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A Study on Market Share Analysis of Select Food Products: Identifying Key Drivers and Barriers to Growth

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Abstract: The Indian food industry boasts a rich tapestry of flavours woven from staple ingredients like Atta, rava, and maida, embodying distinct characteristics and culinary traditions. Rava, or sooji, stands out with its versatile nature, seamlessly transitioning from sweet delicacies like rava kesari to savoury dishes like rava upma. While regional players dominate their market share, national brands are making strides, offering convenience without compromising quality. Maida is the refined wheat flour backbone of various Indian breads. It is renowned for its smooth texture and ability to produce fluffy rotis and crispy samosas. With significant market share, national brands compete fiercely, focusing on affordability, fortification, and brand loyalty to sway consumers. In contrast, Atta, or whole wheat flour, gains momentum driven by health consciousness, retaining wheat's nutritious goodness and robust flavour. Its market share is rising, spurred by interest in healthier lifestyles. Brands emphasizing nutritional benefits and offering diverse options, such as organic or stone-ground Atta, resonate well with health-conscious consumers. The result indicates that Aachi Rava, Naga Maida, and Anil Atta are the leading brands in their respective segments.

Keywords: Market Share Analysis; Advertisement Awareness; Rava, Maida and Atta; Market Dynamics; Affordability and Fortification; Barriers to Growth; Select Food Products; Identifying Key Drivers.

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1. Introduction

The global food industry is a dynamic and ever-evolving landscape driven by consumer preferences, economic factors, and technological advancements. Within this vast ecosystem, specific food products significantly sway consumer purchasing decisions. Understanding the market share of these products is crucial for various stakeholders, from industry giants to emerging startups.

India's food industry is a cornerstone of its cultural heritage, economic prosperity, and nutritional sustenance. With a diverse culinary landscape, rich agricultural heritage, and a burgeoning market, the Indian food industry is a dynamic blend of tradition and modernity. This article explores the multifaceted dimensions of the food industry in India, encompassing agriculture, processing, retail, and culinary traditions.

At the heart of India's food industry lies its robust agricultural sector. With a vast arable land and diverse climatic conditions, India is one of the world's leading producers of staple crops such as rice, wheat, pulses, and vegetables. Traditional farming practices coexist with modern technologies, contributing to a diverse agricultural output. Smallholder farmers play a significant role, although challenges such as fragmented land holdings and access to credit persist. Government initiatives like the Green Revolution and recent agricultural reforms aim to enhance productivity and farmer incomes, ensuring food security for the nation.

The food processing sector in India is witnessing rapid growth, driven by urbanization, changing consumer preferences, and increasing disposable incomes. From dairy products to packaged snacks, the processing industry adds value to agricultural produce, extends shelf life, and enhances convenience. Major players in this sector leverage innovation and technology to meet evolving consumer demands while adhering to quality and safety standards. Additionally, the rise of startups and food tech companies fosters innovation in product development, packaging, and distribution, further fueling the sector's expansion.

India's retail landscape is transforming, with modern formats like supermarkets, hypermarkets, and online platforms gaining prominence alongside traditional Kirana stores. The evolving retail ecosystem offers consumers various choices, convenience, and personalized experiences. E-commerce platforms have democratized access to diverse food products, enabling producers from remote regions to reach national and global markets. Furthermore, the emergence of food delivery services has revolutionized how Indians dine, offering convenience and variety at the click of a button.

India's culinary diversity is unparalleled, reflecting its cultural tapestry and regional nuances. Each region boasts a distinct culinary heritage with unique ingredients, cooking techniques, and flavours. From the spicy curries of the south to the hearty kebabs of the north, Indian cuisine is celebrated worldwide for its complexity and depth. Street food culture thrives in bustling cities, offering an eclectic mix of savoury snacks, sweets, and beverages that tantalize the taste buds. Moreover, farm-to-table dining is gaining traction as consumers prioritize freshness, sustainability, and authenticity in their culinary experiences. Rising disposable incomes and urbanization increase demand for processed and packaged foods. Government initiatives promoting food processing and infrastructure development Growing popularity of online food delivery and e-commerce platforms.

The Indian food industry is a vibrant tapestry woven from the rich flavours and diverse staples that define regional cuisines. Three of these staples reign supreme: rava, maida, and Atta. Understanding their market share and significance goes beyond mere numbers; it's a peek into the soul of Indian cooking.

Rava, or sooji, is the coarse-grained flour from grinding durum wheat. This golden-hued flour is a jack-of-all-trades in Indian kitchens, starring in sweet and savoury dishes. Its versatility is unmatched, from the melt-in-your-mouth delicacy of rava kesari to the comforting warmth of rava upma. The market share of rava is likely dominated by regional players with strong brand recognition catering to specific preferences. However, national brands also make inroads, offering convenience and consistent quality.

Maida, or refined wheat flour, forms the backbone of countless Indian breads like rotis, puris, and naan. Its smooth texture and ability to rise beautifully make it ideal for creating fluffy parathas and crispy samosas. The market share of Maida is likely significant, with established national brands vying for dominance. Faktoren, like affordability, brand loyalty, and fortification with essential vitamins and minerals, will influence consumer choices.

Atta, also known as whole wheat flour, is gaining traction as health consciousness takes centre stage. Unlike Maida, which is stripped of its bran and germ, Atta retains all the goodness of the wheat kernel. This translates to higher fibre content and a more robust flavour profile. Atta's market share is expected to rise, driven by a growing interest in healthy living. Brands that emphasize Atta's nutritional benefits and offer various options, like organic or stone-ground Atta, are likely to find favour with consumers.

1.1. Market Dynamics

The Indian market for these staples is unique. Regional preferences play a strong role, with local mills catering to specific tastes and textures. However, national brands are making inroads, leveraging economies of scale and consistent quality. Additionally, the rise of online grocery shopping offers new avenues for niche players and specialty flours.

Intrinsic aspects like taste, freshness, and nutritional value remain key drivers. Studies by Venkateswaran et al., [8] highlight the evolving nature of customer expectations, with a growing emphasis on health and sustainability. Price-to-quality ratio and perceived value for money are important considerations. Food presentation and visual appeal significantly influence satisfaction. Customer satisfaction with food can be influenced by emotional factors. Venkateswaran et al., [8] discuss the importance of understanding customer preferences for novel food products, like those incorporating superfoods (e.g., spirulina cookies).

The market's future for rava, maida, and Atta will likely be a delicate dance between tradition and innovation. Consumers will continue to seek the familiar comfort of these staples but with a growing focus on health and convenience. Brands catering to this evolving demand, offering various options while preserving the essence of Indian cuisine, will be well-positioned to capture a larger market share.

2. Review of Literature

A report by Mordor Intelligence [24] examines the competitive landscape of the Indian wheat flour market, analyzing market share, key players, and pricing strategies. This information is valuable for comprehending the dynamics affecting rava, maida, and atta producers. Sharma et al. [10] investigate the link between whole wheat flour consumption and gut microbiota composition. Kim et al. [23] highlight the effectiveness of personalization strategies in fostering customer loyalty. Studies by Hüttel et al. [22] explore the growing adoption of online grocery shopping platforms. This trend offers convenience and wider product availability, potentially influencing buying habits [9].

Mehta et al. [6] analyze the growing interest in healthy food options among Indian consumers. This research sheds light on the potential rise in demand for Atta over refined flours like maida. Research by Jin et al. [21] examines the popularity of food delivery services and meal kits. These services cater to busy lifestyles by providing convenient and pre-portioned meals.

Xu et al. [18] explore advancements in milling technologies that improve flour quality, efficiency, and safety. Understanding these advancements is essential for analyzing their impact on the production processes of rava, maida, and Atta. Kumar et al. [15] examine the regional disparities in staple food consumption across India. This research highlights the importance of considering regional preferences when analyzing the consumption patterns of rava, maida, and Atta [7].

Studies by Batho et al., [20] explore the potential of personalized nutrition approaches. This involves tailoring food recommendations based on individual health data and preferences. Singh et al. [3] investigate the impact of climate change and resource limitations on wheat cultivation in India. This research is crucial for understanding how these factors might influence rava, maida, and Atta production and availability.

Tomar et al. [16] explore the potential of fortifying wheat flour with essential vitamins and minerals to address micronutrient deficiencies in India. This research is relevant to the growing market for fortified atta products. Studies by Iqbal et al. [1] highlight the superior nutritional profile of Atta compared to Maida, with higher fiber content and essential vitamins. Research by Verghese et al. [17] explores the changing food habits in urban India, with a rise in consumption of packaged and ready-to-eat products. This trend might influence the demand for pre-processed rava, maida, and Atta variants. Research by Verghese et al. [17] explores the impact of urbanization and globalization on food consumption patterns. Western dietary patterns tend to influence urban areas, leading to increased consumption of processed foods. Studies by Al-Bakheet et al. [2] highlight the importance of considering cultural and religious values when analyzing food consumption. Specific dietary restrictions and preferences play a significant role in regional consumption patterns.

Kumar et al. [14] explore the growing market for fortified Atta products enriched with additional vitamins and minerals. However, challenges remain regarding shelf life and baking properties compared to refined flours. Yadav et al. [5] compare the glycemic index of various flours commonly consumed in India. This research is crucial for understanding the suitability of rava and Atta for diabetic diets compared to maida. Bruhn et al. [4] emphasize the importance of managing the customer experience across all touchpoints.

Studies by Khan et al. [19] highlight the versatility of rava, demonstrating its use in a wide range of dishes like upma, idli, and savory snacks. Research by Joshi and Deshpande [13] explores the nutritional benefits of rava, emphasizing its good source of protein and carbohydrates. However, further research is needed to understand the glycemic index of rava and its suitability for diabetic diets.

Studies by Banerjee et al. [11] raise concerns about the potential health implications of excessive Maida consumption. The refining process removes bran and germ, reducing fiber content and potentially impacting blood sugar levels. Chaudhary et al. [12] research explores the growing consumer interest in healthier alternatives to Maida, such as whole wheat Atta.

3. Research Methodology

3.1. Objectives

- To find out the sources of information to create awareness of Rava, Maida, and Atta.
- To find out the market share of RMA in Dindigul.

3.2. Research design

The research used descriptive Research design. This study describes Naga's Rava, Maida, Atta & companies for Naga. The primary data is collected through a structured questionnaire from 60 retailers. The researcher used a convenience sampling method.

4. Analysis and Findings

Table 1: Income of the retail respondents

Monthly Income (in rupees)	**Frequency**	**Percent**
Below 20000	17	28.3
20000-40000	12	20
40000-60000	7	11.6
60000-80000	18	30
80000 & above	10	16.7
Total	**60**	**100.0**

Source: Primary data

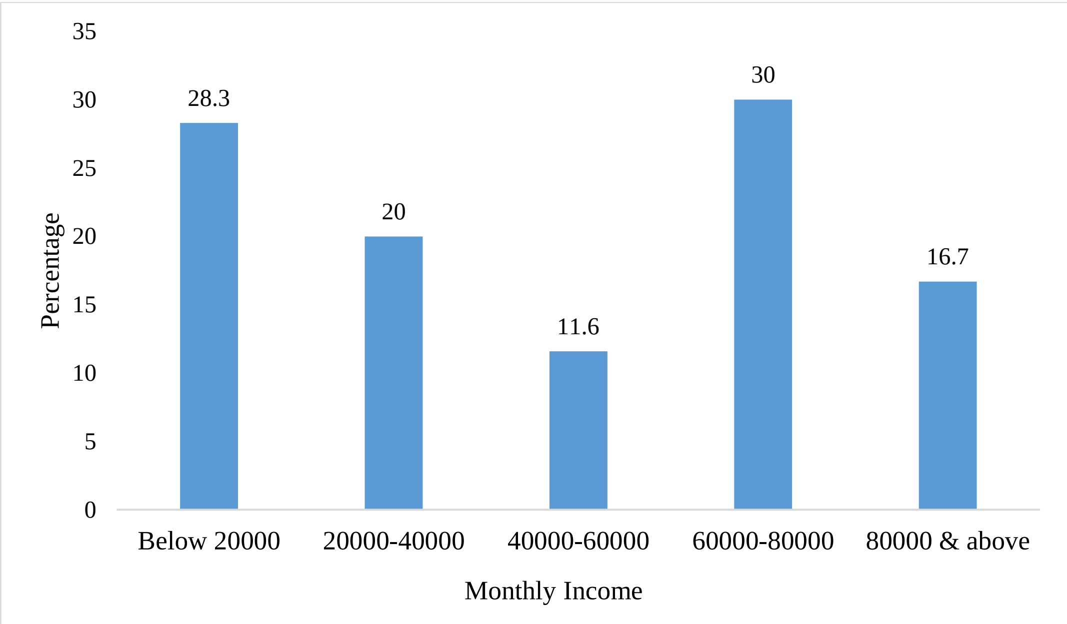

Figure 1: The monthly Income of the retail respondents

From the above, 30% of the respondents are 60000-80000. 28.3% of the respondents are below 20000.20% of the respondents are 20000-40000. 16.7% of the respondents are 80000 & above 11.6% of the respondents are 40000-60000 (Table 1 and Figure 1).

Table 2: Your Opinion Towards Branded RMA

Opinion towards branded RMA	**Frequency**	**Percent**
Quality	20	33.3
Price	10	16.7
Availability	10	16.7
Taste	15	25.0
Product design	5	8.3
Total	60	100.0

Source: Primary data

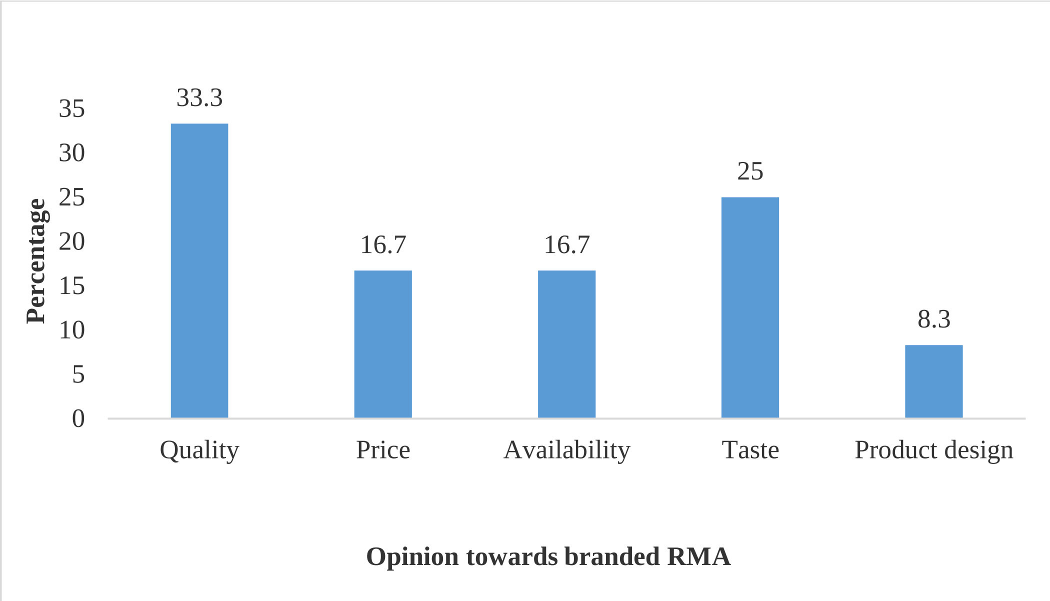

Figure 2: The Opinion towards branded RMA

From the above, 33.3% of the respondents said they prefer unbranded RMA for quality, and 25% said unbranded RMA for taste. 16.7% of the respondents said they prefer unbranded RMA for price, and 16.7% said unbranded RMA for availability.8.3% said they prefer unbranded RMA for product design (Table 2 and Figure 2).

Table 3: Your Opinion Towards Unbranded RMA

Your opinion towards unbranded RMA	Frequency	Percent
Quality	8	13.3
Price	20	33.3
Availability	12	20.0
Taste	10	16.7
Product design	10	16.7
Total	60	100.0

Source: Primary data

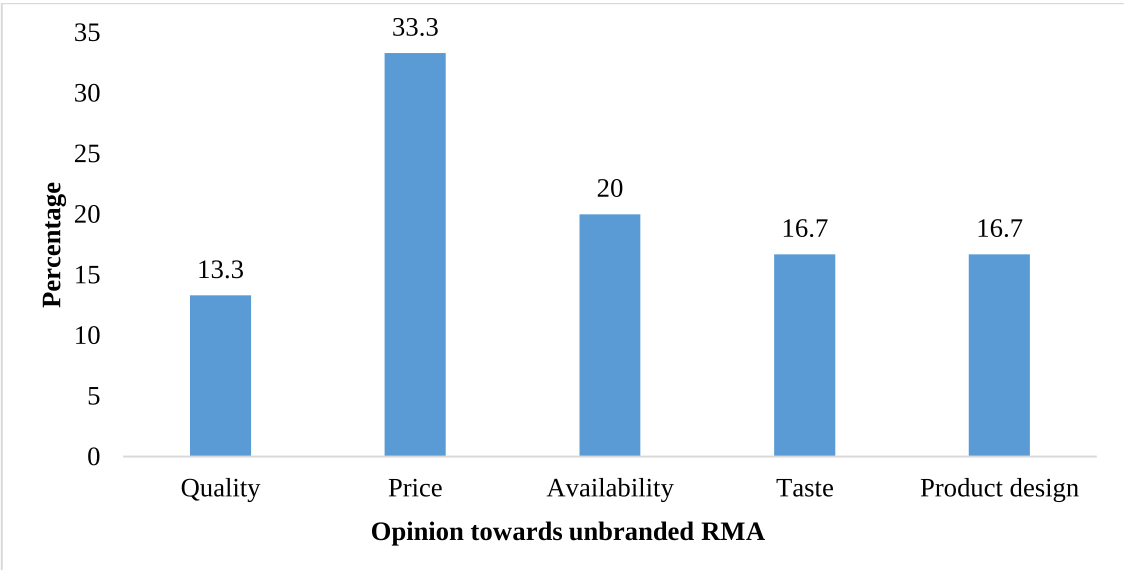

Figure 3: The Opinion towards unbranded RMA

From the above, 33.3% of the respondents said that they prefer unbranded RMA for price, 20% of the respondents said that they prefer unbranded RMA for availability.16.7%of the respondents said that they prefer unbranded RMA for taste.16.7%of the respondents said that they prefer unbranded RMA for product design.13.3%of the respondents said that they prefer unbranded RMA for quality (Table 3 and Figure 3).

Table 4: Belief towards advertisements influence the sales of RMA

Do you believe advertisements influence the sales of RMA	Frequency	Percent
Yes	15	25.0
No	45	75.0
Total	60	100.0

Source: Primary data

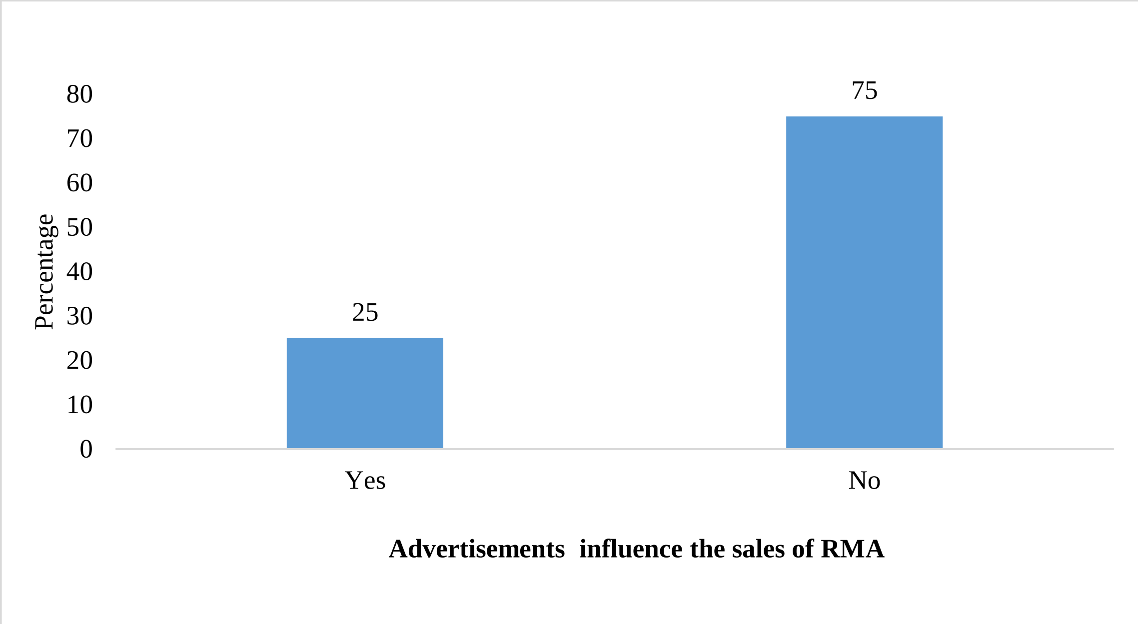

Figure 4: The Advertisements influence the sales of RMA

Table 4 above, 23.3% of the respondents believe advertisements influence the sales of RMA.76.7% do not think advertisements influence the sales of RMA (Figure 4).

Table 5: Which factor influences the increase in the respondents' RMA sales?

Which factor influences the increase in the sales of RMA	Frequency	Percent
Celebrity	4	6.7
Themes	2	3.3
Jingle	1	1.7
Message	2	3.3
Others	6	10.0
No respondents	45	75.0
Total	60	100.0

Source: Primary data

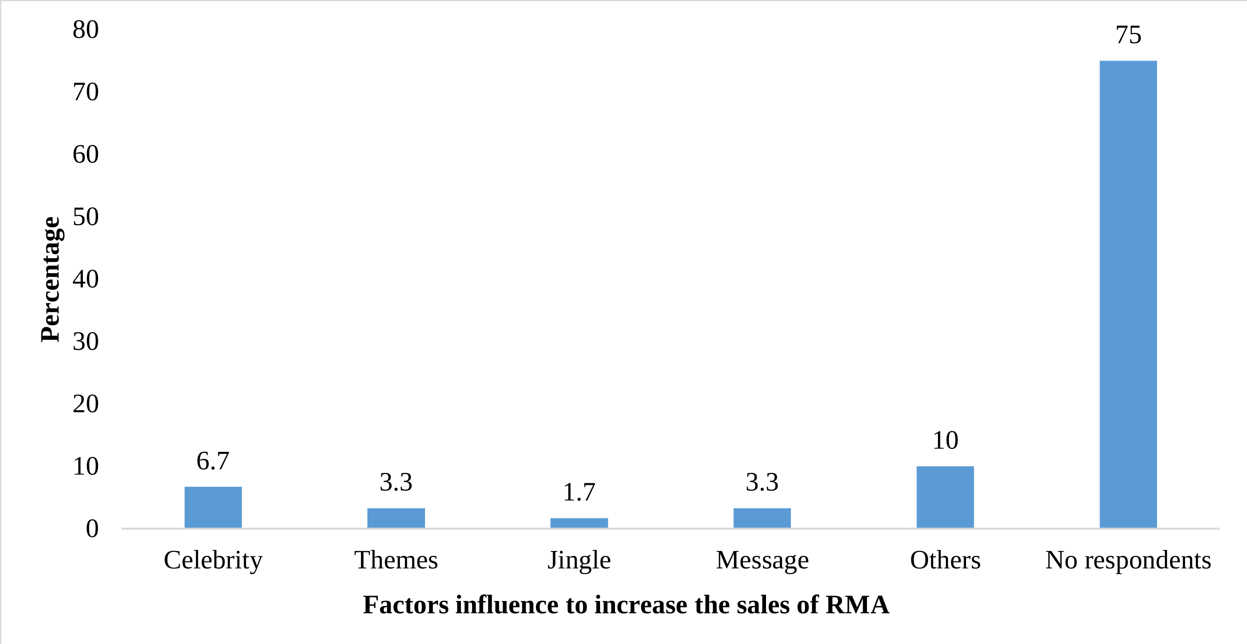

Figure 5: The Factors influencing the increase in the sales of RMA

From the above table 5, 10%of others influence the respondents to increase their sales RMA. Celebrities influence 6.7% of the respondents to increase their sales RMA.3.3%of themes influence the respondents to increase their sales RMA. 3.3%of the respondents are influenced by messages to increase their sales RMA. 1.7%of jingles influence the respondents to increase their sales RMA (Figure 5).

4.1. Market Share Analysis

Table 6: Market Share for Rava Monthly sales details (Aug 2023 to Dec 2023)

Brand name	August	September	October	November	December	Percentage
Anil	100	120	90	100	115	7
Aashirvaad	150	175	140	160	130	9
Annapurna	125	135	120	135	140	9
Aachi	180	200	120	190	160	12
Perrisperry	130	140	160	170	100	10
Gpl	135	190	150	160	145	9
Narrasus	140	160	180	170	165	11
Naga	180	160	150	150	160	11
Svs	90	70	60	50	80	5
Visalakshi	50	40	50	60	80	4
Lion	60	50	50	40	30	3
Cycle	50	60	40	50	40	3
Baby	40	30	50	40	50	3
Rockfort	50	60	40	30	40	3
Camel	10	10	10	10	10	0.6
Vivekananda	25	25	25	25	25	1.71

Source: Primary data

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Table 6 provides the market share for various Rava (semolina) brands in Dindigul from August 2023 to December 2023. Anil, Aashirvaad, and Annapurna each hold 7%, 9%, and 9% of the market share, respectively, making them the top three brands in sales percentage. Aachi, Perrisperry, and Gpl follow closely behind with 12%, 10%, and 9%, respectively, making those significant players in the market as well. Narrasus and Naga capture 11% of the market each, showing strong competition.

Svs holds a smaller share with 5%, followed by Visalakshi, Lion, Cycle, Baby, Rockfort, and Camel, each with 4%, 3%, 3%, 3%, 3%, and 3%, respectively. Vivekananda holds a modest 1.71% of the market share. Camel has the smallest share at 0.6%. The above pie chart shows the market share for the entire branded and unbranded Rava product market share in Dindigul District (Figure 6).

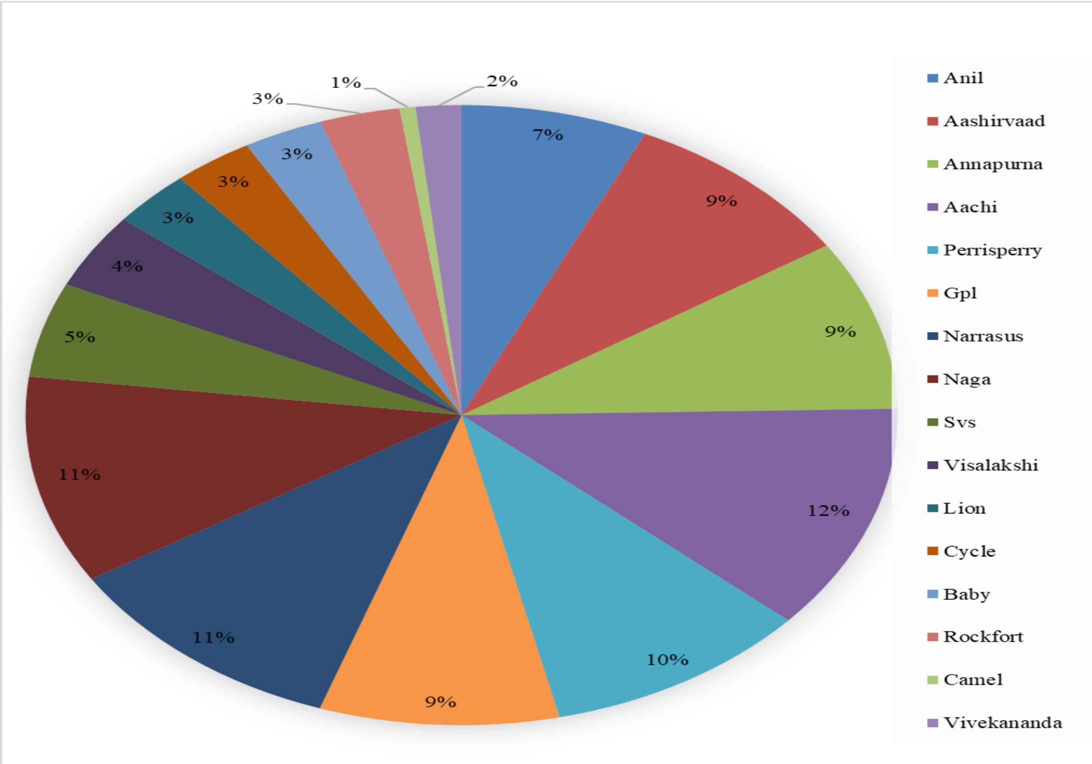

Figure 6: Market share for Rava

The Rava market in Dindigul seems quite diverse, with various brands competing for consumer preference. There's significant competition among several brands, especially those with shares around 9% to 12%. Some brands hold smaller shares, indicating they might be niche players or have a limited presence in the market. The data suggests that consumers in Dindigul have various options for purchasing Rava, with preferences spread across multiple brands.

Table 7: Market share for Maida Monthly sales details (Aug 2023 to Dec 2023)

Brand name	Aug	Sep	Oct	Nov	Dec	percentage
Anil	1000	1300	1400	1600	2000	12
Aashirvaad	1500	1500	1600	1800	1600	14
Annapurna	1600	1700	1900	2000	2200	16
Aachi	1400	1600	1800	1900	2000	12
Perrisperry	1000	1100	1150	1200	1300	10
Gpl	1200	1400	1500	1600	1800	13
Narrasus	1000	1100	1100	1200	1200	10
Naga	2000	2200	2500	2600	2700	21
Svs	80	100	90	100	120	0.80
Visalakshi	90	80	90	100	110	0.80
Lion	100	110	115	125	120	1
Cycle	50	50	60	80	90	0.60
Baby	10	20	30	40	50	0.20
Rockfort	10	20	25	30	30	0.10
Camel	25	25	25	25	25	0.20
Vivekananda	10	10	25	25	25	0.10

Source: Primary data

Table 7 presents the market share for different brands of Maida (refined wheat flour) in Dindigul from August 2023 to December 2023. Naga has the highest market share, with 21%, indicating it's the leading brand for Maida in Dindigul during the specified period.

Annapurna follows closely behind with 16%, making it the second most popular brand for Maida. Aashirvaad and Gpl hold significant shares at 14% and 13%, respectively, suggesting strong competition among these brands for the third and fourth positions.

Anil and Aachi share the same percentage at 12%, indicating equal market presence for both brands. Perrisperry and Narrasus also share the same percentage at 10% each, suggesting a tie for the lower end of the top brands. Lion, Svs, Visalakshi, Cycle, Camel, Vivekananda, Baby, and Rockfort have smaller market shares ranging from 1% to 0.10%.

Like the Rava market, the Maida market in Dindigul appears diverse, with multiple brands vying for consumer preference. Naga emerges as the leader, possibly due to brand reputation, quality, or effective marketing strategies. Annapurna, Aashirvaad, and Gpl compete closely for the second position, indicating a tight race among these brands (Figure 7).

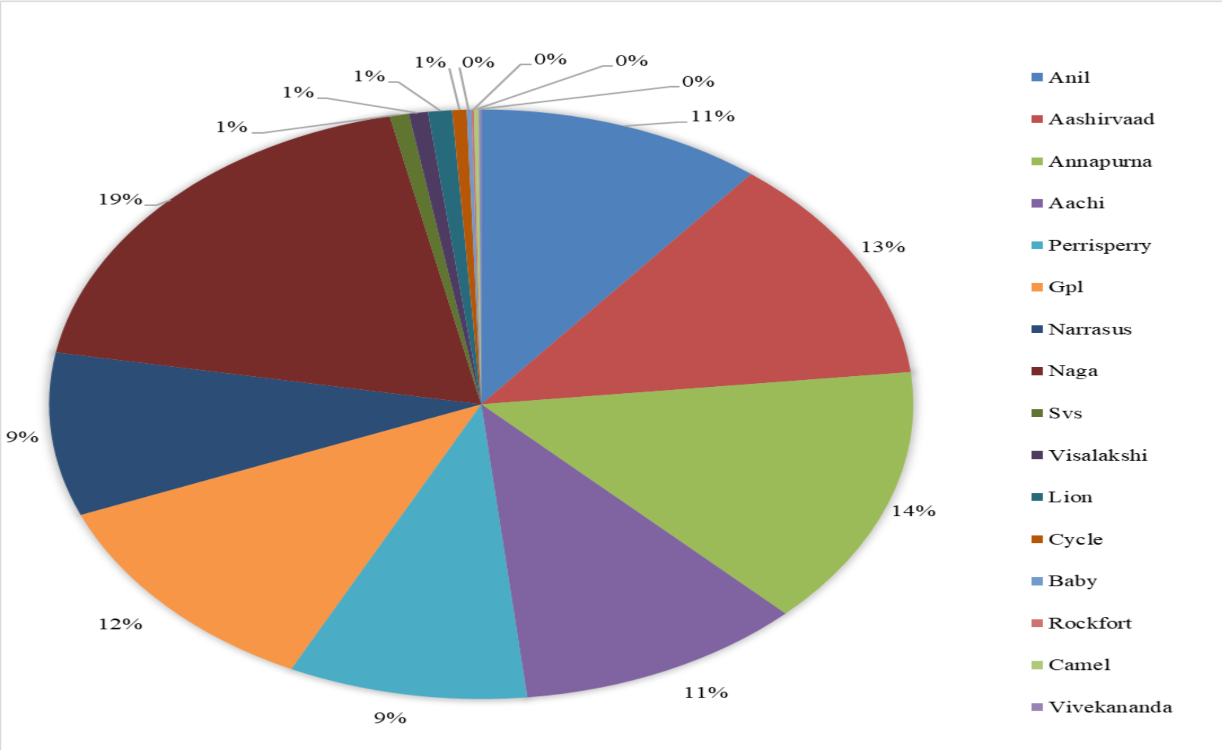

Figure 7: Market share for MAIDA

Despite the dominance of certain brands, there's still room for smaller players in the market, as evidenced by several brands with smaller market shares. Consumer choice in Dindigul seems varied, with different brands catering to different preferences and needs (Figure 8).

Table 8: Market share for Atta Monthly sales details (Aug 2023 to Dec 2023)

Brand name	Aug	Sep	Oct	Nov	Dec	percentage
Anil	200	250	300	350	400	16
Aashirvaad	150	175	150	125	180	8
Annapurna	125	130	180	195	200	9
Aachi	200	210	180	190	200	10
Perrisperry	150	140	160	120	140	9
Gpl	200	250	240	220	200	14
Narrasus	180	160	140	130	150	10

Naga	130	140	150	160	150	9
Svs	25	25	25	50	50	2
Visalakshi	25	25	40	50	50	2
Lion	25	25	50	50	50	3
Cycle	25	25	40	40	50	10
Baby	25	25	50	35	40	2
Rockfort	10	25	25	50	50	2
Camel	10	25	25	25	50	2
Vivekananda	10	10	10	10	10	0.60

Source: *Primary data*

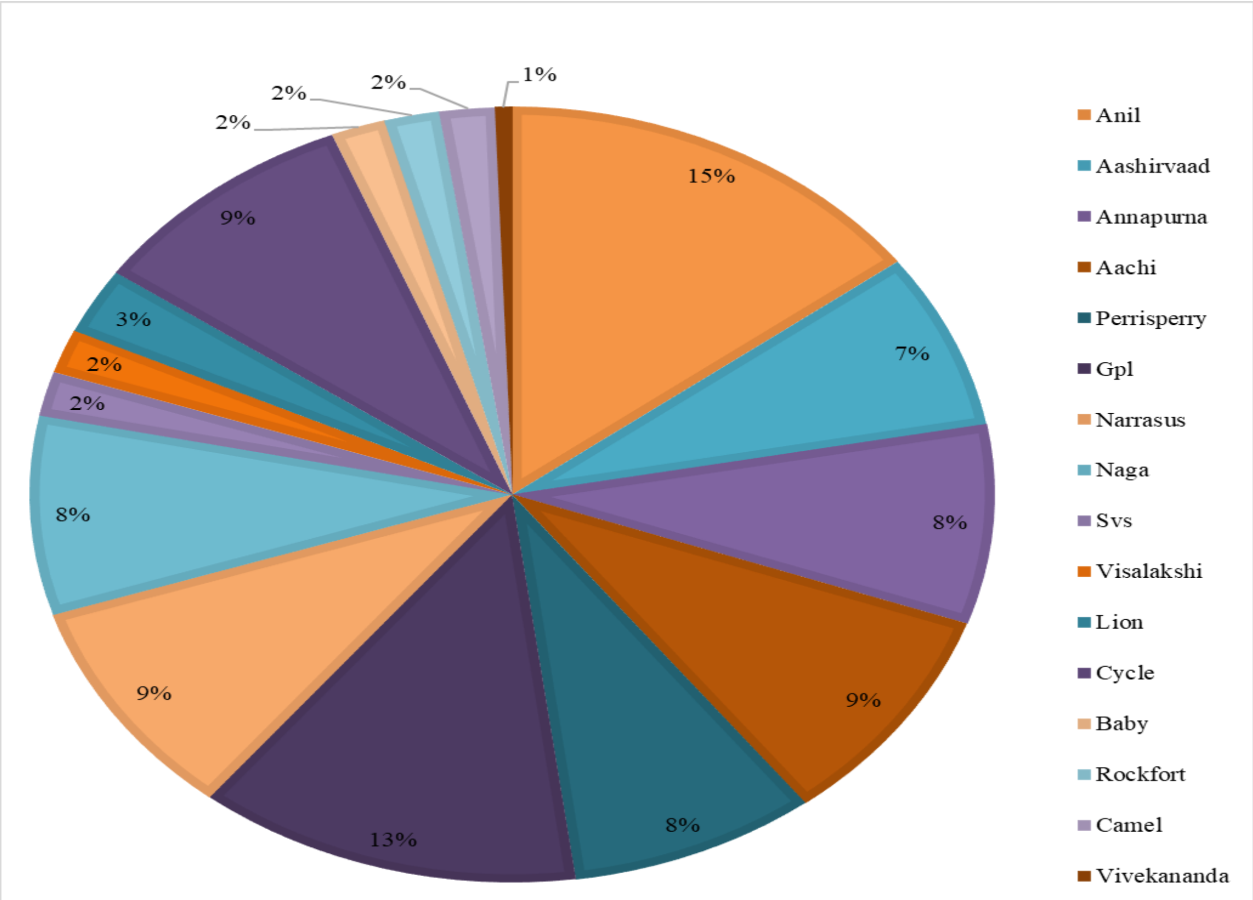

Figure 8: Market share for ATTA

Table 8 provides the market share for different brands of Atta (whole wheat flour) in Dindigul from August 2023 to December 2023. Anil emerges as the leading brand with 16% of the market share for Atta, indicating it's the most preferred brand during the specified period. Gpl follows closely behind with 14%, positioning it as a significant player in the Atta market in Dindigul. Aachi and Cycle share the same percentage at 10%, suggesting equal market presence for both brands.

Annapurna, Perrisperry, Narrasus, and Naga hold 9% of the market share, indicating a competitive landscape among these brands. Lion holds a modest share of 3%, while Svs, Visalakshi, Baby, Rockfort, and Camel each have 2%. Vivekananda has the smallest share at 0.60%.

Anil leads the Atta market, possibly due to brand reputation, product quality, or effective marketing strategies. Gpl, Aachi, and Cycle also hold substantial shares, indicating strong competition among these brands for consumer preference. Annapurna, Perrisperry, Narrasus, and Naga compete closely for market share, suggesting a relatively balanced distribution of consumer choice among these brands.

Smaller players like Lion, Svs, Visalakshi, Baby, Rockfort, Camel, and Vivekananda collectively hold a smaller but still noticeable portion of the market, indicating some diversity in consumer preferences. Overall, the Atta market in Dindigul appears competitive, with multiple brands catering to different segments of consumers based on various factors such as quality, price, and brand perception.

5. Conclusion

In conclusion, the Indian food industry is a dynamic landscape shaped by staple ingredients like Atta, rava, and maida, each playing a vital role in the culinary tapestry of the nation. While regional preferences and traditional practices remain influential, national brands are increasingly making their mark, offering convenience and quality to consumers. The analysis of market share for select food products in Dindigul reveals a dynamic and competitive landscape shaped by various factors, such as brand reputation, product quality, pricing strategies, and consumer preferences, across three key food categories – Rava, Maida, and Atta multiple brands vie for market dominance, each carving out its niche and striving to capture the attention and loyalty of consumers. In the Rava segment, diversity is evident with a wide range of brands catering to different consumer preferences. While some brands like Aachi and Perrisperry claim significant shares, others like Camel and Vivekananda hold smaller portions of the market. This indicates a spectrum of consumer choices, suggesting that factors like taste, texture, and brand loyalty play pivotal roles in purchasing decisions. Similarly, the Maida market reflects a competitive scenario, with brands like Naga leading the pack with substantial shares. However, other brands like Annapurna, Aashirvaad, and Gpl closely follow, indicating a tight race for market dominance. Despite the dominance of certain brands, smaller players still maintain a presence, showcasing the market's openness to diverse offerings and consumer preferences.

Anil emerges as the frontrunner in the Atta category, capturing the largest market share. However, brands like Gpl and Aachi are not far behind, indicating stiff competition in this segment. Smaller players like Lion, SVS, and Visalakshi hold modest shares, highlighting the market's inclusivity and opportunities for established and emerging brands.

The analysis underscores the importance of understanding consumer behavior and preferences in shaping market dynamics. Factors such as quality, pricing, branding, and distribution channels all play crucial roles in determining the success of a brand in Dindigul's food market. As competition intensifies, brands must continuously innovate and adapt to meet evolving consumer demands and stay ahead in this vibrant and competitive market landscape. The market's future for these staples hinges on a delicate balance between preserving tradition and embracing innovation. As health consciousness continues to rise, Atta emerges as a frontrunner, with its inherent nutritional benefits gaining traction among consumers. However, the enduring popularity of rava and maida underscores the importance of versatility and familiarity in Indian cooking. Brands that can navigate this evolving landscape, catering to diverse preferences while upholding the essence of Indian cuisine, are poised to thrive in the ever-changing market dynamics. Ultimately, the journey of Atta, rava, and maida reflects the evolution of ingredients and the enduring love affair between Indian consumers and their food traditions.

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