

# Analyzing the Indian Retail Industry

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## 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

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 wizinging 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.

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

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.

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