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# Safest Spices in India

# CHUKDE

By Lifestyle Foods Pvt. Ltd.



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# Research objective & scope of the study

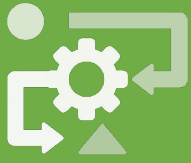


## Research objective

- To find out the Safest Whole Spices in India –
- The consumers perception

## Scope of the study

- Background- Usage of whole spices India
- Market overview of the whole spices in India
- Awareness of spices among general consumers
- Awareness of whole spices (Khade/Sabut masale)
- Use of spice brands
- Use of whole spices brands
- Best brand of whole spices
- Brand satisfaction in terms of taste, purity, authenticity, colour, aroma, etc.
- Perceived safest brand of whole spices in India



# Research methodology



## Survey steps

- A consumer survey have been conducted in multiple cities in India including tier 1, tier 2 and tier 3 cities.
- Based on the requirement, a survey questionnaire have been designed to enquire about Whole Spices – awareness, usage, perception of each brand.
- Selection of consumers was based on the demographic profile of the consumers – age, income, education, occupation, etc.
- To ensure the proper representation, the sample distribution was done across the city. We have followed the representative sampling technique.
- The survey was programmed in Google Forms.
- Quantitative research methodology have been adopted to fulfil the task.
- The research study period was from **August 2023 to September 2023.**

# Executive Summary

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## Safest Spices in India





# Executive Summary

## Preface

The objective of the study was to find the safest whole spices in Indian market and to know the general perception of the public regarding it. To study this we needed to study the spices market in India and get its market overview. We also needed to know the awareness levels about spices in general among consumers in India.

We tried to get an idea about their usage of spices and whole spices. Depending on their usage and brand satisfaction using various criteria, we were able to select the perceived **Safest Whole Spices** from among our list of spices. So, overall, our objective was to enquire about Whole Spices– awareness, usage, perception of each brand.

Selection of consumers was based on the demographic profile of the consumers– age, income, education, occupation, etc. To ensure the proper representation, the sample distribution was done across the city.



# Executive Summary

## Demographic profile of the consumers

A representative sample size of 350 consumers who had been covered from Tier I, Tier II and Tier III cities in India. The largest representation was from Delhi, Lucknow and Gurugram. Of the respondents 58% were male and 42% were female, in accordance that females are the usual purchasers of spices in India.

## Latest trends in Indian spice market

It is seen India is the largest producer and exporter of spices in the world. It has exported nearly \$3.3 billion worth of spices during April-Feb 2023. During 2017-18 till 2022-23, the spices market grew at an annual CAGR of 10.47%. It exports spices to 180 countries in the world. Chilli was the most exported spice from India. The blended spices market is growing fast. It is expected to reach 35% of total organized spices market share. It is growing at twice the rate of straight spices.





# Executive Summary

## Industry Highlights

India is the world's largest spice producer and largest consumer. India produces about 75 of the 109 varieties. The largest spices-producing states in India are Madhya Pradesh, Rajasthan, Gujarat, Andhra Pradesh, Telangana, Karnataka, & others.

## Research findings- Indian Spices

As per our findings, best Top Of Mind (TOM) recall value was for MDH, followed by Catch. Chukde stood behind Everest in his regard. These findings were the same for unaided recall as well, where respondents were able to mention few more brands known to them, like Patanjali, Ashirvaad. However, with aided recall, **Chukde fared top of the list** followed by MDH which showed good recall value.



# Executive Summary

## Research Findings- Whole Spices

In general, the awareness among respondents of whole spices was very good. Here they mentioned brands such as Chukde, Zoff, Catch and Patanjali as brands they were aware about.

## Chukde- Brand Awareness & Usage

We then sought to reconfirm awareness of Chukde brand specifically among the consumers. It turned out 72% of them were well aware of the brand. Their main source of their awareness of the brand was local shops /markets followed by online shopping platforms.

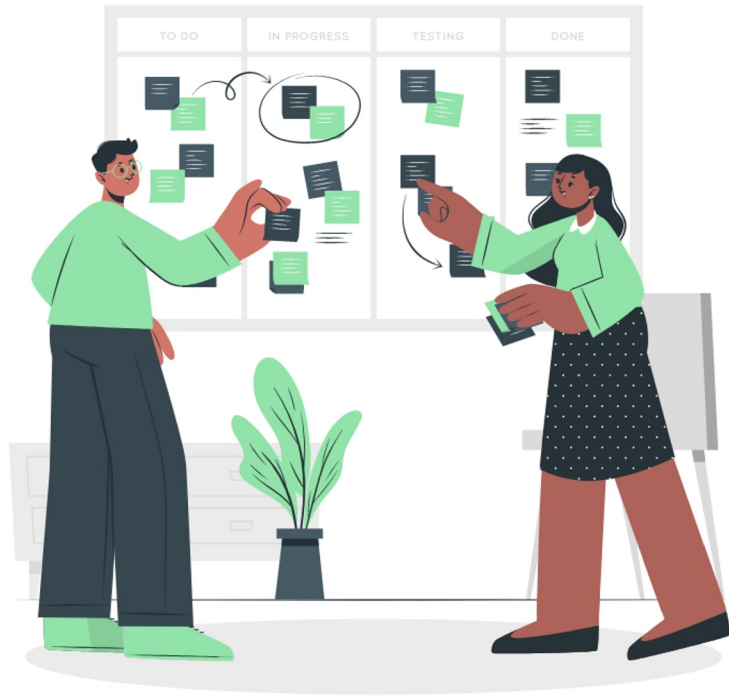
Since our study was to analyse usage of spices and whole spices specifically, we found that the consumers had a good range among spices to choose from. They also showed preference for different brands of spices. When it came to whole spices, the consumers preferred Chukde over other brands. Chukde came out as the most used whole spices brand, followed by Catch and Zoff. Even other brands like Patanjali and MDH had significant preference among the consumers.



# Executive Summary

## Safest Whole Spices in India

- ▶ When consumers asked to pick the **safest whole spices brand**, they mentioned **Chukde** on the top of the list. Chukde scored over the rest by a margin.
- ▶ When consumers asked mentioned reasons behind labeling a whole spices brand as safest attributed to it being 100% natural spices, 27% felt that way about Chukde.
- ▶ Being 100% purity was also a feature most attributed to Chukde brand of whole spices, 31% consumers felt that way.
- ▶ Authenticity was also a critical factor among the respondents. Here also Chukde was rated most authentic brand for whole spices, followed by Catch which was also half-way behind.
- ▶ Chukde was also believed to be the brand most believed to be having a natural color quality. 28% respondents felt this way, much more than other brands. It also was believed to have a natural aroma /fragrance, much more than other brands.
- ▶ A critical finding mentioned by respondents when asked was whether they felt Chukde was a brand which had 100% natural oils preserved in it. Nearly 36% of of them felt that way.
- ▶ Also, most consumers felt Chukde was a brand which was chemical free and bacteria or fungal free.



# Market Overview

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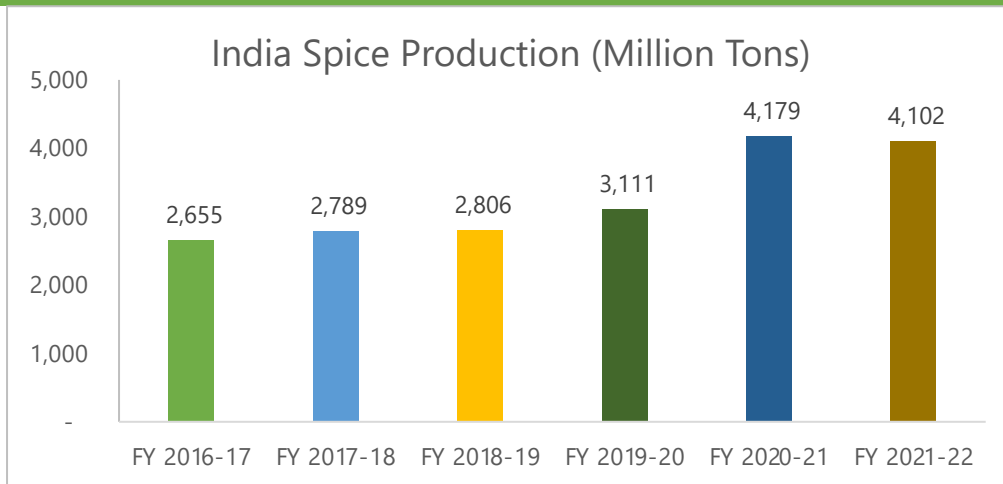
# Indian Spices



# Background: Indian whole spices *conti...*

## Export Trends

- India is the largest exporter of spice and spice items. During April-Feb 2023, the country exported spices worth US\$ 3,332.02 million.
- In February 2023, the exports of spices from India increased by 44.12% to US\$ 379.51 million. In 2021-22, India exported 1.53 million tonnes of spices. From 2017-18 to 2021-22, the total exported quantity from India grew at a CAGR of 10.47%.
- For FY22, total volumes of chilli, cumin, turmeric and ginger exports were 0.55, 0.21, 0.15 and 0.14 million tonnes.
- During 2020-21, the export of chilli, ginger, cardamom (small & large), coriander, turmeric, celery, cumin, fennel, fenugreek, other seeds such as ajwain seed, mustard, aniseed, nutmeg & mace; other spices such as asafoetida, tamarind, etc., expanded both in value and volume as compared to 2019-20.



- The export of value-added products such as spice oils & oleoresins grew both in terms of value and volume; the export of curry powder/paste increased in terms of value and the export of mint products increased in terms of volume.
- India exported US\$ 4.1 billion worth of spices in FY22. From this share, US\$ 1.8 billion constituted core spices - dried chilli, cumin, and turmeric, followed by over US\$ 1.2 billion in exports of mint products, spice oils, and oleoresins.



# Background: Indian whole spices *conti...*

## Major Export Destinations

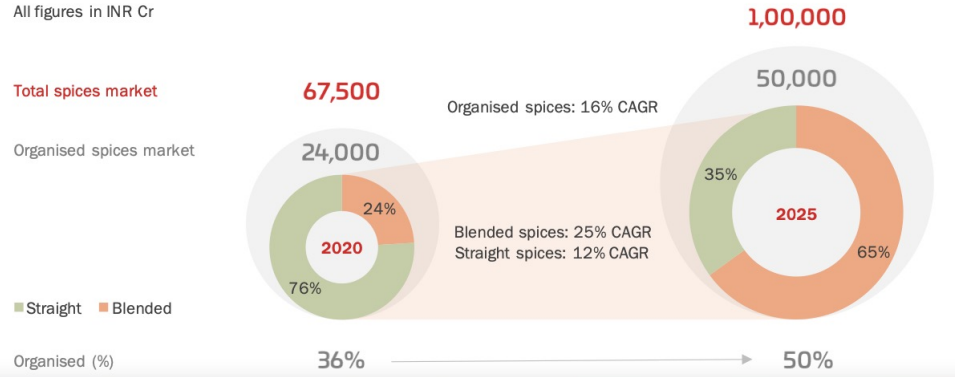
- India exported spices and spice products to 180 destinations worldwide as of 2022. The top destinations among them were China, the USA, Bangladesh, Thailand, the UAE, Sri Lanka, Malaysia, the UK, Indonesia, and Germany. These nine destinations comprised more than 70 per cent of the total export earnings in 2020-21.
- Spices worth US\$ 813.81 million (Rs. 6,66,927.42 lakh) were exported to China in 2021-22 (E). USA imported spices worth US\$ 618.34 million (Rs. 5,06,734.88 lakh) in 2021-22. Bangladesh imported spices worth US\$ 212.64 million (Rs. 1,74,264.25 lakh) from the country during the above period. UAE exported spices worth US\$ 227.39 million (Rs. 1,86,350.20 lakh) from India in 2021-22.
- Chilli was the most exported spice from India. During 2021-22, China imported US\$ 382.15 million in chilli. During the same period, the USA imported US\$ 115.02 million in chilli.

Indian spices market has a huge potential to grow. It can grow 2X by 2025. Current market is more than INR 25,000 Cr which can grow to INR 50,000 Cr in next 2 years. Going forward the market share of blended spices can multiply quickly.



The Indian blended spices market is growing faster than straight spices. It is expected to reach 35% share of the total organized spices pie by 2025

All figures in INR Cr





# Background: Indian whole spices *conti...*

Some of the common whole spices used are:

- [Whole Cumin](#) is mostly used in whole and spice mixes to add a smoky flavour to Indian cuisine. It can be notified by its distinct ridged brown seeds and ultimate fragrance. Cumin is specially used to give a smoky, intense flavour, but make sure that it burns easily while you dry roasted the seed.
- [Red chili](#) comes from a variety of chili pepper. It is used as a blended spice for adding flavour and a pungent taste to culinary dishes. Red chili boosts the immune system effectively, reduces risk of mortality, is a natural pain relief remedy, clears up nasal congestion and is a good source of beta carotene.
- [Turmeric](#) is one of the main commonly used Indian spices which is extracted from the root of a plant called Curcuma Longa. It also contains chemical named curcumin that helps in the reduction of swelling, pain relief, inflammation, depression, fever, itching etc.
- [Whole Coriander](#) seed is the most ubiquitous of spices that are used in the Indian spice rack. Whole coriander seeds are given out by cilantro. The traditional form of spices in the world is identified by its golden yellow colour and gently ridged texture.
- [Black pepper](#) is originally native to India, and it is identified from the Western Ghats and the Malabar region. It is a very rigid and hard spice to grow and depends on many natural cycles. It is needed to toast before blending.



# Background: Indian whole spices *conti...*

- [Fenugreek](#) is a spice with a very toned down flavor. When tasted raw and individually, they don't give much hint of the flavor that can be used for cooking. Fenugreek is commonly added to pickles and chutneys for enhancing the flavors. It has health benefits like boosting testosterone, reducing cholesterol, lowering blood sugar and inflammation etc.
- [Fennel whole](#) seeds are tremendous flavoring ingredient for tarkas and many other Indian curries. These are also used as refreshment after meals. They have a very pleasant aroma and have culinary as well as medicinal uses. Fennel seeds can cure indigestion, are a good source of vitamin C, build bone strength and prevent cancer.
- [Ajwain](#) seeds are also known as carom seeds. These are technically dry fruits even though they look like seeds. Every seed has a significant thymol content, making the flavor. Ajwain is a great source of mono saturated fatty acids, it prevents pre-mature gray hair, it gives relief from acidity and gas, and treats asthma as well as chronic cough.
- [Rai](#) comes in different colors; yellow, black and brown. It is a very essential component in Indian cooking. The aroma is faintly spicy and the flavor is nutty, adding a sharp edge to curries. Rai is great for maintaining cardiovascular health, it gives relief from cough and cold, boosts hair growth, contains calcium, zinc and dietary fiber along with magnesium and iron.



# Overview: Indian Spices

## Largest spice producing states





# Market Overview: Indian spices

## Industry Highlights

India is the world's largest spice producer. It is also the largest consumer and exporter of spices. The production of different spices has been growing rapidly over the last few years. Production in 2021-22 stood at 10.87 million tonnes. During 2020-21, the export of spices reached an all-time high both in terms of value and volume by registering a growth of 17% in US\$ value terms and 30% in volume terms. During 2021-22, the single largest spice exported from India was chilli followed by spice oils and oleoresins, mint products, cumin and turmeric.

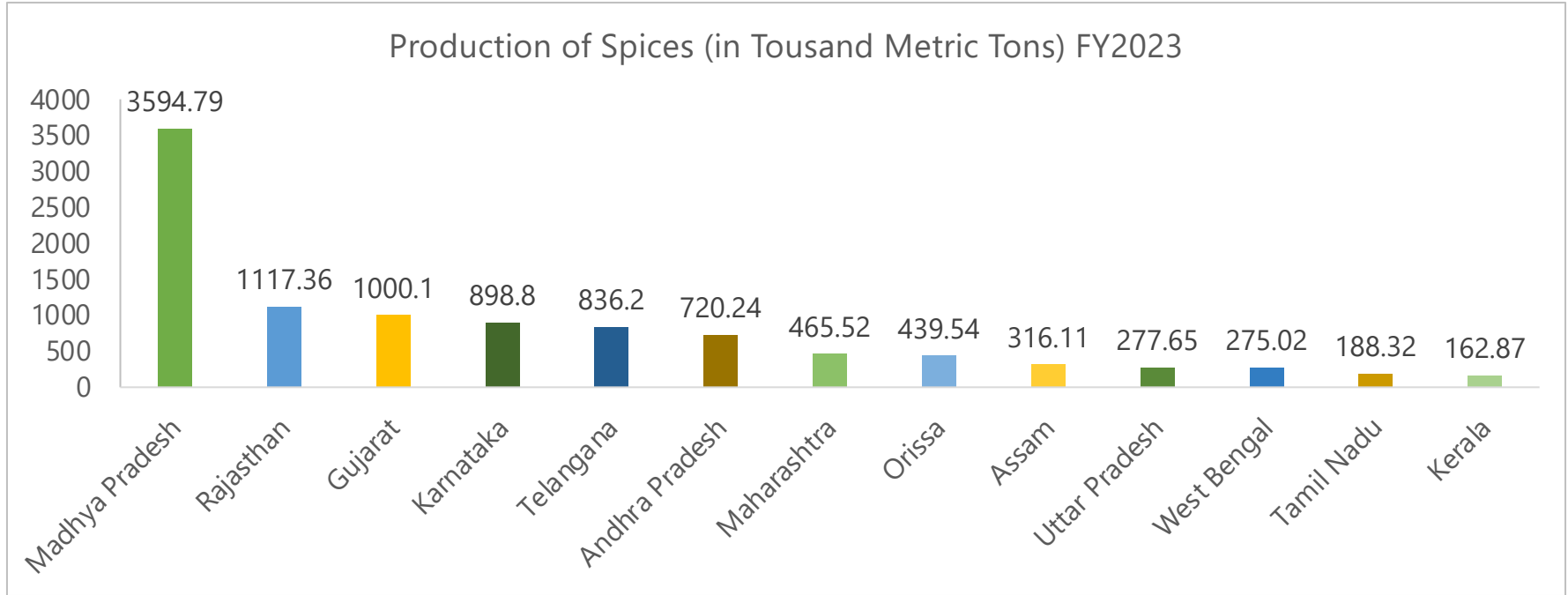
India produces about 75 of the 109 varieties. The most produced and exported spices are pepper, cardamom, chilli, ginger, turmeric, coriander, cumin, celery, fennel, fenugreek, garlic, nutmeg & mace, curry powder, spice oils and oleoresins. Out of these spices, chilli, cumin, turmeric, ginger and coriander makeup about 76% of the total production.

The largest spices-producing states in India are Madhya Pradesh, Rajasthan, Gujarat, Andhra Pradesh, Telangana, Karnataka, Maharashtra, Assam, Orissa, Uttar Pradesh, West Bengal, Tamil Nadu and Kerala.



# Market Overview: Indian spices

Statewise production of spices in India:





# Production: Largest spices producing states

- ◎ **Pepper:** Karnataka, Kerala, Tamil Nadu
- ◎ **Cardamom (Small):** Kerala, Karnataka, Tamil Nadu
- ◎ **Cardamom (Large):** Sikkim, West Bengal, Arunachal Pradesh
- ◎ **Chilli:** Andhra Pradesh, Telangana, Madhya Pradesh, Karnataka, West Bengal
- ◎ **Ginger:** Madhya Pradesh, Karnataka, Assam, West Bengal, Odisha
- ◎ **Turmeric:** Telangana, Maharashtra, Karnataka, Tamil Nadu, Andhra Pradesh
- ◎ **Coriander Seed:** Madhya Pradesh, Gujarat, Rajasthan, Assam, West Bengal
- ◎ **Cumin Seed:** Gujarat, Rajasthan
- ◎ **Celery Seed:** Punjab
- ◎ **Fennel Seed:** Gujarat, Rajasthan, Madhya Pradesh, West Bengal, Uttar Pradesh
- ◎ **Fenugreek Seed:** Madhya Pradesh, Rajasthan, Gujarat, Haryana, West Bengal
- ◎ **Garlic:** Madhya Pradesh, Rajasthan, Uttar Pradesh, Gujarat, Punjab
- ◎ **Tamarind:** Karnataka, Tamil Nadu, Kerala, Andhra Pradesh, Telangana
- ◎ **Cloves:** Tamil Nadu, Karnataka, Kerala
- ◎ **Nutmeg:** Kerala, Karnataka, Andaman & Nicobar

# Consumer Research

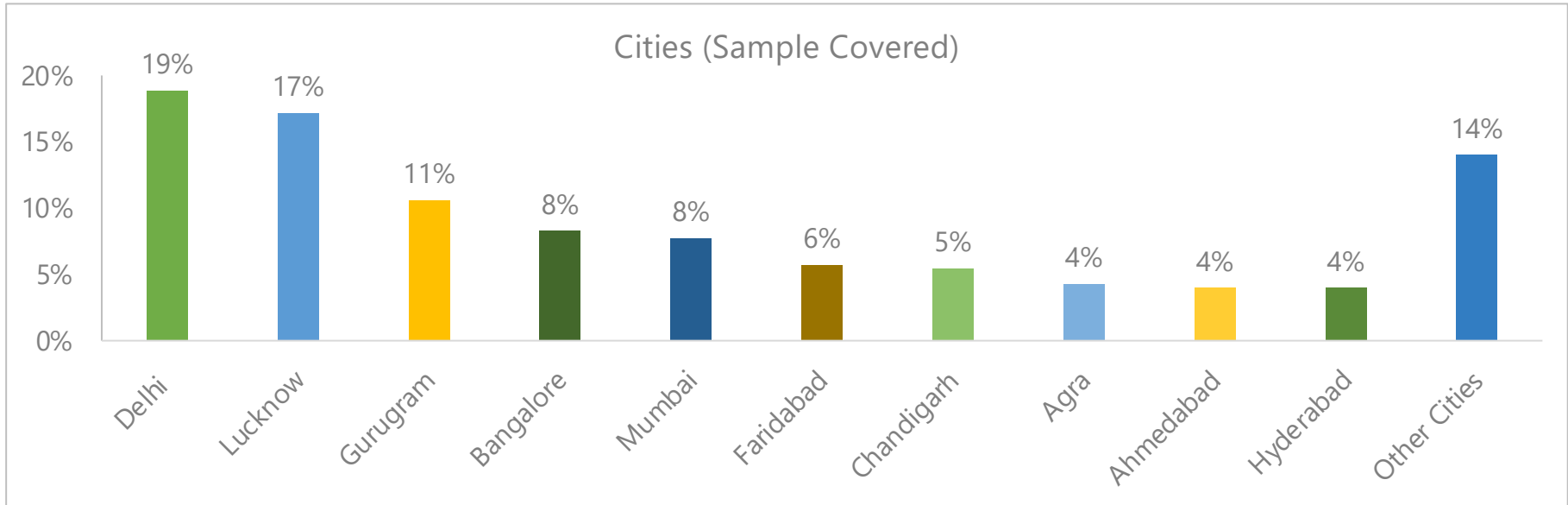
# SAFEST SPICES in India





# Cities covered in the study: Sample distribution

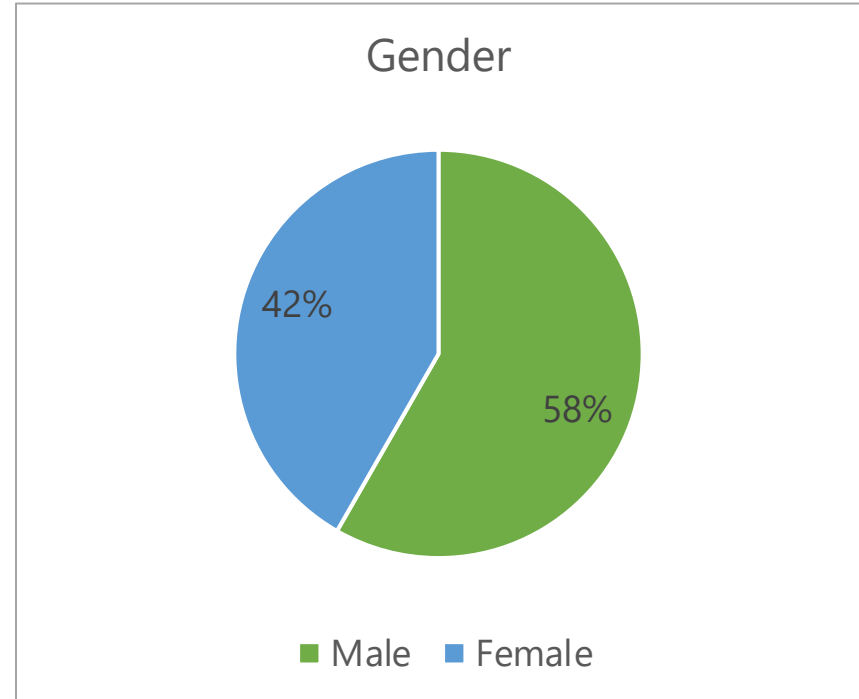
- There are around 350 consumers have been covered from different cities in India. The sample distribution have been done across Tier I, Tier II and Tier III cities in India.
- We have taken a representative sample from each city and the sampling technique was random.





# Demographic profile: Gender

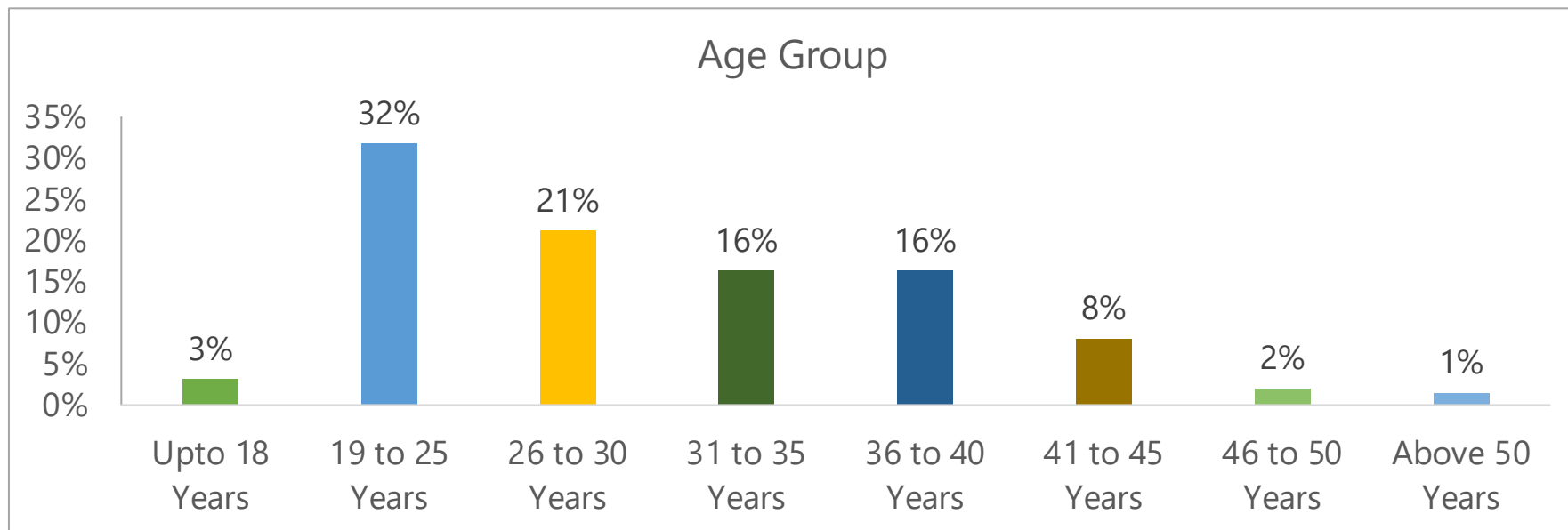
- Spices are primarily purchased and used in the kitchen by female, so we have taken a mix of male and female respondents in the survey.
- There are around 58% survey participants were male and 42% female.





# Demographic profile: Age groups

- A mix of all age groups have been taken into the survey.
- There are around 32% participants belongs to 19 years to 25 years.
- Most of the respondents were aged from 18 years to 45 years.

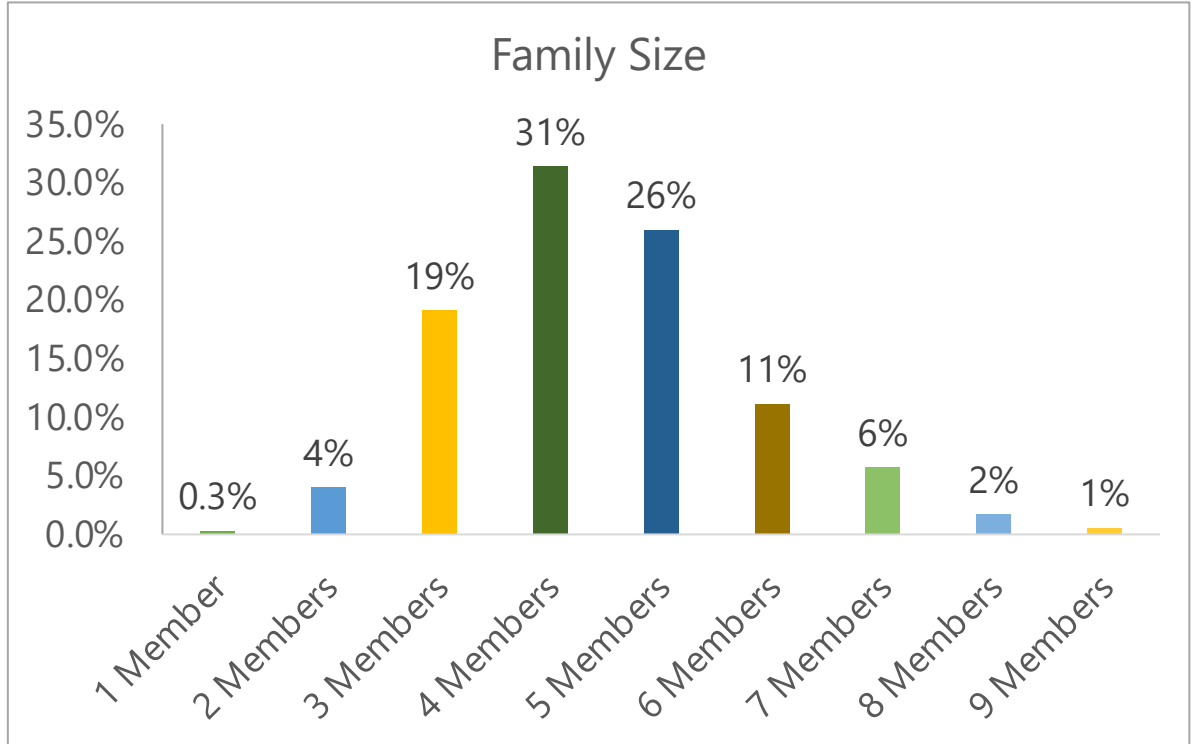






# Demographic profile: Family size

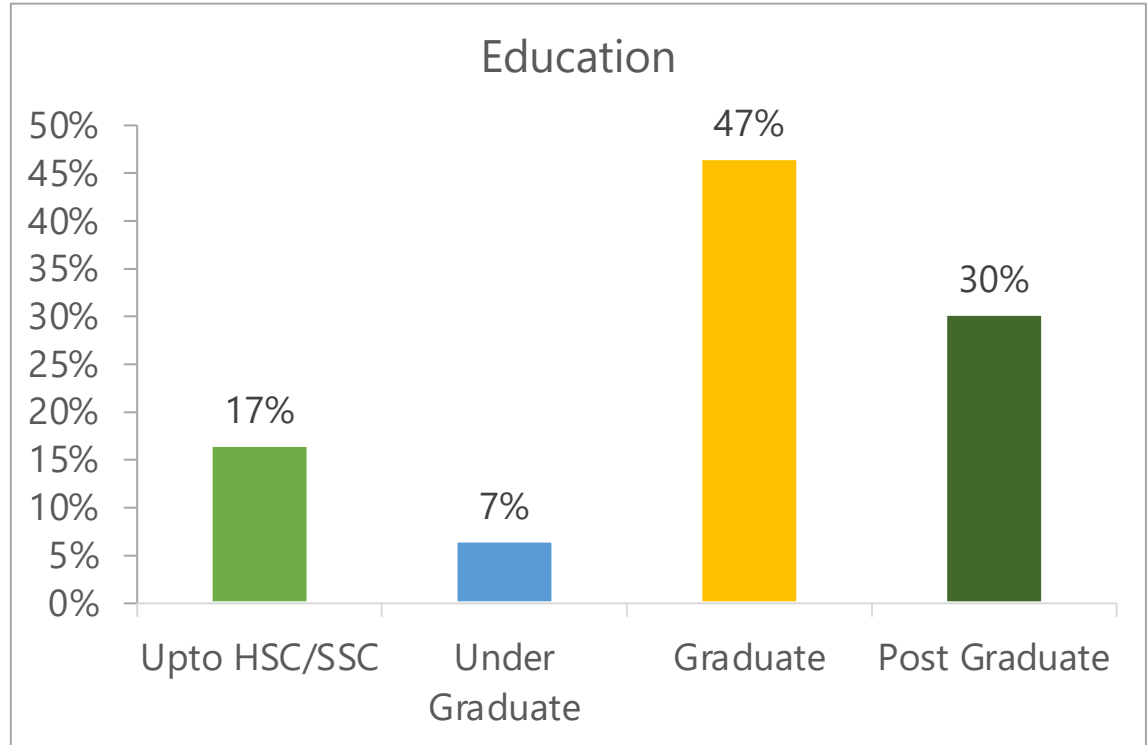
- Average family size of the respondents participated in the survey was 4 to 5 members.
- There are 31% family have 4 members in the family.
- 26% of the total members have 5 members in the family.





# Demographic profile: Education

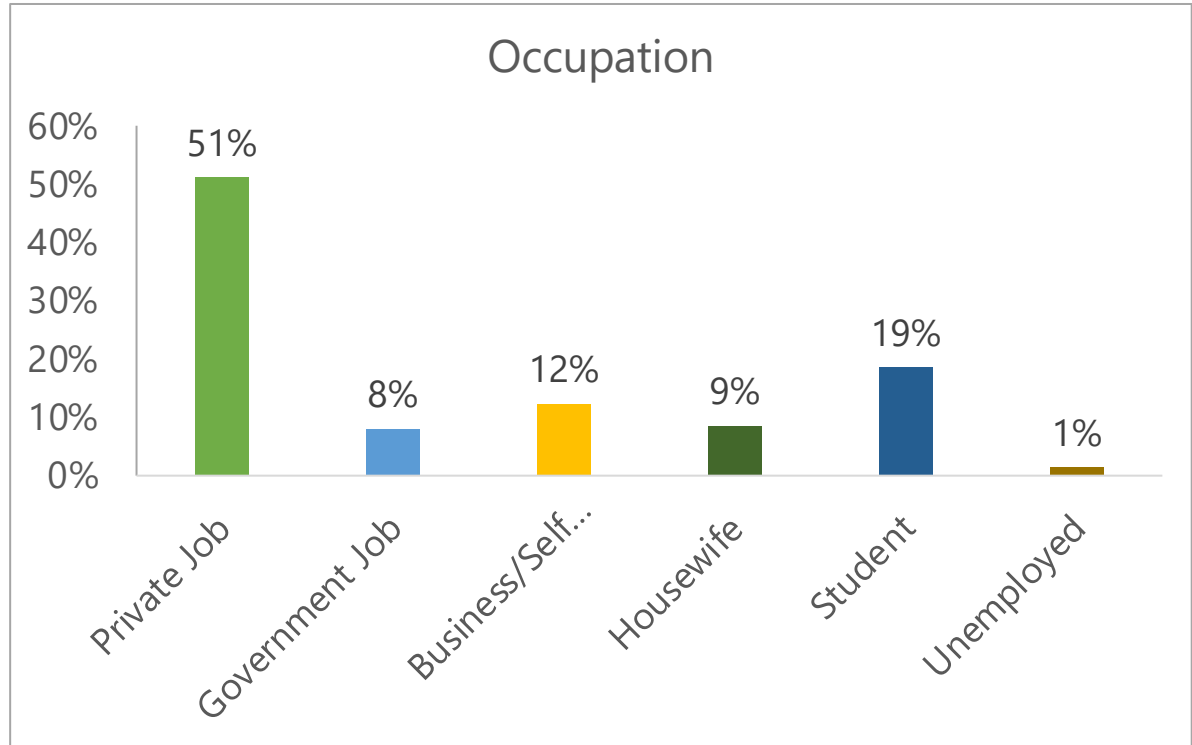
- There are 17% respondents have education level of upto HSC/SSC.
- 7% of the total participants were undergraduate.
- There are 47% survey participants have completed graduation degree.
- 30% of the total participants were post graduate or higher.





# Demographic profile: Occupation

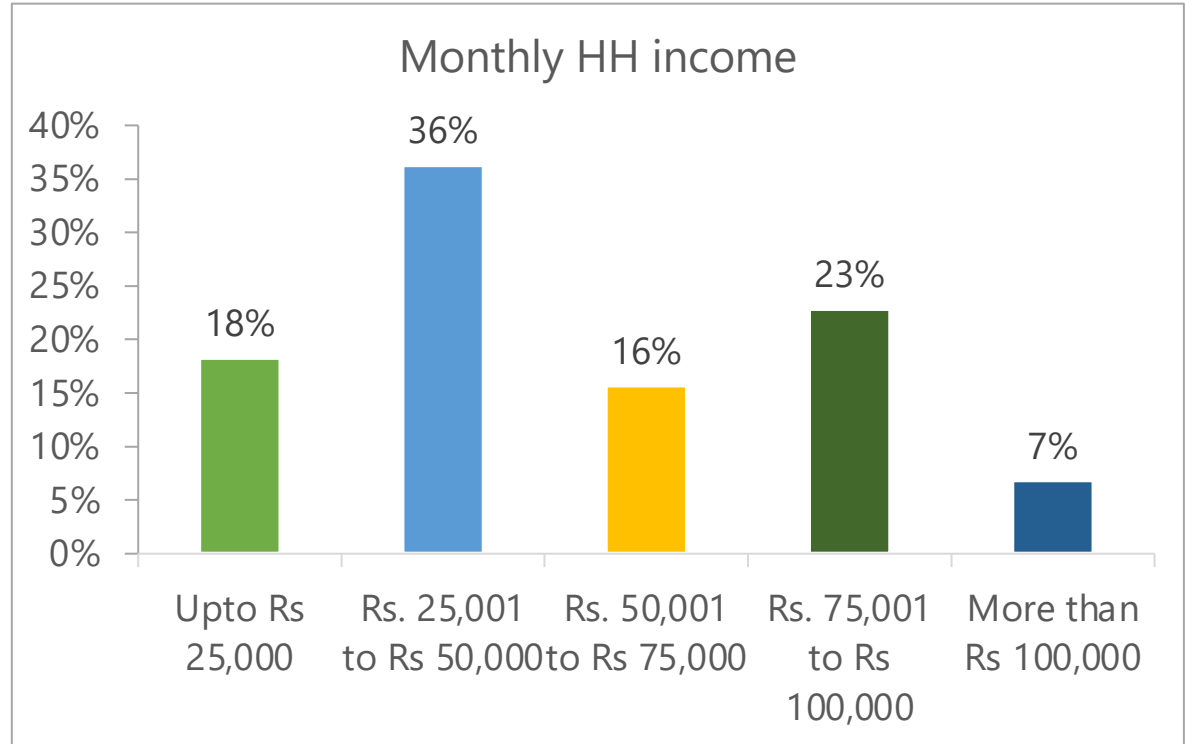
- We have tried to take the respondents from all the profession.
- There are 51% people were doing the private jobs.
- 12% of the total participants were self employed or doing own business.
- Only 8% of the total participants were doing the Govt jobs.

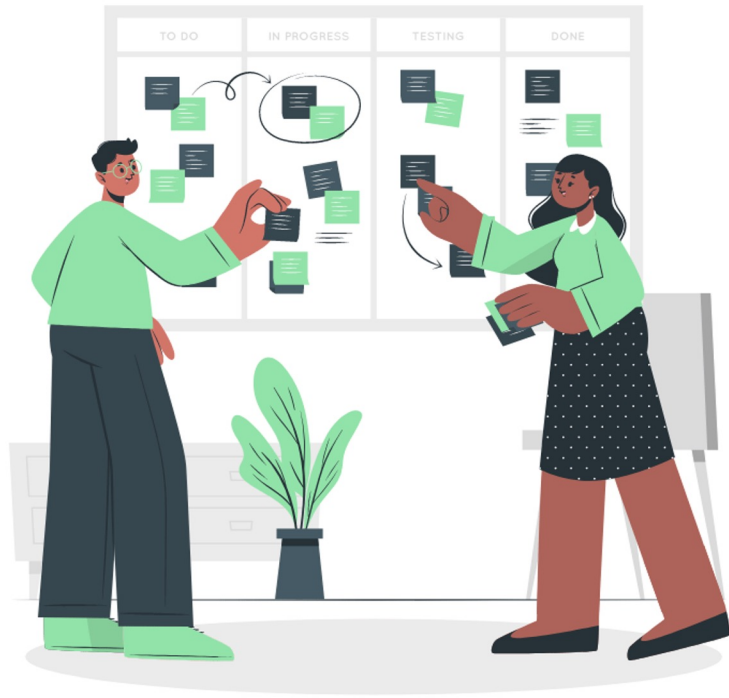




# Demographic profile: Monthly household income

- We have found mostly the middle-income group in the sample. There are 36% families have monthly household income of Rs 25000 to Rs 50000.
- 23% of the total families have monthly income from Rs 75000 to Rs 100000.
- There are 7% families have more than Rs 100000 monthly household income.





# Brand awareness

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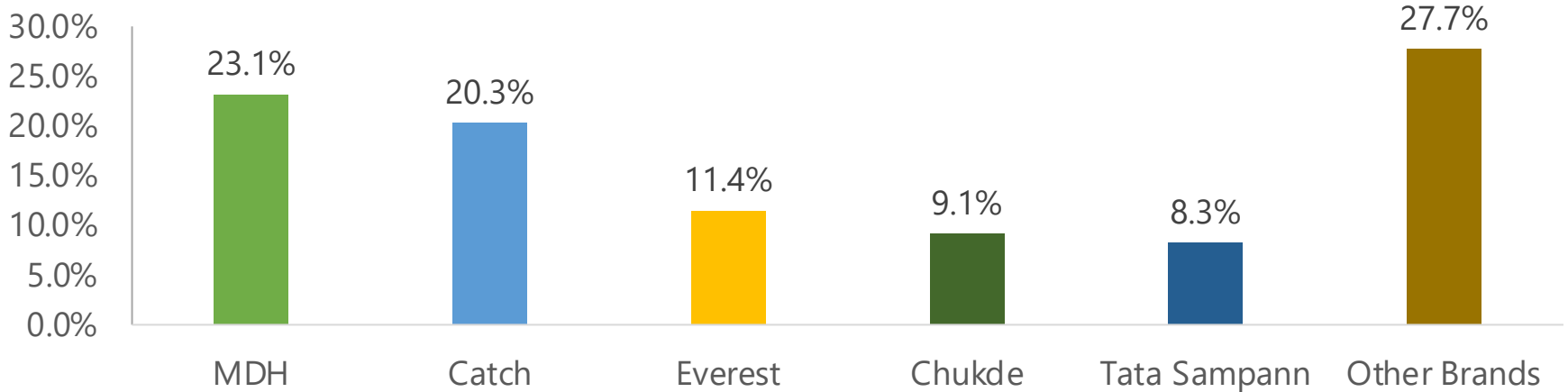
# Indian Spices



# Brand awareness: TOP OF MIND (TOM) Recall

- The brand awareness of MDH is highest among Indian consumers followed by Catch. For 23% consumers MDH is the Top-Of-Mind (TOM) brand.
- For around 20% consumers Catch is the TOM brand.
- Chukde is one of the fastest growing brand in Indian spice market. For 9% Chukde is the Top-Of-Mind brand.

Spices brands aware: TOM

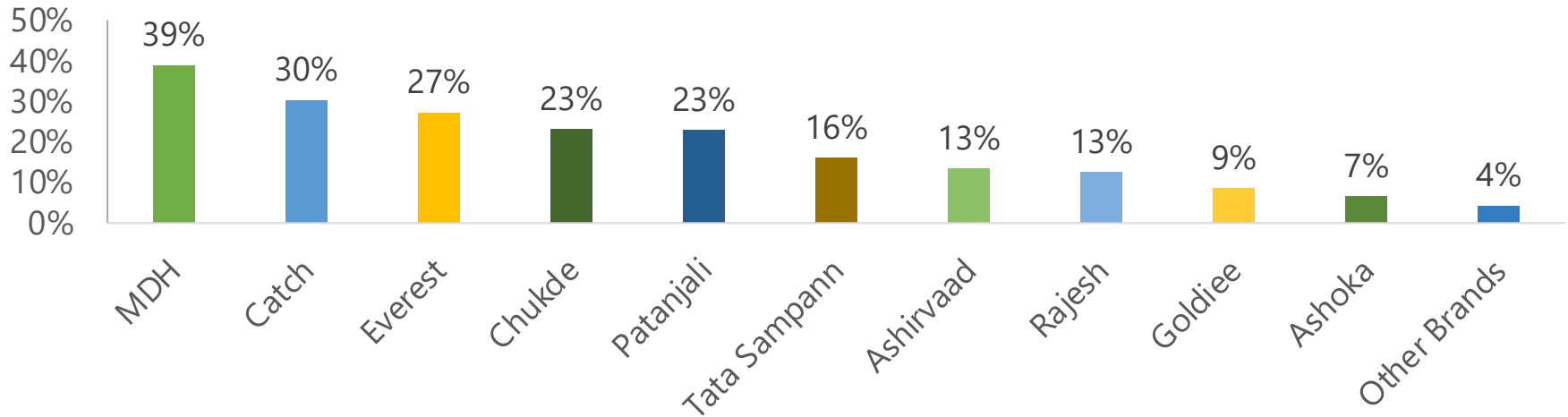




# Brand awareness: Unaided recall (Spontaneous)

- 39% of the total consumers aware of MDH without giving any assistance or probe.
- Another 30% recalled Catch spices spontaneously.
- Chukde have a very good brand recall. There are 23% consumers recalled Chukde spontaneously.

Unaided recall (Spontaneous)

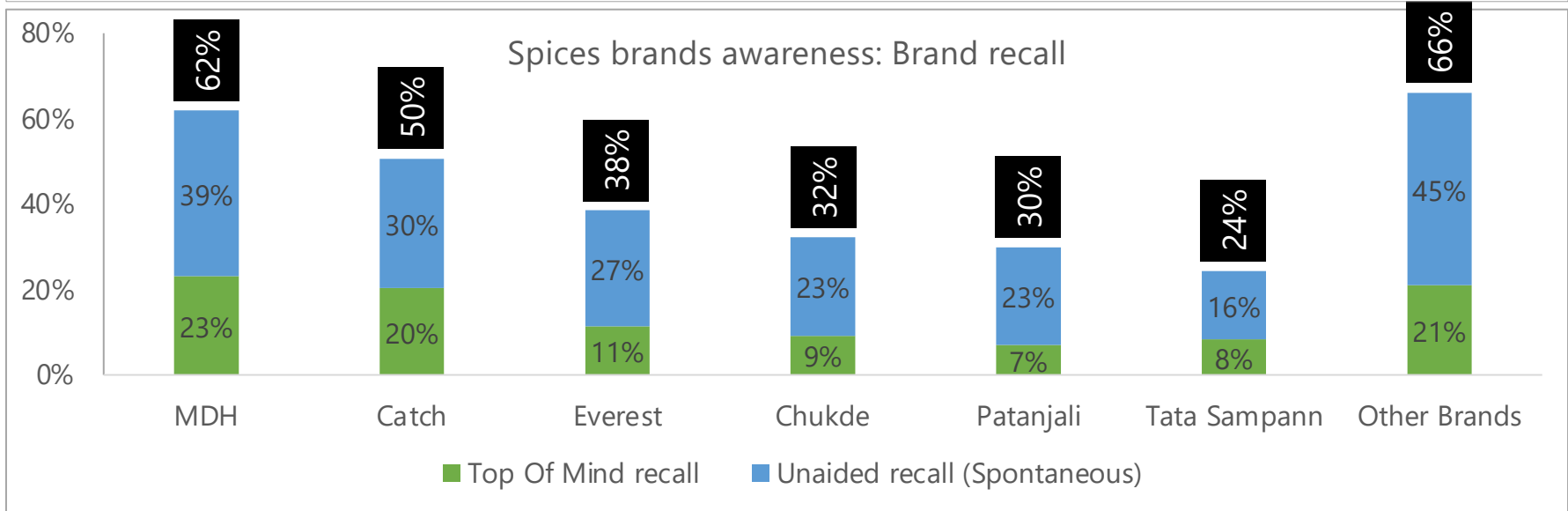




# Brand awareness: TOM & Unaided Recall (Overall)

Overall brand recall (TOM & Unaided) for the major spice brands are as follows:

- MDH is the most popular with 62% instant awareness.
- Half of the consumers aware of Catch followed by Everest brand.
- There are 32% of the total consumers aware of Chukde spices.

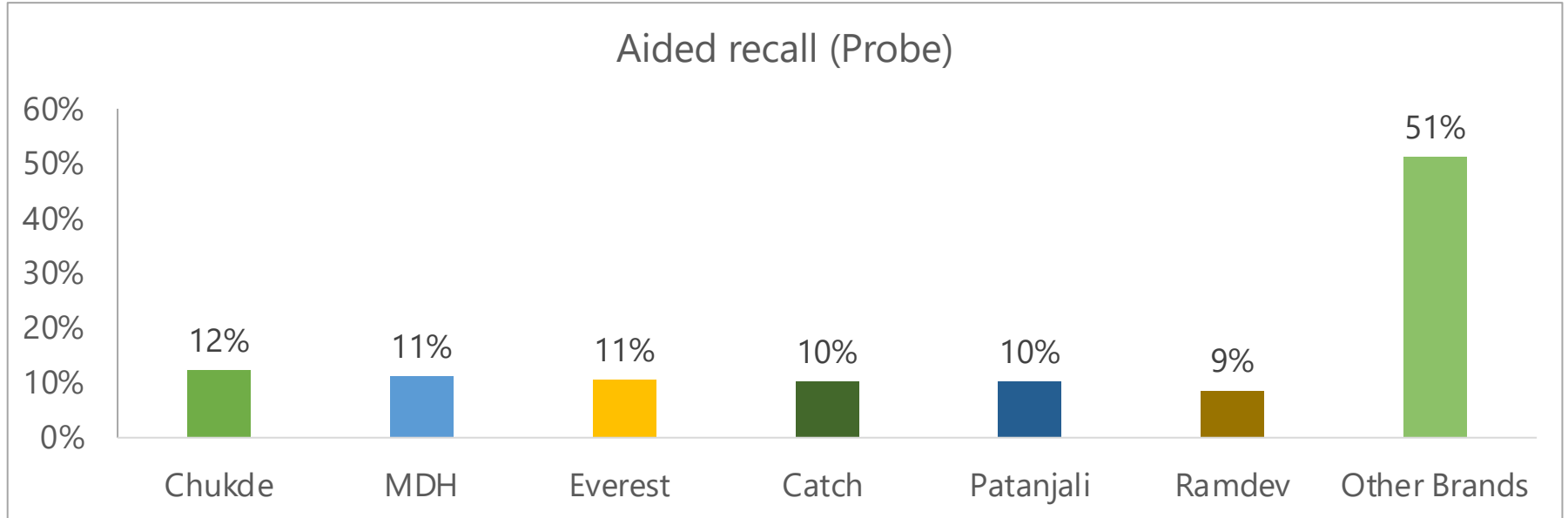






# Brand awareness: Aided recall (probe)

- After probing 12% consumers recalled Chukde brand followed by MDH, Everest, Catch and Patanjali brand of spices.

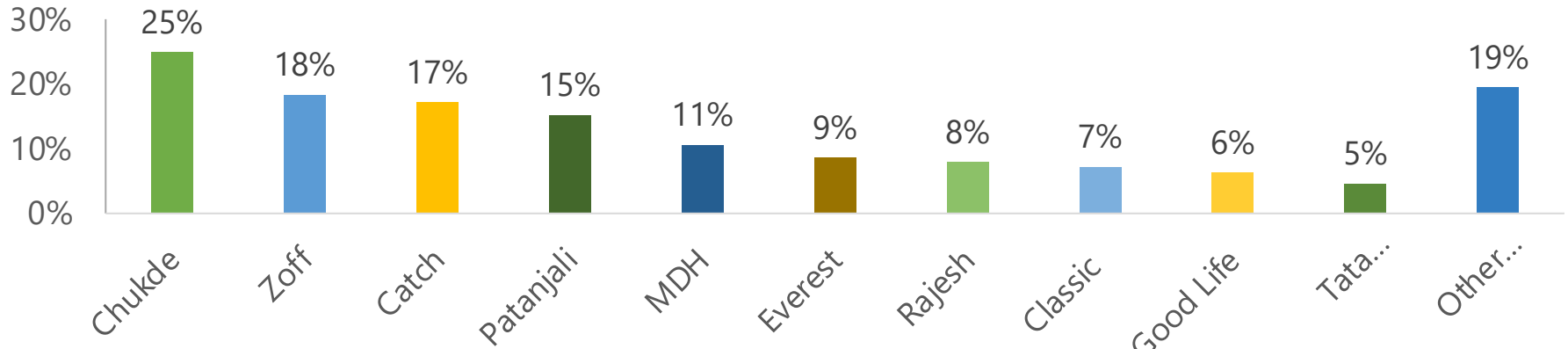




# Brand awareness: Whole Spices (Khade/Sabut/Masale)

- Among the whole spices (khade masala) Chukde have very good brand recall among the general consumers in India. There are 1/4<sup>th</sup> of the total consumers aware of the Chukde whole spices.
- In consumer awareness index of whole spices, it is number one brand in India.
- Brand recall value of the Zoff is also good among the consumers in India. The other brands like Catch, Patanjali, MDH and Everest have very good awareness among the consumers.

Brand awareness: Whole spices (Khade/sabut Masale)



*(as per consumers the major brands like MDH, Catch, Patanjali and Everest have selected whole spices. For example, Zeera, Dhania Whole, sold by most of the brands)*

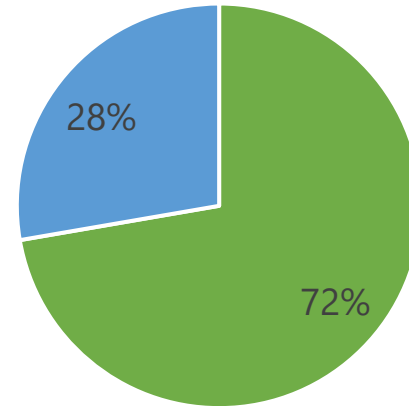


# Brand awareness: Aware of Chukde brand

- The brand awareness of Chukde is very good among the consumers. There are 72% consumers aware of Chukde brand in India.



Aware of CHUKDE

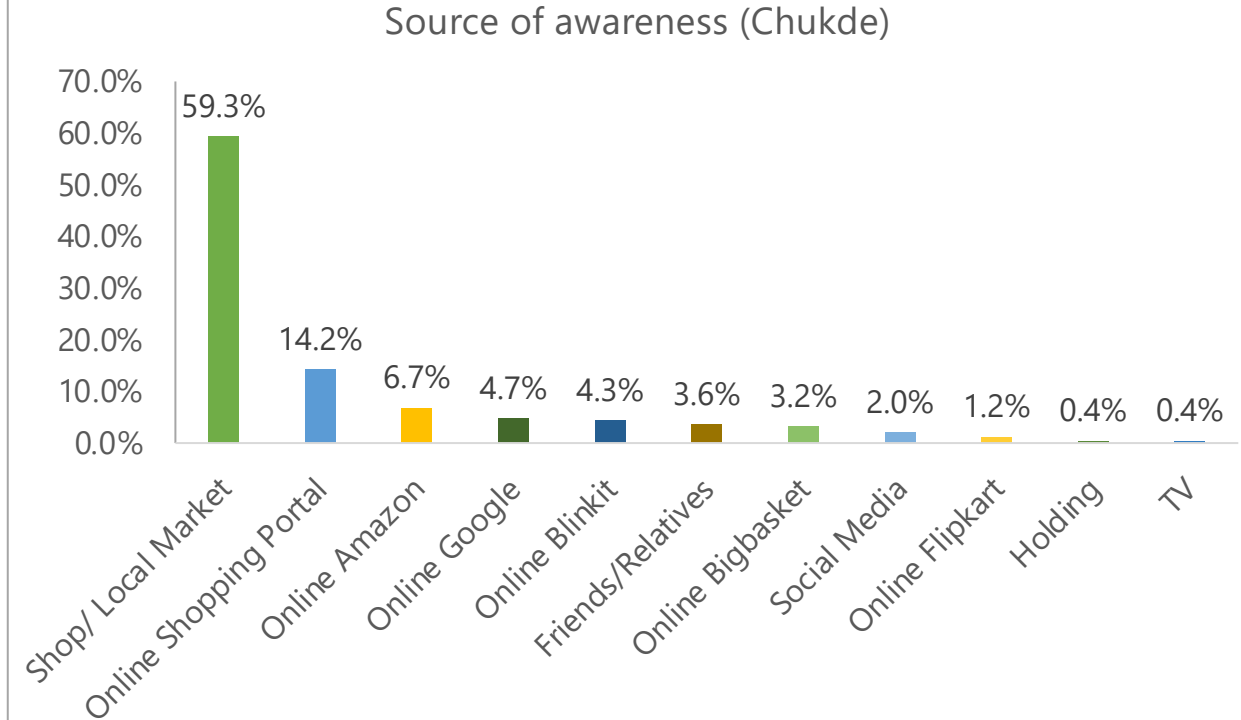


■ Yes ■ No



# Brand awareness: Source of awareness (Chukde)

- Consumers get to know about Chukde brands primarily from shops or local market. As per consumers the Chukde brand has good availability in local markets.
- Online shopping platforms also plays key role in awareness of Chukde brand. Online shopping platforms like Amazon, Blinkit, Flipkart or Google having reasonable presence of Chukde brand.



# Brand Usage

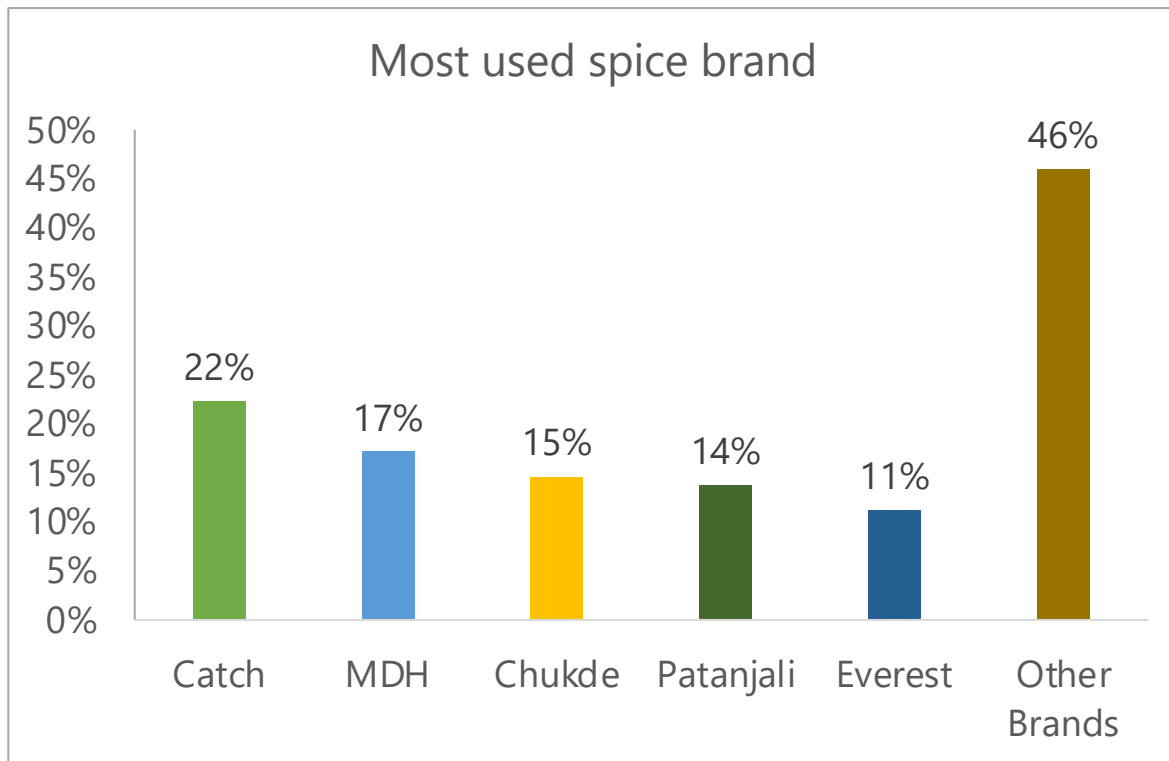
Most used and  
best brand of  
spices





# Brand usage: Most used spice brands

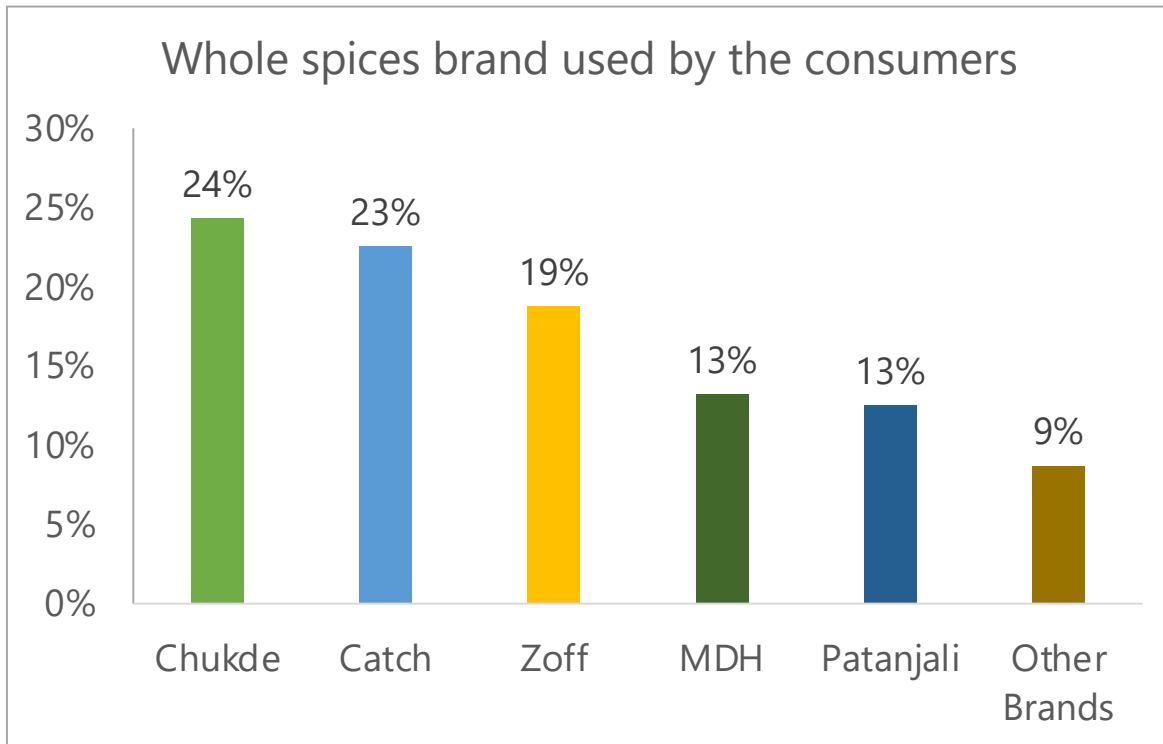
- Catch is the most used spice brand in India. There are 22% consumers use Catch spices.
- MDH is the 2<sup>nd</sup> most used brand among the consumers, used by 17% people.
- There are 15% consumers using Chukde brand of spices. It is a very good percentage because Chukde is relatively a new brand among the peers.





# Brand usage: Whole spices brand used by consumers

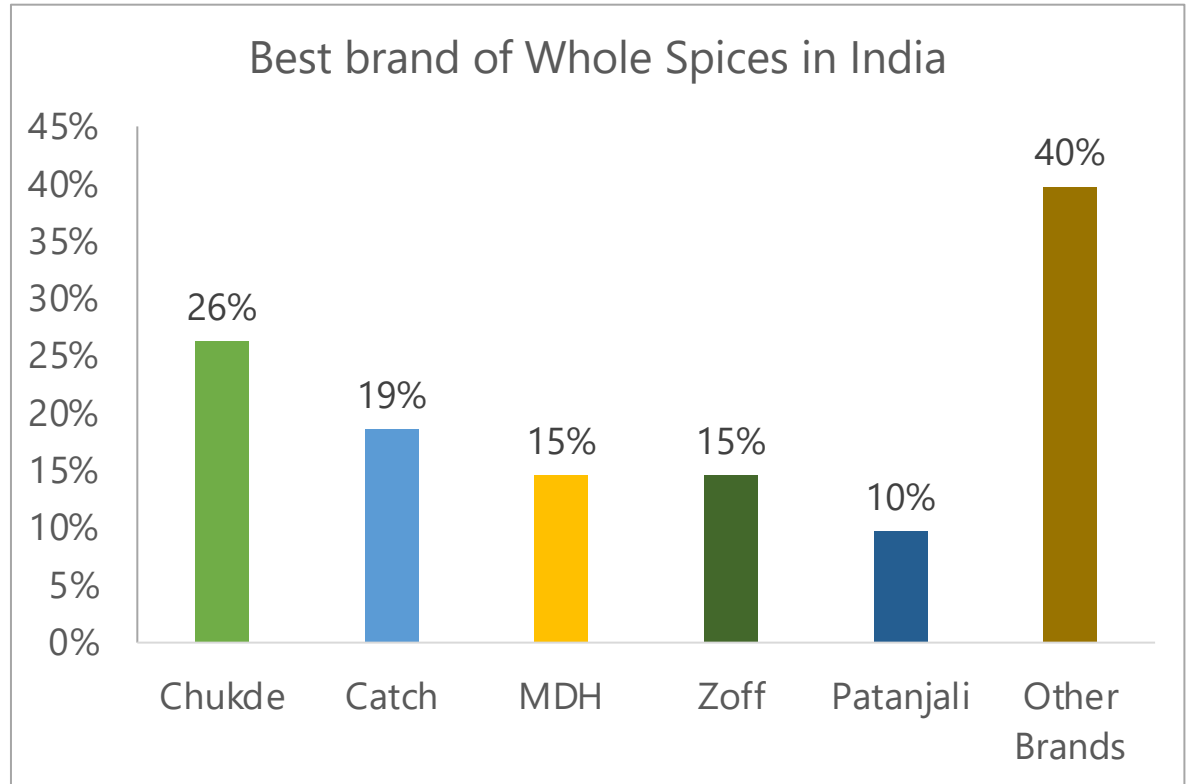
- Among the whole spices, there are limited well-known players in Indian market. But most of the brands/ companies have selected SKUs of whole spices. Among them Whole Coriander (Sabut Dhania), Whole Cumin (Sabut Zeera), Carom (Ajwain), Black Pepper (Kali Mircha), etc. are commonly mostly sold by each company.
- Chukde is the brand leader in whole spices in India. There are 24% consumers using Chukde brand of whole spices.





# Best brand: Best brand of Whole Spices in India

- Among the whole spices, there are limited well-known players in Indian market. But most of the brands/ companies have selected SKUs of whole spices. Among them Whole Coriander (Sabut Dhania), Whole Cumin (Sabut Zeera), Carom (Ajwain), Black Pepper (Kali Mircha), etc. are commonly mostly sold by each company.
- Chukde is the brand leader in whole spices in India. There are 24% consumers using Chukde brand of whole spices.

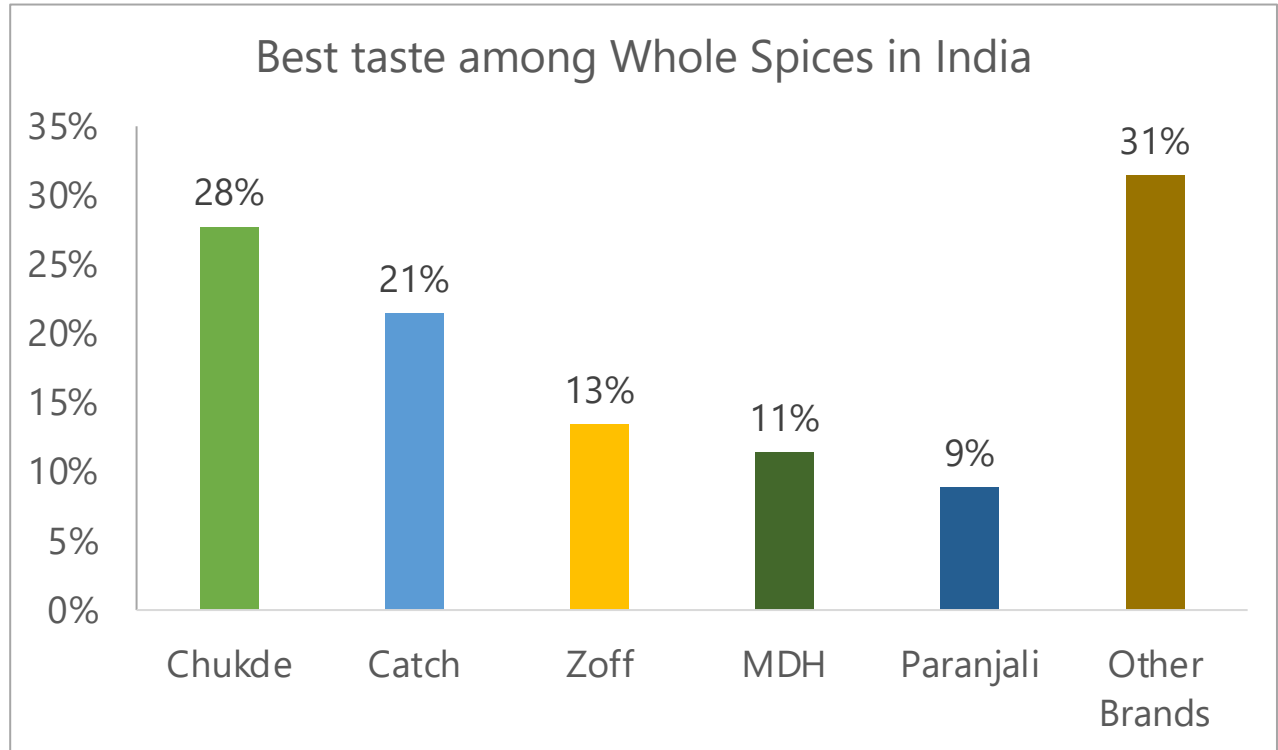


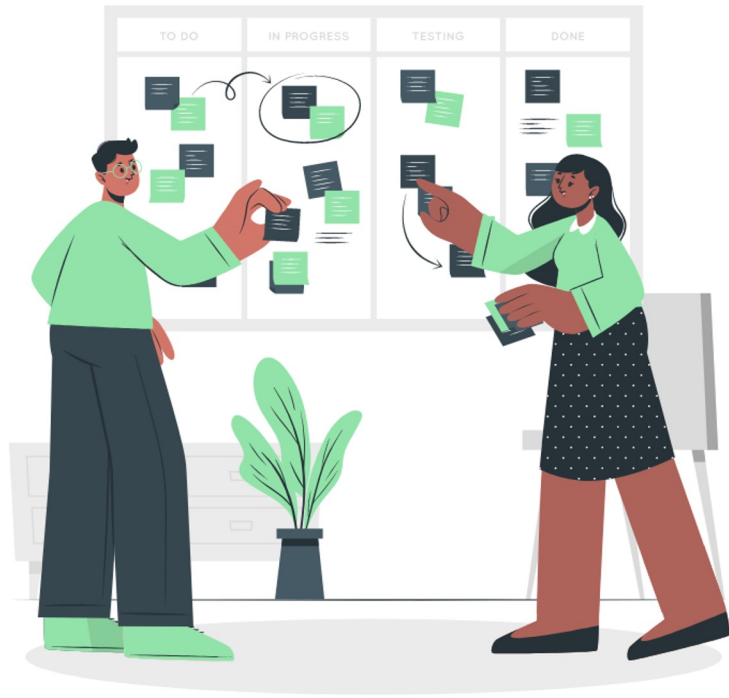




# Best brand: Best taste among Whole Spices in India

- Chukde whole spices are treated best in taste. There are 28% consumers believe the taste of Chukde spices are one among the best followed by Catch.
- Taste of Zoff spices is preferred by 13% consumers India.





# Safest Brand

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# Indian Spices

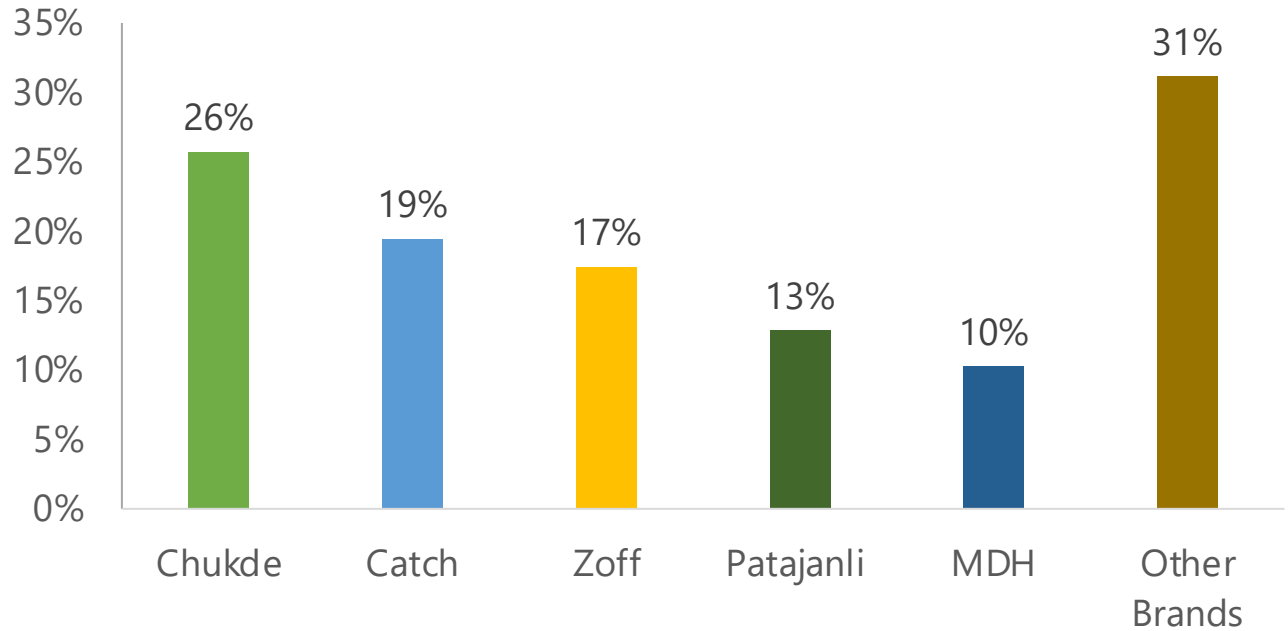


# Safest spice brand: Whole Spices

- Chukde whole spices are considered as SAFEST WHOLE SPICES by the general consumers in India. There are 26% consumers perceive Chukde whole spices are safest.



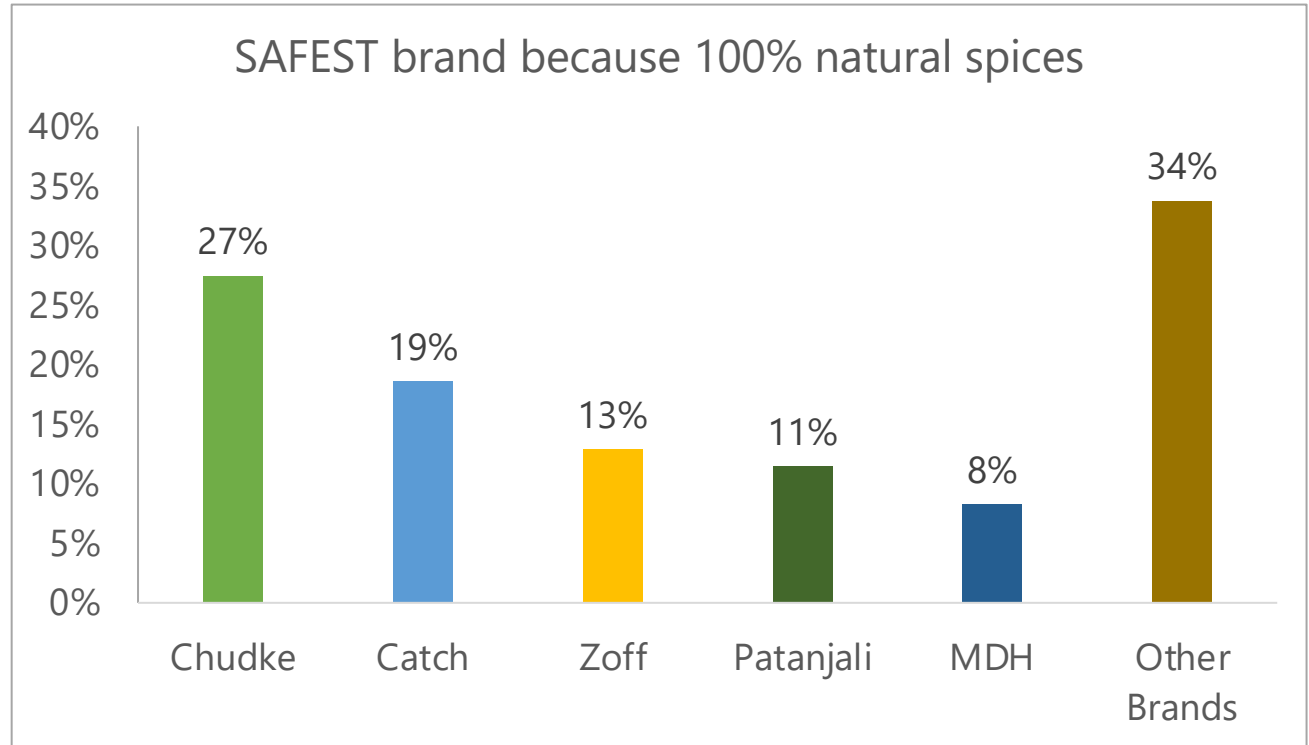
SAFEST brand of Whole Spices in India





# Safest spice brand: Because 100% natural spices

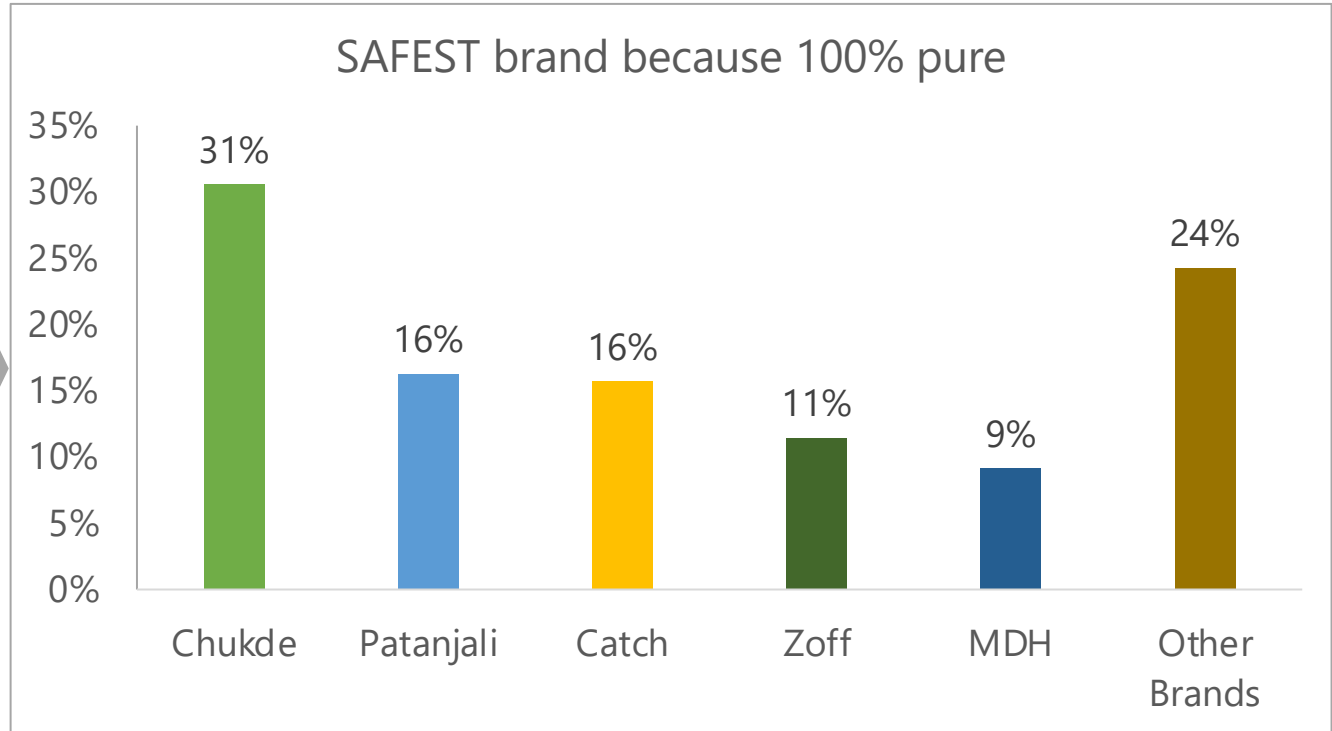
- Consumers in India perceive Chukde whole spices are safest whole spices because they are 100% natural spices. No additives or any adulteration being done with Chukde spices.





# Safest spice brand: Because 100 pure

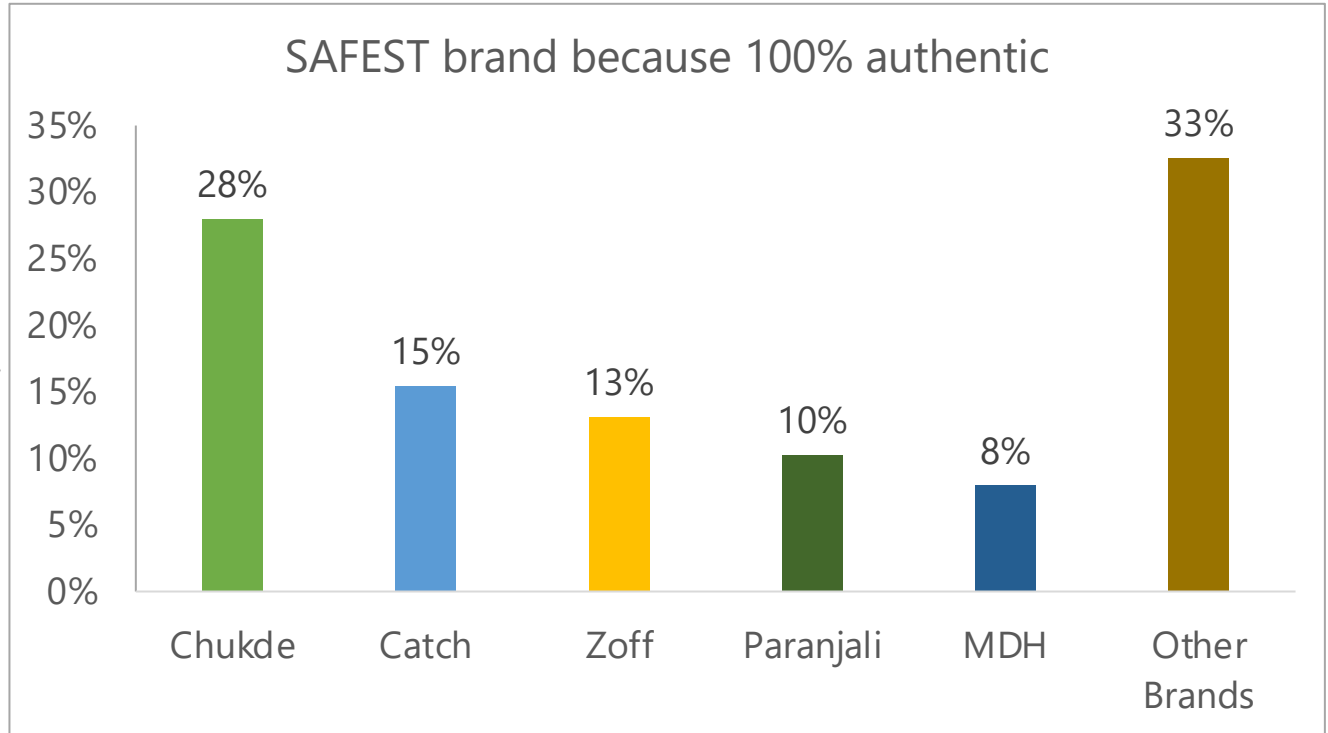
- For 31% consumers Chukde whole spices are safest because they are 100% pure spices.





# Safest spice brand: Because 100% authentic

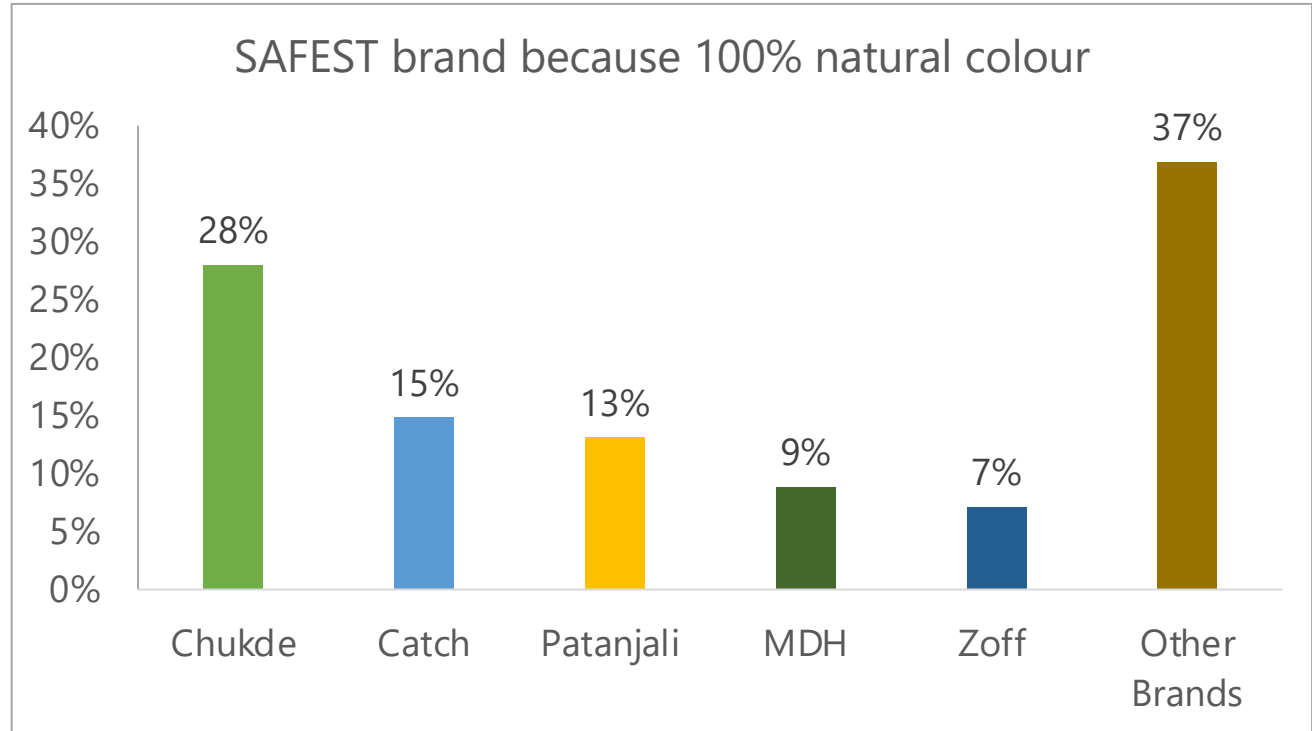
- As per 28% consumers Chukde whole spices are safest because they are 100% authentic spices.





# Safest spice brand: Because 100% natural colour

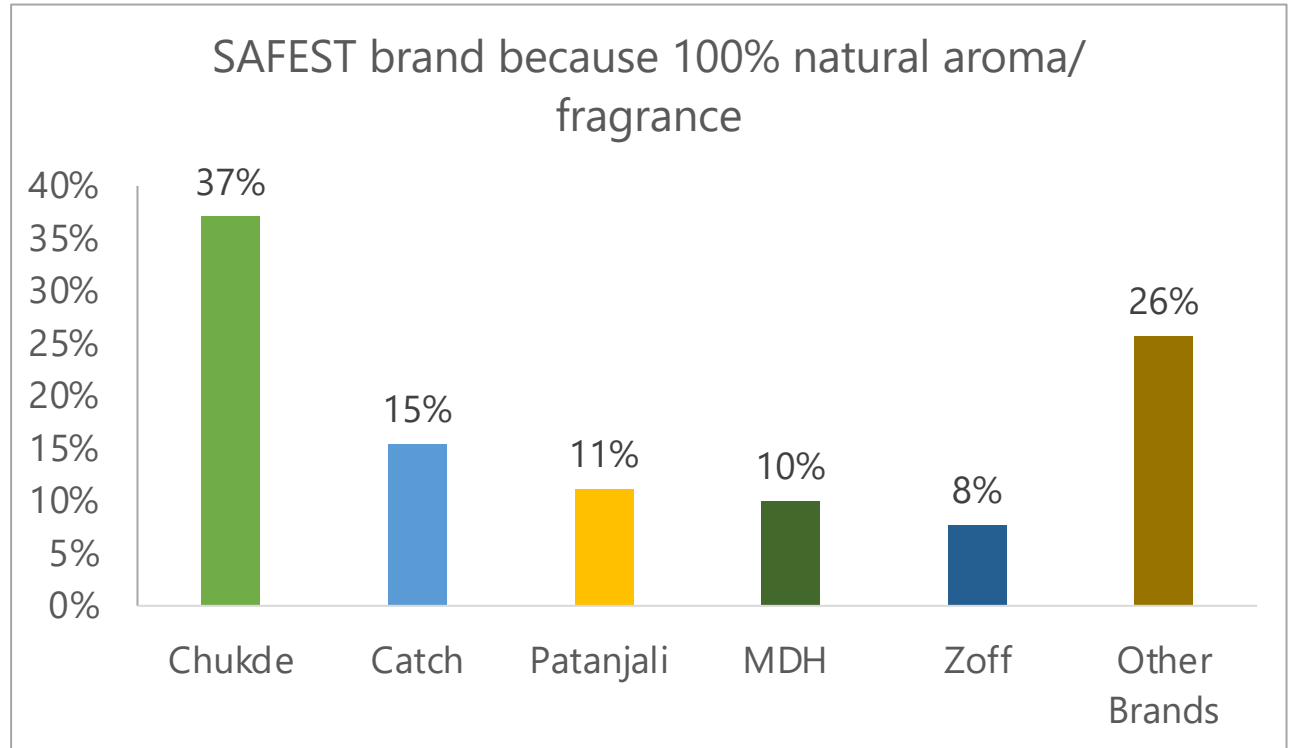
- There are 28% consumers perceive Chukde whole spices as safest because it has 100% natural colours.





# Safest spice brand: 100% natural aroma/ fragrance

37% of the total consumers perceive Chukde whole spices as safest because it has 100% natural aroma and fragrances.





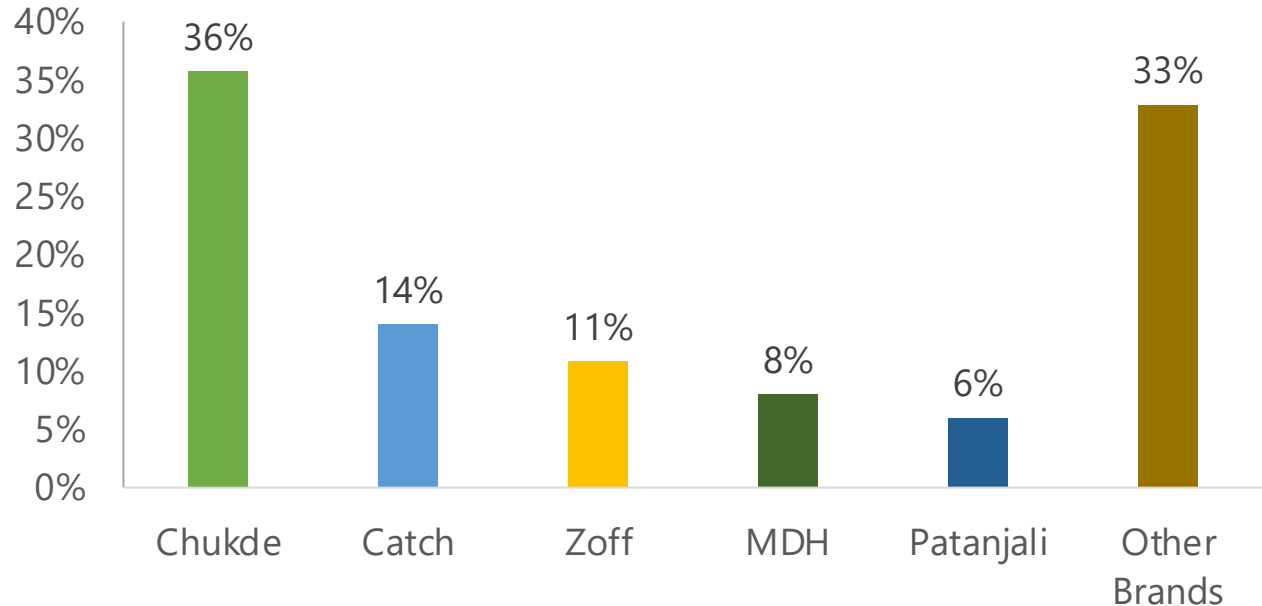


# Safest spice brand: Because 100% natural oil preserved

- There are 36% of the total consumers perceive Chukde whole spices as safest because it has 100% natural oil preserved.



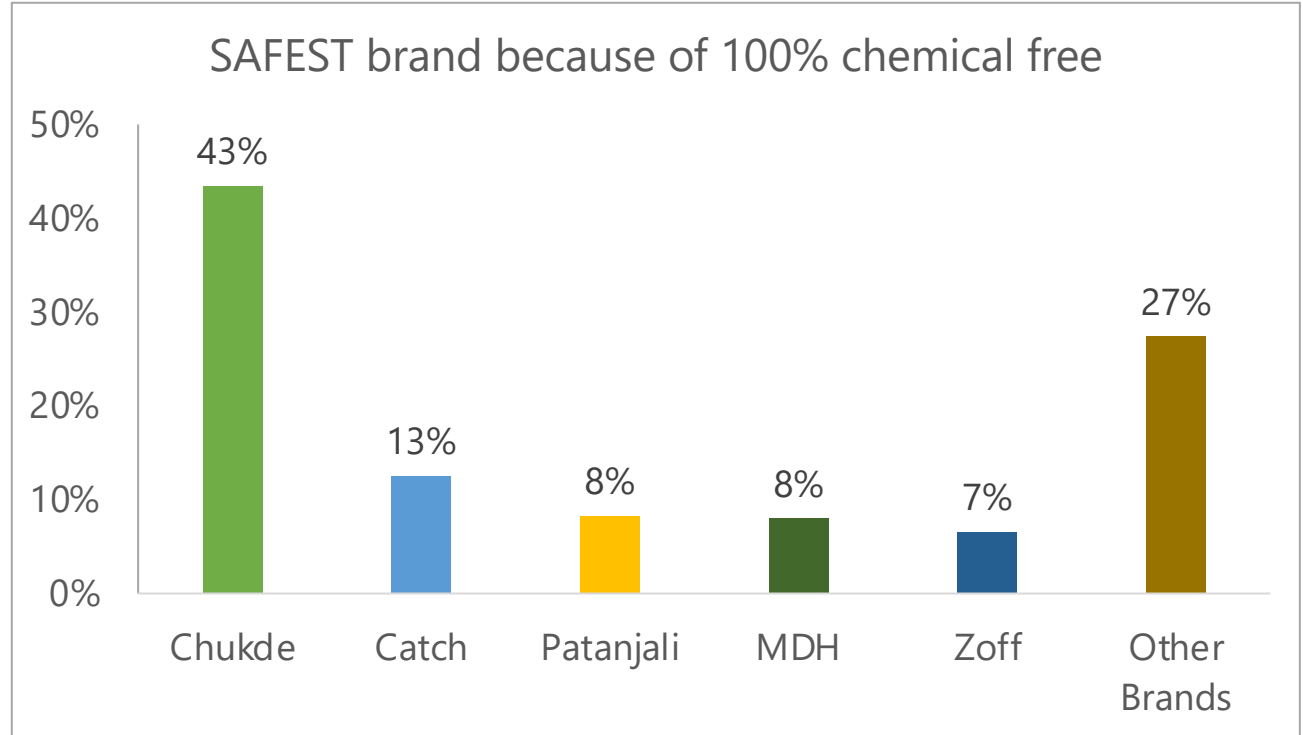
SAFEST brand because 100% natural oil preserved





# Safest spice brand: Because of 100% chemical free

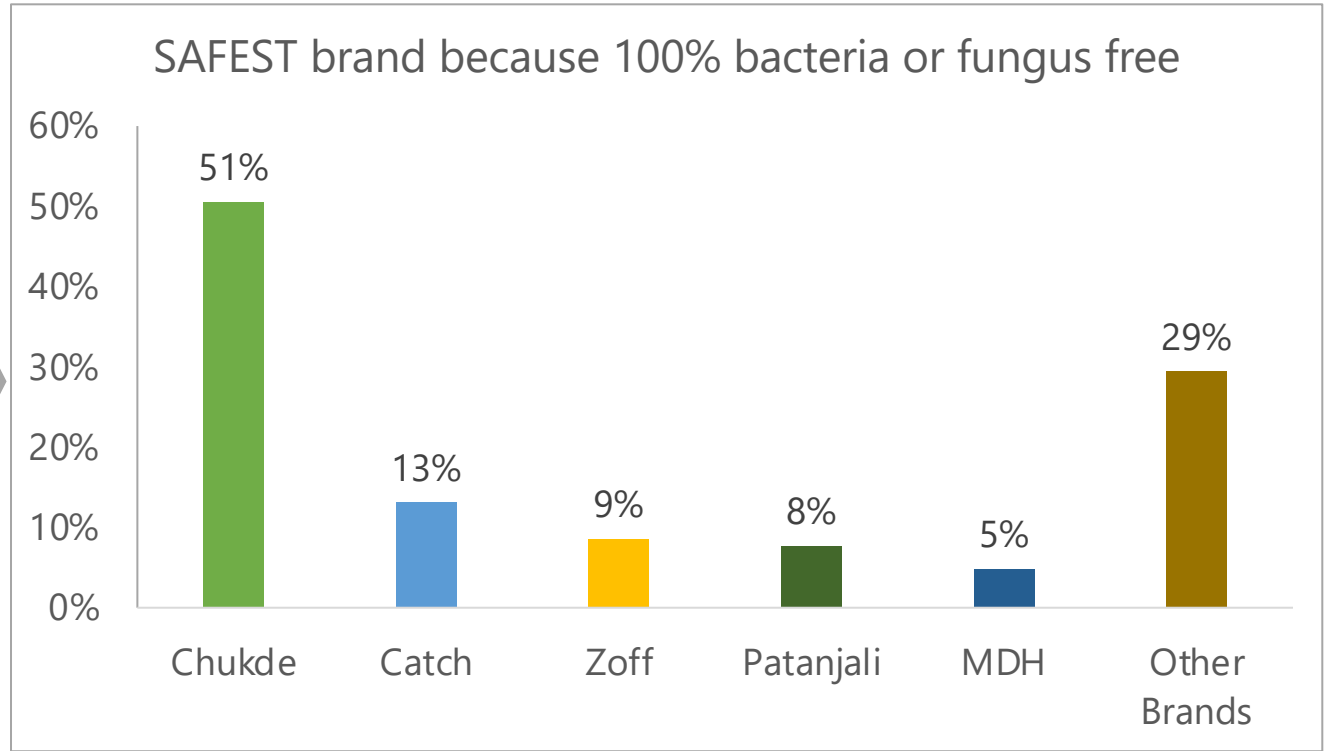
- 43% of the total consumers perceive Chukde whole spices as safest because they are 100% chemical free.





# Safest spice brand: 100% bacteria or fungus free

- There are 51% of the total consumers perceive Chukde whole spices as safest because they are 100% bacteria or fungus free.





# Reasons: CHUKDE is the Safest spice brand in India

Market research has determined that *Chukde Whole Spices* of Lifestyle Foods are one of the **SAFEST WHOLE SPICES** in India.

Points to be noted here:

- Chukde spices are purchased from the farmers using one of the best quality seeds.
- One of the most hygienic practice of manufacturing, labelling, packaging and supply chain is used.
- Chukde whole spices are made from ingredients which came from sources which went through due process of sterilization, fumigation and ensured no chemicals were used making it preservative free.
- Chukde whole spices are made by sourcing from samples which are 100% hand sorted. 100% natural ingredients are used in the making of their whole spices. Also, they ensure no sudan dye/ harmful dye is used in production process and it is prepared from high natural oil content.



# Reasons: CHUKDE is the Safest spice brand in India

- ◉ Speaking of standards maintained, Chukde is North India's 1st company to become FSSC22000, ISO 9001:2008 and ISO 22000:2005 certified. Basic certifications like FSSAI are fulfilled. Chuk-de spices pass all stringent International norms of USFDA and other countries. Chuk-de is the only whole spices company to have Gold Zed Certification.
- ◉ All the raw and finished materials pass through 5 level testing process, which is equivalent to industry 4.0 standards.
- ◉ While being the safest among whole spices in India, some health benefits noticed using Chuk-de whole spices have also been seen preventing numerous diseases:
  - 1) By improving the digestive process, they promote better digestion. Also, by lowering blood cholesterol levels.
  - 2) Many spices are typically associated with a decreased cancer risk enzymes. Their garam masala includes many spices which helps to prevent cancer.
  - 3) Chuk-de whole spices are found to be an excellent preventive for illnesses that damage the mouth and teeth.
  - 4) The ingredients available in Chuk-de garam masala also reduce diabetes levels.

THANK YOU