UNDERSTANDING CONSUMER TRENDS IN KENYA'S FOOD FLAVORING MARKET

Insights on Preferences, Behaviors and Market Opportunities.

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Introduction

Introduction

Kenyans are increasingly incorporating food flavoring agents into home cooking, influenced by tradition, global culinary trends, and the growing availability of pre-packaged seasonings and sauces.

This blend of traditional and contemporary flavoring methods reflects the evolving food culture in Kenya, balancing heritage with modern convenience.

The food flavoring agents enhance the taste, aroma, and appeal of homemade foods, processed foods, and drinks, catering to different dietary needs.

Flavoring agents, both natural and synthetic, are employed in a wide range of products, including snacks, beverages, dairy products, and baked foods.

This report is a synthesis of what we have learned from **150** Kenyans interviewed across the five major cities/towns of **Nairobi, Mombasa, Kisumu, Eldoret, and Meru**.

By asking the same questions across the five towns, we have established the general food flavoring culture in Kenya.

Demographics

Sample Achieved by Region

Town	Sample
Nairobi	N=30
Mombasa	N=30
Eldoret	N=30
Kisumu	N=30
Meru	N=30
Total Sample	**N=150**

Family Size

4.4

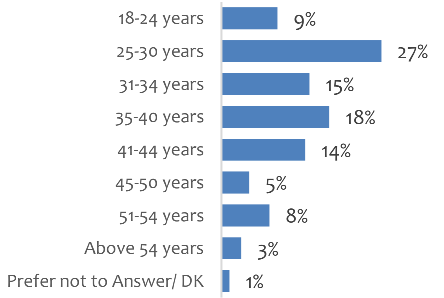
Is the average number of people per surveyed household

Gender

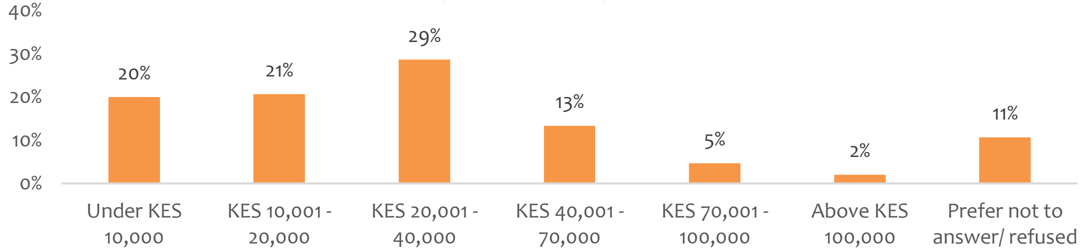
25%

75%

Age



Household Income



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Summary of Findings

Summary of Findings …1

The report highlights key insights into Kenyan food flavoring culture, focusing on cooking habits, flavoring agent usage, flavoring brand awareness, and preferences among consumers.

Category:

- The food flavoring market in Kenya shows notable gender and age-based differences in cooking habits, presenting strategic opportunities. Women represent a key demographic, with 93% cooking daily, compared to 53% of men.

Usage Behaviors and Preferences:

- Fresh herbs and spices dominate, with **Dhania** (91%) and **Ginger** (88%) leading in usage, particularly among women and the 31-40 age group. **Garlic** usage varies regionally, showing strong acceptance in Eldoret.
- The limited adoption of ready-made sauces (53% non-users) contrasts with higher usage of bouillon cubes (67%), indicating a strong preference for fresh ingredients.

Summary of Findings …2

Opportunities and Gaps:

- There's a significant gap in the market for health-conscious options, with 70% not using any. The popularity of coconut oil (27% overall) suggests an opportunity for brands to educate consumers on healthier alternatives.
- Additionally, honey leads as a preferred sweetener (55%), indicating a trend towards natural options.

Brand Awareness and Loyalty:

- Royco dominates brand awareness (99%), but struggles with customer loyalty (45%).
- Smaller brands show potential but face challenges converting awareness into usage and loyalty.
- Strategies focusing on authenticity and health benefits could enhance their market presence.

Summary of Findings …3

Consumer Preferences:

- Trust, quality, and health consciousness are critical to brand loyalty. Brands like Royco leverage generational trust, while Tropical Heat appeals through practical packaging.

Marketing Recommendations:

- Brands should utilize traditional media (TV: 87%, Radio: 65%) alongside social media to boost visibility.
- Educational campaigns promoting the benefits of ready-made options and health-focused products could drive consumer engagement and loyalty in this competitive landscape.

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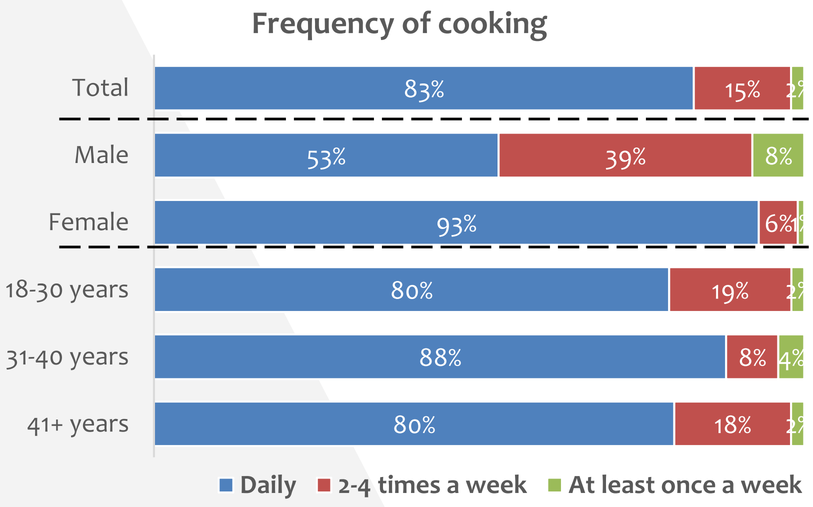
What the Data Tells Us

Frequency of Cooking

The data reveals clear gender and age-based differences in cooking habits across Kenya, highlighting strategic opportunities for the food flavoring market. Women, with 93% cooking daily, represent the core target for everyday flavoring products, while men, at 53% daily, lean toward less frequent cooking, presenting an opportunity for convenient, easy-to-use solutions. Additionally, 39% of men cook 2-4 times a week, suggesting a growing segment for ready-to-cook or pre-mixed flavoring options tailored to their needs.



Age-wise, younger consumers (18-30) show a slightly lower daily cooking rate (80%) compared to those aged 31-40 (88%), indicating a possible openness to experimenting with new flavors. Meanwhile, the older demographic (41+) mirrors younger trends but may lean more towards traditional cooking preferences. This underscores an opportunity to innovate with bold, modern flavors for younger audiences while preserving familiar, trusted seasonings for older consumers.

Qn: How often do you personally prepare your own food?

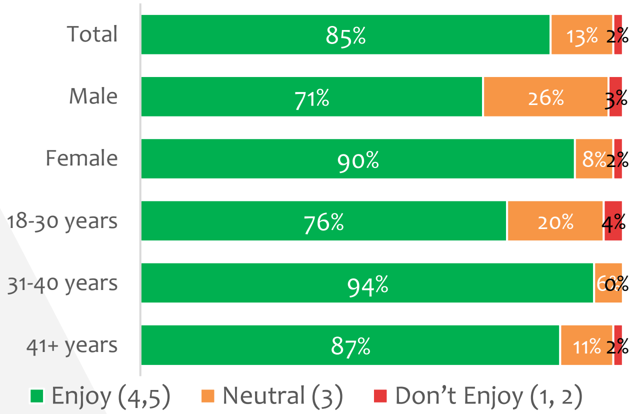
Sample: Total, 150; Male,38 : Female,112 : 18-30 yrs., 54; 31-40 yrs,49 : 41+yrs, 45:

Do Kenyans Enjoy Cooking?

The analysis of cooking enjoyment in Kenya reveals that 85% of respondents take pleasure in cooking (coded 4 & 5), with women (90%) expressing a stronger affinity than men (71%). This positive sentiment positions women as a primary target for flavoring products designed to enhance their culinary experiences. Notably, the 31-40 age group leads in enjoyment at 94%, suggesting that established routines and family dynamics contribute to their engagement in cooking. Conversely, younger consumers (18-30) report lower enjoyment at 76%, indicating a potential gap in appealing to this demographic.

85%

Of Kenyans Enjoy Cooking (i.e. coded 4 & 5 Overall)



Barriers to cooking enjoyment include time constraints, feelings of repetitiveness, concerns about cooking skills, and dislike of post-cooking cleanup. Addressing these challenges presents opportunities for brands to innovate by offering convenient, time-saving solutions and diverse flavoring options that add excitement to cooking. By aligning product offerings with the preferences of women and the 31-40 age group while also tackling the concerns of younger consumers, brands can foster greater engagement and satisfaction in the food flavoring category.

Qn: On a scale of 1-5, where 1= you least enjoy, and 5= you most, how would you say you enjoy cooking?

Sample: Total, 150; Male, : Female, : 18-30 yrs., ; 31-40 yrs., : 41+yrs:

Usage - Fresh Herbs and Spices

The analysis of the use of fresh herbs and spices across various demographics reveals significant preferences within the Kenyan market. Dhania (coriander) stands out with a high overall usage rate of 91%, consistently favored across regions and demographics, particularly among females (92%) and the 31-40 age group (93%). Ginger follows closely, with an 88% usage rate, showing notable engagement in Eldoret(97%) and similar acceptance among genders and age groups. In contrast, fresh garlic has an overall usage rate of 83%, but significant regional variations emerge, particularly in Mombasa (73%) and Eldoret(93%).

	Total (n =150)	Nairobi n= 30	Mombasa n= 30	Kisumu n= 30	Eldoret n= 30	Meru n= 30	Male n= 38	Female n= 112	18-30 yrs. n= 54	31-40 yrs. n= 49	41+ yrs. n= 45
Dhania/coriander	91%	90%	90%	90%	87%	100%	92%	91%	93%	88%	93%
Ginger	88%	83%	83%	97%	93%	83%	89%	88%	85%	90%	89%
Garlic (Fresh)	83%	73%	90%	73%	93%	83%	79%	84%	80%	88%	80%
Capsicum	61%	73%	50%	63%	40%	80%	63%	61%	48%	69%	67%
Green pepper	34%	23%	43%	53%	27%	23%	42%	31%	31%	33%	38%
Turmeric	29%	30%	30%	33%	20%	30%	29%	29%	33%	31%	22%
Rosemary	25%	20%	7%	47%	13%	37%	21%	26%	15%	27%	33%
Cinnamon	19%	27%	23%	23%	3%	20%	16%	21%	17%	22%	20%
Cloves	13%	17%	7%	17%	7%	17%	8%	14%	15%	16%	7%
Cardamom	11%	10%	17%	13%	10%	7%	8%	13%	13%	14%	7%
Thyme	3%	7%	0%	3%	7%	0%	5%	3%	4%	4%	2%

Qn: Which of the following Fresh Herbs and Spices have you used in the past three months?

Usage – Seasoning Cubes or Powders

The analysis of seasoning cubes and powders reveals a moderate market acceptance, with 67% of respondents using bouillon and stock cubes, especially in Nairobi (80%). This preference aligns with previous findings on fresh herbs, indicating a demand for convenient flavor enhancers. Males exhibit higher usage (74%) compared to females (64%), suggesting an opportunity to engage women more effectively. However, the 29% of respondents who do not use any seasoning products contrasts sharply with the widespread use of fresh herbs, highlighting a segment of consumers who may prefer the natural flavors of herbs over processed options.

	Total (n =150)	Nairobi n= 30	Mombasa n= 30	Kisumu n= 30	Eldoret n= 30	Meru n= 30	Male n= 38	Female n= 112	18-30 yrs. n= 54	31-40 yrs. n= 49	41+ yrs. n= 45
Bouillon and stock cubes (e.g., Beef stock cubes,...	67%	80%	67%	63%	53%	70%	74%	64%	70%	63%	67%
Garlic (Processed)	17%	23%	20%	23%	13%	3%	16%	17%	15%	27%	9%
Onion powder	10%	10%	13%	17%	10%	0%	11%	10%	15%	8%	7%
Monosodium Glutamate (MSG)	2%	0%	3%	3%	3%	0%	3%	2%	0%	2%	4%
None	29%	20%	23%	33%	40%	30%	24%	31%	26%	31%	31%

Qn: Which of the following Seasoning Cubes or Powders have you used in the past three months?

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Usage - Ready-made Sauces

The findings on ready-made sauces indicate limited usage, with 53% of respondents not using any products in this category, which is notably high compared to the acceptance of bouillon cubes (67% usage) and fresh herbs like dhania. Coconut cream (21%) and coconut oil (21%) are the most commonly used, particularly in Mombasa, where coconut cream usage rises to 33%. This suggests an urban preference for specific coconut-based products. However, the significant portion of consumers not utilizing any ready-made sauces implies a preference for fresh ingredients, echoing previous findings on herbs. Brands should consider targeting this segment with education on the benefits of ready-made sauces, particularly how they can complement the use of fresh ingredients in cooking, thus encouraging trial and expanding market penetration.

	Total (n =150)	Nairobi n= 30	Mombasa n= 30	Kisumu n= 30	Eldoret n= 30	Meru n= 30	Male n= 38	Female n= 112	18-30 yrs. n= 54	31-40 yrs. n= 49	41+ yrs. n= 45
Coconut Cream	21%	20%	33%	33%	13%	3%	29%	18%	20%	24%	18%
Coconut Oil	21%	23%	30%	13%	13%	23%	32%	17%	22%	16%	22%
Coconut Milk	17%	20%	27%	23%	7%	7%	26%	13%	15%	18%	16%
Vinegar	15%	20%	7%	20%	7%	23%	3%	20%	19%	14%	13%
Tamarind	11%	0%	13%	37%	3%	0%	11%	11%	4%	14%	13%
Desiccated Coconut	6%	3%	10%	10%	7%	0%	8%	5%	4%	8%	7%
Marinades	4%	3%	7%	3%	7%	0%	8%	3%	4%	6%	2%
None	53%	50%	43%	33%	73%	63%	50%	54%	54%	49%	56%

Qn: Which of the following ready-made Sauces have you used in the past three months?

Usage – Salt and Black Paper

Regards salt and black pepper usage, analysis shows that both fall under the category of essential seasonings, with salt showing universal adoption at 100% across all demographics. In contrast, black pepper is used by only 31% of respondents overall, with significant variation by region—particularly higher usage in Kisumu (50%). Encouraging the use of black pepper alongside salt could enhance flavor profiles in everyday cooking, potentially increasing its adoption.

	Total (n =150)	Nairobi n= 30	Mombasa n= 30	Kisumu n= 30	Eldoret n= 30	Meru n= 30	Male n= 38	Female n= 112	18-30 yrs. n= 54	31-40 yrs. n= 49	41+ yrs. n= 45
Salt	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Black pepper	31%	27%	27%	50%	17%	33%	24%	33%	35%	35%	22%

Qn: Which of the following have you used in the past three months?

Usage – Chili and Hot Pepper

As for chili pepper and chili sauce usage, these products are moderately popular, with 47% of respondents using chili peppers and 35% using chili sauce. Notably, chili sauce usage peaks in Kisumu at 57%, suggesting a regional preference that brands could leverage. The data indicates a significant segment, 33%, do not use either chili peppers or chili sauce, underscoring an opportunity for market expansion. This gap may be addressed through targeted marketing that highlights the versatility and flavor enhancement capabilities of these products, especially among younger consumers (18-30 years) who may be more open to experimenting with spicy flavors.

	Total (n =150)	Nairobi n= 30	Mombasa n= 30	Kisumu n= 30	Eldoret n= 30	Meru n= 30	Male n= 38	Female n= 112	18-30 yrs. n= 54	31-40 yrs. n= 49	41+ yrs. n= 45
Chili peppers	47%	53%	43%	50%	47%	40%	53%	45%	50%	51%	40%
Chili Sauce	35%	30%	30%	57%	0%	37%	39%	33%	33%	39%	33%
None	33%	23%	40%	27%	43%	33%	24%	37%	28%	29%	42%

Qn: Which of the following have you used in the past three months?

Usage – Natural Flavor Enhancers

In terms of natural flavor enhancers, products like sweeteners, such as honey and maple syrup, are the most widely used (42%), with higher adoption in Kisumu (57%) and Eldoret(47%), while Nairobi shows lower usage (27%). Vanilla extract is the next most popular enhancer at 15%, with notable variation between Nairobi (23%) and Mombasa (7%). Almond extract and liquid smoke have very limited adoption at just 3% each. Interestingly, 50% of respondents do not use any natural flavor enhancers, with this figure peaking in Nairobi (60%) and among males (53%), suggesting a potential area for growth through targeted awareness and education efforts.

	Total (n =150)	Nairobi n= 30	Mombasa n= 30	Kisumu n= 30	Eldoret n= 30	Meru n= 30	Male n= 38	Female n= 112	18-30 yrs. n= 54	31-40 yrs. n= 49	41+ yrs. n= 45
Sweeteners (e.g., honey, maple syrup, etc.)	42%	27%	37%	57%	47%	43%	45%	41%	41%	45%	40%
Vanilla extract	15%	23%	7%	20%	13%	10%	16%	14%	9%	18%	18%
Almond extract	3%	3%	0%	10%	3%	0%	3%	4%	4%	2%	4%
Liquid smoke	3%	0%	0%	7%	10%	0%	3%	4%	4%	2%	4%
None	50%	60%	60%	33%	43%	53%	47%	51%	54%	47%	49%

Qn: Which of the following natural flavor enhancers have you used in the past three months?

Usage – Homemade Spice Blends

The use of homemade spice blends is dominated by the Fresh Garlic and Ginger mix, with 81% of respondents using it, showing consistent usage across regions, peaking in Kisumu and Eldoret 87%. Gender-wise, males (82%) and females (81%) show similar adoption rates. Custom spice blends are less popular, with only 8% of respondents using them, with the highest usage in Mombasa and Kisumu (13%) and none in Meru. Notably, 17% of respondents do not use homemade spice blends at all, with this figure highest among males (30%), indicating potential areas for increased customization and innovation in spice blending preferences

	Total (n =150)	Nairobi n= 30	Mombasa n= 30	Kisumu n= 30	Eldoret n= 30	Meru n= 30	Male n= 38	Female n= 112	18-30 yrs. n= 54	31-40 yrs. n= 49	41+ yrs. n= 45
Fresh Garlic and Ginger mix	81%	83%	80%	87%	87%	70%	82%	81%	83%	80%	84%
Custom spice blends used at home	8%	7%	13%	13%	7%	0%	8%	8%	7%	12%	4%
None	17%	17%	17%	13%	10%	30%	16%	18%	15%	18%	16%

Qn: Which of the following homemade spice blends have you used in the past three months?

Usage – Pre-packaged Masalas/Curry Powders

The adoption of prepackaged masalas and curry powders is significant, with 59% of respondents using pre-packaged masala blends, particularly favored in Meru (80%) and Kisumu (63%). Curry powder usage is also notable, with 50% overall adoption; however, this varies regionally, peaking at 63% in Mombasa. Gender-wise, both males and females exhibit similar usage rates, though males show slightly higher engagement with masalas (53%) compared to females (61%). Interestingly, 20% of respondents reported not using these products, with the highest non-usage in Nairobi (33%) and among males (26%) .

	Total (n =150)	Nairobi n= 30	Mombasa n= 30	Kisumu n= 30	Eldoret n= 30	Meru n= 30	Male n= 38	Female n= 112	18-30 yrs. n= 54	31-40 yrs. n= 49	41+ yrs. n= 45
Pre-packaged masala blends (e.g., for biryani, pilau)	59%	50%	57%	63%	43%	80%	53%	61%	59%	59%	58%
Curry powder	50%	27%	63%	53%	53%	53%	50%	50%	54%	51%	44%
None	20%	33%	17%	23%	20%	7%	26%	18%	17%	16%	27%

Qn: Which of the following have you used in the past three months?

Usage – Health-conscious Options

The findings on health-conscious options reveals a marked preference for coconut oil compared to other alternatives. Overall, 27% of respondents reported using coconut oil, with notably higher usage at 43% in Nairobi. In contrast, only 5% reported using coconut flour, and just 4% opted for low-sodium or MSG-free seasoning cubes and powders. A significant 70% of participants indicated they do not use any health-conscious options, highlighting a substantial market gap. Compared to ready-made sauces, which are utilized by 53% of respondents, the demand for health-focused products remains low. This disparity suggests a potential opportunity for brands to effectively market healthier alternatives and educate consumers about their benefits to drive adoption.

	Total (n =150)	Nairobi n= 30	Mombasa n= 30	Kisumu n= 30	Eldoret n= 30	Meru n= 30	Male n= 38	Female n= 112	18-30 yrs. n= 54	31-40 yrs. n= 49	41+ yrs. n= 45
Coconut oil	27%	43%	27%	23%	13%	27%	34%	24%	35%	20%	24%
Coconut flour	5%	0%	7%	13%	3%	0%	5%	4%	2%	2%	11%
Low-sodium or MSG-free...	4%	3%	7%	7%	3%	0%	3%	4%	4%	4%	4%
None	70%	53%	70%	67%	87%	73%	66%	71%	65%	76%	69%

Qn: Which of the following health-conscious options have you used in the past three months?

Usage - Sweeteners

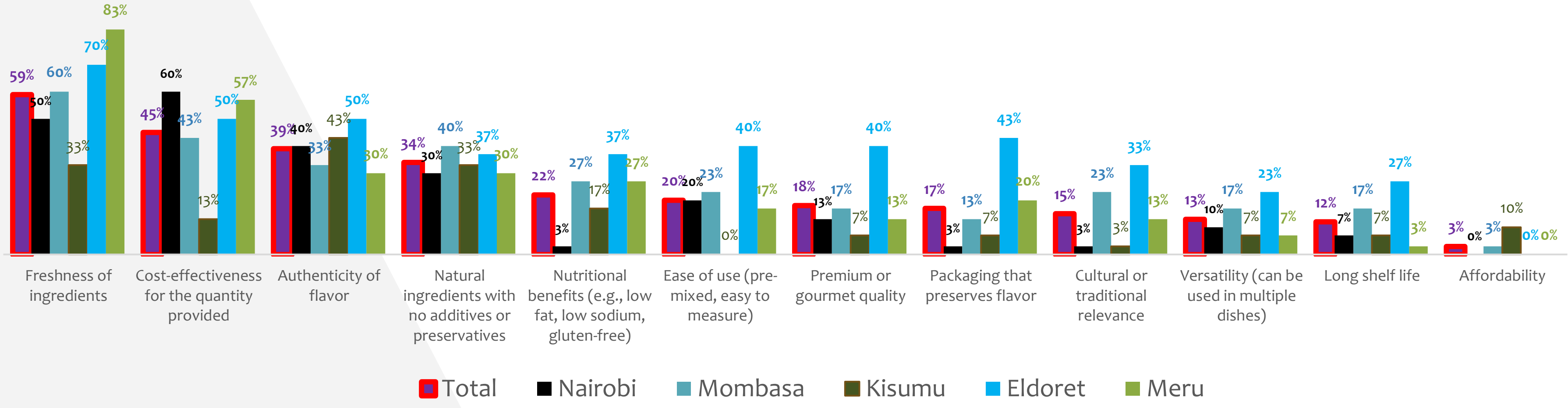
Data on sweetener usage shows a strong preference for honey at 55%, particularly in Kisumu (67%) and Mombasa (63%), indicating a trend toward natural sweeteners. Brown sugar (43%) and cane sugar (17%) are less favored. In comparison, pre-packaged masalas (59%) and curry powders (50%) demonstrate robust popularity as flavor enhancers. However, 35% of respondents reported not using any sweeteners, presenting a significant opportunity for brands to market natural alternatives alongside established flavoring agents, appealing to health-conscious consumers seeking healthier options.

	Total (n =150)	Nairobi n= 30	Mombasa n= 30	Kisumu n= 30	Eldoret n= 30	Meru n= 30	Male n= 38	Female n= 112	18-30 yrs. n= 54	31-40 yrs. n= 49	41+ yrs. n= 45
Honey	55%	47%	63%	67%	43%	57%	66%	52%	50%	59%	56%
Brown sugar	43%	30%	53%	40%	53%	37%	55%	38%	52%	41%	33%
Cane sugar	17%	13%	33%	3%	33%	3%	21%	16%	15%	27%	11%
Molasses	5%	0%	3%	7%	7%	7%	5%	4%	6%	0%	9%
Date syrup	5%	3%	7%	10%	3%	0%	11%	3%	4%	6%	4%
Maple syrup	4%	0%	3%	10%	3%	3%	5%	4%	4%	4%	2%
Coconut sugar	3%	0%	10%	3%	3%	0%	8%	2%	4%	0%	4%
Stevia	2%	3%	3%	0%	3%	0%	3%	2%	2%	2%	2%
Agave syrup	2%	0%	3%	3%	3%	0%	3%	2%	0%	2%	4%
Monk fruit sweetener	2%	0%	3%	3%	3%	0%	3%	2%	0%	4%	2%
None	35%	43%	33%	27%	40%	33%	32%	37%	37%	33%	38%

Qn: Which of the following sweeteners have you used in the past three months?

Key Considerations when Choosing Food Flavoring Agent

Data on sweetener usage shows a strong preference for honey at 55%, particularly in Kisumu (67%) and Mombasa (63%), indicating a trend toward natural sweeteners. Brown sugar (43%) and cane sugar (17%) are less favored. In comparison, pre-packaged masalas (59%) and curry powders (50%) demonstrate robust popularity as flavor enhancers. However, 35% of respondents reported not using any sweeteners, presenting a significant opportunity for brands to market natural alternatives alongside established flavoring agents, appealing to health-conscious consumers seeking healthier options.



Qn: How often do you personally prepare your own food?

Sample: Total, 150; Nairobi,30 : Nairobi,30 : Mombasa,30 : Kisumu,30 : Eldoret,30 : Meru,30 :

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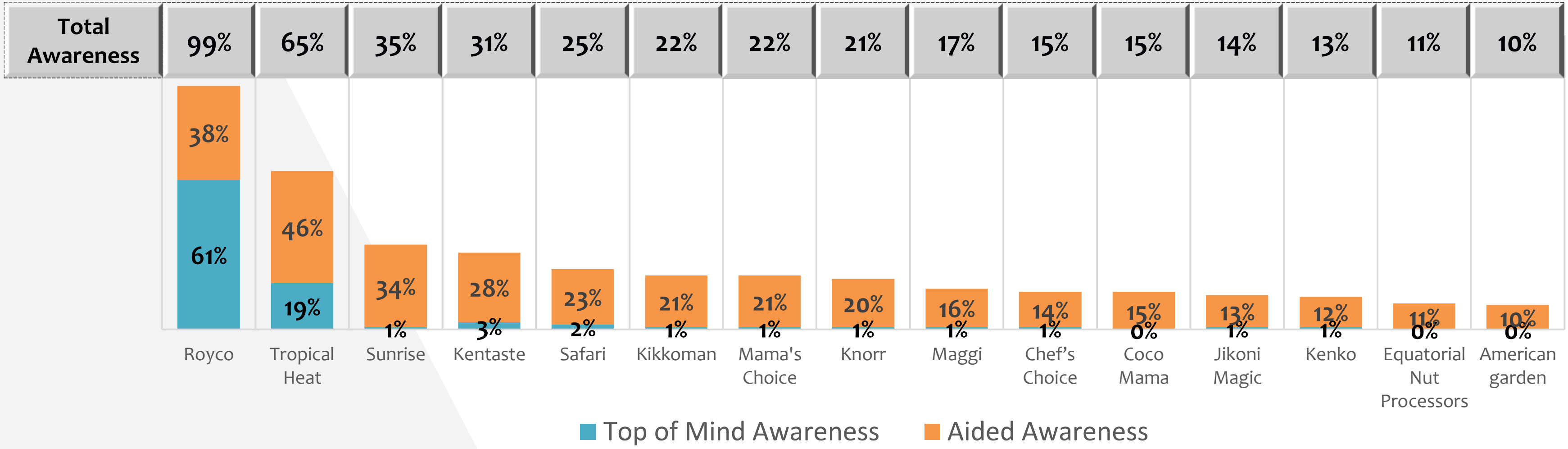
Food Flavor Enhancer Brand Awareness – Top 15 Brands

The overall brand awareness for food flavoring agents reveals Royco's dominance with 99% total awareness, driven by strong top-of-mind recognition (61%). Tropical Heat (65%) and Sunrise (34%) follow, benefiting primarily from aided awareness, indicating their less immediate recall but significant brand recognition when prompted. Kentaste (28%) and Safari (23%) also perform well in aided awareness, while smaller brands like Kikkoman (21%) and Mama's Choice (21%) struggle with lower visibility. This data suggests that brands with high aided awareness could improve top-of-mind positioning through stronger branding and marketing efforts.

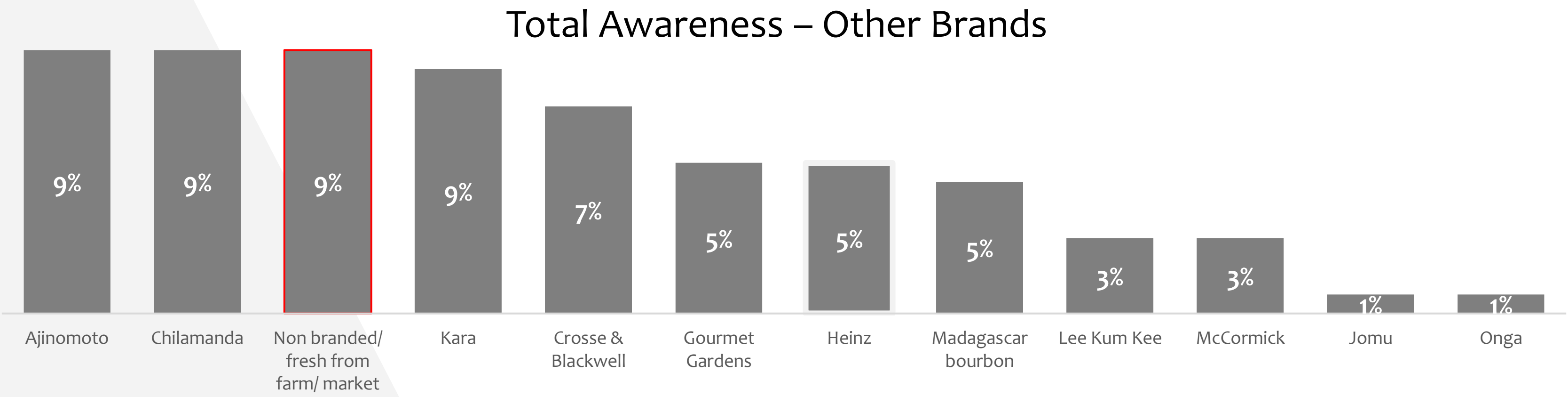


Qn. Top-of-mind awareness. Which brands of food flavoring agents are you aware of?
Qn. Aided awareness. Which of the following brands of food flavoring agents are you aware of?

Sample n150

Food Flavor Enhancer Brand Awareness – Other Brands

Additionally, while leading brands like Royco (99%) dominate total awareness, smaller brands such as Ajinomoto (9%) and Chilamanda (9%) and Kara (9%) also exhibit notable presence. However, many niche brands like Cross & Blackwell (7%), Gourmet Gardens (5%) and Heinz (5%) lag behind in awareness. Non-branded or fresh-from-market options (9%) also show a preference for more organic sources. These smaller brands present opportunities for growth, particularly if they can leverage authenticity, health benefits, or cultural relevance to compete with larger, more established brands.



Qn. Top-of-mind awareness. Which brands of food flavoring agents are you aware of?
Qn. Aided awareness. Which of the following brands of food flavoring agents are you aware of?

Sample n150

Food Flavor Enhancer Brand Total Brand Awareness-By Demographics

The top 10 brands show significant demographic variation. Royco leads across all regions and demographics with near-total awareness (99%). Tropical Heat shows strong performance in Mombasa (77%) and among males (71%), while Sunrise has its highest awareness in Meru (43%). Kentaste performs better in Eldoret(40%) and among females (34%). Safari and Kikkoman awareness is relatively low but higher in Meru and Kisumu respectively. These insights highlight regional preferences and opportunities for targeted marketing strategies.

Top 10 Brands

	Total	Nairobi n= 30	Mombasa n= 30	Kisumu n= 30	Eldoret n= 30	Meru n= 30	Male n= 38	Female n= 112	18-30 yrs. n= 54	31-40 yrs. n= 49	41+ yrs. n= 45
Royco	99%	100%	100%	97%	97%	100%	100%	98%	100%	100%	96%
Tropical Heat	65%	63%	77%	67%	57%	60%	71%	63%	61%	69%	62%
Sunrise	35%	20%	40%	27%	37%	43%	42%	32%	33%	37%	31%
Kentaste	31%	31%	30%	20%	40%	37%	30%	34%	30%	31%	29%
Safari	25%	25%	7%	33%	27%	40%	17%	32%	22%	24%	29%
Kikkoman	22%	22%	20%	27%	23%	20%	20%	24%	21%	31%	16%
Mama's Choice	22%	22%	17%	20%	20%	17%	37%	26%	21%	20%	20%
Knorr	21%	21%	7%	40%	13%	40%	3%	24%	20%	15%	20%
Maggi	17%	17%	20%	20%	10%	27%	7%	18%	16%	11%	12%
Chef's Choice	15%	15%	10%	13%	23%	17%	13%	13%	16%	13%	16%

Qn. Top-of-mind awareness. Which brands of food flavoring agents are you aware of?; Qn. Aided awareness. Which of the following brands of food flavoring agents are you aware of?

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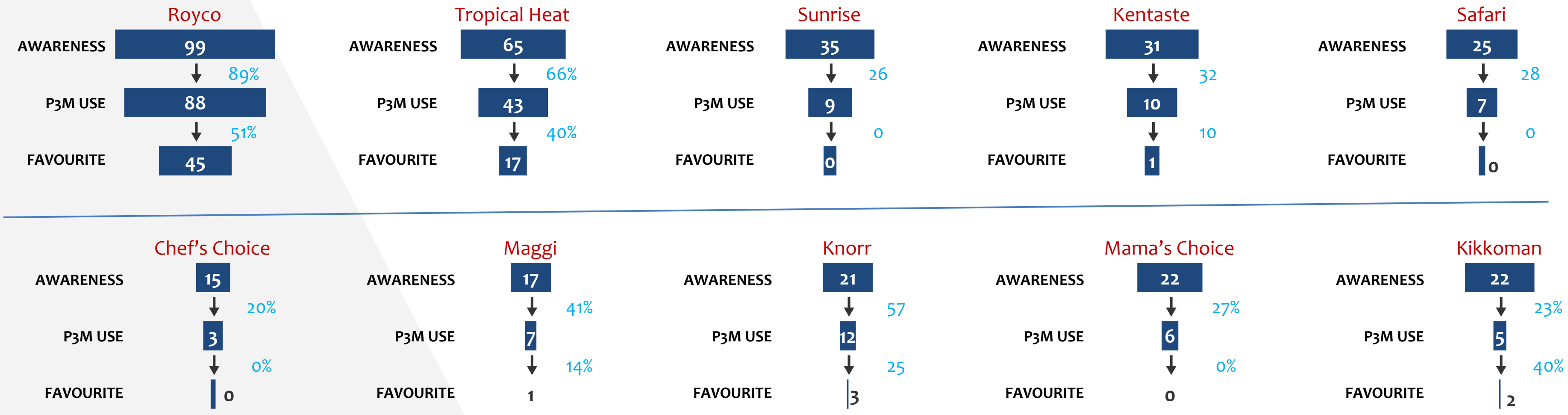
Brand level Analysis/ Brand Conversion – Top 10 Used Brands

Analyzing the conversion rates from awareness to usage and loyalty, Royco dominates with 99% awareness, 88% usage, and 45% loyalty, showing a strong conversion of 51% from trials to favorite status. Tropical Heat follows with 65% awareness, 43% usage, and 17% loyalty, demonstrating a notable 39% conversion rate. Other brands, such as Sunrise and Kentaste, show lower conversions from usage to favorite at 0% and 10%, respectively. Overall, most food flavor enhancing brands struggle to retain loyalty after trials, with many like Safari and Sunrise having zero loyalty despite moderate trials. Maintaining brand loyalty after usage remains a challenge for most brands in this category.



Qn. Which brands of food flavoring agents are you aware of?;
Qn. Which of the following brands of food flavoring agents have you used in the past three months?
Qn. Which one brand of food flavoring agents used in the past three months is your favorite?

Sample n150

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Brand level Analysis/ Brand Conversion – Other Small Used Brands

Just like the bigger brands, smaller brands also face significant challenges in converting awareness into usage and loyalty, with many exhibiting low conversion rates in the category. **Notably, Non-branded/fresh from farm/market products show a higher conversion rate from 5% trial to 3% loyalty (60% conversion rate), indicating a strong preference for local alternatives.** Brands like Kenko also show niche success with moderate loyalty despite low overall awareness. In contrast, several brands, such as Ajinomoto, Chilamanda, and Heinz, struggle with minimal loyalty despite some level of awareness and usage.

Brand	Awareness	Used Past 3 Months	Favorite Brand
Coco Mama	15%	3%	0%
Jinani Magic	14%	3%	0%
Kenko	13%	3%	1%
Equatorial Nut Processors	11%	1%	0%
American garden	10%	3%	0%
Ajinomoto	9%	1%	0%
Chilamanda	9%	1%	0%
Non branded/ fresh from farm/ market	9%	5%	3%
Kara	9%	3%	0%

Brand	Awareness	Used Past 3 Months	Favorite Brand
Crosse & Blackwell	7%	1%	0%
Gourmet Gardens	5%	1%	0%
Heinz	5%	0%	0%
Madagascar bourbon	5%	1%	0%
Lee Kum Kee	3%	0%	0%
McCormick	3%	1%	0%
Jomu	1%	0%	1%
Onga	1%	0%	1%

Qn. Which brands of food flavoring agents are you aware of?;
Qn. Which of the following brands of food flavoring agents have you used in the past three months?
Qn. Which one brand of food flavoring agents used in the past three months is your favorite?

Sample n150

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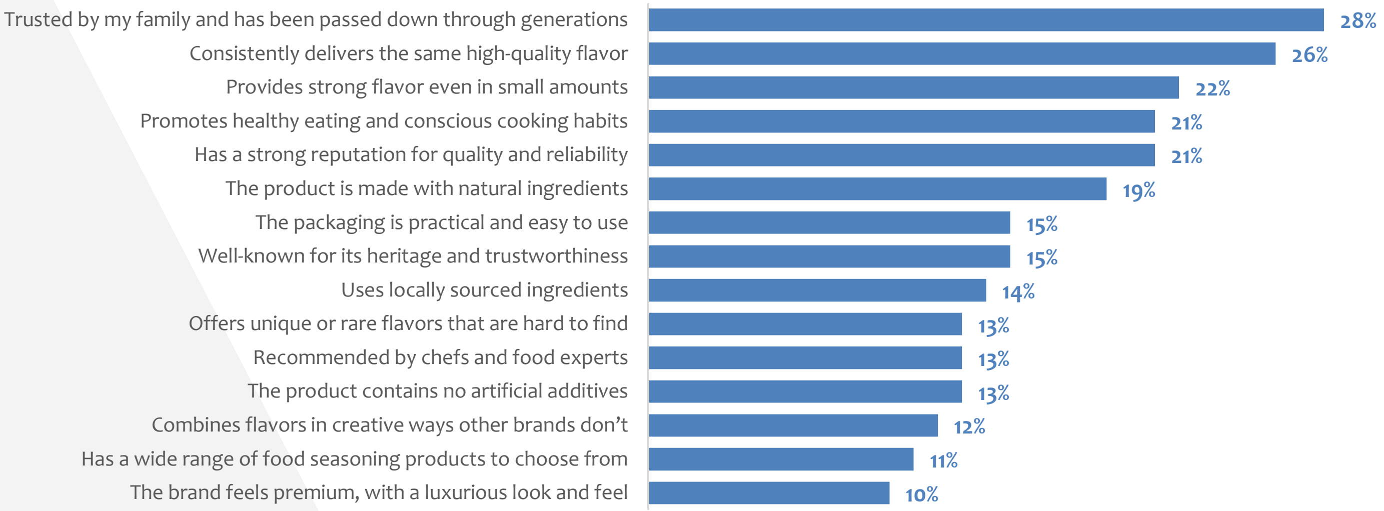
Key Reasons for Favorite Brands – Overall (Favorite Brands)

Consumer preferences for food flavoring agents highlight trust and quality as crucial factors. 28% favor brands passed down through generations, while 26% appreciate consistent high-quality flavor. Health consciousness is significant, with 21% valuing brands that promote healthy cooking habits. Natural ingredients and practical packaging attract 19% and 15%, respectively. Sustainability matters, as 14% prefer locally sourced ingredients, and 13% seek unique flavors. Recommendations from chefs and the absence of artificial additives influence choices as well. These insights reveal a complex landscape where ***tradition, quality, health, and innovation*** shape consumer loyalty in the food flavoring market.

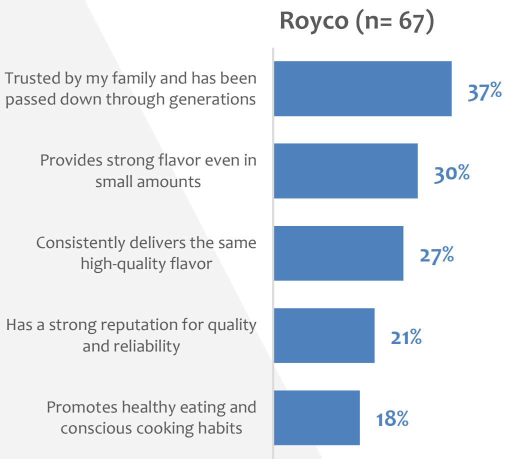


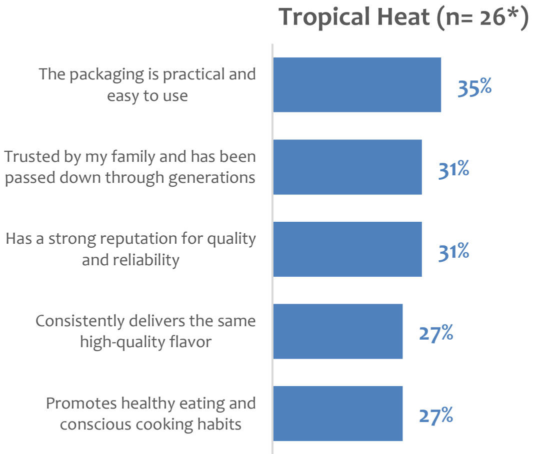
Qn. Why is … your favorite brand of food flavoring agent

Sample n150

Key Reasons for Favorite Brands – Key Top 2 Favorite brands

Consumer preferences for top 2 favorite brands (Royco and Tropical Heat) reveal distinct factors influencing brand loyalty. For Royco, 37% appreciate its generational trust, while 30% value its strong flavor profile. Tropical Heat's appeal lies in practical packaging (35%) and strong reputation (31%). This indicates that while Royco's heritage resonates strongly, Tropical Heat emphasizes user-friendly packaging and reliability. Understanding such motivations helps brands tailor their marketing strategies to align with consumer values and enhance loyalty in a competitive market.





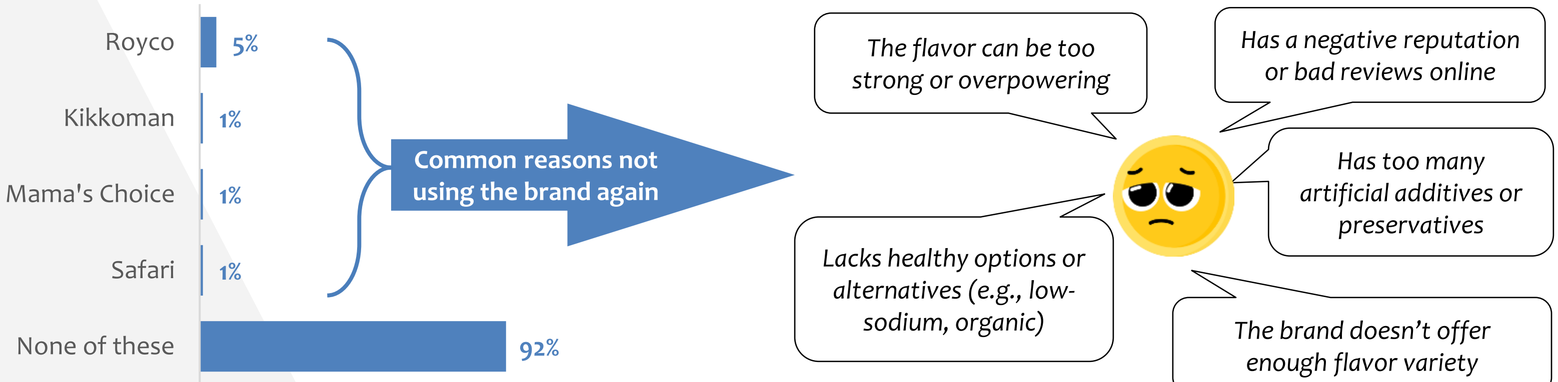
Qn. Why is … your favorite brand of food flavoring agent

Note: n* = lower sample for significant analysis

Food Flavor Enhancer Brand Awareness – Other Brands

In evaluating consumer sentiment towards food flavoring brands, an impressive 92% of respondents indicated they would not eliminate any brands used in the past three months. Royco led in non-repeat usage at 5%, while Kikkoman, Mama's Choice, and Safari each recorded 1%. This preference signals high consumer satisfaction, particularly for Royco's strong market presence. To maintain this favorability, brands must enhance product quality and customer engagement by addressing the demand for healthier options, moderating flavor intensity, and countering negative perceptions through improved reputation management. Additionally, expanding flavor variety and minimizing artificial additives are essential for continued consumer loyalty.

Brands never to be used again



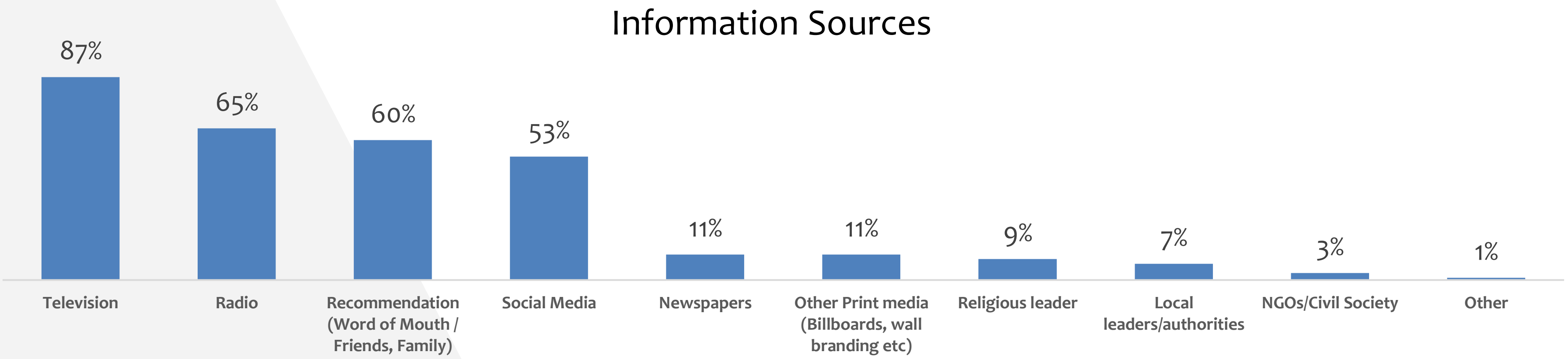
Sample n150

Qn. Which of the brands used in the past three months would you never use again?
Qn. Why will you never use the brand again?

Media Usage

Media Usage- information source (Past 7 Days)

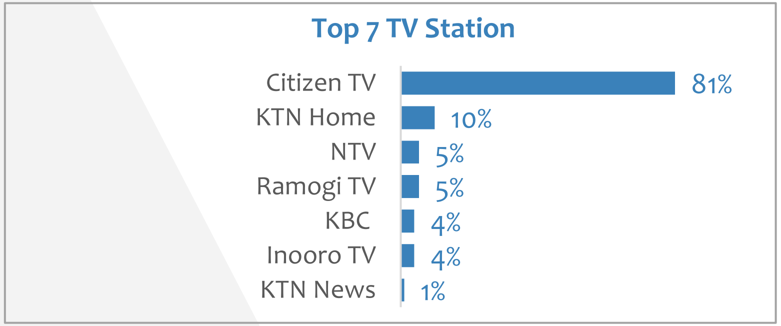
Television (87%) and radio (65%) are the primary sources of information for consumers, highlighting a strong reliance on traditional media. Personal networks, including word of mouth from friends and family, also play a significant role at 60%, indicating a blended approach to information consumption, followed by Social media engagements. To maximize reach, brands should prioritize traditional advertising methods alongside social media strategies. This blended approach can enhance brand visibility and consumer loyalty by fostering community engagement and trust, ensuring that marketing campaigns effectively resonate with target audiences.

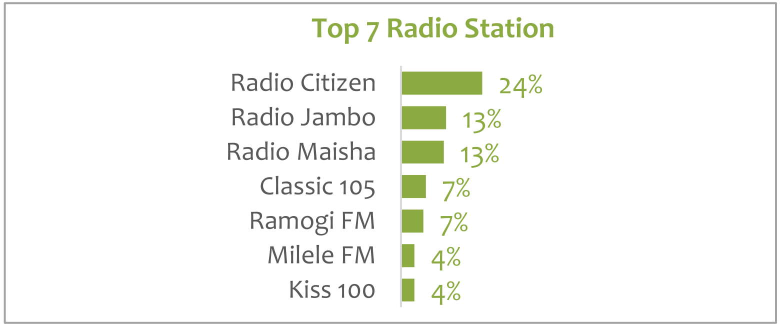


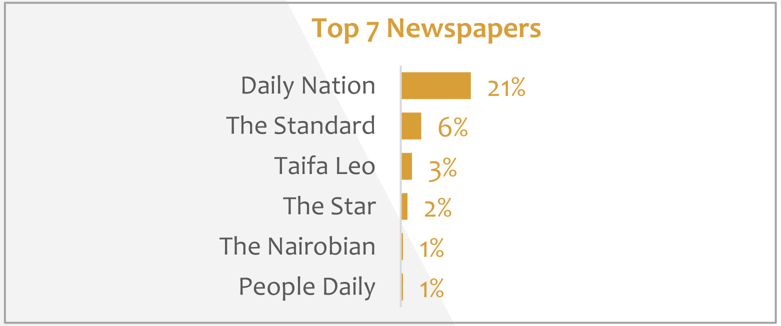
Qn: Which of the following sources of information have you used in the past seven days?

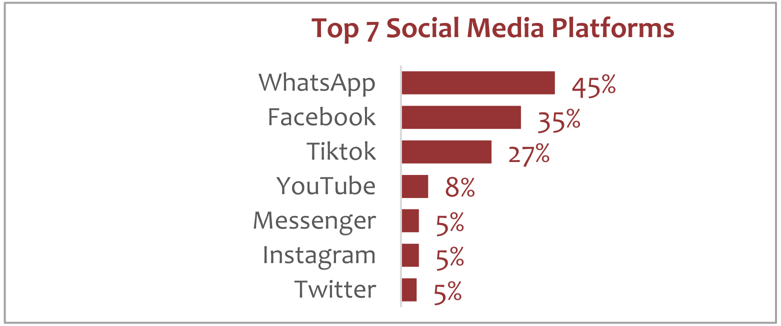
Sample n150

Media Usage









Which is your favorite radio station/ TV station/ newspaper/ social media platform?

Sample n150

Thank you!

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