INSIGHTS ON AWARENESS, TRIAL, AND PURCHASE BEHAVIOR - PLANT-BASED MEAT AND DAIRY, INDIA

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EXECUTIVE SUMMARY

Building awareness is the critical first step in the marketing funnel for building any category. Though the category is new and niche, close to over **30% of the respondents in the target audience were familiar with plant-based meat and 50% with plant-based dairy.** We observed higher awareness levels among the younger age group (25-44) with a monthly household income (MHI) of INR 100K to 150K. Non-vegetarians (flexitarians) living in metros had higher awareness levels compared to vegetarians and consumers in non-metros cities. Internet, word of mouth, and in-store/e-commerce displays were the key sources of category awareness for plant-based meat, dairy, and eggs.

Of all the consumers who were familiar with the category, 11% tried plant-based meat, and 23% tried plant-based dairy. Though the trials were relatively low, the category exhibited **high repeat purchase intent**, with 72% of the consumers who bought plant-based meat in the last six months considering buying it again in the future, and 82% of consumers willing to purchase plant-based dairy again. **Protein content, health, and nutrition** were some of the reasons consumers cited for purchasing plant-based meat and dairy again in the future.

Taste is the primary driver for the consumption of traditional meat. Here, plant-based meat has ways to go, as taste did not appear as the top driver for consumers to repurchase it. Some consumers who stopped purchasing the category also cited taste as the primary reason for not making repeat purchases. Plant-based dairy, on the other hand, scored well on taste but fell short in terms of versatility. Accessibility, which includes affordability and availability, is another critical barrier that needs to be addressed to encourage more trials and repeat purchases for both plant-based meat and dairy. Consumers also mentioned **lack of relevance, resistance from family members, and a perception of unnaturalness** as some of the other reasons for not trying plant-based meat and dairy.

Dual usage between plant-based and animal-derived products was common among consumers. 72% of users of plant-based meat also consumed animal-derived meat, and 90% of plant-based dairy users consumed animal-derived dairy, indicating that plant-based options are being added to the existing consumption of animal-derived meat and dairy rather than replacing them. Both plant-based meat and dairy are currently consumed in similar ways as conventional meat and dairy. However, while conventional animal products are consumed more regularly, plant-based options are **reserved for special occasions**. Of the households that tried plant-based meat, 40% of them also purchased plant-based dairy, indicating a **higher probability of trials for adjacent categories** among users of plant-based foods.

For plant-based meat and dairy products to attract more trials and become a staple in consumer households, building relevance and awareness, along with addressing taste, price, and convenience factors, can be key strategies. Initiatives like sampling that generate word-of-mouth awareness, along with leveraging social media and retail displays, can contribute to an increase in awareness and adoption.

INTRODUCTION

India's smart protein sector has truly taken off over the last couple of years, with new products going to market every few months. **There are 377 products across 41 formats, and 73 smart protein brands across meat, eggs, and dairy available in retail and on e-commerce channels.** Consumers are spoilt for choice with products that range from kebabs, nuggets, patties, sausages, and momos to keema, biryani, and curries in the plant-based meat category. Plant-based milk options range from almond, soya, and oat to millets, rice, and coconut, along with an array of alternatives to conventional cheese, butter, ice cream, yogurt, etc. These products are available to consumers in key urban areas through a variety of distribution channels, including direct-to-consumer (D2C) channels by the brands, the HoReCa industry, e-commerce platforms, and traditional brick-and-mortar stores.

Recognizing the burgeoning potential of this sector, The Good Food Institute India has partnered with Kantar World Panel to conduct a market study. This study aims to shed light on consumer awareness, trial, and purchase behavior within these categories. By uncovering valuable consumer behavior insights, our goal is to empower manufacturers and industry stakeholders with the knowledge required to advance and enrich the smart protein landscape in India.

Key research questions answered

1. What is the awareness, trial, and repeat purchase for the category?
2. What is the purchase and consumption behavior for plant-based meat and dairy products?
3. What are the drivers and barriers for trials, repeat purchases, or discontinued usage?

Research Methodology

- Quantitative survey
- Research partner: Kantar World Panel
- The research was conducted in 2 phases
- **Phase 1**
    - Listing exercise on the "household panel" of Kantar to understand awareness, trial and repeat purchase for plant-based meat, dairy,

and eggs
    - Total no of interviews conducted: 2535
- **Phase 2**
    - From the households listed during Phase 1, a sample of households that purchased plant-based meat and dairy products in the last six months were invited for a deep dive to understand their usage behavior.
    - No of interviews: Plant-based meat - 54, Plant-based dairy - 74

Profile of the respondents

- Households in the age group of 24–60
- NCCS A
- Monthly Household Income (MHI) of INR 50K and above
- Living in urban areas — metros (with a population of over 1 million) and non-metros
- A mix of vegetarians & non-vegetarians (flexitarians)

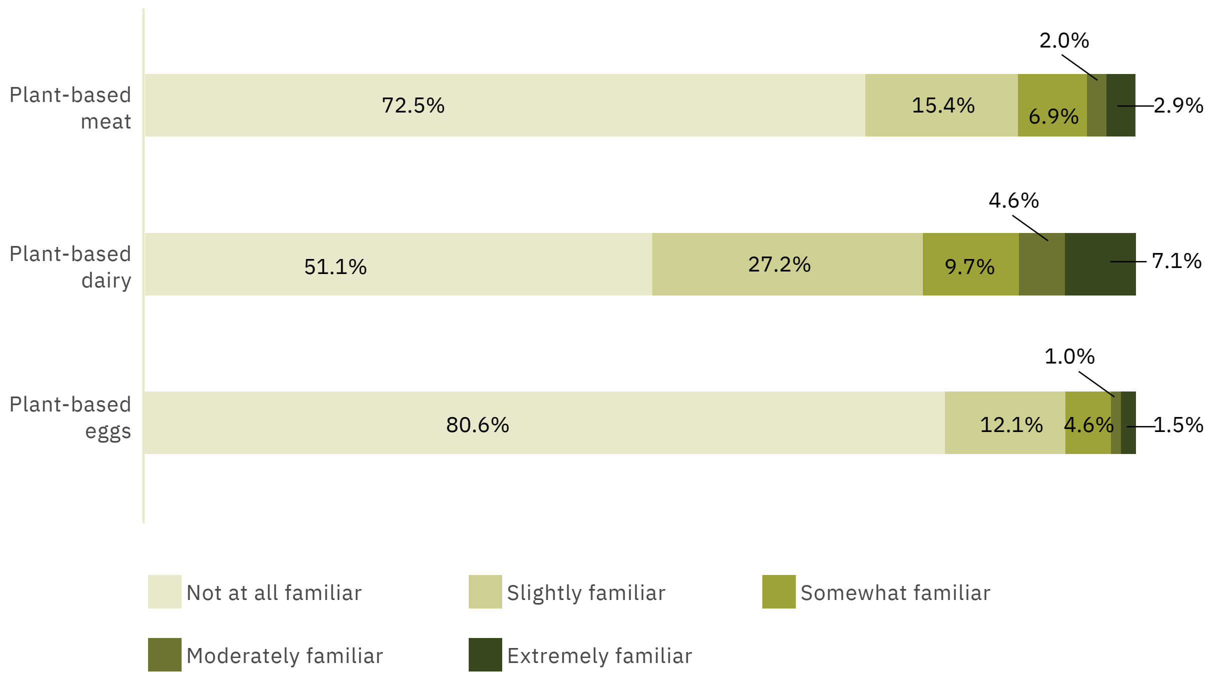
Key Findings:

1. Awareness levels for plant-based meat, dairy and eggs

1.1. CONSUMERS' FAMILIARITY WITH PLANT-BASED MEAT, DAIRY, AND EGGS

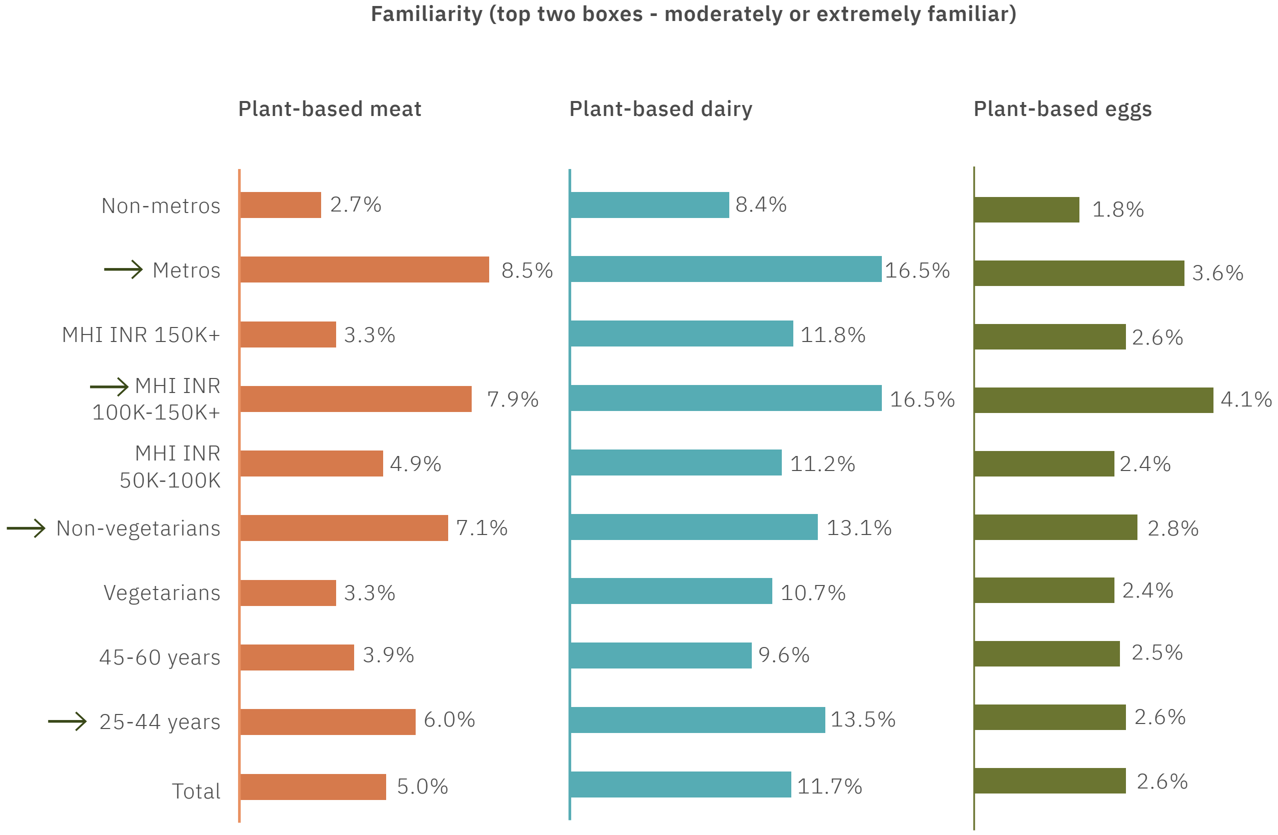
Among the three categories, plant-based dairy boasts the highest levels of awareness, followed by plant-based meat, with plant-based eggs trailing behind with the lowest levels of awareness.

- Close to 30% of the respondents were familiar with plant-based meat, and approximately 50% of the respondents were familiar with plant-based dairy. For plant-based eggs, the number stands at ~20%.
- In terms of strong familiarity, 5% of the respondents claim to be moderately or extremely familiar with plant-based meat, and 12% express the same level of familiarity with plant-based dairy. However, plant-based eggs lag behind, with only 3% reporting moderate or extreme familiarity.
- 22% of respondents are somewhat or slightly familiar with plant-based meat, and 37% with plant-based dairy.



1.2. AWARENESS LEVELS BY VARIOUS DEMOGRAPHICS

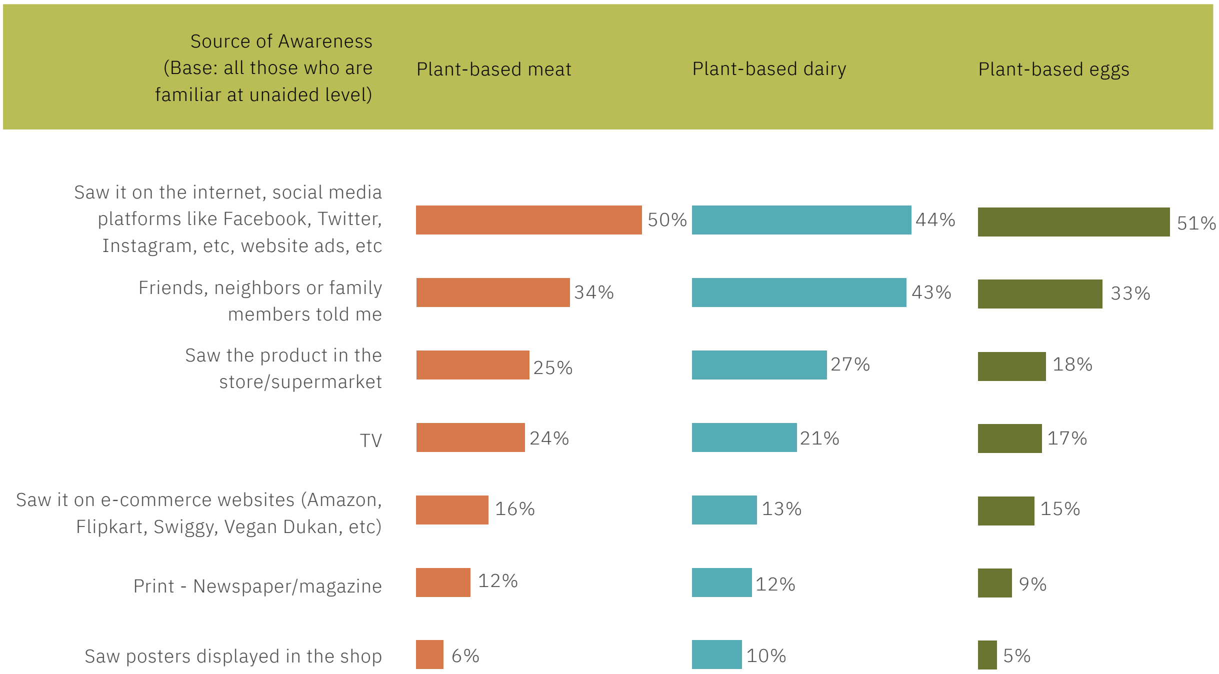
Relatively higher awareness levels were seen among younger age groups (25–44) with an MHI of INR 100K to 150K. Non-vegetarians living in metros have higher awareness levels compared to vegetarians and consumers in non-metro cities. Awareness levels in metros are almost double that of non-metros for plant-based dairy.



Top 2 boxes indicate the % of consumers who have rated their familiarity in the top 2 points (moderate/extreme) on the 5-point scale.

1.3. SOURCES OF AWARENESS

Internet, word of mouth, and in-store displays are the key sources of category awareness across meat, dairy, and eggs. E-commerce websites are also a key source of awareness of meat and dairy products for non-vegetarians living in metros.



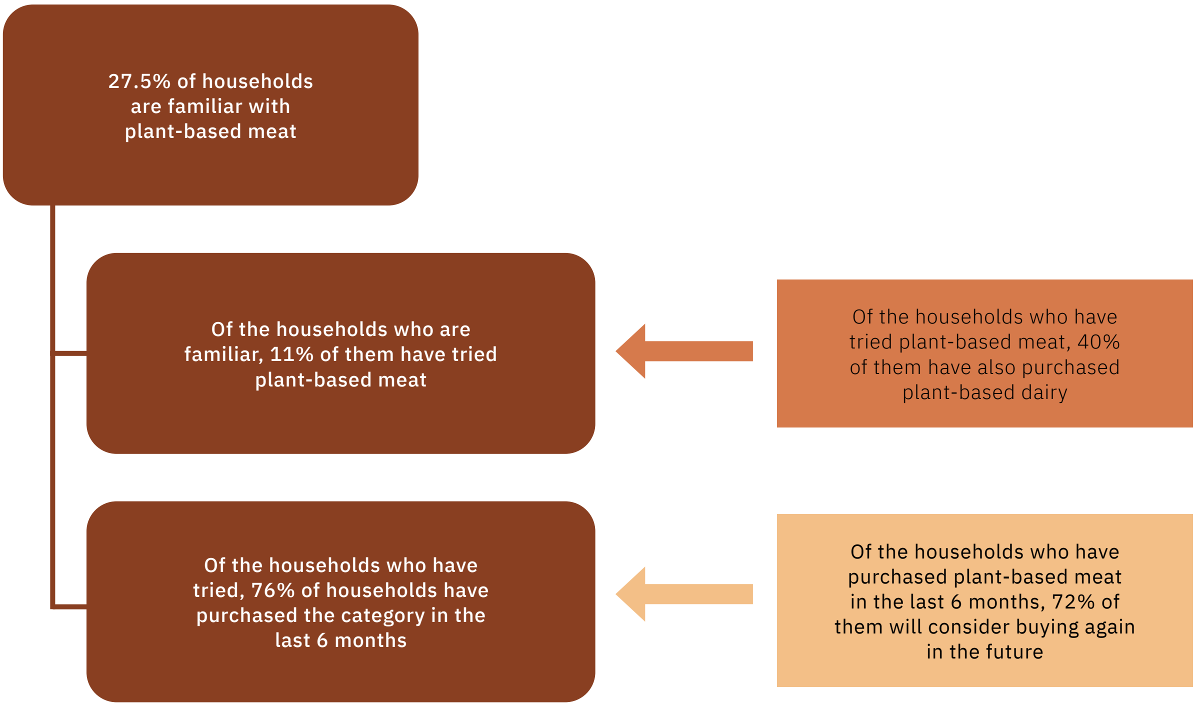
2. Buying Behavior

2.1. PLANT-BASED MEAT

2.1.1. Trial and repeat purchase intent

Of all the households interviewed, 27.5% were familiar with plant-based meat (slightly, somewhat, moderately, or extremely familiar). **Of the familiar households, 11% had tried plant-based meat.** 76% of the households who tried plant-based meat also purchased it in the last six months. **72% of the households who bought plant-based meat in the last six months said they would consider buying again, indicating a healthy repeat purchase intent.**

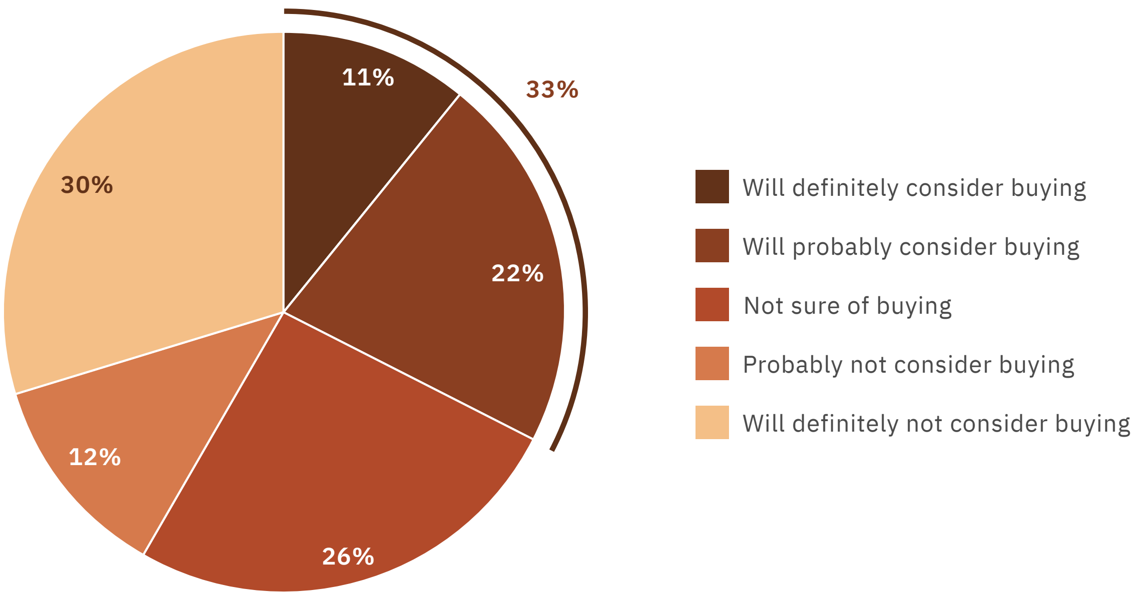
Of the households who tried plant-based meat, 40% also purchased plant-based dairy. This trend indicates that once the consumer tries one category among plant-based meat, dairy, and eggs, there is a high probability of trial for the other categories.



2.1.2. Purchase intent for the future

33% of households who were familiar with plant-based meat said they would probably/definitely consider buying products from the category in the future. Of all the demographics studied, we observed a higher future purchase intent among non-vegetarians and consumers from a higher-income group. 42% of non-vegetarians familiar with the category said they would probably/definitely consider buying the category in the future. 39% of the consumers in the income bracket of INR 100K to 150K said they would probably/definitely consider purchasing from the category in the future.

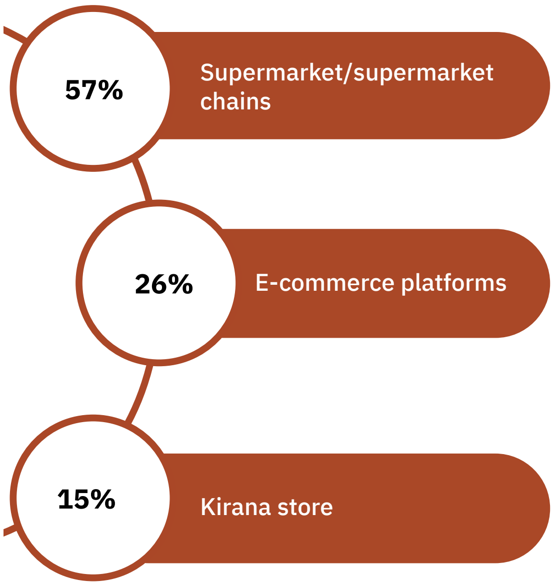
Plant-based meat



2.1.3. Purchase dynamics

Most households bought plant-based meat from supermarkets, followed by e-commerce platforms. Plant-based chicken *seekh kebabs*, chicken popcorn, chicken *samosas, biryani*, and burger patties were the most tried products among consumers. **72% of these consumers also purchased animal-derived meat products.**

Place of purchase

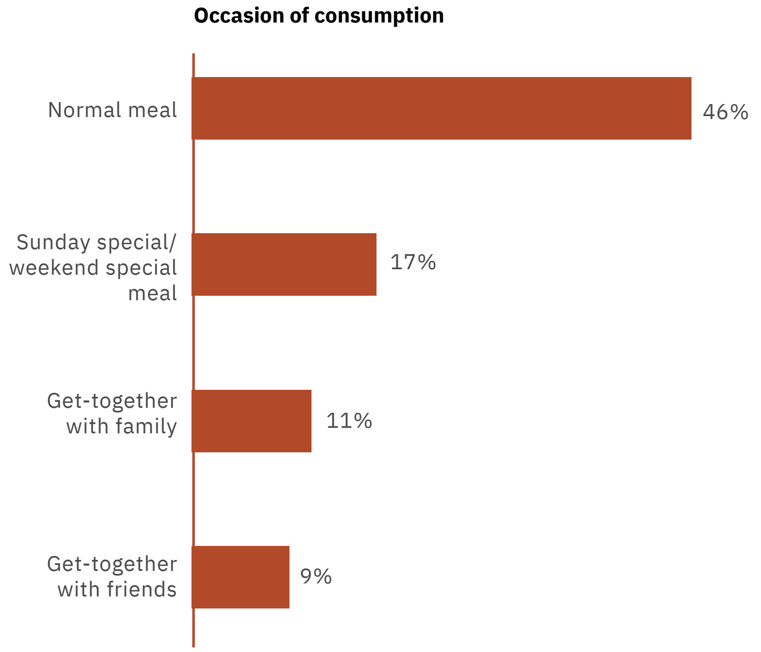


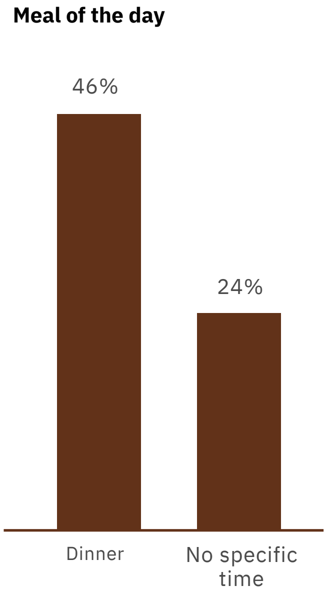
Types of products tried

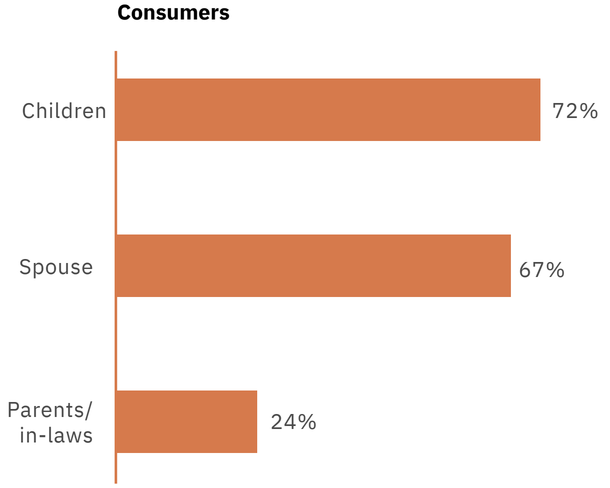
Product	% tried
Chicken seekh kababs	26%
Popcorn chicken	20%
Chicken samosas	17%
Chicken biryani	17%
Chicken burger patty	15%
Butter chicken	13%
Chicken rolls	11%
Chicken curry	9%
Chicken kebabs	9%

2.1.4. Consumption dynamics

Consumption dynamics for plant-based meat are similar to conventional meat. Plant-based meat is consumed as a regular meal, as a special weekend meal, or at gatherings with family and friends, where the entire group is partaking in the consumption. Most consumers consumed plant-based meat at home during weekends or at dinner.







76% of these buyers consumed plant-based meat during weekends

82% of these buyers consumed plant-based meat at home

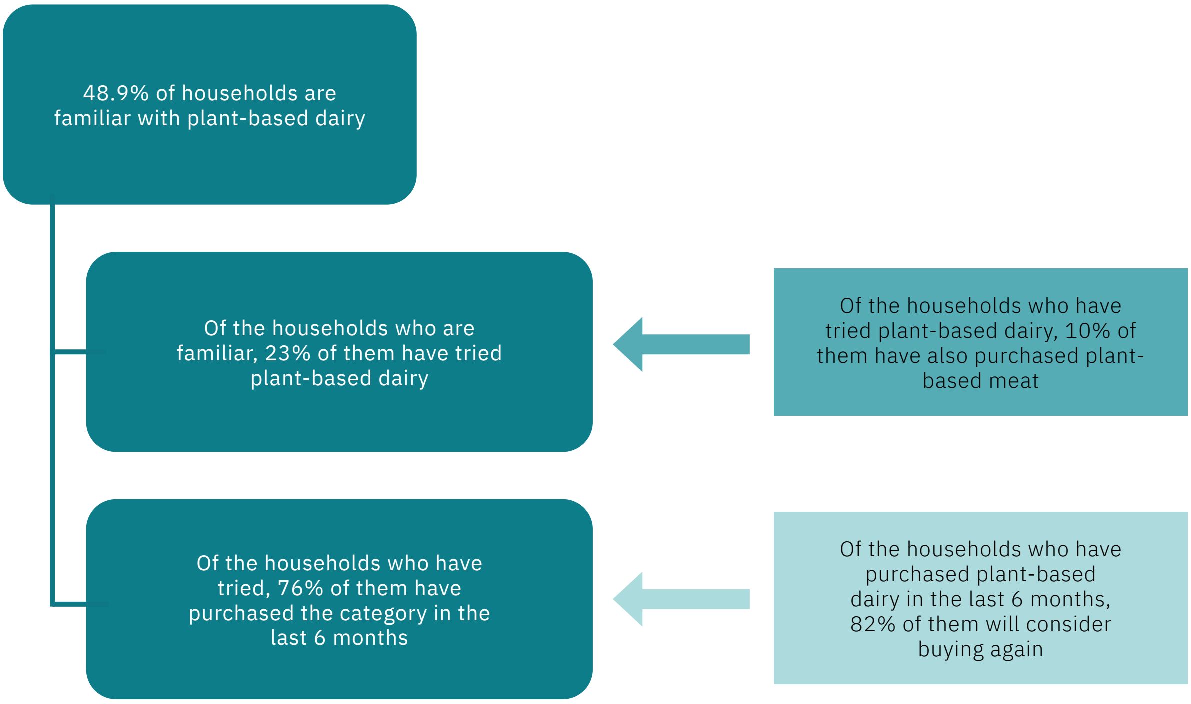
2.2. PLANT-BASED DAIRY

2.2.1. Trial and repeat purchase intent

Of all the households interviewed, 49% were familiar with plant-based dairy (slightly, somewhat, moderately, or extremely familiar). **Of the familiar households, 23% had tried plant-based dairy.**

82% of the households who purchased plant-based dairy products in the last six months said they would consider buying again, indicating a very high repeat purchase intent.

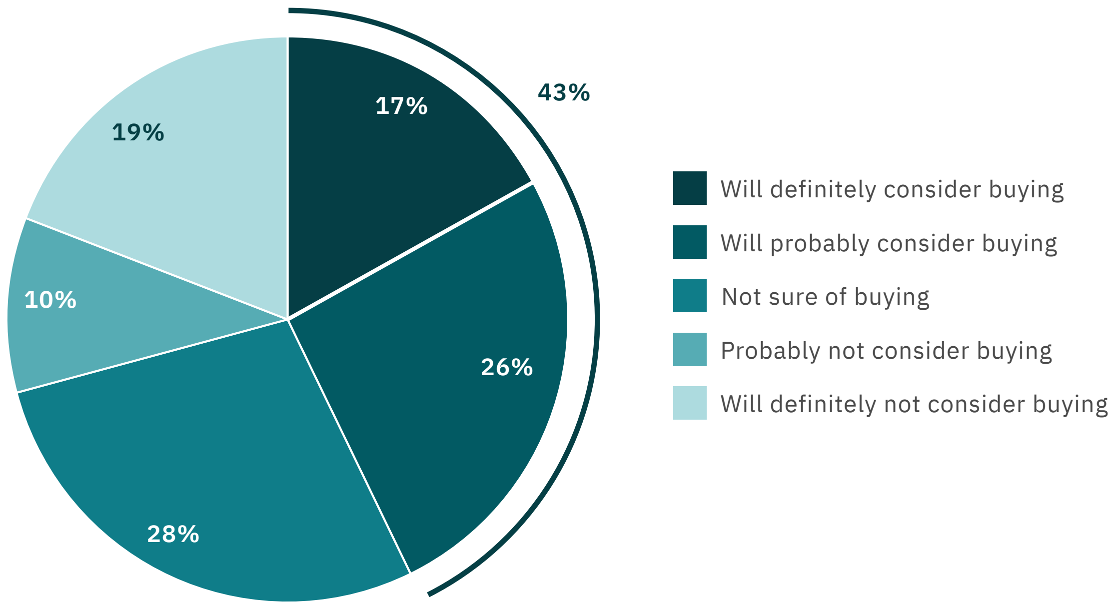
Of the households who tried plant-based dairy, 10% also purchased plant-based meat. Among the plant-based meat, dairy, and egg category, plant-based dairy is the strongest entry point into the consumer's household. Once consumers try plant-based dairy, they experiment with other products within the plant-based category.



2.2.2. Purchase intent for the future

43% of households familiar with plant-based dairy would probably/definitely consider buying from the category again. Higher-income groups (with an MHI of 100K+), non-vegetarians, and younger age groups (25–44) show a higher repeat purchase intent than others.

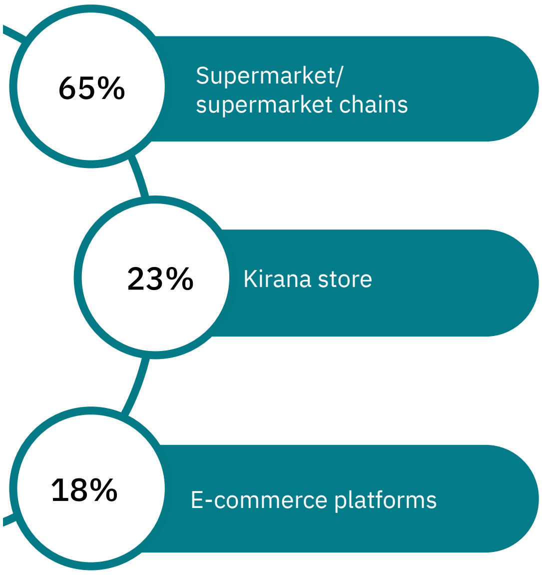
Plant-based dairy



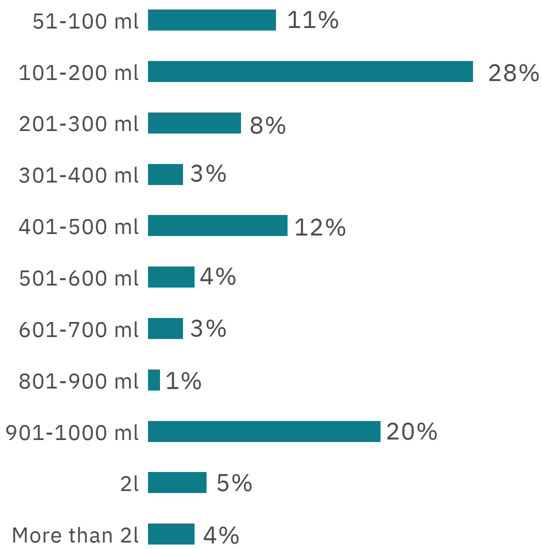
2.2.3. Purchase dynamics

Similar to plant-based meat, consumers bought plant-based dairy primarily from supermarkets. Kirana stores are the second largest channel for the sale of plant-based dairy followed by e-commerce platforms. The most common quantities of plant-based milk purchased are 100–200 ml and 900–1000 ml. Soy milk is the most widely consumed plant-based dairy product followed by almond and oat milk. **89% of the users of plant-based dairy have also purchased animal-derived dairy products.**

Place of purchase



Quantity purchased



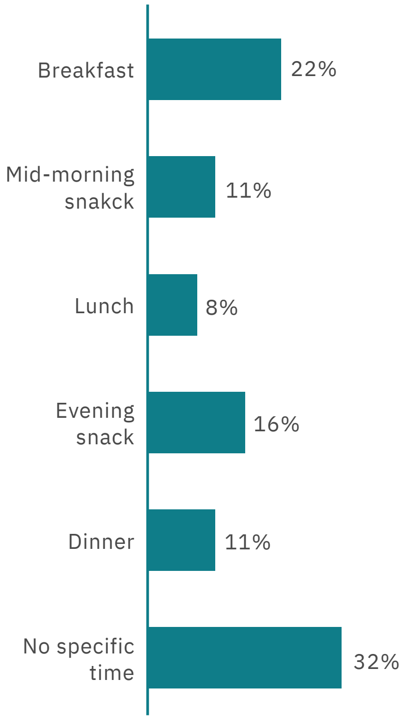
Types of products tried

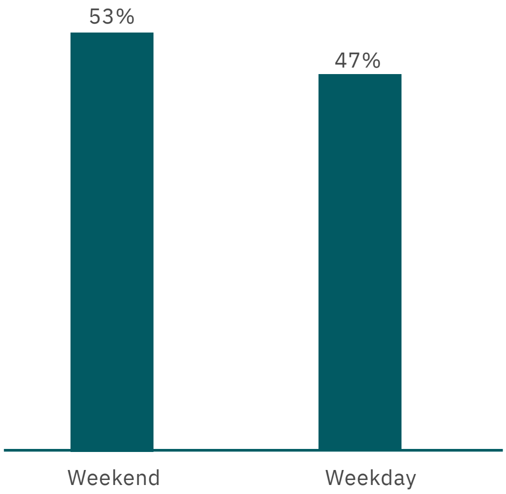
Product	% tried
Soy milk	80%
Almond milk	55%
Oat milk	39%
Rice milk	27%
Millet milk	30%
Cheese	54%
Plant-based paneer/tofu	39%

2.2.4. Consumption dynamics

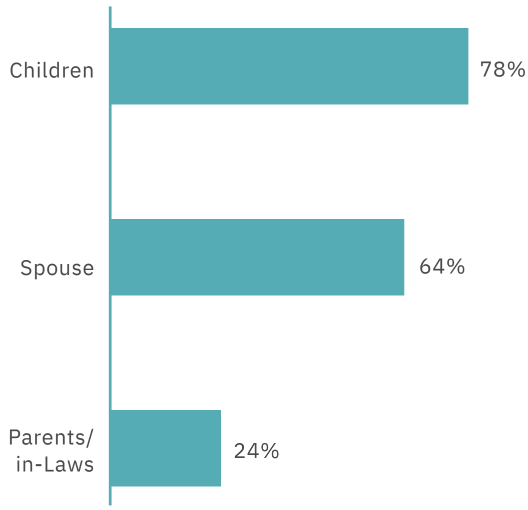
Plant-based dairy is mainly consumed with breakfast and as a mid-morning/ evening snack. 32% of the consumers felt that it can be consumed at any time of the day. Consumption is slightly higher over the weekends as consumers make plant-based dairy a part of special occasions rather than for regular daily consumption.

When is it consumed?





Consumers



85% of these buyers consumed plant-based dairy at home

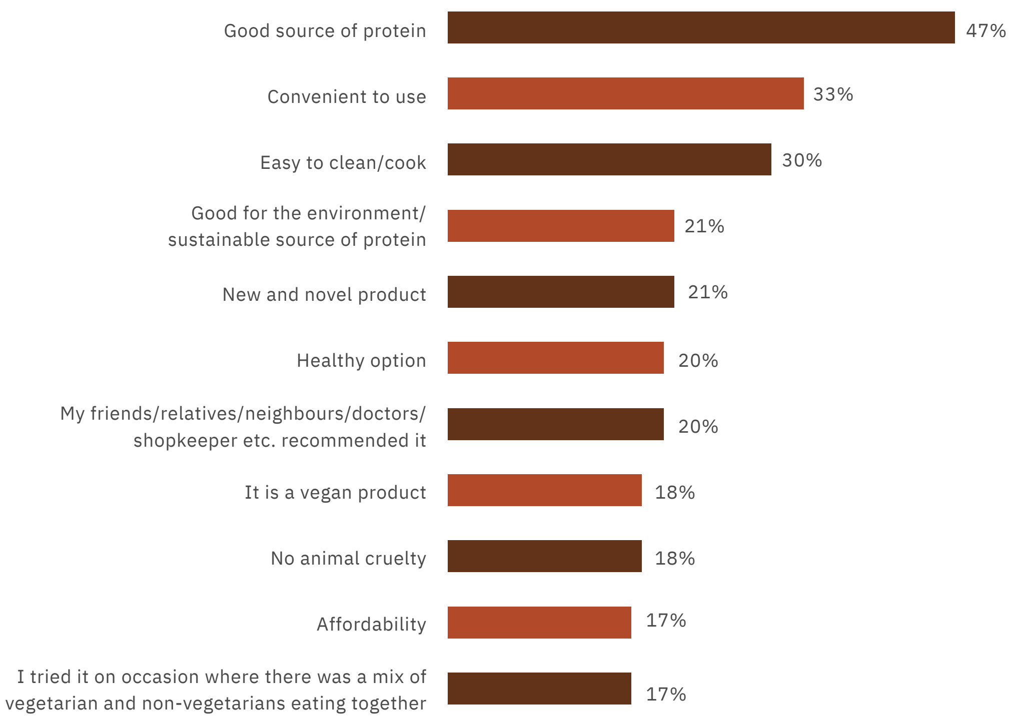
3. Drivers and barriers for trial, repeat purchase and discontinued usage

3.1. PLANT-BASED MEAT

3.1.1. Reasons for trying

Good protein content, convenience (to use and to clean/cook/prepare), association with **sustainability, novelty and newness, and health-related factors** are the key reasons consumers try plant-based meat. Word of mouth is also a key motivator for consumers to try plant-based meat.

Reasons for trying plant-based meat

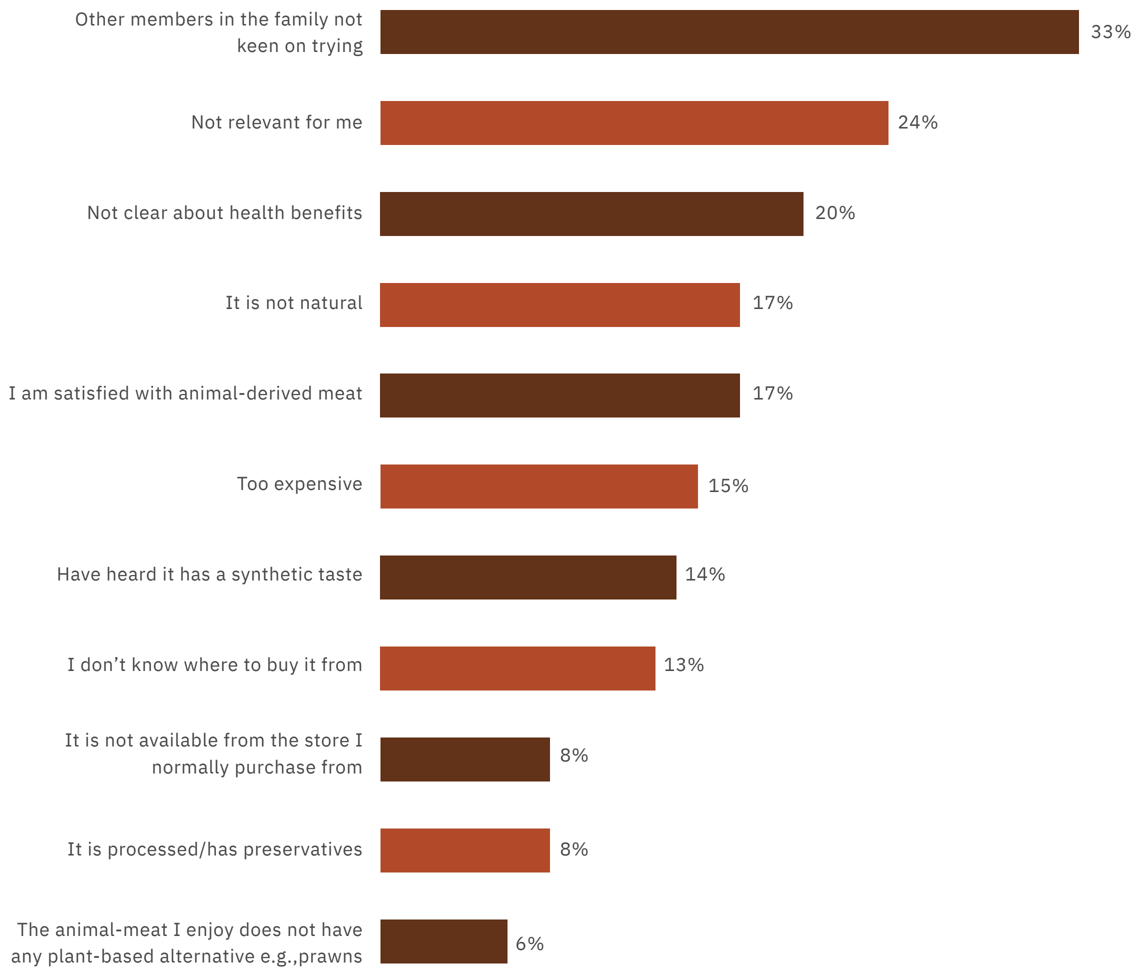


3.1.2. Barriers to trial

Resistance from family, lack of relevance or clarity on health benefits, and unnaturalness were top barriers to trying plant-based meat. More consumers in non-metros felt that "these products are not natural" and were "not sure where to buy these products from" compared to consumers in metros. A higher proportion of consumers aged 45+ felt that "these products are not relevant for them" or "have a synthetic taste and preservatives" compared to the younger audience.

A relatively higher percentage of the audience in the MHI group of INR 50K-100K felt that "plant-based meat is not relevant for them" and "it is too expensive" compared to the respondents in the higher income groups (MHI of INR 100K+). **Building relevance for the category through communication can improve trials.**

Barriers to trying plant-based meat

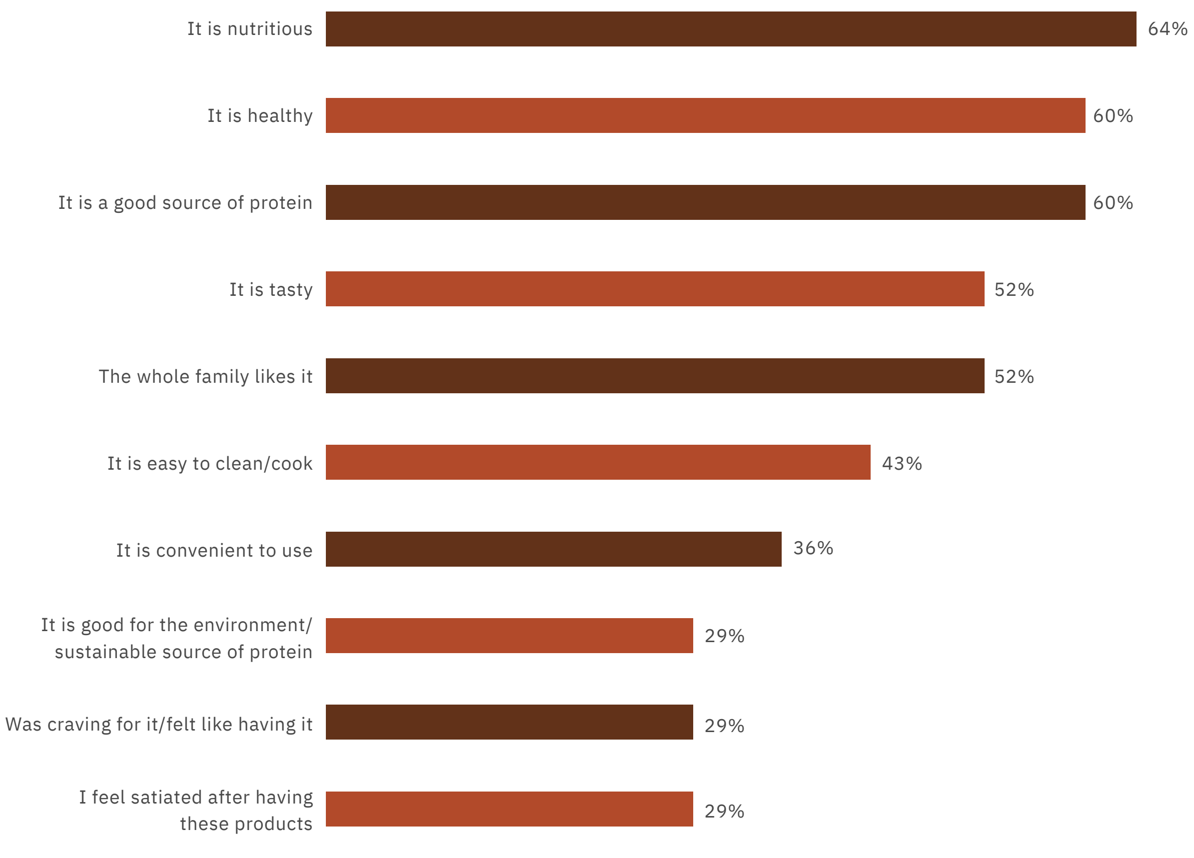


3.1.3. Reasons for repeat purchase/discontinuing the usage of the category

Of the households who purchased plant-based meat in the last six months, 72% said they would consider buying again. **Nutrition, health, and protein content are the key reasons users mention for repeat purchases of plant-based meat.** Taste, the top driver for conventional meat, appears after health and nutrition as a reason for purchasing plant-based meat, indicating improvement required on the taste front.

Key reasons cited for not continuing to use plant-based meat after trying were **"did not like the taste"** and **"too expensive."** In terms of taste, consumers also mentioned not liking the product's texture and the product not being juicy enough, having artificial flavors, added preservatives, etc.

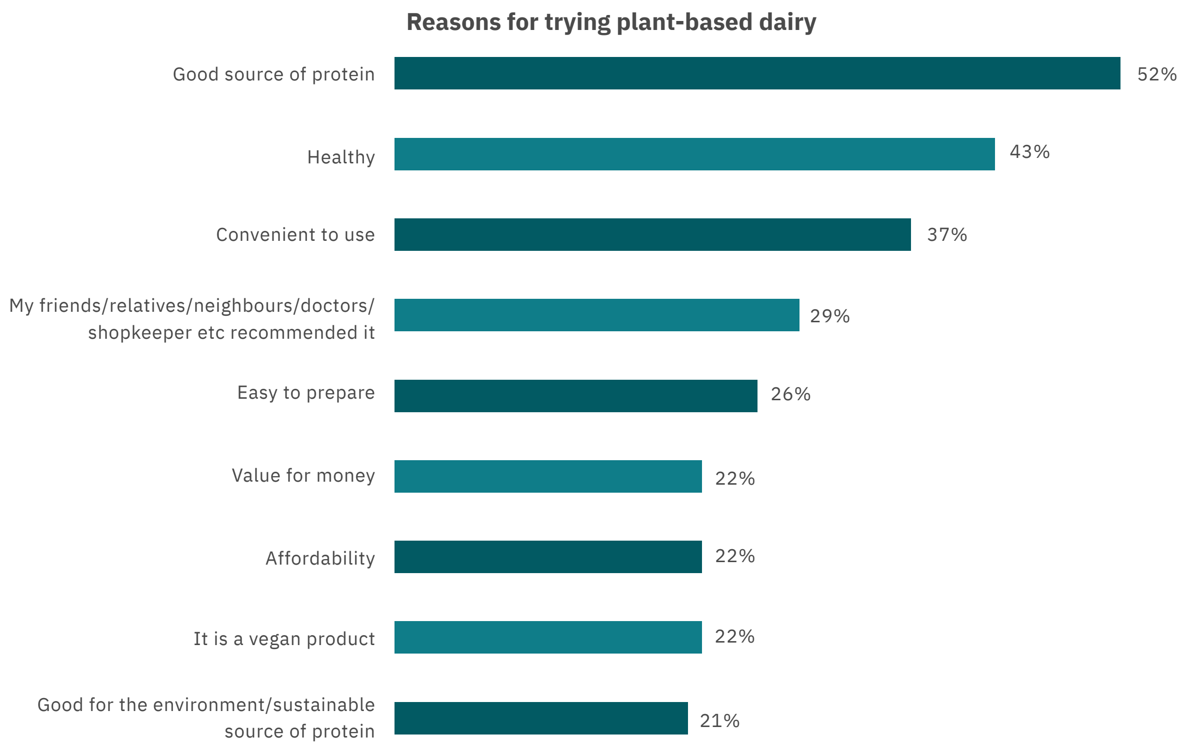
Reasons for repeat purchase



3.2. PLANT-BASED DAIRY

3.2.1. Reasons for trying

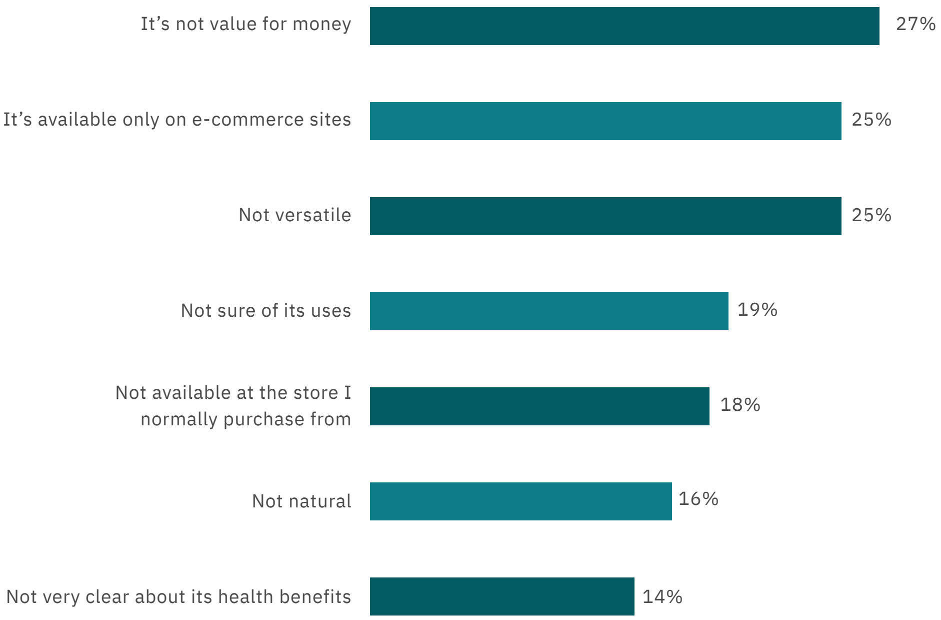
High protein content, health-related factors, convenience, and word of mouth were key reasons consumers cited for trying plant-based dairy. Metros currently show a higher acceptance of plant-based dairy products than non-metro cities.



3.2.2. Barriers to trials

Accessibility and versatility are the key reasons for consumers not trying plant-based dairy. Lack of affordability and availability (as the products are often only available on e-commerce platforms) act as deterrents to trying the category. Low value for money was a more pronounced barrier among consumers in non-metros, lower-income groups (MHI of INR 50K-100), and vegetarians. Respondents in metros and vegetarians rate the products low on versatility compared to the respondents in non-metros and non-vegetarians.

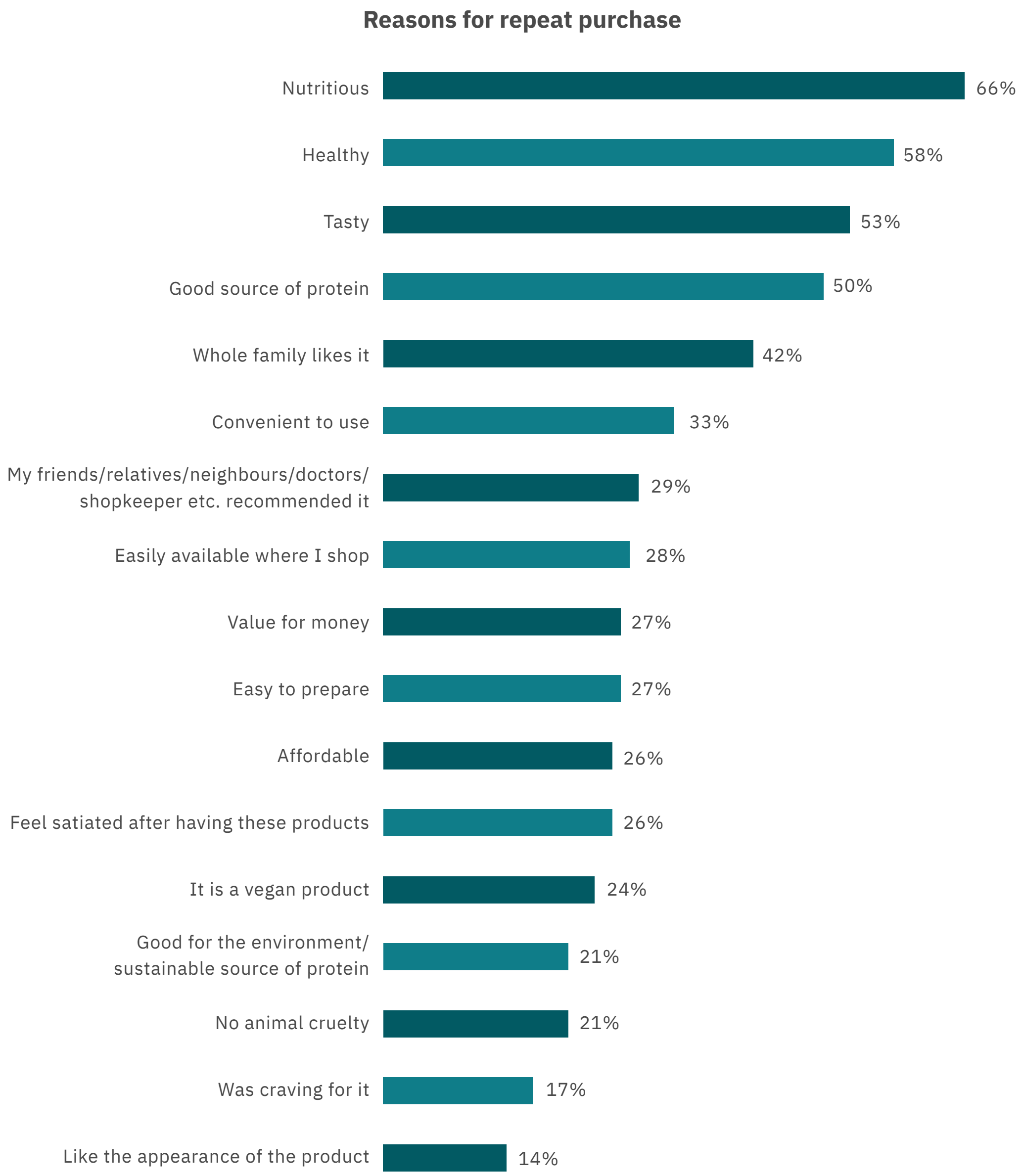
Barriers for trying plant-based dairy



3.2.3. Reasons for repeat purchase/discontinuing the usage of the category

Of the households who purchased plant-based dairy products in the last six months, 82% said they would consider buying again in the future. **Nutrition, health, taste, and protein content are the key reasons mentioned by the users for repeat purchases of plant-based dairy.** Repeat purchasers are mostly the respondents in metros.

Key reasons cited for not continuing to use plant-based dairy after trying are **"did not like the taste"** and **"not convenient and natural."** Consumers also mentioned **"milk not being compatible with coffee/tea"** and **"product only being available on e-commerce sites"**



CONCLUSION

Limited or lack of awareness of plant-based meat and dairy, even among the early adopters leads to fewer trials of the category. However, among those who have tried plant-based meat or dairy, a majority are willing to buy them again. Dual usage between plant-based and animal-derived products indicates that plant-based options are being added to the existing consumption of animal-derived meat and dairy and not replacing them. Consumers are using plant-based meat and dairy for special occasions and specifically for their high protein content, health-related factors, and nutritional benefits. To attract more trials and become a staple in consumer households, the category of plant-based meat and dairy needs to work on building relevance and awareness, along with addressing taste, price, and convenience.

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The Good Food Institute (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 With unique insight across the scientific, policy, industry, and investment landscapes, GFI India is using the power of food innovation and markets to accelerate the transition of the world's food system toward smart proteins.