freezers are now using new forms of quick freezing to make sure that the product that is being frozen is not only frozen completely, but also maintains proper moisture, flavour, and texture.

India is the world’s second-largest producing and processing country in the world after China. It has the potential to be the biggest within the food and agricultural sector. With India’s food production likely to double in the next decade, there is an opportunity for large investments in food and food processing technologies, skills and equipment, – especially in areas of Canning, Dairy and Food Processing, Specialty Processing, Packaging, Frozen Food/ Refrigeration, and Thermo Processing.

IQF Technology comes as the answer to all of this!

All Godrej Yummiez products are frozen with the IQF or individually quick frozen technology to ensure the highest safety & quality standards across taste, hygiene, and health. **This is why the Godrej Yummiez products are free of preservatives!**

Awareness about IQF Technology in India:

We found that while more than half (53%) of Indians could recall the term “IQF”. Further, only 17% could actually explain what this terminology means or stands for. This clearly shows that there is huge scope to educate consumers about the role and importance of IQF technology.



When one investigates more about the awareness levels of IQF Technology, we find that while cities like Delhi & Kolkata could recall it better, other cities like Pune and Bengaluru comparatively saw lower recall levels of 41% and 33% respectively

Have you heard or read about IQF (Individual Quick Freeze) technology for frozen snacks?	All India	Mumbai	Pune	Ahmedabad	Delhi	Jaipur	Lucknow	Kolkata	Chennai	Hyderabad	Bengaluru
Yes, have heard or read about it	53	54	41	39	73	42	51	61	50	57	33
No, have never heard about it	47	46	59	61	27	58	49	39	50	43	67

*The values are in percentage (%).

In terms of market strata, mini metros scored lower (44%) on the recall of IQF Technology.

Have you heard or read about IQF (Individual Quick Freeze) technology for frozen snacks?	Metros	Mini Metros	Male	Female
Yes, have heard or read about it	59	44	46	60
No, have never heard about it	41	56	54	40

*The values are in percentage (%).

Gender-wise, women seemed more informed about this technology as they scored a high recall of 60% as compared to just 46% amongst men.



TASTE

It's a no-brainer! All these years, towards the success of snacks, specifically the frozen snacks category, the element of taste has been one of the key driving factors. For 3 out of every 4 Indians, the taste parameter is the key driver for the consumption of frozen snacks. It is this taste factor that makes frozen snacks gain popularity among kids and other family members.

44% of Indians believe that tastier snacks are easily available now. On average, 44% of both male and female sample base resonated with this feedback.

Tastier snacks are more easily available now

All India	Mumbai	Pune	Ahmedabad	Delhi	Jaipur	Lucknow	Kolkata	Chennai	Hyderabad	Bengaluru
44	41	52	41	49	46	28	45	45	46	42

*The values are in percentage (%).

No wonder, as you must have read in one of the previous sections, the taste factor has contributed to the popularity of frozen snacks and is consumed across various occasions – from being a weekend snack to supporting parties/guests visits/celebrations or as a side dish meal or even when the kid is hungry.

The element of taste plays another dynamic as well. The sense of taste is used by consumers to assess the level of preservatives and oil in the snacking food item. For example, we found that consumers interpret or correlate the freshness of packed foods with the presence of preservatives.

The snacking item tastes fresh when cooked even though packaged because of preservatives

All India	Mumbai	Pune	Ahmedabad	Delhi	Jaipur	Lucknow	Kolkata	Chennai	Hyderabad	Bengaluru
57	60	51	67	58	48	56	57	65	43	57

*The values are in percentage (%).



EASE

Ease or convenience has been another key driver that has built the affinity quotient towards frozen snacks amongst Indian consumers.

The feedback received from Indian consumers on the parameter of ease or convenience has been diverse. Below are some interesting findings:

1. 51% believe that frozen snacks are easily available and hence make it easier for consumption.

Ease of access: Snacks are easily available now

All India	Mumbai	Pune	Ahmedabad	Delhi	Jaipur	Lucknow	Kolkata	Chennai	Hyderabad	Bengaluru
51	45	53	45	57	41	51	49	51	59	48

*The values are in percentage (%).

2. Close to half of India believes that it is convenient to cook using their own oil and vessels.

We can cook it ourselves using our oil and vessels so more control

All India	Mumbai	Pune	Ahmedabad	Delhi	Jaipur	Lucknow	Kolkata	Chennai	Hyderabad	Bengaluru
44	45	44	50	40	38	37	49	45	42	47

*The values are in percentage (%).

3. 43% of Indians are pro-snacking as they believe that main course meals are too heavy on the stomach.

Meals are too heavy; snacking is lighter on the stomach

All India	North	West	East	South
43	45	46	43	37

*The values are in percentage (%).



4. 44% of Indians believe that snacks make it easier for those households who do not have maids or cooks.

Only households without maids & cooks use frozen snacks	All India	Mumbai	Pune	Ahmedabad	Delhi	Jaipur	Lucknow	Kolkata	Chennai	Hyderabad	Bengaluru
Disagree	25	25	34	23	25	22	26	23	21	28	29
Neither Agree nor Disagree	28	28	30	31	23	33	25	30	28	28	25
Agree	44	46	33	44	49	40	39	44	50	37	41
Don't know	04	02	03	02	03	05	09	03	01	07	05

*The values are in percentage (%).

5. Close to 60% believe that it is used mostly by younger and unmarried people.

More of younger & unmarried people use frozen snacks	All India	Mumbai	Pune	Ahmedabad	Delhi	Jaipur	Lucknow	Kolkata	Chennai	Hyderabad	Bengaluru
Disagree	12	12	15	09	10	15	16	11	09	10	17
Neither Agree nor Disagree	26	26	26	31	24	31	23	29	26	20	25
Agree	59	57	55	57	64	51	50	58	64	65	52
Don't know	04	04	04	03	03	03	11	03	02	06	06

*The values are in percentage (%).



6. 38% prefer snack items as they are too busy to cook meals.

Too busy to cook so packaged snacks more convenient	All India	North	West	East	South
	38	37	40	41	36

*The values are in percentage (%).

7. 35% of Indians believed that hunger levels have gone down and hence snacking will suffice.

Less hunger so snacks are sufficient	All India	North	West	East	South
	35	38	35	41	31

*The values are in percentage (%).

8. 1 in every 4 Indians prefers snacking due to reasons such as:

- They have more leisure time
- Cooking light snacks is faster and easier than meals
- The willingness to cook has reduced

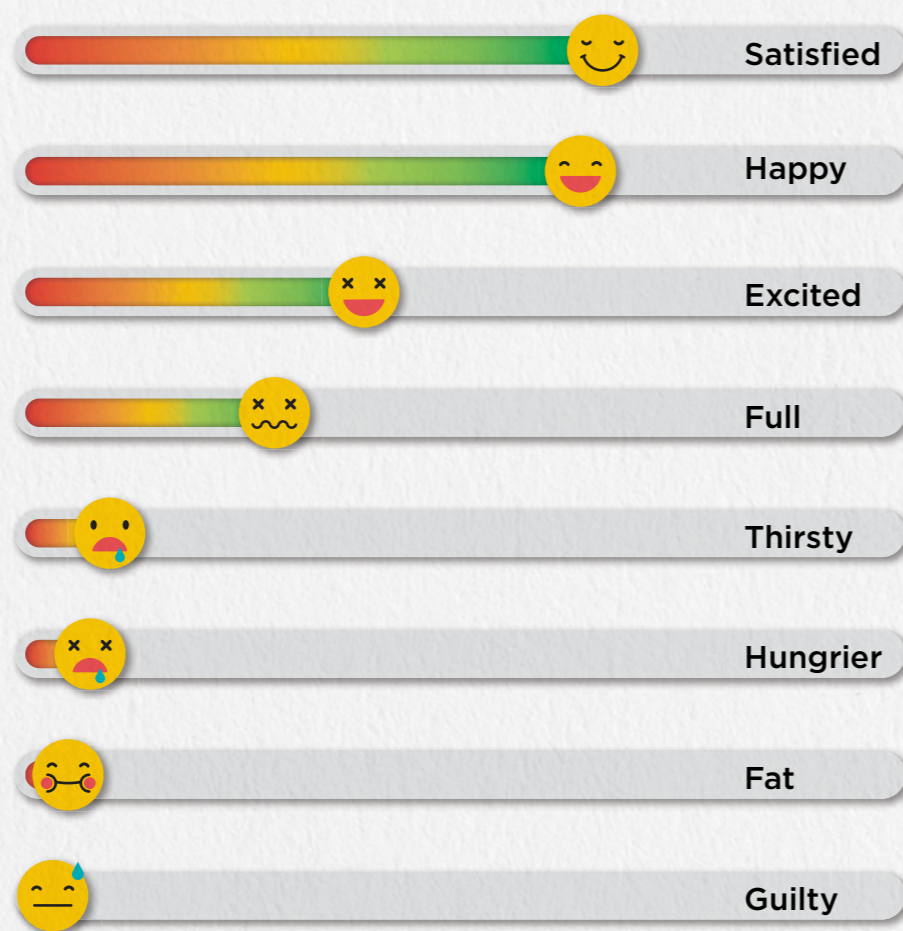
The findings did not show any contrary trends across gender profiles. Both males and females resonated with the same feeling.



MOOD UPLIFTER

40% of Indians believe that snacking helps come out of boredom and uplifts mood.

When probed further, we found that around 70% of the respondents actually feel satisfied, happy and excited after consuming snacks.

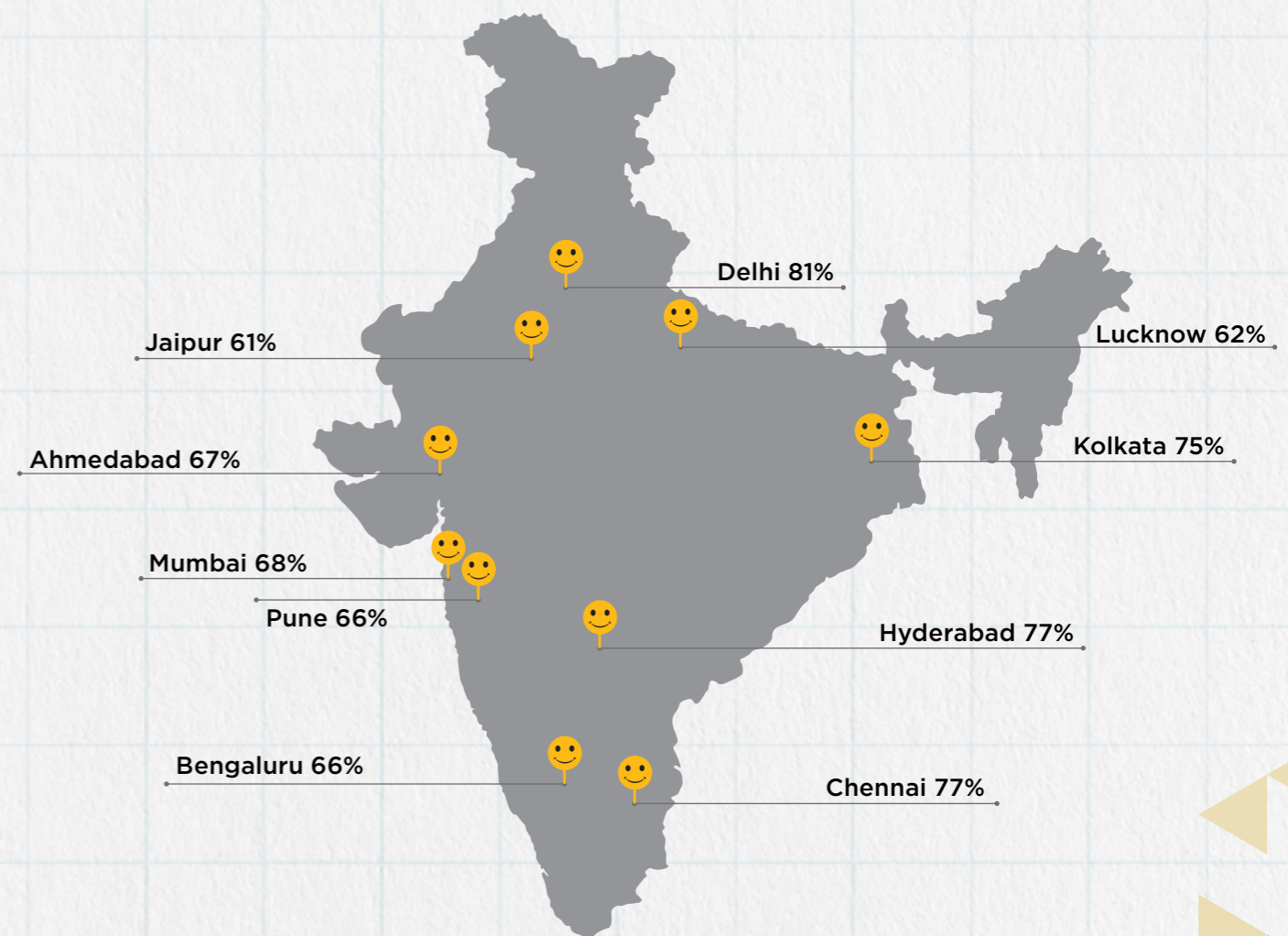


Amongst those who connect snacking with their mood, 72% confessed to snacking more when they were happy whereas 56% agreed to snack more when they were sad.

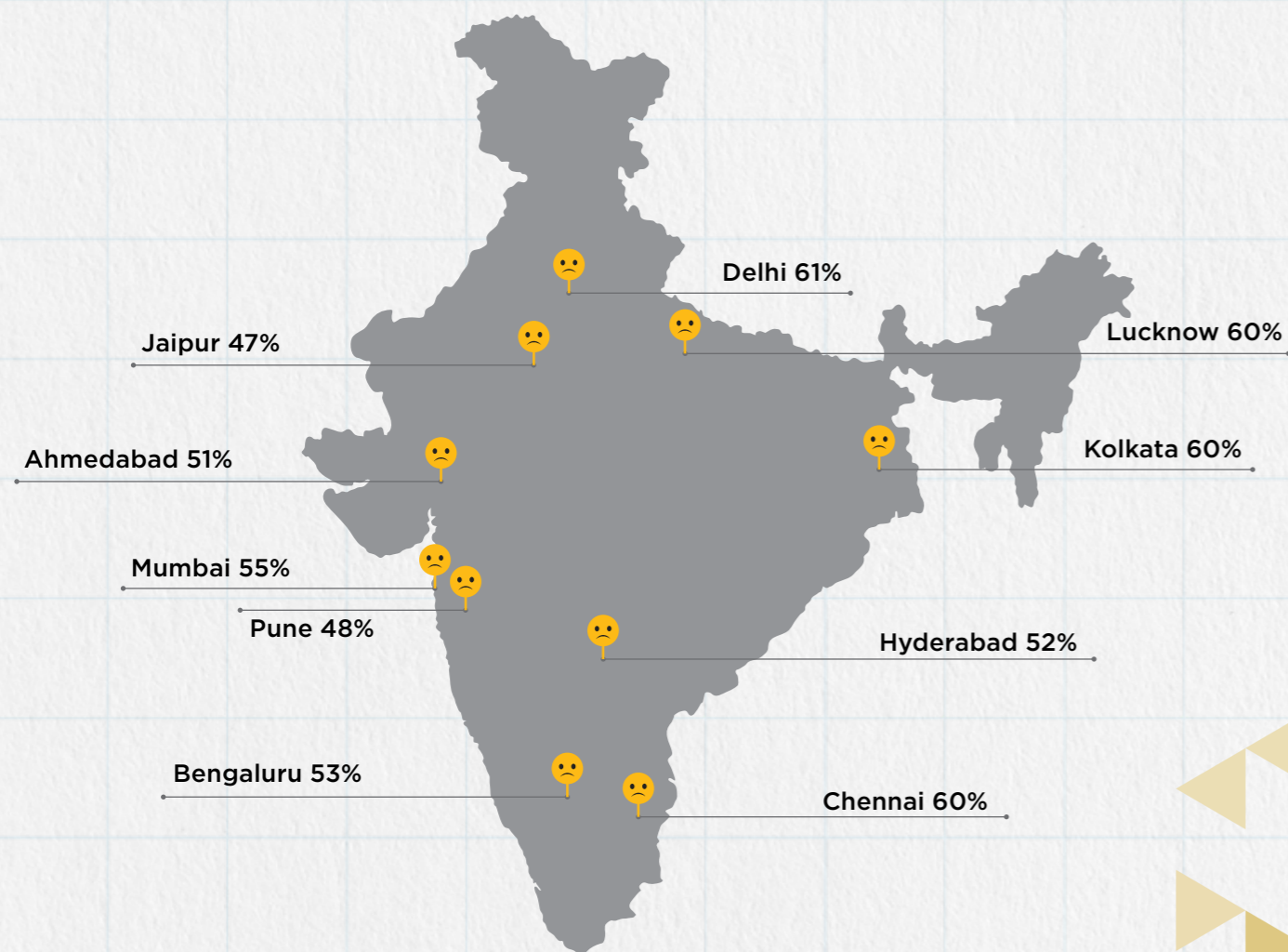
Eastern India showed the maximum skew with 75% of its citizens snacking when they were happy. North, West, and South India showed near similar levels of emotions scoring 72%, 67%, and 74% respectively. When it came to snacking due to sadness, 60% of Eastern India resonated with this correlation. North, West, and South India showed near similar levels of emotions scoring 58%, 52% and 55% respectively.

The above finding gets corroborated even more when you look at city wise data.

IN TERMS OF THOSE WHO TEND TO SNACK MORE WHEN THEY ARE HAPPY, THE SCORES ACROSS CITIES ARE AS FOLLOWS:



UNDER THE CATEGORY OF THOSE WHO
SNACK MORE WHEN THEY ARE SAD,
FOLLOWING ARE THE CITY WISE SCORES:



PARENTS' VIEWS ON SNACKING

Indian parents have started believing that gone are the days when there used to be fixed or specific times for snacking. Now, any time is snack time!

Parents who feel there is no specific time to snack - anytime is a snack time	Male	Female
Agree	66	71
Disagree	25	20
No opinion either way	09	09

*The values are in percentage (%).

66% of male and 71% of female parents believe that there is no fixed time for snacking. Any time is a good time for snacking.

What comes out very interesting is that parents have started correlating snacking with the term 'meal'.

Parents who correlate snacks with mini or full meals	Male	Female
Mini meals	52	54
Full meals	34	35

*The values are in percentage (%).

More than half of India's parents consider snacks as mini meals. Male – 52% and Female – 54%. Not just that, more than a third of India's parents have started considering snacks as full meal. 34% of males and 35% of females affirmed this trend.

Fathers tend to use and cook frozen foods more than mothers. While this was observed across more than half of India, this sentiment echoed across the key cities of the country.



Do fathers' tend to cook frozen snacks more than mothers?	All India	Mumbai	Pune	Ahmedabad	Delhi	Jaipur	Lucknow	Kolkata	Chennai	Hyderabad	Bengaluru
Disagree	10	06	16	05	09	07	12	07	12	15	11
Neither Agree nor Disagree	37	43	25	51	43	47	31	34	28	36	37
Agree	52	49	54	42	48	45	53	58	60	49	51
Don't know	01	02	05	02	01	01	04	01	00	01	01

*The values are in percentage (%).

Bengaluru was in the lead with the city's fathers scoring the highest of 60%. Kolkata father came a close second with a score 58% who cook frozen snacks more than mothers.

Not just that, 54% of the mothers from across the country corroborated this fact.

However, as a matter of concern, 55% of parents from across the country, feel guilty about serving frozen food snacks to kids as they contain preservatives.

As parents, feel guilty about serving frozen food snacks to kids as they contain preservatives	All India	Mumbai	Pune	Ahmedabad	Delhi	Jaipur	Lucknow	Kolkata	Chennai	Hyderabad	Bengaluru
Disagree	17	20	14	19	18	26	20	18	11	15	12
Neither Agree nor Disagree	26	27	27	26	25	30	28	25	27	27	27
Agree	55	51	57	51	57	43	55	58	61	55	60
Don't know	02	02	02	05	01	01	03	03	00	03	01

*The values are in percentage (%).

- Cities like Pune, Delhi, Chennai & Bengaluru showed higher skews!
- 56% of the mothers from across the country shared this guilt!

CONCLUSION

The Indian consumer's decision to consider, buy and consume snacks is no longer based on the parameters of just taste and ease or convenience.

Today, the Indian household is looking for assurances across the five pillars – STTEM – safety, technology, taste, ease, and mood uplifter. Needless to say, the safety component is becoming more pronounced.

The quality of ingredients, process of preparation, storage, use of oil & preservatives, packaging, and delivery, are all contributing towards a consumer's confidence in not just the brand but also in the category at large.

The use of oil and preservatives are under the strongest spotlight now. Consumers have devised their own methodologies that are helping them accept or reject snacking items.

This Godrej Yummiez study was initiated because it not only wanted to deliver as per consumer requirements but also trigger an informed discussion among the manufacturing and marketing industry stakeholders.

We will come up with more such research initiatives in the coming times and share many other insights.

We wish you a very happy festive season ahead!




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