

Packaged Foods

Next Generation Value Addition – Micronutrient Perspective

Adapting Nutrition to Modern Eating Patterns

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Explosion of Packaged Food Consumption – 25yrs Journey

Rapid growth in processed & ultra-processed foods.
Snacking replacing structured meals.

Growth drivers:

- Urbanization
- Dual-income households
- E-commerce & quick commerce

Food is no longer just food—
it's a product engineered for convenience.

Global Market Size:

- 2000: ~\$1.5 trillion
- 2010: ~\$2.4 trillion
- 2020: ~\$3.8 trillion
- 2025 (est.): ~\$5.2 trillion

3.5x growth in 25 years. Faster growth in emerging markets.



Packaged Foods Are Now Ubiquitous

Early 2000s

Limited to urban upper class

2025

- Deep penetration in urban & rural households
- Even staples (atta, salt, oil) are branded

Household Penetration (% of Households)		
Category	2005	2025
Packaged Snacks	~ 30%	65% ~ 70%
Bakery	~ 35%	~ 70%
Health Drinks	~ 20%	~ 45%

Share of Calories from Packaged/Processed Foods

Global comparison:

- USA: ~60%
- UK: ~55%
- China: ~30%
- India: ~10–15% (fastest growth rate)

India is early-stage but accelerating rapidly

"This shift means nutrition delivery must move from farms to factories."



More Food Less Nutrition

Increased calorie
intake

Decreased
micronutrient density

Rise in:

Hidden hunger (micronutrient deficiency)

Lifestyle diseases

"Nutrition is no longer controlled at the kitchen level—it's controlled at the supply chain level."

Today's Test Result :

- Iron deficiency
- Vitamin D deficiency
- B12 deficiency

Zinc Deficiency
Calcium Deficiency
Vitamin A Deficiency



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It is imperative
We Move to
Next Generation Value Addition !!

**Fortifying what people eat
not what we wish they ate.**

**For consumers Supplements are optional.
Food is universal.
Micronutrient addition may Support to bridge that gap.**



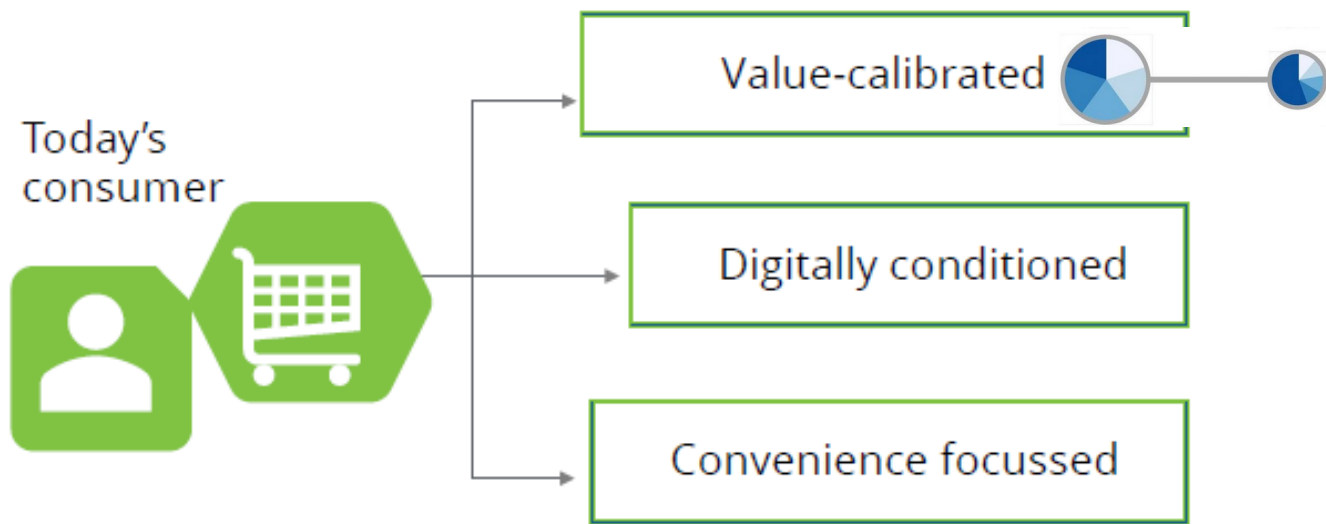
What Consumer Research says – Snippets on Consumer = Nutrition = Spends

Strong tailwinds from domestic demand already exist. Consumers are spending more, as well as aspiring to consume better

Consumer demand is becoming personalised and contextual. **Nutrition/functional categories are growing 2x faster** than the food market (15–20 percent vs ~10 percent)

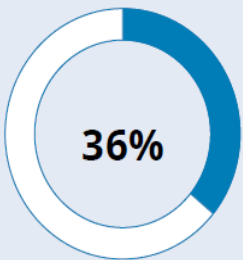


consumers are discovering new products through online channels

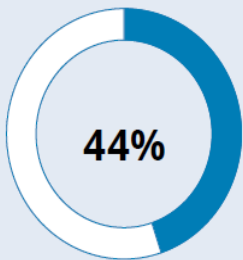


Up to 70 percent of new food launches are now digital-first. New product development will be driven by rapid trend-led innovation and relevance

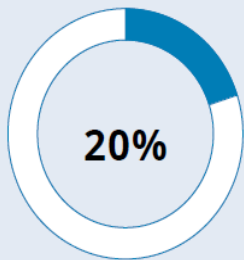
Substituting, reformulating or replacing ingredients to remain relevant in the market while ensuring continuous innovation without diluting the taste and quality



consumers have started buying more healthier options in their usual purchases of packaged food, including, high protein, low sugar content¹⁸



of the increase in packaged food spending since last year is being directed toward purchasing a greater quantity of healthier food items¹⁸



consumers are prioritising quality and health, over price and willing to pay higher for such products¹⁸

% responses on consumer spending behaviour for those who increased spending

		Increased quantity/frequency	Shifted to premium options	Tried new products
	Dairy	46%	22%	12%
	Snacks	25%	17%	26%
	Staples	28%	28%	13%
	RTE	20%	13%	20%
	Health/wellness	43%	25%	19%

Note: Percentages do not add up to 100% for each row, as the remaining % respondents have not increased their spend in that category

Key Pillars of Next-Gen Value Addition

At Hexagon Nutrition, we believe "**Collaboration is the New Innovation.**"
No single entity can tackle modern health challenges .

Our approach is deeply collaborative, fostering an ecosystem where expertise and insights converge.



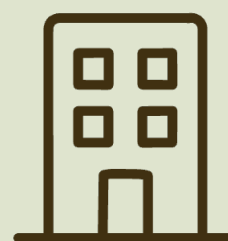
Industry Partners

Partnering with Nutra + FMCG giants and startups, to integrate advanced fortification directly into consumer products.



Research & Expertise

Collaborating with nutritionists, research labs, and educational institutes to leverage cutting-edge science and formulation expertise.



Public Sector Engagement

Working with government organizations and NGOs to drive impactful public health initiatives and broader access to fortified foods.



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Together, we can ensure nutrition is accessible, affordable, and aspirational for all.



HEXAGON NUTRITION®

Nutritionally Yours...

Making India Nutritionally Rich



Clinical
Nutrition



Therapeutic
Nutrition



Micronutrient
Premix





Our Proud Partner

Patented Product.Proven Wellness



Powered by Science, Made with care, Backed by Hexagon Premix

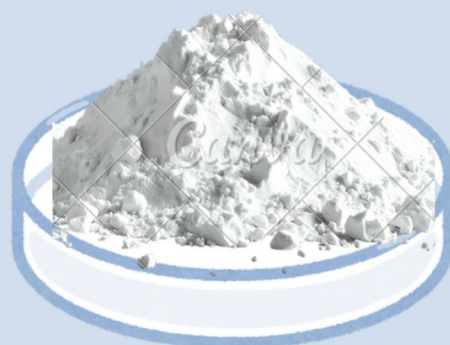
BWP's Products



*High Protein, Fiber, Low GI, Gluten free,
Millet-Pulse based*

**Upcoming- Herbal Chocolate,
Functional Energy Drinks,etc.**

The heart of
BWP formulations-
Hexagon Premix
Essential to the quality,
consistency and performance
of every BWP Product.



Premix Received



Quality Checked



Scientific Formulation



Precision Manufacturing



Rigorous Testing

Latest MOUs at World Food India



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Strategic Partnership Announcement
We're excited to share that Hexagon Nutrition Ltd. has entered into a Technology Transfer and Licensing Agreement with the [National Institute of Food Technology Entrepreneurship and Management, Kundli \(NIFTEM-K\)](#) in presence of [MOFPI Government of India](#) Secretary, Shri A. P. Das Joshi and Joint Secretary Shri Ranjit Singh at World Food India 2025. This collaboration marks a significant milestone in our mission to deliver science-backed, health-focused food innovations. Through this partnership, Hexagon Nutrition will commercialize two advanced high-nutrient Health Bars developed by NIFTEM-K's research team — designed to meet specialized dietary needs and improve nutritional outcomes. ...more

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Next Generation Value Addition

Industry Currently working to
Reduce in Packaged Foods !!

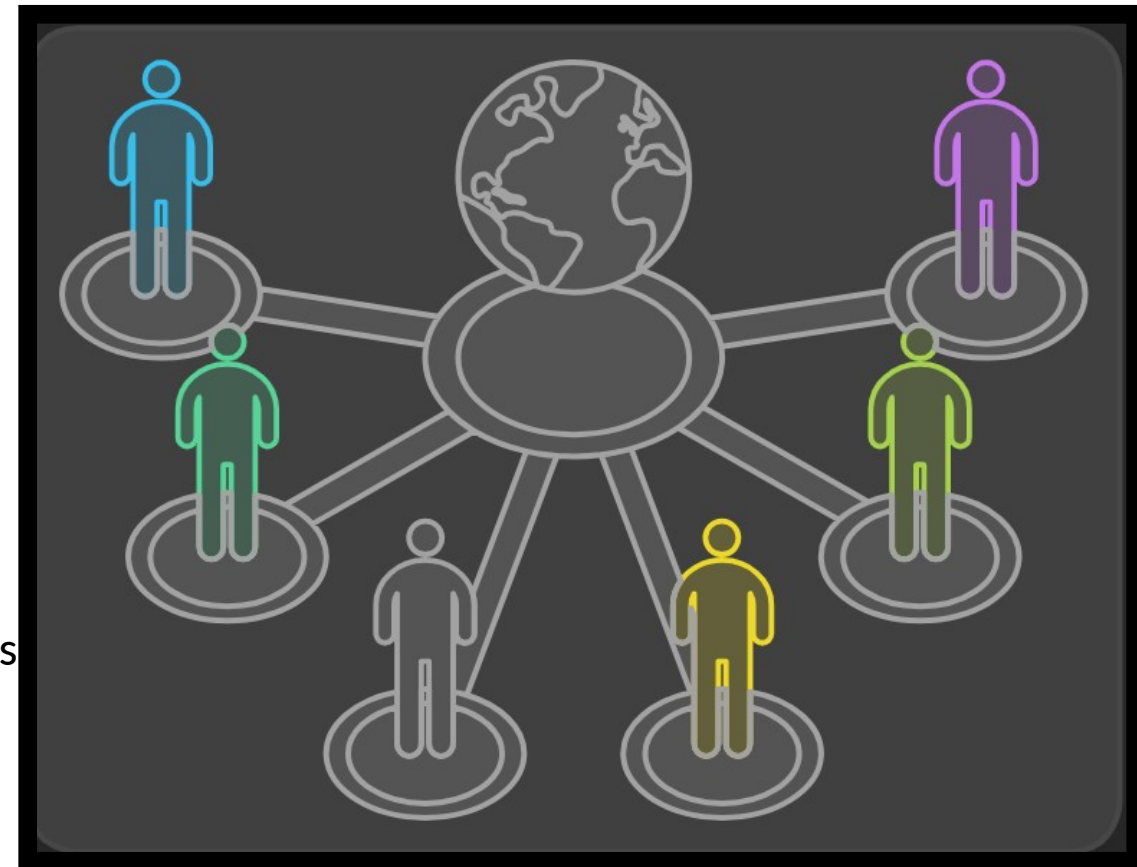
What industry should Increase
To improve the Nutrition in Packaged Foods

HEXAGON Nutrition Solution



H =
Hydration
Micronutrients
to support
Fluid Balance

E =
Essential
Micronutrients
Micronutrients to
Cover Major
deficiency



ON =
Optimal Nutrition
Premix blends to support
All Foods with Active
Nutrition

G =
Gut Health/Fibre
To improve Digestion and
nutrient absorption

X =
eXtra Protein
To Cover Protein
Deficiency

A =
Active Bone & Muscle
Health
Micronutrients, Amino Acids to
support Bone and Muscle Health

Deliverables in Next-Gen Value Addition

01

Develop Fortification Vehicles

Rice, Dal, Sugar, Spices, Snacks, beverages, RTE foods, protein bars

02

Targeted Nutrition

Age-specific • Gender-specific • Lifestyle-specific

03

Smart Delivery Systems

Encapsulation • Controlled release • Stability enhancement

04

High Bioavailability

Better absorption forms • Reduced nutrient loss



Why It Matters for Food Industry

Product differentiation

Premiumization

Health-driven branding / Bar Bell Theory

Regulatory alignment

Why It Matters for Consumers

Easy nutrition (no behavior change needed)

Better health outcomes

Convenience + wellness combined

Barriers to Implementation

Cost of advanced ingredients

Stability issues

Regulatory constraints

Consumer awareness



In a Nutshell

- There is a Rise of “Everyday Foods in Old Formats with New Functional Deliverables”
- Moving ahead packaged food is a convergence of:
 - Food Tech
 - Pharma
 - Data science

“Fortification is no longer about adding nutrients. It’s about redesigning food for the future.”

Hexagon Nutrition is at Forefront to Help you with it !!



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Thanks for your Patient Listening !!

