

Consumer Behaviour Trends in the F&B Industry

13 January 2025



Key Insights

1. "The Accidental Health Revolution: India's Snacking Renaissance"

- The convergence of health consciousness and tradition has created an unexpected democratization of healthy snacking - with high-protein snacks (24%) and ancient grains like ragi (9%) and millet (7%) moving from niche health foods to mainstream alternatives, signaling a fundamental shift in how India snacks.
- Traditional snacks are experiencing a "digital renaissance" with a remarkable 64% positive sentiment, indicating that social media and digital education are actually driving younger consumers back to their culinary roots rather than away from them.

2. "The Vegetarian Paradox: India's Double-Life Dining"

- A remarkable phenomenon of "dining duality" has emerged where consumers are creating a new category of "location-based diet choices" - being meat-eaters at home but vegetarians when dining out, driven by food safety concerns rather than religious or cultural factors.
- Trust has become the new currency in food choices, with 58% supporting vegetarianism not just for health but as a "safe harbor" in uncertain dining situations.
- Traditional beverages are seeing a revival with a 64% positive sentiment compared to just 14% for fast food chains, suggesting a complete inversion of the presumed "westernization" of Indian palates.

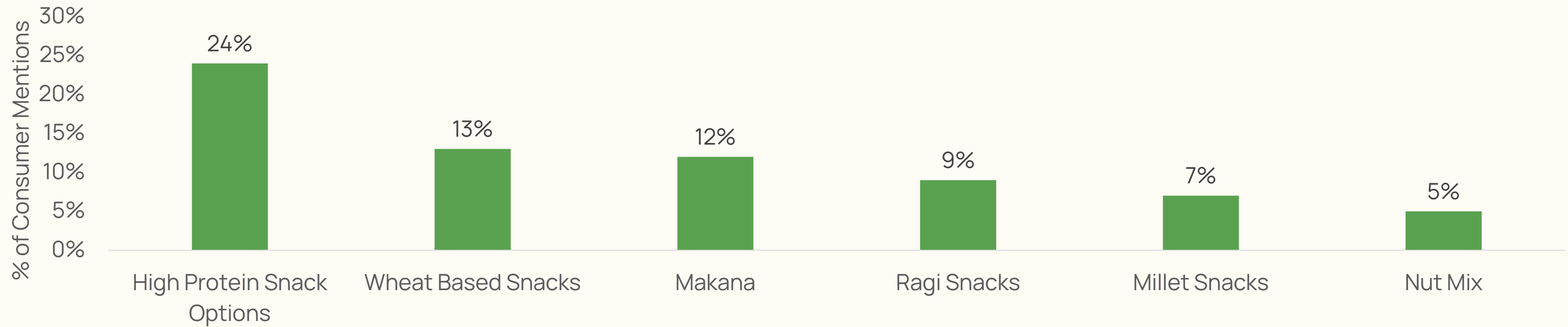
Key Insights

3. "The ONDC Revelation: When Cheaper Isn't Better"

- A startling display of consumer sophistication where 56% of users are actively choosing to pay more for reliable service over ONDC's discounted rates - defying the traditional price-sensitive Indian consumer stereotype.
- Despite 43% trial rate, only 13% retention reveals a profound truth: Indian consumers have matured beyond pure price considerations to value experience and reliability, marking a fundamental shift in service expectations.
- The rejection of ONDC despite its cost advantages represents a watershed moment in Indian consumer behavior, where service quality has definitively trumped price as the primary decision factor in food delivery.

Marked Interest in Healthier Alternatives – Palm Oil Awareness Likely Culprit

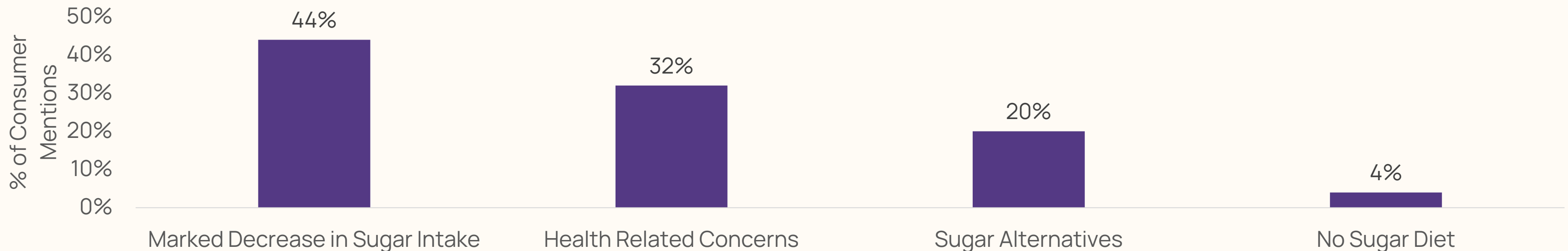
Consumer Mentions - Healthy Alternatives to Traditional Snacks



- Indian consumers are gradually shifting toward healthier snack alternatives, driven by a growing focus on fitness and ingredient transparency and rising awareness of palm oil's health impact. High-protein snacks lead the way with 24% interest, followed by wheat-based snacks at 13%, as brands like Too Yumm! spearhead this change.
- Traditional and nutrient-rich options like ragi (9%) and millet (7%) snacks are gaining popularity, with innovative products such as cheese-flavored ragi crisps and ragi nachos appealing to health-conscious buyers. Makana, a traditional Indian favorite, sees increased demand, with many opting for homemade flavored varieties over conventional chips.
- Nut mixes, at 5%, primarily attract high-income consumers, while middle-income buyers prefer wholesale dry fruits, reflecting diverse preferences across demographics.

The Sweet Tooth is Decaying – Consumers are Understanding Health Risks Related with High Sugar Intake

Themes of Discussion Around Sugar and Sweeteners



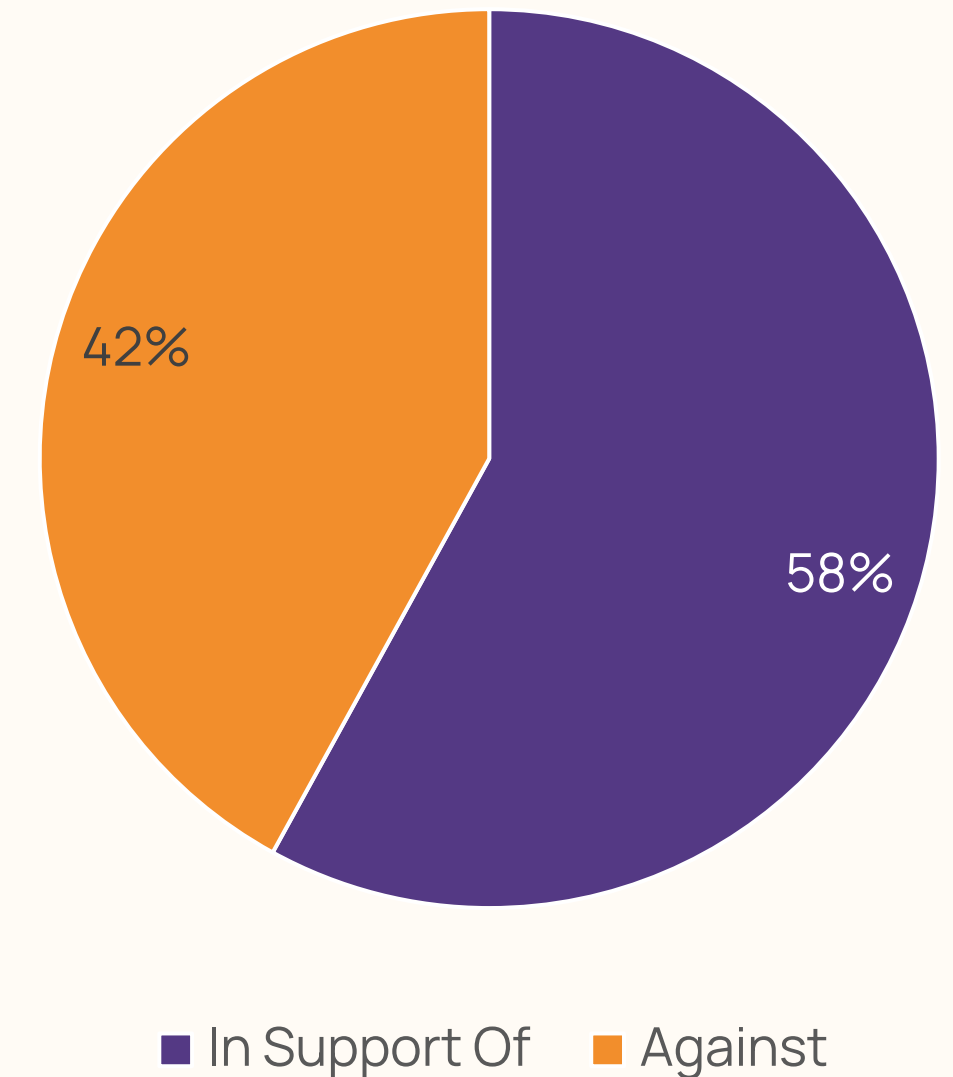
- The trend of reducing sugar intake is gaining traction among Indian consumers, with 44% reporting a marked decrease in their sugar consumption. This shift is not only aimed at improving physical health but also enhancing mood and reducing cravings for both sweet and savory foods.
- Health concerns are a significant factor, with 32% viewing sugar as a barrier to wellness, particularly for those managing diabetes or other health complications.
- While alternatives like sugar-free sweeteners, Splenda, and Stevia are available, many consumers remain skeptical about their side effects and potential negative impacts. Instead, they show a preference for healthier, portion-controlled substitutes like jaggery, honey, or rock sugar.
- Notably, a commendable 4% of consumers have taken the bold step of completely eliminating sugar from their diets. Although this transition can be challenging, those who have undertaken it report significant health improvements within just a month.

Source: Social Media Conversations – Reddit, Twitter, Instagram, YouTube – Sample Size : 13,143 Conversations;

Pseudo-Vegetarians on the Prowl : Prefer Meat at Home but Vegetarian Food Outside

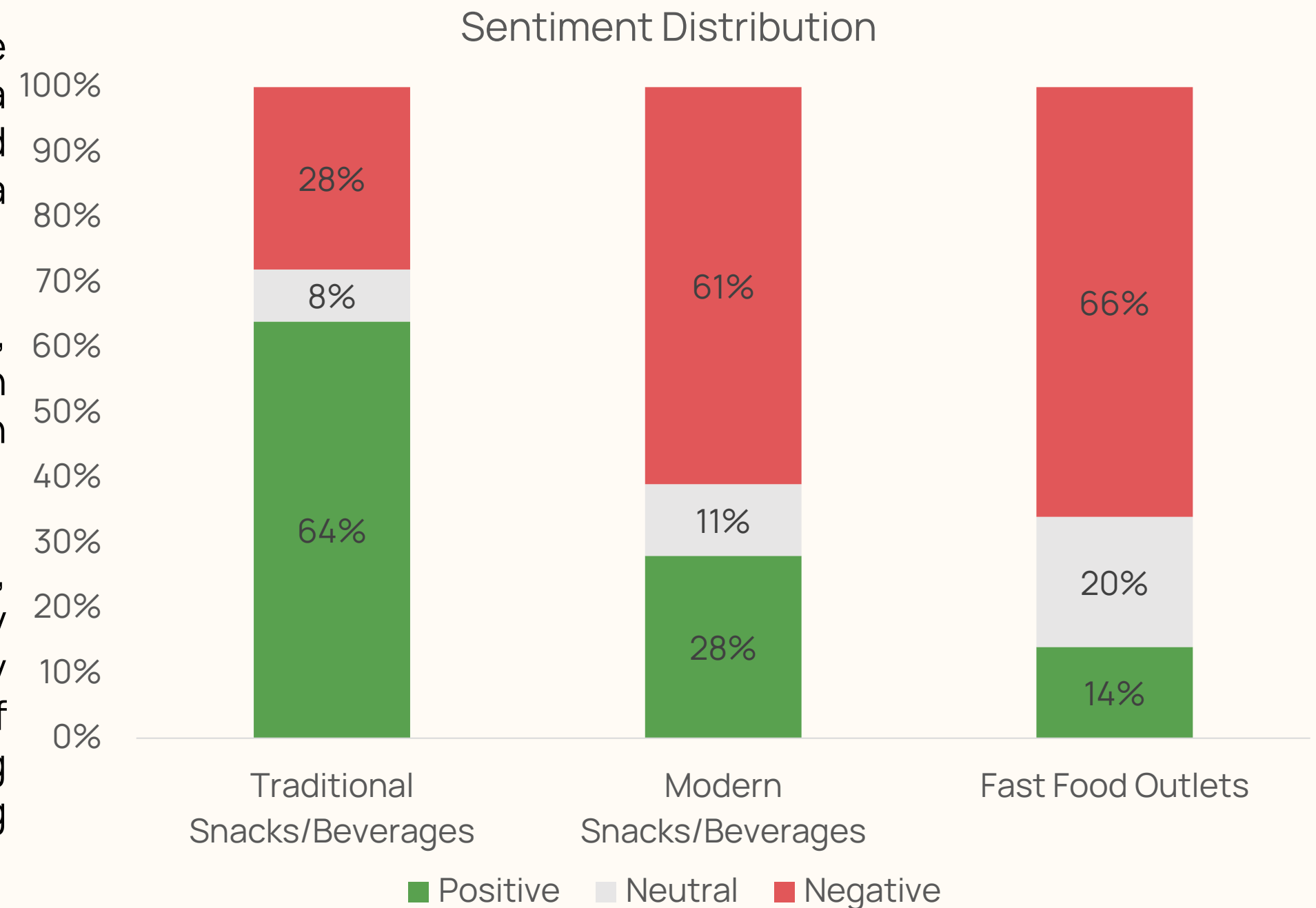
- In India, a remarkable 58% of consumers express support for vegetarianism, recognizing its benefits rooted in traditional teachings and health consciousness. Most consumers are hesitant to consume non-vegetarian food more than twice a week, preferring to limit meat intake for health and safety reasons.
- When dining out, many view vegetarian options as the safer choice, steering clear of potential adulterants and stale food unless they are confident in the reputation of a restaurant they have previously visited.
- The inclination toward **vegetarianism** reflects a broader cultural trend, where traditional dietary practices are appreciated not only for their health benefits but also for their role in promoting well-being. While 42% of consumers remain against the shift, the perception of **vegetarianism** as a healthier lifestyle choice continues to gain traction, influencing eating habits and preferences across the country.
- This growing awareness underscores the evolving landscape of dietary choices in India, where many consumers identify as pseudo-vegetarians, preferring to enjoy meat at home while embracing vegetarian food when dining out.

% of Consumers Recognizing Benefits of Vegetarianism



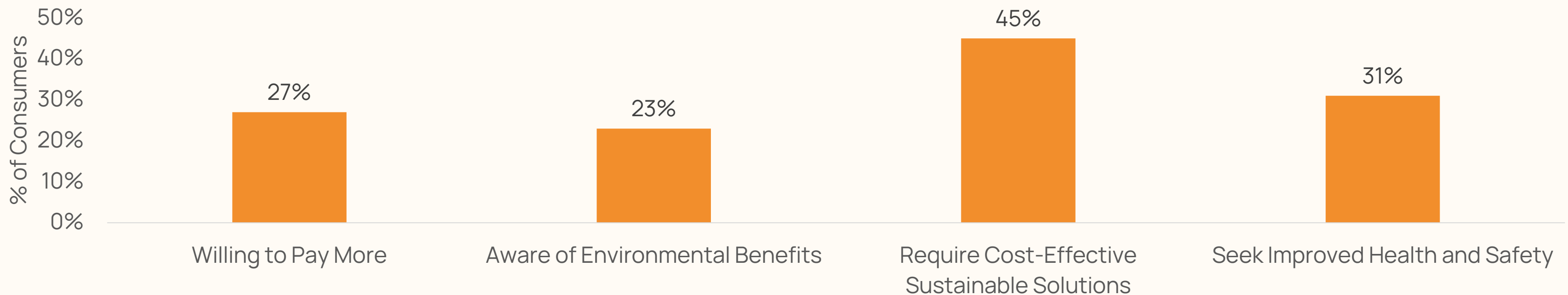
Tradition Over Modernity: How the Tides are Slowly Changing

- Traditional beverages and snacks such as lassi, sugarcane juice, coconut water, Solkadi, Rooh Afza, Neera, Makhana and dhokla are celebrated for their refreshing qualities and health benefits, featuring in 42% of discussions with a positive sentiment of 64%.
- In contrast, processed snacks and drinks like Haldiram's, colas, and energy drinks are heavily criticized for their high sodium content and unhealthy ingredients, appearing in 37% of conversations with a negative sentiment of 61%.
- There is a marked aversion to these processed options, and fast-food chains like KFC and McDonald's are similarly viewed unfavorably due to their unhealthy offerings. They fare worse in terms of sentiment, with just 14% of sentiments being positive, highlighting a strong preference for traditional over modern options among newer, digitally educated consumers.



Health, Tradition and Sustainability: A Trio of Importance in Modern Day India

Consumer Expectations on Sustainable Sourcing Practices in India

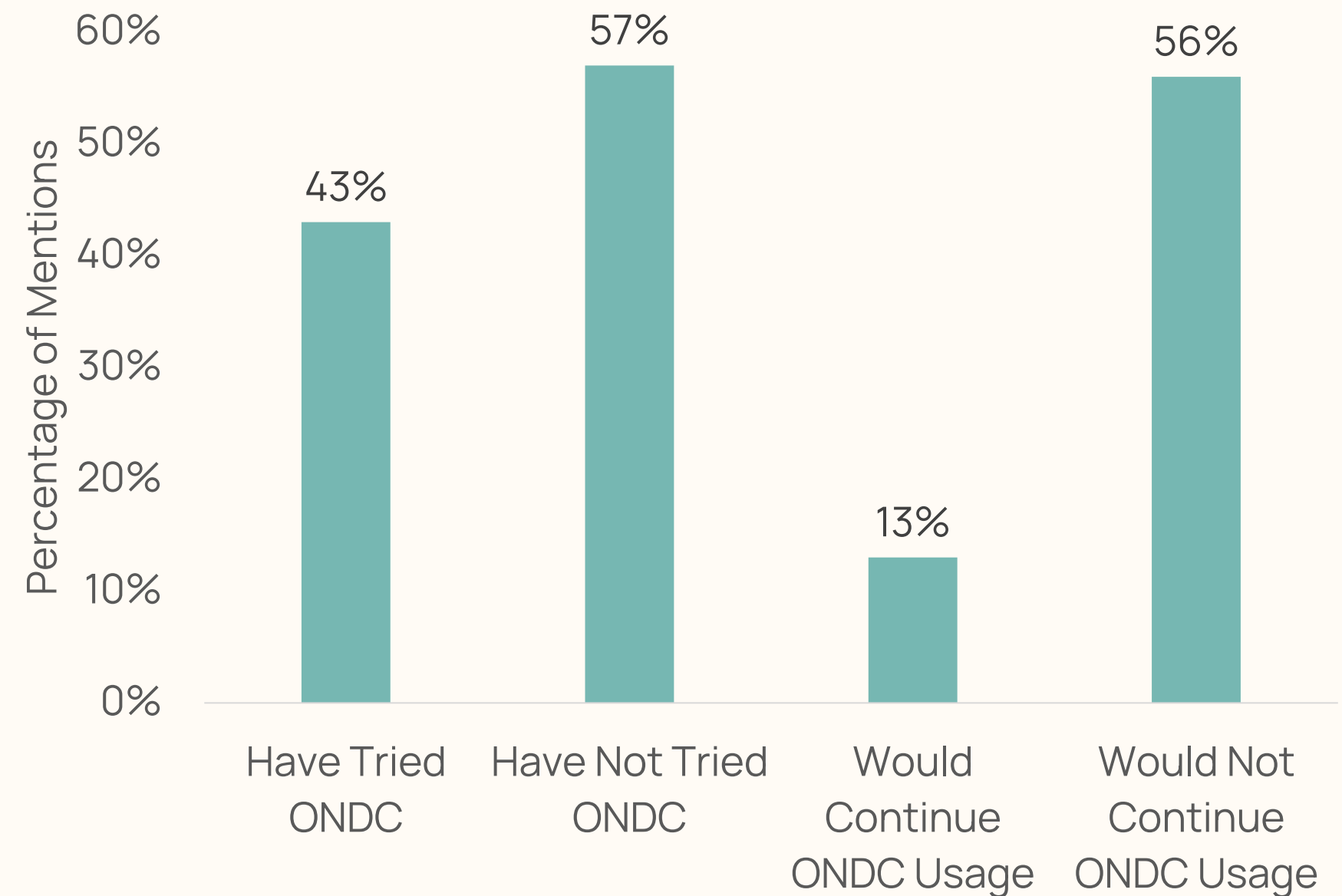


- Consumer expectations in India regarding sustainable sourcing practices in the Food & Beverage (F&B) industry are evolving significantly. While 27% are willing to pay more for sustainably sourced snacks and beverages, this is often linked to a desire for unique flavors and artisanal experiences.
- Additionally, 23% recognize the environmental benefits of such practices, favoring brands that reduce carbon footprints and promote local sourcing. However, 45% require cost-effective sustainable solutions, particularly impacting lower-income households.
- Finally, 31% seek improved health and safety standards, emphasizing transparency in ingredient sourcing and adherence to regulations set by the Food Safety and Standards Authority of India (FSSAI).

Despite ONDC Discounts, Consumers Would Rather Pay for Zomato and Swiggy's Superior Customer Service

- While ONDC has attracted attention with its lower rates and initial buzz, its execution has left much to be desired. Despite 43% of users having tried the platform, only 13% intend to continue using it, with 56% opting to return to more reliable options like Zomato and Swiggy.
- Key complaints include inconsistent delivery times, drivers failing to show up, and unresolved customer support tickets, which are often closed automatically within minutes.
- With 31% of consumers unaware of ONDC usage, its reputation for poor service overshadows its cost advantages, making users willing to pay a premium for the reliability offered by established platforms.

ONDC for Food Delivery - Statistics





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