

Mr. Kedar Kulkarni  
Marico India Pvt Ltd.

Date: 27/02/2024

## Sub: Oats Households and HHP Values in All India Urban

This refers to your request for the estimate of Households, Penetration and Purchase value captured by Household Panel for Saffola Oats for the period January 2023 to December 2023 as per Kantar, Worldpanel Division, India (Household Purchase Panel) in All India Urban (as per survey definition).

As you are aware, Kantar, Worldpanel Division Household Purchase Panel is based on a sample of over 65,100 homes across Urban India. This is a continuous measurement system where we collect the information on the monthly purchases meant for in-home consumption for over 50 product categories from the same sample homes each month. The findings from these sample homes are then extrapolated to the estimated universe of households in that reporting unit using standard scientific statistical practices.

Basis the purchase information available with us in the mentioned time period, following results have been estimated (Source: Kantar, Worldpanel Division)

Oats Brands	Households (in 000s)	Penetration %	Purchase value captured by Household Panel (in million Rs)	Value Share %
	MAT Dec'23	MAT Dec'23	MAT Dec'23	MAT Dec'23
<b>ANY OATS</b>	21508	18.8%	6971	6971
<b>SAFFOLA OATS</b>	13298	11.6%	3134	45.0%
<b>QUAKER OATS</b>	6320	5.5%	2131	30.6%
<b>KELLOGGS OATS</b>	2436	2.1%	472	6.8%
<b>HORLICKS OATS</b>	141	0.1%	14	0.2%
<b>BAGRRY OATS</b>	987	0.9%	206	3.0%

Note: 1. Please note that the above information is provided to you as a subscriber of the above service and is for your internal use only. However, as an exception Kantar Worldpanel hereby grants limited permission to Marico India Pvt Ltd for dissemination of the said Purchase data for sales promotion and on the packs meant for retail sales.

2. Since this estimate has emerged from a sample survey, they are subject to statistical error.

3. This survey is a household level survey and does not take the single member homes as well as usages in hostels/ mess/ PG etc. into consideration.

The Data/figures reflected here are based on the monthly Data collection for Household Panel which are estimates derived from sample surveys and subject to the limits of statistical errors/rounding up or down.

5. This Data is based on survey done across centres / households and hence they may not be a true representation of the Universe.

6. Kantar, Worldpanel Division shall not be liable for any loss/ claim howsoever arising out of the Client's interpretation and inference of the Data / deliverables.

7. Marico India Pvt. Ltd. hereby agrees to indemnify Kantar, Worldpanel Division and its officers and directors, affiliates and subsidiaries against all actions, claims, costs, and damages (including all legal costs and expenses) either from client, its subsidiary, parent or affiliated companies and/or from any third parties arising from the rights granted under this Claim letter)

8. This claim letter is valid up to 31st December 2024

With kind regards,

Yours sincerely,  
For Kantar, Worldpanel Division

**Manoj K Menon**  
Director Commercial  
Kantar Worldpanel Division

**Confidential Internal Only - Amber**