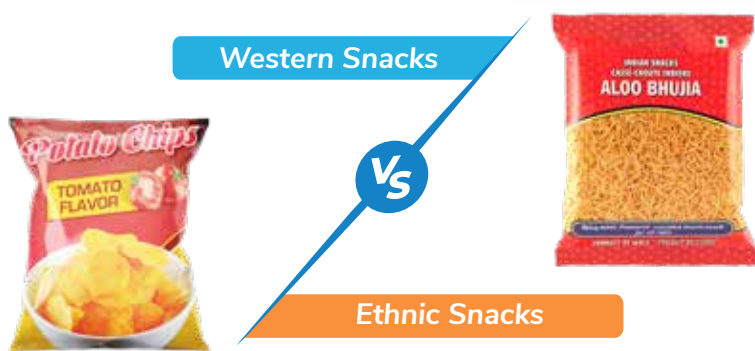


# INDIA'S SAVOURY SNACK MARKET

## Mapping the **Ethnic** vs. **Western Divide**

With near equal format split, the market is primed for repositioning, premiumization, and policy-aligned scale.

India's savoury snack market is booming — but growth is no longer format-agnostic.



### Western formats

(like chips and extruded snacks)

VS.

### Ethnic favourites

(like bhujia, sev, gathiya, chakli).

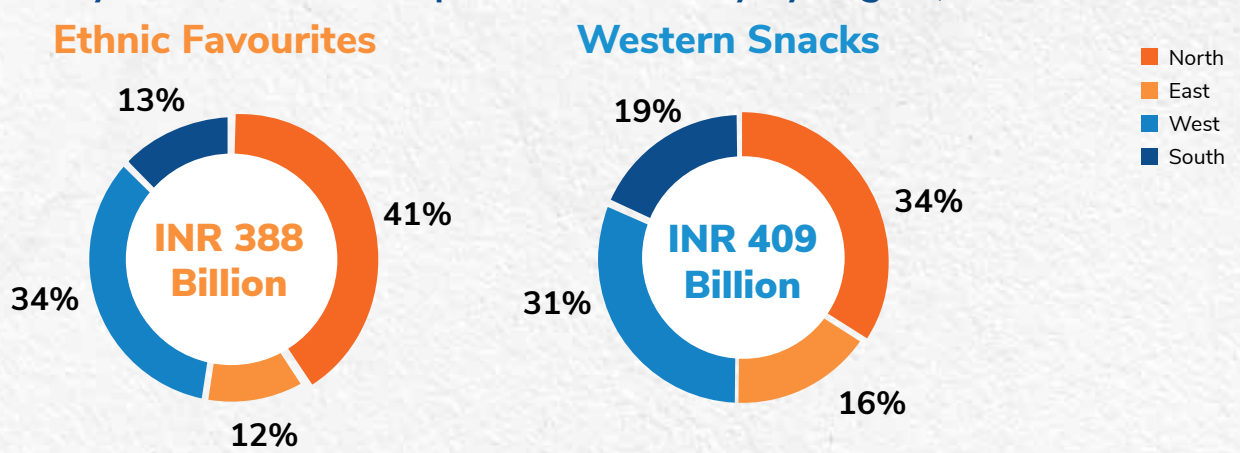
WHO'S WINNING NOW — AND WHO'S POISED TO SCALE NEXT?

## India's Snack Market: Ethnic vs. Western – A Closer Look

Western Snacks: ₹409B (~51%)

Ethnic Snacks: ₹388B (~49%)

India Savoury Snacks Market – Split of the industry by Region, FY 2023

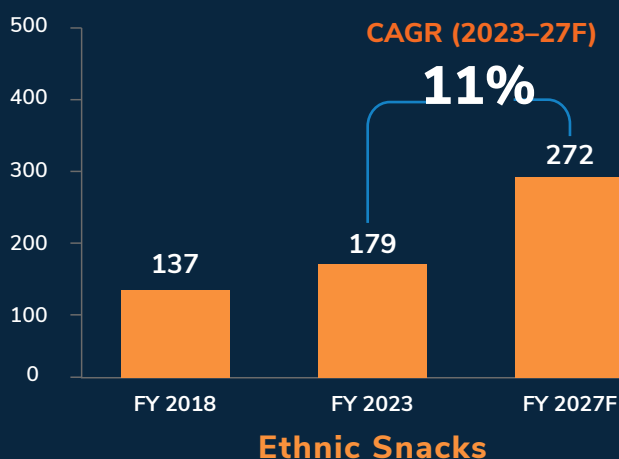


Source: Frost & Sullivan Analysis

THE MARKET IS NEARLY EVENLY SPLIT BUT THE NEXT BIG GROWTH WAVE COULD TILT THE BALANCE.

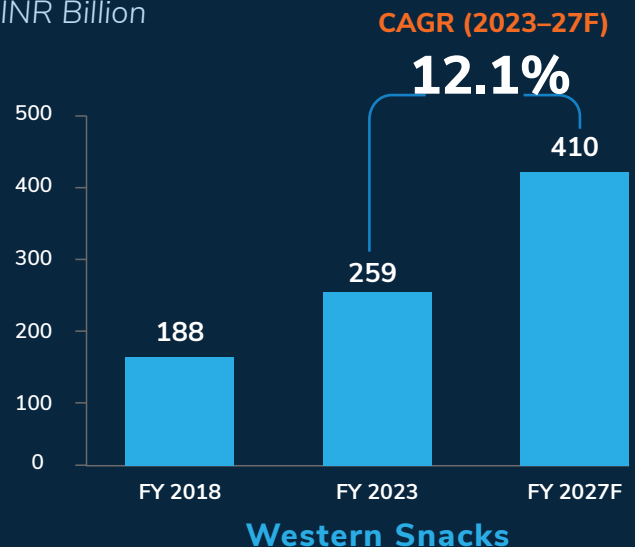
### Who's Growing Faster?

Organized Indian Ethnic Namkeen & Snacks Market-Market Growth  
INR Billion



Ethnic Snacks

Organized Western Snacks Market in India-Market growth  
INR Billion



Western Snacks

Source: Frost & Sullivan Analysis

WESTERN SNACKS CURRENTLY HAVE A GROWTH EDGE — BUT EVOLVING INDIAN CONSUMERS ARE ALSO DRIVING A PREMIUM PUSH WITHIN TRADITIONAL FORMATS.

### Key Drivers Behind Format Preferences:

- Ethnic snacks win on authenticity, nostalgia, and regional identity
- Western snacks lead in scale, packaging, and youth positioning
- Innovation is blurring the lines: fusion formats and healthier versions are reshaping both sides

FORMAT SUCCESS WILL DEPEND ON POSITIONING, PACKAGING, AND EVOLVING CONSUMER EXPECTATIONS

### Who Will Win the Next Growth Wave?

Growth will follow brands that:



**Reposition ethnic formats** for modern retail and export



**Modernize packaging, labeling, and shelf presence**



**Leverage e-commerce and D2C** for new consumer groups



**Tap Government schemes** to scale infrastructure, processing, and distribution

India's next snack leader may not come from chips but from a reimagined bowl of bhujia.

Explore how policy firepower is helping brands scale faster:

GAIN OUR GROWTH EXPERT'S VIEWS: [READMORE](#)

### How Government Funds Are Fueling Snack Scale-Ups

Frost & Sullivan works with food brands and manufacturers to:

- Identify growth white spaces across snack categories
- Reposition portfolios for new formats and markets
- Build policy-aligned scale-up and GTM roadmaps

**Let's power your next category breakthrough.**  
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