



INGES

# **Retailing in France – Market Summary & Forecasts**

## Consumer and retailer trends, issues and market dynamics

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## Summary

“The Future of Retailing in South Korea to 2018” published by Conlumino, provides a detailed analysis of both the historic and forecast market data of retail sales of different product segments across key channels in South Korea. In addition, it provides an overview of changing consumer and retail trends, the influence of various economic variables on the retail industry, innovations in retail, and an analysis of vital developments in major retail channels.

It provides detailed quantitative analysis of past and future trends, crucially providing retail sales data not just by channel and by product, but showing product sales through different channels. This allows marketers interested in retailing to determine how to account for the development of retail trade overall and to know which channels are showing growth for which products in the coming years.

Data sets are provided for 2008 through to 2018, with actuals being provided for 2013. All initial market sizing and analysis is conducted in local currency in order to ensure local trends are reflected in the data before conversion into other currencies.

## Key Findings

- South Korea had the slowest pace of economic growth in the post-recession period, which had a significant impact on the retail industry
- Price conscious consumers seek better value for money
- Chinese visitors surpass other international tourists, boosting retail sales in South Korea
- The online channel is forecast to register double digit growth over the next five years
- Music, video and entertainment software will be the fastest-growing category group, followed by apparel, accessories, luggage and leather goods

## Reasons to Buy

- The report provides a comprehensive overview of the South Korean retail market for companies already operating in, and those wishing to enter South Korea
- Understand which channels and products will be the major winners and losers over the coming years and plan accordingly, with comprehensive coverage of 26 products, across 12 product sectors that include: Clothing, Footwear, Books, News and Stationery, Electrical and Electronics, Food and Grocery, Personal Care, Furniture and Floor Coverings, Home and Garden Products, Music, Video and Entertainment Software, Sports and Leisure Equipment, and Luggage and Leather Goods
- Detailed channel coverage is provided, covering 26 products, across four channel groups that include: General Retailers, Specialist Retailers, Value Retailers, and Online Retailers
- Benefit from a detailed analysis of vital economic and population trends, and key consumer and technology trends influencing the retail market to underpin your planning
- Monitor the competitive landscape with analysis of the key trends that are shaping the competitive landscape of major retail channels

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# 1. Market Context

## 1.1 The South Korean Retail Scenario

The South Korean retail industry is one of the largest markets among the Asian countries. Larger format modern retail businesses such as hypermarkets, grocery supermarkets, convenience stores, and online retailing has rapidly grown over the years compared to traditional retail outlets comprising street markets and family-operated small retailers.

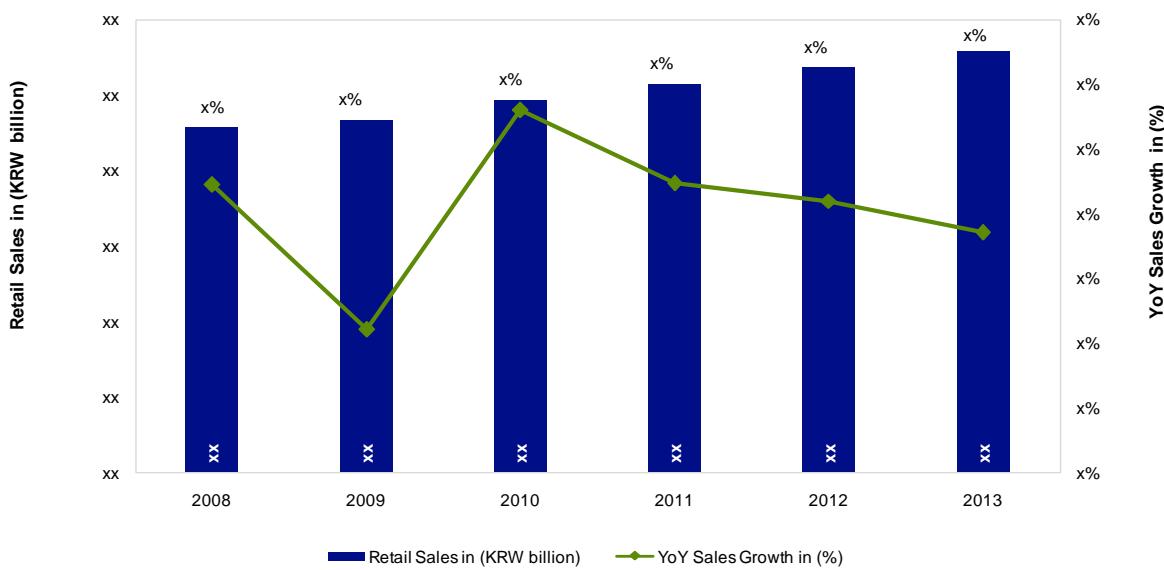
Traditionally, the South Korean retail market has been heavily concentrated by department stores. Retailers such as Lotte and Shinsegae, which are very advanced in their development strategies, have slightly slowed down the growth of many retailers. However, the introduction of a number of shopping malls with elegant restaurants, trend-setting brands, cutting-edge multiplex movie theaters and high end supermarkets led to a change in consumer life style and this change is leading to a more advanced retail experience in South Korea.

The online channel will remain the fastest-growing retail chain in the country for years to come as more and more consumers are becoming attracted to online shopping. South Korea has the right socio-economic environment mix, in particular high population density and high affinity towards new information technology that supports strong growth of online retail business.

More than half of South Korea's gross domestic product (GDP) is export driven. The slow recovery of the US economy and the Eurozone debt crisis put additional pressure on the country's economic and GDP growth. The South Korean economy, which is largely trade-dependent, remains affected by the global economic weakness and a modest slowdown in China, which is its leading export market. Notably, the economic slowdown took a larger toll on traditional retailers, while it served as an opportunity for modern format, large-scale retail operators to further expand their market shares. With the global economic situation having an adverse effect on the economy, consumers are becoming cautious while shopping and are looking out for better deals and offers from retailers. The government has taken steps to increase consumer spending, one of which involves reducing the policy interest rates and providing stimulus in the form of financial packages to rejuvenate the country's economy.

However, as export growth and the economy picks up, the retail sector is expected to grow at a steady pace and total retail sales are forecast to reach KRWxx billion by 2018, growing at a CAGR of x% during the forecast period aided by low inflation and interest rates. Over x% of the South Korean population is urban and, compared to most of their Asian neighbors, the country has a relatively wealthier population, which makes it an attractive retail market for both domestic and foreign companies.

**Figure 1: Retail Sales and Y-O-Y Growth Rate (KRW billion, %), 2008–2013**



Source: Conlumino

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## 2. Retail Trends and Innovations

### 2.1 Retailer Innovations

#### 2.1.1 E-mart's flying store is designed to make shopping even more easier

South Korean discount chain E-mart has come up with a new concept in order to make shopping easier for Korean consumers with the creation of the flying store. The flying store has been designed with brightly colored balloons in the shape of the E-Mart truck with Wi-Fi routers inside them, placed in different parts of the city. The floating balloons have built in Wi-Fi and, once connected, consumers will be able to download coupons from the app and apply them when making a purchase using the E-mart mobile app. Korean consumers work long hours and are always busy, meaning accessibility is one of the main factors that they consider when making purchases. The idea behind the creation of the flying store is to enable these busy customers who are not close to an E-mart store to do their shopping from E-mart.

During the month of promotion, downloads of E-mart's app rose to xx while its mobile sales more than doubled. Additionally, the coupons downloaded from the balloons drove a sales increase of x% in the physical E-mart stores.

**Figure 2: E-Mart's Flying Store floats around malls**



Source: Company Website

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### 3. Category Group Analysis: Apparel, Accessories, Luggage and Leather Goods

This chapter considers the South Korean apparel, accessories, luggage and leather goods category group. Data is presented by breaking down the group by the categories it is made of, and the channels the category group is sold through.

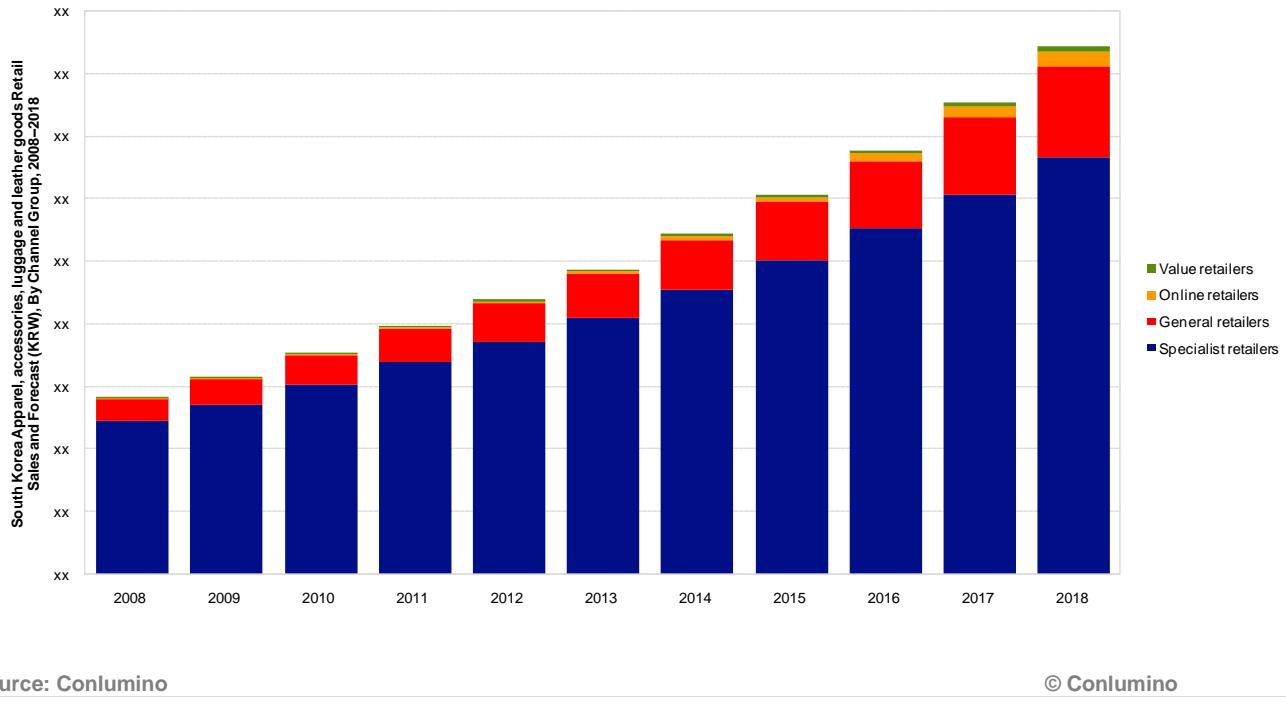
#### 3.1 Apparel, Accessories, Luggage and Leather Goods Category Overview

##### 3.1.1 Apparel, Accessories, Luggage and Leather Goods by Channel

The apparel, accessories, luggage and leather goods product category, contributed x% towards total retail sales, in 2013, registering retail sales of KRWxx billion. The category group is expected to grow at a pace of x% during the forecast period, and register retail sales of KRWxx billion in 2018.

General retailers formed the dominant sales channel, with retail revenues of KRWxx billion selling x% of the product category in 2013.

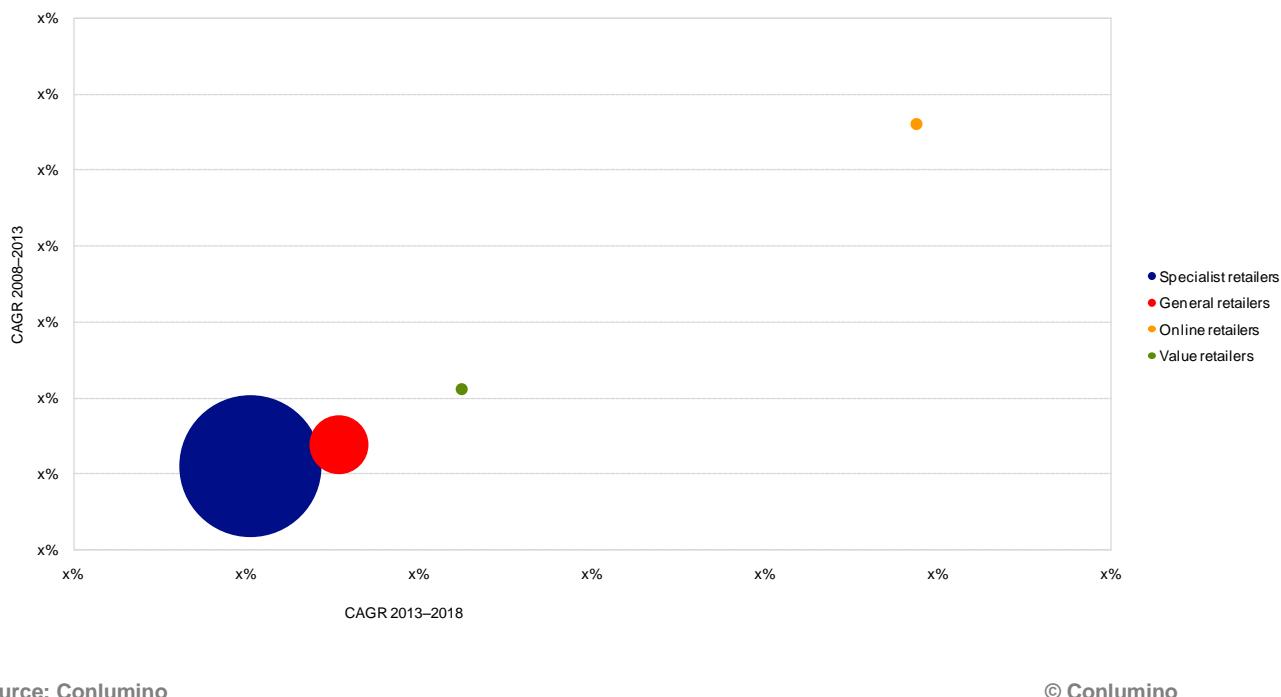
**Figure 3: South Korea Apparel, Accessories, Luggage and Leather Goods Retail Sales and Forecast (KRW bn), by Channel Group, 2008–2018**



Source: Conlumino

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**Figure 4: South Korea Apparel, Accessories, Luggage and Leather Goods Retail Market Dynamics, by Channel Group, 2008–2018**



Source: Conlumino

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**Table 1: South Korea Apparel, Accessories, Luggage and Leather Goods Retail Sales (KRW bn), by Category 2008–2013**

Channel group	2008	2009	2010	2011	2012	2013	CAGR (%) 2008 – 2013
General retailers							
Specialist retailers							
Online							
Value retailers							
<b>Overall</b>							

Source: Conlumino

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**Table 2: South Korea Apparel, Accessories, Luggage and Leather Goods Retail Sales Forecast (KRW bn), by Category 2013–2018**

Channel group	2013	2014	2015	2016	2017	2018	CAGR (%) 2013 – 2018
General retailers							
Specialist retailers							
Online							
Value retailers							
<b>Overall</b>							
Source: Conlumino							© Conlumino

**Table 3: South Korea Apparel, Accessories, Luggage and Leather Goods Retail Sales (USD bn), by Category 2008–2013**

Channel group	2008	2013	2018
General retailers			
Specialist retailers			
Online			
Value retailers			
<b>Overall</b>			
Source: Conlumino			© Conlumino

# Summary Methodology

## Overview

All data in this series of retail reports from Conlumino is rigorously sourced using a comprehensive, standardized methodology. This methodology ensures that all data is thoroughly researched and cross-checked against a number of sources and validation processes. At the core of this methodology is a triangulated market sizing approach, which ensures that results from different sources and approaches, including Conlumino's own industry surveys, are compared and a final consensus number between these inputs is derived. In addition, standardized processes and quality controls across the entire data collection, analysis and publication process ensure compliance and cross-checking of the data occurs at each stage of the methodology.

### The triangulated market sizing method

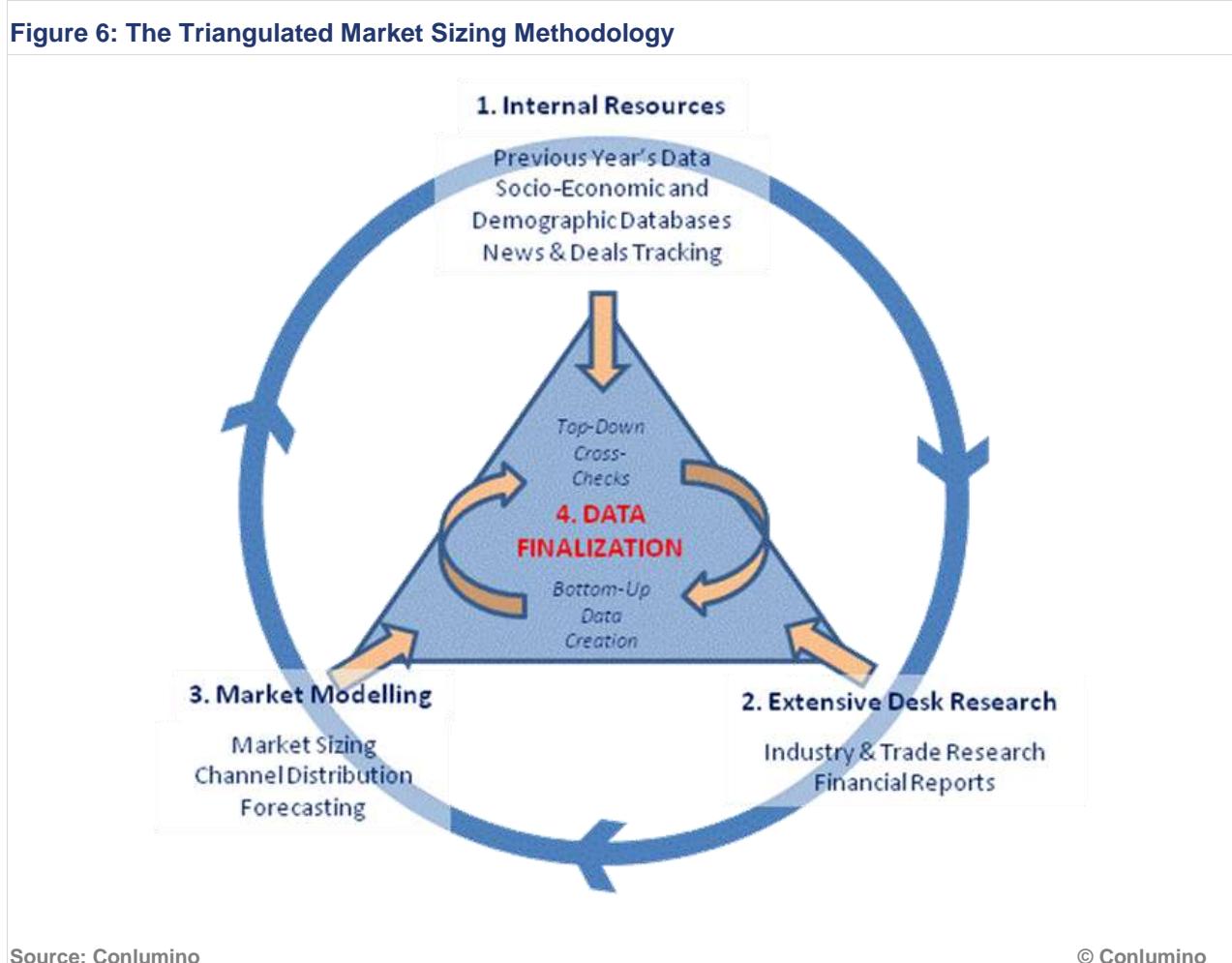
The triangulation method ensures that the results from three distinct phases of the research are brought together and cross-compared before finalized market numbers are derived:

1. **Existing internal resources:** as retail data is compiled using a rolling annual program of industry research, the first stage of producing the data is to review the existing internal information, both from the last major data release, as well as that which has been collected on an ongoing basis throughout the year. This includes inputs about market as well as individual retailer performance. These sources are then reviewed and incorporated into data collection processes and databases before the second intensive phase of desk research.
2. **Extensive desk research:** this phase of the methodology incorporates the main phase of secondary research. This research is initially conducted across a wealth of information sources, as listed below. In addition, the results of any relevant surveys from other Conlumino projects are also fed into data collection sheets. Online industry surveys can include industry opinion surveys of retailers' — and their suppliers' — sentiment and consumer surveys of purchasing and retail behavior. Secondary sources include, but are not limited to, the following:
  - a. Industry surveys
  - b. Industry and trade association research
  - c. Trade portals
  - d. Company filings and analyst presentations
  - e. Broker and investment analyst reports
  - f. International organizations
  - g. Government statistics
  - h. Retail media
  - i. National Press, including both business and consumer titles
3. **Market modeling:** the next stage in the process is to feed the results of the above into market models, which also include drive-based forecasting tools — which analyze drivers such as disposable income, product uptake, macro-economic drivers and market momentum — in order to fill in any gaps in the data and update forecast numbers. At this stage, the market models also look to update channel distribution data sets. For example, information

found at the research and trend monitoring stage on online retail sales would directly affect the channel distribution models.

4. **Data finalization:** the final stage of the process is the true triangulation of all the previous inputs. At this stage data is created using the inputs to hand in a bottom-up fashion, starting with the inputs from each of the previous three stages of the process for each data point to be published. This is done for all the product, channel and country combinations covered in the data. At this stage, therefore, the project analysts are constantly evaluating and deciding upon the relative merits of each of the inputs from the research processes. Once a triangulated set of data has been finalized, these outputs are then thoroughly cross-checked using a series of top-down checks which review the data against a series of reference benchmarking, including known overall retail sizes, growth trends and per-capita spending rates.

**Figure 6: The Triangulated Market Sizing Methodology**



Source: Conlumino

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## Industry surveys in the creation of retail market data

Stage 2 of the above process includes using the outputs of Conlumino's surveys of consumers' packaged goods consumption and industry opinion. Every year Conlumino completes a large scale survey, with over 120,000 responses, covering CPG purchasing and consumption habits in 10 core retail markets around the globe. This major study, cross-referenced against the primary telephone research of product market sizes by country, provides outputs against which relevant retail market data, focusing on the grocery channel and core products in this channel are assessed. It should be noted that overall, this feeds research into 3 of the 25 product categories covered. In addition, any other suitable surveys conducted by Conlumino which also provide information on retail markets are mined for information to be put into the data finalization process.

## Quality control and standardized processes

Crucial to the function of the above method is the adoption of strict definitions for all products and channels, and adherence to a standardized process at each and every stage in the methodology. By following this approach all data is made cross-comparable across countries to ensure that analysis adds to the understanding of market dynamics and trends.

The key elements of this approach are:

- **Strict channel definitions:** the definition of each channel is the same in every country;
- **Strict product definitions:** the definition of each product is the same in every country;
- **Standardized processes:**
  - **Data capture** – all data received as part of the research is captured in standardized files and in a standard format. Any workings that analysts carry out on inputs, for example to correct for misalignment in category coverage, are also covered in these sheets
  - **Data creation** – all modeling and forecasting approaches are standardized in order to ensure consistency
  - **Finalization and verification** – systematic methods and approaches are used to finalize data points
- **Country by country research structure:** all research is conducted country by country in order to ensure that market data reflect local market trends and contexts
- **Data checks during “bottom-up” creation:** during the data creation and finalization stage analysts refer back to initial sources and inputs in order to ensure accuracy in the data
- **Top down data audits and cross-checks:** a large series of cross-checks across all the different dimensions of the final data sets are run in order to identify any outliers or trends that do not fit with Conlumino's market understanding, as well as to conduct specific analyses against set proofing criteria, such as abnormal growth rate changes, verifying data at both the overall and detailed level against research inputs and checking per capita spends against other analysis of consumers' spending in a country
- **Hierarchical review processes:** finally, all of the above processes are subject to a hierarchical review process which ensures that not only the core analysts within a team look at the data, but that at each stage data is passed through several management layers in order that queries and data review and sign-off are completed before any final data can be published

## Related Reports

Retailing in Turkey – Market Summary & Forecasts

Retailing in Germany – Market Summary & Forecasts

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The Future of Retailing in Mexico to 2018

The Future of Retailing in South Africa to 2018

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## About Conlumino

Conlumino Global Retail offers a comprehensive 360° view of the retail landscape. A team of analysts, with more than 200 years of combined experience, help you identify and understand the most current retail trends.

Last year hundreds of retail businesses across the globe used our research to make critical business decisions.

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