

# RIMAGES Retail

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**Retail Excellence**  
VP Harris, MD  
**Witco**  
Luggage Retailer is  
Going Places



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Raghav Somani  
Founder  
**Headphone Zone**  
India's First Headphones  
Retail Chain

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### THERE'S LIFE BEYOND THE METROS

Metros are not what they used to be any more – sky-high rentals, higher manpower costs, cut-throat competition and rampaging inflation are squeezing retailers, putting pressure on bottom lines. But many of them have realised that instead of crowding the metros, they should look at the vast market out there waiting to be tapped – the smaller towns and cities of India which already account for more than 70 percent of India's annual e-commerce business.

Many retailers who have dared to make the move have pleasantly been surprised by the results and the purchasing power of the Indians living beyond the metros. The break-even is much easier because of low costs and capital goes much further than in the big cities. Companies like Liberty Shoes have found that many times, their stores in tier II towns clock about as much sales as those in the metros.

The trick to success in smaller towns is to be aware of the different tastes and preferences of the customers and customize the product offerings and formats carefully after doing proper research of the catchment area. Our cover story this issue investigates the issue and discovers many retailers who are effectively leveraging the opportunity beyond the metros.

In a competitive landscape, it is essential for retailers to come up with new ideas and concepts to attract customers. A few months ago, India's first retail chain specializing in headphones kick-started operations in South India. Steered by a young entrepreneur, Raghav Somani, it has already opened four outlets in six months and now intends opening one each month for the rest of the year. Stay tuned for our future issues as we bring you more such interesting concepts and insights from the dynamic world of modern retail of India.



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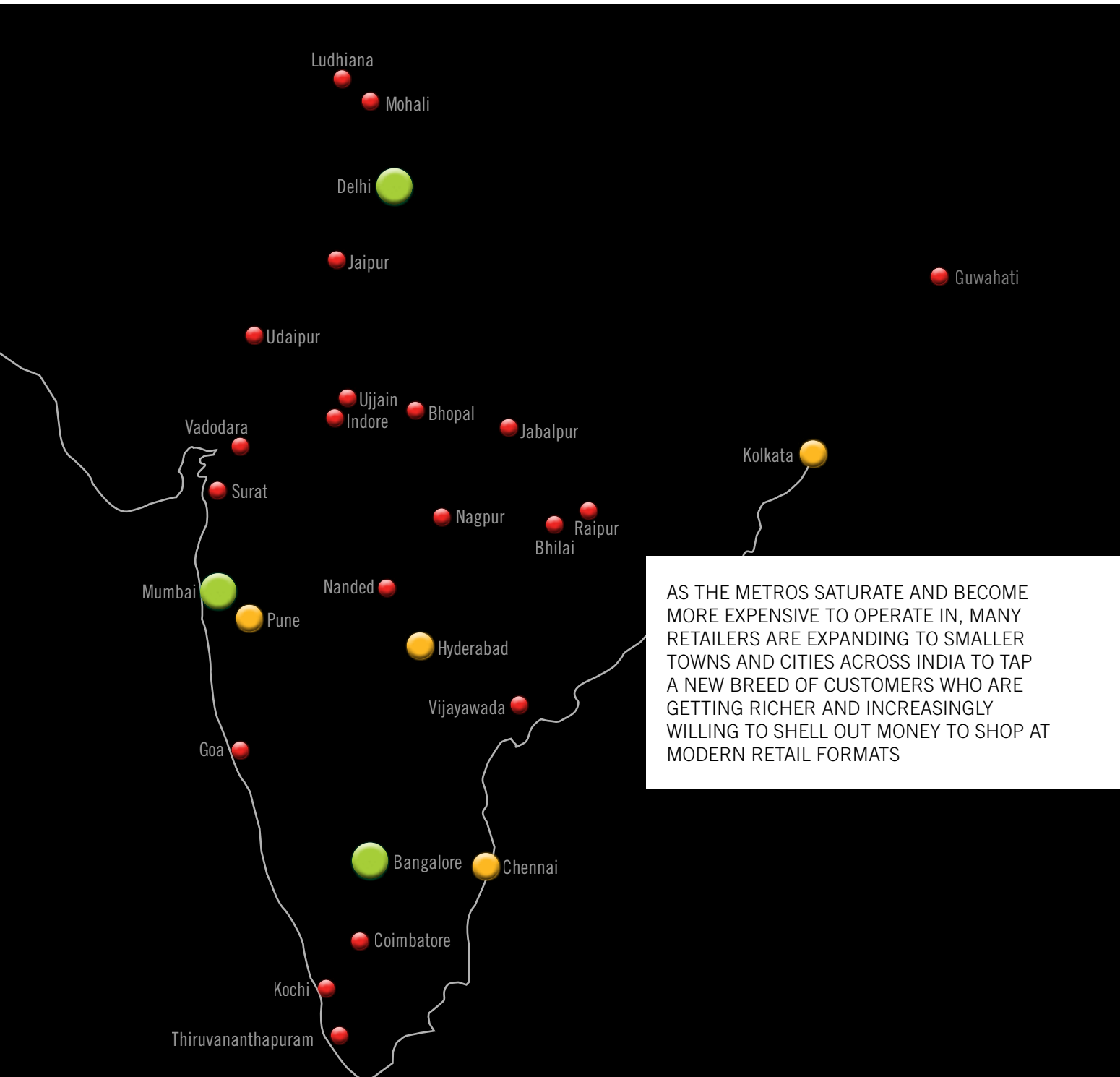
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# Beyond the Metros: Small Cities Big Opportunity

By Payal Kapoor



AS THE METROS SATURATE AND BECOME MORE EXPENSIVE TO OPERATE IN, MANY RETAILERS ARE EXPANDING TO SMALLER TOWNS AND CITIES ACROSS INDIA TO TAP A NEW BREED OF CUSTOMERS WHO ARE GETTING RICHER AND INCREASINGLY WILLING TO SHELL OUT MONEY TO SHOP AT MODERN RETAIL FORMATS

→ The modern retail revolution in India began in Delhi and Mumbai over one and a half decades ago and gradually spread to Hyderabad and Bangalore and other tier I cities of the country. These prominent locations offered clear advantages to retail chains: millions of potential consumers with solid purchasing power, high level of urbanisation, availability of quality retail real-estate, and good physical infrastructure. However, over the years, competition intensified and rentals and operational costs became very high, affecting the overall profitability of retailers. The result: many players have begun to seriously look at growth opportunities in smaller towns beyond the metros where the competition is less, rentals are still reasonable, salaries are comparatively low, and consumers have begun to prefer the sophisticated atmosphere of modern retail outlets over crowded bazaars.



Value formats are more suitable for smaller towns

Modern retail is expected to grow by a whopping 50-60 percent per annum in tier II and III cities of India over the next few years, compared to only 35 percent in tier I cities, research figures show. Clearly, the metro citizens are not the only ones aware of various brands, fast-food, and modern lifestyle – thanks to satellite TV and

inexpensive mobile phones, Bharat is today better connected with India, and smaller towns have got an evolving consuming class that aspires to be like the big-city consumers.

A recent Nielsen study confirms that the tier II cities are seeing a rapid rise in consumer spending. While the modern trade sector grew 28 percent in 2011 all over India, this was overshadowed by sales in modern retail stores in cities such as Jaipur, Indore, and Surat which grew by around 40, 39 and 27 percent, respectively. This trend of expansion of modern retail in smaller cities is going to strengthen in future, the Nielsen study says.

#### THE OPPORTUNITY

Modern retail activity is picking up in smaller cities and their contribution to the overall retail pie is growing quickly. Says Dheeraj Dogra, National Director (Retail) with BNP Paribas



Consumers in smaller cities look for value for money

Real Estate: “In 2005, the top six Indian cities accounted for 66 percent of the total modern retail in the country. In 2009 – in just a span of four years – their contribution got reduced to 47 percent. The contribution of tier II, III, and IV cities in India’s modern retail is growing at 20-25 percent every year.”

Industry watchers say the reason for this exponential growth is that people beyond the metros are slowly getting exposed to fashions and consumption trends of the metros, which is increasing their urge to spend. This is an opportunity waiting to be tapped by the modern retail chains, but to effectively do this, they need to re-orient their thinking.

Says Ashish Garg, MD of the discount chain Promart, who has decided to shun the metros in favour of smaller towns: “Most modern retailers have opened stores only in the metros, making the market over-crowded. But nobody is really focussing on the tier II, III, IV, V, and even VI cities. The non-metro towns too have huge purchasing power. I think modern retail chains are not reaching where there is huge untapped demand – they are just crowding the metros.”

Agrees Rakesh Pandey, President



Retailers need to carry out local promotional activities

(Retail and Business Development), Raymond: “While the tier I and II towns are attractive from the perspective of business expansion, accelerated growth can only be sustained by creating and developing markets in smaller towns.” Adds Anupam Bansal, Director of footwear maker Liberty Shoes: “In metros,

# Witco: Going Places

By Sanjay Choudhry

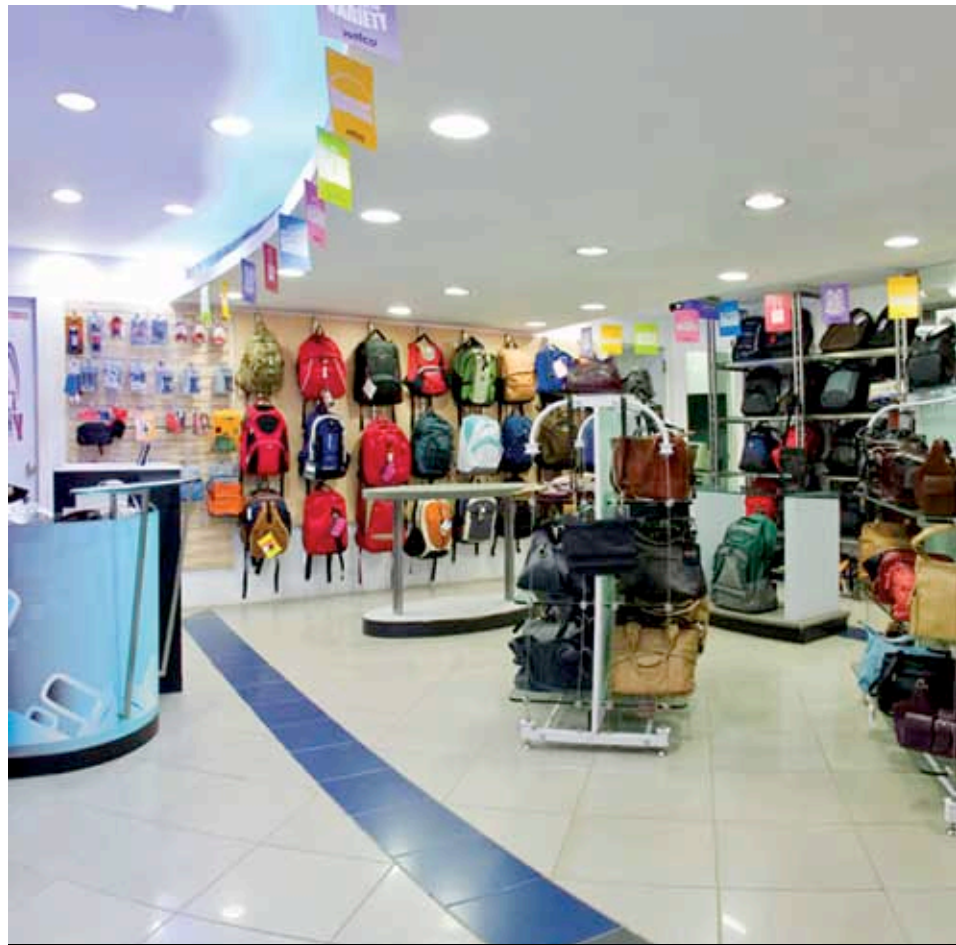
FOUNDED 60 YEARS AGO IN CHENNAI, WITCO IS ONE OF THE EARLY PIONEERS IN MODERN RETAILING OF LUGGAGE IN INDIA. HIT BY THE DOWNTURN OF 2008, THE COMPANY RE-INVENTED ITSELF TO FOCUS ON SMALLER STORES, RE-LAUNCHED ITS OWN PRIVATE LABEL, AND INCREASED SPACE FOR PERSONAL PRODUCTS. GROWING 15 PERCENT YEAR-ON-YEAR, IT IS NOW LOOKING TO EXPAND OUT OF SOUTH INDIA TO THE REST OF THE COUNTRY

→ The luggage market in India has been growing steadily over the past few years due to the increasing disposable income levels, a rise in air travel, the expanding number of retailers and speciality stores all over India, and luggage fast turning into a lifestyle product than something utilitarian. It is currently valued at ₹4,000 crore, growing at a CAGR of 15 percent. The modern market, standing at ₹1,800 crore, is dominated by a handful of players such as VIP and Samsonite.

One of the prominent modern retailers of luggage in India is the 60-year-old Witco, a South Indian specialty multi-brand chain that retails premium luggage, bags, and accessories. It currently has 15 outlets – 9 company-owned; the rest franchised – spread across Chennai, Bangalore, Kochi, and Kozhikode that showcase luggage brands from across the world under one roof. The company is led by its 53-year-old Managing Director VP Harris.

## HISTORY

Witco was founded in 1951 by the late MPC Mohamed, one of the pioneers of the plastic industry in Chennai. The



Based in South India, Witco is one of the oldest retail chains in the country for luggage and bags

firm called West India Plastic Trading Co was established in George Town, Madras, dealt in the wholesale and retail of plastic-ware, travel goods, and accessories. It was among the first brands in India to launch a portfolio of handcrafted luggage and bags under a trademark. The company grew over time to become one of the most trusted brands in the category – a fact which came out clearly when the Indian affiliate of Interbrand, Equitor, did a brand audit on Witco.

During the peak of the oppressive license Raj and the prohibitive tax regime with zero incentive for the

category by the government, Witco decided to exit manufacturing altogether and focus only on retail. Liberalisation of the economy brought new life to Witco but the decision to stay focussed exclusively on retailing continued.

A couple of large-format multi-brand stores ranging from 3,500 to 7,000 sq.ft. were commissioned in the early 1990s on Anna Salai Road and Usman Road, positioned as multi-level destination stores for luggage, bags, and accessories. These were followed with landmark stores at Anna Nagar, Adyar, Cathedral Road, and Mylapore.

### THE CONCEPT

Witco's positioning statement is: "Step out of Witco with the complete confidence of having purchased the most elegant and convenient travel accompaniments that meet your special requirements." Explains Harris: "The brand aims to empower



the Indian traveller to be 'travel-ready.' We have a vision to be India's leading travel goods retailer across all segments."

**True multi-brand:** According to the company, Witco is positioned to offer genuine multi-brand choice in each price band from the leading brands in the category. It also gives its opinion to customers on various features and attributes of each piece of luggage, and the sales team is trained not to influence them in favour of any brand. The company also offers supplier brands an automatic re-order system based on consumer response which works without any interference from the company management.

**Pre-selection:** In the present scenario of endless options and meaningless differentiation, customers are hard-pressed to make an intelligent choice. Witco saves its clientele time and effort by pre-selecting what is on offer at its stores.

**Informed choice:** The multi-brand and pre-selected offerings combined with shelf-talkers and a trained sales team result in equipping the buyer with all the inputs to make an informed choice on the ideal luggage solution for them.

**60-year heritage:** For decades, Witco has been helping people travel better with the solutions at its stores.

### PRODUCT RANGE

Witco offers premium luggage products and bags for a range of customers, from the daily commuter to the international traveller. The product categories include luggage,



VP Harris, Managing Director, Witco

travel bags, laptop bags, executive bags, backpacks, school bags, hand bags, and accessories.

Brands from all over the world make up the product mix. These include international brands such as Samsonite, Delsey, American Tourister, Case Logic, Nike, Puma, Fiorelli, Blues & Blues, and Gola and, while the Indian brands include names such as VIP, Sky Bag, Baggit, Hidesign, Wildcarft, Harrsions, and more.

The category split is 40 percent luggage and 60 percent personal products division (PPD). The luggage category has the largest ticket sizes, with prices ranging from ₹3,000 to ₹15,000, though the most popular price band is ₹3,000 to ₹8,000. The frequency of purchase of luggage among customers tends to be lower. In PPD, handbags, office bags, and backpacks have a very high growth potential. The ticket size tends to be lower in this than luggage, with prices ranging from ₹1,000 to ₹6,000, but the frequency of purchase is much higher and covers a large spectrum of consumers by age, work, and attitude. The most popular price band in PPD is ₹1,000 to ₹3,000.

The travel and personal accessories segment includes locks, passport holders, belts, wallets, travel adapters, and other travel necessities. This category overall gives a lifestyle element to the brand. Depending on the market conditions, there is a definite possibility for the Witco brand to expand into outdoors and trekking travel gear.



Brands from all over the world make up the product mix at Witco

# Grooming Future CEOs



Retailers in India need to train and groom their employees and prepare them for the next level

THE MOST IMPORTANT PART OF BUILDING ANY INDUSTRY IS THE CREATION OF CAPABILITY AS WELL AS CAPACITY. RETAILERS IN INDIA NEED TO INTRODUCE MANAGEMENT DEVELOPMENT PROGRAMMES TO GROOM ENTRY-LEVEL EMPLOYEES TO RISE THROUGH THE RANKS

By BS Nagesh

→ Indian modern retail has remained in its infancy for a long period now. The industry has grown in volume and value sales, but the contribution of modern retail to the overall retail hovers in the 5 percent range. The hard truth is that modern retail has not surpassed our country's consumption growth in a big way. At the same time, traditional retailers are expanding and modernising themselves. Modern retail has attracted a large share of media space as well as mindspace in the consulting practices – after

all, nobody can deny its benefits and positive contribution to the India growth story. Unfortunately, the politicians and the beaurocratic set-up of the country have not understood the impact modern retail can have on the Indian consumers and the economy. For strange reasons, modern retail in popular imagination has got associated with the FDI issue.

For me, the most important part of building any industry is the creation of capability as well as capacity. Both require government encouragement in terms of promoting and supporting

the industry and infrastructure planning. In the absence of such an enabling environment for modern retail, bright youngsters and working professionals would not consider it as an attractive career option.

The government's lack of action in developing modern retail has left retailers with no choice but to build the infrastructure and the entire business on their own and thus suffer the pangs of uncertainty and low profitability because retail is very capital intensive, whether for infrastructure or working capital.



learning

# Growth Drivers of Modern Retail

By SC Misra

THE OVERALL INDIAN RETAIL MARKET IS ESTIMATED TO BE AROUND \$428 BN, BUT MODERN RETAIL ACCOUNTS FOR ONLY 8 PERCENT OF IT. THIS, MORE THAN ANYTHING ELSE, UNDERLINES THE TREMENDOUS SCOPE FOR GROWTH IN MODERN RETAILING IN THE COUNTRY IN THE YEARS TO COME. THERE ARE A HOST OF FACTORS THAT ARE PROPELLING THE EXPANSION OF MODERN RETAIL IN INDIA, INCLUDING THE IMPROVING INFRASTRUCTURE, A MOVE AWAY FROM THE SOCIALISTIC PATTERN OF ECONOMY, BETTER EDUCATIONAL OPPORTUNITIES, AND RISING CONSUMERISM.

→ Over the last couple of decades, much has been written in the Indian media about modern retailing, but the term has never been defined. Of late, FMCG companies have begun to use the words “modern trade” to describe the industry. Here again, there is confusion. While a stand-alone supermarket chain in Mumbai gets treated as modern trade, supermarkets with monthly sales of ₹200 crore in Jalgaon or Jalna do not. Numerous such examples are found throughout India. To the common man, this distinction may matter little, except that modern trade sells things a little cheaper and offers many discounts and schemes, but it falsifies national data about the true extent of modern retail in the country.



Modern retail is increasingly becoming popular in India with consumers

Since many of the 140 lakh retailers of India would sooner or later like themselves to be recognised as modern retailers, they would want to know what exactly is modern retailing. The US Bureau of Labor Statistics defines modern retailing as a retail chain with 15 or more stores. In India, if a retailer follows a modern format, has a chain of stores, uses technology like computers, and employs college graduates in his working team, he can be said to be a modern retailer. Some may add one more point to this: the owner should not look into the routine day-to-day affairs of the business, leaving these to the professionals. In India, however, the HUF (Hindu Undivided Family) is widespread. There may be 15 adults in a joint Hindu, Muslim or Christian family, and they may all be involved in an owner-managed local retail chain. In fact, there are many such stores in the country.

Till recently, retailing in India was restricted to small entrepreneurs who were not very well educated. About 95 percent of shops in the country even today are less than 500 sq.ft. in size, with miniscule monthly sales. During the last two decades, however, many corporate companies have entered the Indian retail industry. The Ambanis, the Biyanis, the Jagtianies, the Tatas, and the Birlas have created millions of square feet of shop floors, with more coming up each day. Once FDI is allowed in multi-brand retailing, it will pave the way for global retail giants such as Walmart, Carrefour, Tesco, and Metro to enter India with far-reaching consequences.

What were the inhibiting factors earlier for modern retail in India and what are the growth drivers today merit consideration by the multitude of Indian retailers for their survival and growth. This much is sure though: most Indian retailers who do not adapt to the changing times will perish.

#### GROWTH DRIVERS

Listed below are some key drivers of growth in Indian modern retail:

**Infrastructure:** Just five or six decades ago, connectivity was a

big problem in India. Forget about villages, even cities were not connected by road as there were hardly any bridges straddling major rivers. Just about 100 of the 5,181 cities and towns of the country had electricity until 1950s. Things have since changed and are still changing fast. Express highways are being built

While a stand-alone supermarket chain in Mumbai gets treated as modern trade, supermarkets with monthly sales of ₹200 crore in Jalgaon or Jalna do not. Numerous such examples are found throughout India.

**IN 1957, MERELY 57 INDIANS WENT ABROAD AS TOURISTS WITH THEIR OWN MONEY! NOW, HUNDREDS OF THOUSANDS OF PEOPLE ARE VISITING OTHER COUNTRIES FOR SIGHTSEEING, EVEN FROM THE MIDDLE-CLASSES.**

Until some decades ago, well over half of the Indian population could not read and write. More than 50 percent of the districts had no colleges. Now, there are more than 1,600 management colleges in India. It today boasts of the biggest English-speaking population on the planet.

and all cities and towns got electrified long ago. Several states even claim that they have electrified every village within their borders! Though power shortages exist, things are improving quickly, with many states declaring themselves as electricity-surplus.

**Education:** Until some decades ago, well over half of the Indian population could not read and write. More than 50 percent of the districts in the country had no colleges. There was not a single engineering or medical college in several states and hardly one or two women colleges in each. Now, there are more than 1,600 management colleges in India which now boasts of the biggest English-speaking population on earth.

**Irrigation:** At independence, there was practically no irrigation in the country. Indian agriculture was almost totally dependent on the monsoon. There was an acute shortage of food grains. Without the grain aid of the USA and the UN, Indians would have starved. Now, irrigation has drastically improved. Agricultural inputs such as hybrid seeds and chemical fertilisers as well as farm loans are widely available. India is today the second biggest cultivator of rice and wheat in the world and the biggest producer of milk, fruits, and vegetables.



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**F & B:** Upsouth, Empire, Empire Juice Shop, Kailash Parbat, Pepsi, Rajdhani, Sbarro, Just Bake & Matka Kulfi, Beijing Bites, McDonald's, Subway, The Chocolate Room, Tiger Bay

**Fine Dining:** Kobe Sizzlers, Mainland China, Trader Vic's Mai-Tai Lounge, Toscano, Café Mangli, Café Noir, Chillis, Zafran

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