

# Competition and Marketing Challenges in the USA Market for Indian Granite Exporters

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## Abstract

**Purpose:** The purpose of this paper was to study competition and marketing challenges that granite exporters from India faced in the USA market for apprehending both the domestic and the export markets.

**Design:** This paper is descriptive in nature, and it applied snowball sampling method to report a survey of 82 completed responses about the marketing challenges faced by Indian granite traders for the domestic market and the USA market. It used published data of granite businesses since the year 2004 to study trends for understanding competition.

**Findings:** The paper contemplated that with growing demand of granite both for the domestic market and the international market, especially the USA, India needs a paradigm shift in marketing strategy for granite. Key challenges were identified for driving success both in the domestic market and the USA market.

**Practical Implications:** The paper provided an insight about the dynamics at domestic as well as inter-country level for comparing competitive standing alongside the review of literature. It highlighted key challenges in the domestic market and in the USA market for use by policy makers, exporters, and academicians.

**Originality/Value:** The paper incorporated competition and marketing challenges of the granite business for generating ideas that could be used as basis for a policy action plan.

**Keywords:** global competition, marketing challenges, export, granite, international trade, market

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Mineral resources are essential to society. India faces challenges in meeting its current and future minerals needs. These challenges range in scale from global competition for resources to local decision making about the appropriate use of mines. Due to such challenges, the nation needs to balance reliability and availability of mineral supplies with other considerations, including the availability of other natural resources; the viability of energy and mineral development amidst changes in climate, natural hazards, and demand; and the need to prevent or mitigate environmental degradation. To provide society with the knowledge needed to address such challenges, there is growing recognition that it is incumbent on scientific research to assemble data that are usable in policy analysis and decision making, and ultimately transmit their findings more clearly to policymakers and the public (Gandhi, 1999).

Decisions on every scale affect the availability of minerals and have far-reaching economic, geopolitical, and

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social consequences. This study pertains to understanding competition and challenges in the USA market for granite exports from India, which is one among the leading countries in mining and export of granite, and is rich in granite reserves. Although granite is a minor mineral, it is a major contributor in foreign exchange earnings. India is the second largest exporter of raw granite after China and ahead of Brazil and South Africa (IMYB, 2012). Geologically, the Southern and Eastern belts of the nation are abundant in granite deposits. Different shades of granite are available in abundance in Tamil Nadu, Andhra Pradesh, Karnataka, Maharashtra, Assam, Bihar, Rajasthan, Odisha, Meghalaya, and Madhya Pradesh. Granite from India has become the most sought-after and extensively used stone material in building construction and massive structural works throughout the world, and it is well-known in the international market, not only for its elegance and aesthetic quality, but also for its durability.

Understanding of competition and marketing challenges in the USA market for granite exports from India intends to reveal the roots of prosperity (see, e.g., Mellahi, Demirbag, & Riddle, 2011). Apart from portraying competition quantitatively, this paper attempts to describe challenges in the domestic market for procurement of granite raw with respect to government policies, and challenges in the global market for granite exporters while highlighting challenges in the USA market for export of granite from India.

## **Review of Literature**

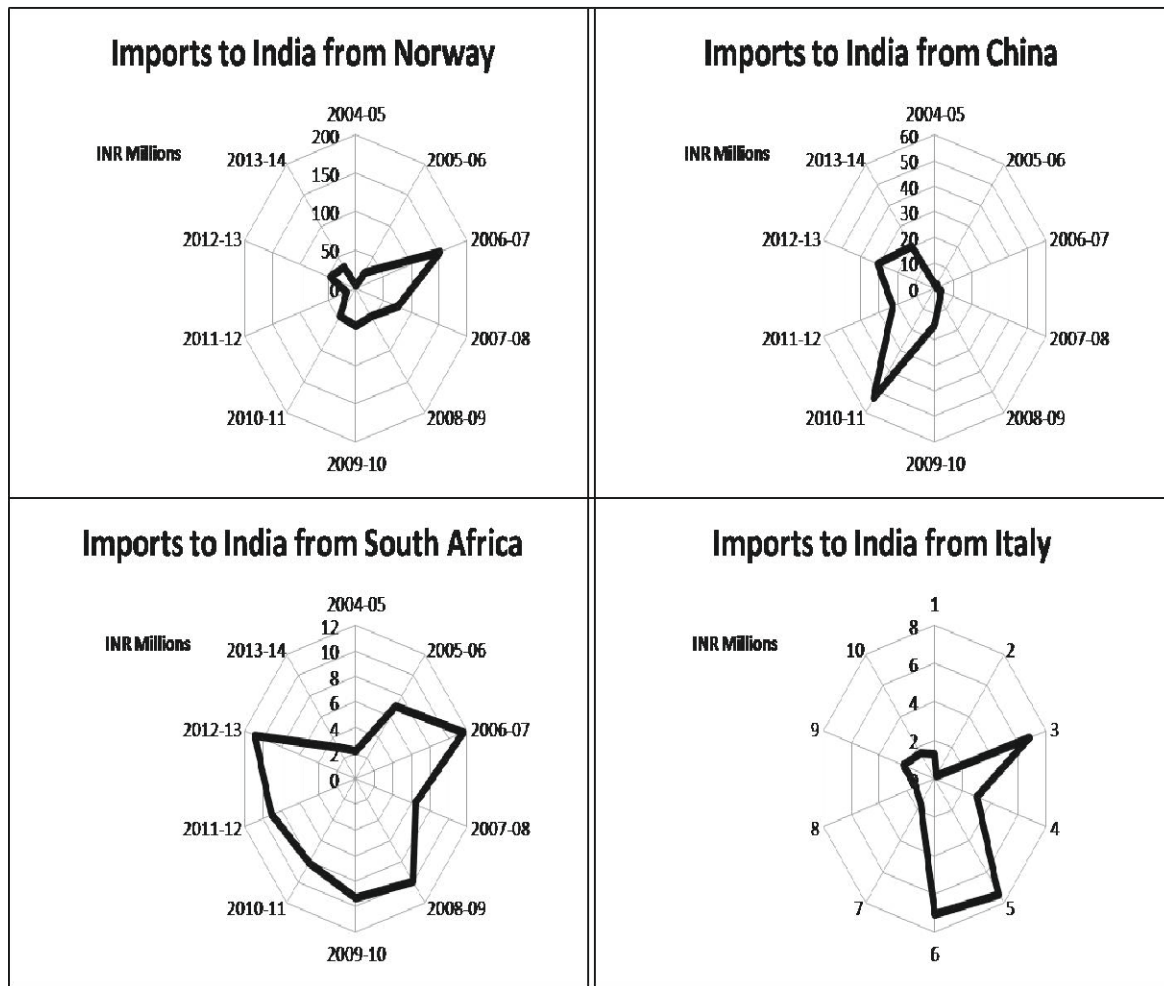
India is one of the largest exporters of granite to the rest of the world to countries like the United States of America, Mexico, Canada, Australia, Japan, Belgium, China, Spain, Italy, and many others (Mishra & Walvekar, 2015). India has one of the finest and the most easily available quarries of granite stone deposits from where huge amounts of affordably priced granite can be made available to the world. Due to the ancient history of the availability of the stone and its huge popularity all around the globe, granite exporters from India make it a point that they keep up to the name the ancestors have created. With the development of technology, granite manufacturers in India have seen a remarkable development in exports in terms of finish and elegance.

Granite has been used for centuries as a construction stone because of its properties. Menkaure's Pyramid in Egypt was built of limestone and granite blocks (Edwards, 2003). The third largest Egyptian pyramid was named The Red Pyramid of Egypt based on the granite color on the surface (Spence, 2000). Many Hindu temples are also made of granite in Southern India (Krishna, 2014). Nowadays, granite is extensively used as a dimension stone and as flooring tiles both in public and commercial buildings and monuments. Increasing amount of acid rain in different parts of the world has been the reason why granite has begun to substitute marble as monument material, since it is more durable (Abbasi, Poornima, Kannadasan, & Abbasi, 2013). Polished granite is also nowadays a widely used choice for kitchen countertops due to its high durability.

India has been able to maintain its democracy after independence, which is exceptional compared to other colonies (Mitra, S. K., 2013). Developed rich countries are interested in India now (Henrikson, 2013). The term 'Make in India' can be used to describe the huge attention that India as a country and its economic growth have created in different information channels all around the world. Still, there are many challenges for granite business in India starting from cooperation with locals to finding reliable suppliers, agents, and other partners. Many times, Indian business partners start negotiating about contract terms again during the deal. Legislation in India is complex and execution is very slow.

The Mines and Minerals (Development and Regulation Act, 1957, ('MMDR')) and the Mines Act, 1952, together with the rules and regulations framed under them, constitute the basic laws governing the mining sector in India. The provisions of Mineral Concession Rules, 1960, and Mineral Conservation and Development Rules, 1988, are, however, not applicable to minor minerals like granite. The minor minerals are separately notified and come under the purview of the State governments. The State governments, for this purpose, have to formulate the

**Figure 1. Graphical Distribution of Granite Imports to India for Customers**



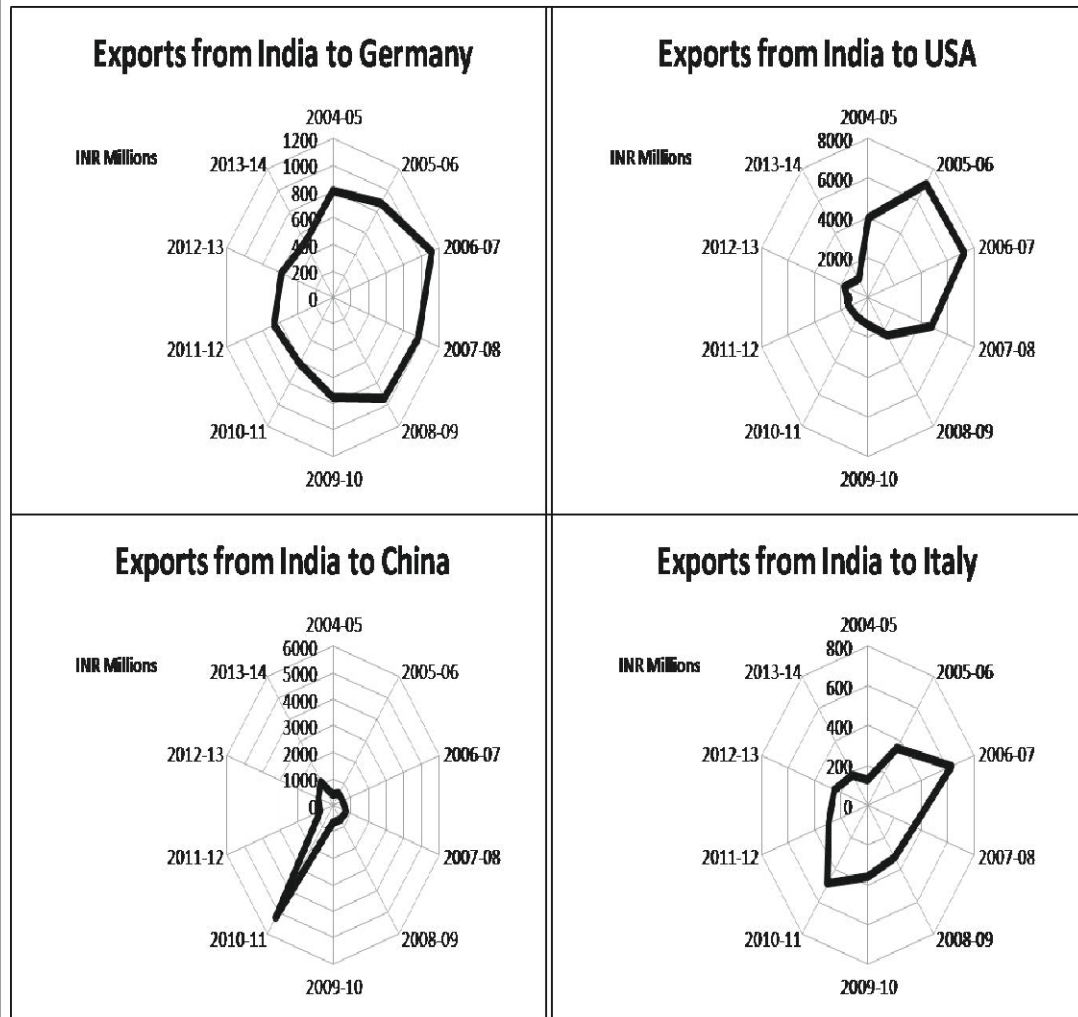
Source: Government of India, Department of Commerce (2014). Note : Value in ₹ Lakhs does not include insurance or freight

Minor Mineral Concession Rules for streamlining and simplifying the procedures for grant of mineral concessions, develop a sustainable framework for optimum utilization of the country's natural mineral resources for the industrial growth in the country, and at the same time, take steps for improving the life of people living in the mining areas, which are generally located in the backward and tribal regions of the country.

As per the Export-Import Policy for 2009-14 and the Foreign Trade Policy hereunder, the imports of granite monumental and building stone under heading No. 2516 (whether or not roughly trimmed or cut, by sawing or otherwise, into blocks or slabs of a rectangular shape) are restricted. However, similar restrictions for exporting granite are not found as India accounts for over 20% of the world resources in granite. On the other hand, worked granite blocks/tiles under sub-heading 680223 can be imported freely (see Figure 1). Accordingly, Figure 1 depicts major countries exporting worked granite blocks to India, which is reflecting consistent decline excluding China, especially for the year 2010-11, which is one of the disturbing trends witnessed in the export of Indian granite in recent years.

India has been exporting raw granite to USA, China, Germany, Saudi Arab, Nigeria, Belgium, Netherlands, UAE, UK, and Italy consistently over past 10 years or more, but there has been a gradual decline (see Figure 2).

Figure 2. Graphical Distribution of Granite Exports from India for Customers



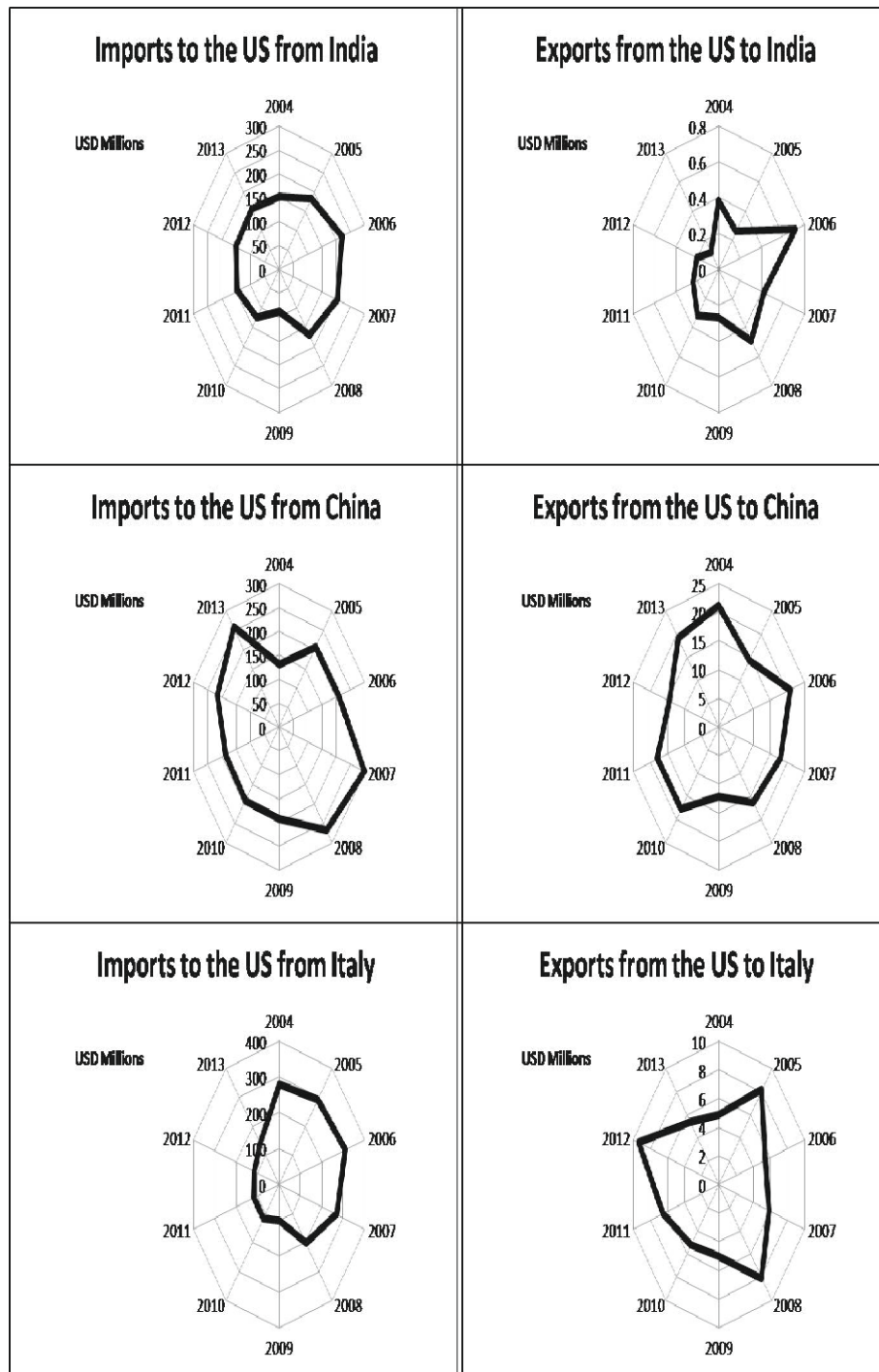
Source: Government of India, Department of Commerce (2014).

Note : Value in ₹ Lakhs does not include insurance or freight

known for marble, its superior brand image in the minor mineral segment makes up for granite as well. Italy has held its exclusive market access for granite owing to good quality with prompt delivery mechanism. China is approaching an astonishing development story, which is fast evolving within the country (LITOS Online, 2013).

Nevertheless, there is a dearth of academic research on marketing issues of the granite industry (Menezes, Brasileiro, Santana, Neves, Lira, & Ferreira, 2008 ; Menezes, de Araújo Neves, Ferreira, & de Lucena Lira, 2002 ; Menezes, Ferreira, Neves, Lira, & Ferreira, 2005). There seems to be some emphasis on academic research related to the environmental issues of waste from the granite industry (Mendoza, Oliver-Solà, Gabarrell, Rieradevall, & Josa, 2014 ; Menezes et al., 2002). Menezes et al. (2002) aimed to characterize and evaluate the possibilities of using the granite sawing wastes generated by the process industries from Paraíba State, Brazil, as alternative ceramic raw materials in the production of ceramic bricks and tiles.

**Figure 3. Graphical Distribution of Granite Import-Export Scenario from the U.S. for Customers**



Source: Stone World (2014)

Note : Value in dollars does not include insurance or freight



There is no academic study in India for granite industry, but Agarwal (1995) believed that there is a high growth potential for granite from India by improving standards for the international markets. Notably, China emerged as the major importer of Indian rough granite for re-exports to the USA, which is the major importer of Indian granite (LITOS Online, 2013).

The Figure 3 depicts the strongly growing granite market in the USA in the past years to becoming second most important consumer of granite after China, but the market of India has shrunk noticeably. This is happening when India possesses one of the best granite deposits in the world, having excellent varieties comprising of over 200 shades and India has favourable trading relations with USA as compared to China. Although, Italy is mostly As the main focus in respect of the granite business is on export selling than domestic selling, it becomes very important to create an umbrella brand for the nation (Fan, 2006, 2010 ; Fetscherin, 2010 ; Kalamova & Konrad, 2010). The umbrella brand serves the needs of the micro-brands of regions, provinces, and cities the best (Mugobo, 2014; Simonin, 2008). As granite is sold in the international market on the basis of country of origin; national branding becomes a powerful tool for identification, differentiation, and creation of trust in the minds of buyers. Since the 1980s, principal developments in strategy analysis focused on the link between the strategy and the external environments (Porter, 1991). However, now, there is a resurgence in interest in the role of resources as the foundation for strategy, which can include aspects of quality, price, varieties, timely delivery, professionalism, reputation, and so on (Barrick, Thurgood, Smith, & Courtright , 2014 ; Behera, Mohanty, & Prakash, 2015). These aspects of resources may not be all productive simultaneously subject to cooperation and coordination of teams of resources.

## Research Methodology

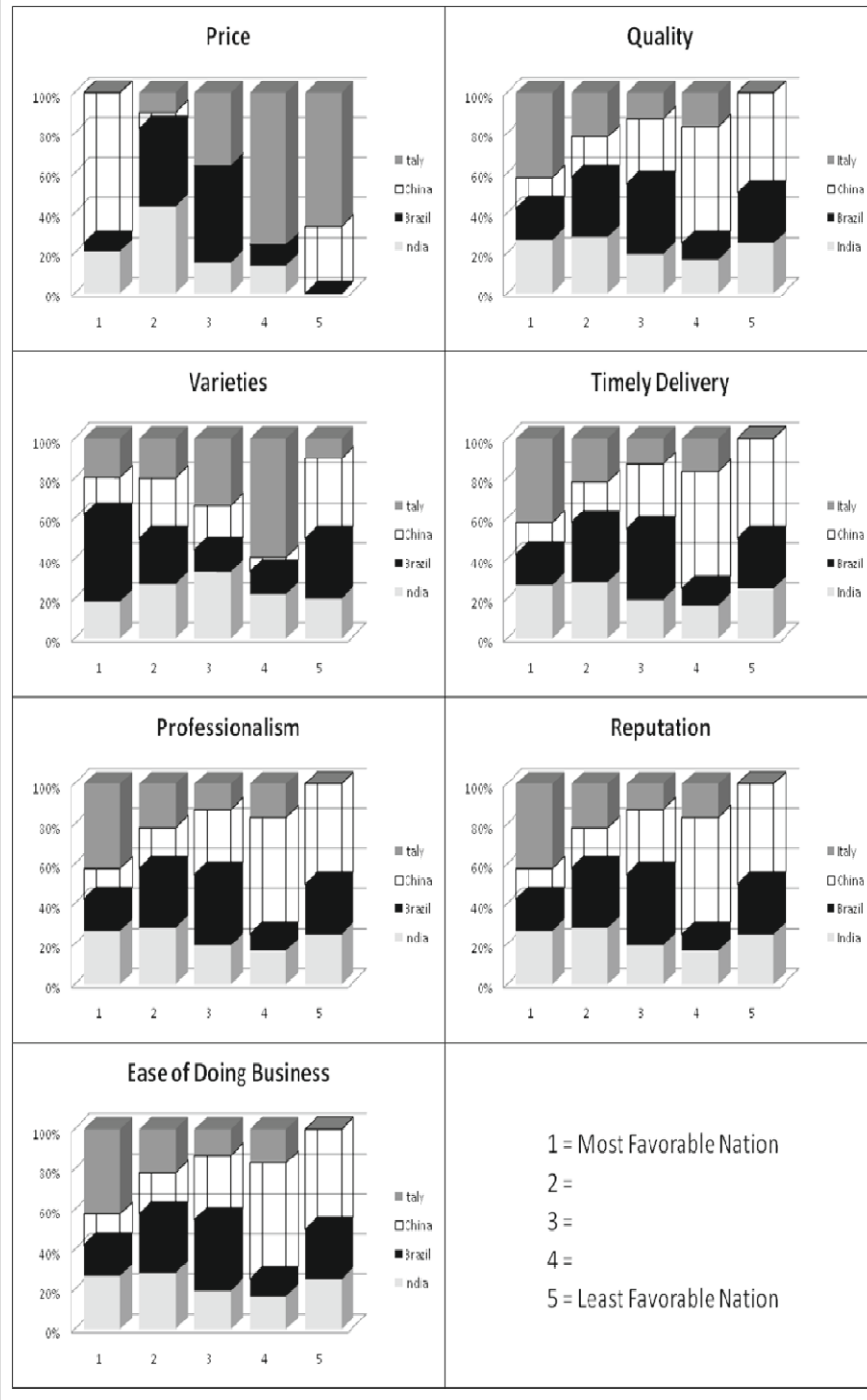
For understanding competitive standing, the study covers the time period of April 2004 to March 2014, however, for understanding challenges of granite exporters from India in the domestic market and in the USA market, the process of primary data collection got over by March 2013, which was started in April 2011. This has been followed by data analysis and reporting. Primary data were collected through structured mail questionnaire and data were verified through discussions and experts' opinions. The survey was carried out to ascertain the suitability of the respondents for the following objectives:

- (1) To study the competitive standing of granite exporters in the USA market.
- (2) To study challenges of granite exporters from India in the domestic market.
- (3) To study challenges of granite exporters from India in the USA market.

As the granite industry in India is still dominated by unorganized retailers, it is difficult to find well documented information. In order to get insights about these trends, industry interactions and discussions with traders and exporters became imperative. The first hand insights were gathered through unstructured interviews with leading exporters of granite and marble, namely, Mr. Rakesh Sharma (Executive Director, S K International), Mr. Sunil Arora (Managing Director, ARO Granite Industries Limited), Mr. Shashank Sharma (Executive Director, S K International), and Mr. J.B. Surana (President, AIGSA). These interviews gave good insights about the identified problems.

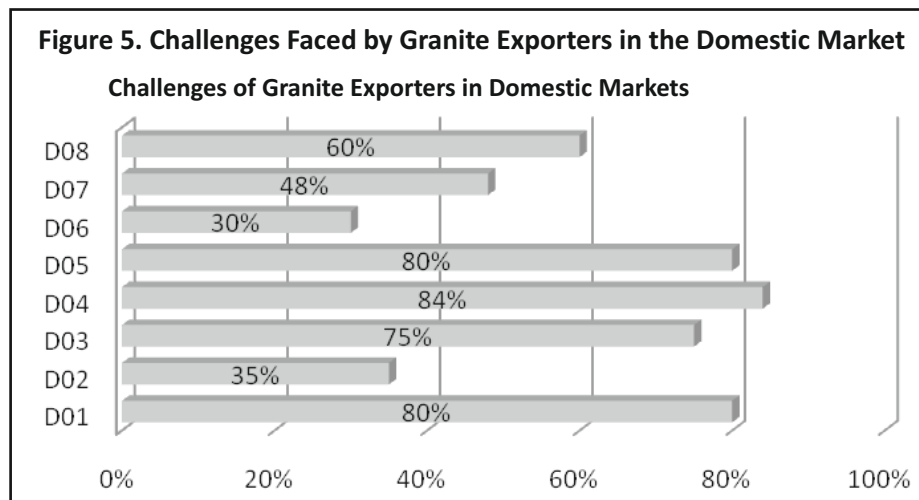
The survey involved 82 respondents of the level of Managing Director, Director, Chief Executive Officer, Corporate Head, General Manager, and Marketing Manager from 27 companies located in Hosur, Chennai, Hyderabad, Bangalore, Mumbai, and Jaipur. A total of 400 questionnaires were sent to over 200 companies involved in exporting granite. Out of 82 completed responses received, 65 were from companies selling in both domestic and export markets, whereas only 17 respondents were selling in export markets only. This study does

**Figure 4. Competitive Standing of Granite Exporters in the USA Market**



not cover sellers of granite in local markets only.

The study applied non-probability snowball sampling technique as most of the responding exporters were approached through references using some old contacts. Since this field of research is new-fangled and fresh,



there was a very good response rate, and the exporters were enthusiastic about sharing their problems and references because of the letter of recommendation from the All India Granite & Stone Association (AIGSA).

Although this study focused on learning competition and challenges in the U.S. market for granite exports from India, it can be extended to apply on the domestic market, and it can also be extended to other major granite markets of India. This study has focused on marketing issues, but it can be extended to cover mining and associated environmental issues as well. Furthermore, the study can be extended to cover opinions of importers. This study is useful for the granite industry in India for revisiting policies.

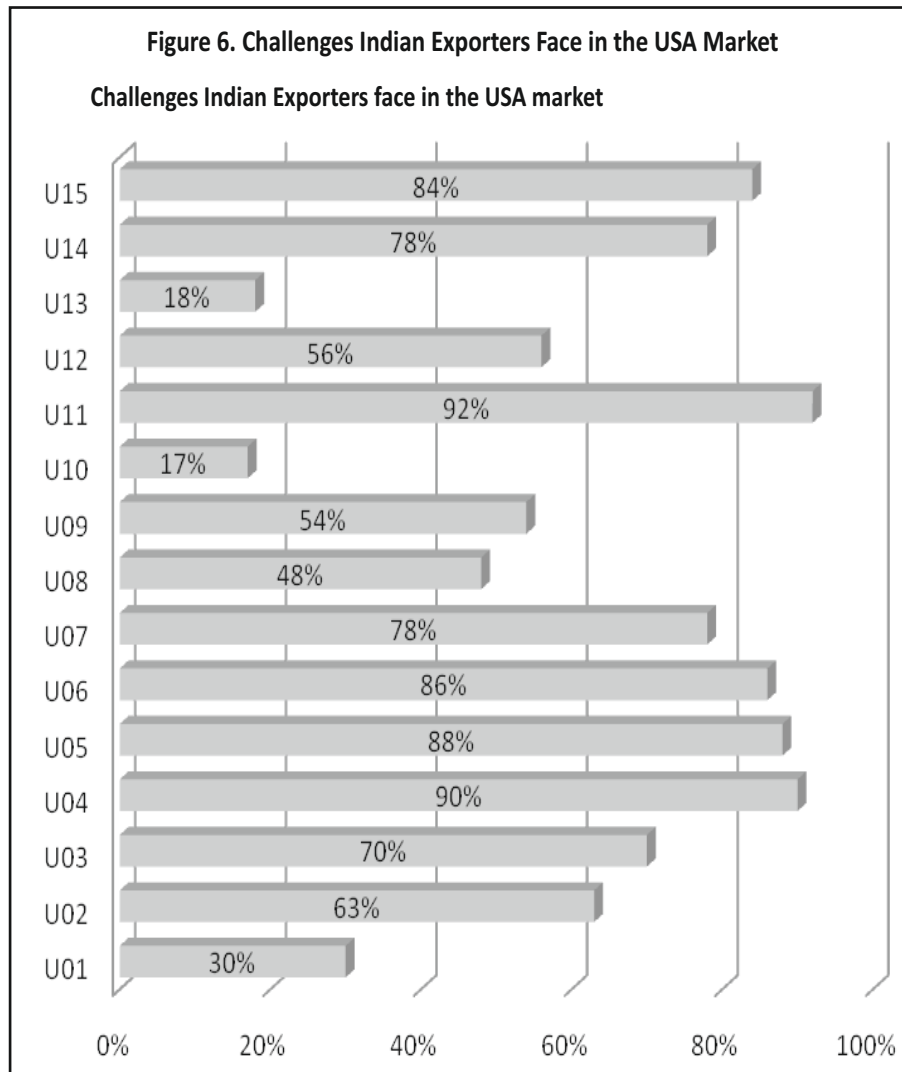
## Results and Discussion

The Figure 4 classifies respondents' in respect of favorable nation for aspects like price, quality, varieties, timely delivery, professionalism, reputation, and ease of doing business. With respect to the price aspect, China is found to be the best nation followed majorly by India (see Figure 4). However, in respect of varieties, Brazil is the best nation followed majorly by India, China, and Italy (see Figure 4). For other aspects like quality, timely delivery, professionalism, reputation, and ease of doing business, Italy is the best nation followed by India, Brazil, and China (see Figure 4). This establishes that there is a reasonably good support for Indian granite in the international market. These aspects of favorable nations describe attributes that allow a nation to outperform its competitors.

The Figure 5 depicts only strong perceptions of challenges faced by granite exporters in the domestic market. The data on these challenges were gathered using a scale such that '1' stands for *Strongly Agree*, '3' stands for *Neutral*, and finally, '5' stands for *Strongly Disagree*. However, the Figure 5 depicts the participants' responses for respective challenges in the domestic markets, where respondents opined for response as '1' or '2' only for deriving strong perceptions. The survey items for challenges faced by granite exporters in domestic markets are : (D01) lack of infrastructural facilities around mining area, (D02) difficulty in arranging finances, (D03) lack of clarity regarding quarrying rules and policies, (D04) frequent changes in policies related with quarrying, (D05) difficulty in obtaining a license for operating mines or factories, (D06) lack of logistics while exporting the goods, (D07) lack of assistance for international marketing by Export Promotion Council (EPC), and (D08) lack of assistance for market development by the government.

The three important key challenges of granite exporters in the domestic market have been found as D01 (lack of infrastructural facilities around mining area), D04 (frequent changes in policies related with quarrying), and D05 (difficulty in obtaining license for operating mines or factories).





The Figure 6 depicts only strong perceptions of challenges that Indian exporters face in the USA market. The data on these challenges were gathered using a scale such that '1' stands for *Strongly Agree*, '3' stands for *Neutral*, and finally, '5' stands for *Strongly Disagree*. However, the Figure 6 depicts responses for respective challenges in the domestic markets where respondents opined for a response as '1' or '2' only for deriving strong perceptions. The survey items for challenges faced by granite exporters in the USA markets are : (U01) lack of trust among buyers regarding Indian quality, (U02) uncertain global demand or economy, (U03) competition posed by other countries, (U04) payment defaults by the USA clients, (U05) recession in the USA has increased the problem of payment, (U06) among all other nations, payment defaults are mostly by U.S. importers, (U07) in case of defaults, U.S. policies are not supportive, (U08) Indian granite lacks the national image/branding in the international market, (U09) other competitor nations are able to provide brand image to their granite products, (U10) granite from India is rated inferior to other nations, (U11) lack of unity among Indian granite exporters, (U12) lack of government support, (U13) inadequate demand of Indian products in the international market, (U14) absence of any strong Indian forum to represent in the international market, and (U15) lack of clarity in government policies.

The significant challenges which Indian exporters face in the USA market have been found as U04 (payment defaults by the USA clients), U05 (recession in the USA has increased the problem of payment), U06 (among all

other nations, payment defaults are mostly by U.S. importers), U11 (lack of unity among Indian granite exporters), and U15 (lack of clarity in government policies).

## Implications

There is a paucity of academic studies in the area of granite business, highlighting challenges in the domestic market and the USA market. The findings and observations made in this study would help policy makers and researchers to be interested in the area of research involving the granite business environment. These findings can be used for making a comparison of the results in the future for changing business scenario. As of now, playing individually has created wrong externalities for Indian exporters. Their unity can make Indian representation better in the USA market and can help further build the image of our nation as trade-friendly.

The recession in the USA has increased the problem of payment. Owing to payment defaults by the USA clients, Indian exporters need to start identifying other markets as well in Africa, Latin America, and other emerging economies. This would help reducing dependencies from the USA market, in particular. Furthermore, the Indian exporters should pay more attention towards developing their granite business as a professionally and well-managed workplace (Lenartowicz & Johnson, 2007; Sweet, 2010). These businesses are managed as export oriented units of granite which are, in most cases, family-owned business houses lacking unity to compete in the international market. Moreover, there has to be clarity in Indian government policies pertaining to the exports of granite.

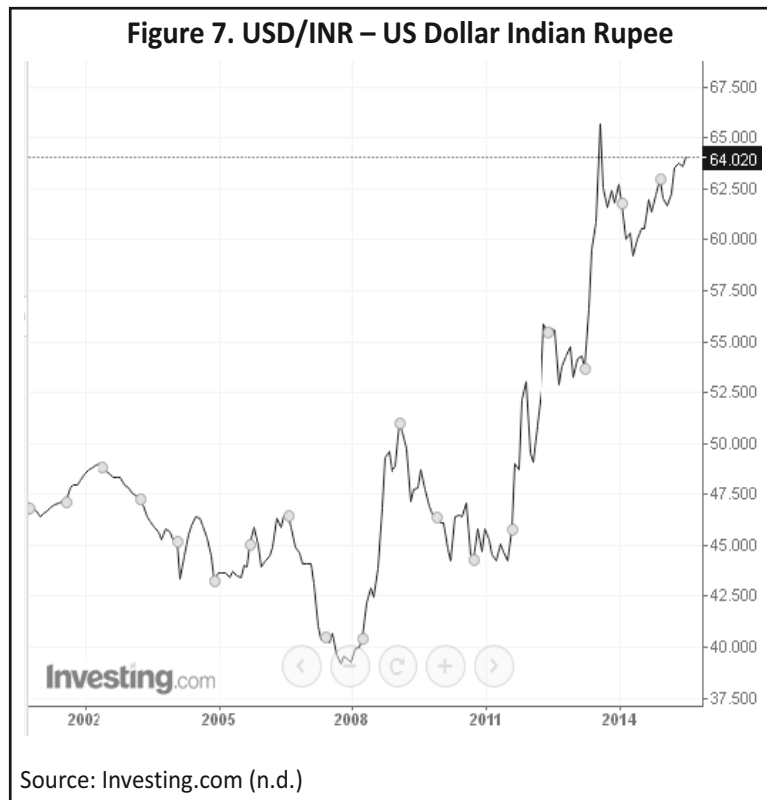
Granite falls under the purview of state jurisdiction as it is a minor mineral, because of which policies relating to granite business differs from one state to another, which speaks for the lack of clarity and frequent changes in government policies with respect to quarrying and obtaining a license for operating mining or factories. This adds to the problems of exporters as sourcing of raw material is in one state, while factories are located in another state. As granite is one of the main items of export under the mineral segment, it should be brought into the mainstream and be declared as a major mineral so as to improvise policies as well as bring clarity in terms of leasing, licensing, and mining of the same. For making adequate availability of raw granite, its export should be restricted, and import is to be made freely allowed in order to make value addition and re-export.

More emphasis should be given for developing and providing better infrastructure for the segment, and the policies of major competing nations like China and Brazil should be reviewed. This study would help exporters to understand major competitor nations to India like Brazil, China, Italy, and so on in strategizing actions for exporters to capture the global market more efficiently.

## Conclusion

The highly fragmented granite industry of India has a good image in the international market for price, quality, varieties, timely delivery, professionalism, reputation, and ease of doing business aspects. The country has emerged as one of the leading countries in production and export of granite. One of the most disturbing trends witnessed in the export of Indian granite in recent years is that China has emerged as the major importer of Indian rough granite for re-exports to the USA, which is the major importer of Indian granite.

Indian exporters face many challenges in both domestic and export markets. Inconsistent government policies and infrastructure issues related to mining create a situation of uncertainty for supply of domestic granite. Global uncertainty aggravates stiff competition from Brazil and China. Brazil is the biggest exporting nation, owing maximum varieties and reserves of granite. China buys raw granite from all over the world, finishes it, and sells it cheapest everywhere. Moreover, the biggest challenge of Indian exporters dealing with the USA has been found to be the default of payments. The study indicates that one of the major issues that Indian



exporters face in the U.S. market is of the U.S. buyers' tendency to default on payments. As granite export involves huge monetary transactions, payment defaults has emerged as a major challenge. Brazil has the major dominance in the USA market, and over a period of time, it has shown consistency over there.

This study has included only opinions of granite exporters from India confining only to states like Karnataka, Tamil Nadu, Telangana, Andhra Pradesh, Rajasthan, and Maharashtra. The study can be extended to analyze government policies extensively and suggest the needed reforms in this sector. The study can also be extended to explore other emerging markets for Indian granite. The granite resources in the country are very large, which can last for hundreds of years to meet demand. Future studies should focus on adoption of mining and processing techniques of granite to enable Indian granite to compete in the international markets, especially with countries like China, South Africa, Italy, Brazil, and Canada.

## Limitations of the Study and Scope for Further Research

This study is essentially a descriptive study about the Indian granite industry. The study covers only the opinion of the Indian granite exporters. It does not cover the opinion and perception of the granite importers about Indian granite. This study is only confined to the respondents from Hosur, Chennai, Hyderabad, Bangalore, Mumbai, and Jaipur. That is, the study was unable to cover the entire country.

Future research studies in this area should focus upon developing a mechanism to restrict supply of raw granite to competing nations like China as it creates a shortage of material in the domestic market and creates more competition at the international level. Future studies can also focus on adoption of mining and processing techniques of granite to enable Indian granite to compete in other international markets, especially with countries like South Africa, Italy, Brazil, and Canada.

## Acknowledgment

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## End Notes

At the time of independence, when India had no foreign borrowings, the rupee was at par with the dollar. With the introduction of the Five-Year Plans and the subsequent requirements for foreign investments, the dollar slowly rose. In 1985, after the Bofors scam, the dollar was equal to ₹ 12.35 , and since the economic liberalization in 1991, there was a sharp devaluation of rupee and the rupee dropped to ₹ 24.5 against a dollar. The dawn of the third millennium further worsened the condition of the rupee against dollar, and the rupee hit an all time low of ₹ 65.42 against a dollar on August 22, 2013 (see Figure 7). Indian economists are trying hard to chalk out a strategy to counterbalance the falling value of rupee, but it seems the attempts are futile owing to current account deficit and poor economic growth (Mitra, 2013).

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