



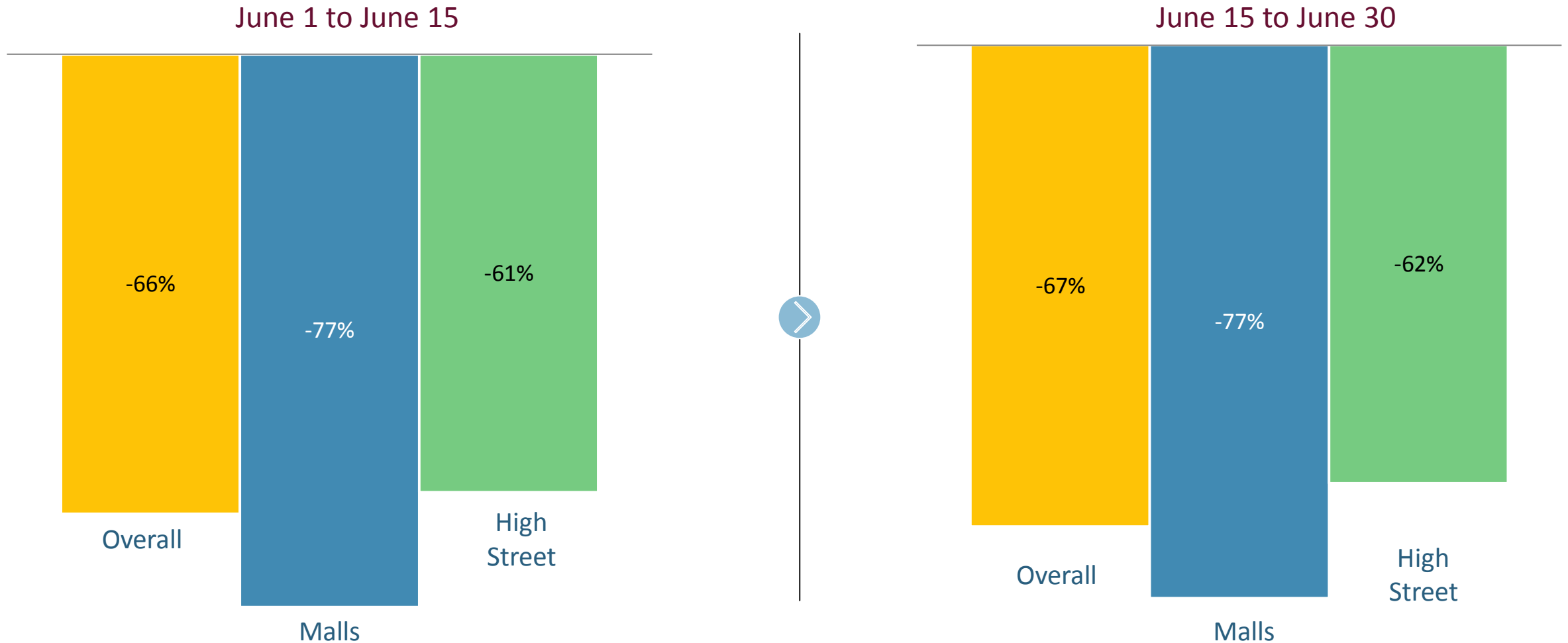
**Retailers
Association of
India**

RAI Business Survey- Round 3

July 4, 2020

Overall growth in June 2nd half remains muted, Stores in Malls continue to degrow at -77%

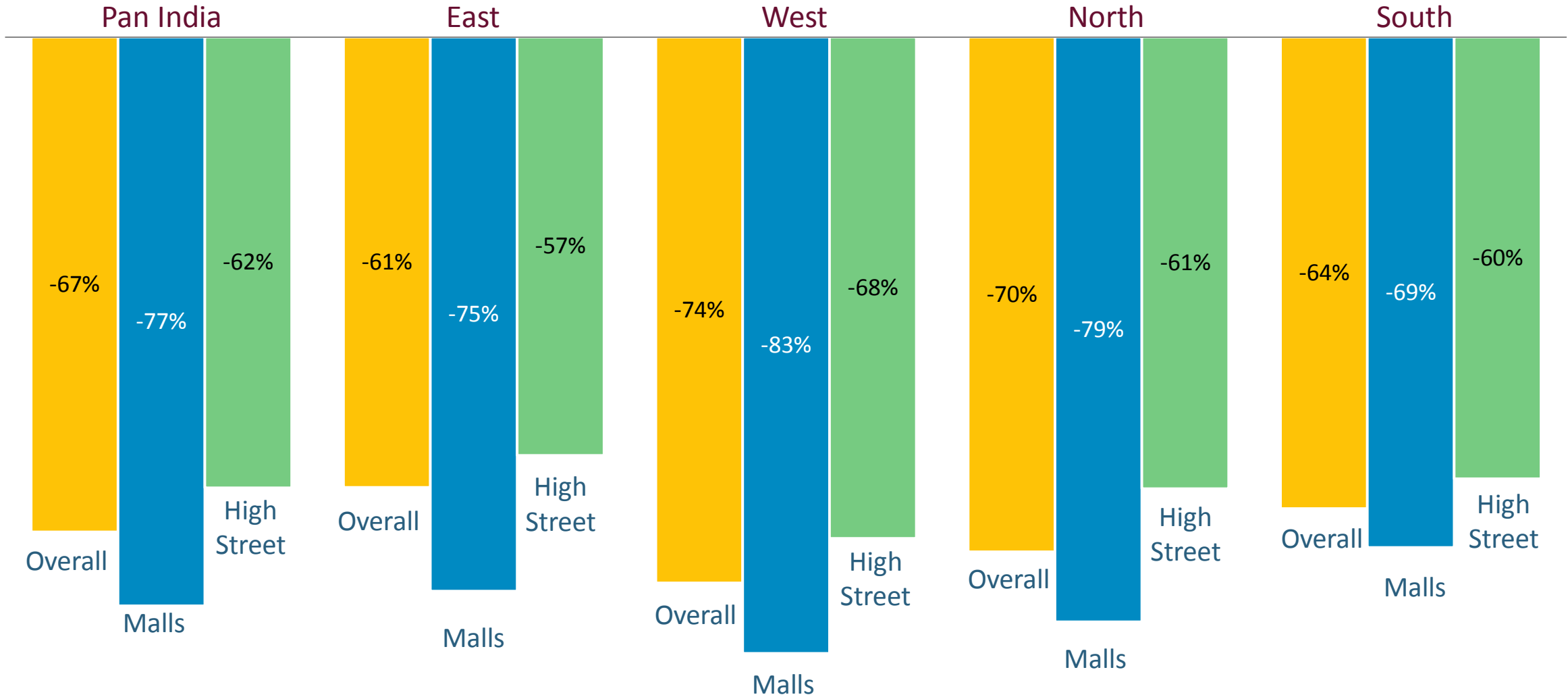
June 2020
(Y-o-Y % degrowth)



Note: 1) Sample Set of 117 Retailers 2) Data pertains to 2020 3) Sales loss in corresponding month compared to last year

Marginal recovery led by East and South regions, North and West continue to be in deep de-growth trajectory

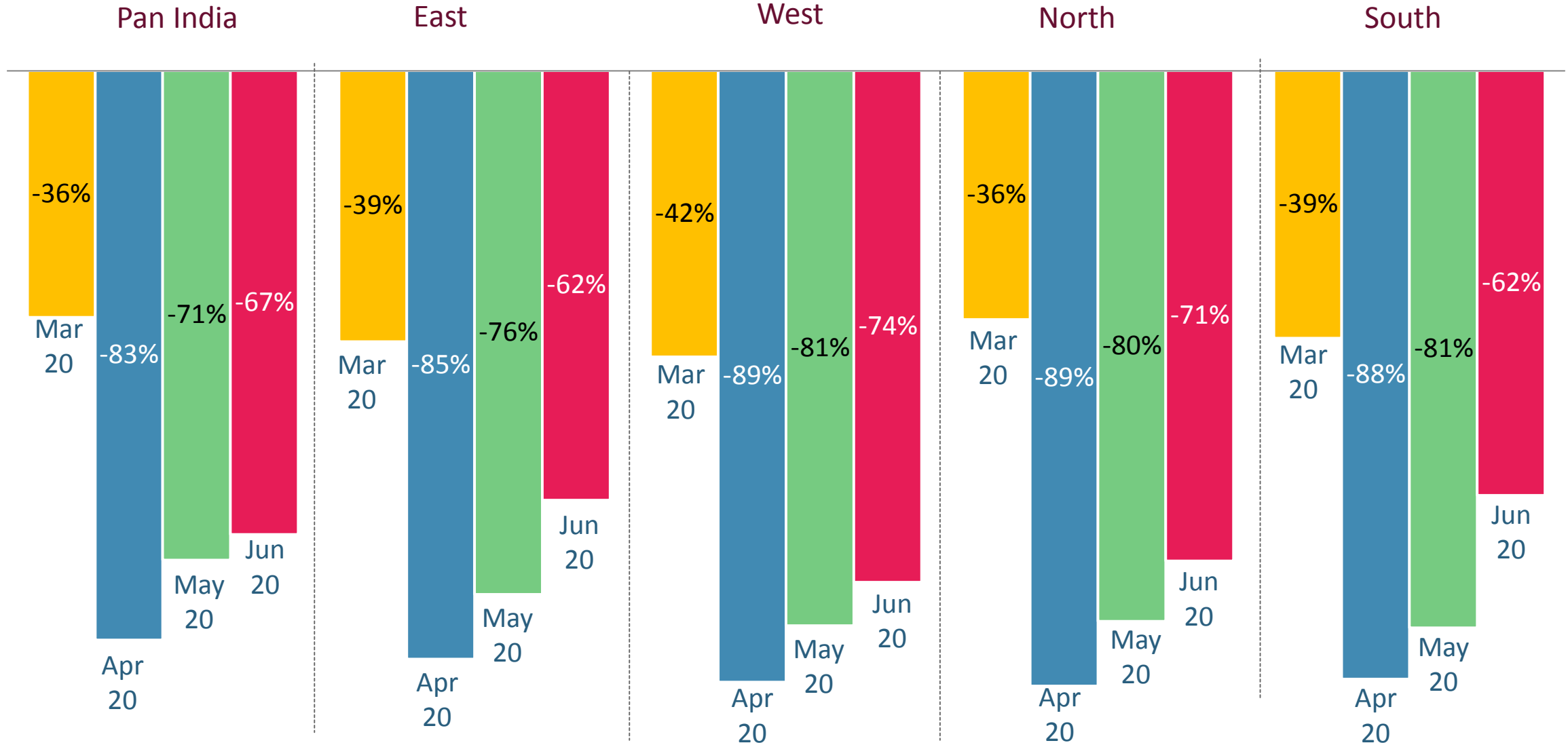
June 15 to June 30
(Y-o-Y % degrowth)



Note: 1) Sample Set of 117 Retailers; 2) Data pertains to 2020 3) Sales loss in corresponding month compared to last year (June 15, 2020 to June 30, 2020 vs June 15, 2019 to June 30, 2019)

Quantum of degrowth marginally reduced in June 2020; Q1 of FY21 continued to witness degrowth of around -74%

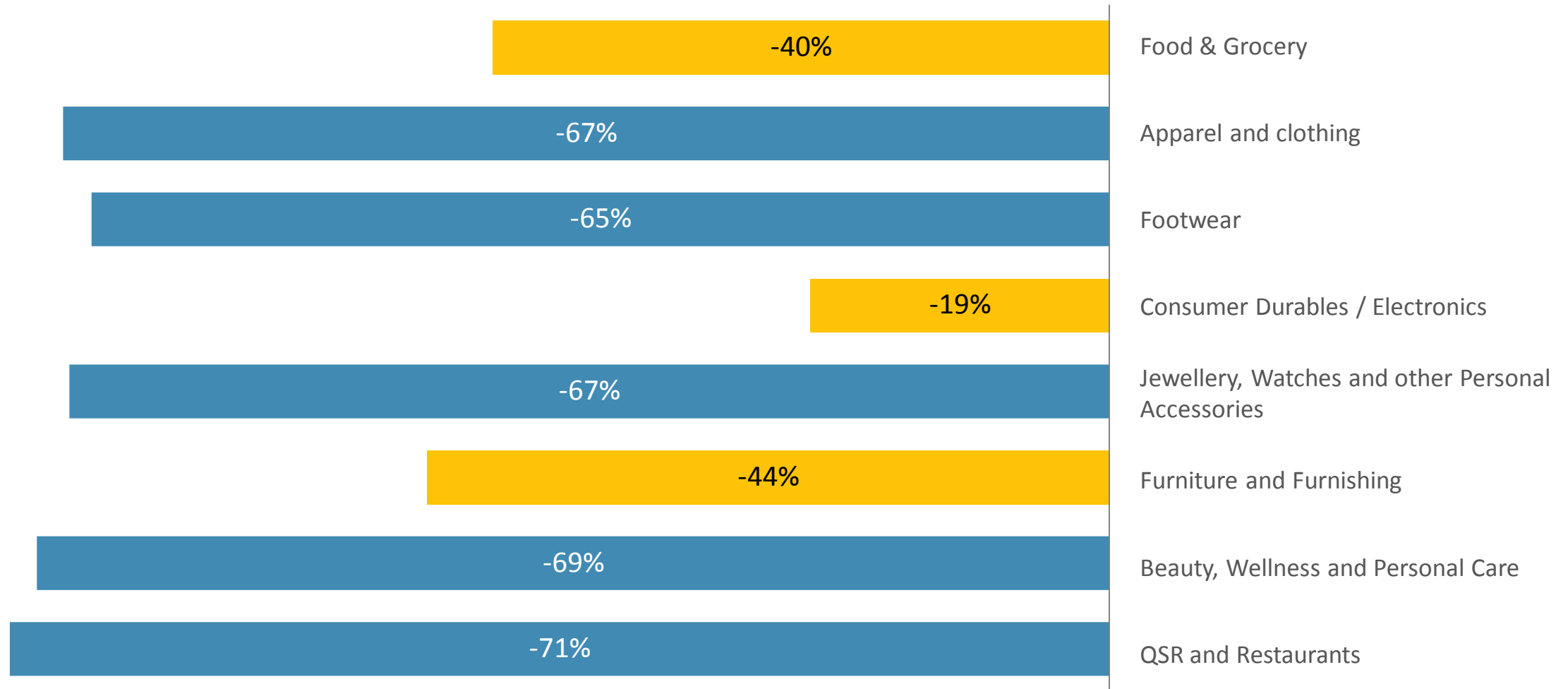
(Y-o-Y % degrowth)



Note: 1) Sample set of Retailers in March, April & May: 153 , June 1st half: 103, June 2nd half: 117 2) Data pertains to 2020 3) Sales loss in corresponding month compared to last year

A few categories such as Food & Grocery, Consumer Durables and Furniture indicate signs of recovery

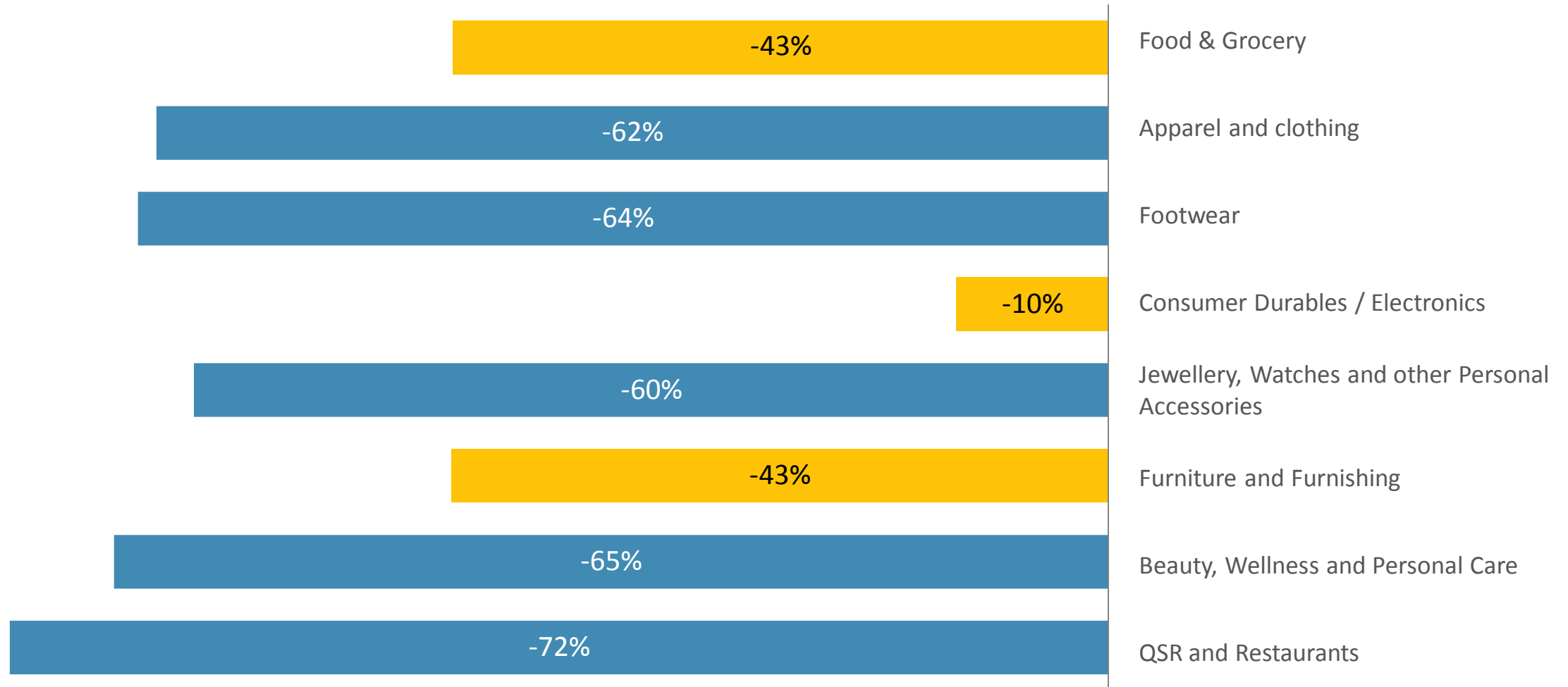
June 2020
(Y-o-Y % degrowth)



Note: 1) Sample Set of Retailers in June 1st half- 103, June 2nd half- 117 ; 2)Data pertains to 2020 3) Sales loss in corresponding month compared to last year (June 1, 2020 to June 30, 2020 vs June 1, 2019 to June 30, 2019)

Highstreet Retail stores are leading this recovery across these categories...

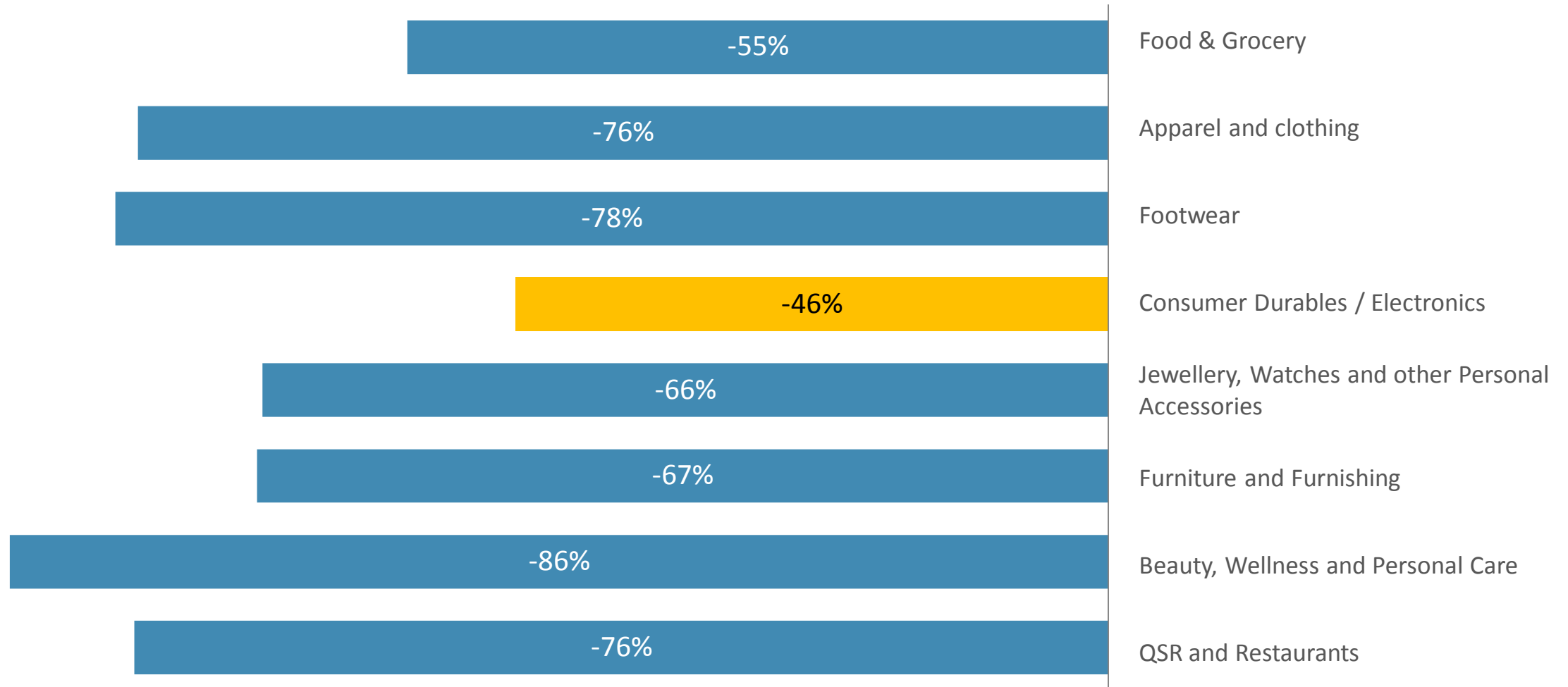
June 2020
(Y-o-Y % degrowth)



Note: 1) Sample Set of Retailers in June 1st half- 103, June 2nd half- 117 ; 2)Data pertains to 2020 3) Sales loss in corresponding month compared to last year (June 1, 2020 to June 30, 2020 vs June 1, 2019 to June 30, 2019)

...Though business in malls is in deep red zone across all categories

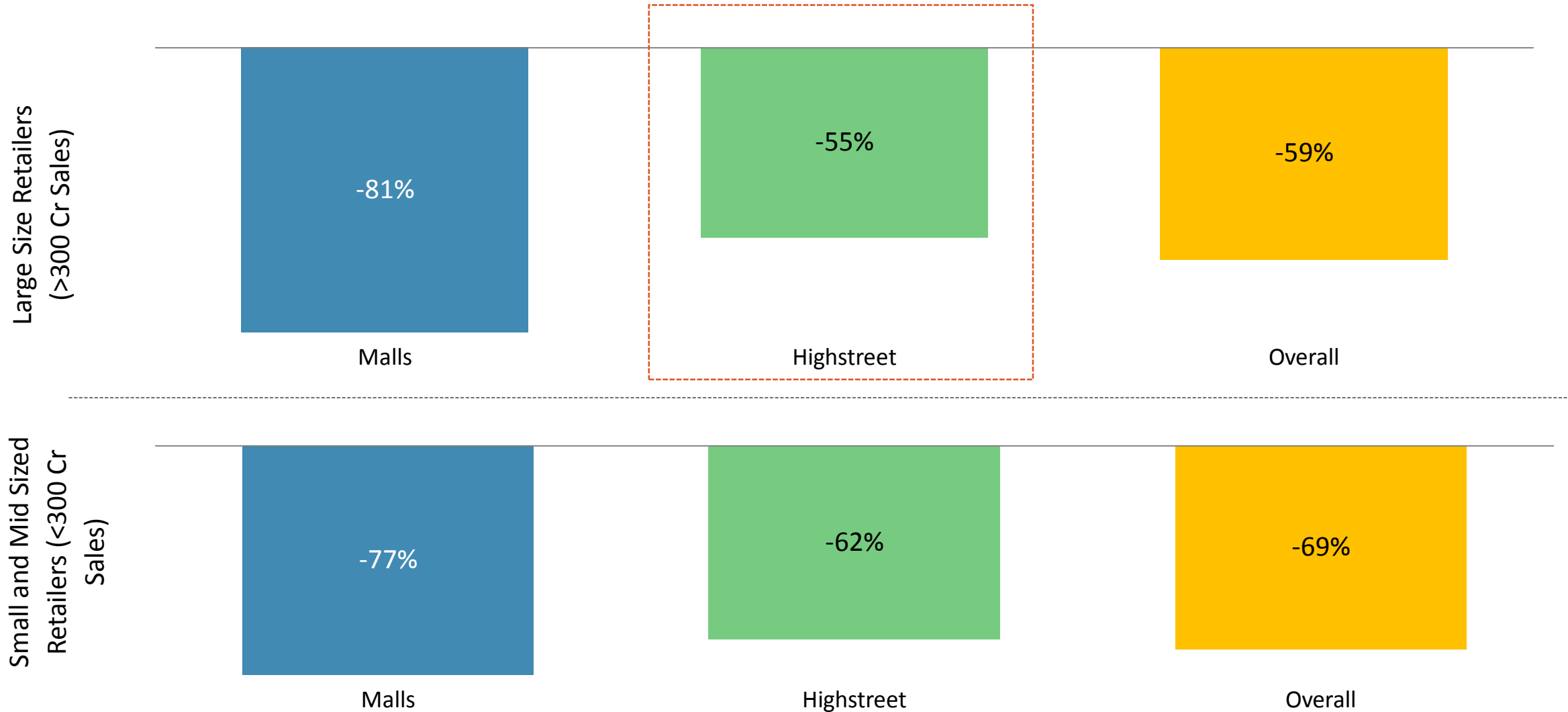
June 2020
(Y-o-Y % degrowth)



Note: 1) Sample Set of Retailers in June 1st half- 103, June 2nd half- 117 ; 2)Data pertains to 2020 3) Sales loss in corresponding month compared to last year (June 1, 2020 to June 30, 2020 vs June 1, 2019 to June 30, 2019)

Granular analysis of recovery indicates Large sized Retailers (>300 Cr) did better in Highstreet stores for the month of June 2020

June 2020
(Y-o-Y % degrowth)



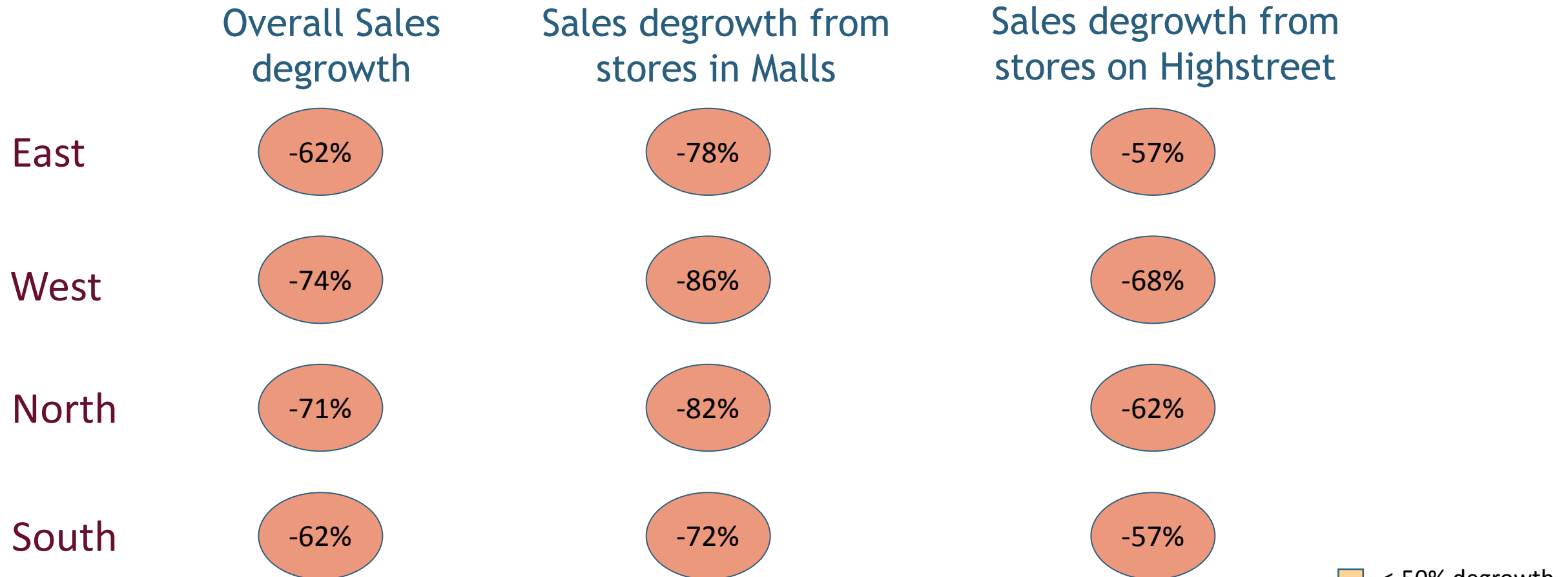
Note: 1) Sample Set of Retailers in June 1st half- 103, June 2nd half- 117 ; 2) Data pertains to 2020 3) Sales loss in corresponding month compared to last year (June 1, 2020 to June 30, 2020 vs June 1, 2019 to June 30, 2019)



Appendix

Unlock 1.0 - Sales continue to witness degrowth across Malls & Highstreet

June 2020
(Y-o-Y % degrowth)

Region-wise monthly sales degrowth (%)



 <-50% degrowth
 >-50% degrowth

Note: 1) Sample Set of Retailers in June 1st half- 103, June 2nd half- 117 ; 2)Data pertains to 2020 3) Sales loss in corresponding month compared to last year (June 1, 2020 to June 30, 2020 vs June 1, 2019 to June 30, 2019)

Degrowth seen across Turnover sizes Pan India (I/II)

June 2020
(Y-o-Y % degrowth)

Eastern region monthly sales Degrowth (%)

Turnover	Overall Sales Degrowth	Sales Degrowth from stores in Malls	Sales Degrowth from stores on Highstreet
Upto 20 crore	-57%	-63%	-56%
20-300 crore	-77%	-89%	-66%
Above 300 crore	-53%	-82%	-49%

Western region monthly sales Degrowth (%)

Turnover	Overall Sales Degrowth	Sales Degrowth from stores in Malls	Sales Degrowth from stores on Highstreet
Upto 20 crore	-75%	-87%	-75%
20-300 crore	-79%	-88%	-73%
Above 300 crore	-70%	-86%	-63%

■ <-50% degrowth
 ■ >-50% degrowth

Note: 1) Many respondents have retail presence in more than one region 2) Sample Set of Retailers in June 1st half- 103, June 2nd half- 117

Degrowth seen across Turnover sizes Pan India (II/II)

June 2020
(Y-o-Y % degrowth)

Northern region monthly sales Degrowth (%)

Turnover	Overall Sales Degrowth	Sales Degrowth from stores in Malls	Sales Degrowth from stores on Highstreet
Upto 20 crore	-72%	-74%	-65%
20-300 crore	-80%	-87%	-70%
Above 300 crore	-64%	-78%	-54%

Southern region monthly sales Degrowth (%)

Turnover	Overall Sales Degrowth	Sales Degrowth from stores in Malls	Sales Degrowth from stores on Highstreet
Upto 20 crore	-61%	-68%	-67%
20-300 crore	-65%	-72%	-57%
Above 300 crore	-56%	-74%	-50%

■ <-50% degrowth
 ■ >-50% degrowth

Note: 1) Many respondents have retail presence in more than one region 2)) Sample Set of Retailers in June 1st half- 103, June 2nd half- 117

Thank
you!!

