

India Watch Industry Outlook to 2018 - Premium Segment and Online Retail to Lead the Growth

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Abstracts

The report titled 'India Watch Industry Outlook to 2018 – Premium Segment and Online Retail to Lead the Growth' provides a comprehensive analysis of the various aspects such as market size, segmentation, trends and developments and future projections of the mass, mid and premium price wrist watches as key segments of the market. The report provides the market share of the major brands and company profiles of key players/ brands in all the major segments (mid, affordable luxury, luxury and super luxury) The report also covers the online watch industry and wall clock segment in India and provides market size and future projections of economy, mid and premium price wall clocks as three segments of the wall clock industry in the country.

The Indian watch market for timepieces has grown at a rapid pace in the past few years clocking a CAGR of 9.3% for the period FY'2008-FY'2013. The market for timepieces includes wrist watches, table clocks, alarm clocks and wall clocks. But the market for wrist watches formed the major proportion of the market for time pieces with a contribution of about 89% in the total watch market in the country by revenue while the market for wall clocks formed the rest of the market share of 11% in FY'2013.

The wristwatch market has grown in terms of value from INR 33,731.0 million in FY'2008 to INR ~ million in FY'2013. The wrist watches market in India can be classified into three broad categories based on price. The first is the mass price segment consisting of watches priced lower than INR 1,000 which are mainly the wrist watches sold by the unorganized players. The second category is the mid price segment of watches priced between INR 1,000 and INR 10,000. The third is the premium watch segment with watches priced above INR 10,000.

In India, the mass segment of watches contributes the highest to the market in terms of

volume. On the other hand, in terms of value, each of the mass and the mid price segments contribute about 37%-38% to the total wristwatch market in India. The rest is contributed by the premium segment which constitutes around 25% of the INR ~ million wristwatch industry in India.

The premium wrist watch market has been the fastest growing segment in the Indian wrist watch industry during FY'2008-FY'2013. As the size of the population with high disposable income has increased significantly over the past years, the demand for luxury goods have substantially increased in the country. The premium segment wristwatch market in India can be further subdivided into three price categories. In value terms, the Affordable luxury wristwatch segment has the highest market share of about 44% in the premium wristwatch market in India. The main consumers of this segment of watches are the rising urban population with higher spending capacity. This segment is expected to more than double from about ~ million in FY'2013 to about ~ million in FY'2018 by experiencing a high growth at a CAGR of 23.3 % in the period FY'2014-FY'2018.

The luxury segment is the premium wrist watch segment which includes wrist watches priced between INR 0.1 million and INR 1.0 million. Rolex is the leading brand in this segment and accounts for ~% of the watch sales. This is followed by Swatch Group owned Omega which contributes ~% to the affordable luxury segment. Rado again owned by Swatch Group is the fourth largest selling brand and accounts for ~% of the volume sales of the luxury watch segment in India. The super luxury segment is also expected to experience a significant increase in the value on account of rise in the number of billionaires in the country in coming years. This market is expected to grow at a CAGR of about 16.7% in the period FY'2013-FY'2018. The market will grow from INR ~ million in FY'2014 to about INR ~ million in FY'2018.

The online retail in India has expanded tremendously in recent years. This growth has also been witnessed in the wristwatch segment of the online retail. The primary reason behind the huge growth of the online retail market for wrist watches is the huge increase in the number of internet users in the country owing to the rising internet penetration. In FY'2013 the online retailer market for wrist watches was characterized by a few e-commerce websites holding around 92.0% of the market share in the online retail wristwatch segment. The market is majorly dominated by the five e-commerce players Snapdeal, Flipkart, Watchkart, Jabong and Myntra. The online retail market for wrist watches is expected to clock a CAGR of 54.0% for the period FY'2013-FY'2018. The size of the wristwatch segment of online retail is expected to grow from around INR ~ million in FY'2013 to about INR ~ million in FY'2018.

The wall clock industry in India has grown from about INR 4,188.0 million in FY'2008 to INR ~ million in FY'2013. The growth in market in the value terms is mainly driven by sales of the wall clocks brands such as Ajanta, Sonera Industries, Opal, Sonam Quartz and Samay. The premium wall clock segment is the fastest growing segment in the wall clock market in India and has grown at a CAGR of 12.3% in the period FY'2008-FY'2013.

KEY TOPICS COVERED IN THE REPORT

The market size of the India watches industry by value.

The market segmentation of the watches industry by wrist watches and wall clocks.

The market size and future projections of the wrist watch market in India by value.

Market segmentation of the wrist watch market on the basis of price.

Market size and future projections of the mass, mid and premium price wrist watch segments.

Market share of major players in the mass, mid and premium price wrist watch segments.

Market shares of major players in affordable luxury segment and major brands in luxury and super luxury premium watch segments on the basis of unit sales.

Market share of major players in the overall India wrist watch market on the basis of revenue.

Trends and developments in the wrist watch market in India.

Market size and future projections of the wall clock industry in India by value.

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