Chapter – 3

Methodology of the Study
3.1 STATEMENT OF THE PROBLEM:

Review of literature on Leather footwear retailing in general and in specific to Indian context evolved various problems confronted by footwear retail industry. Leather industry is racing towards hi-tech, advanced technologies and leather footwear retail outlets are competing to position themselves in a unique way. The retail market in India is estimated at Rs 5, 88,000 crores, of this the unorganized market is worth Rs 5, 30,000 crore and organised market is only 5000 crore. Recently it has been observed that the growth of the organised sector has been positive, but the unorganised sector will remain the strongest player in the domestic segment due to the cost advantage and unorganised distribution channels. Availability of the easy and low cost of capital for the unorganised sector has to be initiated. The government intervention in the areas of finance is required, this should be linked to the working capital requirement rather than modernisation since it is the S S I (small scale industries) and cottage industry, which are employment providers at the grass root level.

In this deregulated competitive environment foot wear retail outlets need to evolve and implement a strategic service vision not only to serve but to grow. The weakest link in the domestic market today is that marketing linkage. The efficiency in the retail network has not been potentially exploited. This is one of the reasons for the increase in the cost of product. The retailing in the domestic sector has slowly started
coming up but limited only to the branded players like Reebok, Adidas, Red tape etc; The merchandising technique thought retail showrooms in the unorganized sector has still not developed. Retail training of short term duration, at the institutional level is required to be started ¹.

The leather industry today is facing three C's- competition, consolidation & consumerism. Leather footwear retail outlets must endeavour to design products as perceived by user as cost effective & need based. In this context leather footwear retail outlets must identify the needs of present & prospective users & deliver quality products. Leather footwear retail outlets demand huge investments for acquiring sophisticated technology and qualified sales professionals for delivering quality products & brands and in turn expect reasonable return on investment. Conventional & rudimentary practices have not been able to realize the expected returns. Only a switch over to application of marketing principles and concepts can make a tremendous impact on the leather footwear retail outlets if they are designed properly.

As a matter of fact, the application of marketing principles has not reached its true potential in most of the retail outlets. Many of the footwear stores are unaware of result oriented marketing plans & strategies, which will ensure quality and attract greater number of customers. In this regard there is a necessity for integrating the marketing retail outlet so as to impose the performance. Marketing has numerous advantages for retail outlets, customers & in turn for society. These are improved performance of retail outlets, better utilisation of technologies, and improved
satisfaction of target market. Leather product’s marketing is a managerial device that enables design, positioning, pricing and promotion of value-added services with customers as its local point.

3.2 NEED FOR THE STUDY:

Leatherwear, it is felt, will be a happening area in future, especially so in the context of increasing demand for branded products within the country. The footwear sectors are a very significant segment of the leather Industry in India. India is the second largest global producer of footwear after China, accounting for 14% of global footwear production of 14.52 billion pairs. India produces 2065 million pairs of different categories of footwear (Leather footwear 909 million pairs, Leather shoe uppers 100 million pairs and Non-Leather footwear 1056 million Pairs). The Indian footwear industry provides employment opportunities to a total of 1.1 million people, mostly from the weaker sections of the society. Out of this, about 0.2 million are employed in the organized sector, 40% of who are women. India exports about 115 million pairs and nearly 95% of its production goes to meet its own domestic demand.

Footwear for domestic market is growing at a steady rate. Percapita use of footwear in India is gradually reaching global average. The demand for the products continues an uptrend, but more in the footwear area of special interest to youth and fashion. With the large human population and with increasing purchasing power, footwear industry needs to target the domestic market segment carefully.
Standing on the threshold of a retail revolution and witnessing a fast changing retail landscape, the Indian footwear market is set to experience the phenomenal growth in coming years. In the past few years too, the market has seen robust growth, says, "Indian footwear Industry Analysis" report. The Indian footwear retail market is expected to grow at a CAGR [Company annual growth rate] of over 20% from the period spanning from 2008 to 2011. Presently the Indian footwear market is dominated by men's footwear market that accounts for nearly 58% of the total Indian footwear retail market. The Indian footwear market is dominated by casual footwear market that makes up for nearly two-thirds of the total footwear retail market. As footwear’s retailing in India remained focused on men's shoes, there exists a plethora of opportunities in the exclusive ladies and kids footwear segment with no organised retailing chain having a national presence in either of these categories. The Indian footwear market scores over other footwear markets as it gives benefits like low cost of production, abundant raw material and has huge consumption market. The footwear component industry also has enormous opportunities for growth to each to increasing production of footwear of various types, both for export and domestic market.

Most of the leather firms are in an unorganised sector. The small scale industries, cottage and artisans sectors follow old and traditional methods of manufacture. As production processes are traditional, product quality cannot meet the international standard. The low quality product with limited variety has made many of the Indian leather units non-competitive given the nature of the leather industry,
modernisation of leather industry requires the following initiatives to make it efficient, agile, responsive and competitive namely to enhance productivity, reduce wastage, increased product design. Organised sector is not very active in catering to the needs of domestic footwear demand. Internal policies may need to be renewed in the light of cost of compositions of the footwear made for domestic market.

Ethnic footwear is a sub-sector of leather products which includes handcrafted footwear produced by artisans and traditional families. But today ethnic footwear industry in India is in a quite miserable state. Lack of standardisation, product deficiencies, lack of innovative and improved designs, competition from organised sector and cheap footwear producing firms, lack of proper marketing channels etc are few causes of the problems being faced by the Indian ethnic footwear industry.

The industry has also become more professional, providing product specific information to buyers and sellers as well as foreign market analysis. CLE has also recommended 15 integrated leather parks by 2011 in the country. India has a significant potential for higher share, highlighted.

Developing countries like India should have two pronged marketing strategy of simultaneously targeting both low price and high quality market rather than the traditional strategy of being a low price - low quality supplier.

The second annual global retail theft barometer 2008 survey, covering 920 large retailers across 36 countries has rated India with the highest shrinkage rate at
3.10% this year, an increase of 6.9% over last year this revolution has put India in the
topmost positions amongst countries worldwide closely followed by Thailand, South
Africa and Malaysia. In India most, retailers do not consider shrinkage as a major
concern.

Currently fashion is a key driver in the domestic market. A footwear
range that comprised 50 styles per season three years ago is now 200 styles strong. With
the spread of fashion consciousness across the country adding growth of leather
footwear, growth prospects in local markets are bright as well. Accordingly to the
estimate of a senior official of liberty shoes, a major brand in the domestic market, over
the next few years, the organized (Branded) Sector could grow at a rate of 10 to 15%.

To top into this market, branded players are trying to establish long drawn
associations and promotions with sporting events such as tennis and cricket matches at
various levels.

Study on marketing practices of leather footwear stores assumes
significance for the following reasons.

➢ Retail outlets are having the highest growth potential, but require implementation
   of marketing principles to earn reputation, to create brand image and to optimize
   the resource utilisation.

➢ The degree of acceptance of retail outlet is derived from the customer satisfaction
   & public relations.
The leather industry is customer driven and the success of the organization depends upon the ability to communicate, promote and deliver high quality products at a cost affordable by customers.

In the era of globalisation and privatisation, footwear emerged as a craze. Footwear shops need to integrate elements of marketing mix to satisfy the needs of the chosen marketing segments. The marketer’s choice or the knowledge of precise combination of these elements yields best results.

Footwear stores need to clearly understand the marketing mix elements for successful marketing. Marketing mix comprises of four P’S as they are popularly referred but footwear stores can combine any number of elements to design marketing mix like Product, Price, Place, promotion and Public relations. The expansion of marketing mix refers to the choice of marketing tools that a footwear shop combines to offer product that could satisfy the needs and wants of a particular marketing segment. The footwear industry that develops an optimum marketing mix will be the most successful.

The study attempts to fill the gap in the knowledge of marketing practices to be adopted in managing the elements of marketing mix by retail outlets. The study explores the ways and means of communicating, promoting and determining high quality products at a cost that people can afford. It is an exploration into current practices, possible modifications, and the possibility of making marketing goal oriented. The researcher strives to study the emphasis
given to marketing mix of products & promote suggestions to make footwear stores customers driven.

In this backdrop the study undertakes to test the following hypothesis.

3.3 REVIEW OF LITERATURE:

Jeffrey, in his study examined the trends in retailing, with special reference to large-scale outlets between 1850-1950 in Britain and also Jeffrey and derrick knee analysed in detail the structure of retail trade in Europe 9. “S.S. Dutta in 1972 found out the importance of leather with definite physical, chemical and biological properties so that they can be used in our daily life and industries 10. Srinivasan in his article has thanked the government for many of the facilities extended to the leather export trade’ 11. Sargunar in 1981 in voice journal stated that small and medium leather units suffer more than larger units 12. S.Aparna in 1986 in her case study “Impacts of the tanning industry on the physical and social environment” listed the various impacts on the total environment 13. In 1986 the Union commerce minister Mr.P.Shiva Shankar has observed that modernisation of the industry has undertaken but such a programme should ensure technology upgradation with employment generation.

Miguel korzeniewicz in 1992 examined the roles of Argentine leather production, Brazilian shoe manufacturing and American footwear consumption in shaping a leather-footwear global commodity network 14. G.V.Ramalingeswar Rao in
1996 has made an attempt to explore the socio-economic characteristics, business operations of retail business and highlighted the importance of retailing units in the development of economy. In the year 1998, M. Amiti remarked that significant positive growth was concentrated in leather products. In 1999, Peter Knorringa informed that informal artisanal employment conditions effectively pass on overall instability in the Agra footwear industry to the jatav community. Iqbal Haidari in August 1999 stated that the leather and leather made-ups industry plays a significant role in the economy of Pakistan and its share in GDP is 4%.

In November 2000, Mammo Muchie recommended that both countries need to formulate and implement the policies that will move the leather industry from raw and semi-processed production outwards to the leather products and leather goods sub-sectors. Andrew Glyn in the year 2004 referred that imports constituted 80% of U.S. consumption for leather products, 57% for apparel. Sankar U in 2001 remarked India's international competitioners in leather products may be eroded under some new policy initiatives taken by the Government.

A. Amudeswari and A. K. Verma in 2004 reported that Central Leather Research Institute (CLRI) has also gained prior experience working in networked fashion with six of the nine partnering CSRI institutions through earlier programs. Mr. Gautam Gopalakrishnan, Mr. Md Sadiq, K.V. Satish and Mr. BN Das in 2005 explained about raw material resources, manufacturing cluster and strong dynamic components of an industry.
K.Hoang and A.Nachimuthu in the year 2005 highlighted that the success of automatically grading leather hide will not only provide the tanner with a means of accurately defining the price of a leather hide but also greatly assist the footwear manufacturer in the most optimal nesting of irregular shoes parts within a given hide.

In July 2006 Jici Wang explained that the footwear industry, one of the china’s traditional low technology sectors has been viewed as a sunset activity.

Sankaran in 2006 identified the growing domestic demand for footwear and identified the role of human resources development to enhance productivity.

P.R. Raghavendran noted that India has earned a place of distinction for herself in the world in leather manufacture and technology. Leather industry in India is developing because the Govt of India has set up the Bharath leather corporation to promote the development of the leather industry.

According to G.Chandrasekhar (2007) the organised retail sector has the potential to contribute to the transformation of the country’s moribund agriculture sector and appropriate policies helping all kinds of customers as well as big and small retailers. Amatul Baseer and G.lakshmi Prabha in 2007 published a paper on the problems and prospects of Indian retailing; they say there are vast opportunities for retailing in India.

Arvind singhal in 2007 studied the economic impact on Indian traditional retailers, confirmed to perhaps 3 lakhs to 5 lakhs retailers across India largely in
relatively small towns, come in direct range of about 1000 hypermarkets and about 300+
supermarkets by 2011. B. Srinivasa Raju and Krishna Reddy in 2007 published a
paper on organised and unorganised retailing. They found the retail sense changing
really fast.

Dr. Musime Andrew in 2007 has examined the retail marketing culture and
the theoretical understanding between the customer and the entrepreneur. The result
found by him and the market culture possessed by the companies was different.

K.K. Pandey in 2007 pointed out the revolution in retailing industry has
brought many changes opening the door for many Indian as well as foreign players.
Kamalnath had the Commerce and Industry ministry publish the IMAGES INDIA
RETAIL REPORT 2007. The work states that retail employs the second largest number
of people after agriculture. Malcolm voice (2007) mentions that the Indian retail trade
is growing faster in the world.

Ms. Mayavati chief minister U.P. took severe action in 2007 banning the mode,
rent retail shopping mall, keeping in mind the safety and security of the unorganised
retailers. In 2007 Michele Alessandrini, Bassan fattouh and Pasquale Scaramozzino in
their article stated that during the 1990’s, many sectors including leather remained
under a license regime.

Mr. Mukhtarul Amin in 2009 positively asserts that despite global meltdown,
Indian leather industry has a promising future in the global market. Juyeon Park,
Marilyn Delong in July 2009 explored the current phenomenon of user-technology negotiation associated with new technology adoption in the apparel and footwear industry.”

3.4 HYPOTHESIS:

1. Marketing orientation of the leather footwear retail outlets is directly related to the form of ownership. Proprietorship retail outlets exhibit high market orientation than partnership retail outlets.

2. Marketing orientation of leather footwear stores is directly related to volume of investment. The higher the volume of investment, the higher the marketing orientation.

3. Marketing orientation of shops is related to frequency of new products and designs display. The higher the frequency of new products and designs, higher the marketing orientation.

4. Marketing orientation is influenced by number of branches in different locations. The higher the number of branches higher is the marketing orientation.

5. Marketing orientation of leather stores is directly related to brand portfolio offered. The large the brand portfolio the higher is the marketing orientation.

6. Attitude of the retail outlets towards marketing leather footwear directly influences marketing orientation.

7. Available of different types of footwear can be related to marketing orientation. More the categories of footwear higher are the marketing orientation.
8. Volume of investment directly influences the price of products. Higher the volume of investment higher is the price.

9. Extent of tie-up with other players with in the footwear retail industry does influence sales growth. More the tie-ups with number of players higher are the sales growth.

10. Perceived level of competition has direct bearing on marketing orientation higher the present level of competition higher is the marketing orientation.

11. Marketing orientation of the retail outlets is related to the retail on investment. Higher the return on investment lower is the marketing orientation.

To test the above hypothesis the study is under taken with the following objectives:-

3.5 OBJECTIVES OF THE STUDY:

1. To identify the socio-economic origins of selected respondents.

2. To study the relevance and scope of marketing in selected footwear retail outlets.

3. To study the design of planning product mix.

4. To evaluate the pricing strategies of various footwear retail outlets.

5. To analyse the strategies adopted by the retail outlets for the promotion of their products

6. To evaluate the location strategies of retail outlets and

7. To suggest ways and means for strengthening retail outlets for better marketing.
3.6 SCOPE AND METHODOLOGY:

Though the researcher wishes to cover the entire leather industry, its orientation towards marketing for arriving at meaningful conclusions, due to paucity of time and other constraints the researcher has decided to limit his area of study to marketing practices of leather footwear retail units in the selected districts (Chennai, Vellore & Erode) in Tamil Nadu.

Retail stores can be divided into two categories

1) Sole Proprietorship:

Stores in this category are owned by an individual. They have unlimited liability.

2) Partnership outlets:

These stores have two or more partners but not more than 20. They have unlimited liability and profits are shared among partners as per their capital ratio.

The Researcher undertakes the study of footwear retail stores, which includes both proprietorship and partnership. A preliminary survey reveals that footwear retail outlets are confirmed to mainly urban areas. It was also identified that majority of the footwear stores are located in Chennai (Leather capital of India), Tamil Nadu.
Table 3.1: Total Leather Footwear stores in Tamilnadu (Chennai, Vellore & Erode).

<table>
<thead>
<tr>
<th>Form of Organisation</th>
<th>Number of Retail Outlets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proprietorship</td>
<td>340</td>
</tr>
<tr>
<td>Partnership</td>
<td>180</td>
</tr>
<tr>
<td>Total No. of Leather Footwear Stores</td>
<td>520</td>
</tr>
</tbody>
</table>

Mostly all the retail outlets are confined to urban areas.

Table 3.2: Location of Leather footwear stores in Tamilnadu (Chennai, Vellore and Erode).

<table>
<thead>
<tr>
<th>Location</th>
<th>PROPRIETORSHIP</th>
<th>PARTNERSHIP</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chennai</td>
<td>198</td>
<td>122</td>
<td>320</td>
</tr>
<tr>
<td>Vellore</td>
<td>90</td>
<td>40</td>
<td>130</td>
</tr>
<tr>
<td>Erode</td>
<td>52</td>
<td>18</td>
<td>70</td>
</tr>
<tr>
<td>Total</td>
<td>340</td>
<td>180</td>
<td>520</td>
</tr>
</tbody>
</table>

The study is mainly of descriptive nature but a set of statistical tools have been adopted to make the study analytical and tries to evaluate the marketing mix of leather footwear stores.
In general, probability sampling procedure and in specific, stratified random sampling technique has been adopted to select the sample. The study classified the retail outlets into two strata, based on form of organizational setup. The researcher selects a sample giving due importance for both proprietorship and partnership Outlets. Approximately 69% of the population i.e. 360 footwear stores have been selected. The sample includes a mix of proprietorship and partnership retail outlets in the ratio of 5:3.

Table 3.3:- Sample mix of proprietorship and partnership Retail outlets

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Proprietorship leather</td>
<td>220</td>
</tr>
<tr>
<td>footwear retail outlets</td>
<td></td>
</tr>
<tr>
<td>Partnership leather</td>
<td>140</td>
</tr>
<tr>
<td>footwear retail outlets</td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>360</td>
</tr>
</tbody>
</table>

To make the sample more representative of the entire state, sample has been selected from the three districts of Tamilnadu namely Chennai, Vellore & Erode.
Table 3.4: - Location of selected footwear stores in Tamilnadu (Chennai, Vellore and Erode).

<table>
<thead>
<tr>
<th>Location</th>
<th>No. of Footwear stores</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Proprietorship</td>
</tr>
<tr>
<td>Chennai</td>
<td>146</td>
</tr>
<tr>
<td>Vellore</td>
<td>42</td>
</tr>
<tr>
<td>Erode</td>
<td>32</td>
</tr>
<tr>
<td>Grand Total</td>
<td>220</td>
</tr>
</tbody>
</table>

The number of leather footwear stores in Chennai is more followed by Vellore and Erode districts. Chennai comprises of 67% of footwear stores, the maximum of the sample. Vellore district comprises of 20% of footwear stores. Erode has 13% of leather footwear stores which is the least of the selected sample because of the dominance of the power loom and handloom weaving, rice milling and edible oil expelling units.

3.7 DATA SOURCES:

The study is based on primary and secondary sources of data. The main sources of primary data are the selected retail outlets in Tamilnadu. Data collected through primary source consists of information collected through structured
Questionnaire. The secondary source of data consists of information collected through booklets, national dailies, journals, magazines, publications and reference books etc.

This study is based on primary and secondary sources of data.

**Primary Data:-**

Primary data is collected from the selected retailers by administering structured questionnaires. The questionnaires comprises of various questions relating to stores. The timing for administrating the questionnaire was fixed by prior appointment with the store owners. The authorities of the store owners who responded to questionnaire varied designation-wise from shop to shop. Managing directors, public relations officer, marketing manager etc:

**Secondary Data:-**

Secondary data is collected from journals, magazines, booklets, national dailies, publications and other reference books. They are:-

* Leather line
* Business line daily
* The Hindu daily
* Financial express daily
* Indian express daily
* Business week
Secondary data is also collected from various websites on the internet. The websites researcher used for information is:-

- www.about.com
- www.leathervocabulary.com
- www.leatherindia.org
- www.hoovers.com
- www.brownshoe.com
- www.petaindia.com
- www.lots of essays.com
- www.kanpurbds.com
- www.indian leather portal.com
- www.rsc.org
- www.sciencedirect.com
- www.bata.com
- www.leathernet.com

The required literature, the secondary data and bibliography were collected from the following documentation centres by spending considerable amount of time at different places during 2003 – 2008.
In addition to the above personal interview were made with managers & sales persons in Chennai to know the various aspects of leather footwear marketing this was very helpful in preparing questionnaires and conducting further researches.

In addition to the above some supporting data was also collected from the published and unpublished records, reports etc.

3.8 STATISTICAL TOOLS USED:

The primary and secondary data was collected for the purpose of study and a series of statistical tools such as chi-square test, spearman's rank and percentages are also used. Apart from that to make the study more interesting and informative pie diagrams, bar diagrams etc, are also used.
3.9 PERIOD OF THE STUDY:

The study broadly covers five years i.e. 2003-2008. The rationale behind choosing this period particularly is due to the fact that in this period the retail sector in India was flourishing. During this period many number of footwear retail outlets have transformed their retail formats to become more life style oriented and are positioning themselves as vibrant and contemporary Indian brands. Apart from that there is an increase in the upper middle class segment that is looking for quality products.

3.10 PRESENTATION OF THE STUDY:

The entire study has been divided into six chapters.

Chapter I: - Is introductory in nature and provides the necessary background on Indian leather footwear retail Industry

Chapter II: - Deals with products marketing, marketing of leather footwear products and a literature review relating to this present study.

Chapter III: - Deals with the statement of the problem, need, scope, methodology and limitations of the study.

Chapter IV: - Covers profile of the selected leather footwear retail units and presents analysis of various marketing practices adopted.
Chapter V: - Deals with empirical study of leather footwear stores to describe problems & Prospects.

Chapter VI: - Provides summary, conclusions & suggestions.

3.11 LIMITATIONS OF THE STUDY:

1. The present work is confirmed to proprietorship and partnership stores in Tamilnadu. Hence conclusions drawn from this study may not be generalised to other than these stores.

2. The study results are mainly derived from the primary data. The relative length of the questionnaire resulted in non-responses for sometimes. Information on some of these items available from secondary sources. Hence, precision in the results may have lost.

3. The study failed to provide the list of leather shoe shops selected for survey in order to preserve confidentiality.

4. Retailers gave the details through their friends and relatives.

5. The employees of the retailers gave the information orally.

An earnest attempt is made, despite limitations to arrive at a fairly objective and representative assessment-inferences or conclusions.
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121