



HEALTHY SNACKING REPORT

2024

*A Wholesome Consumer Insights Study
Presented By Farmley*

Contents

- Foreword
- Demographics
- Key Highlights
- A Battle Of Generations: Peri Peri v/s Black Pepper
- Chocolate Rules! But Mango Steals The Show
- A Gen Z Twist To An Age Old Indian Tradition
- India's Snacking Habits Double On Saturdays & Sundays
- Beyond Cravings, India's Snacking Culture Is Surprisingly Complex
- Gen Z Embraces Makhana
- Health Takes A Bite Into Snacking
- Beyond Convenience: Rising Consumer Awareness
- Research Methodology
- Limitations
- Conclusion

Foreword

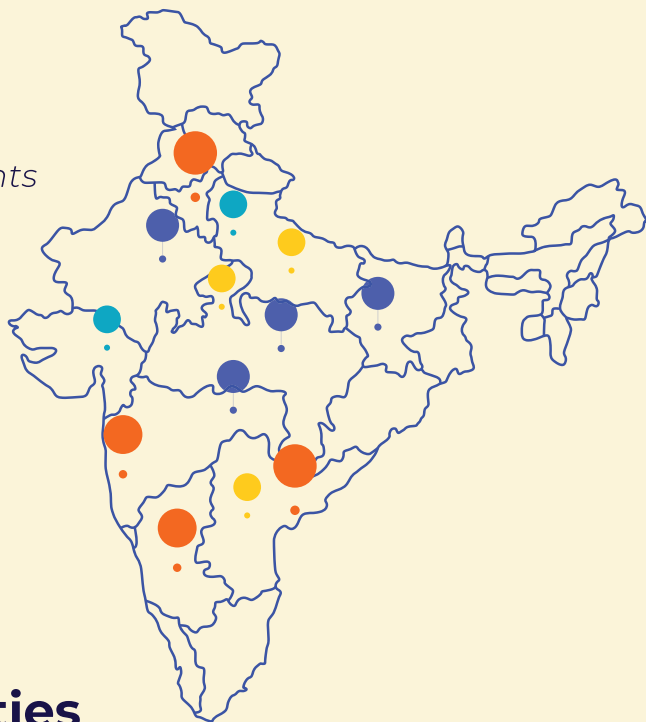
In today's India, snacking isn't just about grabbing a quick bite – it's about indulging in a delicious experience. Taste remains paramount for consumers, who crave treats that tantalize their taste buds. However, this desire for flavour doesn't come at the expense of well-being. A growing health consciousness is sweeping the nation, and Indians are demanding healthy snacking options that don't sacrifice the joy of a satisfying treat. This presents a golden opportunity for brands to innovate, creating delicious and nutritious snacks that cater to this discerning and health-focused consumer.

At Farmley, we recognize this paradigm shift as an exciting opportunity. We are committed to being a leader in this revolution and we try and make a difference through in-depth research and active engagement with our audience. We aim to stay ahead of the curve by constantly understanding the evolving consumer preferences. We believe that healthy snacking shouldn't come at the expense of taste. We focus on developing delicious and satisfying snacks that are also packed with wholesome ingredients. Building trust with our consumers is paramount for which we prioritize transparency in our ingredient sourcing and labeling practices, empowering individuals to make informed choices.

The future of snacking in India is undeniably bright. Consumers are seeking a win-win situation – convenience that doesn't compromise on health. This presents a vast landscape of possibilities for innovative brands like Farmley. We envision a world where indulging in delicious treats is a mindful experience, contributing to a healthy and active lifestyle. By becoming a partner in your healthy snacking journey, Farmley aims to make every delicious bite a step towards a better tomorrow for a healthier India.

Demographics

6000+ Respondents

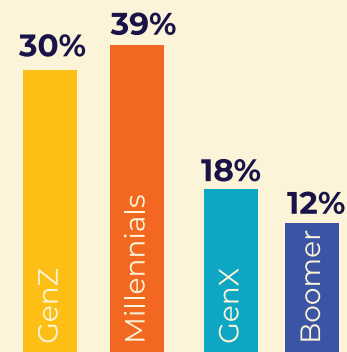
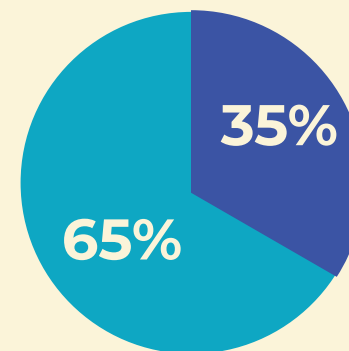


Cities

Tier 1	65%
Tier 2	17%
Tier 3	2%
Tier 4	12%

Gender

Males	65%
Females	35%



Generations

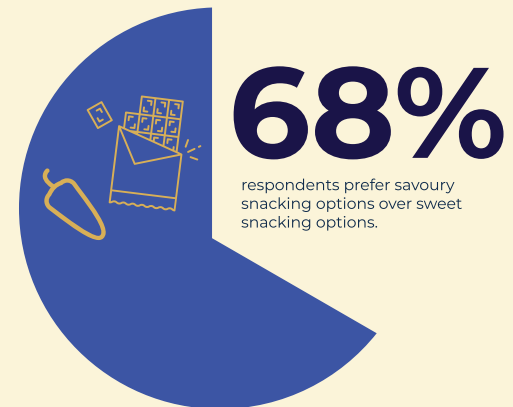
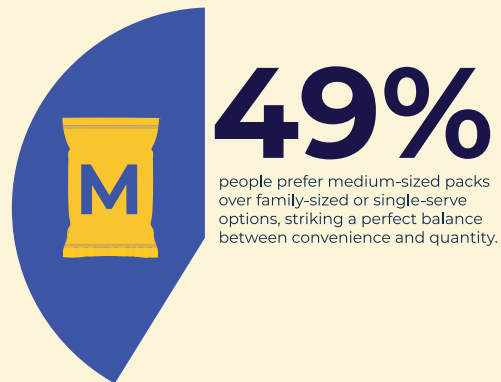
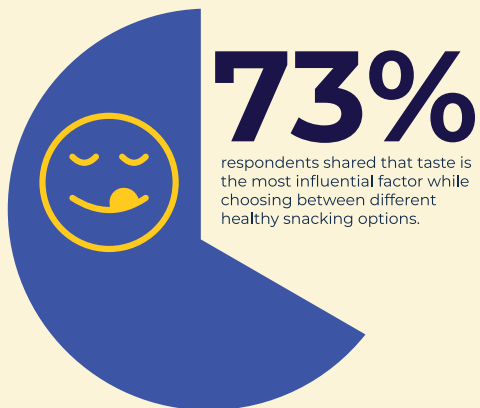
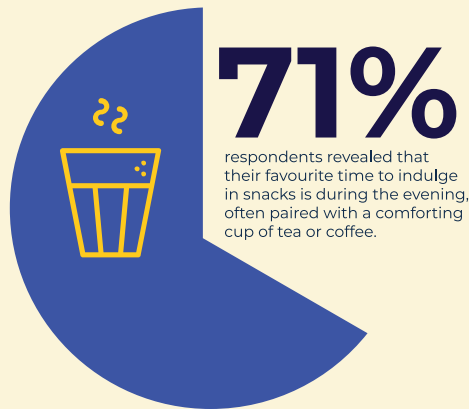
Boomer	12%
GenX	18%
Millennials	39%
GenZ	30%

Occupation

Homemaker	9.03%
Non Working	6.68%
Salaried	47.33%
Self Employed	21.80%
Student	15.16%



Key Highlights



A Battle Of Generations: Peri Peri V/S Black Pepper

(Achaari Asks "Why Not Me?")

A Battle for India's Savoury Taste Buds

The research offered a fascinating glimpse into the world of Indian snacking preferences, revealing a battle for taste bud supremacy between the globally-inspired and the tried-and-true.

While both salty and spicy flavors reign supreme across all ages, a closer look unveils a generational divide in the quest for the ultimate snack thrill.





Fiery Peri Peri

On one hand, we have the fiery reign of peri peri, a piquant newcomer brought to India by QSRs (Quick Service Restaurants).

This flavour has captured the hearts (and taste buds) of 44% of Millennials & Gen Z. Perhaps it's the novelty, the global association, or the sheer intensity of the flavour that makes peri peri such a hit with the younger crowd.

They crave an adventure for their palates, a flavour that awakens their senses and keeps them coming back for more.



**Millennial
& GenZ Crave
Adventure**





Legacy Driven Black Pepper

On the other hand, we have the enduring legacy of black pepper, a familiar friend to 38% of Gen X and 39% of those over 60.

This classic spice might not be the flashiest of all the flavours on the shelf, but it holds a certain nostalgic charm. It's the reliable sidekick, the dependable source of warmth, the flavour that brings back memories of childhood snacks. Black pepper isn't flashy, but it gets the job done, satisfying those who appreciate tradition and comfort.





Intriguing Case Of Achaari

Now, let's talk about the intriguing case of Achaari, a flavour specifically designed to tantalize the Indian palate. One might expect it to be a clear winner, yet the data reveals a surprising lack of enthusiasm across all age groups. Only 13% of people over 60, 18% of Gen X, 29% of Millennials, and 31% of Gen Z favour Achaari.

This could be due to several reasons. Perhaps the flavour profile is too specific, failing to cater to the broader desire for either the fiery kick of peri peri or the comforting warmth of black pepper.

It's also possible that Achaari is seen as a more "acquired" taste, something that hasn't quite captured the popular imagination yet.





Summary

Millennials & Gen Z showed a craving for bold flavours, with 44% favouring the fiery peri peri - the latest trend in quick service restaurants. Meanwhile, older generations preferred to stick with the timeless classic, black pepper.

The Achaari flavour, tailored for Indian taste buds, surprisingly falls short of expectations across all age groups. Are manufacturers missing the mark with this cultural twist?

Transcending age barriers, salty and spicy flavours reign supreme in India, winning hearts across the board.



Chocolate Rules! But Mango Steals The Show

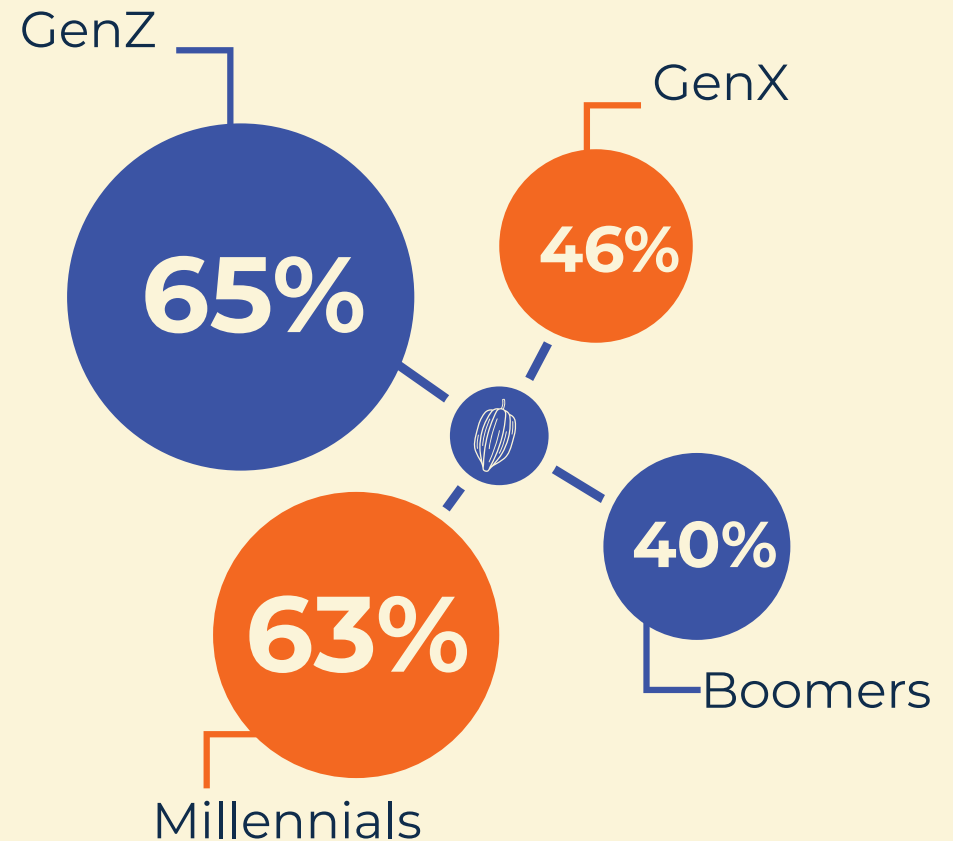
India's Sweet Tooth Craves Comfort (& A Tropical Twist)

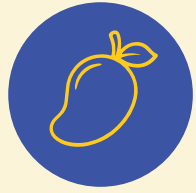


Soft Spot For The Classics

Forget salty and spicy for a second, because when it comes to sweet treats, India has a clear soft spot for the classics. Chocolate, that timeless champion of confections, reigns supreme across all generations. A whopping 65% of Gen Z, 63% of Millennials, a 46% of Gen X, and even 40% of Boomers can't resist its rich, decadent allure.

It seems chocolate's ability to transport us back to childhood memories of birthday cakes and happy moments is a universal language, no matter your age.

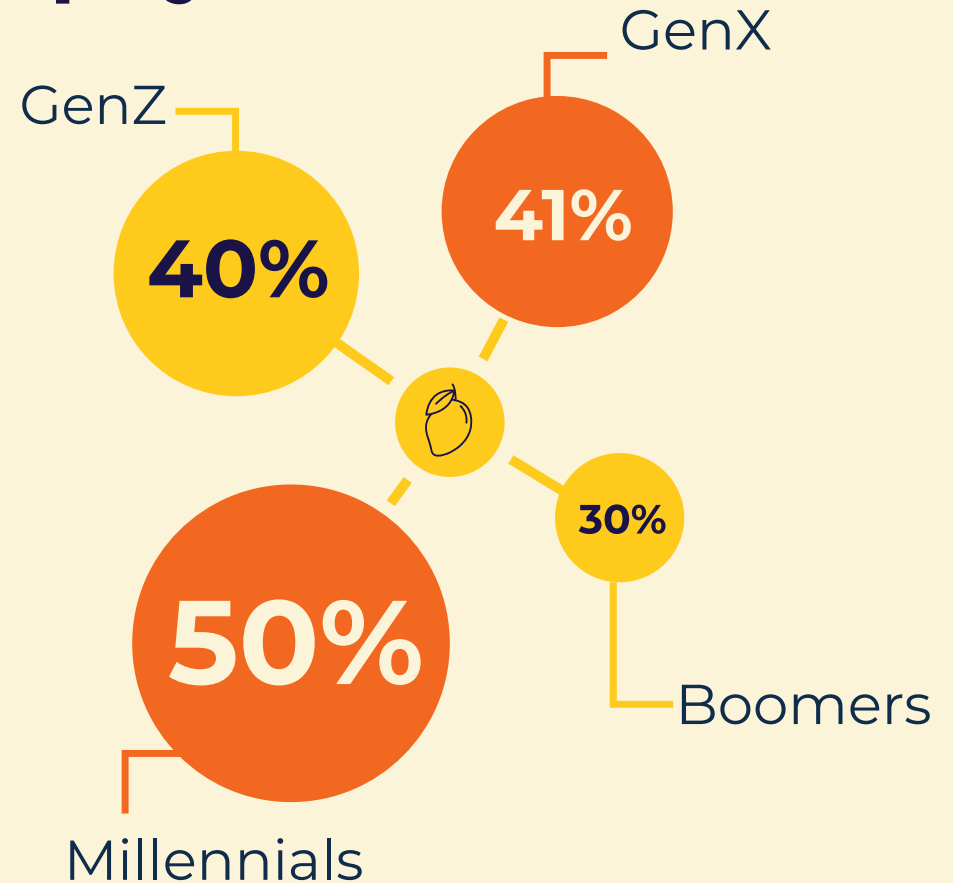




Mango Bags The Runner Up Trophy

Mango, the king of Indian fruits, takes the runner-up spot. Its sweet-tart flavour resonates with 50% of Millennials, capturing their adventurous palates. Gen X (41%) and Gen Z (40%) find its tropical touch appealing, while even the more cautious Boomers enjoy it (30%).

Perhaps it's the taste of summer or a connection to home, but mango's unique appeal cuts across demographics.



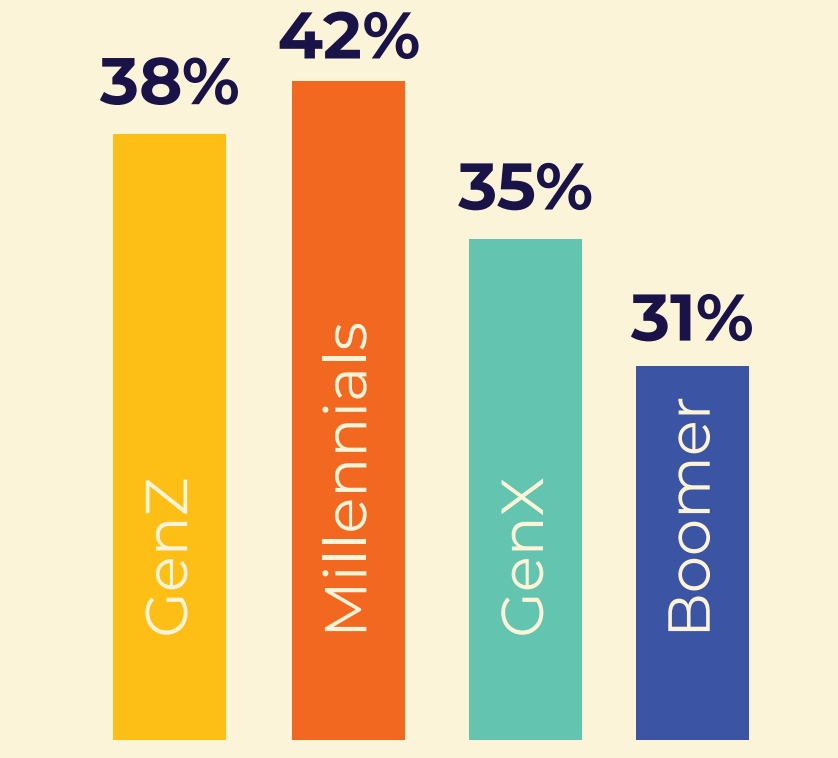


Everyone Likes Vanilla Once In A While

Vanilla, the dependable friend of the baking world, nabs the third spot. Millennials (42%) appreciate its versatility, while Gen Z (38%) finds its comforting sweetness a welcome indulgence. Gen X (35%) and Boomers (31%) value its familiarity, a flavour that's been a staple in desserts for generations.

Indians Are Sweet-Hearts!

This paints a fascinating picture of India's sweet tooth. While chocolate's dominance is undeniable, the love for mango and vanilla highlights a nuanced preference for familiar flavours with a touch of tropical flair.

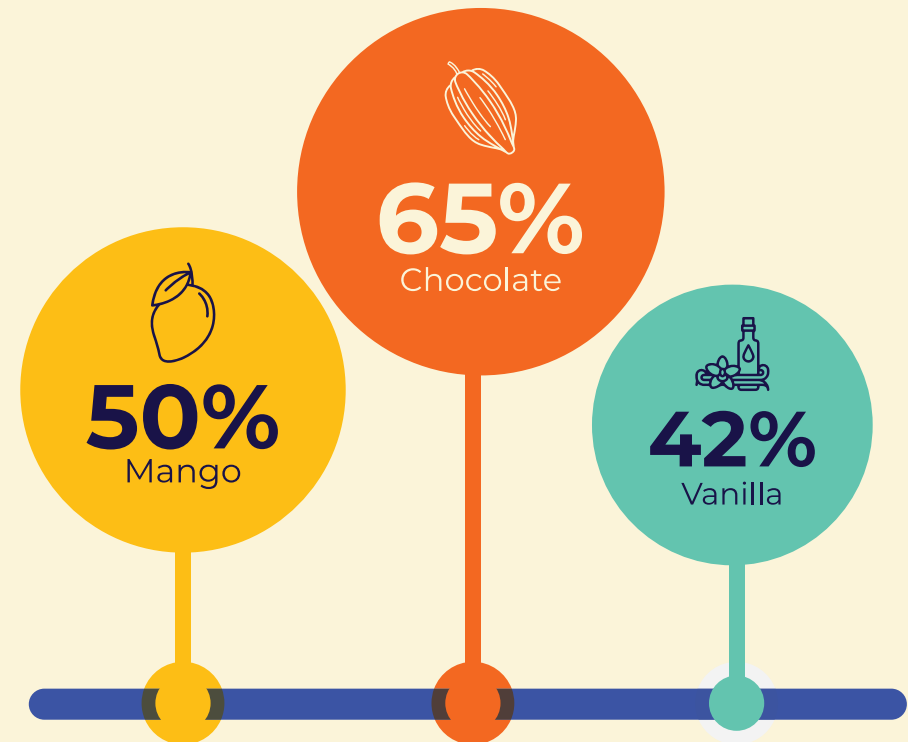


It seems when it comes to sweet treats, Indians crave comfort and nostalgia, with a sprinkle of adventure for good measure.



Summary

- Chocolate emerges victorious: from 65% of Gen Z to 40% of Boomers, everyone agrees it's the ultimate sweet escape!
- Mango mania is evident: from 50% of Millennials to 30% of Boomers, there's an irresistible allure for the flavour that the king of Indian fruits offers!
- Vanilla emerges as a timeless comfort: from 42% of Millennials to 31% of Boomers, proving that some classics never go out of style.



It seems when it comes to sweet treats, Indians crave comfort and nostalgia, with a sprinkle of adventure for good measure.

A Gen Z Twist To An Age Old Indian Tradition

India's Timeless Tea/Coffee Ritual Meets Gen Z's All-Day Munching!



“Chai - Nashta, Please”, Says Every Indian

Tea/coffee time is India’s official snacking ritual! A whopping 63% of Boomers, 61% of Gen X, and 51% of Millennials reach for a bite alongside their cuppa. Even Gen Z enjoys this ritual, with 58% indulging alongside their cup of tea or coffee.

The comfort of a familiar routine reigns supreme for some. Over 60% of homemakers, non-working individuals, and salaried professionals find solace in a tea/coffee and snack combo.

63%
Boomers

51%
Millennials

58%
GenZ

61%
GenX

It seems this is a timeless tradition that unites generations, offering a moment of pause and indulgence at the end of the day.



Snacking Compliments Moments

But millennials and Gen Z take snacking to a whole new level. They see snacking as an extension of their activities. Over 40% of Millennials munch while hanging out with friends, hitting the road, or getting lost in a show marathon.

Gen Z isn't far behind, with over 33% enjoying snacks at parties, with friends, or while glued to the screen – and yes, even during their tea/coffee break!



India's Snacking Habits Double On Saturdays & Sundays!

Home Alone, Not Snack Alone:
Homemakers Join India's Weekend Snacking



Snack Ends

Snacking in India is not just about convenience or hunger pangs; it's a way to unwind, connect with loved ones, and celebrate the freedom of a weekend. So, the next time you hear laughter and the rustle of snack packets coming from a house in India on a Saturday afternoon, you'll know exactly what's going on – it's just another "Snackend" in progress!

39% people snack twice as much on weekends as compared to the weekdays.

Maybe it's the relaxed atmosphere, the extra time for indulging, or simply the joy of having the family around. Whatever the reason, weekends in India are a designated time to loosen the belt and enjoy some guilt-free snacking.



It seems the pressure of work melts away with less commute, which is then replaced by a desire for delicious treats.

Beyond Cravings, India's Snacking Culture Is Surprisingly Complex

India Ditches Resolutions & Surrenders To Cravings

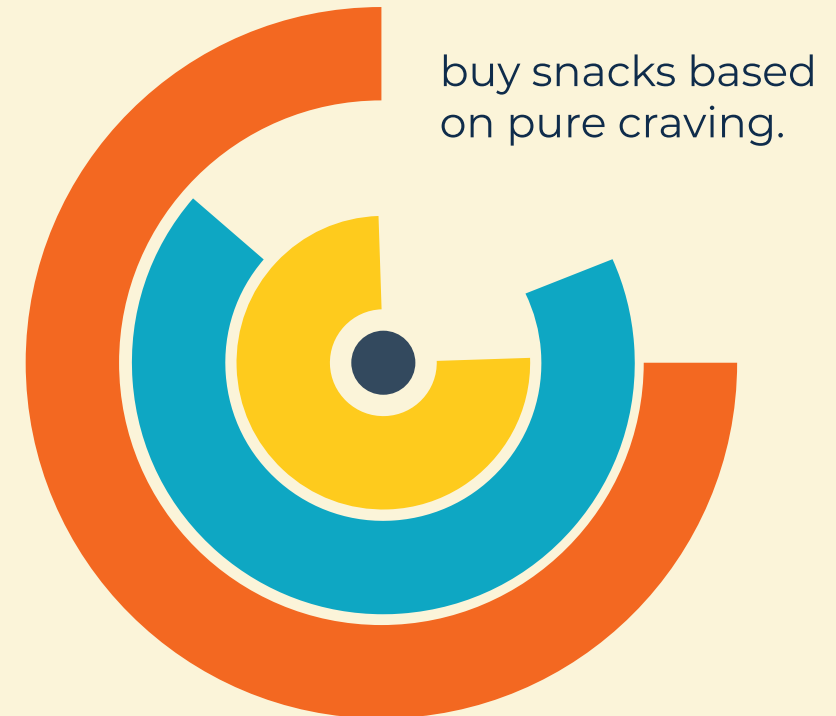


Can't Fight Them Cravings

When those cravings hit, Indians listen! A massive 59% of homemakers, 58% of salaried people, and even 65% of students readily admit to buying snacks based on pure craving.

It seems resisting those irresistible pakoras or that melt-in-your-mouth barfi is a challenge across professions and age groups.

Millennials and Gen Z, the champions of indulgence, take the cake (quite literally, perhaps?) with 60% and 58% succumbing to cravings respectively.



65% Students

59% Homemakers

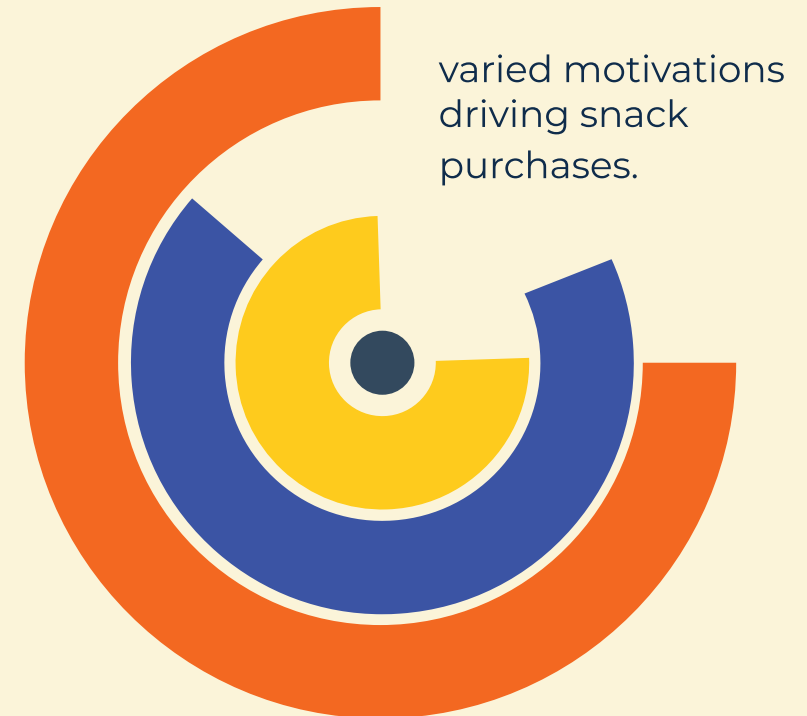
58% Salaried People



Diverse India With Diverse Snacking Cultures

India's vibrant snacking culture is a delicious mix between indulgence, habit, and even health-consciousness. So, the next time you see someone grabbing a snack in India, don't judge – you just might be witnessing the irresistible power of a craving in action!

It was found that cravings led the pack at 59%, closely followed by hunger at 43%, and the desire to replenish nutrients at 40%, showcasing the varied motivations driving snack purchases.



- 59%** Cravings
- 43%** Hunger
- 40%** Replenish Nutrients

Gen Z Embraces Makhana: The New Snacking Sensation!

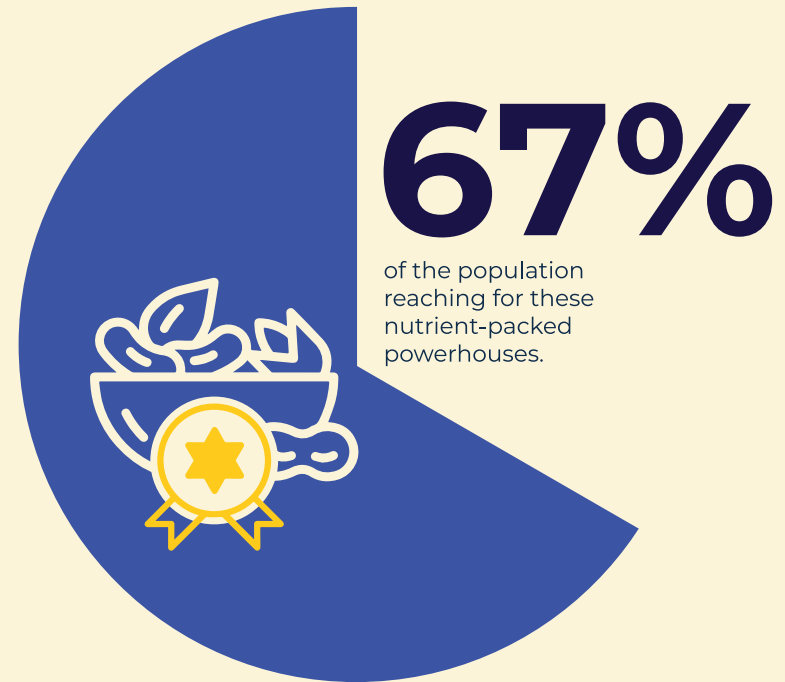
Dry Fruits & Makhana Dominate as India Snacks Smarter!



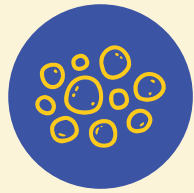
When Moms Said - Eat Dry Fruits, Indians Listened

India's snacking scene is undergoing a surprising transformation, with two heroes leading the charge: Makhana & Dry Fruits. Dry fruits are the undisputed champions, with a majority 67% of the respondents reaching for snacks that have the goodness of these nutrient-packed powerhouses. This proves that healthy choices can also be perceived to be truly delicious across generations.

Respondents shared that a satisfying crunch and a wholesome indulgence, are perfect for addressing the snack craving.



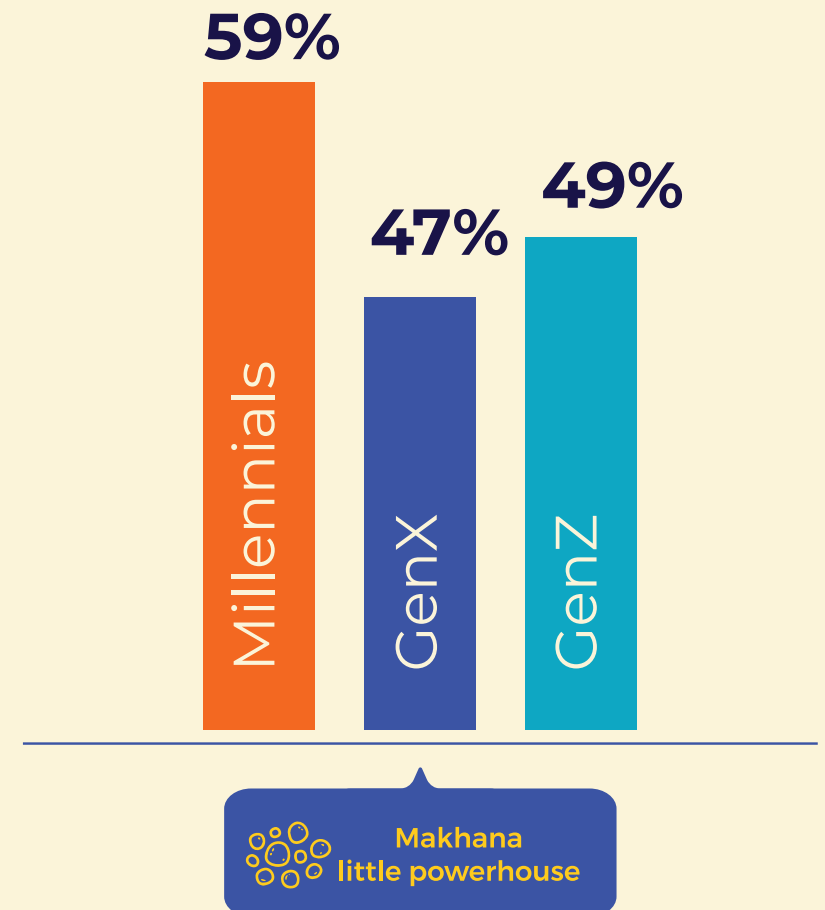
Makhana and dry fruits are emerging as the "snack stars" – delicious, nutritious, and perfect for satisfying those midday munchies without derailing health goals.



Makhana - An Age Old Snack In Innovative Avatars

But Gen Z throws a twist into the mix! While they appreciate the goodness of dry fruits, they're also a generation that craves variety. Enters Makhana, a popcorn-like superfood native to India.

This little powerhouse takes center stage for Gen Z with 49% choosing it as a top snack. Makhana offers a balance between healthy and fun - it's light, crunchy, and packed with nutrients, making it a perfect guilt-free indulgence. In fact, 59% of Millennials and a surprising 47% of Gen X also find themselves reaching for Makhana, proving its appeal goes beyond just Gen Z.



Health Takes A Bite Into Snacking!

Ditch The Guilt, Keep The Taste



Health & Taste - Why Choose One, When Can Have Both?

Indians are prioritizing health without sacrificing taste. Our data reveals the top three qualities Indians seek in a healthy snack:

Firstly, Indians are becoming increasingly calorie conscious (60%). Gone are the days of mindless munching.

Secondly, what's in your snack matters! 58% of Indians prioritize the "goodness of ingredients". This means opting for natural, wholesome ingredients like nuts, seeds, and whole grains.

Thirdly, artificial flavours and preservatives are getting the boot! A strong 55% of Indians actively seek snacks free from these additives. This focus on clean eating reflects a growing desire for authentic flavours and unadulterated ingredients.

1 Calorie Conscious

2 Goodness of Ingredients

3 Free from Additives

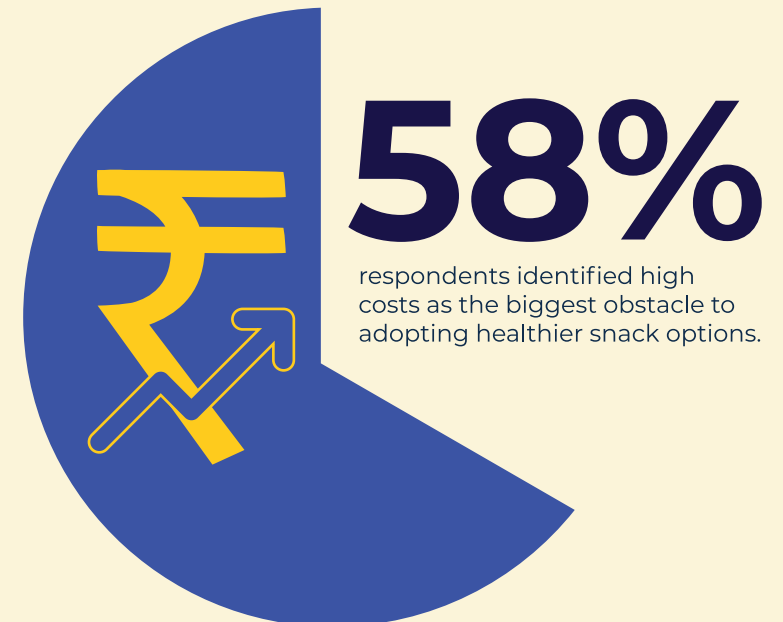


India Prioritizing Health Without Sacrificing On Flavour

The top two factors influencing buying decisions for healthy snacks were taste and financial accessibility.

While 73% of respondents said taste was the most influential factor, 58% of people revealed that high cost is the biggest challenge when switching to healthy options.

This creates a fascinating challenge and opportunity for brands.



Beyond Convenience:

Label Reading Fuels Desire For Wholesome Snacks In India



Reading Labels Is The New Normal

India’s snackers are becoming label conscious! 73% people, across all ages, are scrutinizing ingredient lists and nutritional values before tossing a snack in carts. This trend is particularly strong among boomers. A staggering 78% of those over 60 are decoding the fine print, likely prioritizing health and well-being.

Among those who do decipher the ingredient list, a staggering 93% yearn for healthier options. People are not just grabbing whatever’s convenient – they’re reading labels, making informed choices, and demanding better options. So, brands take note! The future of snacking is all about transparency, health, and deliciousness, and India’s waiting for its next healthy snack revolution.

Nutrition Facts

Serving size

Amount Per Serving

Calories

Calories from fat



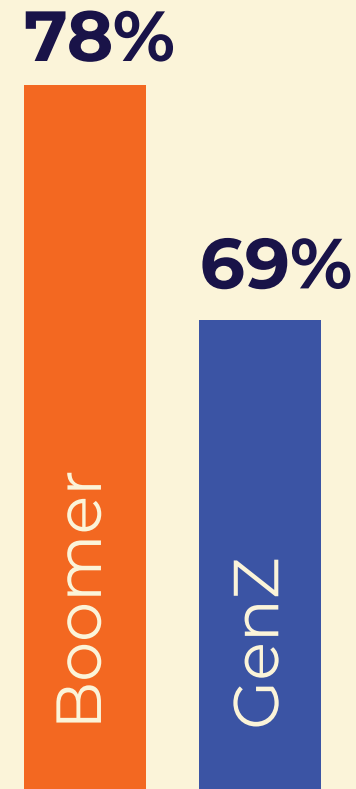
People are not just grabbing whatever's convenient – they're reading labels, making informed choices, and demanding better options.



Gen Z Seems Less Involved In Labels

But here's a surprising twist: Gen Z, the digital natives, seem less fazed by the back of the package. Only 69% of them crack the ingredient code, the lowest across all generations. Maybe it's the lure of trendy snacks or trusting those online reviews, but something's keeping them from becoming label conscious.

And the message is clear: India wants more healthy alternatives! Over 94% of all respondents are urging brands to hop on the health wagon.



People are not just grabbing whatever's convenient – they're reading labels, making informed choices, and demanding better options.



Summary

73% of Indians meticulously scrutinize product labels, with boomers setting the pace for informed consumption.

Gen Z lags behind with only 69% of them reading the labels, marking the lowest among all generations in their label scrutiny habits.

93% of label readers express a desire to transition to healthier options, highlighting a strong correlation between label reading and health-conscious choices.

Nutrition Facts

Serving size

Amount Per Serving

Calories

Calories from fat



Research Methodology

To capture a well-rounded perspective on India's evolving snacking habits, we employed a mixed-method research approach. This involved gathering data through both online surveys and offline interactions. The online survey allowed us to reach a broad and geographically diverse audience. To complement this, we set up pop-ups in various corporate offices & colleges. This offline approach enabled us to directly engage with potential snackers in their everyday environment, providing valuable insights into their snacking preferences and behaviors within their busy routines. By combining these online and offline data collection methods, we were able to obtain a comprehensive understanding of consumer trends in the Indian snacking market.

Limitations

Our survey on India's snacking habits offers valuable insights, but it's important to acknowledge some factors that may affect its accuracy. Firstly, the data might not represent in entirety a clear division in terms of genders. Secondly, distribution of respondents from each generation (Boomers, Gen X, Millennials, and Gen Z) isn't equitable, which could lead to results tilting towards the generation with maximum participation. Finally, the sample doesn't take into account factors such as socio-economic background and urban/rural divide, leaving scope for more detailed analysis on a pan-India level.

Conclusion

A fascinating transformation is sweeping India's snack scene. While taste remains the king, a wave of health consciousness is washing over the nation. Consumers are no longer satisfied with mindless munching – they crave a delicious and healthy snacking experience.

This survey revealed that consumers are becoming increasingly label-conscious, scrutinizing ingredients and prioritizing healthy options. Even Gen Z, along with their digital-first approach, show an innate desire for healthy choices.

Consumers are willing to invest in well-being, with a significant portion happy to pay a premium for healthy snacks, but affordability remains a key concern. Eco-consciousness is extending to snacking habits, with many prioritizing sustainable packaging, even if it means paying extra.

The future of Indian snacking hinges on striking a balance. Consumers crave deliciousness, prioritize health, and are increasingly mindful of the environment. Brands that can deliver innovative, healthy, and sustainable snack options at a competitive price point will lead India's next big snacking revolution. This revolution is fueled by taste, health, and a nation of discerning empowered snackers!



ABOUT FARMLEY

Farmley is centered around the idea of making snacking more wholesome, healthy and indulgent, based on the goodness of dry fruits. In today's world, customers are caught in the conflict of choosing between boring, bland healthy snacks, and guilt ridden unhealthy tasty options. We aim to evolve consumers' relationship with snacking, allowing them to indulge freely in delicious snacking options, minus the guilt. Farmley is reimagining dry fruits and nuts in lip-smacking flavours and innovative snacking formats. Our roasted peri peri makhanas, thai chilli cashews and delightful date bites are winning hearts as well as taste buds across the country. Our deep sourcing mechanisms, in-house production facilities and an innovative RnD team helps us come up with unique products that have the best of health & taste in every bite. Endorsed by former Indian cricket captain, Rahul Dravid, Farmley is emerging as the most loved new age wholesome snacking brand.



ABOUT IHSS

The inaugural Indian Healthy Snacking Summit, an unforgettable gathering set to revolutionize the way India snacks! Imagine a vibrant mix of influencers, community leaders, startup co-founders, and industry experts all under one roof, ready to sow the seeds to a better tomorrow of a healthier India. This event promises to be a one-of-a-kind experience that will leave you inspired and hungry for more.



HEALTHY SNACKING REPORT

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unveiled at



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