



# STTEM 2.0

Safety | Technology | Taste | Ease | Mood Uplifter

## INDIA'S FROZEN SNACK REPORT

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# FOREWORD

The inaugural release of the STTEM report in 2022 met with tremendous success. The novel framework of **SAFETY, TECHNOLOGY, TASTE, EASE, and MOOD** achieved dual purposes. On one hand, it created a new purchase checklist for the growing Indian Frozen Snacks consumer base. On the other, it nudged the manufacturers and related industry stakeholders to reevaluate their business approach.

I am very happy to present to you the second and enriched version of this trendsetting report – titled **STTEM 2.0 – India's (Frozen) Snacking Report**.

What's new in this report? While the previous report established the importance of a holistic framework of STTEM (safety, technology, taste, ease, and mood), this report busts the age-old myth that Frozen Snacks are unhealthy and unsafe to consume because of preservatives!

STTEM 2.0 study reveals that, more than half of Indians (staying in metros and state capitals) believe that Frozen Snacks are preservative-free. Healthcare professionals also resonated similarly. The fact that Frozen Snacks can be safe if manufacturers and marketers follow strict guidelines is established in this report. Second, we added a new dimension by getting the health experts – doctors, fitness experts, dieticians – to speak on the consumption of Frozen Snacks and share their views on this topic extensively.

The report highlights that the ever-transitioning Indian lifestyle has brought us to a juncture where more than half of Indians (staying in metros and state capitals) are now consuming frozen snacking items as meals. More so, you will see health experts agree with the report's findings that around 40% of Indians (staying in metros and state capitals) regard frozen snack consumption as mini meals. Not just that, Indian consumers are bullish about a further increase in the consumption of Frozen Snacks in the coming times.

STTEM 2.0 includes two very interesting sections. One section deep dives into more than ten different reasons or triggers that influence Indians to consume snacks – parties, weekends, physical intimacy, OTT consumption, no one at home to cook, children's hunger pangs, television programs, alcohol accompaniments, etc. The other showcases the preferred snacking items of Indian consumers during various Indian festivals like Diwali, Holi, Onam, Eid, Ganesh Chaturthi, Baisakhi, etc.

Such on-ground dynamics add even more responsibility for us to operate more transparently, and ensure safe and high-quality frozen snacking products that are free of preservatives and other harmful elements. STTEM 2.0 shows that more than two-thirds of India (69%) believe that there is a huge lack of awareness about the safety aspect of frozen snacks.



Just as last report forecasted a promising future for the Frozen Snacks industry, I am optimistic about the significant growth in the Frozen Snacks industry in the coming years as well. Consumers are evolving, and so are their preferences. Palates are changing, and consciousness about health and safety is on the rise.

I invite you to delve into the STTEM 2.0 report, where we explore not just the trends but the dynamics that define the Frozen Snacks snacking experience in India.

***Thank you for being part of this exciting journey.***

Warm regards,



***Abhay Parnerkar,***  
*Chief Executive Officer,*  
*Godrej Foods Limited.*

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# RESEARCH DESIGN

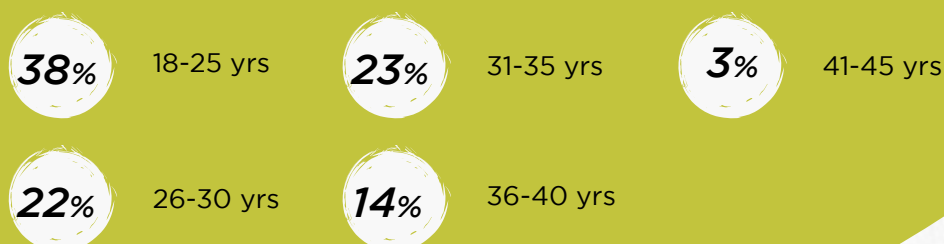
This consumer study was conducted by YouGov – a global market/consumer research service provider headquartered in the United Kingdom. The sample design composition was comprised of the following details:

This India online survey panel was comprised of 2004 respondents, using a quota-based sampling approach for the representation of different age groups, genders, and target markets.

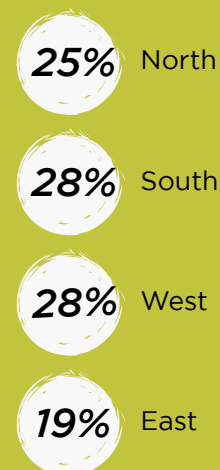
## Gender Ratio



## Age Groups



## Geographic Representation



## Marital Status







# DEFINING STTEM - THE DRIVERS OF THE INDIAN FROZEN SNACKING INDUSTRY



## ***Godrej Tyson's way of safeguarding the success of India's frozen snacking Industry:***

India's Frozen Snacks industry has experienced remarkable growth, and at its core are five key factors that Godrej Tyson believes will play a pivotal role in shaping its success. These factors can be succinctly captured through the acronym STTEM - Safety, Technology, Taste, Ease, and Mood Uplifter.





### ***Ensuring Consumer Trust***

In a world increasingly conscious of health and safety, the Frozen Snacks industry in India places a premium on safety standards. From the sourcing of raw materials to the final packaging, stringent measures are implemented to guarantee the safety of the snacks produced. This commitment not only ensures compliance with regulations but also fosters consumer trust, a cornerstone of sustained success.



### ***The Tech Touch in Every Bite***

Technology is the backbone of the Frozen Snacks industry, permeating every stage across raw material sourcing, storage, production, packaging and distribution. Cutting-edge machinery ensures efficiency and precision in production, while advanced quality control technologies ascertain that every snack meets the highest standards. Additionally, technology facilitates streamlined storage and distribution networks, ensuring that Frozen Snacks reach consumers with optimal freshness.



### ***The Heart of Consumer Appeal***

Taste is the linchpin of the Frozen Snacks industry. Unique and appealing flavors drive consumer preferences and contribute significantly to the success of the Frozen Snacks category. Continuous innovation in taste, whether through experimenting with local flavors or introducing global trends, keeps the industry dynamic and responsive to ever-evolving consumer palates.



### ***Convenience as a Cornerstone***

The Frozen Snacks industry recognizes the modern consumer's need for convenience. Ease of access and consumption are pivotal to the success of this industry. From single-serve packaging to on-the-go formats, the industry caters to the fast-paced lifestyles of consumers, ensuring that snacking is a hassle-free and enjoyable experience.



### ***Beyond Satiating Hunger***

Snacking is not merely about fulfilling hunger. It is about uplifting moods and enhancing experiences. Whether it's a quick energy boost during work hours or a companion during leisure moments, snacks in India are designed to be mood uplifter. This emotional connection with consumers fosters brand loyalty and contributes significantly to the industry's success.

***The acronym STTEM encapsulates the essential elements driving the success of India's snacking industry. By prioritizing Safety, leveraging Technology, perfecting Taste, ensuring Ease, and serving as a Mood Uplifter, the Frozen Snacks industry not only meets but anticipates the diverse needs and preferences of its consumers. This is the only way this industry will achieve sustained growth and scale.***

# KEY HIGHLIGHTS

*Key findings of this study as per the Safety, Technology, Taste, Ease, and Mood Uplifter (STTEM) pillars:*

## SAFETY (S)

### CONSUMERS:

- 67%** of Indians consume Frozen Snacks because they are made by trusted brands.
- 57%** of Indians believe that Frozen Snacks are safe for consumption.
- 65%** of Indians are aware of the type and quality of ingredients used in Frozen Snacks.
- 35%** of Indians would like manufacturing brands to talk about the fact that frozen snacks are preservative-free.

### HEALTH PROFESSIONALS:

- 41%** believe that frozen snacks can be cooked by individuals at home using fresh oil and clean utensils.
- 35%** believe that frozen snacks are manufactured using good-quality ingredients.
- 50%** believe it is a misconception that frozen snacks have preservatives.
- 56%** believe that Indian consumers are not aware that frozen snacks are preservative-free.
- 35%** believe that manufacturing brands should talk about how frozen snacks are preservative-free.

## TECHNOLOGY (T)

### CONSUMERS:

- 51%** of Indians have at least heard or read about the IQF (Individual Quick Freezing) Method – a very crucial technology used to safeguard the quality of frozen snack foods.
- 72%** of Indians prefer frozen snacks because they can be easily heated or microwaved as opposed to frying.
- 68%** are aware of the specific microwave settings required for each frozen snacking item.

### HEALTH PROFESSIONALS:

- 33%** of Indians believe that Frozen Snacks are safe to microwave and consume.
- 27%** believe that IQF technology preserves food quality.



## EASE (E)

### CONSUMERS:

- 69%** believe that Frozen Snacks have led to a reduction in the dependency on housemaids.
- 71%** of Indians believe that men have taken to cooking because of the convenience offered by Frozen Snacks.
- 65%** believe that there is no specific timing for Frozen Snacks. They can be consumed anytime.
- 59%** parents believe that Frozen Snacks are a convenient fix for hungry children.
- 57%** of Indians believe Frozen Snacks makes it convenient as their lifestyle does not give them time to cook.
- 55%** believe that frozen snacks are easily available.
- 53%** of Indians find the consumption of frozen snacks faster than regular meals cooked at home.
- 34%** believe it is a cheaper alternative due to rising food prices and inflation.
- 33%** believe it is made by trusted brands.

### HEALTH PROFESSIONALS:

- 74%** believe that there has been an increase in snacking frequency.
- 67%** believe that frozen snacks are fast and more convenient than cooking meals at home.
- 52%** believe that it is easily available.

## TASTE (T)

### CONSUMERS:

- 51%** of Indians believe that Frozen Snacks snacks are very tasty and delicious.
- 44%** of Indians believe that Frozen Snacks offer a restaurant-like taste.

### HEALTH PROFESSIONALS:

- 48%** believe that frozen snacks are very tasty and crispy.
- 41%** believe that Frozen Snacks offer a restaurant-like taste.

## MOOD UPLIFTER (M): BEYOND SATIATING HUNGER

### CONSUMERS:

- 67%** of average Indians consume Frozen Snacks depending on their mood or emotional state.
- 41%** believe that today's Indian households have reasons to celebrate at home.

### HEALTH PROFESSIONALS:

- 46%** believe that frozen snacks come to the rescue during mood swings.
- 34%** believe that celebration times get defined by frozen snacks.

# UNDERSTANDING THE FROZEN SNACKS CATEGORY

## North Indian:

Mathri, Khasta  
Kachori,  
Dhokla, etc

## South Indian:

Murukku, Banana  
Chips, Appalam  
Dahi Puri, etc

## Western:

Fafda, Thepla,  
Ghatiya, etc

## Eastern:

Jhal Muri, Ghugni,  
Nimki, etc

## Papad & Fryums:

Plain Papad, Masala  
Papad, Fryums, etc

## Fried Snacks:

Samosas, Pakoras, Vadas,  
Kachoris, Aloo Tikki, etc

## Namkeens:

Sev, Bhujia, Chivda,  
Farsaan, Chanachur, etc

## Mixes:

Dry fruit Chivda,  
Navratan Mix,  
Mixture, etc

## Chaats:

Pani Puri, Bhel  
Puri, Sev Puri,  
Dahi Puri, etc

## Cakes & Baked Goods:

Muffins, Tea Cakes, Swiss  
Rolls, Rusk & Breadsticks, etc

## Chips & Extruded Snacks:

Potato Chips, Banana Chips,  
Corn Chips, Tortilla Chips,  
Nachos, Cheese Balls, etc

## Biscuits & Cookies: Sweet:

Cream biscuits, Digestive, Marie,  
Glucose, Khari, Crackers, etc

## *Packaged & Processed Snacks*

# *Frozen Snacks*





### ***Traditional & Regional Snacks***



### ***Vegetarians***

Samosas, Parathas, Paneer Tikka, Aloo Tikki, Mozzarella Sticks, French Fries, Onion Rings, Spring Rolls, etc.

### ***Non-Vegetarians***

Chicken Nuggets, Fish Fingers, Kebabs (Seekh, Shami), Fish/Chicken Popcorn, etc.

### ***Low calorie:***

Baked Chips, Low-fat Crackers, Popcorn (air-popped)

### ***Dietary & Specialty Snacks:***

Gluten-free, Keto, Low-sugar options Immunity-boosting snacks (with turmeric, amla, etc.)

### ***Superfoods Dry Fruits:***

Almonds, Cashews, Walnuts, Raisins Nuts & Seeds, Trail Mixes, Makhana Seed Mixes Bars, Protein Bars, Energy Bars, Granola Bars, etc

### ***Health & Wellness Snacks***









# INDIA'S SNACKING STYLE



## ***Consumption Pattern***

### ***Preferred types of Frozen Snacks***

Before we examine the driving pillars of India's snacking industry – **STTEM (Safety, Technology, Taste, Ease, and Mood Uplifter)**, it will be a good idea to first understand the consumption preferences.

This section focuses on how India consumes Frozen Snacks and the ever-evolving lifestyle factors that play a role in increasing the consumer mind space for this category.

### ***Consumption Preferences***

This year's study has revealed that the smaller Indian cities are shaping India's snacking consumption behavior across various parameters.

STTEM 2.0 findings show that at a pan-India level, India's dependency on Frozen Snacks as meals, mini-meals, fillers, lunch box items, and even mood uplifters has become even more prominent. So much so, that there are various reasons or occasions when we consume Frozen Snacks! Ranging from parties, study time, watching OTT or television, romantic dates, and much more.

First, let us understand the increasing role and importance of Frozen Snacks in our daily lives:

### Frozen Snacks are now part of intermittent meals

1 out of 2 Indians (53%) declared that Frozen Snacks have replaced their square meals and are now part of their intermittent meals.

All India		
Agree : 53	Disagree : 34	No opinion either way : 13

	Age					Gender		Marital status	
	18-25	26-30	31-35	36-40	41-45	Male	Female	Single	Married
Agree	50	57	56	53	52	53	54	47	58
Disagree	35	33	32	37	33	35	33	38	31
No opinion either way	15	11	12	10	16	12	13	15	11

	Cities																Regions			
	Mumbai	Pune	Ahmedabad	Jaipur	Bhopal	Delhi NCR	Lucknow	Amritsar	Chandigarh	Kolkata	Patna	Bhubaneswar	Chennai	Hyderabad	Bangalore	Kochi	West	North	East	South
Agree	53	42	49	52	49	57	53	58	52	50	50	56	57	54	55	47	50	56	51	55
Disagree	35	38	36	39	40	32	35	22	32	35	36	32	34	30	31	42	37	31	35	33
No opinion either way	12	20	15	9	11	11	12	20	17	15	14	12	10	16	13	12	13	13	14	12

\*The values are in percentage (%).

The 26-35 years cluster resonated relatively more, with 57% of their respondents agreeing with this. In terms of marital status, 47% of singletons and 58% of the married base agreed with this observation.

North and South India agreed more, with 56% and 55% vote share. From North India, cities like Amritsar, Delhi NCR and Lucknow led the vote share. In South, Chennai and Bangalore led the scores with 57 % and 55% vote shares respectively.





### Other associations with the term Frozen Snacks

In terms of types of consumption, various descriptives were attributed by the respondents to the term Frozen Snacks such as Heavy Snacks, Fillers, Mini meals, Full meals, etc. 39% of all respondents referred to it in the context of Heavy Snacks. Fillers as a descriptive got a vote share of 23%. Interestingly, mini and full meals got vote shares of 40% and 38% respectively. Starters/Appetizers received 45% vote share.

All India		
Heavy snacks : 39	Mini meals : 40	Starters/Appetizers : 45
Fillers : 23	Full meals : 38	Others : 5

	Age					Gender		Marital status	
	18-25	26-30	31-35	36-40	41-45	Male	Female	Single	Married
Heavy snacks	38	40	41	41	36	38	41	38	40
Fillers	18	23	23	35	26	22	23	19	26
Mini meals	36	42	40	49	48	39	42	36	44
Full meals	37	39	40	39	25	40	36	34	41
Starters/Appetizers	38	45	52	54	47	42	49	40	49
Others	6	5	4	4	3	6	5	6	5

Cities																	Regions			
	Mumbai	Pune	Ahmedabad	Jaipur	Bhopal	Delhi NCR	Lucknow	Amritsar	Chandigarh	Kolkata	Patna	Bhubaneswar	Chennai	Hyderabad	Bangalore	Kochi	West	North	East	South
Heavy snacks	44	33	34	33	36	44	35	56	34	44	37	32	37	29	40	31	39	43	41	36
Fillers	25	19	17	17	23	29	20	19	17	24	18	15	22	17	32	22	22	25	21	23
Mini meals	43	45	40	47	46	43	44	51	40	45	40	38	26	31	38	51	44	43	43	32
Full meals	43	32	33	33	44	42	44	40	32	44	45	44	35	27	41	38	34	41	44	35
Starters/ Appetizers	54	37	40	37	39	52	38	29	56	47	23	31	45	54	54	23	45	47	41	47
Others	4	6	5	4	14	4	6	3	3	5	3	1	8	7	4	5	6	4	4	6

\*The values are in percentage (%).

Gender-wise, the association of Frozen Snacks with Mini meals was higher among women (42%) as compared to men (39%). Full meals, on the other hand, got a higher share from men (40%). Heavy Snacking and Appetizers (49%) was stronger amongst women. Marital status wise, both the married and unmarried associated Frozen Snacks higher with “heavy snacking” (38-40%) and Starters/Appetizers (40-49%).

City-wise, Amritsar ranked top with 56% of its residents associating Frozen Snacks with heavy snacking. Bangalore scored the highest for its association with fillers whereas Chandigarh topped with 56% share for its association of Frozen Snacks with Starters/Appetizers.





### Preference for Frozen Snacks on the rise

The popularity of Frozen Snacks has climbed the charts! When compared to the findings from the previous study conducted in 2022 (when 55% Indians preferred ordering from restaurants), this year's study shows a reduction to 52% in the same parameter - a dip of 3 percentage points. This certainly could be an indicator that consumer's dependency for outside food has reduced. Which is why, the preference for Frozen Snacks increased to 48% as compared to 45% two years back.

52% of the married respondents preferred frozen (ready to cook) food as compared to 44% from the unmarried category.

All India																				
Frozen Snacks/ ready to cook foods : 48										Ordering from a restaurant : 52										
Age										Gender		Marital status								
	18-25	26-30	31-35	36-40	41-45	Male	Female	Single	Married											
Frozen Snacks/ ready to cook foods	47	49	50	50	47	48	49	44	52											
Ordering from a restaurant	53	51	50	50	53	52	51	56	49											
Cities																Regions				
	Mumbai	Pune	Ahmedabad	Jaipur	Bhopal	Delhi NCR	Lucknow	Amritsar	Chandigarh	Kolkata	Patna	Bhubaneswar	Chennai	Hyderabad	Bangalore	Kochi	West	North	East	South
Frozen Snacks/ ready to cook foods	50	40	54	42	60	45	40	67	39	54	61	38	49	46	40	51	49	46	52	47
Ordering from a restaurant	50	60	46	58	40	55	60	33	61	46	39	62	51	54	60	49	51	54	48	53

\*The values are in percentage (%).

The 31-40 year group showed a stronger preference for Frozen Snacks with a relatively higher vote share of 50%. Across cities, Amritsar came out strongest with 67% voting for Frozen Snacks foods followed by Patna with 61% vote share preferring Frozen Snacks over ordering snacks from outside/restaurants.

### Consumption of frozen snacks has witnessed an increase

For more than half of India (53%), snacking quantity has gone up as compared to the previous years! (comparison data)

All India : 53

Age					Gender		Marital status	
18-25	26-30	31-35	36-40	41-45	Male	Female	Single	Married
49	55	53	55	61	52	53	47	57

Cities															Regions				
Mumbai	Pune	Ahmedabad	Jaipur	Bhopal	Delhi NCR	Lucknow	Amritsar	Chandigarh	Kolkata	Patna	Bhubaneswar	Chennai	Hyderabad	Bangalore	Kochi	West	North	East	South
53	51	59	67	59	57	59	73	58	46	56	39	47	40	51	51	56	59	46	47

\*The values are in percentage (%).

While 49% of the 18-25 years voted for this, the 41-45 years group showed a higher resonance with 61% vote share.

In terms of marital status, 57% of married and 47% of singles were in agreement with this finding.

Amritsar showed the highest skew with 73% followed by Jaipur with 67%.





### One-fourth of India snacks atleast once a day!

Almost a quarter of India (23%) consumes snacks once a day. Not just that, 13% of the Indians have them 4-5 times a day!

All India			
4-5 times during the day : 13	Once a day : 23	2-3 times a week : 14	Less often than once a week : 5
2-3 times a day : 20	4-5 times a week : 14	Once a week : 10	

	Age					Gender		Marital status	
	18-25	26-30	31-35	36-40	41-45	Male	Female	Single	Married
4-5 times during the day	11	16	15	14	14	14	13	10	16
2-3 times a day	20	23	20	16	23	21	19	18	22
Once a day	24	20	25	25	11	25	22	27	21
4-5 times a week	18	9	15	13	24	14	15	16	13
2-3 times a week	13	13	15	18	16	14	15	13	15
Once a week	9	13	9	7	12	9	10	10	9
Less often than once a week	5	6	1	8	-	3	6	6	4

Cities																	Regions			
	Mumbai	Pune	Ahmedabad	Jaipur	Bhopal	Delhi NCR	Lucknow	Amritsar	Chandigarh	Kolkata	Patna	Bhubaneswar	Chennai	Hyderabad	Bangalore	Kochi	West	North	East	South
4-5 times during the day	13	11	3	3	17	17	12	9	13	17	16	-	11	19	21	11	10	14	15	15
2-3 times a day	15	20	33	12	20	19	23	20	11	20	23	29	29	19	16	10	19	19	21	22
Once a day	23	9	17	34	21	24	21	28	22	22	32	33	18	20	29	40	21	24	25	23
4-5 times a week	19	15	19	28	14	18	19	9	15	11	9	12	10	13	11	9	19	17	11	11
2-3 times a week	14	10	10	8	13	14	3	29	24	18	14	15	16	15	7	13	12	16	17	14
Once a week	11	17	10	8	11	5	16	5	11	9	7	7	11	11	10	13	11	7	9	11
Less often than once a week	6	15	7	6	4	3	6	-	5	4	-	4	5	2	5	3	7	3	3	4

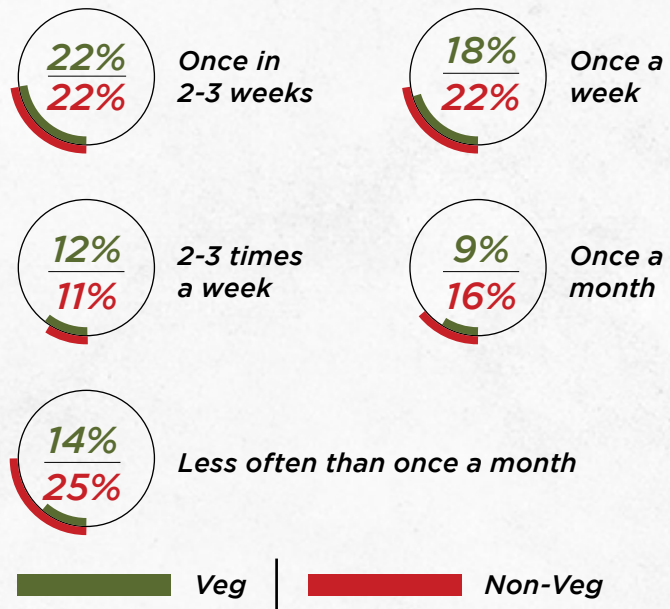
\*The values are in percentage (%).

The 26-35 year age group leads the 4-5 times a day consumption cycle. Gender wise, males are leading the high-frequency consumption of 2-5 times a day with a vote share of 35%. The married Indians are leading the 2-5 times a day snacking trend with a 38% share.

City wise, Chennai leads the pack with 40% of its residents snacking 2-5 times a day! Close on its heels is Patna with 39%. Jaipur showed the lowest with just 16% of its residents snacking 2-5 times a day.



**Health professionals recommend the following frequency of snacking:**



This data above becomes even more relevant when we consider the fact that off late, health experts have been increasingly stressing on the need for increasing protein consumption by Indians. Frequency of protein-based snacks can come in handy to address the rolling prescribed protein requirements for a human body.



### Frequency of Frozen Snacks consumption increased as compared to the previous years!

4 out of 5 Indians (79%) unanimously agree that their snacking frequency has increased over the last few years. Age group wise, the 31-35 years and 41-45 years brackets added weightage to this finding by giving a vote share of 82% and 83% respectively.

All India																					
Yes, it has increased : 79					Yes, it has decreased : 11					No change : 10											
		Age										Gender				Marital status					
		18-25	26-30	31-35	36-40	41-45	Male	Female	Single	Married											
Yes, it has increased		76	79	82	79	83	79	79	74	82											
Yes, it has decreased		13	13	9	8	2	10	13	14	9											
No, no change		11	8	9	13	16	12	9	12	9											
		Cities																Regions			
		Mumbai	Pune	Ahmedabad	Jaipur	Bhopal	Delhi NCR	Lucknow	Amritsar	Chandigarh	Kolkata	Patna	Bhubaneswar	Chennai	Hyderabad	Bangalore	Kochi	West	North	East	South
Yes, it has increased		78	18	77	33	70	80	78	81	83	77	80	77	80	76	78	78	78	80	77	79
Yes, it has decreased		9	6	12	10	15	11	8	16	5	12	13	14	13	11	12	11	10	10	13	12
No, no change		13	16	11	6	15	9	14	3	12	12	4	10	7	13	13	11	12	10	10	9

\*The values are in percentage (%).

Jaipur and Chandigarh topped amongst cities with 84% and 83% shares respectively. Bhopal trailed at the end with just 70% vote share.



#### Health professionals speak:

74% of the health professionals agreed that there has been an increase in India's snacking frequency. Women professionals endorsed this more with 79% share as compared to men with 70%.

#### **Frozen Snacks are a must for any kind of party**

More than half of India (56%) agreed that Frozen Snacks are a must have for parties.

#### **All India**

**Agree: 56**

	Age					Gender		Marital status	
	18-25	26-30	31-35	36-40	41-45	Male	Female	Single	Married
<b>Agree</b>	52	54	62	60	53	53	59	50	60

	Cities																Regions			
	Mumbai	Pune	Ahmedabad	Jaipur	Bhopal	Delhi NCR	Lucknow	Amritsar	Chandigarh	Kolkata	Patna	Bhubaneswar	Chennai	Hyderabad	Bangalore	Kochi	West	North	East	South
Agree	57	60	57	59	55	57	53	63	61	57	55	46	52	52	60	47	58	57	55	53

\*The values are in percentage (%).

Women resonated more with 59% share. Single and Married respondents secured 50% and 60% share respectively. Amritsar (63%) and Chandigarh (61%) turned out to be the snacking capital of India during parties. Amongst southern cities, Bangalore scored close to northern cities with 60% vote share.







### Early evening is the preferred time of the day for Snacking

For half of India, the most preferred time of day for Frozen Snacks consumption turned out to be early evening. This was followed by a quarter (23%) of the Indians preferring to snack between breakfast and lunch. An equal vote share of around 13% was also received for snacking in the morning/with breakfast and with dinner.

All India		
Morning with breakfast: 13	Early Evening: 50	Early Evening: 10
In between breakfast and lunch during the day: 23	With dinner at night: 12	

	Age					Gender		Marital status	
	18-25	26-30	31-35	36-40	41-45	Male	Female	Single	Married
Morning with breakfast	15	11	14	12	15	16	11	12	14
In between breakfast and lunch during the day	23	23	22	20	24	23	22	23	22
Early Evening	45	52	51	56	56	45	55	49	50
With dinner at night	13	11	12	9	6	13	10	11	12
Mid night or later	3	3	2	2	-	3	2	4	1



Cities																	Regions			
	Mumbai	Pune	Ahmedabad	Jaipur	Bhopal	Delhi NCR	Lucknow	Amritsar	Chandigarh	Kolkata	Patna	Bhubaneswar	Chennai	Hyderabad	Bangalore	Kochi	West	North	East	South
Morning with breakfast	13	6	18	25	22	15	12	15	8	77	20	17	13	7	8	7	15	14	15	10
In between breakfast and lunch during the day	23	29	29	27	33	21	22	17	22	12	24	24	23	17	21	18	26	21	22	21
Early Evening	49	42	41	32	27	50	48	60	56	12	52	52	52	57	58	54	42	51	53	55
With dinner at night	13	21	9	15	12	10	16	9	8	12	13	6	11	15	12	17	14	11	9	12
Mid night or later	3	2	3	1	6	5	2		3	12	5	2	1	4	1	5	3	4	2	2

\*The values are in percentage (%).

As compared to women, Frozen Snacks consumption in the morning and with dinner saw a higher skew towards men – 16% and 13% respectively. Early evening snacking received greater support from women (55%) as compared to 45% from men.

While the skew towards snacking was spread across various parts of the day, one may note that this data reveals a rise in intermittent snacking.

Snacking between breakfast and lunch received a higher vote share of 23% from married and single respondents. Early evening snacking saw as high as 50% vote share from these two categories.

City-wise, Amritsar showed the highest skew for early evening snacking with 60% of residents voting for it. Bhopal showed the highest preference for snacking in between breakfast and lunch.



### Frozen Snacks – India's crispy snacking barometer

3 out of 4 Indians (77%) prefer Frozen Snacks that are crispy. Additionally, 51% of Indians love crispy fried chicken.

All India																				
Agree: 77					Disagree: 14					No opinion either way: 8										
	Age										Gender		Marital status							
	18-25	26-30	31-35	36-40	41-45	Male	Female	Single	Married											
Agree	72	81	79	87	87	74	81	73	81											
Disagree	18	11	13	8	8	17	11	17	12											
No opinion either way	10	8	8	5	7	8	8	11	7											
	Cities																Regions			
	Mumbai	Pune	Ahmedabad	Jaipur	Bhopal	Delhi NCR	Lucknow	Amritsar	Chandigarh	Kolkata	Patna	Bhubaneshwar	Chennai	Hyderabad	Bangalore	Kochi	West	North	East	South
Agree	78	73	72	76	71	78	69	78	76	80	70	67	82	74	87	77	75	77	77	81
Disagree	15	14	15	17	23	13	22	22	15	12	21	19	12	16	6	9	16	15	14	11
No opinion either way	8	13	13	7	6	9	9	2	9	8	8	14	7	13	7	13	9	8	9	8

\*The values are in percentage (%).

This preference seemed more prominent within the 41-45 year age group with an 87% share. Women's demand for crispiness was higher with 81% share as compared to 74% share from men.

Married consumers were more particular about crispiness with 81% share as compared to 73% share from single consumers.

Bangalore topped with 87% share. Chennai followed with 82% share followed by Kolkata with 80% share..



### Preference for Veg vs. Non-Veg snacks

Half of India (48%) voted for the preference of vegetarian Frozen Snacks, while 22% voted for non-vegetarian snacks.

Close to 30% of Indians consume both vegetarian and non-vegetarian snacks.

All India																					
Veg snacks: 48					Non-veg snacks: 22					I have both: 29											
		Age										Gender				Marital status					
		18-25	26-30	31-35	36-40	41-45	Male		Female		Single		Married								
Veg snacks		51	49	45	47	56	49		48		51		47								
Non-veg snacks		24	22	22	20	21	23		21		23		22								
I have both		25	29	33	34	24	28		30		26		31								
		Cities															Regions				
		Mumbai	Pune	Ahmedabad	Jaipur	Bhopal	Delhi NCR	Lucknow	Amritsar	Chandigarh	Kolkata	Patna	Bhubaneshwar	Chennai	Hyderabad	Bangalore	Kochi	West	North	East	South
Veg snacks		46	50	80	83	69	56	58	69	65	30	64	47	38	33	36	21	59	59	38	35
Non-veg snacks		25	20	8	5	10	18	17	14	14	32	10	23	31	35	23	36	17	16	27	30
I have both		29	30	12	12	21	25	25	21	21	38	26	31	31	32	40	43	23	25	35	35

\*The values are in percentage (%).

Vegetarian snacks saw a skew among the 41-45 year age group with 56% share. Marital status wise, singletons voted the most with 51% share. Jaipur showed the highest with 83% vote share.

Non-vegetarian snacks consumption saw a marginal hike amongst the 18-25 year with a 24% share, whereas the average amongst the other group was around 21%. Marital status-wise, the scores hovered around 22% share. Kochi topped with 36% share and Hyderabad followed with 35% share.







# SAFETY



When it comes to snacks or any form of food for that matter, it is assumed that it will not only be safe from harmful effects but also benefit health. Unfortunately, the Indian consumer is yet to reach that stage of undeterred confidence. Frozen Snacks is one such food category that still needs increased score in consumer confidence.

***This section of the STTEM report focuses on the first letter 'S' that stands for SAFETY.***

What does the consumer think of safety when it comes to Frozen Snacks? What are the Indian consumer's expectations and apprehensions from this food sub-category?

## SUB CHAPTER 1

### *It is a misconception that Frozen snacks contain preservatives*

- More than half of India believes that frozen snacks are safe to consume. 54% Indians busted the myth that frozen snacks contain preservatives. They echoed that frozen snacks do not contain preservatives! The 31-35 years and 41-45 years groups contributed the highest towards clarifying this myth.

All India	
Completely believe: 23	Neither believe nor disbelieve: 26
Somewhat believe: 31	Somewhat disbelieve: 12

	Age					Gender		Marital status	
	18-25	26-30	31-35	36-40	41-45	Male	Female	Single	Married
Completely believe	21	25	25	22	33	23	24	20	25
Somewhat believe	30	31	34	30	25	31	30	29	32
Neither believe nor disbelieve	28	25	25	28	28	27	26	28	25
Somewhat disbelieve	14	12	10	11	13	12	13	14	11

Cities																	Regions			
	Mumbai	Pune	Ahmedabad	Jaipur	Bhopal	Delhi NCR	Lucknow	Amritsar	Chandigarh	Kolkata	Patna	Bhubaneswar	Chennai	Hyderabad	Bangalore	Kochi	West	North	East	South
Completely believe	22	20	24	25	19	20	35	11	27	23	29	24	22	25	29	17	22	22	24	24
Somewhat believe	28	34	31	33	29	30	33	35	22	32	30	28	35	31	31	27	30	30	31	32
Neither believe nor disbelieve	30	30	26	15	33	27	20	31	26	26	23	24	26	29	23	31	27	27	25	26
Somewhat disbelieve	12	11	14	21	15	12	7	15	16	13	14	8	11	9	11	18	14	12	12	11

\*The values are in percentage (%).



- Another data highlights that 35% of Indians believe that brands should talk more and educate consumers that frozen snacks do not contain preservatives.

All India																				
Brands should talk more about how frozen snacks are preservative free: 35																				
	Age					Gender		Marital status												
	18-25	26-30	31-35	36-40	41-45	Male	Female	Single	Married											
Brands should talk more about how frozen snacks are preservative free	34	35	35	38	35	35	36	34	36											
	Cities																Regions			
	Mumbai	Pune	Ahmedabad	Jaipur	Bhopal	Delhi NCR	Lucknow	Amritsar	Chandigarh	Kolkata	Patna	Bhubaneswar	Chennai	Hyderabad	Bangalore	Kochi	West	North	East	South
Brands should talk more about how frozen snacks are preservative free	42	35	34	37	38	37	39	26	23	34	33	33	28	36	39	32	39	35	34	33

\*The values are in percentage (%).



#### Health professionals speak:

50% of India's Health professionals endorsed the view that it is a misconception that Frozen Snacks contain preservatives. 56% of them also stated that people are not aware that frozen snacks are preservatives free.

#### Perceptions around frozen snacks:



It is a misconception that frozen foods/ snacks have preservatives



People are not aware that frozen foods/snacks are preservatives-free



## SUB CHAPTER 2

### Are Frozen Snacks more hygienic than buying readymade snacks from shops?

The advent of preservative-free, Frozen Snacks is a recent phenomenon in India. It seems that this category is gradually becoming popular.

Already, almost a third of India (30%), has started believing that Frozen Snacks are more hygienic than buying from readymade shops. This sentiment echoed the strongest with 32% and 39% vote share in the 26-30 and 36-40 age groups. Married consumers contributed 33% share.

All India									
More hygienic than buying readymade from shop: 30									
Age					Gender		Marital status		
	18-25	26-30	31-35	36-40	41-45	Male	Female	Single	Married
More hygienic than buying readymade from shop	28	32	29	39	27	30	31	27	33

	Cities															Regions				
	Mumbai	Pune	Ahmedabad	Jaipur	Bhopal	Delhi NCR	Lucknow	Amritsar	Chandigarh	Kolkata	Patna	Bhubaneswar	Chennai	Hyderabad	Bangalore	Kochi	West	North	East	South
More hygienic than buying readymade from shop	34	34	26	21	34	34	32	30	27	33	35	23	26	24	36	17	31	32	31	27

\*The values are in percentage (%).



**S**afety

**T**echnology

**T**aste

**E**ase

**M**ood Uplifter

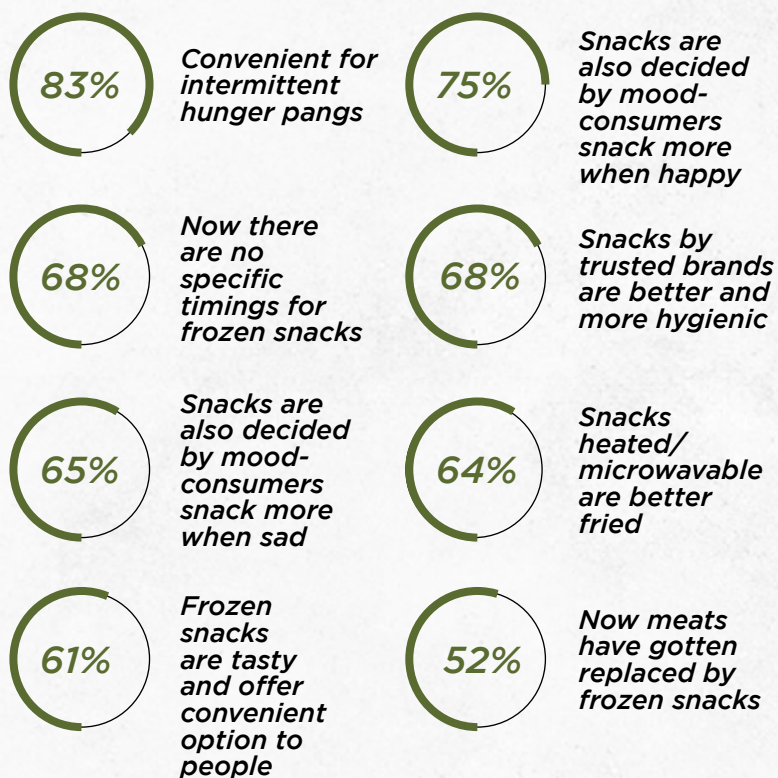


**Health professionals speak:**

**70% of health professionals believe that Frozen Snacks manufactured by trusted brands are hygienic.**

Professionals believe frozen snacks are convenient for hunger pangs. They also recognize the role it plays in uplifting moods of people. Close to 70% also felt snacks made by trusted brands are more hygienic "Ease or convenience" continues to be the top perception they had about this category

**Perceptions about Frozen snacks**



## SUB CHAPTER 3

### How does Brand Trust influence India's Frozen Snacks consumption habits?

To understand this, we asked:

Does India prefer Frozen Snacks manufactured by established or newly launched brands?

2 out of 3 Indians (67%) prefer Frozen Snacks manufactured by reputed or established brands than those that are newly launched. For them, reputation is equated with safety, quality, and value for money.

All India																				
Agree: 67					Disagree: 18					No opinion either way: 15										
Age															Gender		Marital status			
18-25		26-30	31-35	36-40	41-45	Male	Female	Single	Married											
Agree	62	70	71	72	64	67	68	62	71											
Disagree	21	17	15	14	14	19	16	20	16											
No opinion either way	17	13	14	14	22	14	16	18	13											
Cities																	Regions			
Mumbai	Pune	Ahmedabad	Jaipur	Bhopal	Delhi NCR	Lucknow	Amritsar	Chandigarh	Kolkata	Patna	Bhubaneswar	Chennai	Hyderabad	Bangalore	Kochi	West	North	East	South	
Agree	67	62	66	64	64	78	70	71	63	72	60	69	67	53	76	69	66	68	69	67
Disagree	18	16	22	22	17	13	20	24	19	12	29	17	19	27	9	13	19	16	18	18
No opinion either way	14	22	12	13	19	9	10	6	18	16	11	14	14	20	15	18	15	15	15	16

\*The values are in percentage (%).



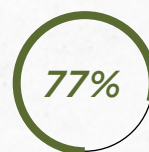
While the 18-25 years and 41-45 years age bands agreed at an average of 63% with this statement, the 26-40 years group showed higher acceptance of 71% share on an average.

Married respondents showed a higher skew of 71% as compared to singletons with 62% vote share.

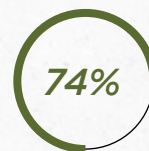
Bangalore topped with 76% and Kolkata followed with 72% share.



**Health professionals speak:**



***New & innovative technology can lead to better & safe frozen snacks manufacturing***



***Brands these days are becoming more careful about the quality of raw materials required in frozen***



***brands these days are becoming more careful about the use of safe & hygienic processes while.***

74% of health professionals recognized that brands are becoming more careful about the quality of raw materials used to produce frozen snacks. Not only that, 73% also highlighted the importance of safe and hygienic manufacturing processes for frozen Snacks.



## SUB CHAPTER 4

*What are some of the healthy tips to cook Frozen Snacks?*

Health professionals recommended how to cook Frozen Snacks foods:



### Healthy way to consume Frozen Snacks

48%

Using less oil in its preparation

45%

Following the instructions on the packet correctly

43%

Cooking it thoroughly

36%

Shallow fry instead of deep fry

28%

Cooking it in the microwave and not on gas



## SUB CHAPTER 5

*What are the safety drivers for the future growth of the Indian Frozen Snacks industry?*



### Safety drivers

41%

Can cook it ourselves using fresh oil and clean vessels

35%

Good quality Ingredients are used

32%

Comes with a best before date

31%

Made by trusted/ established brands

29%

Nutrition value is much higher than fresh food

27%

More hygienic than buying from unbranded food

24%

Regulated products help quality control

20%

Ingredient list enable to safeguard from allergies











The previous discussion of Safety will be incomplete without discussing technology. The future will be about both going hand in hand.

The latter has a huge role to play in fortifying the safety factor of the Frozen Snacks category. The importance of technology goes up even more, given the long assembly line manufacturing and distribution of Frozen Snacks require.

This section deals with consumer's perception and awareness about technology's role in frozen snacks consumption cycle.



## SUB CHAPTER 1

### Is India aware of the Safety Technology used to manufacture Frozen Snacks?

More than two thirds of India (70%) completely and somewhat believe that they are unaware about the role of technology in the manufacture of safe Frozen Snacks. The 41-45 years resonated the maximum with 80% share.

All India									
Completely believe: 32					Neither believe nor disbelieve: 23				
Somewhat believe: 38					Somewhat disbelieve: 6				

Age						Gender		Marital status	
	18-25	26-30	31-35	36-40	41-45	Male	Female	Single	Married
Completely believe	30	34	30	31	35	32	31	31	32
Somewhat believe	38	36	38	38	45	37	39	36	38
Neither believe nor disbelieve	24	23	23	23	14	23	24	25	21
Somewhat disbelieve	7	5	6	6	4	6	6	6	6

Cities																Regions				
	Mumbai	Pune	Ahmedabad	Jaipur	Bhopal	Delhi NCR	Lucknow	Amritsar	Chandigarh	Kolkata	Patna	Bhubaneshwar	Chennai	Hyderabad	Bangalore	Kochi	West	North	East	South
Completely believe	34	23	28	31	30	31	34	18	29	32	31	30	32	32	33	45	31	30	32	34
Somewhat believe	38	41	42	45	33	36	35	47	44	40	41	34	32	36	38	27	39	38	40	34
Neither believe nor disbelieve	22	26	23	18	26	22	27	21	17	21	20	25	27	28	22	24	23	22	21	26
Somewhat disbelieve	5	6	6	6	10	7	3	9	8	5	6	8	7	2	6	5	6	7	6	5

\*The values are in percentage (%).

Men and women both were in sync with 70% share. Married consumers attracted the maximum emotion with 70% share. Jaipur topped with 76% share followed by Chandigarh with 73% share.

## ***SUB CHAPTER 2***

Awareness about IQF (Individual Quick Freeze) technology for Frozen Snacks

***First, what is IQF 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 snacks market, this technological intervention 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 were block freezing of products (or even packaged products), which degraded the overall quality due to its long freezing time. This method of individually quick freezing (IQF) is best done with a flash freezer (blast freezer). Its unique flash freeze technology allows freezing each product and not slowing down 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 is not only frozen completely, but also maintains proper moisture, flavour, and texture.

India is the world's second-largest food producing and processing country 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 Snacks/Refrigeration, and Thermo Processing.

***IQF Technology comes as the answer to all of this!***

All Godrej Yummiez products are frozen with IQF or individual quick freeze 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

We found that more than half of Indians have either heard or read about IQF Technology. Women and men scored an awareness score of 53% and 50% respectively.

All India																					
Yes, have heard or read about it: 51																					
		Age										Gender		Marital status							
		18-25	26-30	31-35	36-40	41-45	Male	Female	Single	Married											
Yes, have heard or read about it		50	55	54	48	54	53	50	44	57											
Cities																	Regions				
		Mumbai	Pune	Ahmedabad	Jaipur	Bhopal	Delhi NCR	Lucknow	Amritsar	Chandigarh	Kolkata	Patna	Bhubaneswar	Chennai	Hyderabad	Bangalore	Kochi	West	North	East	South
Yes, have heard or read about it		47	45	58	54	48	54	68	55	40	58	59	49	48	47	48	42	49	55	57	47

\*The values are in percentage (%).

Patna topped with 59% share followed Kolkata and Ahmedabad with 58% share each.



### Safety quotient of IQF (Individual Quick Freeze)

While 38% Indians believe that IQF Technology is extremely safe, another 44% believe it is 'somewhat' safe. The 26-35 years and 41-45 age groups showed strong involvement with 86% and 89% vote share respectively.

All India																				
Extremely safe: 38										Somewhat safe: 44										
	Age										Gender		Marital status							
	18-25	26-30	31-35	36-40	41-45	Male	Female	Single	Married											
Extremely safe	29	40	44	53	46	36	41	25	47											
Somewhat safe	49	46	43	30	43	46	43	54	39											
	Cities															Regions				
	Mumbai	Pune	Ahmedabad	Jaipur	Bhopal	Delhi NCR	Lucknow	Amritsar	Chandigarh	Kolkata	Patna	Bhubaneshwar	Chennai	Hyderabad	Bangalore	Kochi	West	North	East	South
Extremely safe	45	34	37	33	34	40	50	11	32	34	44	30	41	33	50	33	39	38	35	41
Somewhat safe	37	44	47	54	55	48	32	72	40	49	41	47	39	41	38	41	44	47	48	40

\*The values are in percentage (%).

47% of married respondents voted for the "extremely safe" parameter while 54% of those who are single voted for "somewhat safe".

Bhopal topped with 89% followed by Bangalore and Delhi NCR with 88%.





### ***Use of Microwave during consumption of Frozen Snacks:***

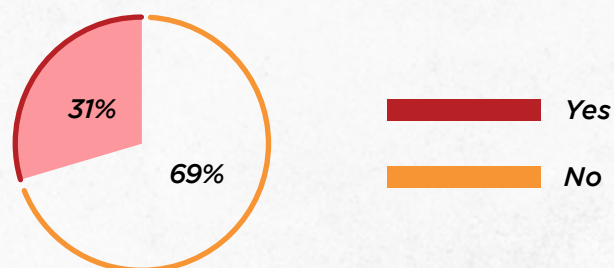
Almost three quarters of India (72%) echoed that they prefer consuming Frozen Snacks that can be heated or microwaved but avoid frying.

#### ***We asked:***

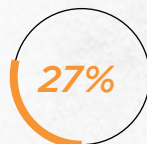
- Is it safe to microwave Frozen Snacks

Close to 70% of Health professionals agreed that it is safe to use microwave for Frozen Snacks preparation.

#### ***Is it safe to microwave Frozen snacks?***



#### ***Health experts speak on the technology factors:***



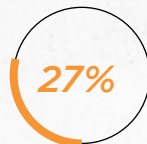
***Food preserved using Individual Quick Freeze (IQF) technology is safe to consume***

***Only 45% professionals were aware about IQF, 54% of them felt it is safe.***

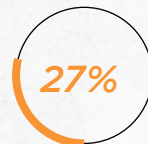


#### ***The role of technology in Snacking***

##### ***IQF awareness***



***Yes, have heard or read about it***



***No, have never heard about it***



#### **DID YOU KNOW?**

- Close to 50% of health professionals felt frozen snacks are better at keeping the nutritional content intact for longer vs. fresh foods, while 45% also recognized the use of technology which helps in retaining the freshness of Frozen Snacks
- Among those health professionals aware about IQF technology, 54% felt it was safe
- 77% health professionals said new & innovative technology could lead to better & safe Frozen Snacks manufacturing







# TASTE



For foodies, taste is the key influencer. In this section, we will focus on the dynamics of taste when it comes to consuming Frozen Snacks.



## SUB CHAPTER 1

What type of snacks does India prefer?

### Frozen Snacks are “Very tasty and delicious”

Half of India (51%) prefer frozen snacks because they are tasty and delicious. The age group of 36-45 years gave higher importance to this factor with 61% share.

All India																				
Very tasty and delicious: 51																				
Age										Gender		Marital status								
	18-25	26-30	31-35	36-40	41-45	Male	Female	Single	Married											
Very tasty and delicious	46	53	52	61	60	49	53	48	54											
Cities																Regions				
	Mumbai	Pune	Ahmedabad	Jaipur	Bhopal	Delhi NCR	Lucknow	Amritsar	Chandigarh	Kolkata	Patna	Bhubaneswar	Chennai	Hyderabad	Bangalore	Kochi	West	North	East	South
Very tasty and delicious	53	55	40	53	58	49	47	59	49	51	44	51	55	42	59	51	52	50	50	53

\*The values are in percentage (%).

Women voted more with 53% share as compared to 48% from men.

54% of married and 48% of unmarried respondents found Frozen Snacks to be “very tasty and delicious”.

Bangalore and Amritsar topped with 59% share followed by Bhopal with 58%.

#### DID YOU KNOW?

- You will be surprised to know that 44% of Indians stated that they found frozen snacks offering restaurant-like taste at home. The 26-30 years and 36-40 years age groups voted the most (48%).
- Bhopal scored the highest amongst cities with 48% while Hyderabad scored the lowest with 32%.

## India prefers healthy Frozen Snacks but not without Taste

Two thirds of India (69%) want healthy Frozen Snacks, however, those which suit their taste buds.

All India																				
Agree: 69		Disagree: 19				No opinion either way: 12														
Age						Gender		Marital status												
	18-25	26-30	31-35	36-40	41-45	Male	Female	Single	Married											
Agree	67	72	70	70	77	69	70	68	70											
Disagree	20	18	20	18	16	21	17	19	18											
No opinion either way	14	10	10	12	7	10	13	12	11											
Cities																Regions				
	Mumbai	Pune	Ahmedabad	Jaipur	Bhopal	Delhi NCR	Lucknow	Amritsar	Chandigarh	Kolkata	Patna	Bhubaneshwar	Chennai	Hyderabad	Bangalore	Kochi	West	North	East	South
Agree	70	63	76	69	65	72	76	73	69	71	69	67	63	71	73	60	69	72	70	67
Disagree	20	20	18	20	22	15	19	18	17	16	19	27	25	16	16	25	20	16	18	21
No opinion either way	11	17	6	11	13	13	5	10	14	13	12	7	12	13	12	15	11	11	12	12

\*The values are in percentage (%).

The 41-45 years age group showed the maximum skew with 77% share. The singletons and married respondents shared an average of 69% share.

Ahmedabad and Lucknow got a vote share of 76% each while Bangalore came second with 73% share.





### Frozen Snacks are tastier than freshly cooked snacks

57% of Indians completely and somewhat prefer Frozen Snacks because they believe it is tastier than freshly cooked snacks. The 41-45 years scored 64% followed by 31-35 years with 61%.

All India																				
Completely believe : 27		Somewhat believe: 30			Neither believe nor disbelieve : 23			Somewhat disbelieve: 12												
	Age					Gender		Marital status												
	18-25	26-30	31-35	36-40	41-45	Male	Female	Single	Married											
Completely believe	23	29	30	26	36	25	28	21	31											
Somewhat believe	30	28	31	30	28	30	29	30	30											
Neither believe nor disbelieve	23	23	23	23	14	22	23	24	22											
Somewhat disbelieve	14	12	10	12	13	13	11	15	10											
Cities								Regions												
	Mumbai	Pune	Ahmedabad	Jaipur	Bhopal	Delhi NCR	Lucknow	Amritsar	Chandigarh	Kolkata	Patna	Bhubaneswar	Chennai	Hyderabad	Bangalore	Kochi	West	North	East	South
Completely believe	26	22	21	28	32	27	41	19	25	25	27	20	28	23	28	29	26	28	25	27
Somewhat believe	23	26	34	33	29	32	27	44	25	30	31	38	35	25	29	23	27	32	31	30
Neither believe nor disbelieve	24	26	21	18	26	21	16	27	18	22	27	20	22	28	24	26	23	21	22	24
Somewhat disbelieve	18	15	14	10	5	11	11	8	19	14	11	12	8	16	11	11	14	12	13	11

\*The values are in percentage (%).

Men and women shared a common 56% share. Married consumers voted the most with 61% share. Lucknow topped with 68% share followed by Chennai with 63% share.

### Preference for Frozen Snacks with authentic Indian flavours

Two thirds of India (74%) prefers Frozen Snacks that come with authentic Indian flavours (e.g Achari, Amritsari, Lucknowi, Murg Malai).

All India																				
Agree: 74					Disagree: 15							No opinion either way: 11								
Age										Gender				Marital status						
	18-25		26-30		31-35		36-40		41-45		Male		Female		Single		Married			
Agree	71		77		72		77		73		74		73		73		75			
Disagree	17		13		16		12		16		16		13		14		15			
No opinion either way	12		11		12		11		12		10		13		13		10			
Cities																Regions				
	Mumbai	Pune	Ahmedabad	Jaipur	Bhopal	Delhi NCR	Lucknow	Amritsar	Chandigarh	Kolkata	Patna	Bhubaneswar	Chennai	Hyderabad	Bangalore	Kochi	West	North	East	South
Agree	75	73	69	77	78	75	70	66	69	76	79	66	72	74	74	74	75	72	75	73
Disagree	12	13	14	14	8	17	20	18	14	12	12	16	19	12	18	12	12	17	13	17
No opinion either way	12	14	17	9	14	8	9	16	17	11	9	18	9	15	9	15	13	10	12	11

\*The values are in percentage (%).

The age group bands covering the 18-45 years range hovered around the average of 74% share. Based on marital status, married respondents and singletons showed a common response with around 74% share.

Patna topped with 79% share followed by Bhopal with 78% share. Jaipur came third with 77% share.





### Preference for International flavors in Frozen Snacks

While the previous section highlighted India's preference for authentic Indian flavours in their Frozen Snacks, close to two-thirds of India (64%) are also open to experimenting with international flavours E.g. Teriyaki, Peri Peri, Wasabi, American Cheese & Onion, Italian, Herb flavor, etc).

All India		
Agree: 64	Disagree: 25	No opinion either way: 11

	Age					Gender		Marital status	
	18-25	26-30	31-35	36-40	41-45	Male	Female	Single	Married
Agree	61	66	65	68	64	63	65	64	65
Disagree	26	26	25	20	16	26	23	24	25
No opinion either way	13	9	9	12	20	10	12	12	11

Cities																	Regions			
	Mumbai	Pune	Ahmedabad	Jaipur	Bhopal	Delhi NCR	Lucknow	Amritsar	Chandigarh	Kolkata	Patna	Bhubaneswar	Chennai	Hyderabad	Bangalore	Kochi	West	North	East	South
Agree	68	58	63	60	63	70	75	63	68	64	62	61	57	53	71	60	64	70	63	60
Disagree	25	28	29	21	31	20	17	31	21	23	32	24	31	30	18	20	26	21	25	27
No opinion either way	7	14	9	19	6	10	8	6	11	12	6	16	12	17	11	19	10	9	12	13

\*The values are in percentage (%).

The 36-40 years age group showed stronger agreement with 68% share. Those married as well as single shared a score of around 65%.

Lucknow scored first with 75% share while Bangalore came second with 71% share.

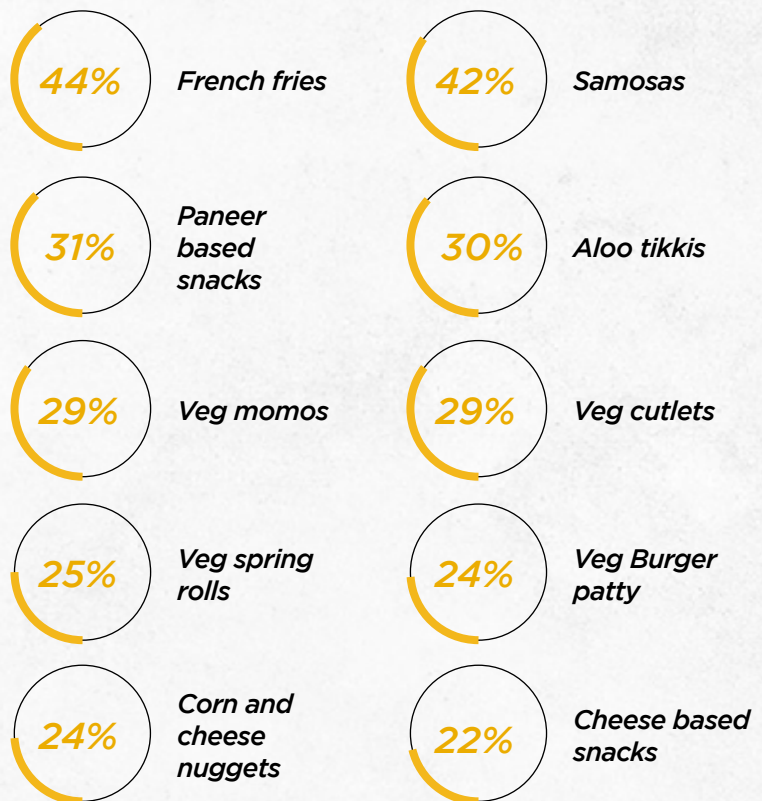
## SUB CHAPTER 2

Types of preferred snacks

### Top 5 most preferred Vegetarian Frozen Snacks - All India:



#### Ranking preference for Veg Frozen Snacksfoods







## French Fries

Ranking at first position, 44% vegetarian frozen snack consumers seek French fries as their most preferred snacking item. With 47% preference share, the age group of 31-40 years emerged as the strongest. Women influenced the score with 47% vote share as compared to 40% from men.

French fries received a vote share of 45% from married and 42% share from single respondents. Ahmedabad topped with 58% share followed by Mumbai with 56% share.

## Samosas

At the second position, 42% vegetarian Indians prefer traditional desi samosas. With 47% share, the 41-45 years band led the race amongst age groups. Men scored more with 46% share as compared to women with 38%.

Based on marital status, 44% of singletons echoed the liking for samosas. Kochi sprung a surprise with 70% residents voting for this desi snack. At the second place was Bhopal 52% resident share.



## Paneer based snacks

At the third position, 31% of vegetarian Indian residents showed preference for paneer-based snacks. 38% of the 41-45 years band led the voting share. Men with 22% share was higher than women with 19% share.

The married category contributed 30% vote share. City wise, Bhubaneshwar led with 43% share very closely followed by 42% share by Jaipur.

## Aloo Tikkis

Aloo Tikkis took the fourth slot with 30% share. The 36-40 years age group voted 34%. Here too, male involvement was slightly higher with 31% share as compared to 29% share from women.

31% of the singletons and 29% of the married category voted for Aloo Tikkis. Amritsar topped with 50% share followed by Lucknow with 37% share.



## Veg momos and Veg cutlets

The fifth one in line with 34% share is Chicken Popcorn. The 18-35 Jointly taking the fifth spot were Veg momos and Veg cutlets with 29% share each.

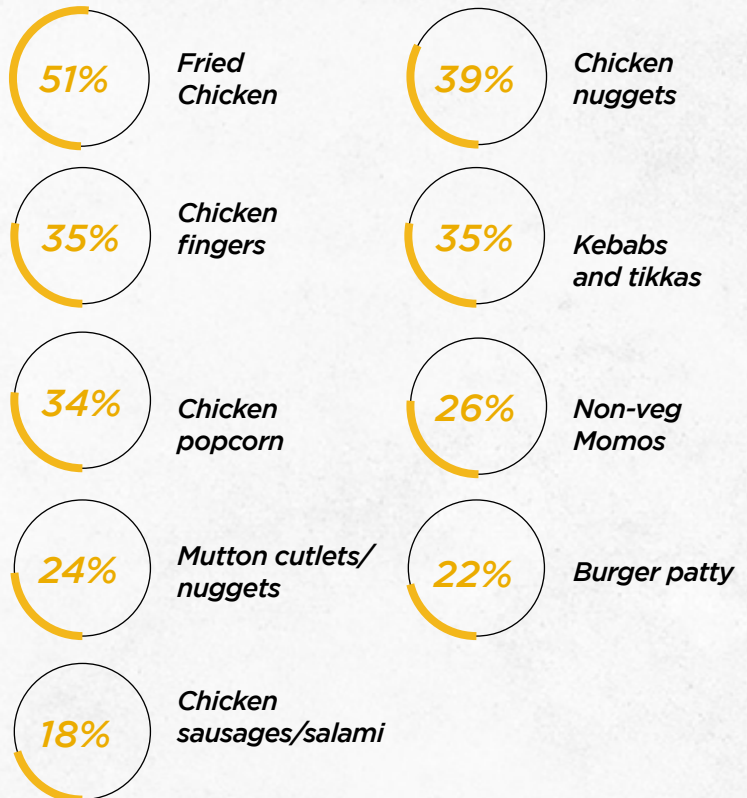
Veg cutlets got highest preference of 36% from the 36-45 years age group. Women showed higher preference over men with 31% share.

The married respondents contributed a 31% share, higher than singletons. Kochi topped with 67% share and Bangalore came second with 42% share. In the veg momos category, the 18-25 years group scored the highest with 35% share. Bhubaneshwar scored the maximum with 51% residents voting for Veg momos. Jointly at the second place were Jaipur and Patna with 46% vote share.

**Top 5 most preferred Non-Vegetarian Frozen Snacks - All India:**



**Ranking preference for Veg Frozen Snacksfoods**







## Fried Chicken

At the first spot is Fried Chicken. Half of the non-vegetarian Indian respondents (51%) have voted fried chicken as their most preferred frozen snack item. The 26-30 years age group voted 55% which was way higher than other groups. Women contributed to a higher share of 52% as compared to 49% from men.

This category received an average vote share of 51% from singletons and married respondents. Kochi with 74% topped followed by 65% from Pune.

## Chicken Nuggets

39% of non-vegetarian Indians prefer Chicken Nuggets. This second most favoured item is liked the most by 26-30 years age group. 47% women showed preference as compared to just 37% men.

Marital status wise, the married respondents contributed the highest with 42% share. Chandigarh topped with 55% vote share.



## Chicken Fingers

At the third spot is Chicken Fingers with 35% share. The 36-45 years age group showed the maximum preference with an average 42% share.

The unmarried and married respondents voted for 33% and 36% vote shares respectively. Bhopal topped with 51% share followed by Lucknow with 48%.

## Kebabs & Tikkas

Jointly sharing the third spot with 35% share, Kebabs & Tikkas get added to the preference list. The 41-45 years age band voted the maximum with 49% share. The younger groups voted an average of 35% share. Men scored 36% share vs women 34%.

Singletons voted 37% and married 34%. Amritsar scored the top with 63% share followed Chandigarh with 59%.



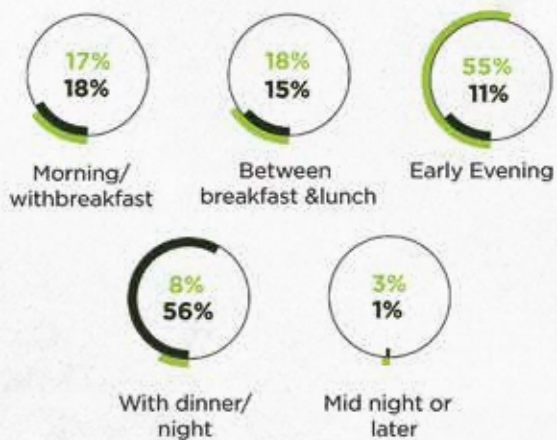
## Chicken Popcorn

The fifth one in line with 34% share is Chicken Popcorn. The 18-35 years band drove the preference score with an average of 35% share. Women showed higher inclination with 37% as compared to men with 32%. An average of 35% of preference was witnessed across the singletons and the married residents. Jaipur topped with 45% share followed by Chennai with 41% share.

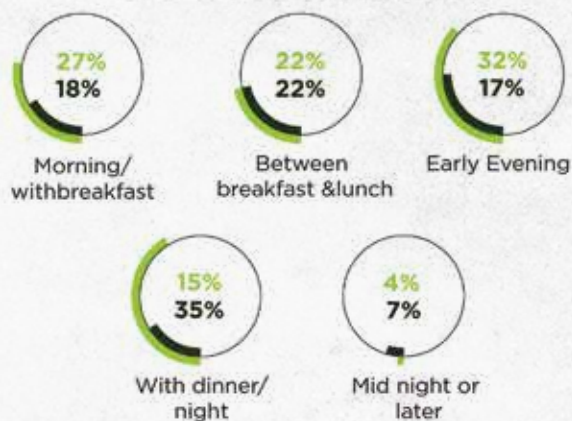
**HEALTH EXPERTS RECOMMEND IDEAL TIME OF DAY TO CONSUME THE ABOVE SNACK ITEMS:**



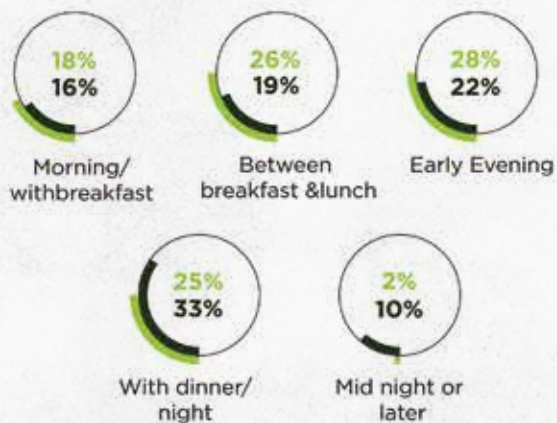
### SAMOSAS



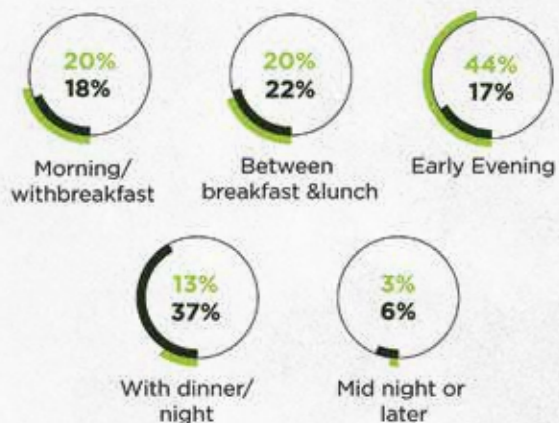
### CHEESE SNACKS



### PANEER SNACKS



### VEG CUTLETS

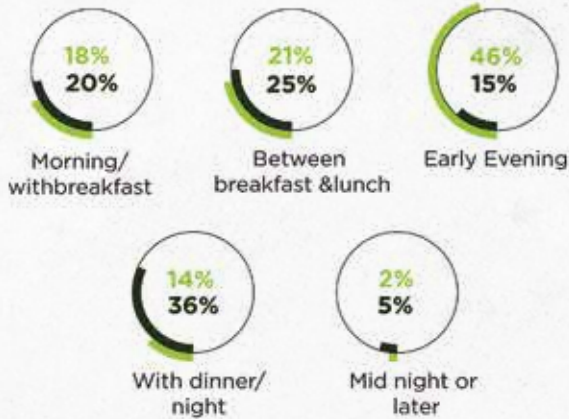


■ Adults ■ Kids

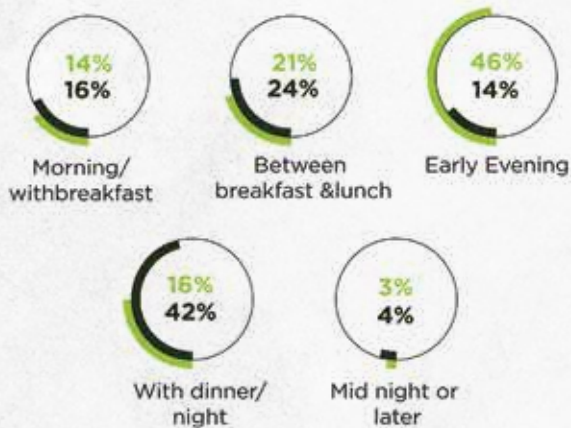




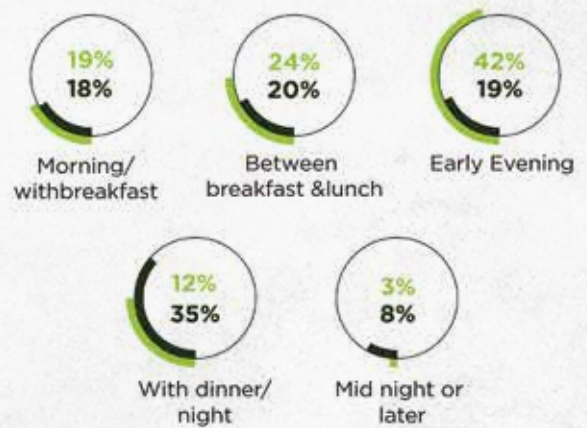
## CORN & CHEESE NUGGETS



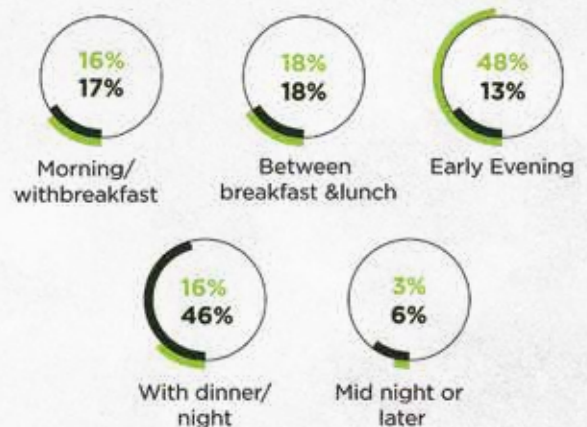
## VEG SPRING ROLLS



## ALOO TIKKIS



## VEG MOMOS

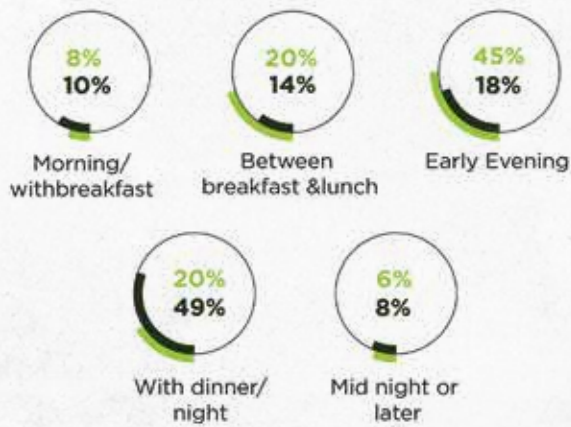


Adults Kids

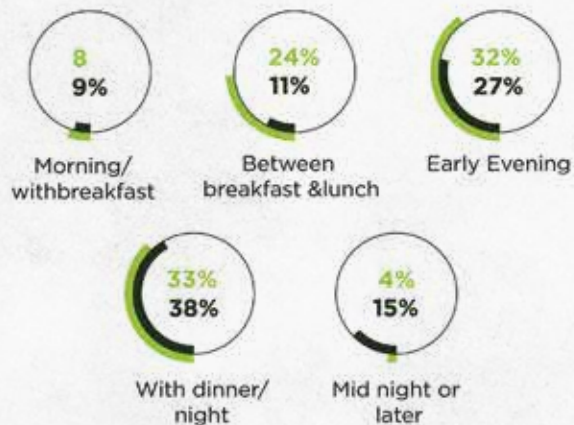




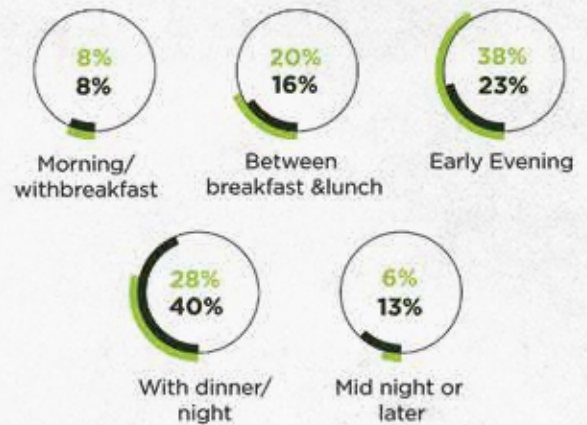
## CHICKEN POPCORN



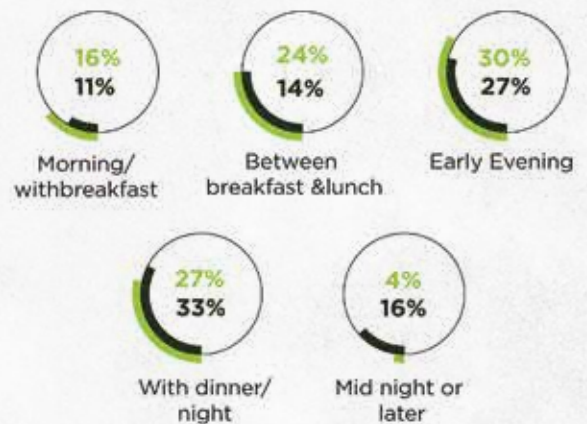
## MUTTON CUTLETS/NUGGETS



## CHICKEN NUGGETS



## CHICKEN SAUSAGES / SALAMI

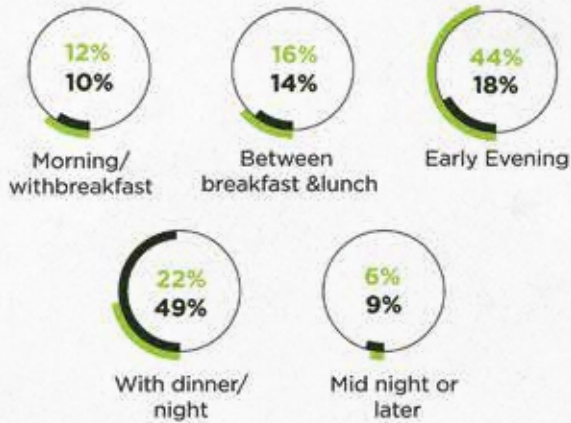


Adults Kids

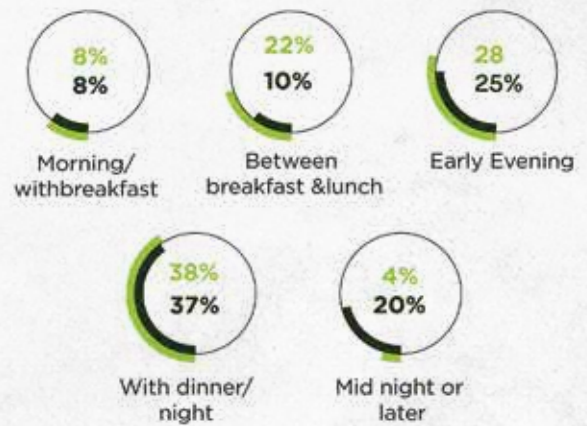




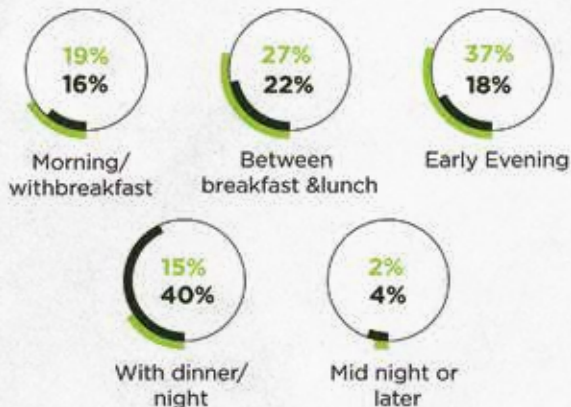
## NON-VEG MOMOS



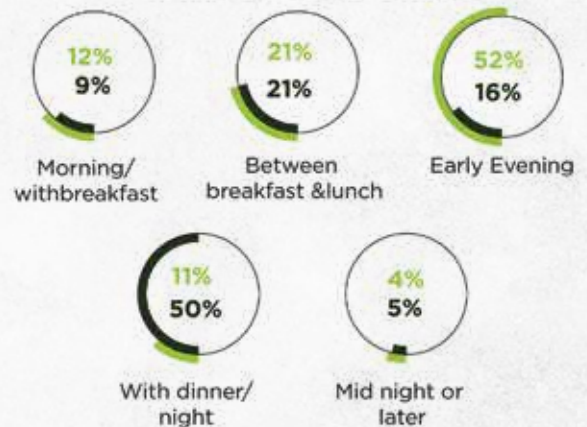
## KEBABS & TIKKAS



## VEG BURGER PATTY



## FRENCH FRIES

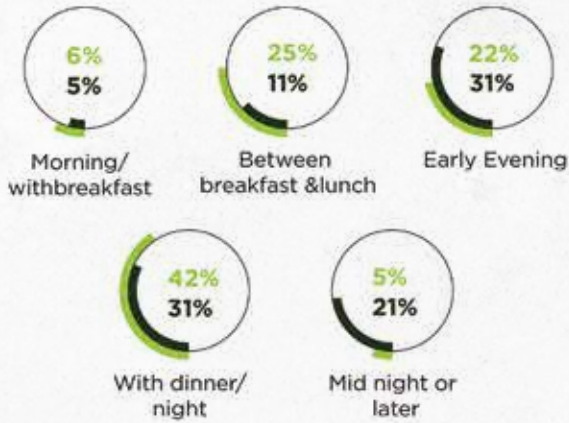


■ Adults
 ■ Kids

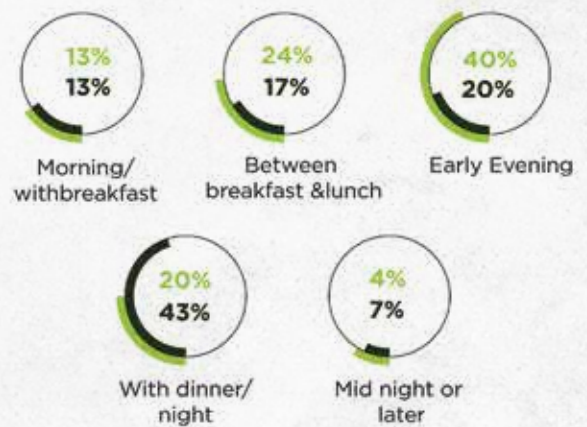




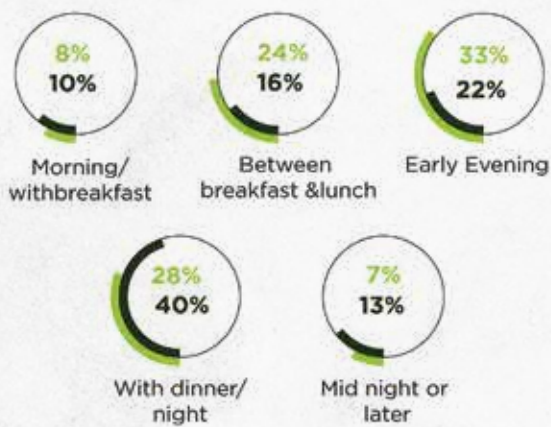
## FRIED CHICKEN



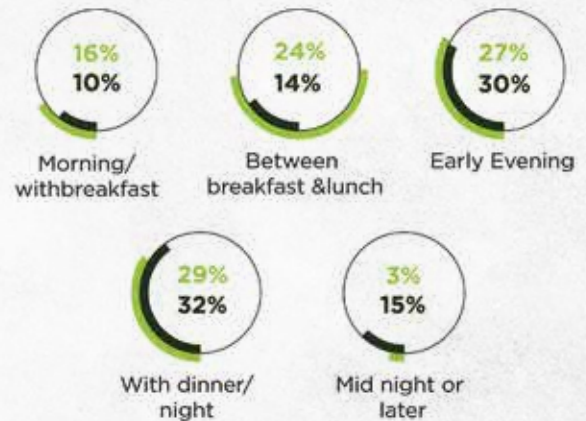
## BURGER PATTY



## CHICKEN FINGERS



## SEAFOOD BASED SNACKS



Adults Kids









Ease or convenience is one of the driving factors for snacking in India. The term “ease” will have various connotations.

For more than half of India (53%), the ease or convenience of cooking light snacks is more than cooking proper or full meals. This resonated the highest amongst the 41-45 years (74%) and 36-40 years (63%). Women respondents showed sharper affinity with 56% votes as compared to 50% coming from men.

Amongst Indian cities, Amritsar, Bangalore and Kochi residents voted the highest (67%) and confirmed the role of “Cooking light Frozen Snacks is faster and easier than meals” as the key factor for increase in snacking frequency

Further, 47% of India voted for this criterion as the second reason due to which snacking frequency has witnessed an increase. The maximum votes (57%) were from the 36-40 years age band.

Women showed a sharp skew with 52% votes as compared to 42% from men.

Bangalore and Kochi topped with equal vote share of 56%. Ahmedabad was close second with 55% share. Bhopal showed the lowest affinity towards this parameter with just 33% votes.



## SUB CHAPTER 1

*What are some of the ease or convenience drivers that are aiding the growth of Frozen Snacks in India?*

### **Frozen Snacks are convenient for small and quick hunger pangs**

4 out of 5 Indians agree that Frozen Snacks are easy and convenient solutions for small and quick cravings.

All India																				
Agree: 81			Disagree: 12				No opinion either way: 7													
Age						Gender		Marital status												
	18-25	26-30	31-35	36-40	41-45	Male	Female	Single	Married											
Agree	76	82	85	83	83	77	84	77	83											
Disagree	15	11	9	10	11	15	10	14	10											
No opinion either way	5	7	5	7	6	8	7	8	7											
Cities									Regions											
	Mumbai	Pune	Ahmedabad	Jaipur	Bhopal	Delhi NCR	Lucknow	Amritsar	Chandigarh	Kolkata	Patna	Bhubaneswar	Chennai	Hyderabad	Bangalore	Kochi	West	North	East	South
Agree	79	78	74	86	82	82	86	83	78	85	83	80	77	71	85	80	79	83	84	78
Disagree	13	13	13	10	14	12	11	15	19	8	12	19	13	15	10	7	13	13	10	12
No opinion either way	9	8	13	4	5	6	3	2	3	8	5	2	10	14	5	13	8	5	6	10

\*The values are in percentage (%).

While 76% of the 18-25 years age group agreed with this, the elder groups showed a higher agreement score of 84%. Women showed a sharper resonance with 84% share while men scored 77%.

Married consumers showed higher affinity with this observation with 83% share. Those who were single scored 77% share..

The residents of Jaipur & Lucknow showed the highest agreement with 86% share while Bangalore scored second with 85% share.

### Lighter on stomach

Another interesting aspect that came up was that 36% Indians have increased snacking because they believe that meals are too heavy and that Frozen Snacks are lighter on stomach. While the 18-25 years age group scored 32%, all the age groups above this, scored around 38% vote share.

While 39% of the women confirmed this, men scored 32%. Those who were single voted 32% vote share while married respondents voted 38%.

Bangalore topped with 45% of their residents voting for this parameter. Lucknow stood second with 43%. Chandigarh showed the lowest participation on this parameter with just 17% share.

### Can be heated/ prepared in a microwave vs. pan-fried/ frying in oil

Three quarters of India (72%) find Frozen Snacks easy to use because it can be prepared in microwave and does not need to be fried.

All India																				
Agree: 72					Disagree: 16					No opinion either way: 11										
	Age										Gender					Marital status				
	18-25	26-30	31-35	36-40	41-45	Male	Female	Single	Married											
Agree	69	74	73	77	68	70	75	68	76											
Disagree	17	15	17	16	19	19	14	17	16											
No opinion either way	14	11	10	7	13	12	11	15	8											
	Cities															Regions				
	Mumbai	Pune	Ahmedabad	Jaipur	Bhopal	Delhi NCR	Lucknow	Amritsar	Chandigarh	Kolkata	Patna	Bhubaneshwar	Chennai	Hyderabad	Bangalore	Kochi	West	North	East	South
Agree	71	76	64	77	64	76	72	71	69	77	68	69	72	61	74	75	71	74	75	71
Disagree	18	14	21	17	18	13	19	24	16	12	23	20	17	22	14	15	18	15	15	17
No opinion either way	10	10	15	6	18	11	10	5	15	11	9	11	11	17	13	10	11	11	10	13

\*The values are in percentage (%).



The 26-40 years age group believed in this more with 75% vote share. 75% of the women voted while men stood at 70% share.

Married respondents voted 76% share and singletons 68%.

Jaipur and Kolkata stood at the top with 77% residents share each, followed by Delhi NCR and Pune with 76% share each.

### **Easily available**

4 out of 5 Indians (83%) consume snacks because of the ease of accessibility and availability they offer.

All India																				
Agree: 83			Disagree: 10				No opinion either way: 6													
Age						Gender		Marital status												
	18-25	26-30	31-35	36-40	41-45	Male	Female	Single	Married											
Agree	79	84	87	87	86	80	87	79	86											
Disagree	13	9	9	7	6	13	8	13	9											
No opinion either way	8	6	5	6	7	7	5	8	5											
Cities																	Regions			
	Mumbai	Pune	Ahmedabad	Jaipur	Bhopal	Delhi NCR	Lucknow	Amritsar	Chandigarh	Kolkata	Patna	Bhubaneshwar	Chennai	Hyderabad	Bangalore	Kochi	West	North	East	South
Agree	86	74	82	87	84	83	84	83	83	85	79	84	84	75	86	85	84	83	84	83
Disagree	9	14	10	8	9	10	9	14	10	9	17	11	10	14	8	8	10	11	11	10
No opinion either way	6	11	7	6	6	7	7	3	7	6	4	5	6	11	6	7	7	6	5	7

\*The values are in percentage (%).

Women showed a stronger skew with 87% share as compared to 80% share from men. Unmarried respondents voted for 79% share whereas married respondents voted 86%.

Jaipur with 87% share topped followed by Mumbai and Bangalore with 86% share each.

### Ease of maintaining the hygiene aspect while cooking

With close to 40% of Indians preferring Frozen Snacks because of the convenience of cooking using their oil and utensils, this is a possible indication of the fact that the consumers yearn for home convenience and hygiene. This sense of personalization resonated the highest within the 36-40 year age group with a 48% share.

#### All India

Agree: 39

	Age					Gender		Marital status	
	18-25	26-30	31-35	36-40	41-45	Male	Female	Single	Married
We can cook it ourselves using our oil and vessels so more control	34	40	41	48	28	35	43	36	41

Cities																					Regions			
	Mumbai	Pune	Ahmedabad	Jaipur	Bhopal	Delhi NCR	Lucknow	Amritsar	Chandigarh	Kolkata	Patna	Bhubaneshwar	Chennai	Hyderabad	Bangalore	Kochi	West	North	East	South				
We can cook it ourselves using our oil and vessels so more control	40	32	34	45	34	40	39	44	38	41	35	32	34	36	44	43	38	40	39	38				

\*The values are in percentage (%).

Women, quite naturally, responded more with 43% share as compared to men with 35% share.

The married respondents echoed more with 41% share as compared to 36% from the unmarried respondent base.

Jaipur topped with 45% followed by Amritsar and Bangalore with 44% each.



### Convenient to cook/fast and quickly ready

Another aspect that consumers shared was that of convenience of fast and quick cooking. Half of India (52%) resonated with this. The 36-40 years age group voted the highest with 61% share, followed by the 26-30 years age group with an average of 56% share.

All India																				
Agree: 52																				
Age						Gender		Marital status												
	18-25	26-30	31-35	36-40	41-45	Male	Female	Single	Married											
Convenient to cook/fast and quickly ready	44	55	57	61	46	48	56	50	54											
Cities									Regions											
	Mumbai	Pune	Ahmedabad	Jaipur	Bhopal	Delhi NCR	Lucknow	Amritsar	Chandigarh	Kolkata	Patna	Bhubaneshwar	Chennai	Hyderabad	Bangalore	Kochi	West	North	East	South
Convenient to cook/fast and quickly ready	57	55	56	53	42	54	45	62	52	50	49	54	47	42	58	56	54	53	51	50

\*The values are in percentage (%).

Women endorsed this more with 56% share as compared to men with 48%. Based on marital status, 54% of the married consumers agreed with this as compared to 50% singletons.

Amritsar scored highest with 62% share followed by Bangalore with 58% share.



### A wide variety to choose from

42% Indians believe that Frozen Snacks offer the convenience of a wide variety to choose from. The 26-45 years age band showed an average vote share of 44%.

All India																				
Agree: 42																				
Age						Gender		Marital status												
	18-25	26-30	31-35	36-40	41-45	Male	Female	Single	Married											
High variety and different kinds of items	39	45	44	46	42	40	45	39	45											
Cities									Regions											
	Mumbai	Pune	Ahmedabad	Jaipur	Bhopal	Delhi NCR	Lucknow	Amritsar	Chandigarh	Kolkata	Patna	Bhubaneshwar	Chennai	Hyderabad	Bangalore	Kochi	West	North	East	South
High variety and different kinds of items	41	35	35	38	40	49	46	42	42	43	37	41	38	37	55	40	39	47	42	43

\*The values are in percentage (%).

Women agreed more with 45% share as compared to men with 40%. Married respondents agreed the highest with 45% share. Bangalore scored the highest with 55% share followed by Delhi NCR with 49% share.





As an extension of the above finding, the variety parameter also makes it easy for consumers to have different Frozen Snacks each day. Well, variety seems the essence of well over half (59%) Indian consumer's snacking life. They prefer to have ease or convenience of variety each day.

All India																				
Agree: 59			Disagree: 27				No opinion either way: 13													
Age						Gender		Marital status												
	18-25	26-30	31-35	36-40	41-45	Male	Female	Single	Married											
Agree	53	65	63	62	60	58	60	52	65											
Disagree	32	24	25	23	28	29	26	33	23											
No opinion either way	15	11	12	15	12	13	13	15	12											
Cities																	Regions			
	Mumbai	Pune	Ahmedabad	Jaipur	Bhopal	Delhi NCR	Lucknow	Amritsar	Chandigarh	Kolkata	Patna	Bhubaneswar	Chennai	Hyderabad	Bangalore	Kochi	West	North	East	South
Agree	56	48	64	52	53	59	67	78	52	62	63	56	58	58	64	60	55	62	61	60
Disagree	32	30	24	36	22	26	22	16	34	23	25	30	32	28	23	33	30	25	24	29
No opinion either way	11	21	13	12	25	15	11	6	15	16	12	14	11	14	12	7	15	13	15	11

\*The values are in percentage (%).

Age group wise, 26-30 years came out the strongest with 65% share. Based on marital status, 52% unmarried and 65% of married respondents voted for variety in the Frozen Snacks category.

Amritsar agreed the most with 78% share while Lucknow came a distant second with 67% share.

### Liked by all age groups - children and adults

44% Indians prefer Frozen Snacks because it is liked by all age groups - children and adults. This emotion was supported the strongest by the 36-40 years age group with 59% share. Women showed higher affinity to this finding with 48% share as compared to 39% men.

#### All India

Agree: 44

	Age					Gender		Marital status	
	18-25	26-30	31-35	36-40	41-45	Male	Female	Single	Married
Liked by children/family members	36	44	47	59	51	39	48	36	50

Cities																	Regions			
	Mumbai	Pune	Ahmedabad	Jaipur	Bhopal	Delhi NCR	Lucknow	Amritsar	Chandigarh	Kolkata	Patna	Bhubaneswar	Chennai	Hyderabad	Bangalore	Kochi	West	North	East	South
Liked by children/ family members	44	39	38	36	37	46	39	50	42	46	36	36	41	43	52	54	41	45	43	45

\*The values are in percentage (%).

Married consumers showed the highest degree of agreement with 50% vote share. Kochi scored the highest with 54% share followed by Bangalore with 52% share.





### High quantity can serve many

One third of India (33%) believes that the quantity of Frozen Snacks in each packaging is sufficient to serve many. The 36-40 years age group resonated the maximum with 41% share.

All India																				
Agree: 33																				
Age						Gender		Marital status												
	18-25	26-30	31-35	36-40	41-45	Male	Female	Single	Married											
High quantity, can serve many	27	35	35	41	36	31	35	26	38											
Cities																Regions				
	Mumbai	Pune	Ahmedabad	Jaipur	Bhopal	Delhi NCR	Lucknow	Amritsar	Chandigarh	Kolkata	Patna	Bhubaneswar	Chennai	Hyderabad	Bangalore	Kochi	West	North	East	South
High quantity, can serve many	29	29	35	33	40	36	33	38	29	32	33	19	33	31	41	25	32	35	30	34

\*The values are in percentage (%).

Women contributed to a share of 35% as compared to 31% from men.

Married consumers scored more with 38% as compared to 26% from those who are single

Bhopal topped with a score of 41% share followed by Bangalore with 40%.

## SUB CHAPTER 2

**Do Frozen Snacks ease financial pressure and take care of rising prices or inflation?**

### **Cheaper compared to the rising prices of food items & groceries**

Fluctuations in inflation rates have often influenced the consumption trends of Indians across food categories. Inflation in the grocery and vegetable categories has made households rethink and review their food expenses.

For some Indian consumers (28%), the aspect of frozen snacks being cheaper, compared to the rising prices of food items and groceries, plays an important role. The 26 to 30 and 36 to 40 years age groups showed higher vote share of 35% and 41% respectively.

All India																				
Agree: 28																				
Cheaper compared to the rising prices of food items & grocerie	Age					Gender		Marital status												
	18-25	26-30	31-35	36-40	41-45	Male	Female	Single	Married											
	27	31	26	29	26	28	28	27	29											
Cities								Regions												
	Mumbai	Pune	Ahmedabad	Jaipur	Bhopal	Delhi NCR	Lucknow	Amritsar	Chandigarh	Kolkata	Patna	Bhubaneshwar	Chennai	Hyderabad	Bangalore	Kochi	West	North	East	South
Cheaper compared to the rising prices of food items & groceries	27	26	36	28	36	28	36	30	24	27	29	25	27	21	32	26	29	29	27	27

\*The values are in percentage (%).

The single and married consumers contributed a share of 28% on average. Ahmedabad, Bhopal and Lucknow together topped with 36% share each.



### Cheaper compared to restaurant food

One third India (36%), find the option of Frozen Snacks conveniently economical or cheaper as compared to ordering from restaurants. The 36-40 years group resonated the maximum with 42% share.

Men showed higher affinity with 38% share as compared to 34% from women.

All India																				
Agree: 36																				
Cheaper compared to restaurant food	Age					Gender		Marital status												
	18-25	26-30	31-35	36-40	41-45	Male	Female	Single	Married											
	35	38	32	42	37	38	34	35	37											
Cities																Regions				
Cheaper compared to restaurant food	Mumbai	Pune	Ahmedabad	Jaipur	Bhopal	Delhi NCR	Lucknow	Amritsar	Chandigarh	Kolkata	Patna	Bhubaneshwar	Chennai	Hyderabad	Bangalore	Kochi	West	North	East	South
	42	21	37	25	41	34	34	41	44	37	38	29	35	32	41	41	36	36	36	37

\*The values are in percentage (%).

Married and single consumers voted an average of 36% share. Chandigarh topped with 44% share followed by Mumbai with 42% share.

### Convenient for households that don't have maids or cooks

Close to 40% Indians agree that Frozen Snacks are a wonderful respite for those households that do not have maids or cooks. The 31-35 years age group agreed the maximum with 46% share.

All India																				
Disagree: 24		Neither Agree nor Disagree: 34				Agree: 39		Don't know: 4												
Age						Gender		Marital status												
	18-25	26-30	31-35	36-40	41-45	Male	Female	Single	Married											
Disagree	24	24	22	26	25	22	26	26	23											
Neither Agree nor Disagree	35	35	29	33	38	36	31	36	32											
Agree	37	38	46	37	32	39	38	34	42											
Don't know	4	3	3	4	5	3	4	4	3											
Cities																	Regions			
	Mumbai	Pune	Ahmedabad	Jaipur	Bhopal	Delhi NCR	Lucknow	Amritsar	Chandigarh	Kolkata	Patna	Bhubaneshwar	Chennai	Hyderabad	Bangalore	Kochi	West	North	East	South
Disagree	29	22	23	22	29	28	20	30	29	24	18	18	19	22	21	24	26	27	22	20
Neither Agree nor Disagree	30	35	28	35	30	34	29	41	29	32	39	42	38	37	29	39	31	33	34	36
Agree	39	37	40	37	37	35	46	26	38	41	41	35	40	41	47	32	38	36	40	41
Don't know	3	6	10	7	3	3	5	2	3	3	3	5	3	1	2	5	5	3	4	3

\*The values are in percentage (%).

Bangalore topped with 47% share followed by Lucknow with 46% share.





### SUB CHAPTER 3

Are Frozen Snacks encouraging men to get involved in cooking?

#### Involvement of Men in the family, when it comes to the purchase of Frozen Snacks

Men are increasingly getting involved in the purchase and cooking of frozen foods! Below are interesting nuggets of information about India's men in the kitchen when it comes to snacking:

Close to 80% of Indian men are involved in purchase of Frozen Snacks. Highest emotions echoed from the 41-45 years age group with 84% share.

All India																				
Very much involved: 39										Somewhat involved: 39										
Age										Gender					Marital status					
	18-25		26-30		31-35		36-40		41-45		Male		Female			Single		Married		
Very much involved	32		43		45		41		49		42		36			31		45		
Somewhat involved	42		38		37		39		35		41		38			42		38		
	Cities																Regions			
	Mumbai	Pune	Ahmedabad	Jaipur	Bhopal	Delhi NCR	Lucknow	Amritsar	Chandigarh	Kolkata	Patna	Bhubaneswar	Chennai	Hyderabad	Bangalore	Kochi	West	North	East	South
Very much involved	39	34	40	34	29	41	45	33	25	41	46	39	40	42	41	39	37	39	41	40
Somewhat involved	40	35	36	40	49	41	41	40	54	39	42	46	35	35	39	29	40	42	41	32

\*The values are in percentage (%).

45% of married men agree with this finding. Patna with 88% and followed by Bhubaneswar with 85% shares.

### Men in the family decide which Frozen Snacks snacking items to consume

Three fourth of the Indian men (75%) play a role in deciding which snacking item to consume. The 31-45 years age band voted the most with more than 77% share.

All India																				
Very much involved: 35					Somewhat involved: 40															
Age					Gender		Marital status													
	18-25	26-30	31-35	36-40	41-45	Male	Female	Single	Married											
Very much involved	29	39	39	38	43	36	35	27	42											
Somewhat involved	40	42	38	41	37	42	38	41	39											
Cities								Regions												
	Mumbai	Pune	Ahmedabad	Jaipur	Bhopal	Delhi NCR	Lucknow	Amritsar	Chandigarh	Kolkata	Patna	Bhubaneshwar	Chennai	Hyderabad	Bangalore	Kochi	West	North	East	South
Very much involved	34	26	28	33	32	37	34	31	29	36	33	34	41	41	41	30	32	35	35	40
Somewhat involved	40	39	42	37	42	42	48	37	39	41	45	48	33	40	35	44	40	42	43	36

\*The values are in percentage (%).

Men agreed with 77% share. 42% of married men agree with this. Lucknow topped with 83% share followed by Bhubaneswar with 82% share.





### Men are increasingly cooking Frozen Snacks compared to pre-covid era

Three out four men (71%) are increasingly getting involved in cooking Frozen Snack. The 41-45 years age group lead with 82% share. Male obviously echoed more with 74% share.

All India																
Yes: 71																
Age										Gender			Marital status			
	18-25		26-30	31-35	36-40	41-45		Male		Female	Single		Married			
Yes	66		75	75	71	82		74		68	64		76			
Cities																
	Mumbai	Pune	Ahmedabad	Jaipur	Bhopal	Delhi NCR	Lucknow	Amritsar	Chandigarh	Kolkata	Patna	Bhubaneshwar	Chennai	Hyderabad	Bangalore	Kochi
Yes	71	58	64	66	76	75	74	71	71	69	74	68	71	72	75	72

\*The values are in percentage (%).

64% of the married consumers agreed with this, Bangalore with 75% followed by a common score of 74% from Patna and Lucknow each were the top three cities.



### Four reasons why Men are cooking more

Total																				
Both partners are working, so household chores are divided: 64	Equal parenting, so household chores are divided: 52		Men discovered love for cooking during covid: 40		Convenient options like frozen/ ready to cook foods has made cooking easy: 33															
Age						Gender		Marital status												
	18-25	26-30	31-35	36-40	41-45	Male	Female	Single	Married											
Both partners are working, so household chores are divided	61	68	67	61	55	64	64	62	66											
Equal parenting, so household chores are divided	53	53	53	52	41	52	52	52	53											
Men discovered love for cooking during covid	38	37	42	47	37	43	36	38	41											
Convenient options like frozen/ ready to cook foods has made cooking easy	27	30	35	47	37	31	35	31	34											
All India																Regions				
	Mumbai	Pune	Ahmedabad	Jaipur	Bhopal	Delhi NCR	Lucknow	Amritsar	Chandigarh	Kolkata	Patna	Bhubaneshwar	Chennai	Hyderabad	Bangalore	Kochi	West	North	East	South
Both partners are working, so household chores are divided	66	57	63	59	69	66	65	69	70	59	66	52	63	60	71	61	64	67	59	64
Equal parenting, so household chores are divided	45	58	62	48	55	52	57	45	58	51	44	54	52	52	63	48	50	53	51	55
Men discovered love for cooking during covid	49	41	28	28	33	54	40	41	16	37	37	41	28	39	42	40	45	37	37	40
Convenient options like frozen/ ready to cook foods has made cooking easy	40	41	38	33	54	40	41	16	37	37	41	28	39	39	42	40	45	37	37	40

\*The values are in percentage (%).



- **Household chores get divided because both the partners are working :** 64% Indians agreed with this top-rated reason. This sentiment echoed the most amongst 26-35 years age group. Chandigarh with 70% followed by Mumbai, Delhi NCR and Patna with 66% each were the top two.
- **Equal parenting gets the household chores divided :** At the second spot with 52% share, equal parenting came out strongly among 18-40 years age bracket with an average of 53% share. Bangalore topped with 63% share followed by Ahmedabad with 62% share.
- **Men discovered love for cooking during covid :** 40% of men confessed that they discovered the love for cooking during covid. The married men contributed to 41% of the vote share. Bhopal topped with 54% share followed by Mumbai with 49% share.
- **Convenient options like Frozen snacks have made cooking easy :** Last but not the least, one third men (33%) feel that Frozen Snacks has made it easy for them to cook. 47% of the 36-40 years age group came out strongest. This received endorsement from 35% women. Bangalore topped with 43% share and Mumbai followed with 40% share.



## SUB CHAPTER 4

What factors increase Frozen Snacks consumption?

### Top 6 reasons for the increase in snacking:

All India									
The convenience offered by froze / ready to cook foods: 47		Frozen snacks offer restaurant like taste or tasty food at home: 44				Cooking light snacks is faster and easier than meals: 53			
OTT consumption has increased: 37		More occasions celebrated at home (festivals, house parties, etc): 41				Cheaper alternative to rising prices of other food items: 34			
Age						Gender		Marital status	
	18-25	26-30	31-35	36-40	41-45	Male	Female	Single	Married
The convenience offered by frozen/ ready to cook foods	42	47	49	57	49	42	52	43	50
OTT consumption hasincreased	35	38	39	38	32	38	35	36	38
Frozen snacks offer restaurant like taste or tasty food at home	41	47	44	48	44	42	46	37	49
More occasions celebrated at home (festivals, house parties, etc)	34	46	42	50	38	39	43	36	44
Cooking light snacks is faster and easier than meals	47	54	53	63	74	50	56	49	57
Cheaper alternative to rising prices of other food items	34	34	32	37	26	33	34	34	34



	Cities																Regions			
	Mumbai	Pune	Ahmedabad	Jaipur	Bhopal	Delhi NCR	Lucknow	Amritsar	Chandigarh	Kolkata	Patna	Bhubaneswar	Chennai	Hyderabad	Bangalore	Kochi	West	North	East	South
The convenience offered by frozen/ ready to cook foods	51	44	55	42	33	51	44	53	52	41	43	44	40	50	56	56	47	50	41	47
OTT consumption has increased	40	36	37	40	41	40	34	18	40	35	38	18	38	28	46	32	39	36	33	38
Frozen snacks offer restaurant like taste or tasty food at home	44	44	51	33	48	47	42	42	42	46	41	38	47	32	46	42	44	45	44	44
More occasions celebrated at home (festivals, house parties, etc)	43	41	33	29	27	44	47	36	40	43	27	46	39	37	55	41	37	43	41	43
Cooking light snacks is faster and easier than meals	50	48	52	56	47	55	48	67	54	59	46	52	48	37	66	67	51	55	56	52
Cheaper alternative to rising prices of other food items	37	24	35	29	39	35	35	23	33	33	33	25	32	31	37	35	34	33	34	34

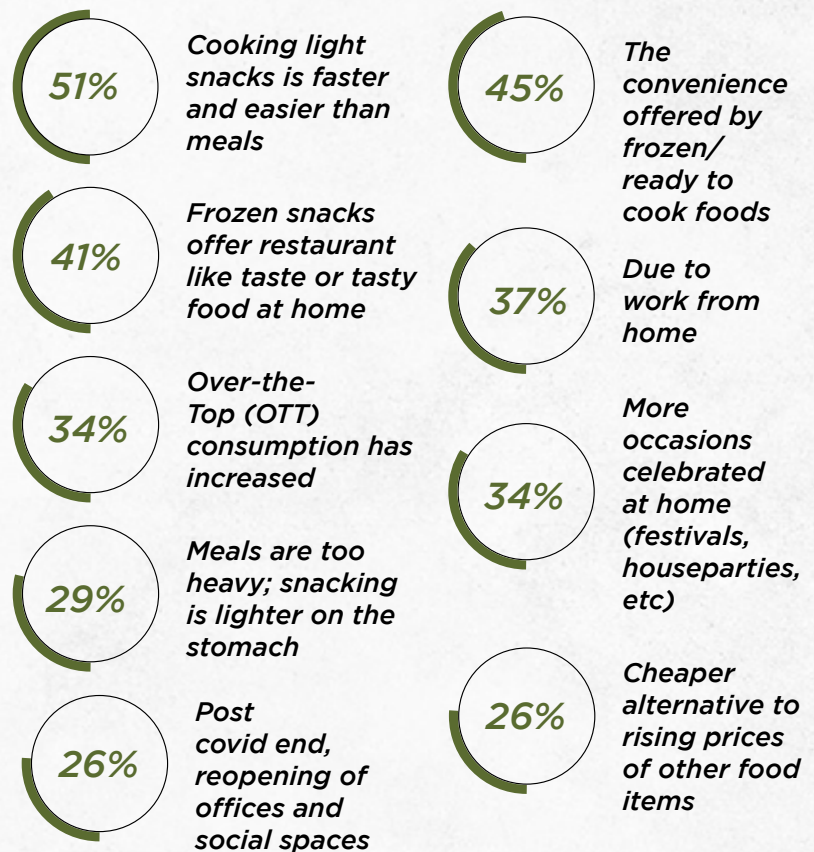
\*The values are in percentage (%).



While the previous section gave us an understanding of the Indian consumers, the below chart summarizes the views of the Health professionals.



**Health professionals speak:**



**DID YOU KNOW?**

Nowadays, there are no specific timing to consume Frozen Snacks. Anytime is snacking time!



All India		
Agree: 65	Disagree: 26	No opinion either way: 9

	Age					Gender		Marital status	
	18-25	26-30	31-35	36-40	41-45	Male	Female	Single	Married
Agree	60	70	68	66	60	64	66	62	67
Disagree	28	22	26	26	24	26	26	26	25
No opinion either way	12	8	7	8	16	10	9	12	8

	Cities															Regions				
	Mumbai	Pune	Ahmedabad	Jaipur	Bhopal	Delhi NCR	Lucknow	Amritsar	Chandigarh	Kolkata	Patna	Bhubaneswar	Chennai	Hyderabad	Bangalore	Kochi	West	North	East	South
Agree	66	57	69	70	62	67	70	66	64	62	64	56	65	62	67	61	65	67	61	65
Disagree	26	28	25	19	32	22	23	30	25	26	30	32	27	22	27	27	26	23	28	26
No opinion either way	8	15	6	11	7	11	7	3	11	11	6	12	7	16	6	12	9	9	11	9

\*The values are in percentage (%).

2 out of 3 Indians (65%) agree that there is no specific timing for the consumption of Frozen Snacks.

The age group that resonated the most with this sentiment was 26-30 years with a share of 70%. This was followed by 31-35 years (68%) and 36-40 years (66%).

The singletons and married consumers showed higher engagement with 62% and 67% vote share respectively.

Lucknow and Jaipur residents equally voted the highest with 70% preference share as compared to Ahmedabad with 69% share.









# MOOD UPLIFTER



Food and its style of consumption have an impact on one's mental state, emotions, and mood.

While we dealt with other parameters of snacking, this section specifically deals with frozen snacks and its correlation with mood.

## SUB CHAPTER 1

What is India's snacking mood during festive regional festivals?

### Types of preferred snacks during Indian festivals

Close to 3 out of 4 Indians (71%) agreed when asked if they consume Frozen Snacks during festive occasions.

All India																				
Yes: 71										Disagree: 29										
Age										Gender		Marital status								
	18-25	26-30	31-35	36-40	41-45	Male	Female	Single	Married											
Yes	63	75	76	76	85	71	71	64	77											
No	37	25	24	24	15	29	29	36	23											
Cities																Regions				
	Mumbai	Pune	Ahmedabad	Jaipur	Bhopal	Delhi NCR	Lucknow	Amritsar	Chandigarh	Kolkata	Patna	Bhubaneswar	Chennai	Hyderabad	Bangalore	Kochi	West	North	East	South
Yes	71	67	67	74	62	77	72	88	81	78	64	56	70	52	68	71	69	78	72	66
No	29	33	33	26	38	23	28	12	19	22	36	44	30	48	32	29	31	22	28	34

\*The values are in percentage (%).

85% of the 41-45 years age group resonated with this trend while the 18-25 years age group contributed only 63%.

Married consumers scored 77% vote share followed by singletons with 64% share

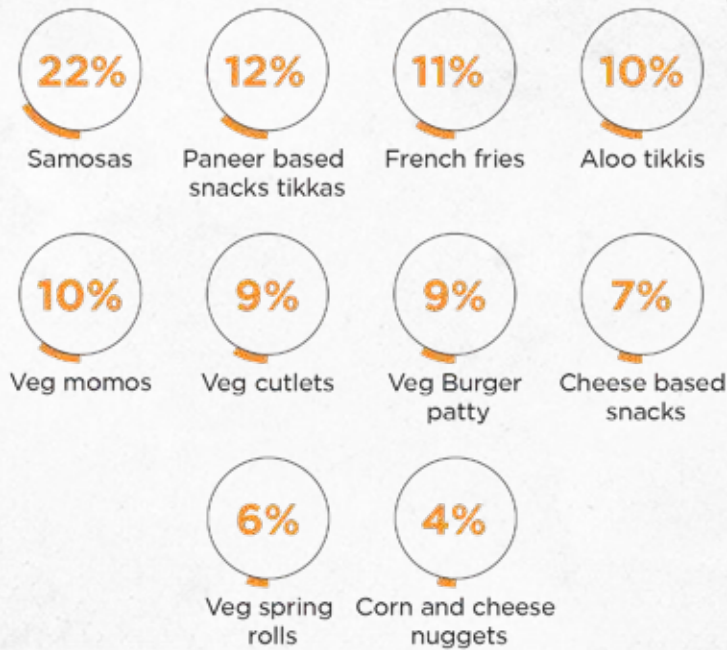
Amritsar residents gave a preference score of 88% followed by Kolkata with a score of 78%.



**PREFERRED SNACKING CATEGORIES  
DURING VARIOUS INDIAN FESTIVALS**



**GANESH CHATURTHI**



**DURGA PUJA**





## DIWALI



## CHRISTMAS





## EID

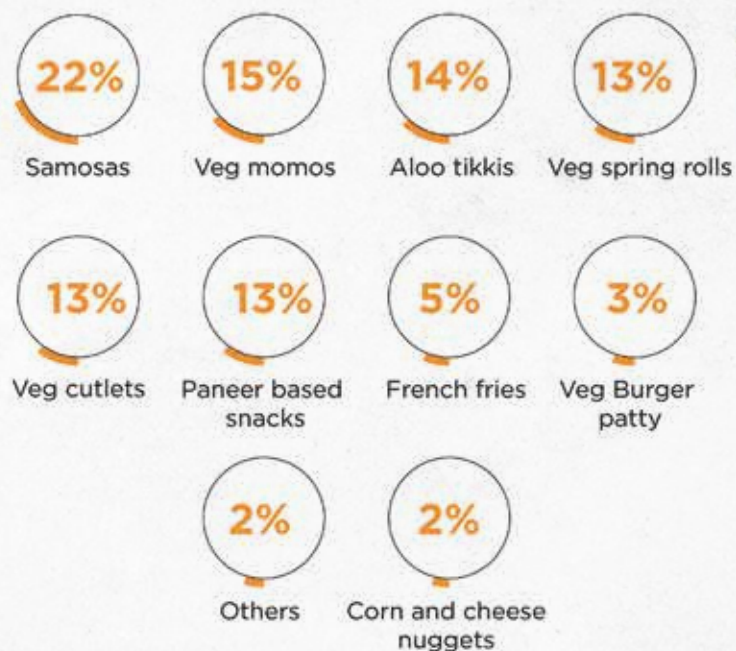


## BAISAKHI

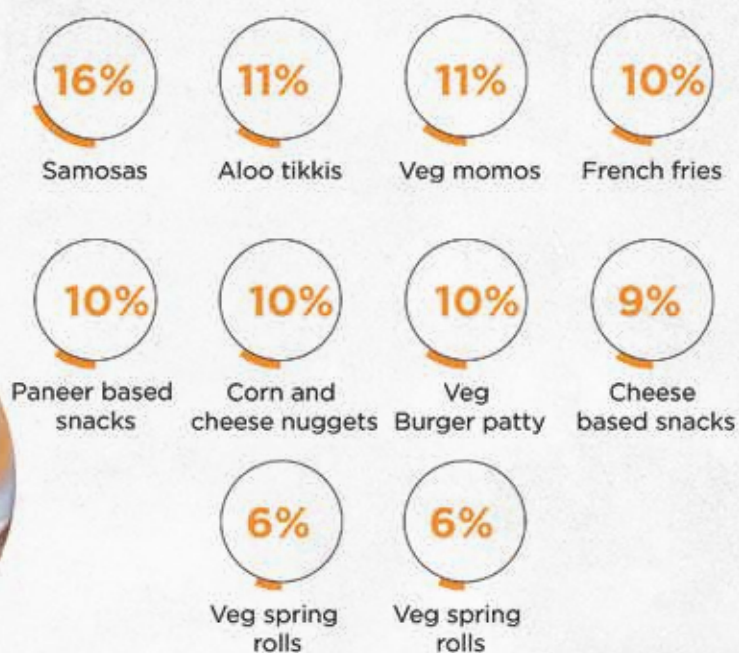




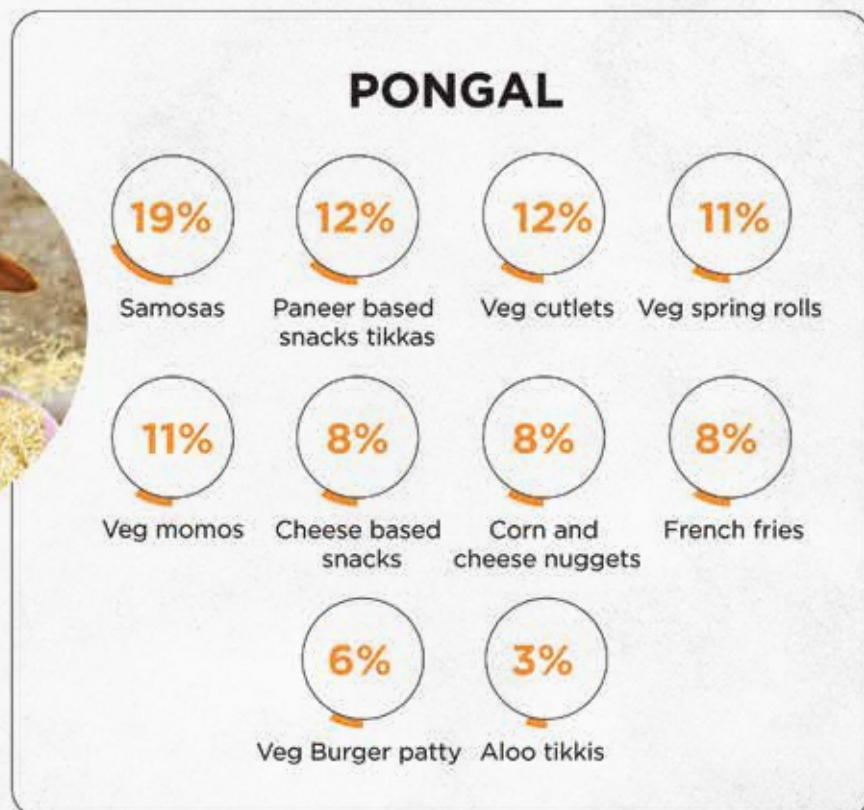
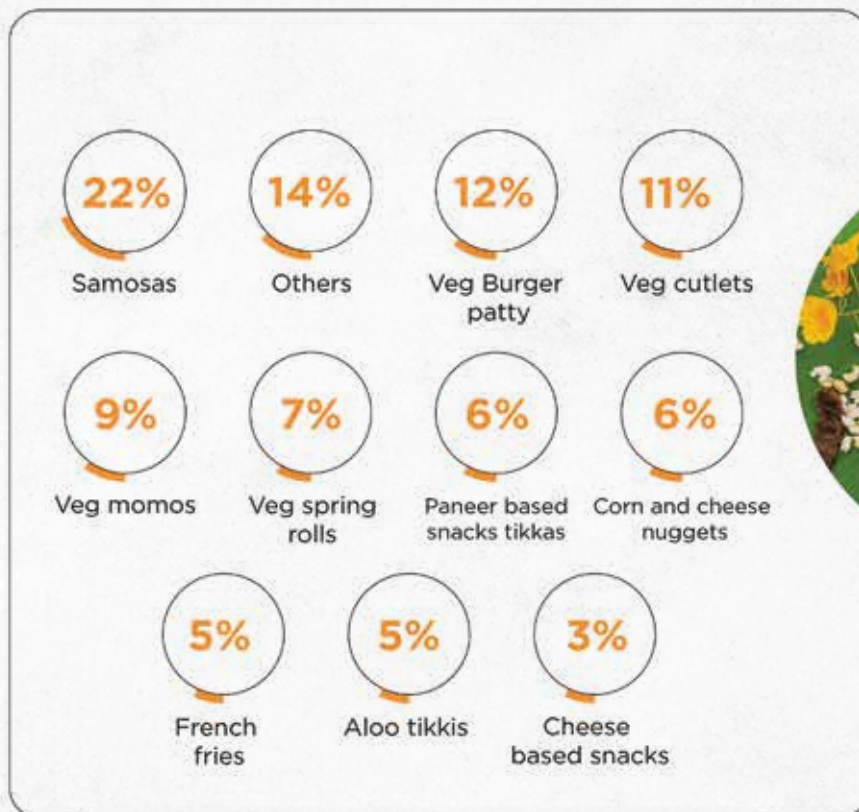
## CHHAT PUJA



## UGADI







## SUB CHAPTER 2

**Do Frozen Snacks help in uplifting consumer's emotional state or mood?**

### Snacking more when happy

3 out of 4 Indians (72%) agreed to the statement – “Frozen Snacks are also decided by mood – “I snack more when happy”

All India																				
Agree: 72					Disagree: 18					No opinion either way: 11										
Age										Gender		Marital status								
	18-25		26-30		31-35		36-40		41-45		Male	Female	Single	Married						
Agree	66		76		74		73		74		70	74	68	75						
Disagree	20		16		17		15		13		19	16	19	16						
No opinion either way	14		8		9		11		13		11	10	13	9						
Cities																Regions				
	Mumbai	Pune	Ahmedabad	Jaipur	Bhopal	Delhi NCR	Lucknow	Amritsar	Chandigarh	Kolkata	Patna	Bhubaneswar	Chennai	Hyderabad	Bangalore	Kochi	West	North	East	South
Agree	73	74	62	71	69	70	66	80	74	77	74	73	71	62	78	65	71	71	76	70
Disagree	15	14	21	23	23	17	23	18	12	12	17	20	21	21	14	23	18	18	14	19
No opinion either way	12	12	17	6	8	13	12	2	15	11	9	7	9	17	9	11	11	12	10	10

\*The values are in percentage (%).

Although the 18-25 years age group scored 66%, the 26-30 years age group showed more or less uniform higher degree of agreement with an average score of 75% share. Women seemed to agree more with 74% share as compared to 70% share from men.

Married respondents scored higher with 75% share. Amritsar scored the highest with 80% share followed by 77% from Kolkata.



### Snacking to uplift mood

While the above data demonstrated that snacking consumption is linked with happy mood, the below data shows that there are consumers who turn to snacking when they need a pick-me-up. 60% of Indians snack when they need to uplift their mood!

All India																				
Agree: 60					Disagree: 27							No opinion either way: 13								
Age										Gender				Marital status						
	18-25	26-30	31-35	36-40	41-45	Male	Female	Single	Married											
Agree	56	63	61	63	68	59	61	56	63											
Disagree	28	26	26	25	25	28	25	29	25											
No opinion either way	16	11	13	12	7	12	14	15	12											
Cities																	Regions			
	Mumbai	Pune	Ahmedabad	Jaipur	Bhopal	Delhi NCR	Lucknow	Amritsar	Chandigarh	Kolkata	Patna	Bhubaneshwar	Chennai	Hyderabad	Bangalore	Kochi	West	North	East	South
Agree	58	61	56	59	62	62	62	55	63	63	57	60	56	62	67	48	59	61	62	59
Disagree	25	25	29	25	27	23	30	40	24	24	31	30	32	23	22	35	26	26	26	28
No opinion either way	17	13	15	15	11	15	7	6	13	13	12	9	11	16	11	17	15	13	12	13

\*The values are in percentage (%).

The 41-45 years age group showed the maximum involvement with 68% of them taking up snacking in this category. Women showed a skew of 61% while men scored 59%.

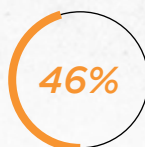
The singletons and married consumers voted 56% and 63% shares respectively.

Bangalore topped with 67% share followed by 63% share each from Kolkata and Chandigarh.



*Health experts speak on the mood quotient:*

**Mood**



*Tasty frozen snacks come to your rescue during mood swings*







#### **DID YOU KNOW?**

- The fact that Frozen Snacks help uplift the mood has led to this category getting in-roads into more and more occasions of celebration within Indian households.
- 41% of Indians agree that occasions for celebration have increased and this has led to the role of snacks becoming even more evolved.
- The 36-40 years age group showed the highest involvement with 50% vote share.
- 44% of the married consumers and 36% singletons affirmed this parameter.
- Bangalore topped the chart with 55% vote share while Bhopal and Patna scored 27% share.









# INDIA'S RISING CONFIDENCE ABOUT FROZEN SNACKS



The perception that Frozen Snacks are riddled with preservatives has been a long-standing understanding amongst the Indian consumers. Rightfully so, because no proactive and concerted attempt has been made towards addressing this.

However, the section below shows bullish indications about the Indian consumer's rising confidence on Frozen Snacks with regards to ingredients, preservatives and attempts to bust some of the existing myths.

## Frozen Snacks

Nearly two third of Indians (65%) believe that the consumption of veg or non-veg Frozen Snacks will increase in the near future.

All India																						
Disagree: 7					Neither Agree nor Disagree: 24					Agree: 65					Don't know: 4							
Age															Gender				Marital status			
	18-25		26-30		31-35		36-40		41-45		Male		Female		Single		Married					
Disagree	9		7		5		7		7		9		5		9		6					
Neither Agree nor Disagree	27		23		25		16		20		25		23		26		22					
Agree	60		66		67		72		68		62		67		62		68					
Don't know	4		4		3		5		5		3		5		4		4					
	Cities															Regions						
	Mumbai	Pune	Ahmedabad	Jaipur	Bhopal	Delhi NCR	Lucknow	Amritsar	Chandigarh	Kolkata	Patna	Bhubaneshwar	Chennai	Hyderabad	Bangalore	Kochi	West	North	East	South		
Disagree	7	9	9	9	10	9	3	2	8	7	16	10	6	9	5	8	8	7	9	6		
Neither Agree nor Disagree	23	29	19	23	25	24	25	18	17	24	22	22	27	26	20	29	24	23	23	25		
Agree	67	56	61	68	66	63	70	75	72	66	60	66	62	62	69	58	64	67	65	64		
Don't know	3	7	11	4	-	4	2	5	3	4	3	1	5	3	6	5	4	4	3	5		

\*The values are in percentage (%).

The 36-40 years age group showed highest amount of excitement with 72% share. Women seemed more bullish with 67% share. Married and single consumers voted 68% and 62% respectively.

Amritsar topped with 75% share followed by Chandigarh with 72% share.



With the above bullish sentiment, let us deep dive into the reasons that make India excited about the future growth of Indian Frozen Snacks category:

### ***It is a misconception that Frozen Snacks have preservatives***

More than half India (54%) agreed that Frozen Snacks do not contain preservatives. A quarter (26%) are borderline case who neither agree nor disagree.

All India			
Completely believe: 23	Somewhat believe: 31	Neither believe nor disbelieve: 26	Somewhat disbelieve: 12

	Age					Gender		Marital status	
	18-25	26-30	31-35	36-40	41-45	Male	Female	Single	Married
Completely believe	21	25	25	22	33	23	24	20	25
Somewhat believe	30	31	34	30	25	31	30	29	32
Neither believe nor disbelieve	28	25	25	28	28	27	26	28	25
Somewhat disbelieve	14	12	10	11	13	12	13	14	11

	Cities																Regions			
	Mumbai	Pune	Ahmedabad	Jaipur	Bhopal	Delhi NCR	Lucknow	Amritsar	Chandigarh	Kolkata	Patna	Bhubaneswar	Chennai	Hyderabad	Bangalore	Kochi	West	North	East	South
Completely believe	22	20	24	25	19	20	35	11	27	23	29	24	22	25	29	17	22	22	24	24
Somewhat believe	28	34	31	33	29	30	33	35	22	32	30	28	35	31	31	27	30	30	31	32
Neither believe nor disbelieve	30	30	26	15	33	27	20	31	26	26	23	24	26	29	21	31	27	27	25	26
Somewhat disbelieve	12	11	14	21	15	12	7	15	16	13	14	8	11	9	11	18	14	12	12	11

\*The values are in percentage (%).

The 31-35 years and 41-45 years groups showed higher agreement with a vote share of 59%. Both men and women agreed with 54% share each.

Lucknow topped with 68% share followed by Bangalore at 60%



#### Health professionals speak:

**50% professionals felt it is a misconception that frozen snacks have preservatives. In fact, 56% also stated that people believe that these snacks are preservative-free.**

#### Perceptions about Frozen snacks



56% of the health professionals believe that consumers are not aware that Frozen Snacks are preservatives-free. This creates a huge opportunity for brands to create and sustain consumer awareness programs.





### Frozen snacks are safe for consumption.

57% of India completely and somewhat agreed that Frozen Snack foods are safe for consumption. The 31-40 years age group showed higher affinity towards this belief with 59% share. Male respondents seemed more convinced with 59% share as compared to 56% from women.

#### All India

Completely believe: 24 | Somewhat believe: 33 | Neither believe nor disbelieve: 27 | Somewhat disbelieve: 11

	Age					Gender		Marital status	
	18-25	26-30	31-35	36-40	41-45	Male	Female	Single	Married
Completely believe	21	25	28	25	22	24	24	19	28
Somewhat believe	34	33	31	34	32	35	32	34	32
Neither believe nor disbelieve	28	26	26	27	32	27	27	30	25
Somewhat disbelieve	13	11	10	10	10	10	13	13	10

	Cities																Regions			
	Mumbai	Pune	Ahmedabad	Jaipur	Bhopal	Delhi NCR	Lucknow	Amritsar	Chandigarh	Kolkata	Patna	Bhubaneswar	Chennai	Hyderabad	Bangalore	Kochi	West	North	East	South
Completely believe	28	18	23	22	28	23	29	13	20	28	25	27	22	11	32	21	25	23	28	22
Somewhat believe	32	28	34	35	31	37	35	36	28	37	28	24	35	24	27	25	32	36	33	30
Neither believe nor disbelieve	24	31	30	22	23	25	21	47	40	23	30	28	26	33	27	31	26	29	25	28
Somewhat disbelieve	11	20	10	16	12	10	10	3	8	8	13	14	11	16	11	18	13	9	10	12

\*The values are in percentage (%).

Married consumers came out strongest with 60% share. Kolkata 65% and Lucknow with 64% share were the top two cities confirming this belief.

### Frozen Snacks are tastier than fresh food

57% of Indians prefer Frozen Snacks because they believe it is tastier than fresh food. The 41-45 years age group scored 64% followed by 31-35 years age group with 61%.

All India			
Completely believe: 27	Somewhat believe: 30	Neither believe nor disbelieve: 23	Somewhat disbelieve: 12

	Age					Gender		Marital status	
	18-25	26-30	31-35	36-40	41-45	Male	Female	Single	Married
Completely believe	23	29	30	26	36	25	28	21	31
Somewhat believe	30	28	31	30	28	30	29	30	30
Neither believe nor disbelieve	23	23	23	23	14	22	23	24	22
Somewhat disbelieve	14	12	10	12	13	13	11	15	10

Cities																	Regions			
	Mumbai	Pune	Ahmedabad	Jaipur	Bhopal	Delhi NCR	Lucknow	Amritsar	Chandigarh	Kolkata	Patna	Bhubaneswar	Chennai	Hyderabad	Bangalore	Kochi	West	North	East	South
Completely believe	26	22	21	28	32	27	41	19	25	25	27	20	28	23	28	29	26	28	25	27
Somewhat believe	23	26	34	33	29	32	27	44	25	30	31	38	35	25	29	23	27	32	31	30
Neither believe nor disbelieve	24	26	21	18	26	21	16	27	18	22	27	20	22	28	24	26	23	21	22	22
Somewhat disbelieve	18	15	14	10	5	11	11	8	19	14	11	12	8	16	11	11	14	12	13	11

Men and women converged with 56% share. Married consumers voted the most with 61% share. Lucknow topped with 69% share followed by Chennai with 63% share.



### No difference in the quality of frozen vs. fresh food

44% of Indian consumers believe that the quality of frozen snacks matches with that of fresh food. The 31-35 years age group scored highest with 47% share.

All India																				
Completely believe: 18					Somewhat believe: 26					Neither believe nor disbelieve: 21					Somewhat disbelieve: 17					
Age										Gender		Marital status								
	18-25	26-30	31-35	36-40	41-45	Male	Female	Single	Married											
Completely believe	16	21	19	17	10	19	17	15	20											
Somewhat believe	27	24	28	23	26	26	26	23	28											
Neither believe nor disbelieve	19	23	19	21	31	21	21	21	20											
Somewhat disbelieve	19	16	16	18	11	17	16	20	15											
Cities																	Regions			
	Mumbai	Pune	Ahmedabad	Jaipur	Bhopal	Delhi NCR	Lucknow	Amritsar	Chandigarh	Kolkata	Patna	Bhubaneswar	Chennai	Hyderabad	Bangalore	Kochi	West	North	East	South
Completely believe	16	16	20	26	15	16	27	11	13	19	20	13	20	19	13	18	18	17	18	18
Somewhat believe	27	18	20	16	27	26	27	26	24	29	33	15	26	32	32	17	23	26	27	28
Neither believe nor disbelieve	20	25	30	18	27	17	17	18	13	19	24	26	21	21	24	20	23	17	21	22
Somewhat disbelieve	17	20	14	16	20	18	17	22	26	16	15	20	13	11	15	23	17	19	17	14

\*The values are in percentage (%).

Men voted 45% share whereas women 42% share. 48% of married and 38% of unmarried respondents agreed with this. Lucknow topped with 54% share followed by Patna with 53% share.



### **Health experts speak about Frozen Snacks vs fresh food:**

When it comes to the comparison between fresh & frozen food, technology is seen to play an important role. Health professionals have urged for the need to create more awareness about the role of technology in making frozen snacking category safe.

### **Perceptions around frozen vs. fresh food**







### **Health experts speak about Frozen Snacks vs fresh food:**

Close to 50% felt frozen foods are better at keeping the nutritional content intact for longer as compared to fresh foods.

### **Perceptions around frozen vs. fresh food**

**49%**

***Frozen foods are able to lock in the nutritional content for a longer time, while fresh foods go stale faster***

**45%**

***Frozen foods cleverly use the right technology to help retain the freshness of the foods***

**39%**

***Frozen veggies which are flash frozen immediately post-harvest are more nutritious than fresh veggies which undergo long storage transport***

**28%**

***Frozen veggies are usually picked and frozen at the peak of their ripeness, while fresh veggies are picked before it is fully ripe and shipped long distances, which can cause nutrient loss***

### Lack of time to cook

57% Indians agree that consumption of Frozen Snacks is also driven by the fact that people are getting less time to cook. This feeling was the strongest within the 32-45 years age bracket with 62% share.

All India																							
Disagree: 10				Neither Agree nor Disagree: 29						Agree: 57				Don't know: 3									
Age												Gender				Marital status							
		18-25		26-30		31-35		36-40		41-45		Male		Female		Single		Married					
Disagree		11		11		9		8		10		12		8		11		9					
Neither Agree nor Disagree		31		30		27		30		21		30		29		32		27					
Agree		54		58		62		58		64		56		59		53		61					
Don't know		5		2		2		4		4		3		4		4		3					
Cities																Regions							
		Mumbai	Pune	Ahmedabad	Jaipur	Bhopal	Delhi NCR	Lucknow	Amritsar	Chandigarh	Kolkata	Patna	Bhubaneshwar	Chennai	Hyderabad	Bangalore	Kochi	West	North	East	South		
Disagree		8	7	15	11	3	7	8	8	12	11	15	13	13	10	9	12	9	8	12	12		
Neither Agree nor Disagree		25	28	24	27	41	29	28	42	29	29	27	27	32	36	24	31	27	31	29	30		
Agree		63	56	58	55	53	60	60	50	57	56	51	60	54	51	64	53	59	58	56	56t		
Don't know		4	9	3	6	3	4	4	-	2	3	7	-	1	3	3	3	5	3	3	2		

\*The values are in percentage (%).

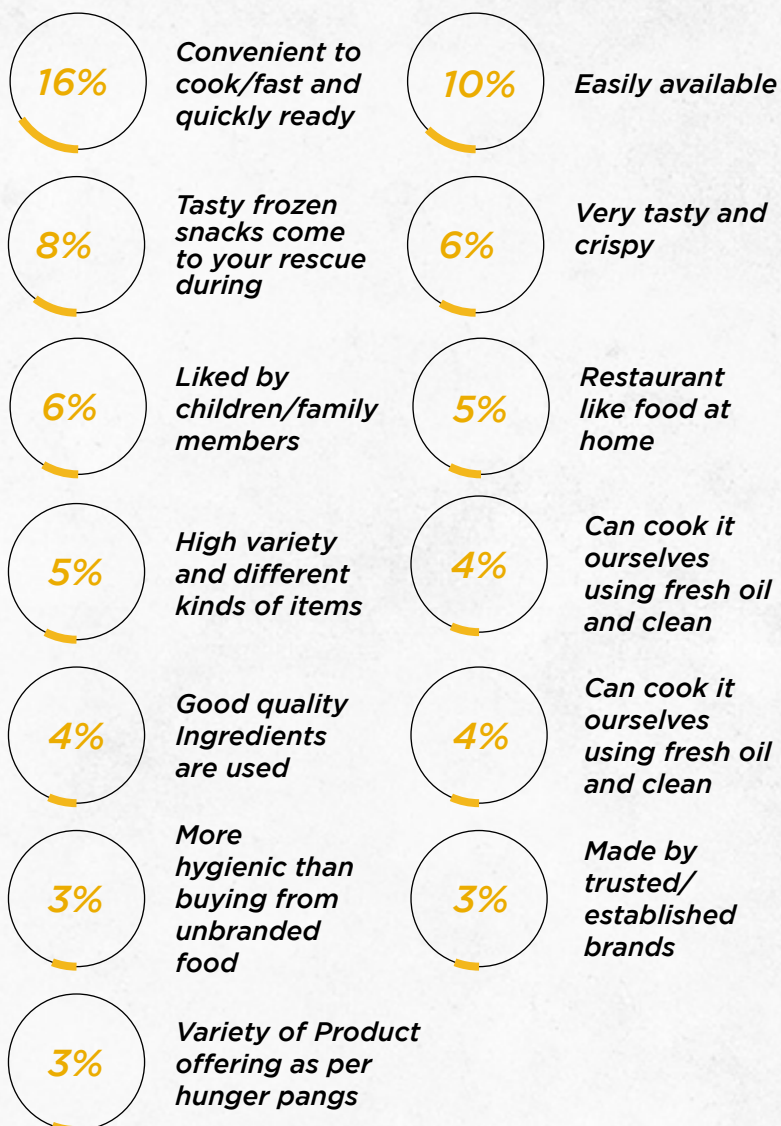
Women and men contributed 59% and 56% respectively. Married consumers voted the most with 61% share. Bangalore topped with 64% share followed by 63% share from Mumbai.





*Health experts speak on the factors that will catalyze the growth of this segment:*

**Most important drivers**











# OCCASIONS WHEN WE THINK FROZEN SNACKS!



India finds comfort in Frozen Snacks. The word comfort is a net of various factors such as safety & quality assurance, taste, ease or convenience of access and a mood uplifter.

The below section gives us an estimation of the various occasions when Indians find comfort in Frozen Snacks!

## All India

<b>Parties &amp; celebrations:</b> 44	<b>When there is no one to cook:</b> 37	<b>While watching web series/ movies, etc. on TV/ OTT/ Mobile:</b> 51	<b>During live TV viewing (at home) of sporting events like Cricket - World Cup/ IPL, Football - World Cup/ Indian Football League, Tennis events, Formula one:</b> 49
<b>Guest homecoming:</b> 38	<b>When children feel hungry:</b> 22	<b>On romantic dates or occasions like Valentine's Day:</b> 20	
<b>Weekend:</b> 46	<b>When studying/exams:</b> 21	<b>Post physical intimate moments/ sex:</b> 14	
<b>As an accompaniment with alcoholic beverages:</b> 23	<b>In lunch box tiffin:</b> 22	<b>During vacations/ holidays:</b> 37	



	Age					Gender		Marital status	
	18-25	26-30	31-35	36-40	41-45	Male	Female	Single	Married
<b>Parties &amp; celebrations</b>	38	46	47	49	43	39	48	40	47
<b>Guest homecoming</b>	28	39	43	52	45	36	40	32	42
<b>Weekend</b>	41	48	50	50	52	47	46	45	47
<b>As an accompaniment with alcoholic beverages</b>	17	23	26	32	26	24	22	18	26
<b>When there is no one to cook</b>	35	40	35	36	36	35	38	39	35
<b>When children feel hungry</b>	4	20	33	47	48	15	29	1	37
<b>When studying/ exams</b>	27	19	17	19	15	21	22	26	18
<b>In lunch box/ tiffin</b>	19	21	22	29	19	20	23	18	24
<b>While watching web series/ movies, etc. on TV/ OTT/ Mobile</b>	49	51	52	55	51	50	53	50	52
<b>On romantic dates or occasions like Valentine's Day</b>	18	20	21	27	10	19	22	16	23
<b>Post physical intimate moments/ sex</b>	12	15	15	17	6	16	12	11	16
<b>During vacations/ holidays</b>	34	37	39	40	36	35	38	34	39
<b>During live TV viewing (at home) of sporting events like Cricket - World Cup/ IPL, Football - World Cup/ Indian Football League, Tennis events, Formula one</b>	45	52	50	50	49	50	47	45	52

Cities																					Regions				
	Mumbai	Pune	Ahmedabad	Jaipur	Bhopal	Delhi NCR	Lucknow	Amritsar	Chandigarh	Kolkata	Patna	Bhubaneswar	Chennai	Hyderabad	Bangalore	Kochi	West	North	East	South					
Parties & celebrations	46	47	40	42	47	43	31	51	53	45	43	37	37	45	52	51	45	43	43	44					
Guest homecoming	41	31	38	29	33	39	25	48	41	39	43	36	32	34	46	52	36	38	39	38					
Weekend	48	42	38	40	61	44	50	52	38	48	32	42	50	45	51	43	46	45	45	49					
As an accompaniment with alcoholic beverages	27	20	20	26	15	27	15	13	25	27	17	18	19	11	35	9	24	23	24	20					
When there is no one to cook	41	40	38	39	34	40	36	29	43	37	40	35	30	32	37	26	39	38	37	32					
When children feel hungry	25	14	22	10	14	21	15	23	13	21	13	6	13	26	20	38	29	20	17	28					
When studying/exams	20	18	33	27	22	23	25	22	20	23	27	18	15	17	29	8	23	23	23	18					
In lunch box/tiffin	22	28	31	16	17	23	19	23	10	27	16	15	21	14	26	15	23	21	23	20					
While watching web series/movies, etc. on TV/ OTT/ Mobile	53	58	52	52	43	50	51	40	41	55	41	50	53	54	52	46	52	48	52	52					
On romantic dates or occasions like Valentine's Day	20	21	23	14	13	24	27	19	11	23	20	20	17	16	27	15	19	22	22	19					
Post physical intimate moments/ sex	12	13	15	18	12	20	13	7	17	13	17	10	10	7	21	5	14	17	13	12					
During vacations/holidays	39	47	31	33	30	38	34	23	28	38	36	35	37	38	47	34	37	34	37	39					
During live TV viewing (at home) of sporting events like Cricket - World Cup/ IPL, Football - World Cup/ Indian Football League, Tennis events, Formula one	52	51	43	45	33	49	48	35	50	56	44	52	47	50	53	37	47	47	53	48					

\*The values are in percentage (%).



### ***While watching web series/ movies, etc. on TV/ OTT/ Mobile***

Interestingly, the rise in the consumption of OTT content has sprung as one of the key reasons for the increase in snacking frequency. 37% of India voted for this parameter. An average of 36% vote share was observed across age groups.

Gender-wise, men scored 38% while women 35%. There was not too much of variance across singletons and married consumers. An average of 35% was maintained.

Bangalore topped with 46%. Mumbai, Jaipur, Bhopal, Delhi and Chandigarh followed second with 41% of their residents voting for OTT consumption as the reason for increase in snacking.

The rise or explosion of the Media & Entertainment Industry is imminent. As per the FICCI-EY 2024 report on India's Media and Entertainment sector, the Media & Entertainment sector is growing at 10% annually and is estimated to cross INR 3 trillion by 2026. The industry produces a staggering 200,000 hours of content annually including over 1,700 films, 3,000 hours of premium OTT content, and 20,000 songs. The consumption of media and entertainment content through platforms such as TV, OTT, Mobile etc. turned to be the most popular snacking occasion for India. 51% of Indians snack while consuming TV, OTT or Mobile Phone content.

The age group of 36-40 years were relatively more inclined (55%) towards this occasion of snacking. Women voted 53% while men 51%.

Pune led amongst cities with 58% residents voting for this. Chandigarh came a close second with 55% of its residents confirming to snacking while watching content on TV, OTT and Mobile.

### ***During live TV viewing (at home) of sporting events***

Scoring 49%, watching live TV sports telecasts like Cricket, Football, Tennis events, Formula one etc. turned out to be another favourite snacking occasion. Age group wise, 26-30 years showed relatively higher preference of 52%.

2023 saw a variety of major sporting events from cricket, football, tennis, boxing, F1 and so on. The Indian Premier League, ICC Cricket World Cup, F1, Australian Open, and many other sporting events led to increased opportunities for snacking. The last few years of TV Viewership data of sports programs show that Sports programme consumption is no longer relegated to select demographics of males alone but now has pretty much become a family affair.

Men seemed more inclined with 50% voting for this occasion as compared to 47% women. Married women and singletons showed preferences of 52% and 45% respectively.

Kolkata, one of India's sports-crazy cities, showed the highest preference with 56% of its respondents preferring to snack while watching live sports telecasts on television. This was followed by Bangalore with 53% and Mumbai 52% preference share.

### ***Weekend snacking***

46% of India finds comfort in snacking simply because it is a weekend. While only 41% agreed from the 18-25 years age group, the higher age groups showed increased agreement averaging 50%.

Both gender and marital status wise, preferences for this occasion were in sync.

Bhopal topped amongst cities with 61% of its residents agreeing to?

### ***During parties & celebrations***

44% of Indians prefer parties and celebrations as a reason to consume snacks. While 38% of the 18-25 years age group resonated with this occasion, the higher age groups leading to 45 years contributed 46% vote share.

Half of Indian women (48%) gave resounding affirmation while men scored 39%.

While the singletons scored 41%, married couples showed higher resonance with a 47% preference share.

Chandigarh topped with 53% share followed by Bangalore with 52% share. Kochi and Amritsar jointly stood third with 51% share.

### ***When guests come home***

38% Indians welcome guests at home with Frozen Snacks. This other occasion witnessed maximum traction from 36-40 years age group with 52% vote share followed by 45% from the 41-45 years age group.

40% of the women and 36% men confirmed this as a snacking occasion. Married respondents showed higher involvement with 42% share as compared to those who are single

Kochi scored the highest with 52% share followed by Amritsar with 48% share.





### ***During vacations/ holidays***

44% of Indians prefer parties and celebrations as a reason to consume snacks. While 38% of the 18-25 years age group resonated with this occasion, the higher age groups leading to 45 years contributed 46% vote share.

Half of Indian women (48%) gave resounding affirmation while men scored 39%.

While the singletons scored 41%, married couples showed higher resonance with a 47% preference share.

Chandigarh topped with 53% share followed by Bangalore with 52% share. Kochi and Amritsar jointly stood third with 51% share.

### ***As an accompaniment with alcoholic beverages***

About one in four Indians (23%) are high spirited about consuming snacks as an accompaniment to alcoholic beverages. The 36-40 years age group showed a higher preference with a 32% share.

26% of the married respondents seemed more inclined to complementing alcohol with snacks as compared to those who are single (18%) .

Bangalore topped with 35% of its residents preferring this combination. Kochi trailed last with just 9% preference share.

### ***When children feel hungry***

22% of Indians depend on snacks when it comes to feeding hungry kids. While 36-45 years age group contributed 48% of the vote share, 26-30 years scored 20%, and 31-35 years brought in 33% preference share.

Women showed a natural inclination towards this quick-fix solution that would take care of hungry kids. 29% of them preferred this as compared to just 15% of men.

Bangalore scored the highest with 38% of residents preferring this. Kochi scored a second with 29%.

### ***In lunch box/ tiffin***

Another occasion that also scored 22% was Frozen Snacks being stuffed in lunch/tiffin boxes. The 36-40 years age group showed the highest preference with close to 30% share.

Women scored 23% share as compared to men with 20% share. As compared to those who are single (18%), married consumers contributed to a 24% vote share.

Ahmedabad residents showed the highest affinity for this quick fix solution with 31% share followed by Pune with 28%.

### ***When studying/exams***

21% finding studying or exam preparations a perfect moment to consume snacks. Which is why, the younger age band of 18-25 years showed higher preference with 27% share as compared to 18% average of the rest.

Single consumers scored more with 26% vote share followed by 18% preference from those who are married.

Ahmedabad topped with 33% preference followed by 29% share from Bangalore.

### ***During romantic dates or occasions (like Valentine's day)***

1 out of 5 Indians (20%) consume Frozen Snacks during romantic moments or on dates. While one would expect that the younger age groups would resonate more with this, to our surprise, the 36-40 years age group gave the maximum preference share of 27%. The younger lot scored an average of 20%.

Gender wise, 22% of women showed snacking interest during this occasion as compared to men with 19% share.

23% of the married respondents agreed with this combination whereas the singleton category scored 16% resonance.

Bangalore and Lucknow jointly topped the city list with 27% of its respondents agreeing to snacking during romantic dates. Delhi NCR came a close second with 24%.







# CONSUMER SUGGESTIONS FOR INDIAN FROZEN SNACKS MANUFACTURERS

## 10 Consumer suggestions for Indian frozen snack manufacturers

Indian consumer trends show that the future of the Frozen Snacks industry is bullish. They have come up with 10 interesting suggestions for the FrozenSnacks manufacturers:

### Feedback 1

Lack of healthier ingredients like ragi.

62% Indians would like to see healthier ingredients like ragi and other millets being added to the frozen snacking variety.

### Feedback 2

Brands should educate how frozen snacks are preservative-free.

50% of Indians are keen that Frozen Snacks manufacturing brands educate consumers that frozen snacks are preservative free.

### Feedback 3

Would like to know the type and quality of ingredients being used in Frozen Snack.

48% of India is keen to be informed about the type and quality of ingredients being used by the manufacturers.

### Feedback 4

Should not be expensive and high priced.

46% votes came for the aspect of Frozen Snacks being highly priced. Indians expect the pricing of Frozen Snacks to be reviewed.

### Feedback 5

Should consume less cooking oil.

45% Indians would like the Frozen Snacks cooking to consume less oil.

### Feedback 6

Should be edible long time after cooking Consumers feel that frozen snacks do not taste as good after cooling down.

39% Indians do have an issue of consuming it soon after preparation as it is hot

### Feedback 7

Indians want 'sachetized' Frozen Snacks packaging.

31% Indians feel that Frozen Snacks should also be available in smaller packs/sachets.

### Feedback 8

Should match the taste of those prepared in sweet/snacks shops.

29% feel that the taste if Frozen Snacks items should match the taste of those prepared in sweet/snacks shops outside.

### Feedback 9

The Frozen Snacks should thaw quickly.

28% feel that Frozen Snacks should not take too much time to thaw or soften for one to start cooking.

### Feedback 10

Education on how to cook frozen snacks Though a small number,

15% of Indians do not consume Frozen Snacks because they do not know the way to prepare or cook it.





Health Professionals give their take on the challenges  
Frozen Snacks manufacturers













(Volume 2)

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