

THE STATE OF **PROTEIN & FIBRE** IN URBAN INDIA

AWARENESS | CONSUMPTION | BARRIERS

A study in collaboration with Euromonitor International
& Indian Institute of Millet Research (IIMR)



भारत-भारतीय श्री अन्न अनुसंधान संस्थान
श्री अन्न वैश्विक उत्कृष्टता केंद्र
ICAR-Indian Institute of Millets Research
Global Centre of Excellence on Millets (Shree Anna)





A Message from

DR. ANKITA MARWAHA

Director R&D LifeScience & India R&D Site Lead,
PepsiCo India

As consumers take greater ownership of their health and wellbeing, the role of nutrition is evolving from information to influence. The real opportunity lies in turning scientific insight into everyday actions that deliver meaningful health outcomes.

At PepsiCo, we believe in empowering people with our brands to make mindful choices, bring smiles to their lives, and positively impact the world. This reflects in our vision of pep+ (PepsiCo Positive) and our commitment to create positive choices. We aim to provide consumers with nutritious, great tasting food and beverage options that are convenient and fit their lifestyle needs.

Over the years, we have worked across age groups and communities to advance nutrition awareness and education. Through initiatives ranging from our support to Eat Right India initiative to community programs such as Quaker Bowl of Growth, we have seen firsthand that consumers are looking for knowledge they can trust and apply. This belief inspired our collaboration with Euromonitor International & Indian Council of

Agricultural Research- Indian Institute of Millet Research to better understand how Indian consumers perceive and engage with two nutrients that are increasingly central to nutrition conversations today: protein and fibre.

The findings reveal a compelling opportunity. Consumers are engaged, motivated, and eager to make informed choices, yet important gaps remain between awareness, understanding, and action. Bridging these gaps represents a significant opportunity for nutrition science, public health, and the food industry to work together to advance better nutrition outcomes.

We hope this report sparks meaningful dialogue, inspires collective action, and keeps consumers at the heart of better nutrition.



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Awareness, Consumption, Barriers

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DR. J. STANLEY

Director/CEO Nutrihub, Indian Council of Agricultural Research – Indian Institute of Millet Research

We are pleased to collaborate with PepsiCo India on this important initiative to understand awareness, consumption and barriers to protein and dietary fibre among urban consumers in India. At Nutrihub, ICAR-Indian Institute of Millets Research (ICAR-IIMR), we believe such partnerships play a vital role in advancing nutrition security through science, consumer insights, innovation, and evidencebased action.

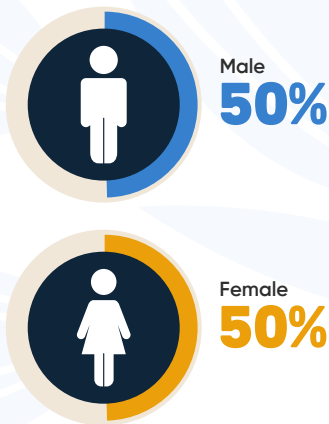
In India, where cereals remain a major source of daily energy and protein, understanding consumer awareness and consumption of protein, dietary fibre, and other key nutrients is increasingly important. This study provides valuable insights into urban consumers, whose evolving lifestyles and food choices shape nutrition behaviours and preferences.

The findings can help strengthen nutrition communication, encourage informed dietary choices, and bridge the gap between nutrition knowledge and practice. We hope this initiative will contribute to meaningful dialogue around protein and dietary fibre and support healthier dietary patterns. At Nutrihub, we remain committed to fostering collaborations that combine science, evidence, consumer understanding, and effective communication to improve nutrition outcomes

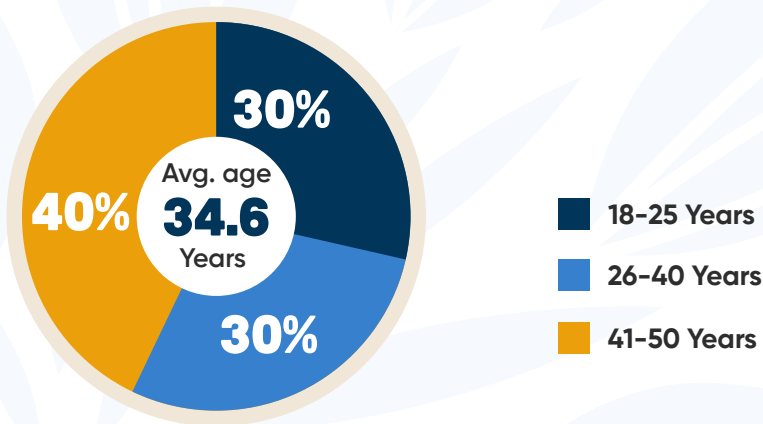


CONSUMER PROFILE AND GEOGRAPHIC COVERAGE

GENDER



AGE



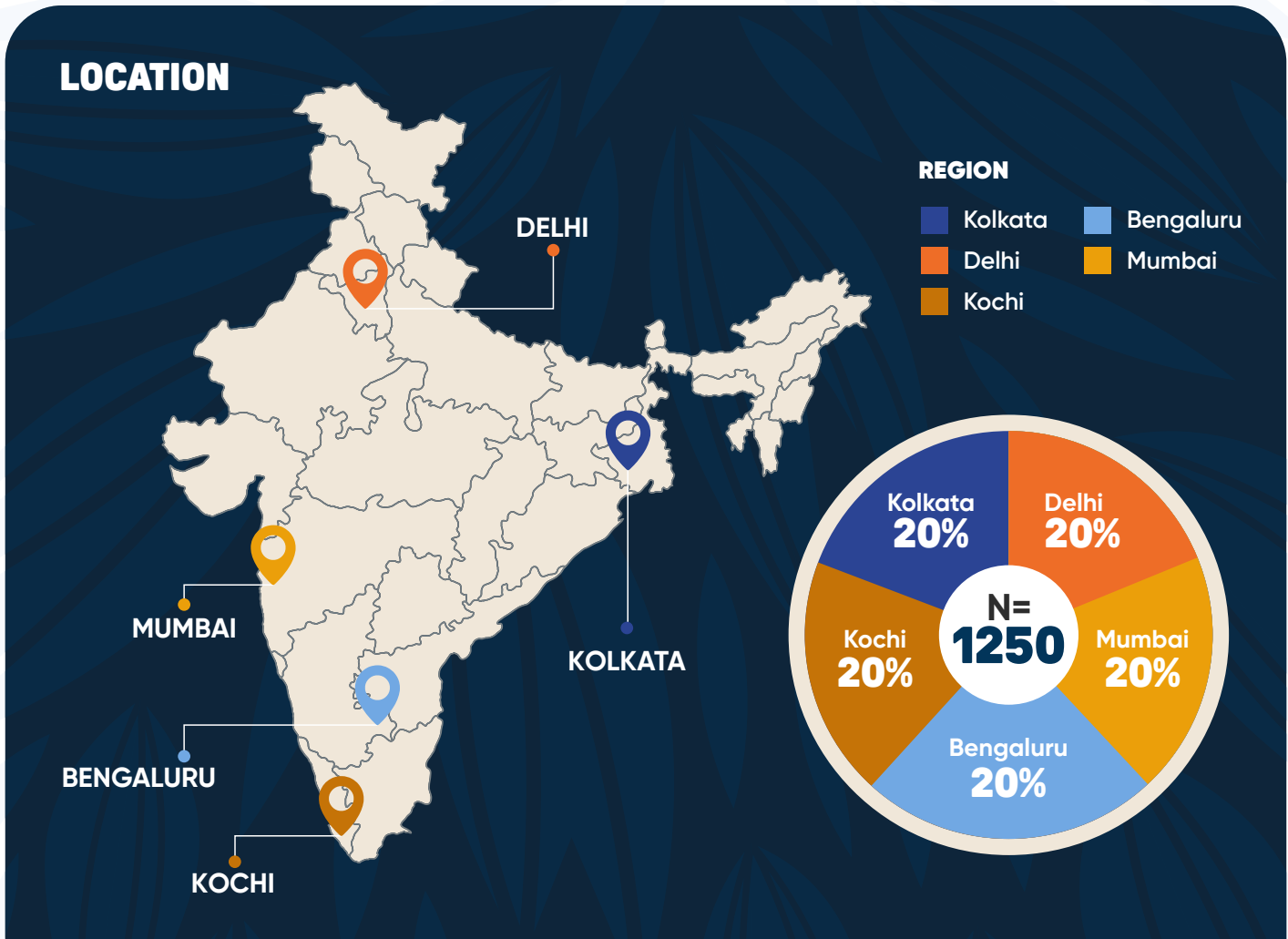
SOCIO-ECONOMIC CLASSIFICATION

N=1250

SEC Definition is as per NCCS



LOCATION



DID YOU KNOW?

Healthy Indian Adults need **0.83g protein** per kg body weight per day*



54g/day*
For Adult Men



46g/day*
For Adult Women

WHY PROTEIN MATTERS EVERYDAY



Building blocks for cells, enzymes, and hormones



Supports growth, immunity and metabolic health

PROTEIN FACT

43% OF YOUR BODY'S PROTEIN IS IN THE FORM OF **MUSCLES**[^]



Source:

* ICMR–National Institute of Nutrition, Dietary Guidelines for Indians, 2024; Nutrient Requirements for Indians – RDA & EAR (updated 2024).

[^] M. B., Kalouta, K., Vetri, V., & Foderà, V. (2022). Protein materials as sustainable non- and minimally invasive strategies for biomedical applications. *Journal of Controlled Release*, 344, 12–25. <https://doi.org/10.1016/j.jconrel.2022.02.016> | <https://www.sciencedirect.com/topics/medicine-and-dentistry/muscle-metabolism>

PROTEIN

AWARENESS | CONSUMPTION | BARRIERS



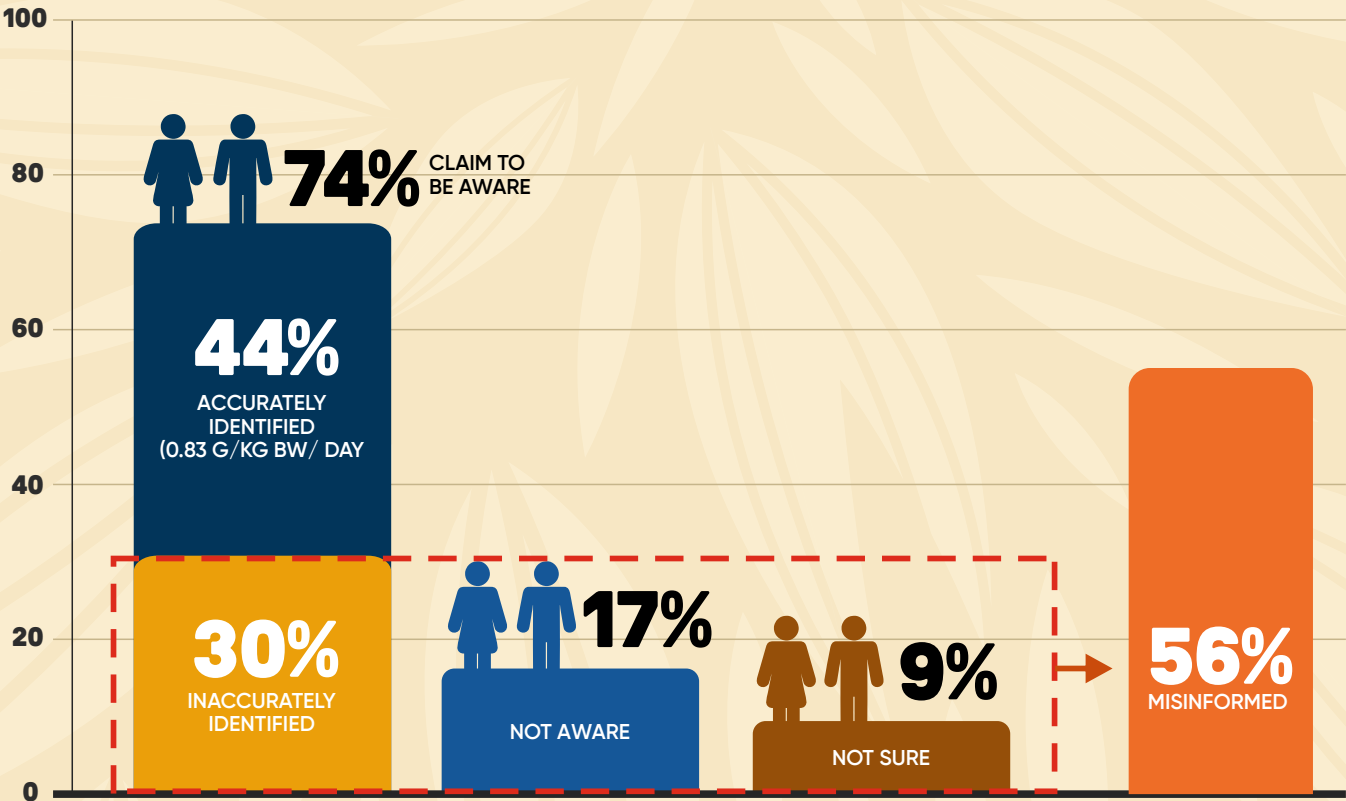
AWARENESS OF DAILY PROTEIN INTAKE



~74% OF CONSUMERS CLAIM TO BE AWARE OF DAILY PROTEIN REQUIREMENTS, YET, **56%** WERE MISINFORMED*

*not aware, not sure, or inaccurately identified the daily intake requirements

AWARENESS OF DAILY PROTEIN INTAKE REQUIREMENTS



CITY-WISE AWARENESS

● CLAIM TO BE AWARE

● MISINFORMED*



MUMBAI



70% CLAIM TO BE AWARE
58% MISINFORMED*



DELHI



78% CLAIM TO BE AWARE
63% MISINFORMED*



BENGALURU



82% CLAIM TO BE AWARE
48% MISINFORMED*



KOLKATA



71% CLAIM TO BE AWARE
59% MISINFORMED*



KOCHI



70% CLAIM TO BE AWARE
53% MISINFORMED*

*Misinformed (not aware, not sure, or inaccurately identified the daily intake requirements)

DELHI
CONSUMERS ARE MOST
MISINFORMED ABOUT
DAILY PROTEIN INTAKE
REQUIREMENTS, FOLLOWED BY
KOLKATA AND **MUMBAI**



PROTEIN CONSUMPTION IN URBAN INDIANS



70%

OF RESPONDENTS
CONSUME LESS THAN
41 g OF PROTEIN, WELL
BELOW RECOMMENDED
INTAKE LEVELS.

CONSUMPTION BY CITY

Below recommended daily intake levels



MUMBAI

69%



DELHI

71%



BENGALURU

68%



KOLKATA

67%



KOCHI

73%



PROTEIN INTAKE GAP
IS OBSERVED ACROSS
ALL FIVE CITIES, IT
BEING HIGHEST IN

KOCHI

FOLLOWED BY

DELHI & MUMBAI



BARRIERS URBAN INDIANS FACE TO CONSUME ENOUGH PROTEIN

Affordability and access to convenient protein-focused food options emerge as key constraints to protein consumption



HIGH COST

60%



LACK OF CONVENIENT CREDIBLE PROTEIN FOCUSED FOOD OPTIONS

57%

CITY WISE BARRIER TO PROTEIN CONSUMPTION



MUMBAI



DELHI



BENGALURU



KOLKATA



KOCHI



PROTEIN

CONSUMPTION FACES
DUAL CHALLENGE
ACROSS CITIES



A Message from

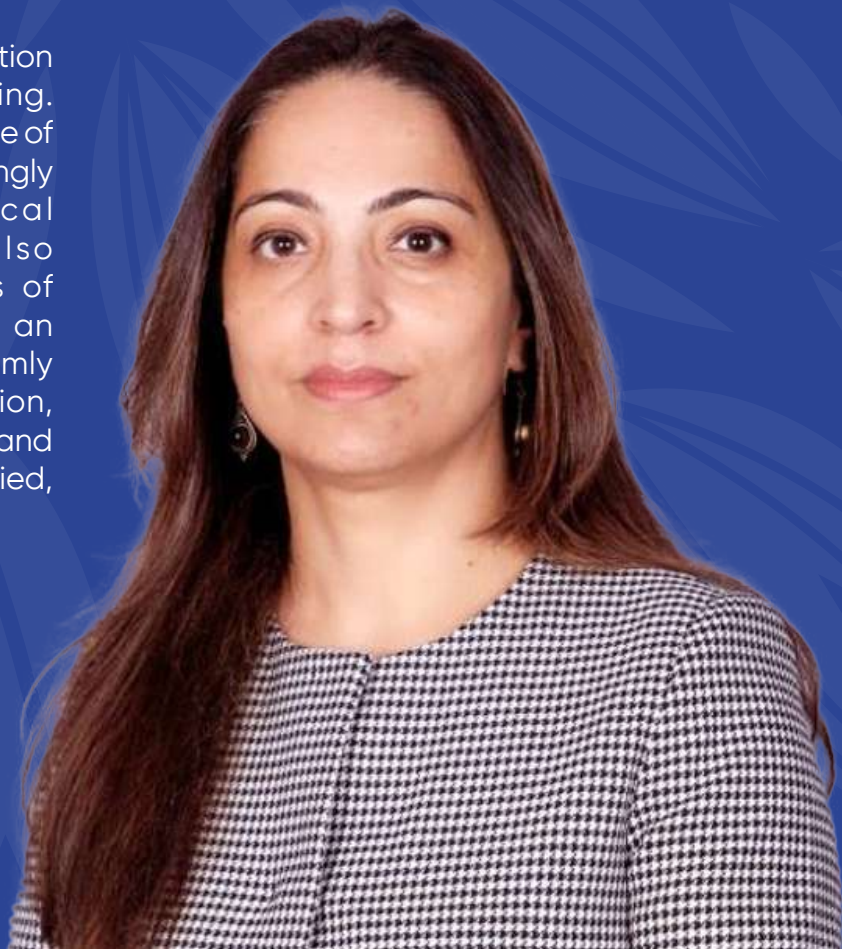
RITIKA SAMADDAR

RD, Regional Head- Dietetics,
Max Healthcare, New Delhi

India's nutrition landscape is at a pivotal inflection point, shaped by rising health awareness, evolving lifestyles, changing dietary patterns, and the growing burden of metabolic and lifestyle-related diseases. Nutrition is increasingly recognized as a cornerstone of preventive healthcare, disease management, recovery, and healthy ageing, underscoring the need for evidence-based and personalized nutrition as an integral part of modern healthcare. Yet awareness does not always translate into nutritional adequacy. Protein has become increasingly prominent in the nutrition conversation among urban consumers, but gaps remain in understanding individual requirements and how these can be met through familiar, everyday foods.

The findings point to an important distinction between awareness and understanding. While consumers recognize the importance of protein, it is often associated more strongly with athletes, fitness, and physical performance. Supplements are also perceived by many as a key means of meeting protein needs. This presents an opportunity to place protein more firmly within the context of everyday nutrition, recognizing its importance across diets and lifestyles, while emphasising the role of varied, protein-rich foods in regular meals.

The focus, therefore, is not simply on building awareness, but on enabling consumers to translate that awareness into practical dietary choices. Making protein-rich foods accessible, convenient, affordable, and relevant to familiar eating patterns can support more consistent intake as part of a balanced diet. Alongside protein, dietary fibre is emerging as another important area of nutrition awareness. Understanding how consumers perceive and incorporate fibre into their everyday diets can further support overall dietary quality and healthier eating patterns.



PROTEIN NEEDS TO BECOME EASIER AND MORE FAMILIAR

NEEDS ACROSS GENERATIONS

I WISH ADDING PROTEIN TO MY DIET FELT EASIER & MORE NATURAL



GEN Z
90%



MILLENNIALS
88%



GEN X
90%

I WISH PROTEIN WERE AVAILABLE IN MORE FAMILIAR & EVERYDAY FORMATS



GEN Z
89%



MILLENNIALS
89%



GEN X
89%

DID YOU KNOW?

Healthy Indian Adults need



30 g/day*
For Adult Men



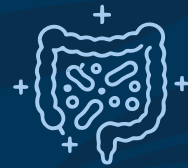
25 g/day*
For Adult Women

WHY FIBRE MATTERS EVERYDAY

Fibre provides multiple health benefits



Digestive Health



Gut Microbiome



Heart Health



Metabolic health



FIBRE FACT

FIBRE IS MUCH
MORE THAN JUST
**DIGESTIVE
HEALTH**

*Source:

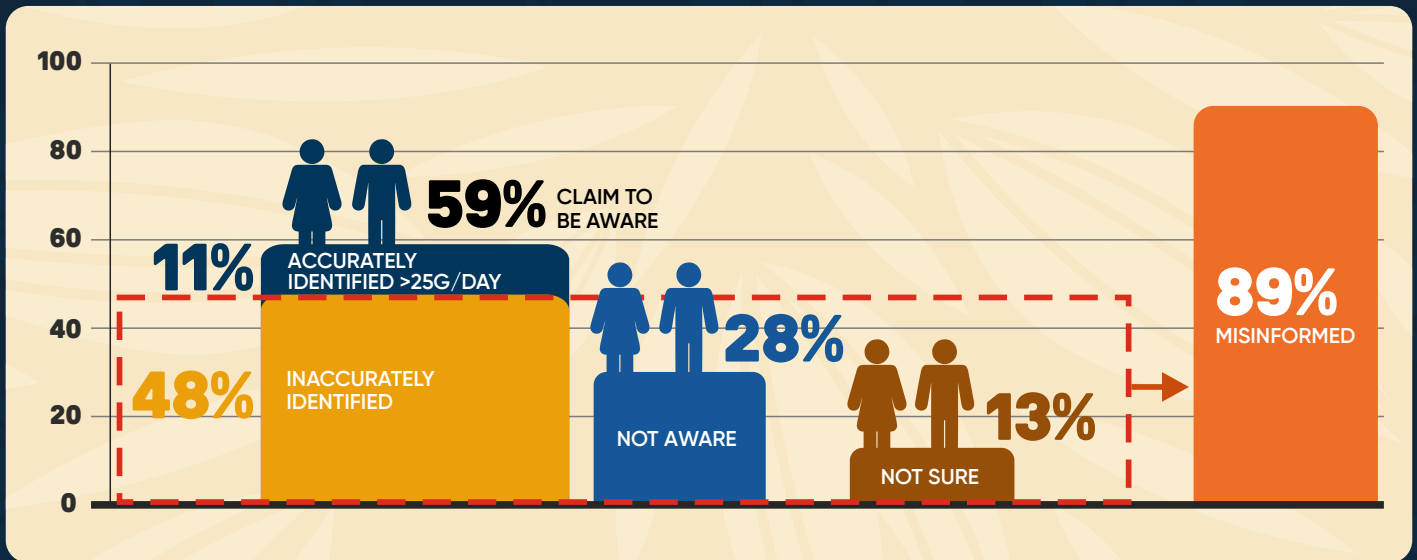
ICMR–National Institute of Nutrition, Dietary Guidelines for Indians, 2024; Nutrient Requirements for Indians – RDA & EAR (updated 2024).

FIBRE

AWARENESS | CONSUMPTION | BARRIERS



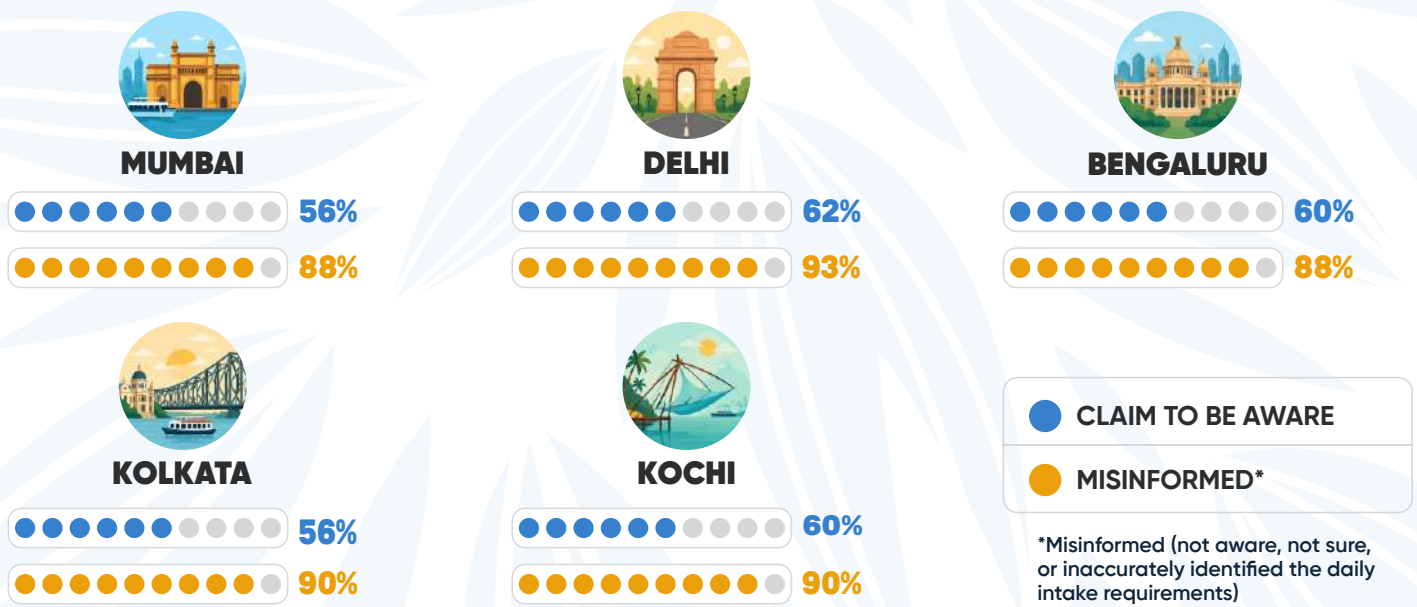
AWARENESS OF DAILY FIBRE INTAKE REQUIREMENTS



59% CLAIM TO BE AWARE OF DAILY FIBRE YET, 89% WERE MISINFORMED*

*not aware, not sure, or inaccurately identified the daily intake requirements

CITY-WISE AWARENESS



DELHI

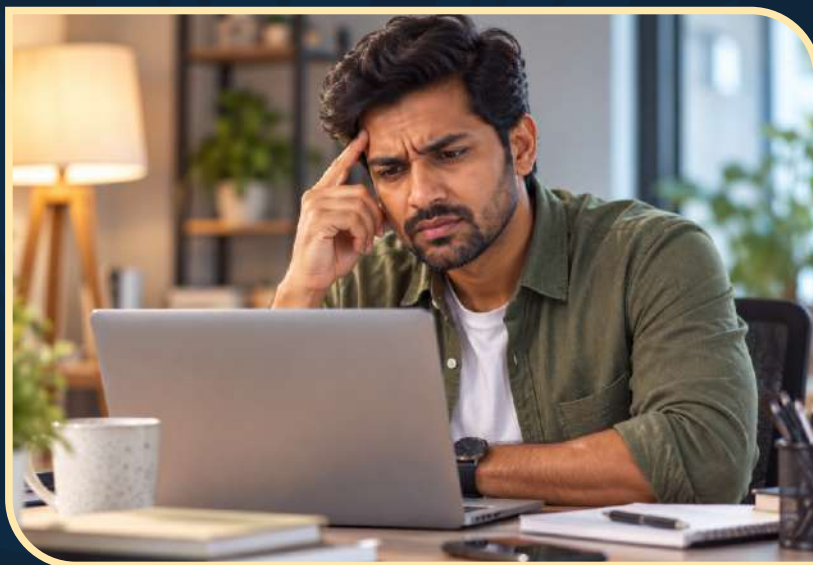
CONSUMERS ARE THE MOST MISINFORMED ABOUT DAILY FIBRE INTAKE REQUIREMENTS, FOLLOWED BY **KOLKATA** AND **KOCHI**



FIBRE **CONSUMPTION** IN URBAN INDIANS

61 %

CONSUME LESS THAN
RECOMMENDED DAILY
FIBRE INTAKE LEVELS



CONSUMPTION BY CITY

Below recommended daily intake levels



MUMBAI

59%



DELHI

62%



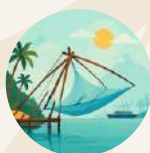
BENGALURU

58%



KOLKATA

61%



KOCHI

64%



CONSUMPTION ACROSS GENERATIONS

Below recommended daily intake levels



58% Gen Z



58% Millennials



65% Gen X

Fibre intake gap is observed across all five cities & generations

A Message from

DR. RAJ BHANDARI

MBBS, MD; Senior Pediatrician & Govt. Advisor

According to the survey report presented to me, the findings highlight a significant opportunity for India's nutrition agenda: improving nutrition literacy while making healthier choices easier to adopt. Dietary fiber remains an important yet under-recognized part of everyday nutrition, despite its role in gut health and overall dietary quality.

While 59% consumers claim to be aware of their daily dietary fibre requirements, 89% are either unable to identify the recommended intake, or are not aware/not sure of the daily intake levels, highlighting a clear gap between awareness and understanding. Protein, by contrast, has gained considerably stronger consumer visibility, although it is still often associated with athletes and supplementation rather than everyday nutrition.

As consumers increasingly seek nutrition guidance through digital and informal channels, there is a clear need for credible, evidence-based communication that builds understanding and translates knowledge into action.

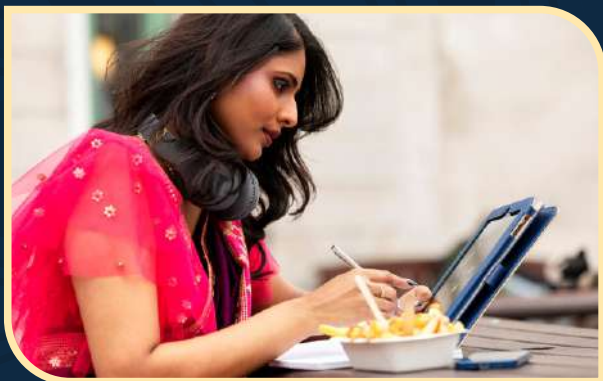
However, education alone is not enough. Lasting dietary change requires practical solutions. For dietary fiber in particular, the focus needs to shift from simply raising awareness to helping consumers recognise and choose everyday foods that can meaningfully contribute to their intake.

Taken together, the opportunity lies in strengthening nutrition literacy alongside practical food solutions that bring both protein and dietary fiber into everyday diets, through familiar formats that consumers can readily understand and incorporate into their routines.



BARRIERS URBAN INDIANS FACE TO CONSUME ENOUGH FIBRE

Convenience & Credibility emerge as the key constraints to Fibre consumption



69%

CONSUMERS FEEL THERE IS A
LACK OF CONVENIENT, CREDIBLE
FIBRE-FOCUSED FOOD OPTIONS

CITY WISE CONSTRAINTS TO FIBRE CONSUMPTION

Lack of Convenient Credible Fibre-Focused Food Options



KOCHI

74%



KOLKATA

72%



MUMBAI

71%



BENGALURU

69%



DELHI

61%

THE LACK OF CONVENIENT, CREDIBLE
FIBRE-FOCUSED FOOD OPTIONS WAS
THE MOST SIGNIFICANT BARRIER
ACROSS CITIES, IT BEING HIGHEST IN

KOCHI

FOLLOWED BY **KOLKATA** AND **MUMBAI**



A Message from

MS. ANUSHKA PARWANI

Founder – Anushka Yoga & Celebrity Wellness Expert

I've always believed that fitness goes far beyond the time you spend working out. Nourishing your body is equally important, and for me, good nutrition is about balance, consistency and making simple choices that provide the nutrients your body needs. Oats are one of those foods I find easy to incorporate into everyday meals, providing both protein and fibre. What stood out to me from the study is that while awareness around the importance of protein and fibre is growing, there is still a gap between knowing what we need and getting enough through our everyday diets.

I've always advocated for small, sustainable changes rather than drastic ones, and I believe incorporating nutritious, versatile foods like oats into everyday meals can be a simple step towards building more balanced eating habits



The future of everyday nutrition may not be about adding more complexity, but about making better choices easier to understand and easier to sustain. Protein and fibre need not be an either-or choice; both are essential parts of a balanced diet. The opportunity lies in empowering consumers to make mindful choices, simpler, practical & more sustainable.





PepsiCoIndia



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