



SRP



Emerging Trends in Asia's Sustainable Rice Consumption

India Edition - August 2023



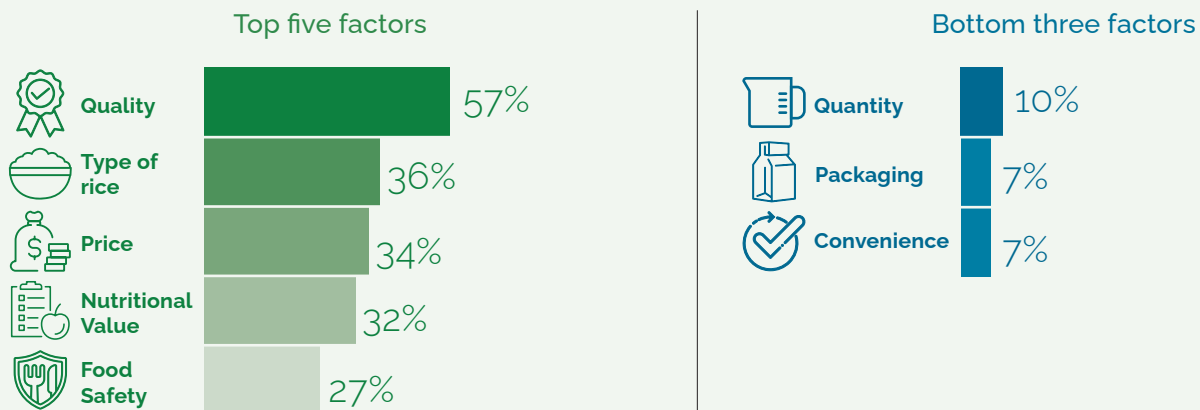
INDIA

All respondents across India enjoy rice frequently as part of their diet, consuming the staple five or more times a week. Three rice varieties are the most purchased, with white rice the preferred choice (76%). Consumption of this variety is highest in South India, while Basmati rice - a popular choice in India and Pakistan - is consumed most by those in Northern and Central regions.

Quality and type of rice and quality are primary drivers for purchasing sustainable rice

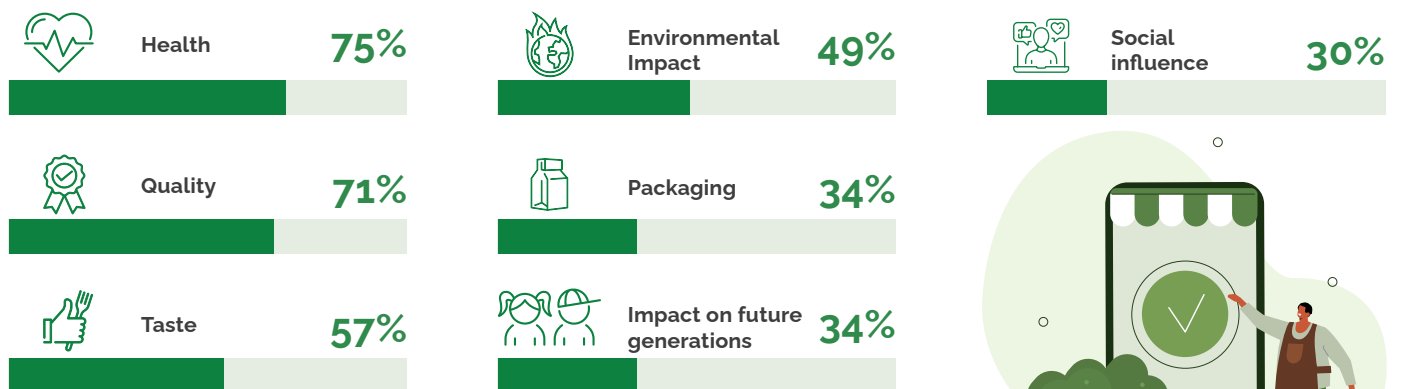
When purchasing rice, quality, type of rice and price are the most important factors for Indian consumers with least consideration placed on convenience and how the rice is packaged.

Most/least important factors when purchasing rice



Consumers in India display a good level of awareness of sustainable food overall, with 82% having purchased sustainable produce in some form. Health is cited as the primary driver of this decision, particularly for those aged over 40 years, with quality, taste and environmental impact ranked next.

Factors driving purchase of sustainable food produce

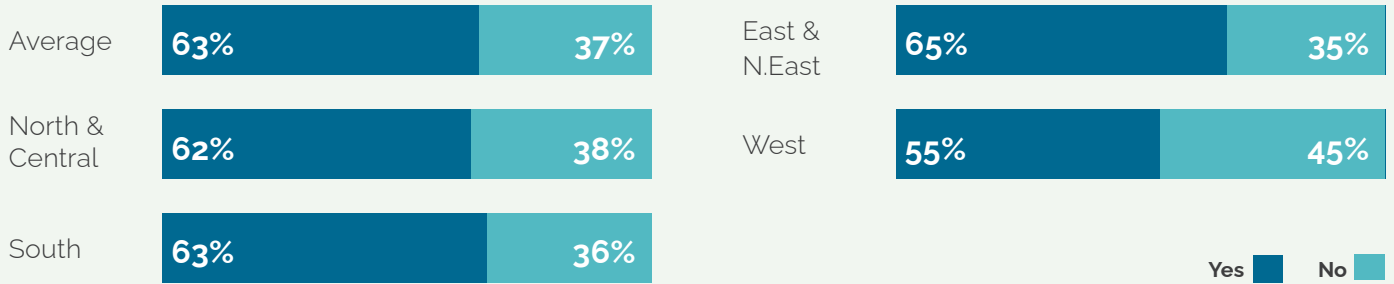


Awareness is highest in East and Northeast regions - lowest in West India

While awareness of sustainable food overall is high, significantly less are aware of sustainable rice. Awareness is lowest in West India and greatest in the East and Northeast regions. As with most countries surveyed, much of this recognition

is derived from social media. In India, word-of-mouth through family and friends, print media and television are also important factors in driving awareness.

Awareness of sustainable rice – by region

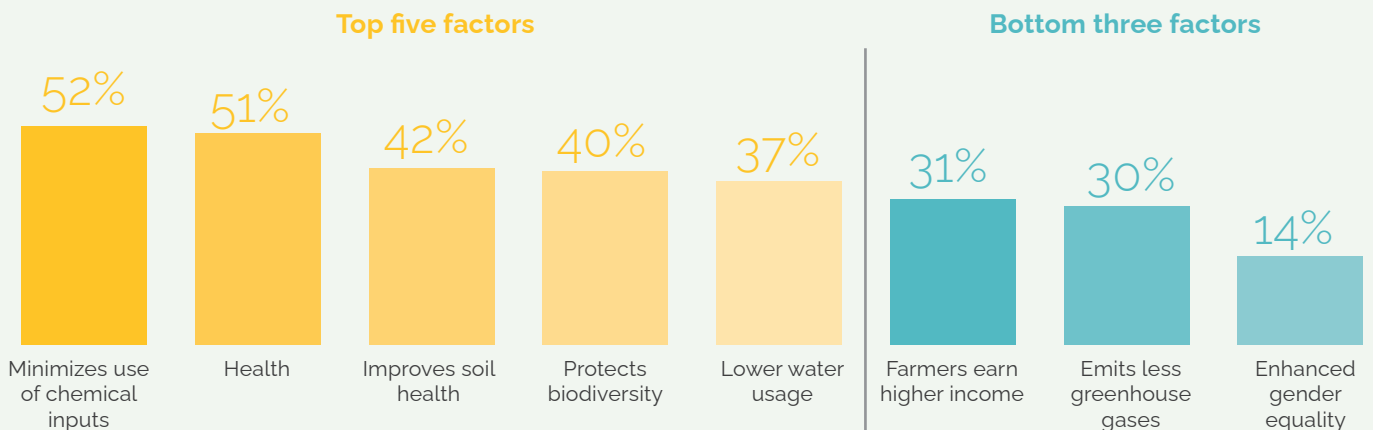


Sustainable rice is strongly associated with minimized chemical inputs, health benefits and improved soil health

Of the consumers who are aware of sustainable rice, many understand its positive environmental impact as well as its health benefits. Consumers identify the primary characteristics of sustainable rice as minimized use of chemical inputs, health benefits, and improved soil health; however, there is a lesser understanding of the positive social impacts of

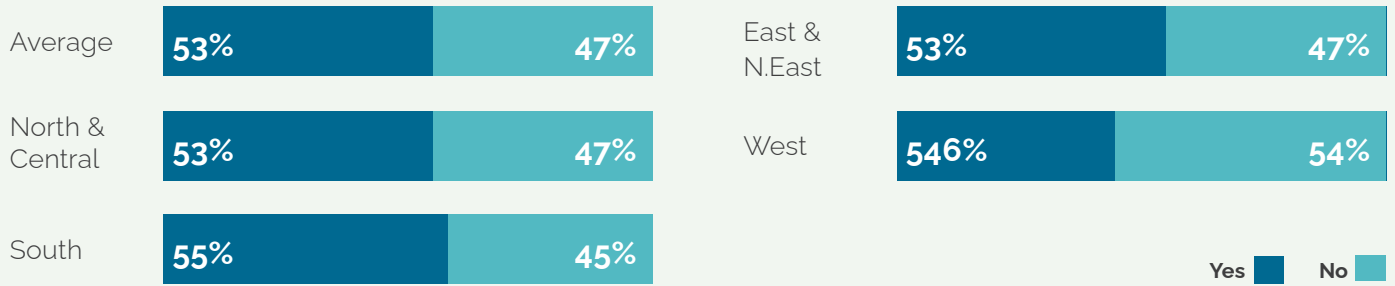
sustainable rice such as the ability for producers to earn a higher income and enhanced gender equality. In addition, consumers lack awareness of the impact sustainable rice farming practices have on lowering greenhouse gas emissions, a gap which could be reduced through greater knowledge.

Perceived characteristics of sustainable rice (Most/least frequently cited)



of consumers overall have purchased sustainable rice. This is lowest in West India (46%) but perhaps unsurprising as awareness is also lowest in this region.

Purchasing rates of sustainable rice



Younger generations willing to spend more

On average, people in India spend 207 INR (2.31 EUR) on rice, per purchase, and supermarkets are the most common point of sale (55%) – the highest of the countries surveyed. Local markets are also frequent points of purchase (53%). Around 32% of consumers purchase rice online or on e-commerce platforms - a significantly greater proportion than other countries in our survey. This trend is particularly true of consumers aged 30-39 and those living in North and Central regions (45%). Consumers in South India (23%) are least likely to purchase rice online, showing a strong preference for supermarket purchases.

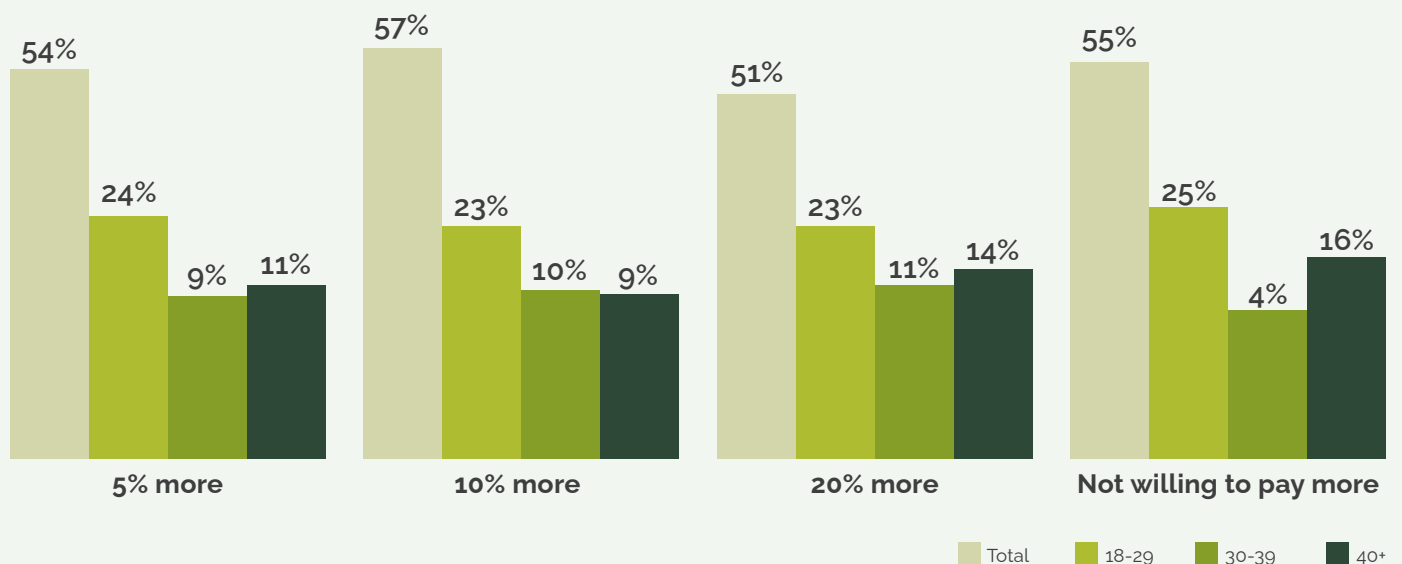
On average, consumers in North and Central India (59%) spend the most 222 INR (2.48 EUR) on rice while those in East and Northeast India are the lowest spenders, averaging 188 INR (2.10 EUR) per purchase, with purchases here most likely to be made at local markets.

Overall, 88% of Indians express willingness to pay more for sustainable rice, and this proportion is greatest amongst those who have previously purchased sustainable rice. On average, 55% are content with paying 5% more (greatest for those aged 18-29) and 24% are willing to pay 10% more with males more likely than females to absorb this cost (27% versus 19%). Only 9% are keen to spend 20% more - split broadly equally by gender, with those over 40 less inclined to do so.

Willing to pay more for sustainable rice?



Price sensitivity to paying more for sustainable rice – by age



Overall awareness of sustainable produce in India is high and remains a good platform for growing awareness of sustainable rice. Indians feel that climate change is the key challenge to agricultural output in the country, so driving awareness of critical, but lesser known, attributes of sustainable rice, such as its ability reducing greenhouse gases emissions is crucial in building knowledge around

the core challenges of standard rice practices.

Across all age groups, most consumers are willing to pay more for sustainable rice, so educating consumers on the benefits of sustainable rice, such as minimizing chemical inputs and health benefits, could be fruitful in terms of growing awareness and consumption.

Findings in this article are based on an online study commissioned by GIZ and conducted by YouGov in March 2022. The study targeted respondents who regularly consume rice and are responsible for household food purchases in India, Indonesia, Pakistan, Thailand, and Vietnam.





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