CHAPTER - II
EVOLUTION OF RETAIL MARKET

2.0. INTRODUCTION

The Indian Retail Industry is one of the fastest growing industries over the past couple of years in the world as substantiated by the rankings achieved by it by Global Retail Development Index (GRDI). However since the last quarter of 2008, the industry has been affected by various factors like low economic growth rate, high interest rates and the liquidity crunch, coupled with pressure on consumer discretionary expenditure. The industry was also affected by the high cost of real estate rents during much of calendar year 2008. Amid these pressures, most retailers have experienced a drop in footfall and demand, which in turn reflected in drop in store sales growth and greater time to break even for new stores. In a deteriorating macroeconomic climate, retailers are offering promotional offers to maintain volumes which would however drive down margins.

2.1. Market Share of Product Categories in the Retail Market of India.

(Source Indian Journal of Marketing 2007, p-40)

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clothing and Textile</td>
<td>40</td>
</tr>
<tr>
<td>Food and Grocery</td>
<td>10</td>
</tr>
<tr>
<td>Foot wear</td>
<td>9</td>
</tr>
<tr>
<td>Consumer Durables</td>
<td>6</td>
</tr>
<tr>
<td>Furniture</td>
<td>9</td>
</tr>
<tr>
<td>Jewellery</td>
<td>5</td>
</tr>
<tr>
<td>Music, Gift and Mobiles</td>
<td>3</td>
</tr>
<tr>
<td>Electronic Items</td>
<td>8</td>
</tr>
<tr>
<td>Others</td>
<td>10</td>
</tr>
</tbody>
</table>
2.2. Configuration of Retail Industry.

![Configuration of Retail Industry](image)

2.3. Favorable features to the Indian Retail Market

- There has been a boom in the retail trade in India owing to a gradual increase in the disposable income of the middle-class households. More and more players are venturing into the retail business in India to introduce new attractive retail formats like malls, supermarkets, discount stores, department stores and even changing the traditional look of the bookstores, chemist shops and furnishing stores. Food sales constitute a high proportion of the total retail sales. The share was 62.7% in 2001, worth approximately Rs.7039.2 billion, while nonfood sales were worth Rs.4189.5 billion. However, the non food retailing sector registered faster year-on-year growth than food sales. India has a large and aspiration middle-class of 75 million households or 300 million individuals. Middle-class consumers want products which are value-driven.

- India also has 500 million Indians under the age of 25. Young Indians are driving purchases in mobile phones, fashion, accessories, food and beverages, quick service restaurants, etc. Young Indians have access to more money than before and with this has come independence, aspirations and a demand for products.
• According to the 2010 World Wealth Report by Cap Gemini and Merrill Lynch

Wealth Management, the rise in the total number of millionaires (or Indians with investible assets, excluding main residence and consumer durables, of more than US$1 million) grew almost 51%, the second fastest in the Asia-Pacific region.

• The 700 million Indians residing in rural India are an opportunity that retail and consumer (R&C) companies cannot ignore. Penetration levels for several products, such as personal care, hair care, skin care, consumer durables and electronics are low in rural India.

Retail and consumer companies who localize their products for this market, with regard to price points, packaging, stock-keeping units (SKU) size, promotion, will succeed. Since 2005-06, India has been growing at average GDP of 8.6%. Foreign investment into India is increasing and Indian companies are stepping outside their national boarders to acquire companies overseas. Incomes are increasing and capital markets are buoyant reflecting the strength of the company. Studies have also ranked Indian consumers as some of the most confident in the world. The more confident consumers are about the strength of the economy, their personal finances, their career growth, etc., the more they will increase their consumption, purchase non-essential products, experiment with products, brands, categories, etc.

2.4 HYDERABAD MARKET SCENARIO

The retail sector is growing with tremendous market pace with almost all retail brands in the market having their presence in Hyderabad. In fact the demand is far out growing the supply. However the market continues to be in a significant short supply situation.

The old CBD, which is characterized by various unorganized retail formats and infrastructural short comings is made up of areas like Abids, Liberty X Road, Basheer Bagh and S.D. Road. Theses are already congested and there is a limited scope for the supply of new retail space. The existing CBD has witnessed the significant growth in the presence of national & international retailers. Some of the prominent retail operators in this area are Lifestyle, Shopper Stop, Pantaloons, Central, etc. This area has also witnessed the growth of high streets thanks to the surrounding upscale residential catchments and its proximity to the IT/ITES hub. Lately, this market has
The third area which constitutes Banjara Hills (Road No. 1, 2, 10 &12) and Jubilee Hills (Road No.36) is the emerging retail destination with presence of high street retail formats. This zone also has organized retail malls such as GVK One, City Center, Ashoka Metropolitan; etc which is the most sought after destination across Hyderabad. Inorbit Mall at Mindspace of approximately 550,000 Sft and presently under construction will take care of the retail requirements of the populace residing in Miyapur, Kukatpally, Madhapur and Kondapur, which surrounds the main hub of IT/ITES activity. Newer malls planned in this area are Madhucon, RMJ, IJM, Lanco Hills Mall, etc.

The supply of newly constructed retail space will play a critical role and the CBD and the peripheral areas will also experience a change in 2007. The retail activity and establishments will become more pronounced in the new residential and office locations of the city like Madhapur, Kukatpally, Dilsukhnagar and Uppal etc.,

There is a huge untapped potential for high quality shopping malls, liberalization of FDI norms will create opportunities for overseas investors and mall developers and operators. This will also increase the investment opportunities for domestic investors.

The continued upswing market is expected to support the further expansion of organized retail growth in Hyderabad. There is a scope for further development especially for malls and multiplex in the areas of suburbs like Gachibowli, Madhapur, Kukatpally and Dilsukhnagar owing to the today’s retail scenario. Food courts, Multiplexs and Pool parlours are mushroomed in various parts of Hyderabad. Banjara Hills and Jubilee Hills are being the prime residential areas, are picking up in terms of demand due to some new developments offering quality retail space and retail property values here range from USD 25-30 sq.ft. per annum. Yields are currently in the range of 9-12% per annum. There are number of projects under construction stage.

Hyderabad Retail business sector is very large industry, this in both in terms of establishments and employees. In India, every year the Retail Industry generates 12,000 crores in terms of retail sales. The Retail Sector is also one amongst the largest worldwide business zones.
2.5. HYDERABAD RETAIL MARKET DETAILS

Evaluation of Customer Perception Process 44

Net Absorption thousand sq. ft  
- Net absorption Vacancy and Rental Rates  
- Four Quarter Average

2.6. HYDERABAD STATISTICAL SUMMARY

<table>
<thead>
<tr>
<th>Submarket</th>
<th>Inventory (Sq. ft.)</th>
<th>Construction (sq. ft.)</th>
<th>Deliveries (sq. ft.)</th>
<th>Vacancy 2006 (sq. ft.)</th>
<th>2006 (sq. ft.)</th>
<th>USD per sq. ft. per annum</th>
</tr>
</thead>
<tbody>
<tr>
<td>CBD-1 Himayathnagar, Abids, Basheerabagh</td>
<td>346,42</td>
<td>53,500</td>
<td>0</td>
<td>1%</td>
<td>45,000</td>
<td>$49.07</td>
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<tr>
<td>CBD-2 SD Road, SP Road, Secunderabad</td>
<td>174,500</td>
<td>20,000</td>
<td>100,000</td>
<td>0%</td>
<td>60,000</td>
<td>$62.84</td>
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<tr>
<td>CBD-3 Begumpet, Rajbhavan Road, Banjara Hills, Jubilee Hills</td>
<td>817,347</td>
<td>57,610</td>
<td>226,350</td>
<td>4%</td>
<td>46,000</td>
<td>$71.45</td>
</tr>
<tr>
<td>Suburbs Madhapur, Gachibowli, Kukatpally, Dilsukhnagar, etc.,</td>
<td>1,252,400</td>
<td>127,400</td>
<td>300,000</td>
<td>4%</td>
<td>240,000</td>
<td>$66.29</td>
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<tr>
<td><strong>Total</strong></td>
<td><strong>2,592,672</strong></td>
<td><strong>258,510</strong></td>
<td><strong>626,350</strong></td>
<td><strong>2%</strong></td>
<td><strong>346,000</strong></td>
<td><strong>797,500</strong></td>
</tr>
</tbody>
</table>

The retailing industry in Hyderabad is come into big Shopping Malls and huge departmental stores and retail chains like Big Bazaar, Shopper Stop and Metro. The employment opportunities in Hyderabad Retail are highly increased and have nice financial rewards also. The big names in the Retail Marketing like Shoppers Stop, Pantaloon Retail, Lifestyle, Big Bazaar and Spencer's are already invested huge money in Hyderabad Retail industry. In the next two years thousands of jobs will be generated in this Hyderabad Retail Industry. In the next two years thousands of jobs will be generated in this Hyderabad Retail Industry. In the next two years thousands
of jobs will be generated in this Hyderabad Retail Sector. Integrated retailing like retail cum entertainment is booming at a great pace in Hyderabad city. Growth in the field of online shopping is also an important factor that helps in enhancing the business in the business in Hyderabad Retail Sector.

Overall the Hyderabad Retail Business Sector has large opportunities for prospective business persons. Within the Hyderabad, retail sector generating fair profits, it would be beneficial for investors to tap it exactly in the manner in which they want.

2.8 BIG BAZAAR MARKET HISTORY

Big Bazaar is part of Future Group, which also owns the Central Hypermarket, Brand Factory, Pantaloons, eZONE, HomeTown, KB's Fair Price to name a few and is owned through a wholly owned subsidiary of Pantaloon Retail India that is listed on Indian stock exchanges

Big Bazaar was launched in September, 2001 with the opening of its first four stores in Calcutta, Indore, Bangalore and Hyderabad in 22 days. Within a span of ten years, there are now 152 Big Bazaar stores in 90 cities and towns across India.

Big Bazaar was started by Kishore Biyani, the Group CEO and Managing Director of Pantaloon Retail. Though Big Bazaar was launched purely as a fashion format including apparel, cosmetics, accessory and general merchandise, over the years Big Bazaar has included a wide range of products and service offerings under their retail chain. The current formats includes Big Bazaar, Food Bazaar, Electronic Bazaar and Furniture Bazaar. The inspiration behind this entire retail format was from Saravana Stores, a local store in T. Nagar, Chennai.

The stores are customized to provide the feel of mandis and melas while offering the modern retail features like Quality, Choice and Convenience. As the modern Indian family's favorite retail store, Big Bazaar is popularly known as the "Indian Walmart".

On successful completion of ten years in Indian retail industry, in 2011, Big Bazaar has come up a new logo with a new tag line: 'Naye India Ka Bazaar', replacing the earlier one: 'Isse Sasta Aur Accha Kahin Nahin'.

Evaluation of Customer Perception Process
2.9. 3-C Theory

According to Kishore Biyani's 3-C theory, Change and Confidence among the entire population is leading to rise in Consumption, through better employment and income which in turn is creating value to the agricultural products across the country. Big Bazaar has divided India into three segments:

**India one:** Consuming class which includes upper middle and lower middle class (14% of India's population).

**India two:** Serving class which includes people like drivers, household helps, office peons, liftmen, washer men, etc. (55% of India's population) and

**India three:** Struggling class (remaining 31% of India's population).

While Big Bazaar is targeted at the population across India one and India two segments, Aadhaar Wholesale is aimed at reaching the population in India three segment. With this, Future Group emerged as a retail destination for consumers across all classes in the Indian society.

2.10. TIME LINE OF BIG BAZAAR

Big Bazaar at Sarkhej Gandhinagar Highway in Ahmedabad

**2001**

- Three Big Bazaar stores launched within a span of 22 days in Kolkata, Bangalore and Hyderabad

**2002**

- Big Bazaar - ICICI Bank Card is launched.
- Food Bazaar becomes part of Big Bazaar with the launch of the first store in Mumbai at High Street Phoenix

**2003**

- Big Bazaar enters Tier II cities with the launch of the store in Nagpur
- Big Bazaar welcomes its 10 million-th customer at its new store in Gurgaon
2004

• Big Bazaar wins its first award and national recognition. Big Bazaar and Food Bazaar awarded the country’s most admired retailer award in value retailing and food retailing segment at the India Retail Forum

• A day before Diwali, the store at Lower Parel becomes the first to touch Rs 10 million turnover on a single day

2005

• Initiates the implementation of SAP and pilots a RFID project at its central warehouse in Tarapur

• Launches a unique shopping program: the Big Bazaar Exchange Offer, inviting customers to exchange household junk at Big Bazaar

• Electronic Bazaar and Furniture Bazaar are launched

• Big Bazaar and **ICICI Bank** launched ICICI Bank-Big Bazaar Gold credit card program to reward its loyal customers.

2006

• Mohan Jadhav sets a national record at Big Bazaar Sangli with a Rs 1,37,367 shopping bill. The Sangli farmer becomes Big Bazaar’s largest ever customer.

• Big Bazaar launches Shakti, India’s first credit card program tailored for housewives

• Navaras – the jewellery store launched within Big Bazaar stores

2007

• The 50th Big Bazaar store is launched in Kanpur

• Big Bazaar partners with Futurebazaar.com to launch India's most popular shopping portal

• Big Bazaar initiates the "Power of One" campaign to help raise funds for the Save The Children India Fund
• Pantaloon Retail wins the International Retailer of the Year at US-based National Retail Federation convention in New York and Emerging Retailer of the Year award at the World Retail Congress held in Barcelona.

2008

• Big Bazaar becomes the fastest growing hypermarket format in the world with the launch of its 101st store within 7 years of launch

• Big Bazaar dons a new look with a fresh new section, Fashion@Big Bazaar

• Big Bazaar joins the league of India’s Business Super brands. It is voted among the top ten service brands in the country in the latest Pitch-IMRB international survey

• Big Bazaar initiated the Mega Saving "Monthly Bachat Bazaar" campaign, to provide exceptional deals on groceries and food items during the first week of every month.

2009

• Big Bazaar opens its second store in Assam at Tinsukia

• Big Bazaar initiates Maha Annasantarpane program at its stores in South India – a unique initiative to offer meals to visitors and support local social organizations

• Big Bazaar captures almost one-third share in food and grocery products sold through modern retail in India

• Mahendra Singh Dhoni and Asin, youth icons of India, were chosen as the brand ambassadors of Big Bazaar

• Big Bazaar announced the launch of ‘The Great Exchange Offer’

• Formed a joint venture with Hidesign to launch Holi, a new brand of handbags, laptop bags and other accessories.

2010

• Future Value Retail Limited is formed as a specialized subsidiary to spearhead the group’s value retail business through Big Bazaar, Food Bazaar and other formats.
• Big Bazaar wins CNBC Awaaz Consumer Awards for the third consecutive year. Adjudged the Most Preferred Multi Brand Food & Beverage Chain, Most Preferred Multi Brand Retail Outlet and Most Preferred Multi Brand One Stop Shop.

• Big Bazaar connects over 30,000 small and medium Indian manufacturers and entrepreneurs with around 200 million customers visiting its stores.

• Big Bazaar opens its third store in Kanpur at Z Square Mall.

• Big Bazaar opens its fourth store in Kanpur at Jajmau which is the largest leather tannery garrison of Asia.

• Vidya Balan was chosen as the brand ambassador of Big Bazaar’s Price Challenge exercise.

• Ranked 6 among the Top 50 Service Brands in India.

2011

• Big Bazaar forays into the rural wholesale and distribution business through ‘Aadhaar Wholesale’ store at Kalol, Gujarat.

• Big Bazaar has come up a new logo with a new tag line: ‘Naye India Ka Bazaar’.

• 200th store opened in India.

• Future Group has launched its latest venture, Foodhall – a premium food destination across 10 metros in India.

• For the convenience of the online customers, Big Bazaar has started free shipping on all orders above Rs. 1000.

• Entered into an agreement with Hindustan Unilever to co-develop and co-brand bakery products, which would be sold exclusively at Big Bazaar stores.

2012

• Big Bazaar entered into a five year multi-million dollar deal with Cognizant Technology Solutions for IT infrastructure services that support Future Group’s network of stores, warehouses, offices, and data centers.
• Partnered with Disney to launch "Kidz Cookies", exclusively for kids across India.

• Big Bazaar is planning to add further value to its retail services by offering Value added services like grinding, de-seeding, vegetables cutting at free of cost.

2.11. List of Big Bazaar Market Outlets in Hyderabad:

<table>
<thead>
<tr>
<th>Name of the Area</th>
<th>Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>Abids</td>
<td>Maheshwari Palace Mall Palace Talkies Compound #4-1-833 Opp To G.P.O. Abids Hyderabad-500001 Phone:+91 40-4260 7039</td>
</tr>
<tr>
<td>RTC X Roads</td>
<td>1-8-557 Chikkadpally Beside Odeon Theatre Hyderabad-500029 Phone:+91 40-66571111</td>
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<tr>
<td>L.B.Nagar</td>
<td>3-12-59 Ring Road Mansoorabad L.B.Nagar Road Besides Kamineni Hospital Hyderabad - 500068 Phone:+91 40-64578237,64560280</td>
</tr>
<tr>
<td>Tarnaka</td>
<td>Saadath Plaza Opposite Aradhana Theatre New Flyover Tarnaka Hyderabad-500019</td>
</tr>
</tbody>
</table>
2.12. Spencer’s Super Market Outlets History

Since 1863, Spencer’s has been a part of the Indian retail landscape. At one time, the Spencer’s Empire stretched from Peshawar to Cochin, from Karachi to Chittagong, spanning the length and width of undivided India. Originally owned by a British gentleman – yes, there was a Mr. Spencer (John William Spencer, to be precise) – it acquired Indian ownership in the 1960s, and became part of the RPG Group in 1989.

In 1995, RPG Enterprises, the flagship company of the RPG Group, launched Food world as a joint venture with Hong-Kong based Dairy Farm International. The joint venture, which operated supermarkets under the name “Food world” and hypermarkets under the name “Giant”, was terminated in 2006. RPG retained 48 of the 93 stores it owned. These were refurbished and their launch under the brand name, Spencer’s, kicked off a new phase in both the history of the Spencer’s brand, and the retail in India.

Since inception Spencer’s has been a consumer-centric brand, constantly innovating, pioneering formats, evolving over time but always keeping consumer needs and satisfaction center-stage. Back in 1920, we were the first grocery chain in India. In 1980, we became the first supermarket chain, and in 2001, we introduced India to the joys of hypermarket shopping.

What has remained unchanged almost 150 years is the trust the Spencer’s brand evokes. To the consumer, it carries the promise of innovation, quality, and service; the confidence that they will always be able to find a Spencer’s at a convenient location;
that it will have a pleasant ambience; and that it will offer a wide range of products at affordable prices.

2.13. Differentiators

In the Indian milieu, there are only two routes to survival – discounting and differentiation. Most retailers choose to play the price game. We, however, preferred to focus instead on establishing ourselves as the preferred shopping destination for discerning young customers looking for a range of quality products that let them participate in a global lifestyle.

Our brand positioning – Makes Fine Living Affordable – embodies this approach, delighting shoppers with the best products and services that enable a fine living at reasonable prices while providing them with a warm, friendly and knowledgeable retail environment.

The following characteristics distinguish the Spencer’s brand and create memorable 360º shopping experiences for consumers:

- Products – we offer the widest range of food and lifestyle (fashion, home, entertainment) brands, with a special expertise in food
- Quality – we lay a huge emphasis on all-round quality: in products, stores, service standards, and customer engagement programs and that too since our inception at 1863
- Heritage – we are India’s oldest retailer, with many firsts to our credit
- Multiple Formats – from daily to weekly and specialty shopping, we fulfill every need and provide maximum convenience
- Promotions – we seek to offer the right products at the right time at the right price, with promotions carefully designed to suit the buying cycle and shopping basket of the consumers
• Brand Imagery – our stores and staff seek to make our customers feel right at home, being international, contemporary, accessible, empathetic and trusted

2.14. Own brands

Private Brands in Spencer’s offer a wide range of products from food, personal care, fashion to home utility items. Spencer’s Smart Choice, Tasty Wonders, Clean Home and Maroon are some of our brands which host a varied choice that fulfils almost all needs of a modern household. Rice, pulses, whole spices, dry fruits and nuts, sauces, instant noodles, breakfast cereals, honey, breads, beverage, wafers, pickles, jams and cookies- to name a few in our food range. While our personal care range covers face wipes, tissues, baby needs, hand wash etc. Detergents, dish wash, toilet cleaners, floor cleaners support the home needs. What’s more- our pickles are customized to regional flavors as well. Our South Indian range of pickles has a wide assortment catering to regional tastes.

Maroon is a brand for premium home care solutions. From cooking to serving-Maroon is your complete kitchen partner. From a range of premium storage and kitchen utensils, to beautifully designed melamine ware and foil wraps, you will also find smart backpacks and convenient travel accessories. Fruits and Vegetables. Another category where our Private Brand Spencer’s Nature’s Best offers you freshly packed greens which include some select exotic herbs and aromatic ingredients.

In fashion, we have choices, both contemporary and classic. Sporty or stylish, as you prefer. Office or occasion-specific formals, casuals for lounging or leisure, and accessories like leather items, junk jewelry and footwear to complete the look. Trendy designs in comfortable fits and cheerful colours, to express personal style. Some of our popular labels are Island Monks and Mark Nicolas (both for men and women), Asankhya (women’s ethnic wear), Scorez (sportswear), La Bonita (footwear). Your quest for fashion ends right here. All our private brand products are conveniently priced and come with a promise of great quality. All these brands and products are available in all stores.

Spencer’s Retail Limited is a multi-format retailer providing a wide range of quality products to discerning young customers - well-travelled citizens of the world, looking out for authentic flavors and experiences in a fun-filled shopping environment. Our
brand positioning – Taste the World – embodies this approach, delighting shoppers with the best that the world has to offer in terms of interiors, ambience and merchandise.

Part of the Rs 15,500 crore RPG Group, we run about 250 stores (including about 29 large format stores) across 50 cities in India, employing more than 6,000 people. As one of the earliest entrants in the retail space in India, we have been instrumental in introducing Indian consumers to the concept of organized retailing, becoming the country’s first grocery chain back in 1920, and offering the joys of hypermarket shopping in 2001.

A “food first” retailer we offer both fresh and packaged foods as well as groceries. We also have a wide selection of electronics and electrical equipment, home and office essentials, garments and fashion accessories, toys, and personal care.

2.15. List of Spencers Super Market Outlets in Hyderabad:

<table>
<thead>
<tr>
<th>Name of the Area</th>
<th>Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ameerpet</td>
<td>Great Wholesale Club Ltd d.No.7-1-209 &amp; 209 A Besides Satyam Talkies Ameerpet Hyderabad-500007 Phone:+91 40-23746001 / 02 / 04</td>
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<tr>
<td>Raj Bhavan road</td>
<td>Spencers Retail Ltd.</td>
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<tr>
<td>Location</td>
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<td>Tolichowk</td>
<td>D.No.6-3-1073 Magestic Heights Rajbhavan Road Somajiguda Habsiguda D.No.6-3-1073 Magestic Heights Rajbhavan Road Somajiguda Hyderabad-500082 Mobile:+91 9989057845</td>
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<td>Motinagar</td>
<td>Great Wholesale Club Ltd D.No. 8-1-21/6 Baniq Residency Surya Nagar Phone:+91 40-23560760 Mobile:+91 9989057847</td>
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<tr>
<td>K.P.H.B.Colony</td>
<td>Great Wholesale Club Ltd Plot No. 111 &amp; 112 Balaji Swarnapuri Colony Hyderabad-500018 Phone:+91 40-23835330 Mobile:+91 9989057848</td>
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<tr>
<td>Habsiguda</td>
<td>Great Wholesale Club Ltd Sai Heights Plot No.19A &amp; 19B Survey No.24/1 &amp; 24/2 Street No.8 Phone:+91 40-22715750 Mobile:+91 9989057851</td>
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<tr>
<td>Tilak Nagar</td>
<td>Great Wholesale Club Limited</td>
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| Himayath Nagar    | Muddasani Classic  
D.No.2-2-1075/15/1 To 5  
Phone:+91 40-27400306  
Mobile:+91 9908366696 |
|                  | **Himayath Nagar**  
Spencers Retail Ltd  
3-6-262,Ground Flor  
Tirumala Estate  
Old Mla Quarters Road  
Hyderabad-500029  
Phone:+91 40-23227894  
Mobile:+91 9989057843 |
|                  | **Saidabad**  
Spencer's Retail Ltd  
House No: 16-2-835/A/1/F  
Near Mask  
Saidabad Main Road  
Hyderabad-500059  
Phone:+91 40-24162636  
Mobile:+91 9959698883 |
|                  | **Telephone Colony**  
Spencer's Retail Ltd  
Shop No 9,10 &11  
Spring Orchids  
R.K.Puram  
Road No 1  
Telephone Colony  
(Near Saroornagar)  
Hyderabad-500035  
Phone:+91 40-24030310  
Mobile:+91 9959698667 |
|                  | **Kukatpally**Spencers Retail Ltd.  
No.11 To 14 & 21 To 24  
Ground Floor |
<table>
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<td>Vivekananda Nagar</td>
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<td>Spencer's Retail Limited</td>
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<tr>
<td>Dilsukhnagar</td>
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<tr>
<td>Musheerabad (Spensor's Hyper Market)</td>
<td>Great Whole Sale Club Ltd</td>
</tr>
<tr>
<td>Location</td>
<td>Address</td>
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<tr>
<td>Tarnaka</td>
<td>Maspac House, Door No.12-13-12, Tarnaka Main Road, Hyderabad-500017</td>
</tr>
<tr>
<td>Old Bowenpally</td>
<td>Tanveer Residency, Babuji Nagar, Behind Ashoka Garden, Phone:+91 40-27954560, Mobile:+91 9908198885</td>
</tr>
<tr>
<td>Sainikpuri</td>
<td>Spencers Retail Ltd, 58/1 Hmt Bearing Colony, Hyderabad-500094, Phone:+91 40-27111369, Mobile:+91 9908298885</td>
</tr>
<tr>
<td>Alwal</td>
<td>Spencers Retail Ltd, H.No.1-11-101/4, Ground Floor, Alwal Main Road, Beside Syndicate Bank, Phone:+91 40-27973585, Mobile:+91 9989061137</td>
</tr>
<tr>
<td>Jupiter Colony</td>
<td>Spencer's Retail Limited, Jupiter Co-Operative Housing Society, Sikh Road</td>
</tr>
<tr>
<td>Location</td>
<td>Address Details</td>
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<tr>
<td>West Maredpally</td>
<td>Spencer's Retail Td&lt;br&gt;Rohini Arcade&lt;br&gt;Plot No-2&lt;br&gt;Lakshminagar&lt;br&gt;Willingston Road&lt;br&gt;Picket&lt;br&gt;Hyderabad-500009&lt;br&gt;Phone:+91 40-27807971&lt;br&gt;Mobile:+91 9959698884</td>
</tr>
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<td>Defence Colony</td>
<td>Great Wholesale Club Limited&lt;br&gt;Satya Arcade&lt;br&gt;H.No.37-10/6/1&lt;br&gt;Plot No.46&lt;br&gt;Survey No.218/1&lt;br&gt;Nirmal Nagar X Road&lt;br&gt;Defence Colony&lt;br&gt;Secunderabad&lt;br&gt;R.R.Dist&lt;br&gt;Phone:+91 40-27110214&lt;br&gt;Mobile:+91 9908366686</td>
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