



**Volume XXV Issue 8  
AUGUST 2010**

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**Publication Office**

N-49, Greater Kailash-I,

New Delhi - 110 048

**Subscription**

**Inland**

|                     |       |
|---------------------|-------|
| 3 Years (36 Issues) | ₹1620 |
| 2 Years (24 Issues) | ₹1080 |
| 1 Year (12 Issues)  | ₹540  |

**Overseas**

|                     |         |
|---------------------|---------|
| 3 Years (36 Issues) | USD 405 |
| 2 Years (24 Issues) | USD 270 |
| 1 Year (12 Issues)  | USD 135 |

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Edited, Published & Printed by Anju Arora on behalf of ADI Media Pvt. Ltd. N-49, Greater Kailash-I, New Delhi-110 048. Printed at Tara Art Printers Pvt. Ltd. B-4, Hans Bhawan, B.S.Z. Marg, New Delhi-110002.

## July Market Trends

Sales of LCD TVs are estimated at 220,000 units in July 2010, which is a 44 percent growth over estimated sales of 152,000 units in July 2009. While this growth is impressive, it is still well short of the industry expectation of 100 percent growth. Manufacturers have built substantial capacity for LCD TVs and the months ahead are likely to see lower prices as manufacturers target larger volumes in the build up to Diwali and the festival season.

A quick review of conventional cathode ray tube CTV sales in July 2010 versus July 2009 shows that sales of 14-inches CTVs have increased marginally and 14-inch slim CTVs are seeing an increase in market share. Similarly, 15-inch slim CTVs are also doing better than last year, helped by a price reduction of ₹200 from the picture tube maker Samtel a couple of months ago.

The sales volume of 20-inch and 21-inch flat televisions in July 2010 has decreased by 18 percent from July 2009. The demand has shifted to 21-inch slim, which has seen a volume increase of 82 percent over the same period. The 29-inch (flat and slim) CTV category has seen sales volumes in July 2010 decline by 44 percent from July 2009, and clearly consumer preference has shifted dramatically to LCD in this size. Samtel has discontinued production of their line of 29-inch color picture tubes as a result of this market trend.

Onam is on August 23, 2010 and this harvest festival period of around 10 days is normally associated with a sales surge in the state of Kerala for a few days before and after the main festival date. Bonus is distributed at this time of the year in Kerala and brands are aggressive with local promotions.

Modern retail is looking to become aggressive on pricing with laptops at ₹15,000 and microwave ovens at ₹2,000 and needs this type of aggressive approach if it is to surge ahead. We can expect more stores to open as modern retail increases its reach. Government policy on foreign direct investment (FDI) in retail appears to be leaning toward allowing FDI in consumer electronics to start with.