

INDIA'S HEALTHY CONSUMPTION

Food Habits That Will Sustain

In The Coming Decade

2.0

THE STAPLE FOOD DIET



Every Indian child, irrespective of the state, city, religion, or family they were born into has either ducked or devoured this glass of milk while growing up.

In India, milk is considered to be an essential source of nutrition (Read: calcium) for children in their formative years.

Milk, however, is not an isolated case. Until the late '80s, Indians have derived almost all of their required nutrition from the food they consumed. Foods like wheat, rice, vegetables, fruits, pulses, milk and milk products, and grains formed an integral part of every meal.

EVOLVING FOOD & MOOD

Starting 1990 though something changed. The landscape for consumables in India was starting to pivot. Indians now had access to global brands they had probably only heard of before. The decade saw some big brand launches in India

Pepsi (1990), Coke (Returned to India in 1993), Baskin-Robbins (1993), Kellogg's (1994), Lays (1995), KFC (1995), Mc Donald's (1996)

Now,



**Poha was
replaced with
Cornflakes**



**Buttermilk
was replaced
with Colas**



**Chaklis were
replaced with
Chips**

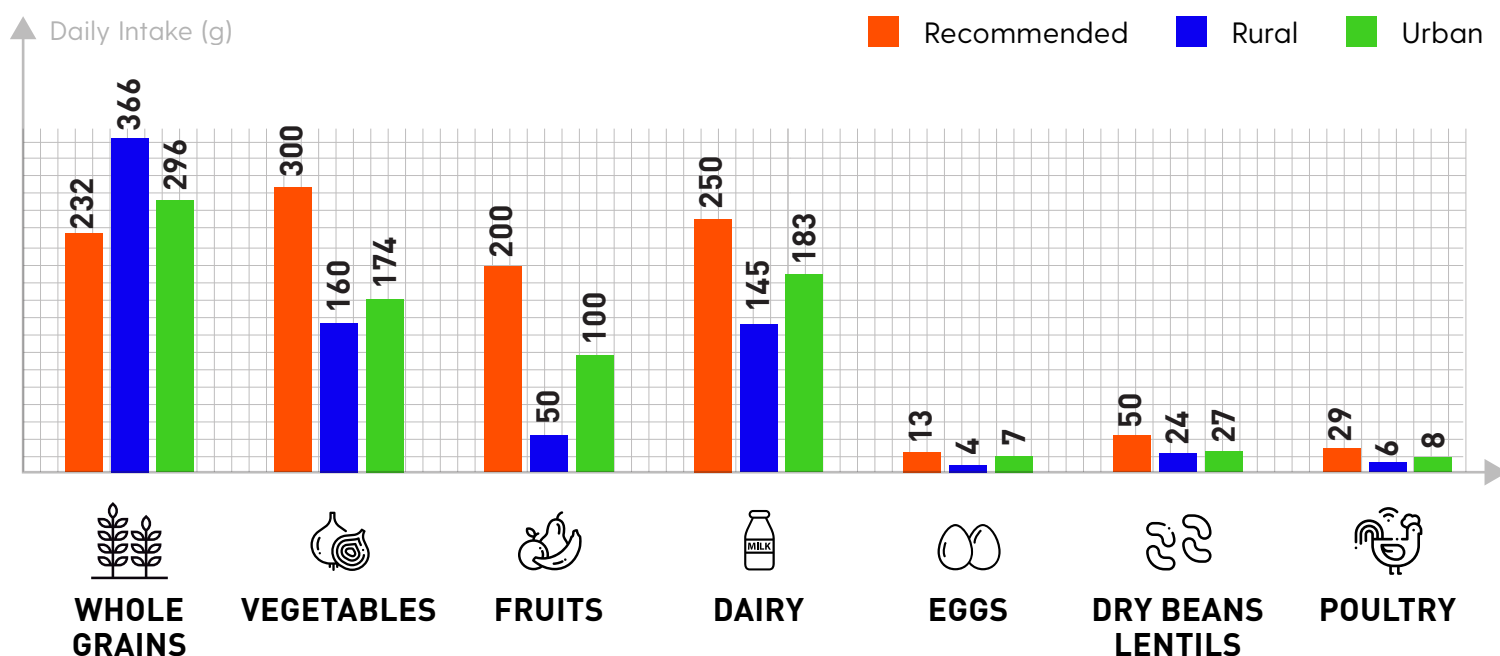


**Samosas were
replaced with
Burgers**

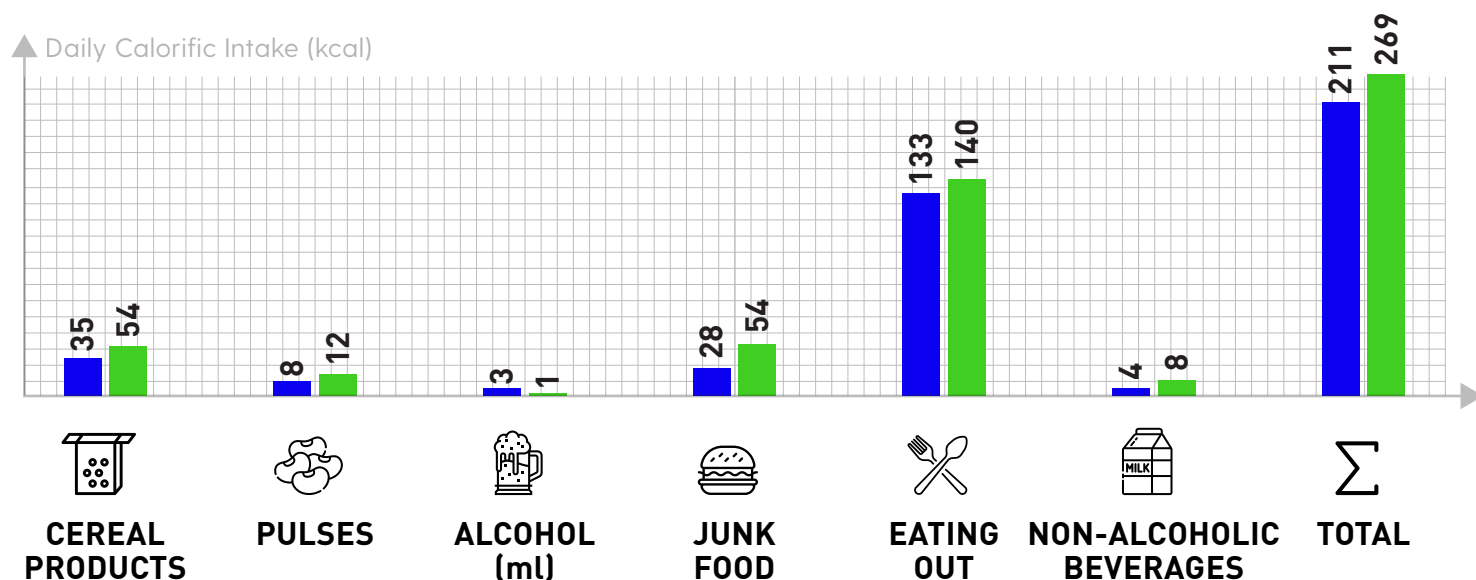
These brands became the starting point in India's changing consumption story.

INDIA: HEALTHY OR NOT SO MUCH?

The change in India's consumption pattern has resulted in some glaring abnormalities in the nutritional intake as well. In research conducted by Lancet it was found that in India, we are falling short on most counts except sugar. This is true for both urban as well as rural populations.



To top it off, bad sources of nutrition are also given generous space on the plate:



India's health report is a stark reflection of this skewed nutritional intake.

The logo for India Today, featuring the words "INDIA" and "TODAY" in a red, serif font, with "INDIA" positioned above "TODAY".

“

*The prevalence of **obesity in Indian children and teenagers** has increased significantly during 1990-2017, with an **annual rise of 4.98%**, according to the study.*

“

The logo for Firstpost, featuring the word "FIRSTPOST." in a bold, black, serif font.

***Diabetes** became the country's fastest-growing disease burden over 16 years to 2016, with **72 million cases in 2017**.*

“

The logo for The Hindu, featuring a crest with a lion, a horse, and an elephant, with the words "THE HINDU" in a blue, serif font below it.

*The prevalence of **heart disease and stroke** has **increased by over 50%** from 1990 to 2016 in India.*

These findings made us wonder & compelled us to dive deeper into the subject. This report presents the compiled results from research conducted and our first-hand experience of working across the industry.

Through this report, you can expect to unravel the growing consumer preference towards healthy consumption and uncover opportunities stemming from this trend.

FOOD? PACK IT UP!

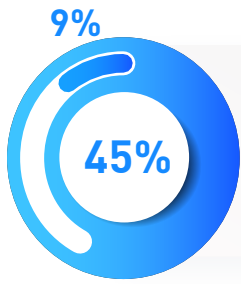
We've established three things so far.

- The influx of ready to eat consumable brands in India has seen an upward trend since the 1990's
- During the same time, the overall health reports amongst Indians have plunged downwards.
- Lastly, the declining health can be attributed to the imbalance in nutritional intake

This picture starts becoming clearer once we account for consumer behavior that leads us up to this point.



As per a study published in the Cambridge University Press on Indian consumers,



Roughly 45% of the surveyed participants bought packaged food once a week. A fifth of them buy it every day.

Researchers have attributed the growth of the packaged goods market to the following factors:



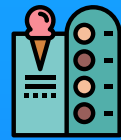
CONVENIENCE

79% of the urban population prefers to have ready-to-eat meals and food. They do not have the time to make full-fledged proper meals thrice a day.



RISE IN INCOME

As people flock to metropolitan cities for jobs, their standard of living rises up. With more money to spend, eating out and consumption of packaged goods becomes the norm.



AVAILABILITY OF OPTIONS

65% of India's population resides in rural areas and are attracted to the diverse and yummy food options that urban people consume. Thus, at the shops, they make a beeline for them.

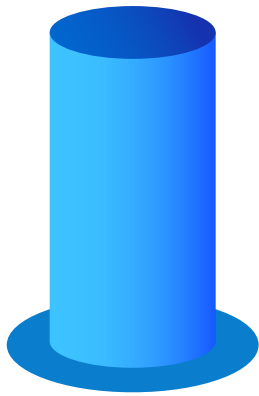
The result? From 2014-19 alone, the **RTE market in India grew at a CAGR of 21.99%**, as per the India Ready-to-Eat Food Market Forecast and Opportunities 2019. [APT Eateries]

INDIANS: SNACKING THE RIGHT WAY

With the packaged food market on the rise, the snacking market graph is also showing an upward trend!

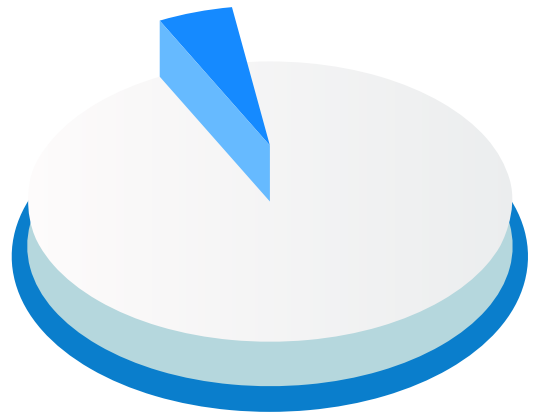
According to Statista,
revenue in the **Snack Food**
segment amounts to

US\$5,839m in 2020.



The market is expected to
grow annually by

6.3% (CAGR 2020-2023).



The primary reason - Busy Lifestyle!

Planning a full meal 3 times a day seems like a task. This is where snacking comes in!

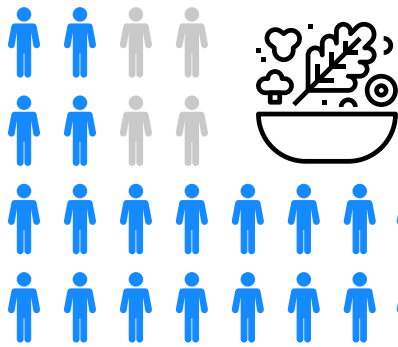
As per a survey we carried out recently

49% of consumers eat 4+ snacks per week, 30% of which consume snacks every day.

Both, the supply and demand side relay a consistent story -

Indians are avid snackers!

While we figured out that people snack a lot, we also discovered they don't snack just to snack! What they choose to snack on is nowadays a well-informed & smart choice.



90M

individuals who are affluent & living in urban areas, are both aware and concerned about lifestyle related health issues.^[Redseer]

Indian consumers want to make healthy choices!

Dominant brands in the market are proof of this shift from simply snacking to healthy snacking. Snacks that are usually marked as “unhealthy” are now coming up with variants that are 10/10 when it comes to healthy snacking options.



With all these healthy snacking categories rising up the charts, which packaging trends are going to help brands stand out and make their presence felt the most? Which overarching trends out of these have worked so far?

Let's have a look.

52% OF PEOPLE AGREE THAT
PACKAGING PLAYS A CRITICAL
ROLE IN DETERMINING WHETHER
A SNACK IS PERCEIVED AS
HEALTHY OR NOT.

[BORD BIA INSIGHT CENTER]

Before the consumer ever tastes the snack, they see it. Thus, the packaging of the snack can greatly influence customer buying decisions. Further explained are some trends ruling the packaging and design industry.



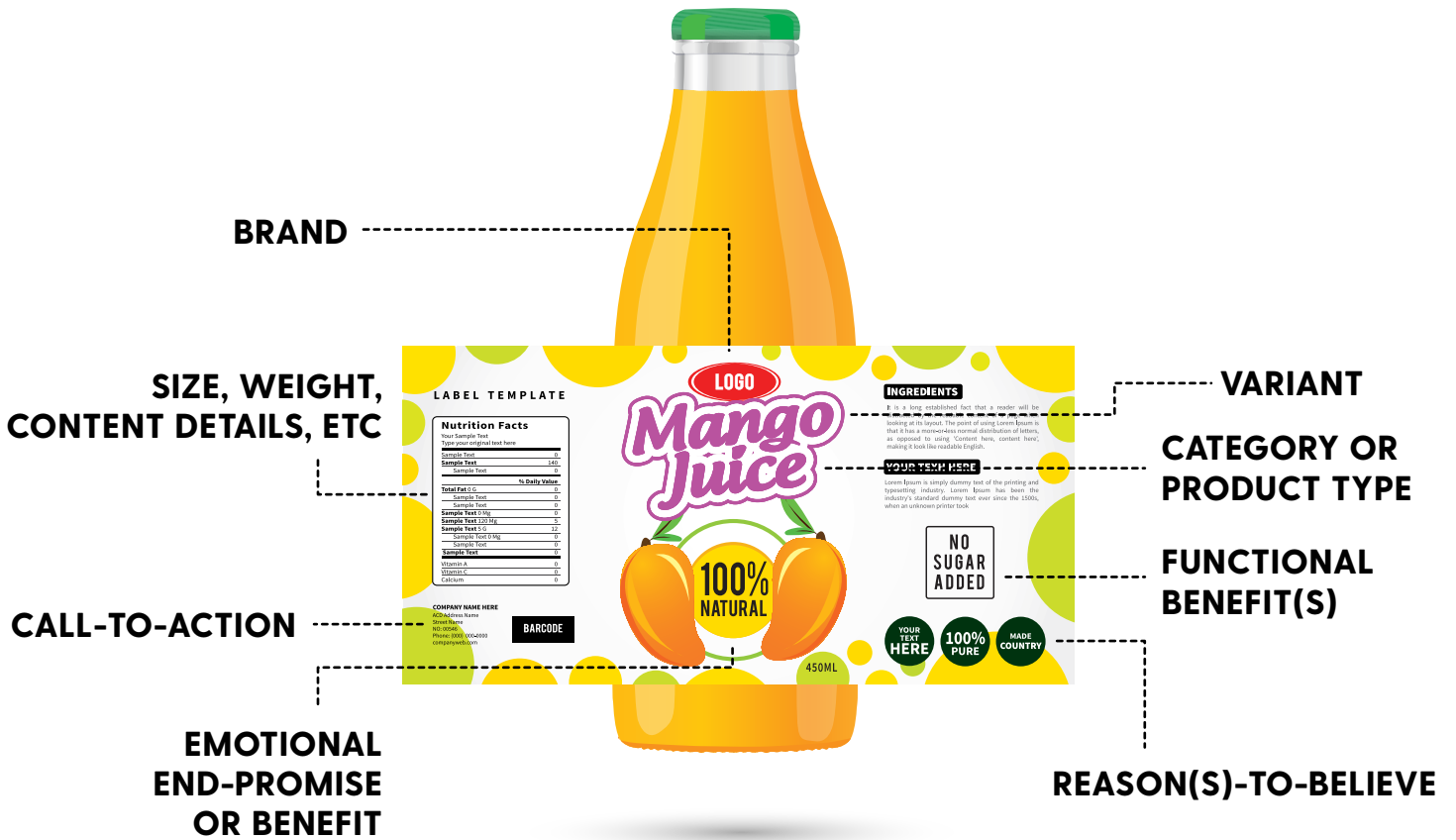
PACKAGING THAT WILL SHINE

Through our experiences of the packaging space, we've understood one thing well - Even with all the fluctuating trends, one thing stays eternal: **the appeal of clarity in design.**

The healthy snacks industry has especially tapped into this truth to make packaging relatable to their consumers. When we analyzed what the best-designed brands had in common, this is what we found: all great designs convey two essential things:

- What is the product?
- Why should customers buy it?

Following is our list of **must-haves to create a successful packaging design:**



Even though snacking is a fairly new market, packaging design in this segment has seen a drastic transformation.



This clearly indicates- **packaging that conveys the necessary information is what's desired by the consumers now, especially when it comes to packaged food products.** Take the example of this Epigamia Yogurt.

Epigamia: Minimalism at its best

There is minimal cluttering on the packaging, especially when you look at the front of it. 'Less is enough' is the new adage. The customer feels an instant pull to at least pick the cup off of the shelf.



Only the most necessary information- about the flavor, the USP, and the healthy symbol- are printed on the front. The rest of the necessary information falls on the back.

PACKAGING FORMATS TO LOOK AT



**MONO CARTONS
FOR CEREALS**



**PET BOTTLES
FOR JUICES**



**LAMINATED
POUCHES FOR
CHIPS**



**TIN CANS FOR
SOFT DRINKS**

These conventional packaging formats seem like an unalterable choice.

Nonetheless,

Will the consumers prefer the usual, safe standard packaging formats or will they want innovative packaging formats? Should I try to explore more options?

This question runs into the mind of every new age packaging professional. In the case of healthy snacks, while the packaging format is not the primary concern, brands are seen experimenting in this area. Having an unusual format surely works when it comes to grabbing the customers' attention. We all know that we just have 3 seconds to do that & unique packaging formats are the hack!

One successful example is



Paperboat: The Figurine that Stands Out

Apart from its fantastic storytelling and brand identity on the internet, there is something else that attracts one to Paperboat: it's unusual shape.



It was a bold tactic to move away from the usual cardboard-based tetra paks & instead use laminated stand-up pouches. This packaging is more visually appealing and leads to a more comfortable beverage flow/ drinking experience. This unusual packaging shape as well as format not only catches the consumer's eye but also builds a brand image of innovation and freshness- two traits we associate with Paperboat.

SUSTAINABILITY: A NECESSITY



43% of consumers have said that an eco-friendly package makes them consider a brand whereas 91% of them are on the lookout for environmental logos for shopping. [Tetra Pak]

Consumers are aware of and sensitive to the environmental hazards the earth faces. They're now choosing products that will not contribute to this damage. And brands will need to align themselves with to this change.

In such a scenario, the packaging industry needs to play its part to offer the customers a **“guilt-free packaging experience”**. There are two ways to do this-



The first thing that comes to mind when we say **eco-friendly packaging** is “plastic-free”. Packaging manufacturers can avoid plastic tapes & stickers, start exploring different materials, keep paper as the base of their packaging & so on to build a green future.



Another way can be **“reduction of wastage”**. Brands can start offering subscription packs or sharable packs instead of single-serve packs.

The only way forward for brands is to find ways to incorporate sustainable packaging in their supply chain. This will definitely give them an edge in the market.



A BALANCED COMBINATION OF
**CREATIVE ARTWORK & DESIGN, APT
PACKAGING FORMAT, AND A
SUSTAINABLE APPROACH HAS
ENORMOUS POTENTIAL** IN
CONTRIBUTING TOWARDS YOUR
ENDEAVOR OF PERFECT PACKAGING
FOR YOUR PRODUCT.

THE WHO'S WHO OF HEALTHY SNACKING

In India, there are players who have already recognized the growing demand for healthy packaged snacks. They've put two and two together to come up with entirely new products that are easy-to-eat but healthy at the same time. As of now, the key players include:

TOO YUMM



Brand USP:

These are low calorie-packed chips with 5 flavor variations.



Packaging USP:

Product Is The Hero | Agile Style For A Dynamic Audience | Black In Food Packaging

Even the veggie sticks are served with 'chilli chataka'

EPIGAMIA



Brand USP:

Delicious flavored greek yogurt prepared for the Indian audience.



Packaging USP:

To The Point | No-nonsense + Clean And White To Suggest No Additives | Natural Cue

The perfect healthy snack between meals

GREEN SNACK CO



*Your passport to snacking
guilt-free because look, it's kale!*



Brand USP:

Providing delicious and nutritious snacks that are prepared using natural and fresh ingredients. No sugar, preservatives, or additives either.



Packaging USP:

Directness | Scalable Format | Transparency

YOGA BAR



*No reason for Mom to say no
to chocolate because these
aren't that!*



Brand USP:

Marrying convenience with health yet again, these protein bars are great as on-the-go snacks.



Packaging USP:

Attractive Bright Colors With Playful Font And Illustrations

MAX PROTEIN



*A lot of energy promised
in this one!*



Brand USP:

As per the website, this is 'not just any snack. It's a power snack!' They have a variety of products, all meant to fill the protein gap in the diet.



Packaging USP:

Clean Design + Adaptive Architecture + Bold



Flavure'



What Did Bizongo Do?

Structure Design - Brand, Packaging & Communication Design.

Packaging Interpretation

Format - Scalable

Design - Dynamic & bold design to pop out & grab customer attention.





EAT BETTER
LIVE BETTER

What Did Bizongo Do?

Structure Design - Concept, Brand Identity, And Packaging Design

Packaging Interpretation

Format - Moving away from the usual PET jars or bag-in-box to stand out in the category.

Design - Perfect combination of food and art, thereby displaying the roots of Nagaland. Modern design to suit the modern audience.



OPEN SECRET™



What Did Bizongo Do?

Structure Design - Secondary Packaging, Tertiary Packaging & Gift Packaging

Packaging Interpretation

Format - A unique format to easily stand out & make a stellar impression on the customer.

Design - Usage of stickers to customize tiffin boxes bringing in the feeling of nostalgia!



WHAT DOES THE FUTURE HAVE IN STORE

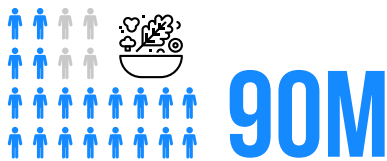
Revenue in the **Indian Snack Food** segment currently amounts to **US\$5,839 million**.

Even if we are to conservatively assume that the healthy snacks account for 2% of this revenue it still stands at...

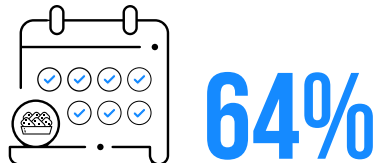
...~US\$116 million,

which is 3X the GDP of the smallest nation of the world.

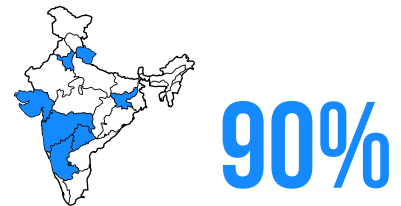
The flourishing supply side is an outcome of the growing number of health conscious Indians and their need to consume healthy food. And the data below is a reconfirmation of this story.



Indians were reported to be health conscious in 2018. This number is projected to rise to 130 mn by 2022.[Redseer]



of the consumers, if given a chance, would prefer monthly subscription of healthy snacks.
[Bizongo Survey]



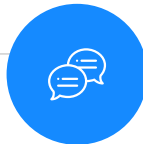
of the current demand comes from the top 7 metros. The category is expected to penetrate in tier 2 and 3 cities in the next 5 years. [Redseer]

Few things to consider while you address this demand and capture market share would be



Build a Strong Brand Story

Create an identity to strike a chord with health conscious consumers. Packaging & marketing collateral would be crucial for this step.



Communicate Information Effectively

Consumers today, want to be informed about what they consume. Ensure clear communication of important product information.



Achieve a Balance Between Price and Product Value

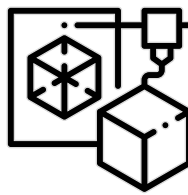
70% of consumers we surveyed think that healthy food is expensive. For these consumers, arrive at a price point that hits a sweet spot while retaining product value.

GET IN TOUCH....

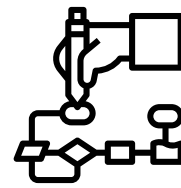
TAKE YOUR IDEA TO MARKET WITH OUR CUSTOMIZED DESIGN SOLUTIONS



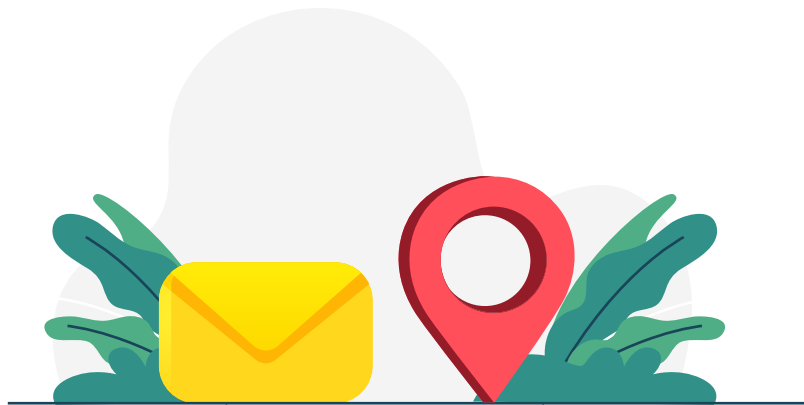
BRAND &
IDENTITY DESIGN



PACKAGING
DESIGN



STRUCTURE
DESIGN



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We'll be the happiest to have a conversation with you over a cup
of green tea and a few healthy bites!
