PLANT-BASED MUTTON: KEY INSIGHTS AND PRODUCT ROLLOUT GUIDE

Image: Imagine Meats

INTRODUCTION

India ranks fifth in meat production in the world, with an estimated output of 8.6 million tonnes in 2019-20. Looking at mutton specifically, India's population of 218 million goats and sheep constitute an important species of livestock, contributing greatly to rural employment and protein supply. India happens to be the second largest producer of goat meat in the world after China, and in many Asian and Middle Eastern countries, meat consumption from both sheep and goats has been a long-standing tradition.

Today, consumption of mutton and other animal-derived protein sources is expected to increase, as incomes rise in low and middle income countries like India, populations urbanize rapidly, and the middle class demographic increases. In addition to these factors, in India, changing lifestyles, improvement in transportation, and storage facilities are also fueling the rapid increase in domestic consumption of animal-based food products.

Image: Imagine Meats

At the same time, there is a set of consumers who are becoming more conscious about their daily diets, looking at reducing their consumption of animal-derived meat for health, ethical, or environmental reasons. Unregulated meat markets, tropical climate conditions, inadequate slaughterhouse hygiene measures, and the lack of surveillance of meat-borne diseases further enhance the risk of health-related and occupational hazards.

As a result, plant-based meat is gaining acceptance, in keeping with trends all over the world. The plant-based industry is projected to be a **USD 100 million** market by 2030, and while North America and Western Europe are currently its two largest markets, China and India have the largest percentage of people who could be potential consumers of plant-based meat. While in India, consumption is still largely occurring within the early adopter cohort, it is picking pace rapidly. **1 in 4 early adopters claim that they would not want to consume animal-based products** like chicken, fish, mutton, and dairy or eggs in the future.

This guide provides key insights that will help manufacturers of plant-based meat in India successfully roll out plant-based mutton options for their consumers and target market by laying out do's, don'ts, and specific insights on the category. These insights are shaped by pairing consumer insights research conducted by GFI India, along with the learnings we've gathered from market rollouts in the plant-based meat category, both in India and other countries.

1

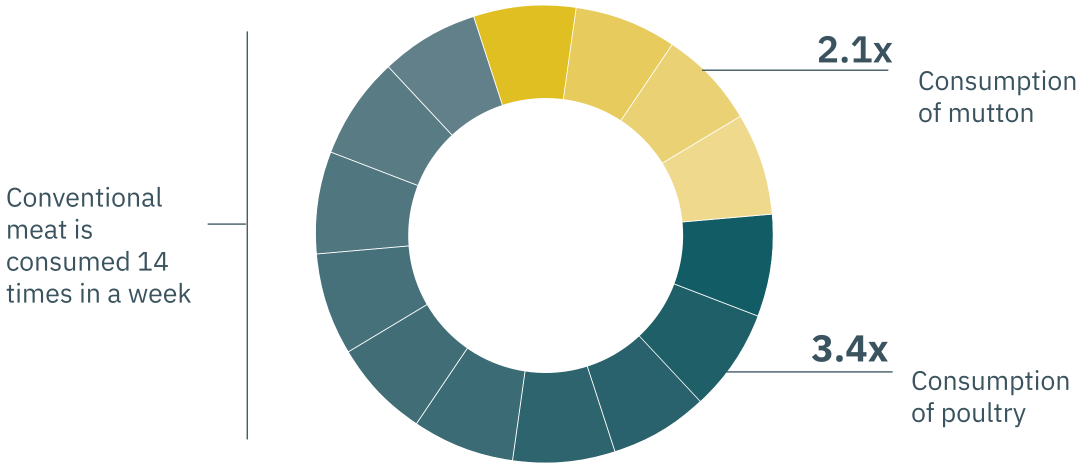
Who is the target audience for plant-based meat in India?

YOUNG (25-44) | HIGHER INCOME (MHI of INR 50,000+) | WELL EDUCATED (GRADUATES AND ABOVE) | LIVING IN URBAN AREAS | OMNIVORES

- **Younger** (25-44), **higher income** (MHI of INR 50,000+), **well educated** (graduates and above) people, living in **urban areas** and **omnivores** are the early adopters for plant-based meat in India. This cohort has a higher intent to purchase plant-based meats regularly (73% of them) and are willing to pay a price premium for plant-based meat over conventional meat (53% of them).
- **Early adopters are meat-eaters** with a high consumption frequency for conventional meat - almost 14 times a week spanning across breakfast, lunch, snacks, and dinner.
- Conventional meat consumption for these audiences has moved beyond **special occasions** and is now a part of their **weekday menus**. Their meat eating occasions range from normal weekday meals, to get-togethers, celebrations, festivals, marriages, office meetings, and more.
- 1 in 4 early adopters claim that they would **not want to consume animal-based products** like chicken, seafood, mutton, dairy, or eggs in the future. Product related barriers (hygiene of the meat procured, smell, ease of cooking, and heaviness on the stomach post consumption) along with increasing consciousness around animal cruelty, impact on planet, and personal health are some of the reasons why early adopters are looking at reducing their conventional meat consumtpion.

- 78% of early adopters have consumed conventional mutton in the last 12 months and **52% are willing to accept or try plant-based options for mutton in the future.**

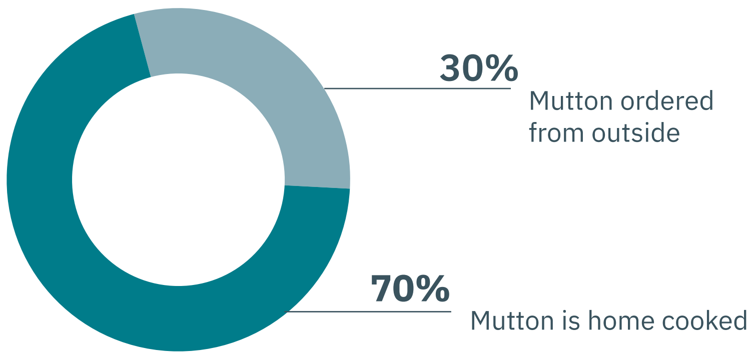
- Consumption of mutton is a weekly tradition or intimate family affair for many consumers, but is not a favorite during social occasions for reasons such as:
  - Mutton has a higher price compared to chicken.
  - Mutton may not be liked by all and is an acquired taste for many non-vegetarians in India.
  - Mutton brings with it the perception that it is difficult to digest.
- These attitudes are reflected in consumption patterns as well. Almost 75% of early adopters have consumed mutton in its conventional form in the last 3 months, compared to 84% for traditional poultry. Weekly penetration numbers for **mutton are at 48% compared to poultry at 76%.**



- Of the 14 times that early adopters consume conventional meat in a week, mutton is consumed about **2.1 times a week**, compared to 3.4 times for poultry.
- Lunch and dinner are the key parts of the day for consumption of mutton, accounting for 90% of the occasions. Only 9% of their recent occasions for consumption of conventional mutton were for breakfast and snacks.
- 59% of early adopters consume mutton both at home and out of home, while 29% of them have it only at home, and 11% of them have it only out of home.

2

What is the consumption behavior for mutton among early-adopters in India?



- For 70% of the occasions, mutton is home cooked and for 30% of the occasions it is ordered from outside, showcasing the opportunity for plant-based mutton in both food service and household kitchens.

- Mutton has a relatively **higher proportion of early adopters consuming only at home (29% vs 21% for poultry) or cooking mostly at home** (70% vs 60% for poultry) re-emphasizing the price sensitivity of mutton.

Image: GoodDot Mutton Bytz Biryani

3

What are the drivers for consumption of mutton?

- Since the **primary target audience is non-vegetarians,** plant-based mutton would be consumed for similar reasons as conventional mutton.

- At a spontaneous level, the top associations with conventional mutton for consumers are ‘delicious’, ‘indulgence’, ‘Sunday affair’, ‘spicy’, ‘satiating’, and other similar descriptors. At the same time, consumers also talk about mutton being expensive, an acquired taste, taking long to cook, requiring experience to cook, and other challenges. They also claim that it is difficult to digest, high in cholesterol, and not advised for older consumers.

- When we quantify all the key attributes associated with mutton, **taste is the primary driver of consumption.** As per the mutton lovers, the meat has a very **distinctive taste and gives the consumer the feeling of gastronomic overload.** Mutton scores higher compared to chicken on **“the aroma of cooking”, “experience of eating with bones”, “juiciness of the meat”, and “indulgence and satiation”.** It will be very important for plant-based mutton dishes to recreate the multi-sensorial journey of conventional mutton in terms of juiciness of the meat, smell of the meat being cooked, experience of eating the meat on the bone, satiation, and so on, to appeal to fans of traditional mutton.

- Apart from taste, **convenience** (the whole family likes it, it is easily available) and **health** (protein requirement, nutrition) are also the key reasons for the consumption of traditional mutton. **Paya soup is considered a good source of calcium** and mutton liver is considered high in vitamins and iron. However, there are also a few consumers who are concerned about the **ease of digestion and high fat and cholesterol of mutton.**

- Consumers rate mutton **slightly low on the ease of cooking**, compared to chicken. They feel mutton takes time to cook, and needs patience and experience. As per feedback, mutton needs to be roasted or cooked well to release the right flavors. Keema (minced meat) preparation is considered even more tedious.
- Mutton is considered 'premium meat' given its higher price and **scores low on affordability and value for money when compared to chicken.**
- While mutton lovers claim that the taste, indulgence, and experience of eating with bones is unparalleled to other meats like chicken, it lags behind in terms of price, ease of cooking, ease of digestion and high fat content. **Plant-based mutton could use some of these opportunities to position their products as unique, while still delivering the taste of conventional mutton.**

Image: Shaka Harry Mutton Keema

PRODUCT DEVELOPMENT

PACKAGING

PRICING

POSITIONING

DISTRIBUTION

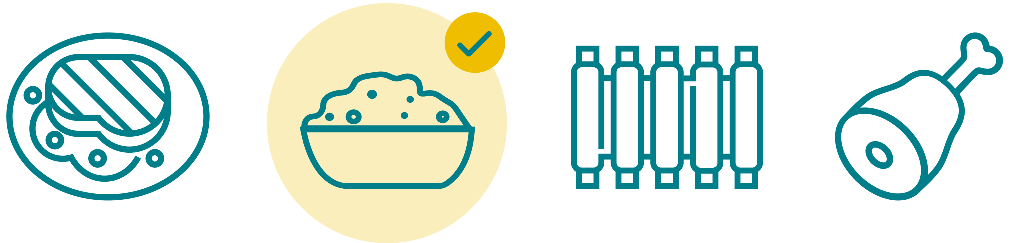
4

How do we go about developing a marketing mix for plant-based mutton?

- As seen in section 3, mutton has distinguished benefits and clear drawbacks - both of which can be used to build a robust marketing mix for plant-based mutton.

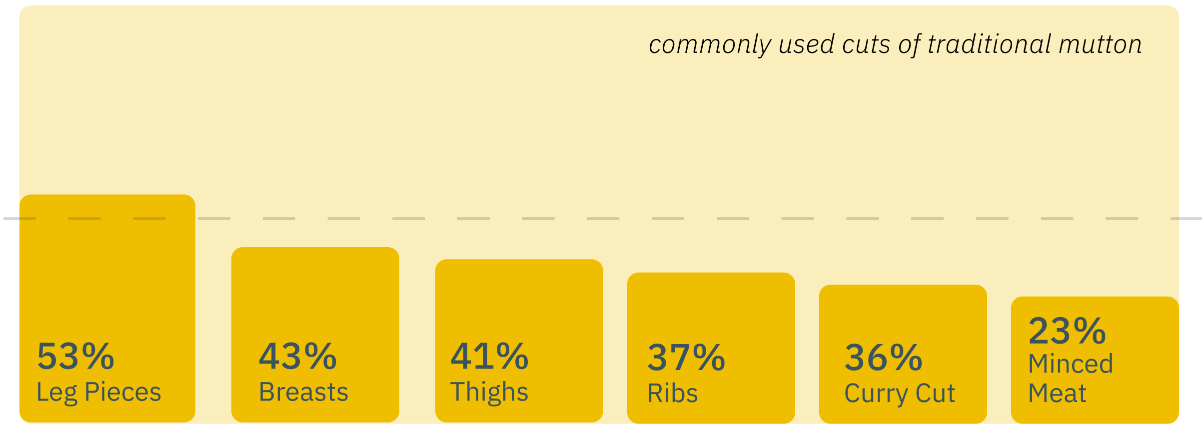
4.1. PRODUCT

- For conventional mutton, consumers prefer younger animals (<2 years). Taste, texture, color, and juiciness of the plant-based mutton has to match conventional mutton drawn from an animal that is younger than 2 years old.



- Unlike chicken, consumers are not picky about cuts in mutton. However, they believe that **picking the right mutton and keema (minced meat) comes with experience.** A few consumers believe in picking the animal by themselves. **Plant-based options can make this process of buying simpler** by offering good and consistent quality every time.

  - The most commonly used cuts of traditional mutton are leg pieces (53%), breasts (43%), thighs (41%), ribs (37%) and curry cut (36%), with keema (minced meat) being used at 23% of occasions.

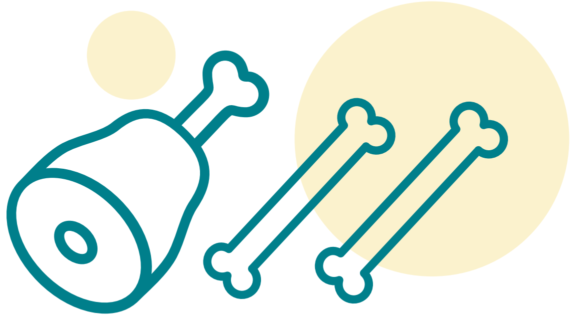


- Fresh meat is preferred when it comes to mutton, and 69% of the time mutton procured is fresh. However, marinated (28%) and ready to cook (29%) mutton offerings are also making in-roads with consumers. Building on the same trend, there is an opportunity for innovation across formats for plant-based mutton - from frozen to refrigerated to shelf stable.

  - The Indian plant-based meat market already has brands experimenting with frozen formats of mutton (Blue Tribe Foods, Shaka Harry, Greenest, and so on) as well as with shelf stable mutton products (GoodDot). It's also interesting to note that a recent study done by Kroger Retail in the US suggested that plant-based meat sells better in the (refrigerated) meat section, as compared to anywhere else.

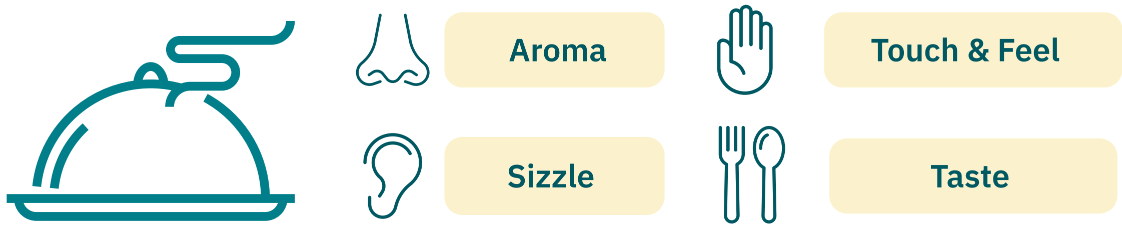
- Since the category is new in India, having consumers try plant-based meat products via variations of popular menu dishes is the best possible way to get them to experiment. The same has been proven in the US, where familiar contexts, formats, flavors, and preparations resonated well with consumers. Most manufacturers recreated formats that are popular in the conventional meat form - burgers, meatballs, sausages, ground meat, and so on.

- Looking at formats that work well for India, **mutton curry, mutton biryani, mutton dum biryani, mutton kebabs, mutton masala, and mutton rogan josh** are the most loved mutton products. According to consumers, mutton is **not perceived to be as versatile as chicken,** and its use is relegated to a few curries, kebabs, and keema. Consumers also think that it is difficult to make these dishes at home and takes a lot of time. These factors could all be opportunities for plant-based mutton to shine and could be **entry points for plant-based mutton manufacturers.**



- **Eating with the bone** is a very important attribute within mutton consumption. While developing plant-based mutton products, it's important to focus on developing formats that are close to the conventional meat including ones that give consumers the opportunity to eat meat with bones.

- Most consumers mention that cooking mutton or keema is a long drawn process. Mutton is roasted on a slow flame to dissolve the fat content and to draw out a richer taste. Sometimes, if the mutton is still hard, roasting is followed by pressure cooking. Keema is even trickier to make as there is sometimes a lot of blood involved and needs to be cleaned multiple times before cooking, which can be sensorially distressing for many consumers. Post cleaning, it again needs to be roasted until all the fat is dissolved. **Plant-based meats can build upon these process-related barriers viz. cleaning, long cook times, and so on** to appeal to early adopters without compromising on taste.



- When innovating within the smart protein segment, **prioritizing the multi-sensorial experience the dish promises is key,** rather than just focusing on what the dish is. For example, while launching plant-based meat products one should ask, "What is the experience I am creating? What role does conventional meat play in this experience?" rather than, "What part of animal meat do I need to replace?" **Think about aroma, texture, and mouth-feel.**

- In India, we also need to think about products that offer plant-based meat in its final cooked form, and not just in its raw form. For example, you need to consider that there will be different mutton chunks in a curry versus a biryani. Mutton is not a singular type of meat and has many applications, flavors, and textures, according to the dish it is in.

- Some of the **sensory cues** that needs to be recreated for plant-based mutton are:

  - Color has to be dark pink or red. If it is white, it is considered stale or considered to have too much fat. Keema must be dark red in color.
  - Meat should be more juicy and soft and not hard and chewy.
  - While roasting, the smell of raw mutton should melt away and transform into the aroma of cooked meat.
  - In curries or gravy-based dishes, there should be a layer of oil on top, and the curry should be deep red in color.
  - It should be relatively spicy as non-spicy mutton is considered not tasty.

- While developing products for restaurants, it is important to ensure:

  - **Versatility:** SKUs that can be used for multiple dishes.
  - **Similar prep procedures:** SKUs that can be cooked and prepared similar to conventional mutton, with faster turnaround time.
  - **Similar equipment:** SKUs that can be cooked with existing equipment used to cook conventional mutton.

4.2. PACKAGING

Packaging Standards

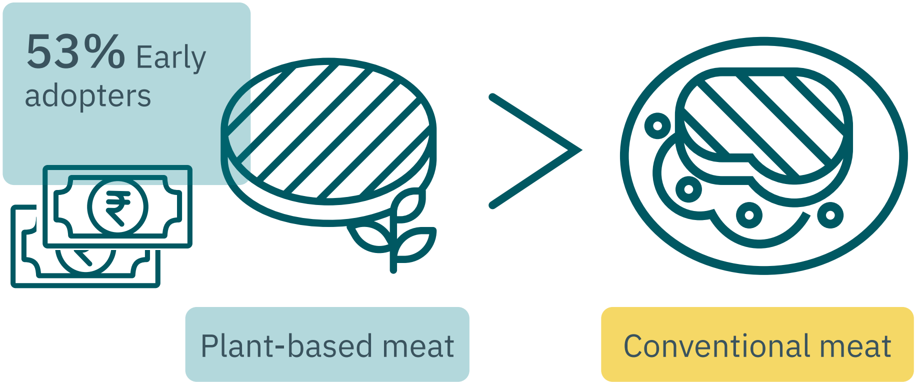
Preferred pack size	500gm / 1kg
Packaging material	Sustainable
Important information	Nutrition facts, Protein content, and Ingredient list.

- On an average **1.3 kg** of conventional mutton is consumed for each occasion by the early adopters:
  - 500 gm to 1 kg accounts for 33% of the occasions.
  - 1 kg to 1.5 kg accounts for 29% of the occasions.
  - 1.5 kg to 2kg accounts for 19% of the occasions.
- **Therefore, 500 gm and 1 kg** could be key pack sizes for plant-based mutton to start with.
- For consumers, along with the product barriers that conventional meat brings with it, the move to plant-based meat is also influenced by sustainable lifestyles and the desire for a better future for the planet. Hence, plant-based mutton manufacturers have to keep in mind that environmentally conscious consumers are also often concerned about the **sustainability of packaging.**
- In a study conducted by GFI India with plant-based dairy users in India, it was found that the majority (90%) of the consumers of the category tend to pay **attention to the labeling** on the products. They check both the front of the pack and back of the pack. Besides looking for the date of packaging/expiry date - which is the most commonly checked criteria for both plant-based and animal-derived foods - consumers of plant-based dairy also paid attention to the **nutrition facts, protein content, and ingredient list.** This could be stemming from the fact that plant-based protein as a category is relatively new compared to animal-derived protein, and we expect the same trend to play out for plant-based mutton as well.

- Using the **term 'plant-based' as the primary identifier** rather than vegan or mock meat is very important to access the largest target audience and not alienate any segment of the consumer base. The terminology of 'plant-based' is most universally accepted as 'warm', with a 'farm to table connotation' and is the 'least excluding' term according to the consumers. This nomenclature also taps into larger food trends playing out in the industry.
- Good pictures and appetizing descriptions of products work well. Focus on the positives while labeling and **avoid perceptions of deprivation like 'mutton-less, and so on.**

Image: Just Dig In! Seekh Kabab

4.3. PRICING

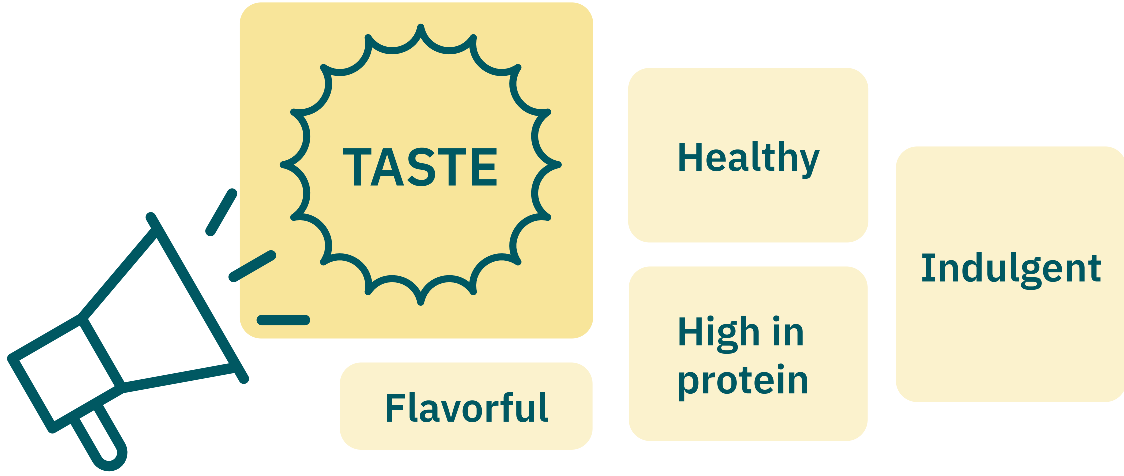


- **53%** of early adopters of plant-based meat in India are willing to pay a price premium for plant-based meat over conventional meat.
- In a qualitative survey conducted by GFI India within the foodservice industry, around half (46%) of consumers are willing to pay a **price premium of 10-20%** above conventional meat.
- On an average **INR 662 is spent for 1.3 kg** of mutton by early adopters in India. For a protein that is already considered expensive by the consumers in India, it would be tough to reach a wider audience if price points for plant-based mutton are too high compared to price points for conventional mutton. Manufacturers will have to study the market to understand the price premium that they can charge to start with.

  - For example, Haldiram's partnered with BVeg Foods to launch plant-based mutton samosas and keema pav at just INR 29 and INR 45 respectively and Indian companies have been running extensive promotions to make products more affordable.
- Beyond Burger - which was selling for about USD 12 a pound while conventional ground beef was USD 5 a pound - has announced value packs for summer barbeque season, pricing their patties at USD 6.40 per pound, bringing their price point closer to conventional beef as a limited time offer. Beyond Meat also claims to be on track to meet price parity with at least one plant-based product by 2024.

4.4. POSITIONING

- Eating meat in the Indian context is not just a food choice. It's a way of life, deeply rooted in emotional and cultural associations. Consumption of meat is also associated with affluence and is considered to be a signifier of social status. Therefore, it is important for plant-based meats to build on the aspirational angle to be able to win against conventional meat.



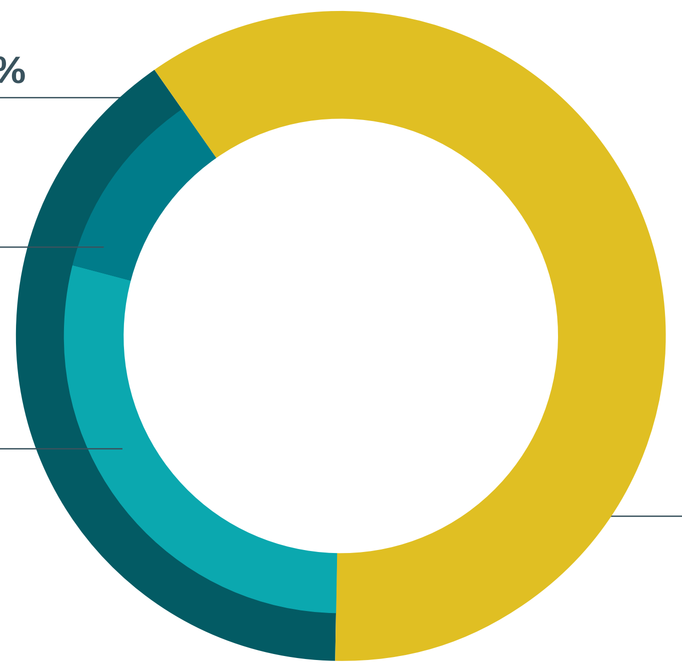
- Looking at the case studies from across the globe, marketing is extremely important when it comes to driving plant-based meat consumption, and **taste has to be the primary message within marketing campaigns and product promotions.** Positioning plant-based mutton as flavourful and **indulgent**, and emphasizing on its meaty flavor and protein content has worked well.
- **Mutton consumption occasions revolve mostly around family**, ranging from regular weekday menus (55% of the mutton eating occasions), to get togethers with family (48% of the mutton eating occasions), and Sunday or weekend special meals (44% of the mutton eating occasions). Positioning around the key occasions of consumption with family can be a good starting point.

- Plant-based mutton also has to evoke similar feelings that conventional meat does when consumed. **'Felt energetic', 'felt indulged', 'felt nourished', and 'craving was satisfied'** are some of the top reactions to a meal with mutton.
- Around 20% of reactions were also about feeling heavy and 16-17% of reactions were about having difficulty with digestion and feeling lethargic and sleepy.
- Non-vegetarian cooking, especially mutton, is seen as an elaborate and time consuming affair, not as quick and easy as making vegetarian food. Therefore, less 'kitchen or cooking time', along with highlighting positive motivations that non-vegetarian consumption is linked with - self expression, satiation, self gratification - can work well.
- Plant-based mutton can try to balance both the advantages and health perils associated with conventional mutton by positioning itself as "indulgent, rewarding, faster to prepare, and easy to digest", without the heaviness or guilt associated with conventional mutton.

Image: Imagine Meats - plant-based mutton

4.5. DISTRIBUTION

- Plant-based meat as a category has created awareness and buzz through **food service outlets** globally, and then made its way to the consumer's kitchens through retail outlets.
- While high awareness is seen among global QSRs, awareness among other players in the industry is also encouraging. As per a qualitative survey conducted by GFI India with the stakeholders in the food service industry, **28% of them are aware of plant-based meats currently and 72% of them are likely to try retailing plant-based meats** if the price and sensorial experience matches up to conventional meat. Tie ups with existing meat distributors via HORECA or online channels can help in exploring distribution synergies with the food service industry.
- Plant-based meat manufacturers also have to be competitive on the **credit period** offered by the conventional meat suppliers. A credit period of **30-60 days** minimum is ideal in order to be competitive with conventional meat suppliers.



- Early adopters buy conventional mutton from **traditional retail** for **60%** of occasions and from **modern retail** for almost **40%** of the remaining occasions. Within modern retail, **27% is from online meat stores** like Licious, Zappfresh, Fresh To Home, etc. and **13% is from the supermarkets or hypermarkets.** Plant-based mutton could follow the same trend and explore synergies for distribution with modern retail, especially online retail.
- **Food tech - online food delivery** - has now made its presence in more than 500 cities in India, with Swiggy alone offering services in 500+ cities and Zomato in 300+ cities. Tie ups with these aggregators could be a good opportunity to reach the right audience across India. It's also worth noting that Swiggy Instamart is already stocking different plant-based products, which can be found under their regular 'meat and eggs' segment, and is delivering plant-based meat in key metros within 15-30 minutes of consumers placing their orders.

References

1. A Deep Dive Into the Early Adopters of Plant-Based Meat in India: Understanding their profile, attitudes, and consumption occasions via quantitative data by GFI India
2. Plant-Based Meat in India: A Qualitative Study on Attitudes and Opportunities for Smart Protein by GFI India
3. Insights into Procurement, Operations, and NPD of the Food Service Industry by GFI India

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ABOUT GFI INDIA

Since our establishment in 2017, GFI India serves as the central thought leader and convening body in the space of plant-based, cultivated, and fermentation-based meat, eggs, and dairy that are collectively known as the “alternative protein” or “smart protein” sector.

With unique insight across the scientific, policy, industry, and investment landscapes, we are using the power of food innovation and markets to accelerate the transition of the world’s food system toward smart proteins. In building the sector from the ground up in India, we’re aiming to establish a model for its growth all across the developing world. The Good Food Institute India (GFI India) is part of an international network of nonprofits with partners in Brazil, Israel, U.S., Europe, and the Asia Pacific, on a mission to build a healthy, sustainable, and just global food system.

To learn more about our work and the smart protein ecosystem in India, visit us at www.gfi-india.org or on social media.

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