+44 20 8123 2220
info@marketpublishers.com

# Analyzing the Indian Retail Industry

https://marketpublishers.com/r/ABFC7418C2EEN.html
Date: June 2011
Pages: 400
Price: US$ 450.00 (Single User License)
ID: ABFC7418C2EEN

## Abstracts

The globalization of the Indian Economy has brought forward a change in the Indian consumerism psyche with the consumer becoming more aware of his/her value of money strength and their economic purchasing power becoming more evident than in the previous generations. The concept of product quality and service delivery which were earlier not very engraved in the consumer psyche are now very much demanded and delivered for in the new age format of organized product retailing in the Indian consumer goods market.

These changes have led to the overall increase of professionalism in the service delivery as well as the consumer purchase patterns shifting from “need only” based to “extended storage-based bulk purchase characteristics.

These have led to the entry and expression of interest by many global retail majors in the Indian organized retail market wherein many products and services are offered to the same consumer at the same location which present multiple attractions to their monthly disposable incomes. The middle class has been a leading adaptor of this change process by its changing lifestyles, strong income growth and changing demographic patterns which are placing the growth projections for this industry comfortably at 25% annually.

Today, synergies based on huge consumer bases developed in unrelated industries like telecom to retail are being seen in the Indian market as the combined purchase affinity of the middle class far outstrips the specialist purchase patterns of the higher income strata in the Indian sub continent; with the industry projected to become a US$175-200 billion business by 2016 and the economy playing a comfortable upswing role, the competition in the marketplace is expected to be fierce.

The present scenario of the industry is focused on forward buying of retail real estate in

+44 20 8123 2220
info@marketpublishers.com

order to reap balance sheet advantages later in the business cycle and also rapid ramping of operations in presently operating outlets in order that the loyalty purchase habits of consumers are built over a period of time before the world majors enter the market with deeper pockets and buying power.

The Asian retailers are not willing to give in an easy competitive fight on their home turf as well as the smart small time mom & pop store retailer known as the “kirana store” in India is also wizening up to the challenge and building personal relationships apart from increasing the service spectrum like never before.

The market in all seems to be ready for a big explosion of intense competitive activity over ridden by social and economic considerations which will make it one of a kind business study in the corporate universe as an economy which did not open up till the early 1990’s where in the industry was dominated by unorganized retailer till then and any kind of central purchase or retail formats where only propagated by the government for which the awareness as well as effort were low.

Aruvian's R'search’s report – Analyzing the Indian Retail Industry 2007 - on the Indian Retail Industry is an in-depth and comprehensive cross industry review on the Indian Retail Industry which explores the macroeconomic scenario of Indian economy which coupled with growth of GDP led to the shift of consumer purchase patterns and the build up confidence in the retail sector thereby giving shape to the government allowance for FDI in the Indian retail sector.

The report provides an overview of the industry along with the investment inflow in the industry which has also been channelized into the rural sector in India by some of the players. The report also attempts to place an estimate on the volume of the unorganized retail sector of India in comparison to the overall industry size.

This report follows the changing consumer preferences of the Indian buyer along with the gender driven increase of purchasing power which has taken a different hue among the marketers which are now forced to look at them as an important purchase group and drawing marketing promotions budgets accordingly. The report also envisages to explain the role of the media in influencing the Indian retail market as well as the emergence of luxury brands in the consumer psyche.

The report applies the PEST & Porter’s Five Forces Strategy Analysis to this dynamic industry which helps to bring out the characteristics of this industry and the forces driving investment infusion or competitor activity in this industry.

+44 20 8123 2220
info@marketpublishers.com

An in-depth explanation of the industry retail formats segregation is also provided in this report which also comprises of the study of the important regional retail contributors in this sector which are known for either their long standing in the market or any kind of specialty product retail developed over the years, which has differentiated them for the overall market. The report also compares this with the early development of organized retail by the Indian players and the coupled emergence of the multi-format retail in India.

The recent trends of jumbo sized retailers establishing themselves as super saver locations in the consumer psyche and consumer acceptance of these stores as discount destinations are also explained in this report. The role of e-commerce-based retail though small in volumes but important in terms of growth is also elaborated in this report along with a profiling of the major players in this market.

Rural Retailing is elaborated in this report in detail wherein the doubled up sourcing to selling cycles are explained in this report wherein the report also takes up the example of some of the successful rural retail ventures of the Indian market most financed by traditional business houses in India and some of the ventures which also did not succeed in the Indian rural market.

A contrasting view of the growth of luxury brands in the Indian market is also explained in this research report wherein the increased consumerism is apparent in the stupendous increase in sales of apparels, lifestyle products etc which have started to carve a profit making niche for themselves as also the trends apparent in these products are elaborated in this report.

The factors powering growth and the contesting issues are explained in this report in a macroeconomic scenario wherein the growth opportunities are compared with the issues which are process either legal or union or even logistics oriented. The report also examines the potential development areas in the retail market in India.

The process or entry options for FDI into Indian retail industry are examined in comparison to the challenges faced by the entrants in the sector to drive investment into the India market. The report presents some case studies on this crucial issue as well as the further options which are available and the possible role that can be played by private equity contributors.

Further, the report draws a profile of the Global Retail Industry and some of the major global players across the world. India’s position in the global retail scenario is also

+44 20 8123 2220
info@marketpublishers.com

explained in this report.

Retail not being limited to only consumer goods is further explored in this report in the books music and gift retail industry which have picked up pace in transforming from being isolated businesses to being integrated retail locations for all these products which have received good consumer response as explained in this report by way of analysis of the leading participants in this Industry.

Food being a major driver of retail consumption globally has also seen growth and entry of various global fast food chains into India backed by slowly building weekend spending patterns in the metros as well as acceptance of these food habits in the Indian palette. The major industry contributors in this sector are analyzed by this report.

The report further analyses the retail push in areas like Fashion Apparel, Consumer Electronics, Entertainment Retail, Eyewear Retail, Fitness & Personal Care, Food & Grocery Retail, Footwear Retail, Fuel & Forecourt Retail, Health & Pharmaceutical Processes, Home & Office Furniture Furnishings Retail, Jewelry Retail, Telecom Retail, and Timewear Retail.

The report further provides the future perspective of the Indian retail industry which is set to boom and present huge opportunity or renewed growth cycles to the world majors of retail who now look at India as a future destination which will sustain and lead new revenue opportunities.

+44 20 8123 2220
info@marketpublishers.com

# Contents

Executive Summary

Section 1: Introduction

**A. INTRODUCTION TO THE INDIAN MACROECONOMIC SCENARIO**

A.1 Overview
A.2 Growth of GDP
A.3 The Shifting Trends in Spending of the Indian Consumer

**B. INTRODUCTION TO THE INDIAN RETAIL INDUSTRY**

B.1 Market Overview
B.2 Investments in the Industry
B.3 Transformation of the Indian Retail Industry
B.4 The Emergence of Rural Retailing in India
B.5 Introduction of FDI in the Sector
B.6 Estimating the Industry Size
B.7 Impact of the Indian Economy on the Retail Industry
B.8 A Brief Profile of the Indian Unorganized Retail Industry

Section 2: Analyzing Trends & Frameworks

**A. ANALYZING CONSUMER & CONSUMPTION TRENDS IN THE INDIAN RETAIL SECTOR**

A.1 Changes in Consumer Lifestyle
A.2 Looking at the Cycle of Retail Induced Growth
A.3 Importance of Food & Grocery Retail for Rural Areas
A.4 Working Women Boosting Retail Consumption
A.5 Preference of Luxury by Consumers
A.6 Easy Availability of Finance
A.7 Consumer Preference for Real Value Products
A.8 Altering Demographics
A.9 Emergence of ‘Eco-Fashion’
A.10 Organized Retail & Growing Consumer Spending
A.11 Emergence of Luxury Brands

+44 20 8123 2220
info@marketpublishers.com

A.12 The Changing Landscape of Franchising
A.13 The Important Role Media Plays in the Retail Industry

**B. PEST FRAMEWORK ANALYSIS OF THE INDIAN RETAIL INDUSTRY**

B.1 Political Aspects
B.2 Economic aspects
B.3 Social Aspects
B.4 Technological Aspects

**C. PORTER'S FIVE FORCES STRATEGY ANALYSIS OF THE INDIAN RETAIL INDUSTRY**

C.1 Bargaining Power of Buyers
C.2 Bargaining Power of Suppliers
C.3 Competitive Rivalry in the Industry
C.4 Threat of New Entrants
C.5 Threat of Substitutes
C.6 Conclusion

Section 3: Understating the Industry Structure

**A. MAJOR RETAIL FORMATS**

A.1 Convenience Stores
A.2 Department Stores
A.3 Discount Stores
A.4 Hypermarkets
A.5 Kiosks & Food Court Counters
A.6 Specialty Stores
A.7 Supermarkets

**B. LOOKING AT THE BIG REGIONAL RETAIL CONTRIBUTORS**

B.1 Section Synopsis
B.2 Benzer
B.3 Charag Din
B.4 Deepam Silks
B.5 Diwan Saheb

+44 20 8123 2220
info@marketpublishers.com

B.6 Mohanlal Sons
B.7 Pitambari
B.8 PN Rao
B.9 Pothys
B.10 Sohum Shoppe
B.12 The Chennai Silks

## C. LOOKING AT THE EMERGENCE OF DEPARTMENT STORES

C.1 Section Synopsis
C.2 Ebony
C.3 Globus
C.4 Lifestyle
C.5 Pantaloons
C.6 Piramyd
C.7 Shoppers' Stop
C.8 Westside
C.9 Analyzing the Growth Momentum of the Department Stores

## D. LOOKING AT THE EMERGENCE OF MULTI-FORMAT RETAILERS IN INDIA

D.1 Bharat Petroleum Corporation (In & Out)
D.2 K. Raheja Corporation Group
D.3 Lifestyle International
D.4 Nilgiri's
D.5 Pantaloon Retail
D.6 Piramyd Retail
D.7 Reliance Retail
D.8 RPG Retail
D.9 Subhiksha
D.10 The Tata Group
D.11 Trinethra
D.12 Vishal Retail Group

## E. LOOKING AT BIG VALUE RETAILERS

E.1 Section Synopsis
E.2 Big Bazaar
E.3 Hypercity

+44 20 8123 2220
info@marketpublishers.com

E.4 Jumbo Saver
E.5 Metro Cash & Carry
E.6 Spencer's Hyper
E.7 Vishal Mega Mart
E.8 Others

**F. LOOKING AT GROWING ACCEPTANCE FOR DISCOUNT STORES & FACTORY OUTLETS**

F.1 Section Synopsis
F.2 Brand Factory
F.3 Globus Factory Outlet
F.4 Max Retail
F.5 Megamart
F.6 My Dollar Store
F.7 The Loot
F.8 The Shoe Factory
F.9 Welspun Factory Outlet

**G. RISING POPULARITY OF NON-STORE RETAIL OPTIONS**

G.1 Internet Retail Format
G.2 Looking at Mobile Commerce
G.3 Online Advertising
G.4 Developing the Concept of E-Tailing
G.5 Major Online Players
G.6 Challenges Facing this Segment

**H. EMERGENCE & THE GROWING POPULARITY OF RURAL RETAILING**

H.1 Section Synopsis
H.2 DCM Hariyali Kisaan Bazaar
H.3 Godrej Aadhar
H.4 ITC Choupal Saagar
H.5 Tata Kisan Sansar
H.6 Others

**I. GROWTH OF LUXURY RETAILING**

+44 20 8123 2220
info@marketpublishers.com

I.1 Accessories
I.2 Automobiles
I.3 Electronics
I.4 Fashion Apparel
I.5 Health
I.6 Jewelry
I.7 Lifestyle Magazines – The Luxury Publications
I.8 Mobile Phones
I.9 Sports
I.10 Travel
I.11 Trends to Watch For
I.12 Summing Up

Section 4: Analyzing Progression Drivers & Issues in the Industry

**A. PRIMARY GROWTH FACTORS IN THE INDIAN RETAIL SECTOR**

A.1 Real Estate Boom
A.2 Altering Demographics
A.3 Emergence of Retail Technology & E-Commerce
A.4 Flexibility of Retail Segments
A.5 High-End Fashion at a Reasonable Reach
A.6 Macroeconomic Modifications
A.7 Summing Up

**B. BARRIERS & ISSUES FACING THE INDIAN RETAIL SECTOR & POTENTIAL AREAS FOR DEVELOPMENT**

B.1 Availability of Skilled Manpower
B.2 Retail Schooling
B.3 Adaptation of High End Technology
B.4 IT's Role in Retail Safety
B.5 Retail Logistics
B.6 Developing Retail Destinations
B.6.1 Current Lucrative Destination Malls
B.6.1.1 Cross River Mall & Environs
B.6.1.1 Inorbit Mall & Environs
B.6.1.1 MGF Metropolitan Mall & Environs
B.6.1.1 The Forum & Environs

+44 20 8123 2220
info@marketpublishers.com

B.6.1.1 The Forum Kolkata & Environs
B.6.2 Current Lucrative Avenues
B.6.2.1 100 Feet Road, Indiranagar, Bangalore
B.6.2.2 Camac Street & Sarat Bose Road, Kolkata
B.6.2.3 Sealing of Lucrative Avenue Spaces in Delhi & NCR
B.6.3 Other Lucrative Retail Spaces
B.7 Summing Up

Section 5: Flow of Capital Investment in the Industry

**A. INFUSION OF CAPITAL IN THE INDIAN RETAIL SECTOR**

A.1 Section Synopsis
A.2 Options for Attaining Funds
A.3 FDI in the Sector
A.4 Looking at Bank/Debt Finance
A.5 Looking at Venture Funding
A.6 Looking at the Equity Issue Option
A.7 Analyzing the Need for an IPO

**B. CHALLENGES & OPPORTUNITIES IN TERMS OF INVESTMENT**

B.1 The Competitive Edge
B.2 Limited Options for Investors
B.3 Analyzing through Case Studies
B.3.1 Koutons Retail
B.3.2 Pantaloon Retail
B.3.3 Provogue India
B.3.4 Shopper’s Stop
B.4 Further Developing Financing Options in the Industry
B.5 The Role of Private Equity Contributors

Section 6: A Brief Profile of the Global Retail Industry

**A. GLOBALIZATION OF THE RETAIL INDUSTRY WORLDWIDE**

**B. INDIA IN THE GLOBAL SCENE**

**C. THE MAJOR INDUSTRY CONTRIBUTORS WORLDWIDE**

+44 20 8123 2220
info@marketpublishers.com

C.1 Aeon Co.
C.2 Albertsons, Inc.
C.3 Aldi
C.4 Carrefour SA
C.5 Costco Wholesale corporation
C.6 Groupe Auchan SA
C.7 Koninklijke Ahold N.V.
C.8 Lowe’s
C.9 Rewe-Zentral AG
C.10 Safeway, Inc.
C.11 Schwarz Unternehmens KG
C.12 Sears, Roebuck & Co.
C.13 Target Corporation
C.14 Walgreen Co.
C.15 Wal-Mart Stores, Inc.

Section 7: Analyzing the Various Retail Segments

**A. LOOKING AT BOOKS, MUSIC, & GIFT RETAIL**

A.1 Section Synopsis
A.2 Major Contributors in Book Retail
A.2.1 AH Wheeler & Company
A.2.2 Book Caf?
A.2.3 Bookworm
A.2.4 Crossword
A.2.5 Fountainhead
A.2.6 Granth
A.2.7 Higginbothams
A.2.8 Landmark
A.2.9 Odyssey
A.2.10 Om Book Shop
A.2.11 Oxford Bookstore
A.2.12 Sankars
A.2.13 Teksons Bookshop
A.2.14 Wordsworth
A.2.15 Others
A.3 Major Contributors in Music Retail

+44 20 8123 2220
info@marketpublishers.com

A.3.1 Music World
A.3.2 Planet M
A.3.3 Others
A.4 Major Contributors in Gifts & Stationeries
A.4.1 Archies
A.4.2 Ferns ‘N’ Petals
A.4.3 Others

## B. LOOKING AT CATERING SERVICES RETAIL

B.1 Section Synopsis
B.2 Major Industry Contributors
B.2.1 Barista
B.2.2 Baskin Robbins
B.2.3 Caf? Coffee Day
B.2.4 Comesum
B.2.5 Dominos
B.2.6 Jumbo King Vada Pav
B.2.7 McDonald’s
B.2.8 Pizza Corner
B.2.9 Pizza Hut
B.2.10 Pulse Foods

## C. LOOKING AT APPARELS & FASHION ACCESSORIES RETAIL

C.1 Section Synopsis
C.2 Apparel Retail Formats
C.3 Analyzing the Indian Apparel Sector
C.4 Trends in Apparel & Fashion Accessories Retail
C.5 Impact on the Sector of Changing Consumer Lifestyles
C.6 Exploring the Potential of Growth for the Sector
C.7 Issues, Challenges & Future Opportunities

## D. LOOKING AT CONSUMER ELECTRONICS RETAIL

D.1 Section Synopsis
D.2 Market Structure
D.3 Major Industry Contributors & Retailers
D.3.1 Bang & Olufsen

+44 20 8123 2220
info@marketpublishers.com

D.3.2 Bose
D.3.3 Canon
D.3.4 HCL
D.3.5 LG Shoppe
D.3.6 Next
D.3.7 Nokia
D.3.8 Samsung
D.3.9 Sony World
D.3.10 Vasanth & Company
D.3.11 Vivek's
D.3.12 Emergence of New Players
D.4 Challenges & Issues

## E. LOOKING AT ENTERTAINMENT RETAIL

E.1 Section Synopsis
E.2 Major Industry Contributors
E.2.1 Adlabs Cinema
E.2.2 Fun Republic
E.2.3 Inox
E.2.4 M2K Cinemas
E.2.5 PVR Cinemas
E.2.6 Pyramid Saimira Theatre
E.2.7 Shringar Cinemas
E.2.8 World Space Radio
E.2.9 Xbox 360
E.2.10 Zapak

## F. LOOKING AT EYEWEAR RETAIL

F.1 Section Synopsis
F.2 Major Retailers & Industry Contributors
F.2.1 Bausch & Lomb
F.2.2 Fastrack
F.2.3 GKB Opticals
F.2.4 Himalaya Opticals
F.2.5 Lawrence & Mayo

## G. LOOKING AT FITNESS & PERSONAL CARE RETAIL

+44 20 8123 2220
info@marketpublishers.com

G.1 Section Synopsis
G.2 Sector Trends
G.3 Major Industry Contributors
G.3.1 Ayush Therapy Centers
G.3.2 Beauty Concept
G.3.3 Health & Glow
G.3.4 Kaya Skin Clinic
G.3.5 Lakme Beauty Salons
G.3.6 The Body Shop
G.3.7 Vandana Luthra Care Centre
G.3.8 Others

## H. LOOKING AT FOOD AND GROCERY RETAIL

H.1 Section Synopsis
H.2 Factors Driving Growth & Change in the Food & Grocery Segment
H.3 Barriers in the Sector
H.4 Major Industry Contributors
H.4.1 Arambagh Foodmart
H.4.2 Fabmall
H.4.3 Food Bazaar
H.4.4 Foodworld
H.4.5 Namdhari’s Fresh
H.4.6 Nilgiri’s
H.4.7 Reliance Fresh
H.4.8 Spencer’s Retail
H.4.9 Subhiksha
H.4.10 Trumart

## I. LOOKING AT FOOTWEAR RETAIL

I.1 Section Synopsis
I.2 Looking at the Fast Growing Branded Sports Footwear Sub-sector
I.2.1 Major Industry Contributors
I.2.1.1 Adidas
I.2.1.2 Nike
I.2.1.3 Reebok
I.3 Major Contributors in the Indian Footwear Retail Sector

+44 20 8123 2220
info@marketpublishers.com

I.3.1 Bata
I.3.2 Khadims
I.3.3 Liberty
I.3.4 Metro Shoes
I.3.5 M&B Footwear

## J. LOOKING AT FORECOURT & FUEL RETAIL

J.1 Section Synopsis
J.2 Forecourt Retailing
J.2 Trends & Opportunities in the Segment
J.3 Fuel Retail
J.4 Overview
J.5 Major Industry Contributors
J.5.1 Bharat Petroleum Corporation Ltd.
J.5.2 Hindustan Petroleum Corporation Ltd.
J.5.3 Indian Oil Corporation
J.5.4 ONGC
J.5.5 Reliance Petroleum Ltd.
J.5.6 Global Players

## K. LOOKING AT HEALTH & PHARMACEUTICAL RETAIL

K.1 Section Synopsis
K.2 Emergence of Differentiated Retail Strategies in Pharma Retailing
K.3 The Indian Pharmaceutical Industry – A Look at the Future
K.4 Major Industry Contributors
K.4.1 Apollo Clinic
K.4.2 Apollo Pharmacies
K.4.3 Guardian Lifecare
K.4.4 Himalaya Drugs
K.4.5 Lifeken Medicines
K.4.6 Medicine Shoppe
K.4.7 Trust Chemicals & Druggists
K.5 Challenges & Issues

## L. LOOKING AT HOME & OFFICE FURNITURE & FURNISHINGS RETAIL

L.1 Section Synopsis

+44 20 8123 2220
info@marketpublishers.com

L.2 Major Industry Contributors
L.2.1 @Home
L.2.2 Atmosphere
L.2.3 Fabindia
L.2.4 Godrej Interio
L.2.5 Godrej Lifespace
L.2.6 Home Centre
L.2.7 Home Stop
L.2.8 Just Linc
L.2.9 Kajaria Tiles
L.2.10 Office 1 Superstore
L.2.11 Office Linc
L.2.12 Pergo
L.2.13 Portico
L.2.14 Seasons Furnishings
L.2.15 Spaces Home & Beyond
L.2.16 Style Spa
L.2.17 The Home Store
L.2.18 TTK Prestige
L.2.19 Others
L.3 Challenges & Issues

## M. LOOKING AT JEWELRY RETAIL

M.1 Section Synopsis
M.2 Major Industry Contributors
M.2.1 Carbon
M.2.2 D'Damas
M.2.3 Damas
M.2.4 Intergold
M.2.5 Kiah
M.2.6 Orra
M.3 Major Regional Players
M.4 Challenges & Issues

## N. LOOKING AT TELECOM RETAIL

N.1 Section Synopsis
N.2 Major Service Providers

+44 20 8123 2220
info@marketpublishers.com

N.2.1 Airtel
N.2.2 BPL Mobile
N.2.3 Hutch
N.2.4 Idea Cellular
N.2.5 Reliance Mobile
N.2.6 Spice
N.2.7 Tata Indicom

**O. LOOKING AT TIMEWEAR RETAIL**

O.1 Section Synopsis
O.2 Major Industry Contributors
O.2.1 Fossil
O.2.2 Longines
O.2.3 Movado
O.2.4 Omega
O.2.5 Rado
O.2.6 Timex
O.2.7 Titan
O.3 Major Retailers
O.3.1 Ethos
O.3.2 Johnson Watch & Company
O.3.3 Prime Watch World

Section 8: The Future of the Indian Retail Industry

**A. INDIAN RETAIL INDUSTRY: FUTURE PERSPECTIVE**

Section 9: Conclusion

**A. APPENDIX**

**B. GLOSSARY OF TERMS**

+44 20 8123 2220
info@marketpublishers.com

## I would like to order

Product name: Analyzing the Indian Retail Industry
Product link: https://marketpublishers.com/r/ABFC7418C2EEN.html
Price: US$ 450.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:
info@marketpublishers.com

## Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page https://marketpublishers.com/r/ABFC7418C2EEN.html

## To pay by Wire Transfer, please, fill in your contact details in the form below:

First name:
Last name:
Email:
Company:
Address:
City:
Zip code:
Country:
Tel:
Fax:
Your message:

**All fields are required

Custumer signature _____

Please, note that by ordering from marketpublishers.com you are agreeing to our Terms & Conditions at https://marketpublishers.com/docs/terms.html

To place an order via fax simply print this form, fill in the information below and fax the completed form to +44 20 7900 3970