India Retail Supply Chain Study 2013

Opportunities, Challenges & The Path Ahead
Introduction

Organized retail has played a major role in driving the economy of developed nations and provides a lot of growth opportunities to developing nations. Several alterations are happening to the face of retail by way of government regulations, adoption of new technologies and evolving consumer needs. The allowance of Foreign Direct Investment in retail (FDI) has opened the doors to some of the world’s leading brands and companies. The growth of e-commerce has created both new competition and a new selling channel for retailers. This is bound to result in a shake-up of the landscape with the influx of new working processes, revamped distribution channels and new technologies that will redefine the way the organized retail will work in future. Some retail malls in cities like Ahmadabad and Pune are over retailed with average vacancy levels around 30 percent. Retailers have become cautious, while expanding with a strong focus on store profitability and thus closing down stores which are unviable or undertaking resizing exercises to make them viable in the near future. The sentiment therefore among the Indian retailers is to gear up to the tough competition.

This study, in which 50 major retailers participated, explores key issues in retail supply chain management. The retail industry in India is on a transformational rollercoaster and therefore retailers are more reliant than ever on supply chain management for organizational success. There is a strong focus on operational efficiencies, process improvements and overall profitability of top line and bottom line measures. Supply chain executives along with the technology executives are being called upon to create
innovative strategies that will increase efficiency and drive down costs while maintaining excellent service levels.

Margins for the retailers are very thin and it takes a few years for a store to break even after it starts operating. Retailers need to have patience, deep pockets, continuous innovation and localization of product and service for the consumers to become successful. The purpose of this study is therefore to explore the critical role Supply chain management plays in the success of the retail industry.

The study addresses four key research questions:

- What is the role of supply chain management practices in retail firms in India
- What Supply chain challenges are of greatest concern to the retail industry
- What role does technology play in managing the supply chain of retail firms
- What capabilities must retailers develop and leverage to achieve supply chain excellence

This report is thus a detailed piece of documentation that captures all facets of supply chain from a retailer’s perspective. It is a handy guide on supply chains in retail in India with an inside view from people and organizations who matter in this space.

We sincerely hope that these insights equip you with a unique understanding about the retail supply chain domain in the country and enable you to make informed decisions about your supply chains right from supplier to all the way to the store shelf.
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A) Primary Strategic Goal for Retailers for 2013-14

24% of the retailers that participated in our survey chose expansion through opening new stores as the primary strategic goal for retailers. Some of the retailers have burnt their fingers by opening stores in areas, which are already crowded with malls and retail outlets. Over a period of time, retailers are now much more cautious, while deciding the location of their stores. They prefer newer areas, which are not over retailed as yet and also looking at Tier II and III cities for expansion. But definitely expansion through opening new stores is one of the top agenda for the retailers in India.

19% of the retailers mentioned that adding new product lines is their next top of the mind agenda. Retailers would like to satisfy all the requirements of the consumer at one place so that consumers do not venture
into competitors stores. Today’s elite, educated and busy consumers are looking at convenience and therefore they would prefer a store, which is able to satisfy all the requirements at one location.

Business model transformation and creating a private label or sub brand is the next top of the mind agenda for retailers in India. Retailing is a very thin margin business. However, retailers, who have high private label as a percentage of the total sales, are able to enjoy higher margins. 15% of the retailers said that they would like to come out with their own private labels to enhance profitability in the near future.

12% of the retailers said that they would like to consolidate through closing unviable outlets. 9% of the retailers would like to undertake business streamlining via vertical integration and 5% of the retailers mentioned that they would like to acquire new business / competitors.
B) Primary Supply Chain Goal for Retailers 2013 – 2014

The Indian retailers face a lot of problems with reference to supply chain management and support infrastructure. We have underdeveloped supply chains, lack of strong cold chains, poor warehousing facilities and bad roads, which contribute to increased logistics costs for the retailers. We also do not have a mature third party logistics industry, which makes logistics and transportation extremely difficult.

Though retailers would like to outsource their logistics to 3PL, we do not have players providing high service levels at competitive prices. We have large number of intermediaries squeezing the margins of all involved, which adversely affects the margins as well as enhances the cases of mishandling, theft and increased instances of shrinkages. Economies of scale for the procurement of goods is a challenge faced by retailers as most of the retailers are not huge enough to really get the advantage of deep discounts due to bulk purchases.
Looking at the supply chain goals of the retailers, who participated in the survey for the year 2013-14, we see that most of supply chain managers have ranked store experience and product availability as their foremost agenda for the year ahead. This is followed closely by Inventory assortment and investment. Co-ordinate product flow right from the supplier to the store is the next agenda. Store customer service is next priority to the supply chain managers. Cost saving, supplier collaboration, supply chain cost knowledge and control, investment in information technology and private label offering are relative less priority for retail supply chain managers.

This clearly indicates that the complete focus of retail supply chain managers has shifted from cost consciousness to attracting customers and improving the footfall at stores. Store experience and product availability has become a prime focus as a retailer would try its best to provide a unique and fulfilling experience at the store so that long term brand loyalty could be developed and nurtured. If products are not available obviously consumers will visit competitors store and may get impressed by their store acting as a big threat to them.

To achieve good store experience and product availability retail supply chain managers, have to focus on appropriate inventory assortment and investment and ensuring that the product flows from the supplier to the store seamlessly.
C) Supply Chain Technology in Retail

With the evolution of retail sector, technology adoption is increasing continuously. Modern retailers are relying on technology to manage the rapidly changing business scenarios and diverse customer needs. The sector is now focusing on technology optimization and effectiveness. Large players are investing in the technologies like Enterprise resource planning, Supply chain management, Customer relationship management Business intelligence and analytics, E-commerce, etc. This is helping retailers to become agile and responsive apart from being able to reduce inventory holding costs and thus be profitable in the long run. The smaller retailers are investing in technologies like bar coding and point of sale technologies. As most of the retailers are doing barcode scanning of complete merchandise in and out of the stores, merchandise availability levels at departmental stores and smaller stores are at comfortable levels.

The study tried to identify the extent of technological adoption of some of the critical supply chain technologies in terms of technological adoption in less than 50% of the stores, all the stores, technology not in use and plans to implement the technology in the coming three years.
C1) Supply Chain Management Software

Around 52% of retailers use supply chain management software for more than 50% of their stores and around 19% of retailers use supply chain management software for less than 50% of their stores. The adoption of this technology has seen reasonably good penetration as almost 71% of retailers said that they use supply chain management technology either in less than 50% of the firms or more than 50% of the firms. 17% of the retailers mentioned that they do not use any form of supply chain management software and 12% said that they are planning to adopt this technology in the coming three years.

![Supply Chain Management Software Chart]

Source: RAI - SCMHRD India Retail Supply Chain Study 2013
C2) Customer Relationship Management Software

Customers today care more about the retailing experience than they did in the past. Their expectations from retailers go beyond just shopping of goods and services. Today, consumers are looking for a personalized, seamless and distinctive experience from the retailers. Retailers with multiple brands are looking at integrated cross brand customer and sales data to obtain a ‘single view’ of their customer and leveraging it across the brand portfolio. Compared to e-commerce, where the analytics is much stronger, brick and mortar retailers are lagging behind.

This space is bound to get more evolved given that retailers are looking towards targeted marketing for increasing store revenues and improving their return on investment on store promotions. Around 58% of retailers use integrated Customer relationship software for their marketing programs to engage with customers one-on-one, for more than 50% of their stores and around 11% of retailers use it for less than 50% of their stores. 23% of retailers do not have a promotion plan that is integrated with their CRM software. The adoption of this technology is quite reasonable especially in all multi-brand retailers and e-commerce companies. However, this is an area of evolution and retailers admit that much is yet to be done.

![Customer Relationship Management Software](chart)

*Source: RAI - SCMHRD India Retail Supply Chain Study 2013*
C3) E-Commerce

E-commerce is slowly becoming popular with the number of internet users expanding. It is offering personalized experiences to the on-line shoppers with rapid price and product comparisons and on the spot recommendations. Around 54% of the retailers claimed that they have on-line presence and around 27% claimed that they are planning to implement e-commerce in the coming 3 years. 19% claimed that they are currently not using E-commerce and do not plan to implement the technology in the coming future. Couple of e-commerce companies like ‘AaramShop’, ‘Kiranawalla’, ‘Dilligrocery’, ‘Greenytails’, ‘Chennaionlinegrocery’, ‘Pristine-nature’, ‘Myntra’, ‘Junglee’, ‘Indiaplaza’, etc are giving tough competition to the brick and mortar stores and forcing them to use this channel as well to sell their products. Eventually retailers who do not prepare themselves for venturing in this space would remain behind and lose the opportunity to capture additional customers. The multi – brand retailers are recruiting people with the designation ‘Head- E-commerce’, which depicts that this channel is slowly gaining its due importance and over a period of time most of the retailers will have an on-line presence.

![E-Commerce Chart]

**Source:** RAI - SCMHRD India Retail Supply Chain
C4) Customer Loyalty Cards

The survey indicates that the retailers are at a high level of maturity in terms of customer service processes like customer loyalty cards, which can capture the complete sales history of the customer and thereby enable the retailer to provide customized offerings to suite the customer. 60% of the surveyed retailers mentioned that they have implemented customer loyalty cards in more than 50% of the stores and 17% of the retailers have implemented the scheme in less than 50% of the stores. They are experimenting with the response of loyalty cards and would eventually launch it across the country. One of the key performance indicators that measure the effectiveness of the loyalty program is the ‘Loyalty customer sales vs. Total sales’. This tells the retailer how much of total sales from a channel customers are from its loyalty. It is equally important to judge whether the customers are redeeming the points earned, which depicts their genuine interest in the loyalty program. Most of the multi-brand retailers have implemented a loyalty program; the single brand retailers are trying to catch the bandwagon.

![Customer Loyalty Cards Chart]

Source: RAI - SCMHRD India Retail Supply Chain Study 2013
C5) Data Mining and Analytics

Customer loyalty cards help capturing customer data in terms of customer demographics, purchase history, which thereby provide customer insights. Retailers use business intelligence systems to analyze the customer data, helping them to improve merchandise and assortments, defining and executing targeted promotional campaigns, etc. This is turn leads to better shopping experience and incremental sales. 52% of the retailers surveyed conveyed that they have implemented Data mining and analytics in more than 50% of their stores. 17% have conveyed that they have implemented data mining and analytics is less than 50% of the stores. 19% have communicated that they plan to implement data mining and analytics in the coming three years. Analytics can significantly improve the return on investment for promotions and help build brand loyalty, which in turn results in higher share of customer’s wallet.

![Data Mining and Analytics Chart]

Source: RAI - SCMHRD India Retail Supply Chain Study 2013
D) Supply Chain Management parameters

Availability of right merchandise at the right place, in the right condition, within the right timeframe and at a minimum cost is the primary objective of retail supply chain management. Goods in store but not on shelves could mean loss of sales and an undesirable customer experience. It is also important to vary the assortment and merchandise from one store to another to take care of the regional requirements of the location. We have tried to capture the various supply chain management parameters and how the retailers are performing on each of the construct.

D1) Parameter: Customer Relationship Management

Our firm frequently evaluates the formal and informal complaints of our customers

Retailers are taking initiatives to ascertain what the customer feels as the customer may not always inform the store about the dissatisfaction but at the same time slowly withdraw, which in turn is loss of sale for the retailer as well as reduction of brand loyalty for the store. The impact could be a ripple effect as a disgruntled customer will share the experience with friends, relatives and through social media. Retailers are therefore trying to capture data about what the customer feels through regular customer satisfaction index (CSI), which is often conducted through external agencies to bring in more objectivity and seriousness to the whole activity. Some of
the retailers link the results of the Customer satisfaction index with the key performance area and performance of the store manager / category manager. Our study reveals that 63% of the retailers agree and 27% strongly agree that their firm frequently evaluates the formal and informal complaints of the customer. Only 10% of the retailers surveyed mentioned that they do not have any process in place to capture customer complaint data.

Our firm frequently evaluates the formal and informal complaints of our customers

![Bar chart showing the percentage of retailers who agree or strongly agree on evaluating customer complaints.](chart)

Source: RAI - SCMHRD India Retail Supply Chain Study 2013

Our firm frequently measure and evaluate customer satisfaction and use it to identify/determine customer’s requirement

56% of the surveyed retailers mentioned that they agree and 29% of the retailers mentioned that they strongly agree that they frequently measure and evaluate customer satisfaction and use it to identify / determine customer's requirement. This depicts customer orientation of the retailers, which is a step in the right direction.

Our firm frequently measure and evaluate customer satisfaction and use it to identify/determine customers requirement

![Bar chart showing the percentage of retailers who agree or strongly agree on measuring customer satisfaction.](chart)

Source: RAI - SCMHRD India Retail Supply Chain Study 2013
Customer focus is reflected in our business planning

From the surveyed retailers, we can see that 42% retailers mentioned that they strongly agree that customer focus is reflected in their business planning. Another 44% said that they agree that customer focus is reflected in their business planning. The conviction of customer focus in business planning has to further scale up with majority retailers focusing on customers’ requirements right from the planning stage.

D2) Parameter: Supplier Relationship Management

Our firm strives to establish long-term relationships with our suppliers.

About 50% of the surveyed retailers mentioned that they strongly agree that their firm strives to establish long term relationship with their suppliers. 38% of the retailers mentioned that they agree that their firm strives to establish long term relationship with their suppliers.
D3) Parameter: Human Resource Skill level and competency

Our firm is able to acquire people with the right skill set

Availability of trained manpower both at the store and managerial level has been a major concern for the Indian retail sector. The attrition rates are very high in India. The remuneration paid to the front line store employees is rather low for some of the multi-brand retailers. This inhibits the retail firm to acquire the best talent from the market. Most of the retail firms are not geared up to provide long term career development opportunities to the employees. Medical insurance, higher education sponsorship and continuous training are some of the ways employees will be able to visualize a long term relationship with the firm and thereby plan to stay for a longer duration thus bringing attrition levels under control. The employees of retail firms need to work long hours and cannot take off on weekends which puts additional pressure on the employee and affects the personal life. The retailer therefore needs to create a social atmosphere at work, which facilitates learning and enjoyment to enable them to stay with the organization on a long run. The survey indicates that 23% retailers mentioned that they strongly agree that they are able to acquire people with the right skills, 42% mentioned that they agree that they are able to acquire people with the right skill. A large sample size of 34% retailers mentioned that they disagree or are indecisive about whether they are able to acquire the right talent.
Our supply chain managers are trained to manage the different stages of the supply chain process

Our study reveals that 15% retailers strongly agree and 54% retailers agree that their supply chain managers are trained to manage the different stages of the supply chain process. 31% of the retailers either disagree or are indecisive about whether their supply chain team members are trained to manage the different stages of supply chain. This indicates that there is a requirement to train and empower the employees so that they are able to manage their functions more effectively. It is important to ensure that continuous training and development activities are carried out to enhance the competencies and skill levels of employees.

Our supply chain managers do not face skill shortage

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Only 40% of the retailers agree or strongly agree that they do not face skill shortage. Rest of them are either indecisive or disagree, which clearly means that there is skill shortage. Probably retailing is still not one of the most lucrative professions for aspiring incumbents. Excessive working hours, no holidays on weekends, high pressure job could be some reasons why the industry faces skill shortage.

D4) Parameter: Supply chain performance

Our forecasting and material planning accuracy is high

Only 6% of the surveyed retailers mentioned that they strongly agree that their forecasting and material planning accuracy is high. Another 48% mentioned that they agree that their forecasting and planning accuracy is high. Rest 46% of retailers mentioned that they either are indecisive or disagree that their planning and forecasting accuracy is high. This depicts that the maturity level with regards to forecasting and material planning is still not high and retailers need to work hard to achieve the same.

Retailers would need to put in extra efforts to make their supply chain responsive by communicating the requirements from the stores in terms of good picks and bad picks at a fast pace to the planners, so that they can on a real time basis access the requirement of the product and accordingly plan the supply. Most of the retailers are able to get an access to the store sales data on a day to day basis, but the problem is in terms of converting these figures into tangible actions for decision making. Over a period of time, supply chain managers would be able to manage this portfolio better especially with the advent of better technological support and algorithms, which enable decision making.
Our key suppliers ensure delivery reliability and consistency

The confidence with supplier delivery and reliability seems to be low. Only 6% of the respondents mentioned that they strongly agree that their suppliers delivery reliability and consistency is high, 58% mentioned that they agree that the delivery reliability and consistency is high and the remaining 36% mentioned that either they are indecisive or they disagree that the key suppliers ensure delivery reliability and consistency. There is definitely scope for improvement and retailers would need to cajole the suppliers to adhere to timelines, thus avoiding overstocking at the stores to take care of the inefficiency of the supplier. If supply chain managers do not have faith in the timelines given to the suppliers, they would end up building up stocks, which in turn adds up to the cost of inventory and many times the tastes and preferences may change, making the inventory obsolete. Therefore supply chain managers need to work with their suppliers to ensure that delivery reliability and consistency is high.
Our firm has precise supply chain cost knowledge and control

19% respondents conveyed that they strongly agree that they have precise supply chain cost knowledge and control. 46% mentioned that they agree that they have precise supply chain cost knowledge and control. This depicts that implementation of enterprise resource planning software has enabled retailers to capture exact cost data. Cost consciousness due to margin pressures has also forced retailers to understand and know about each penny spent. There is a lot of pressure on supply chain managers to reduce supply chain costs to enhance profitability, without compromising on customer service and experience and therefore supply chain managers are aware about their supply chain cost and are also able to control them to a great extent. Those who are unable to do so are struggling and would need to join the bandwagon soon.

Our firm has fast customer response

19% of the surveyed retailers mentioned that they strongly agree that they facilitate fast customer response. 48% mentioned that they agree that they facilitate fast customer response and the remaining 33% mentioned that they are either indecisive or disagree that they are able to respond to customer requirements. This is one area, where retailers would need to put in extra effort to ensure that they respond to customer requirements at a fast face or else lose business. Customers are more than willing to try out new stores and therefore retailers would need to go that extra mile to lure and build brand loyalty.
Our firm has rigorous inventory management and rationalization

Processes around inventory management and rationalization at the store are a key focus area for all the retailers. Some of the retailers are outsourcing their stock takes to specialized firms and reaping benefits as the whole activity becomes more objective and therefore more reliable. Retailers are also looking at decreasing shrinkage levels by focusing on process, policy and technology initiatives. 15% of the retailers mentioned that they strongly agree that their firm has rigorous inventory management and rationalization and 63% mentioned that they agree that they have rigorous inventory management and rationalization. 23% mentioned that either they are indecisive or disagree that they have rigorous inventory management and rationalization.
E) Representative List of Participation

Aditya Birla Retail Ltd.
Bestseller
BMI
Baggit
Carrefour India
Catwalk Worldwide Pvt. Ltd.
Celio
Deepam Silk Retail Pvt. Ltd.
Reliance Digital
Future Group
Future Value Retail
Gili India Ltd.
Globus Stores Pvt. Ltd.
Guardian Life care
@home
Home store India Ltd.
Hyper city Retail India
Ishanya
ITC Ltd.
Khadim India Ltd.
Lifestyle International
Lotto
Mad Over Donuts

Madura Fashion and Lifestyle
Max Hypermarkets India Pvt. Ltd.
Mahindra Retail
Monginis Foods Pvt. Ltd
Movie Exhibition
Prakash retail Pvt. Ltd.
Press2 Dry Cleaning & Laundry Pvt. Ltd.
Provogue Ltd.
Reliance Retail Ltd.
Shoppers Stop Ltd.
Smart Retail Pvt. Ltd.
Soul flower
Spencer’s Retail Ltd.
TCNS Clothing Co. Pvt. Ltd.
The Mobile Store
Trent Hypermarket Ltd.
Unilet Appliances Pvt. Ltd.
Vividha Home Fashions Pvt. Ltd.
F) Research Methodology

A questionnaire based e-survey was mailed to all the retail supply chain managers, operations & logistics managers and warehouse managers. Follow up calls were made to pursue respondents to fill up the e-survey. Telephonic calls were also scheduled to get a deeper insight into the retail supply chain issues through unstructured interviews.

This “RAI- SCMHRD India Retail Supply Chain Study 2013” saw an enthusiastic response to the study from some of the India’s leading retail professionals and companies. 50 retailers participated in the study ranging from industry heavyweights, e-commerce companies to ambitious start-ups. The research team analyzed feedback received from CEO, Head Supply Chains, Head IT and Supply Chains, Vice Presidents, Logistics Managers, General Managers and Managers. This data was aggregated and studied closely to give us a bird’s eye view of where the retail supply chain stands today and the future outlook.
F1) Type of Retailers

For this study, we wanted to get a varied mix of respondent. So in collaboration with Retailers Association of India (RAI), we approached a large number of retailers operating in different segments. Therefore, a healthy mix was achieved with 73% of our respondents being multi brand retailers and the remaining 27% representing single brand operations.

![Type of Retailers Chart](image)

Source: RAI - SCMRHD India Retail Supply Chain Study

F2) Respondents profile in terms of years of experience in the retail sector

When we look at the respondents experience in the retail supply chain and logistics arena, we see that 17% of the respondents are industry veterans with over 16 years of experience, 27% of the respondents are industry veterans with experience ranging between 11 to 15 years, 39% of the respondents are industry veterans with 6 to 10 years of experience and only 17% of the respondents have experience less than 5 years. While collecting responses we tried to ensure that we are able to get a response from majority of the single brand and multi brand retailers, so that the study depicts, what majority of the retailers think, instead of getting biased opinions based on a few select retailers. We were able to capture data from 50 unique retailers and therefore it is quite evident that the opinions and
insights reflected in the survey represent a vast cross section of supply chain managers in the country. We tried to ensure that all the Head – Supply chains of retail firms were able to participate in the survey.

F3) Strength and Workforce

35% of the retailers surveyed, shared that they have between 500 to 2500 employees at most. About 29% revealed to have employees up to 500 and the remaining 36% revealed that they have employees greater than 2500 employees.
F4) Location and Reach

Around 40% of the survey respondents revealed that they have brick and mortar stores in more than a 100 locations. This is followed by a sharp decline in the number of retailers who have an expansive physical presence. Data shows that only 7% have 76 to 100 stores. 22% of the retailers have stores between 51 to 75 locations and a similar percentage of retailers who have stores between 11 to 50. The current study included 10% of the retailers who had stores between 1 to 10. Therefore, it can be concluded that the study focuses on brick and mortar stores having substantial presence in terms of the number of stores.

### Number of Retail Outlets

- **39%**: 1 to 10 Locations
- **22%**: 11 to 50 Locations
- **22%**: 51 to 75 Locations
- **7%**: 76 to 100 Locations
- **10%**: Over 100 Locations

Source: RAI - SCMHRD India Retail Supply Chain Study 2013
Report Team for the India Retail Supply Chain Study 2013

This research report is a comprehensive collaborative effort between two different organizations, based in two different cities and specializing in two different fields. The following people from the core team(s) at the heart of this study and were responsible for the questionnaires, conducting the survey, participating outreach, data collection, data analysis, content writing, report printing and logistics:

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Retailers Association of India (RAI) is a non-profit organization that works with all the stakeholders for creating the right environment for the growth of the modern retail industry in India. For more information, please visit – www.rai.net.in

Symbiosis Center for Management & Human Resource Development (SCMHRD) is a premier institute honing world class leaders and entrepreneurs. Established in 1993, SCMHRD's MBA program is one of the most prestigious programs in India. For more information, please visit – www.scmhrd.edu

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