

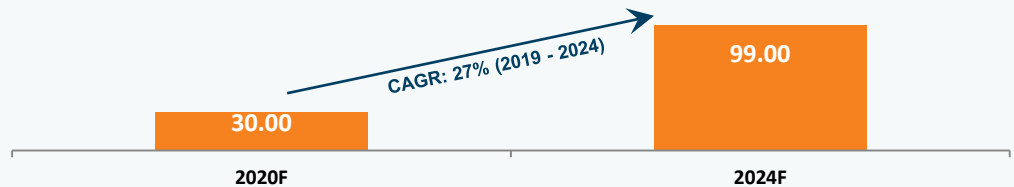


E-COMMERCE



MARKET SIZE

Gross Value Added By E-Commerce Sectors (US\$ billion)

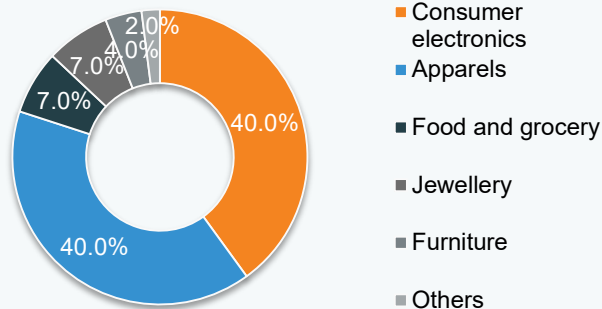


Trend point: The E-commerce market in India is expected to post a ~27% CAGR between 2019 and 2024.
Note: F – Forecast



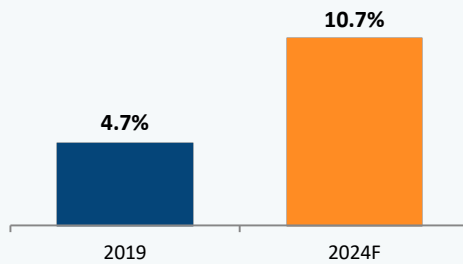
SECTOR COMPOSITION

Shares of Various Segments in e-commerce Retail by Value (2020)

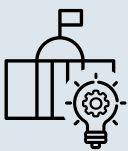
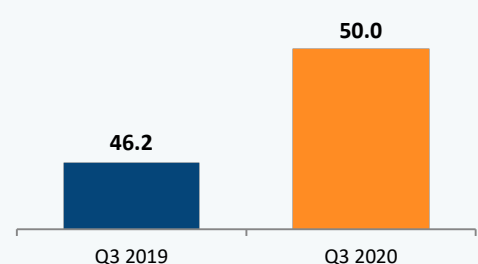


KEY TRENDS

Online Retail vs. Total Retail



India's Smartphone Shipments (million)



GOVERNMENT INITIATIVES

Government e-Market Place (GeM)

National Retail Policy

Consumer Protection Rules 2020



ADVANTAGE INDIA

- **Growing demand:** India's e-commerce order volume increased by 36% in the last quarter of 2020, with the personal care, beauty & wellness (PCB&W) segment being the largest beneficiary.
- **Increasing Investment:** The recent rise in digital literacy has led to an influx of investment in E-commerce firms, levelling the market for new players to set up their base, while churning out innovative patterns to disrupt old functioning.
- **Policy support:** 100% FDI is allowed in B2B e-commerce. As per the new guidelines on FDI in E-commerce, 100% FDI under automatic route is permitted in the marketplace model of E-commerce.
- **Attractive opportunities:** Despite depressed consumer spending, economic slowdown and uncertainty created due to COVID-19, e-commerce players are expecting strong sales growth in 2021. Online grocery, e-pharmacy and social commerce are expected to see a bulk of the action in 2021.