



For a healthy growing nation

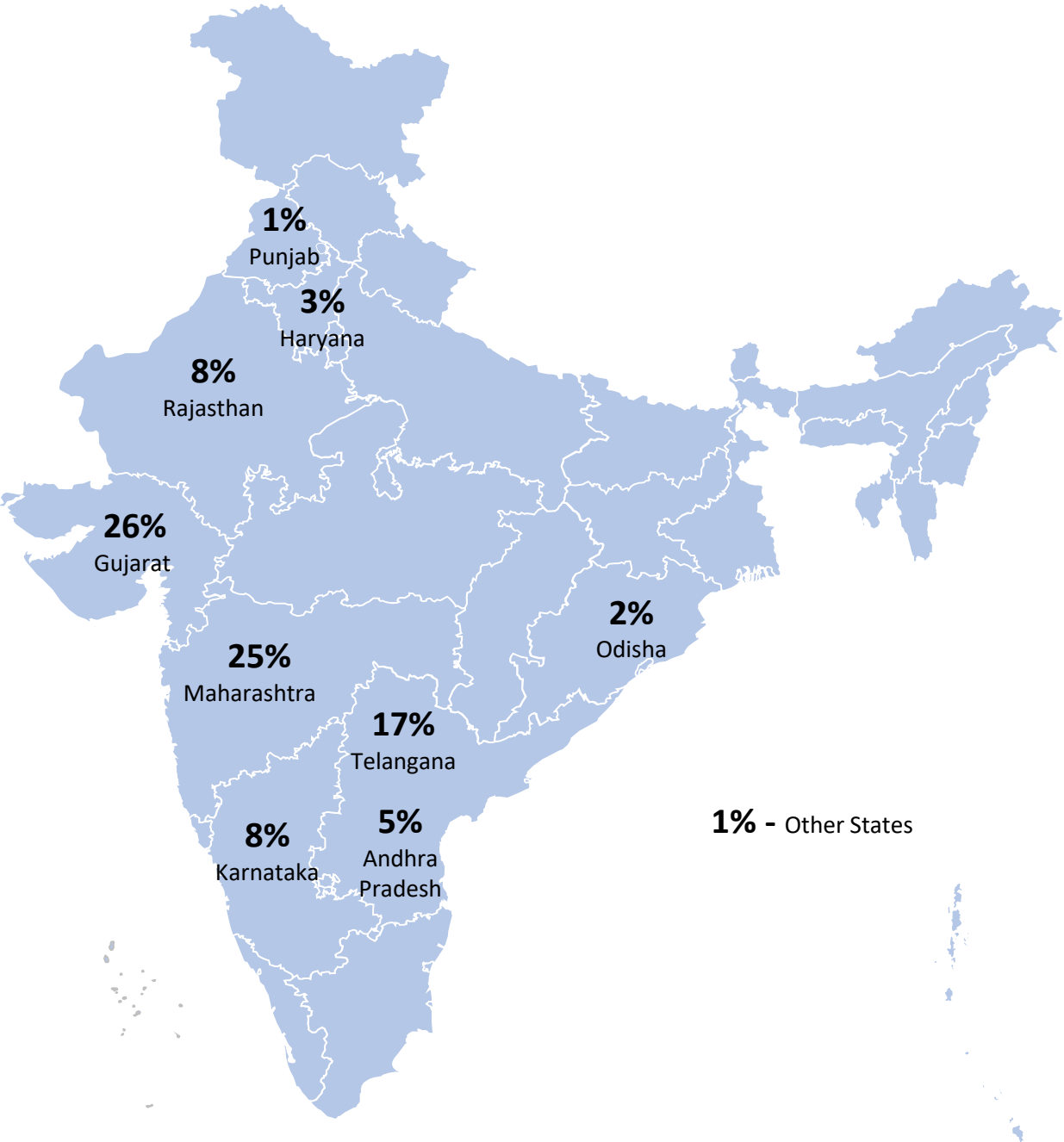


Marketing Insights on Cottonseed oil

State wise Production – Cottonseed Oil

Cottonseed Oil Production from Seed (In Lakh MT)						
States	2019-20	2020-21	2021-22	2022-23	2023-24	%
Gujarat	3.2	2.7	2.8	3.3	3.4	26%
Maharashtra	2.5	3.8	3.1	3.1	3.0	23%
Telangana	2.5	2.2	1.8	2.1	1.9	14%
Rajasthan	1.0	1.2	0.9	1.0	1.0	7%
Karnataka	0.9	0.9	0.7	1.0	0.8	6%
Madhya Pradesh	0.6	0.5	0.5	0.5	0.7	5%
Haryana	0.9	0.7	0.5	0.4	0.6	4%
Andhra Pradesh	0.9	0.6	0.6	0.6	0.3	2%
Odisha	0.2	0.2	0.2	0.3	0.3	2%
Punjab	0.4	0.4	0.2	0.2	0.2	2%
Others	0.2	0.1	0.1	0.1	1.1	9%
Total	13.4	13.1	11.6	12.5	13.1	100%

State wise Production – Cottonseed Oil in %



Household & Retail Scenario



IMRB Household	Volume % Contribution			HH% Contribution		
Cottonseed Oil	MAT Mar'22	MAT Mar'23	MAT Mar'24	MAT Mar'22	MAT Mar'23	MAT Mar'24
All India	100	100	100	100	100	100
Gujarat	89.4	84.4	84.1	79.8	79.9	80.2
Maharashtra	9.7	15.2	15.3	12.8	16.5	15.3
Rajasthan	0.2	0.1	0.1	1.1	0.6	0.2

Nielsen Retail	Volume % Contribution			RP% Contribution		
Cottonseed Oil	MAT Mar'22	MAT Mar'23	MAT Mar'24	MAT Mar'22	MAT Mar'23	MAT Mar'24
All India	100	100	100	100	100	100
Gujarat	83.3	88.4	86.5	69.7	78.5	80.9
Karnataka	2.8	0.5	0.4	4.2	3.1	1.8
Maharashtra	10.9	8.9	10.9	9.4	9.6	7.9

Nielsen Retail Index

Nielsen Retail Index	Volume Contribution %		
	MAT Mar'22	MAT Mar'23	MAT Mar'24
Cottonseed Oil			
All India U+R	100	100	100
All India Urban	74	75	78
All India Rural	26	25	22
Gujarat U+R	83	88	86
Gujarat Urban	63	69	68
Gujarat Rural	20	19	18
Maharashtra U+R	11	9	11
Maharashtra Urban	7	5	8
Maharashtra Rural	4	4	3
Karnataka U+R	3	1	0.4
Karnataka Urban	2	0.2	0.3
Karnataka Rural	0.7	0.3	0.2

Brands Popular in Maharashtra:

Murali Cottonseed
Sanjay Cottonseed
Kirti Gold Cottonseed
Chakde Cottonseed
Garud Cottonseed
Tirupati Cottonseed

Who is our Cottonseed Consumers :IMRB



IMRB Cottonseed	Volume Share Contribution %		
	MAT Mar'22	MAT Mar'23	MAT Mar'24
Cottonseed Oil	100	100	100
Packed	71	68	72
Loose	29	32	28

All India U+R	Cottonseed Oil IMRB HH %		
	MAT Mar'22	MAT Mar'23	MAT Mar'24
Total	14909	14011	14217
SEC: A & B	63.0%	62.5%	61.5%
SEC: C,D & E	37.0%	37.5%	38.5%
Urban Total	47.0%	45.4%	46.8%
Rural Total	53.0%	54.6%	53.2%



- Healthy conversion from loose to packed
- Target group is SEC A/B
- Rural should be focused

Buyer Demographics – Cottonseed Ref 0-15L

Gujarat U+R

MAT Mar'24

Gujarat U+R_MAT Mar'24	Cottonseed Ref	Fortune Plus Cottonlite	Tirupati Cottonseed	Rani Cottonseed	Vimal Cottonseed	Gulab Cottonseed
HH (In 000s)	11405	971	7798	2120	1648	1852
SEC A	30%	40%	29%	25%	24%	39%
SEC B	31%	32%	30%	26%	25%	31%
SEC C	21%	20%	23%	23%	24%	15%
SEC D/E	18%	9%	18%	26%	27%	15%
TCL 40 L+	28%	52%	31%	4%	19%	58%
TCL 10-40 L	4%	0%	0%	22%	0%	9%
TCL 05-10 L	1%	1%	0%	4%	0%	1%
TCL 01-05 L	4%	6%	3%	2%	0%	15%
TCL <= 01 L	10%	5%	10%	4%	3%	1%
VCL <=2000	16%	6%	19%	12%	16%	0%
VCL 2001-5000	23%	17%	24%	32%	47%	10%
VCL >5000	13%	14%	13%	20%	14%	6%
Less consumption of oil	4%	3%	4%	3%	6%	5%
Less consumption of high carbohydrates food	3%	3%	2%	2%	5%	4%
Vegetarian	56%	56%	51%	68%	59%	66%
Non-vegetarian	32%	31%	36%	22%	31%	16%

Retail Brands Count - Nielsen



States	MAT Mar'22	MAT Mar'23	MAT Mar'24
India	96	93	96
Gujarat	59	63	70
In %	61	68	73
Maharashtra	26	25	23
In %	27	27	24
Karnataka	9	10	5
In %	9	11	5

15 Brands Constitutes 91% of the Volume share while 5 brands contribute 68% of the volume sales for PAN India



Thank You !!