India Exercise Notebook Market Forecasts to 2020 - Influx of Organized Notebook Brands and Rising Spending on Education to Fuel Growth

Description: The report titled "India Exercise Notebook Market Forecasts to 2020 - Influx of Organized Notebook Brands and Rising Spending on Education to Fuel Growth" which provides a comprehensive analysis of the exercise notebook market in India. The report covers various aspects such as overall size of India exercise notebook market, segmentation on the basis of Use, Number of Pages, GSM, Recycled/Non-Recycled Papers, Retail/Institutional Sales, Size, Bindings, Cover Types, City Tiers, Rural/Urban Demand and Paper Types.

The report also covers the investment model, pricing analysis and trade scenario in the industry. Additionally, the report offers prevalent trends, developments, challenges in the industry besides presenting a PORTERS analysis of the current market. The report also covers the competitive landscape of the industry, market share of major players, and comprehensive profile of leading players operating in the market. Major macroeconomic indicators affecting the market have also been highlighted in the report. The report is useful for existing exercise notebook manufacturers, dealers, distributors, online and offline retailers, book shops, emerging players who wish to capitalize the market potential and investors who are looking forward to venture into the exercise notebook market in India.

Market Genesis

The market for exercise notebooks in India has been traditionally dominated by the unorganized segment. From the endpoint of marginal retailers to independent sellers, all have been dependent on imports from China. However, the market has developed to achieve a substantial valuation which was not there until 2000. The evolvement of organized brands such as ITC Classmate, Navneet and others have added premium to the market, discerned by the fact that the prices of exercise notebooks have grown 5-6 folds and even more than that in some cases in the last decade. The exercise notebook market in India has been expanding at a decent pace in the wake of growing economy, high literacy levels, burgeoning middle-class and enhanced scale of initiatives in the education sector. There has been a marked shift in the preference from cheap local brands to quality products. Aesthetically and functionally improved notebooks, which come with innovative 3D covers, had witnessed increasing demand in the recent years. The market size in terms of consumer expenditure on exercise notebook was evaluated at INR ~ billion during FY'2015 with the organized segment contributing for ~% of the market revenue. Volume-wise the market sold ~ billion units of exercise notebooks in FY'2015 at an aggregate average price of INR ~.

Trade Scenario

The import market for exercise notebook in India has grown at a decent rate over the period FY'2010-2015. In fact, there was a steep rise of ~% during the period FY'2015 which saw the import value reach INR ~ million. China and USA have been the major importing locations. The export market for exercise notebooks in India was pegged at INR ~ billion in FY'2015 showcasing an exemplary CAGR of ~% over the period FY'2010-2015. Besides, a healthy domestic market, the export demand has been quite promising which has resulted in a large number of local and national players aligning their businesses to suit the foreign demand.

Major Segments

By type of usage, notebooks (including long books) accounted for the highest revenue and volume sales amongst all the product types envisaging ~% of the market sales volume in FY'2015. While ~% of the sales came from the 54-56 gsm categories, 65 gsm variants accounted for ~% of the sales. Practical notebooks and drawing books were the next highest selling items envisaging volume share of ~% and ~% respectively in FY'2015.

Graph book and scrap book sales are heavily constrained by their usability in stipulated subjects and therefore have limited scope of expansion in the overall exercise notebook market. A5 accounted for ~% of the overall notebooks sold amounting to ~ million units while A4 had countered a share of ~% in FY'2015. 41-100 page notebooks accounted for ~% of the overall sales volume in the notebook and long book category during FY'2015. 60 page notebooks are one of the most popular items being consumed in the Indian market under this category. 101-150 page notebooks envisaged a share of ~% in FY'2015. Prices for this category fall
in the range of INR ~. As far as practical notebooks are concerned, 80-100 page notebooks accounted for ~% of the sales whereas ~% of the sales for the drawing books came from 20-50 page categories.

Graph book sales also followed similar trend with ~% of the sales volume being contributed from the 20-50 pages category. The usage of recycled paper is more prevalent in India currently accounting for around ~% of the overall paper required in manufacturing exercise notebooks. The primary reason behind this has been low cost of production and heightened governmental push towards integrating pro-environment manufacturing processes.

High usage of writing exercise notebooks as compared to drawing notebooks indirectly leads to greater demand of white paper exercise notebooks which accounted for ~% of the overall volume sales in the market in FY'2015. Revenue generated through exercise notebook sales in tier-III cities amounted to INR ~ billion while tier-II cities contributed for INR ~ billion in FY'2015.

Competition

As far as the competitive landscape is concerned, ITC, with its collaborative links with SMEs coupled with a strong product portfolio is currently the unanimous leader in the market. It has been successful in creating a strong brand with its “Classmate” range of exercise notebooks which was one of the first notebooks to feature a premium design, had superior quality papers and was reasonably priced. ITC had a ~% market share in FY'2015 followed by Navneet that churned out a ~% share in the organized manufacturer's revenues from exercise notebooks in India. Navneet is one of the oldest stationery brands and has got a widely popular publishing business. Brijlaxmi Paper had the third highest share of ~% owing to its phenomenal growth in FY'2015 because of its heavily expanding retail network including modern trade channels.

India's middle class population is likely to go up to 583 million by FY'2025 resulting in wider demand. The market is expected to witness a rise in the volume of premium office as well as school and college notebooks as companies widen the offering of their premium brands to realize the high margin in this segment. Pro-environmental initiatives by the Government will propel the usage of more recycled papers in exercise notebook production. The market is also tempting for foreign brands that will look forward to grab a share of the unorganized pie. It is projected that the market will reach volume sales of ~ billion envisage revenues worth INR ~ billion by FY'2020. The average exercise notebook price would reach INR ~ by the same period.

Key Topics Covered in the Report:

- The Market Size of India Exercise Notebook Market.
- Growth Drivers, Trends and Challenges in India Exercise Notebook Market
- Major Paper Manufacturing Clusters in India
- Pricing Analysis in India Exercise Notebook Market
- India Exercise Notebook Market Segmentation by Use (Notebooks, Long books, Practical books, Drawing books, Graph books, Scrap books, Pocket/Reminder books), Number of Pages, GSM , Recycled/Non-Recycled, Retail/Institutional Sales, Size (A5, A4, B5, A6, B6, and Others), Notebook Bindings (Stapled, Threaded, Spiral and Others), Cover Types (Flexible and Hard), City Tiers (I, II and III), Rural/Urban Demand, Paper Types (White, Rough and Drawing)
- Snapshot of Premium Notebook Market
- Value Chain of India Exercise Notebook Market
- PORTER's 5 Forces analysis in India Exercise Notebook Market
- Investment Model in India Exercise Notebook Market
- Government Regulation in India Exercise Notebook Market
- Trade Scenario of India Exercise Notebook Market
- Market Share of Major Players in the India Exercise Notebook Market
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