



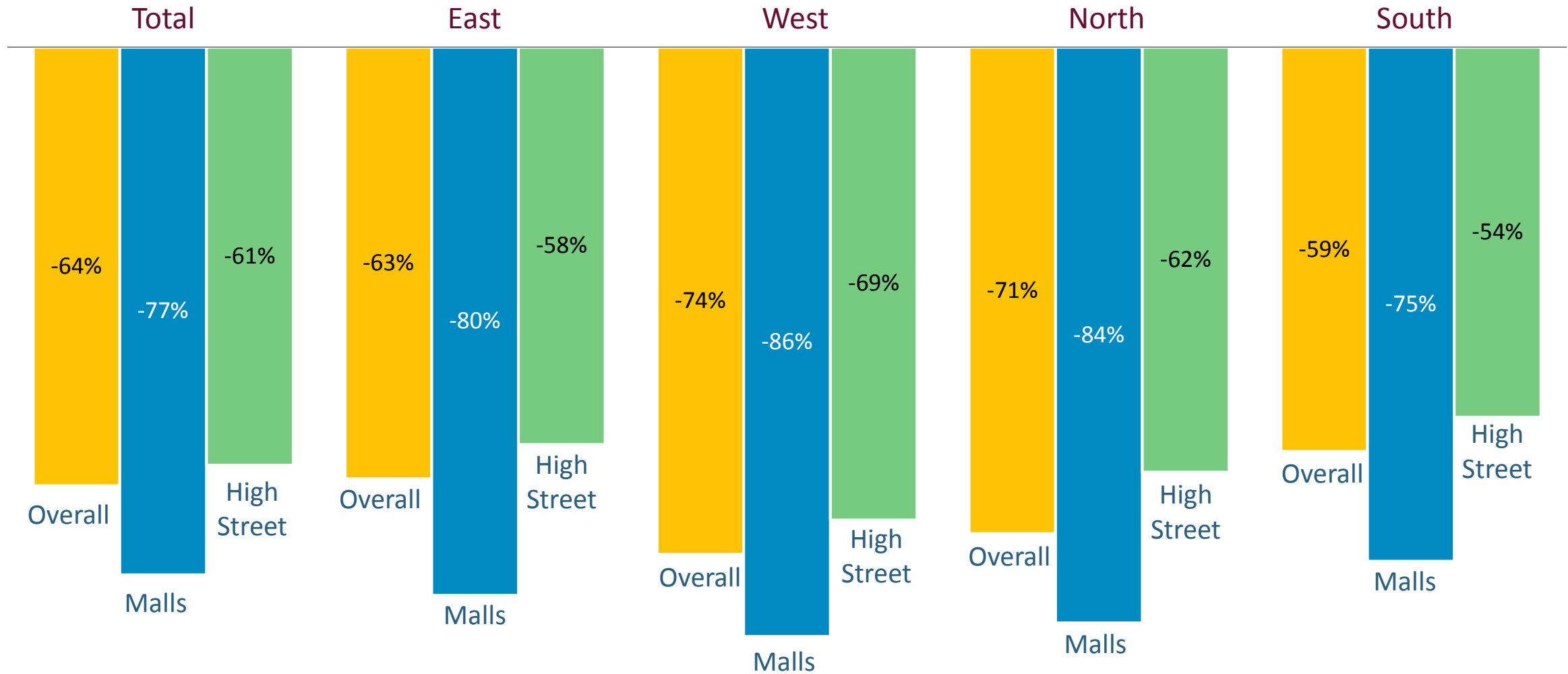
**Retailers
Association of
India**

RAI Business Survey- Round 2

18th June, 2020

>75% sales degrowth in Malls across Geographies, Highstreet marginally better at ~-61%

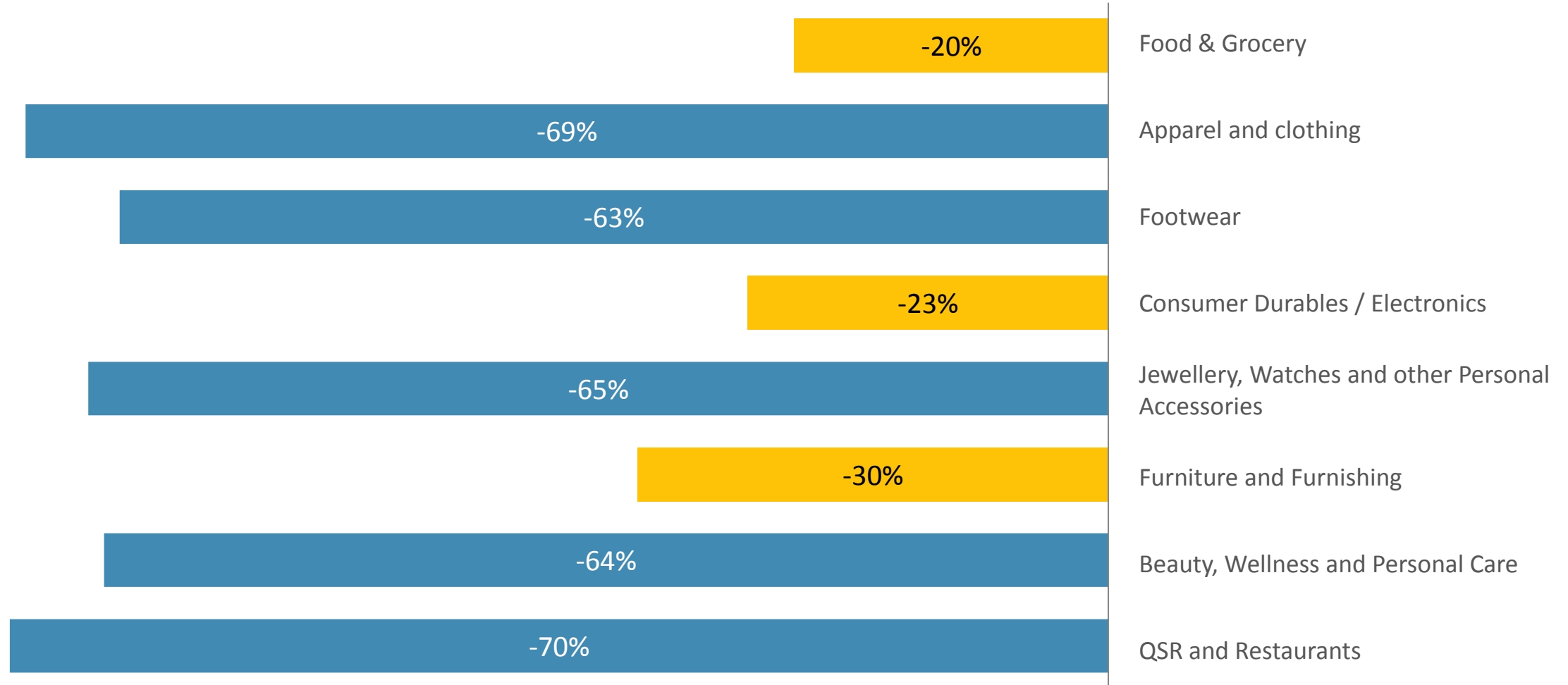
Jun 1 to Jun 15
(Y-o-Y % degrowth)



Note: 1) Sample Set of 103 Retailers; 2) Data pertains to 2020 3) Sales loss in corresponding month compared to last year (June 1, 2020 to June 15, 2020 vs June 1, 2019 to June 15, 2019)

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

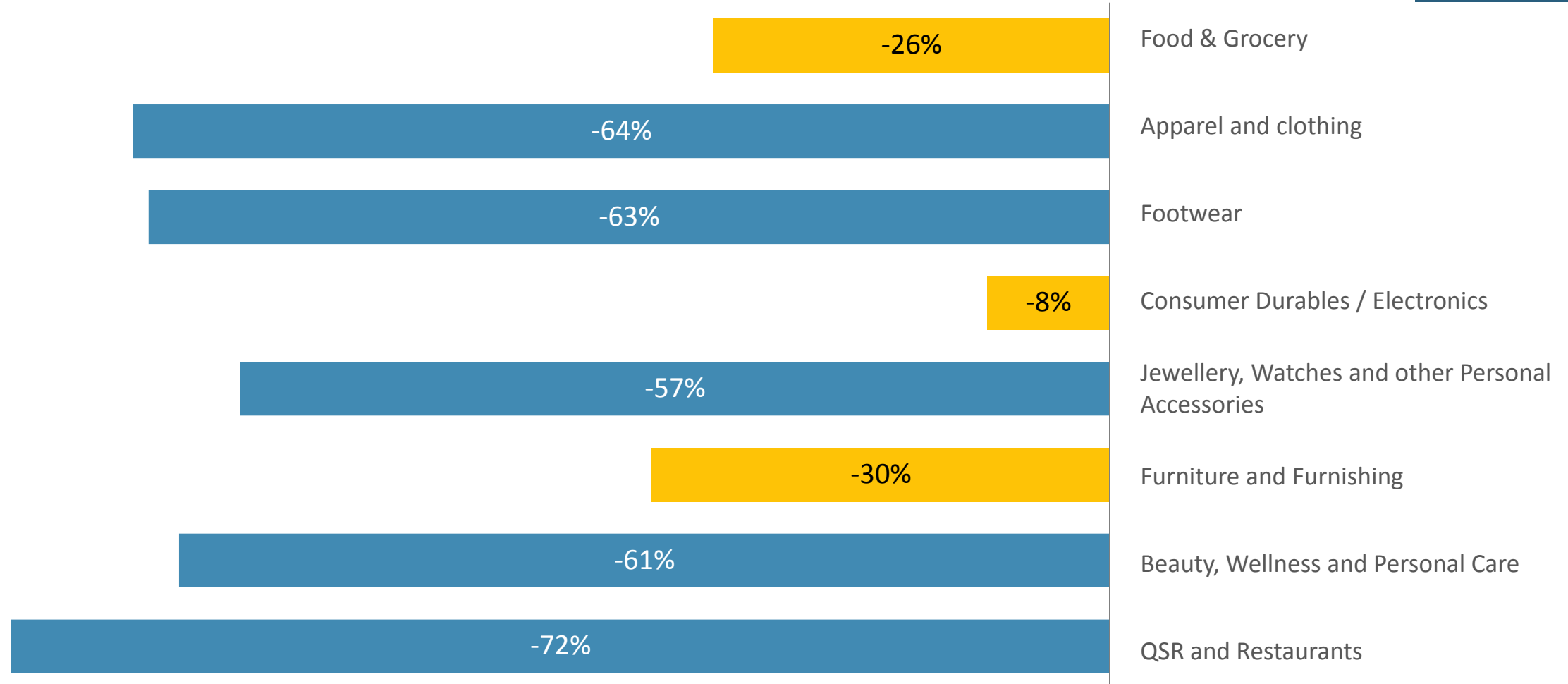
Jun 1 to Jun 15
(Y-o-Y % degrowth)



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

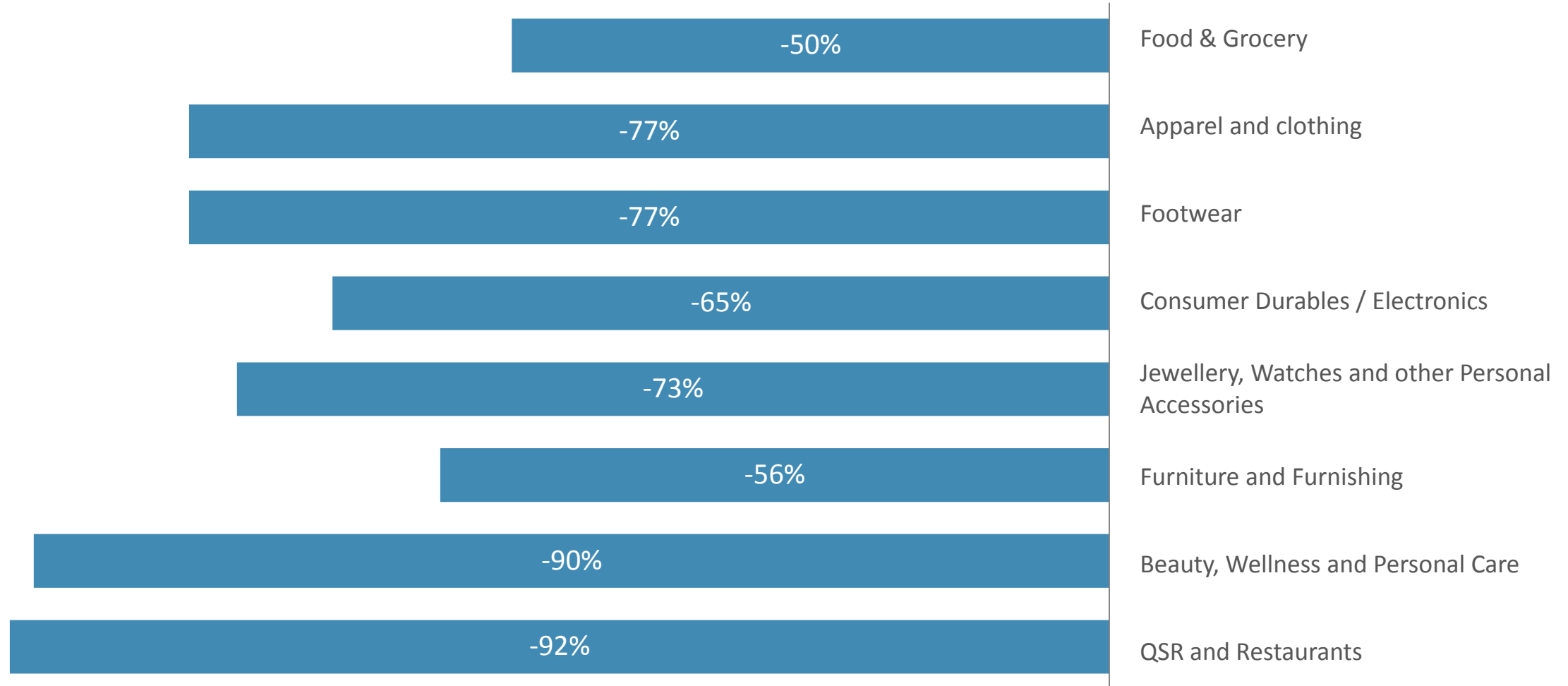
Jun 1 to Jun 15
(Y-o-Y % degrowth)



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

Jun 1 to Jun 15
(Y-o-Y % degrowth)



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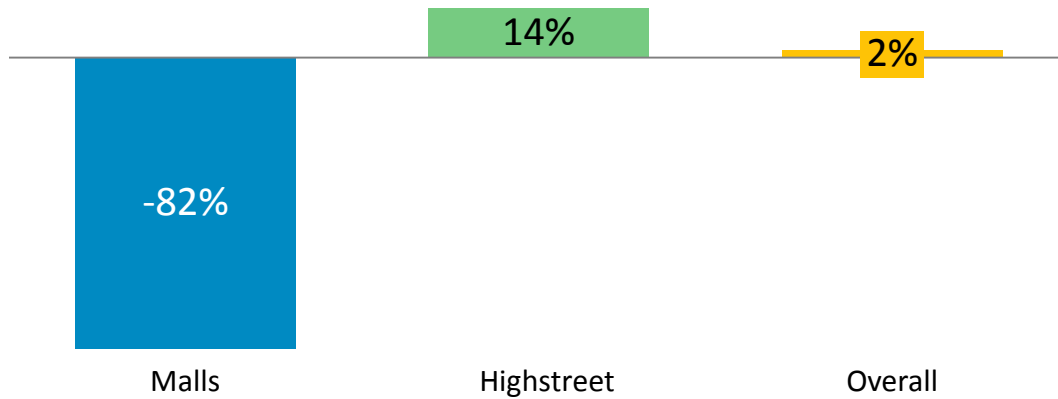
Retailers operating in certain categories have shown recovery driven by Highstreet stores; Large size Retailers performing much better

Jun 1 to Jun 15
(Y-o-Y % degrowth)

Sales de-growth in companies with Businesses in **Food and Grocery, Consumer Durables, Furniture**

Sales de-growth in companies without Businesses in **Food and Grocery, Consumer Durables, Furniture**

Large Size Retailers
(>300 Cr Sales)



Small and Mid Sized
Retailers (<300 Cr Sales)

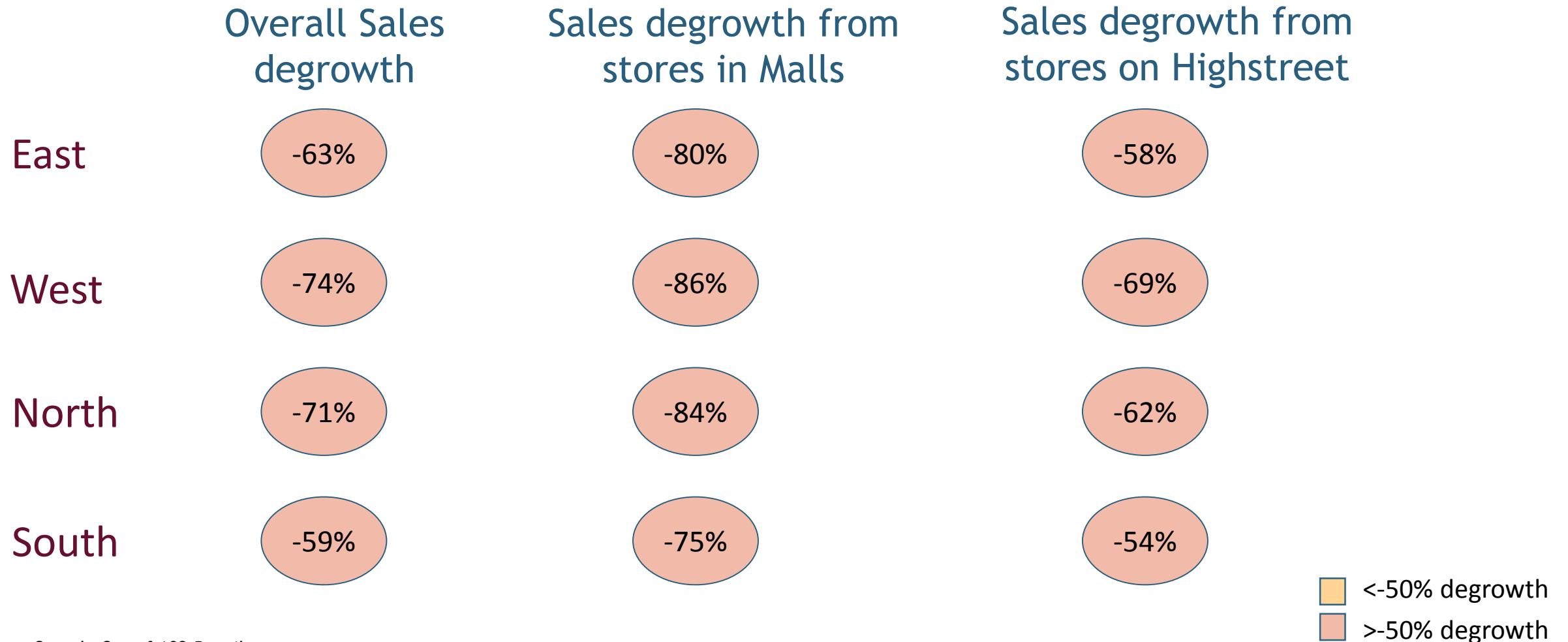


Note: 1) Sample Set of 103 Retailers, 2) June 1, 2020 to June 15, 2020 vs June 1, 2019 to June 15, 2019

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

Jun 1 to Jun 15
(Y-o-Y % degrowth)

Region-wise monthly sales degrowth (%)



Note: Sample Set of 103 Retailers


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


Eastern region monthly sales Degrowth (%)

Turnover	Overall Sales Degrowth	Sales Degrowth from stores in Malls	Sales Degrowth from stores on Highstreet
Upto 20 crore	-65%	-71%	-63%
20-300 crore	-78%	-94%	-68%
Above 300 crore	-51%	-85%	-45%

Western region monthly sales Degrowth (%)

Turnover	Overall Sales Degrowth	Sales Degrowth from stores in Malls	Sales Degrowth from stores on Highstreet
Upto 20 crore	-69%	-79%	-68%
20-300 crore	-80%	-88%	-76%
Above 300 crore	-73%	-90%	-64%

 <-50% degrowth

 >-50% degrowth

Note: 1) Many respondents have retail presence in more than one region

2) Sample set of Retailers in East - 49, West - 41


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


Northern region monthly sales Degrowth (%)

Turnover	Overall Sales Degrowth	Sales Degrowth from stores in Malls	Sales Degrowth from stores on Highstreet
Upto 20 crore	-70%	-82%	-65%
20-300 crore	-83%	-89%	-73%
Above 300 crore	-64%	-81%	-51%

Southern region monthly sales Degrowth (%)

Turnover	Overall Sales Degrowth	Sales Degrowth from stores in Malls	Sales Degrowth from stores on Highstreet
Upto 20 crore	-53%	-72%	-63%
20-300 crore	-64%	-74%	-55%
Above 300 crore	-56%	-79%	-46%

 <-50% degrowth

 >-50% degrowth

Note: 1) Many respondents have retail presence in more than one region.

2) Sample set of Retailers in North - 44, South - 54

Thank
you!!

