

# The Packaged Food Opportunity

Unlocking the Category

# An apparent dichotomy

- The explosion of interest in food v/s the relatively limited growth of the category

# A sense revolution that hasn't quite been tapped into

- Consuming the world through the senses
- New tastes, textures, flavours, occasions
- Eating out as a hobby/career
- Not quite translated into brand/category growth

# Why?

- Part of natural process of change, a gradual organic process
- Cultural variables- the focus on freshness, the evaluation of value
- Complexity of the market- the peculiar combination of the global and the extremely local
- Pre-fabricated solutions- categories originating elsewhere, getting disproportionate investment
- Limited consumer knowledge coming from a narrow orientation?

# Many changes, many opportunities

- A host of changes in preferences
- Not a simple from/to transition, but various hybrid needs emerging
- Need to develop products/strategies in response to the market
- Need to decode preferences, and understand underlying principles

# Food as culture

- Food is a deeply cultural category with many embedded meanings
- Need to understand what drives the category with nuance and depth
- Need to build a rich vocabulary capable of describing consumer needs in a way that is useful

# Different cultures see food differently

- The Masterchef example

- Intrinsic appeal of food as food v/s as decorated object

- Sequential v/s simultaneous

- Separation of senses v/s combination of senses

- Taste as sign of health v/s taste as enemy of health

- Cultural health v/s scientific health

- Food as outpouring of person v/s food as food as technical skill

# New Stirrings

- The desire for new experiences: New as extension/hybrid form of old
- Adoption of negative labour saving practices- the time-poor/desire-rich consumer
- Pan-Indian cuisines, including some international foods as well- structural similarities with Indian notion of food
- Excitement on the periphery

# New Stirrings...

- The need to engage the sense at all times
- The need to make occasions out of everyday life
- The need for variety
- Food as performance that is staged
- The new and very distinctive consciousness about health
- Adoption of elements rather than recipes

# Many possibilities

- Make anything tasty
- Make anything snacky
- Make anything a mobile food
- Make anything a finger food
- Make anything healthier
- Make the old feel new
- Make the new seem familiar

# Harness culture

- Make culture an enabler, rather than barrier
- Surround category/brand in appropriate meaning

# Examples

- CDM
- Aashirvaad Atta
- Kinley
- Saffola
- Maggi

# Maggi

- Strongly linked to the Indian way of preparing food
- Maggi masala
- Codes of abundance and joy
- Introducing the element of time in the traditional process of creating food

# Maggi: Structurally Indian

- Mimics the simplest Indian meal items: poha, upma, daliya
  - A base ingredient that is made tasty with masalas and vegetables
- A form that lends itself to the Indian sensibility of food
  - Yet in a manner that is attractive enough to children

# Replaying the intrinsic food codes

- Abundance
- Never running out of food
- Hunger as a sign of health
- Self satisfaction from feeding a lot of hungry mouths



# Slipping in easily into the existing structure

- By respecting its well defined codes, but compressing the process of food creation
- Indianising the idea of outside food, rather than trying to westernise the home / mother
- And a form that is sufficiently novel to be attractive

# Need to think of food as an opportunity in a holistic way

- Step outside self-inflicted labels
- Opportunity downwards, not capability upwards
  - Nescafe & out-of home coffee consumption
  - Marketing soup
  - Creating a breakfast portfolio
  - The beverage flavour trap

# Learn from the consumer

- The kitchen is the biggest playground for innovation
- The street the biggest laboratory
  - Macaroni Indian style
  - Maggi parlours
  - Eggs served in 50 ways
  - Whisky/Rum flavoured soda



# Packaged food: Principles governing change

- Align with tradition not challenge it
- There is an implicit hierarchy among codes, align with the higher order to introduce flexibility in others
- Change is good when it enables more not less
- Creating newness without becoming unfamiliar
- Locating the familiar in a new context
- Enable the woman to '*perform*' on the food stage

# Most intense experience we can have

- In India today, more true than ever before
- A whole range of meanings attached to food
- Brands skimming the surface

- Dive!