

BMI India Retail Report Q2 2011

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Abstracts

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The Q211 BMI India Retail Report forecasts that total retail sales will grow from INR19.0trn (US\$395.96bn) in 2011 to INR30.23trn (US\$785.12bn) by 2015. Strong underlying economic growth, population expansion, the increasing wealth of individuals and the rapid construction of organised retail infrastructure are key factors behind the forecast growth.

As well as an expanding middle and upper class consumer base, there will also be opportunities in India's second- and third-tier cities. The greater availability of personal credit and a growing vehicle population providing improved mobility also contribute to a trend towards annual retail sales growth of 12.2%. Tourism is also a major contributor to the Indian retail sector. Tourist arrivals rose by 9.3% in 2010 to 5.58mn, from 5.11mn in 2009. Foreign exchange earnings from tourism during 2010 were US\$14.19bn, up 24.6% from US\$11.39bn the year before.

India's nominal GDP is forecast at US\$1.76trn in 2011. Average annual GDP growth of 8.1% is predicted by BMI through to 2015. With the population expected to increase from 1.19bn in 2011 to 1.25bn by 2015, GDP per capita is forecast to more than double by the end of the forecast period, reaching US\$3,027.

The growth in the overall retail market will be driven largely by the explosion in the organised retail market. Domestic retailers such as Reliance Retail and Pantaloon Retail continue to invest heavily in increasing their store networks and improving in-store offerings, and the impact they have on growth will be boosted by the arrival of expansion-orientated multinationals.

Reliance Retail is looking to invest up to INR1.5bn (US\$33mn) in 150 new stores by

March 2011, adding to its existing 1,050-store network. CEO Bijou Kurien said: 'Now that the recession is over, several new and stalled projects will get started. We would focus on both value retail as well as specialty, non-food retail stores.'

Mass grocery retail (MGR) sales in India are expected to undergo enormous growth over the forecast period. BMI predicts that sales through MGR outlets will increase by 218% to reach US\$27.67bn by 2015. This is a consequence of India's dramatic, rapid shift from small independent retailers to large, modern outlets, although it must also be noted that this growth is forecast to come from a very low starting point.

BMI forecasts consumer electronic sales at US\$29.14bn in 2011, with over-the-counter (OTC) pharmaceutical sales at US\$2.30bn. The former sub-sector is expected to show growth of 66.8% between 2011 and 2015, reaching US\$48.61bn, with projected double-digit growth of key products such as notebooks, mobile handsets and TVs. OTC pharmaceuticals, meanwhile, should increase more, by 106.9% throughout the forecast period, to reach US\$4.75bn.

Retail sales for the BMI universe of Asian countries in 2011 are a forecast US\$3.05trn. China and India are predicted to account for nearly 91% of regional retail sales in 2011, and by 2015 their share of the regional market is expected to be almost 93%. Growth in regional retail sales for 2011-2015 is forecast by BMI at 75.2%, an annual average 14.9%. India should experience the most rapid rate of growth, followed by China. India's forecast market share of 13.0% in 2011 is expected to increase to 14.7% by 2015.

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