

# INSIGHTS ON PACKAGING AND LABELING for plant-based meat and dairy in India



\*This image is for illustration purposes only and does not signify the actual nutritional content.  
All claims (including nutritional and health claims) on the packaging and other places are to be as per the FSSAI regulations.

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# EXECUTIVE SUMMARY

As a relatively new category, the nomenclature, brand identity, and consumer marketing for plant-based meat and dairy continue to evolve. Though the early adopters in India are somewhat familiar with the category, there is a clear gap in comprehension of the category and various terms and nomenclature used by the manufacturers. This gap is more pronounced for plant-based dairy, where the conventional terminology is restricted. **Consumers are often confused about the category and the use of the product in the absence of descriptors like milk, cheese, butter, etc on the packs.** They try to comprehend the category through visual cues, like images, color, and shape of the pack. Keeping in mind the lower level of awareness for plant-based meat and dairy and restrictions on nomenclature, packaging, and labeling should be created with the objective of helping consumers understand the category and product. It should also provide all the essential information needed to differentiate the category from animal-derived packs.

Terminology like **plant-based and vegan** mentioned prominently on the front of the packs helps consumers understand the product and differentiate it from conventional meat and dairy. Of the various names used by the manufacturers, plant-based has the highest acceptance among consumers and caters to a broader audience. For categories like plant-based dairy, in place of conventional terminology, **alternative terms can be derived based on the ingredients used and/or the perceived utility of the product.** For example, descriptors like almond beverage, plant-based protein drink, and plant-based mozzarella/cheddar can be used. In the case of meat, mentioning the protein (chicken, mutton, etc.) and qualifiers like plant-based and vegan helps consumers relate to the product. Apart from the nomenclature, manufacturers also can use **visual cues like the shape of the pack, color, and images** to convey category-relevant messaging to consumers. Keeping the shape of the plant-based packs similar to popular packaging recognized for animal-derived packs helps with an intuitive connection to the category. For example, consumers relate tubs to ice creams, block-shaped packaging to cheese/butter, and cartons to milk. On the other hand, green-colored packs or green-colored text on the pack cues plant-based to many consumers. Images of the product on the pack help identify the category and understand the look and feel of the product.

**Nutritional and ingredient information and claims** provide early adopters confidence in switching from animal-derived products. Plant-based dairy packs should contain health-related claims where applicable. Consumers noticed claims like **no added sugar, rich in nutrients, healthy, and no preservatives** on plant-based dairy packs. For a category like plant-based meat, which is driven by taste, claims like **just like chicken, just like mutton, 0% meat, 100% taste, and 100% yum**, along with health-related claims like **zero cholesterol, and trans fat-free** are appreciated by the consumer. High protein is an important claim for both plant-based meat and dairy packs. Since the target audience is a dual user of both plant-based and animal-derived products, it is not advised to use claims that criticize traditional animal-derived products.

Companies can refer to [this](#) mini guide on advertisement and claims for further information.

# INTRODUCTION

The alternative protein category in India is new and niche. Among the early adopters, close to 30% of the consumers are familiar with plant-based meat, and nearly 50% with plant-based dairy. However, among the consumers who have heard of the category, only 5% of respondents are moderately or extremely familiar with plant-based meat and 12% with plant-based dairy. In such a scenario where the category is not deeply entrenched in the minds and lives of consumers, the manufacturers need to design packaging and labeling that explicitly indicates the category and its benefits in compliance with the FSSAI's regulations. All elements of the pack, including the shape, color, text, symbols, and images, have to be designed to grab the consumer's attention and provide them with accurate information in an easily understandable way. Besides compliance with regulatory policies, the product's labeling and terminology must be relevant and credible to accurately communicate its sensory profile, key ingredient(s), and plant-based nature.

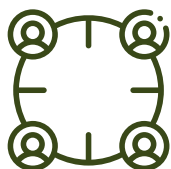
The Good Food Institute India partnered with Sprint AI to conduct a market study to understand the consumer perception about existing packs of plant-based meat and dairy in the market and develop insights that can help manufacturers in India with consumer-relevant labeling practices.

## Key information areas

- Decoding consumers' perception of labeling on the existing packs of plant-based meat and dairy in the market
- Identifying the terminology that resonates well with the consumers from a shortlist of names for plant-based meat and dairy
- Providing insights on elements that can drive consumer understanding of these categories along with differentiating the packs from conventional dairy and meat products

## Research methodology

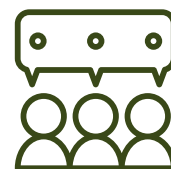
The research used a new-age qualitative-led approach by building online micro-communities. It was a three-week-long immersion that involved a combination of:



Mini-group discussions



Surveys



Activity-led inquiries in the micro-communities

TOTAL SAMPLE SIZE: 30

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## Profile of the respondents

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- In the age group of 25-44
- Male and female (in the ratio of 50:50)
- NCCS A1
- Monthly Household Income (MHI) of INR 150K and above
- Living in Delhi, Mumbai, and Bangalore
- Non-vegetarians and vegetarians (in the ratio of 75:25)
- Users and non-users of the category (50:50)
- Users are respondents who have consumed plant-based meat and dairy in the past 12 months.
- Non-users are the respondents who are aware of the category but have yet to try the category.
- A small group of early adopters of plant-based and vegan lifestyles were also part of the research.

# **SECTION 01**

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## **KEY FINDINGS**

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**DECODING CONSUMER  
PERCEPTION OF LABELING  
ON THE EXISTING PACKS  
OF PLANT-BASED MEAT  
AND DAIRY IN THE MARKET**

## 1.1.1 PLANT-BASED MILK

### WHAT WORKED

- + **Health benefits and ingredient information stood out for many consumers across packs**
  - Health benefits were either understood directly as stated on the pack (refer to the [Regulatory Guide on Advertisement and Claims](#) for more information) or via the mention of the ingredients.
  - Specific benefits related to vitamins, calcium, etc., were noticed.
  - The use of terms like unsweetened reemphasized health benefits.
  - Ingredient pictures like those of almonds cued the health and intuitive composition of the product.
- + **Consumers noticed visuals and text that cued plant-based**
  - Consumers noticed the terms plant-based and vegan on the packs. These terms helped consumers differentiate plant-based products from animal-derived.
  - Consumers noticed the visual representation of ingredients (wherever present).
  - Consumers also noticed shapes or visuals that cued plant-based. (For example, the letter O written in the shape of a leaf on the packs of So Good's plant-based dairy packs was noticed.)
  - Claims such as 100% (e.g., 100% dairy-free) reassured consumers about the product's composition.

### WHAT DIDN'T WORK

- Consumers considered plant-based milk an **option for pre/post workout (protein drink) and an alternative for juices and sugary drinks rather than conventional milk.**
- None of the packs of plant-based milk thoroughly convinced the consumers that they could be alternatives to regular dairy milk, especially for tea and coffee.
  - Understanding of words like 'barista' was limited to a few consumers.
  - Wherever the words or symbols related to plant-based or vegan were not present or prominent, it led to some confusion regarding the nature of the product.

## 1.1.2 PLANT-BASED CHEESE

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### WHAT WORKED

- + **Familiar category-related words helped.** Mentioning words like mozzarella or cheddar helped establish that it is an alternative to animal-derived cheese products.
- + **Images led to an intuitive connection with the category.** The image of the foods where the product can be used helped establish the connection with the product.
- + **Color was an important cue for the category.** Yellow-colored packs of Soft Spot's cheese alternative reinforced the category to the consumers and were well-appreciated.
  - Consumers noticed words like **plant-based/vegan** on the packs.
  - Some of the claims, like **dairy-free and lactose-free**, helped create a better understanding of the category.

### WHAT DIDN'T WORK

- Packs that didn't mention vegan or plant-based terms confused the consumer about the product category.
- Most packs could not establish the product's **taste and texture** (stretch). Since cheese is a taste-first product (instead of health), it is important to convince the consumer of the indulgence and taste aspect of the product.
  - Claims like 'authentic vegan' or 'conscious vegan' confused the consumer. They weren't sure if these products were 100% vegan or hybrid, especially in the case of words like 'consciously vegan.'

## 1.1.3 PLANT-BASED BUTTER

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### WHAT WORKED

- + **Green-colored packs and symbols like leaves** instantly cued plant-based to the consumer (e.g., the symbol of leaves on the packs of Plantaway's butter alternative).
- + **Ingredient information** such as nuts and fruits mentioned on the pack **cued health** to the consumers.
- + **Highlighting product attributes** such as gluten-free, palm oil-free, trans-fat-free, and cruelty-free **enhances the element of goodness** of the product.
  - **The use of adjectives like buttery** helped consumers establish that this is an alternative to butter.



## WHAT DIDN'T WORK

- Though consumers were able to understand that the product is an alternative to butter, packs could not establish the relevance of this product to consumers. Since consumers perceive plant-based foods to be healthy, they didn't think plant-based butter offered any additional health benefits over regular butter.
- Packs were not able to cue taste, health, or any usage occasions, leading to a weaker connection with the consumers.

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## 1.1.4 PLANT-BASED ICE CREAM

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### WHAT WORKED

- + Mention of terms like **vegan and dairy-free** caught the attention of the consumer.
- + **Clear and bold mention of the flavors** helped establish the product's taste.
- + The packs' colors and shapes helped cue the category in the scenarios where the word ice cream was absent on the packs. However, this understanding required probing and was not intuitive.
  - Ingredient information cued healthiness, and neat packaging allowed the consumer to absorb all the information without getting overwhelmed.
  - Packs like White Cub's ice cream alternatives were considered modern and premium. The consumers deemed the packaging fit, given their perception of the category.

### WHAT DIDN'T WORK

- The absence of the term ice cream on the pack confused the consumers.
- Though there was an image of an ice cream scoop, the absence of the word ice cream or dessert led to confusion.

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## 1.1.5 PLANT-BASED YOGURT

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### WHAT WORKED

- + **Familiar brands like Epigamia instantly cued the category for consumers.** Many consumers also noticed the term plant-based on the packs.
- + Mention of claims like **unsweetened** helped build the **perception of health** in the minds of the consumer.
- + The **images and mention of ingredients** also helped consumers understand the product better.

### WHAT DIDN'T WORK

- When a brand is too familiar, consumers sometimes don't end up paying attention to the packs, and they assume that the packs of alternatives are also regular dairy or yogurt products.
- The taste similarity of plant-based yogurt to regular yogurt (despite reading all the information on the pack) did not convince the consumer.
- Words like blend used as an alternative to the word yogurt or curd did not help much in identifying the category.

## WHAT WORKED

- + **Taste and texture are two must-haves** for the consumer to appreciate plant-based meat. Plant-based meat packs that were able to convince the consumer of the taste parity using accurate and catchy phrases, garnered greater attention.
- + **Consumers used different cues to build the element of taste.** For example, in PlantAway's Mutt'n Keema Masala, the ingredients helped establish the taste. Providing a dip or chutney inside the pack and mentioning the spice level on the pack also cued the taste for the consumer.
- + **Images played a role in establishing texture.** Images of the product (nuggets, kebabs, etc.) on the front of the pack helped the consumers identify how the product could look, feel, and taste.
  - **Meat is associated with high protein.** Packs that mentioned protein content or claimed to be high in protein caught the consumer's attention. Similarly, **health benefits, especially claims like zero cholesterol**, attracted the consumer.
  - **A clear qualifier (plant-based or vegan)** was noticed by the consumer and played an important role in confirming the absence of real animal meat.
  - **Packs in shades of green** reinforced that the product was plant-based.
  - **Brand names that suggested plant-based (e.g., Greenest or Shaka Harry)** helped the consumer comprehend the product better.
  - **The consumer appreciated packs that mentioned no cruelty or no animal cruelty.** They liked the element of consciousness attached to the product. It played a role in motivating them to try plant-based meat.
  - **Mentioning the protein (chicken or mutton)** helped consumers accurately identify and visualize the sensory experience, such as look and feel, aroma, taste, texture, and aftertaste of the product. Packs that didn't have the specific protein mentioned left some consumers confused about what sensorial attributes to expect from the product.
  - **Consumers noted essential information like portion size**, number of pieces, etc., especially when it was on the front of the pack.
  - Most consumers were able to establish that the plant-based meat packs were an alternative to meat.

## WHAT DIDN'T WORK

- Wherever there were no images of the product on the pack, consumers were unable to visualize the product and were not convinced about the taste or texture.
- Packs that did not prominently mention plant-based or vegan confused the consumer about the product.
  - Additional qualifiers (such as geographical references to Sindhi/Awadhi, etc) confused the unfamiliar consumers who could not understand the significance of such terms. This holds for products in general and not only for plant-based categories.

## **SECTION 02**

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**IDENTIFYING THE  
APPROPRIATE TERMINOLOGY  
THAT RESONATES WITH  
CONSUMERS**

Out of the various names used by different manufacturers, **plant-based** and **vegan** had the highest connection with the consumers. Most consumers were able to recognize and understand the term plant-based as something derived from plants. Since the category is new, it is ideal to name the product with the **category name and a qualifier** of plant-based or vegan so that consumers are clearly able to identify the product. Terminology linking the product to its conventional counterpart, like plant-based milk and plant-based cheese, made it easy for the consumer to understand its use.

Some of the alternative terms that can be used for plant-based categories can be derived on the **basis of the ingredients used and/or the perceived utility of the product.**

- For example, **almond, oat, and soy beverages** had the highest resonance with consumers in the absence of the word milk. The term **plant-based protein drink**, which signifies the functionality, was also well accepted by consumers. Some other similar terms that can be used are plant-based beverage and plant-based drink.
- Terms like plant-based drink mix, non-dairy whitener, etc., can be used for milk powders.
- For cheese, names specifying the functionality of the product, like **plant-based mozzarella, cheddar, or parmesan**, etc., were most relevant and easily understood by the consumer.
- **Plant-based spread or plant-based dip** are some of the other words that can be used for both plant-based butter and cheese. Other qualifiers like just like cheese, use it like butter and buttery spread make it easy for the consumer to understand the product and the category, provided they comply with FSSAI regulations.
- Rhyming words like cheeze, sheese, nutter, etc., didn't resonate with the consumers.
- Frozen dessert, gelato, ice-pop, sorbet, etc., can be some of the words that can be used for ice creams, along with the qualifier of plant-based.
- **Vegurt** was a widely accepted term for plant-based yogurts.
- **Plant-based meat and vegan meat** were the most accepted terms for plant-based meats. Qualifiers such as tastes just like chicken or tastes just like mutton, made with plants, veg meat, and smart protein make it easy for consumers to understand and relate to the category.

## **SECTION 03**

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**VISUAL AND VERBAL CUES  
FOR DEVELOPING THE  
PACKAGING AND LABELING  
OF PLANT-BASED MEAT  
AND DAIRY**

# VISUAL AND VERBAL CUES FOR DEVELOPING THE PACKAGING AND LABELING OF PLANT-BASED MEAT AND DAIRY

03

We asked consumers to pick the packs of plant-based dairy and meat that they liked, were easy to understand, and conveyed all the essential information needed to differentiate between plant-based and animal-derived packs. They were also asked to co-create an ideal design for a plant-based meat or dairy pack. Some of the insights that emerged from these 2 exercises are as below:

- **Consumers noticed vegetarian or non-vegetarian logos and used them to differentiate products.**
  - The majority of the consumers were aware of the vegetarian and non-vegetarian logos (green and red dots, respectively) and used them to differentiate between products, especially in cases where they were not too familiar with the product or category.
  - While the vegetarian and non-vegetarian logos have existed for many years, the vegan symbol was only introduced recently in the Indian market. Owing to this, not many consumers were familiar with or could identify the vegan symbol.
  - Once the vegan symbol was explained, many consumers appreciated its existence and elements, such as its green color and the depiction of leaves to indicate the absence of animal products.
- **Bright and bold block colors captured the attention of the consumer.** Most packs preferred by consumers used elements of green either in specific text or on the packaging. Images of leaves or some representation of plants were used as cues by consumers to differentiate plant-based packaging from others. Quirky, offbeat packaging earned good reviews.
- **The shape of the packaging also served as a cue for the product category.** For example, consumers intuitively expected plant-based cheese alternatives to come in block-shaped packaging, plant-based milk alternatives in tetra paks, and plant-based ice cream alternatives in tubs. Since the category is considered modern and premium, consumers expected the packaging to also reflect the same.
- **Product images on the packaging played a crucial role in helping consumers** identify both the nature and the expected taste of the product. For example, an image of a block of cheese or a bottle of milk on the packaging helped consumers identify the contents, especially in cases where conventional dairy terminology was absent on the packaging. Images also helped consumers deduce the appearance, taste, and texture of alternative meat products.
- **Terms like plant-based and vegan** helped consumers differentiate plant-based products from animal-derived ones.
- **Mentioning the type of protein being replicated helped consumers associate with the product.** For plant-based meat products, consumers preferred if the name of the protein, like plant-based chicken or mutton, was clearly mentioned. In cases where the protein type was

not specified, consumers were uncertain about what to expect from the product and how to use it.

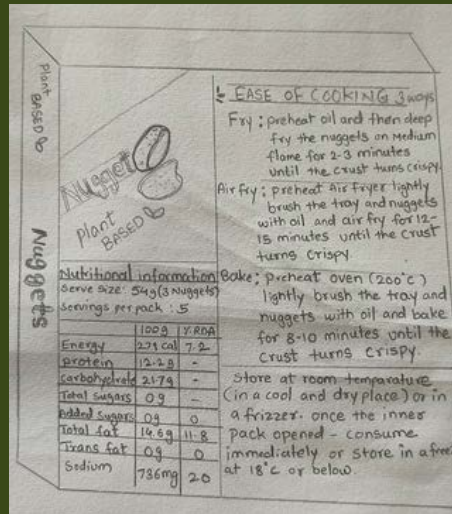
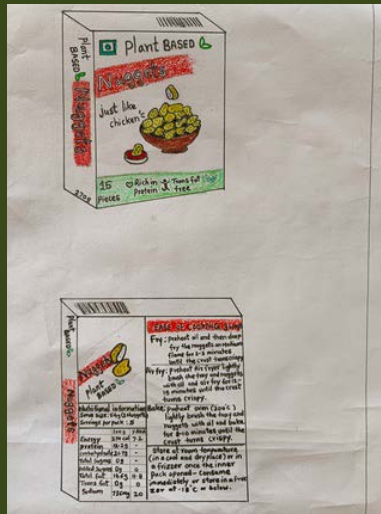
- **Health-related claims were particularly important for consumers of plant-based milk alternatives, while taste claims resonated more with those interested in plant-based meat alternatives.** On plant-based dairy alternative packaging, claims such as no added sugar, rich in nutrients, healthy, and no preservatives were appreciated by consumers. For taste-driven products like plant-based meat and cheese, cues related to taste were crucial. Taste claims such as just like chicken, just like mutton, tastes like meat, and 0% meat, 100% taste effectively conveyed the taste profiles. Claims like zero cholesterol, no preservatives, and trans-fat-free conveyed the healthiness of the product. **High protein was also an important claim to be made for both meat and dairy packs.\***
- **Familiarity with ingredients played a key role in consumer choices.** For example, the use of words like soya or almond helped them set their expectations with respect to the product's taste and texture.
- **Clarity of labels and nutritional information helped.** Early adopters preferred packs that offered clarity in terms of ingredients, preservatives, additives, and nutritional information. This preference stems from a desire to make informed choices or transitions.
- **Claims about animal cruelty did not significantly motivate consumers** to replace conventional animal-derived products with plant-based alternatives. Plant-based options were primarily considered as alternatives for animal-derived meat during festivals and religious observances when meat consumption was prohibited.
- **Consumers resonated well with the formats and flavors that were familiar to them.** Given that the category is still emerging, these familiar formats and flavors helped consumers identify and relate to the products. For example, the plant-based versions of different non-vegetarian or vegetarian kebabs were more easily understood by consumers and set clear expectations about the product.

\*Claims can only be made as per the Food Safety and Standards (Advertising and Claims) Regulations, 2018.



# Illustrations of some of the packs designed by consumers for plant-based meat and dairy:

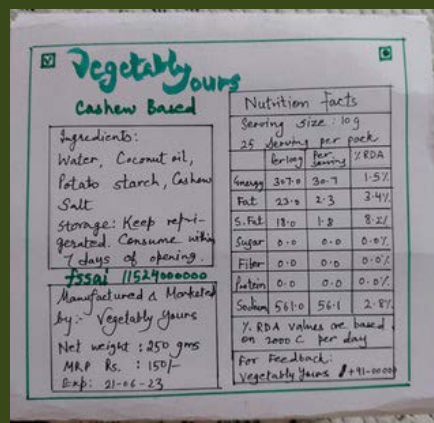
## Plant-based meat: Kavita



## Plant-based milk: R Sharma



## Plant-based cheese: Avneet



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# CONCLUSION

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Packaging, labeling, and the information on ingredients and claims on the pack play a key role in the purchase decision for new categories. For plant-based meat and dairy, prominently mentioning qualifiers like **plant-based and vegan**, along with the use of the **vegetarian logo** on the pack, helps consumers differentiate these products from animal-derived products. Mentioning the **protein being replicated**, viz. chicken or mutton, along with images of the product, sets expectations with the consumers. For categories like dairy, where the conventional terminology can not be used, alternative terms can be derived basis **the ingredients used and/or the perceived utility of the product**. Apart from terminology, manufacturers can also use **visual cues like the shape of the pack, color, and images** to convey category-relevant messaging to consumers. **Claims of health and taste**, as per the FSSAI regulations and depending on the category, also generate consumer interest.

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Since our establishment in 2017, GFI India has served 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.