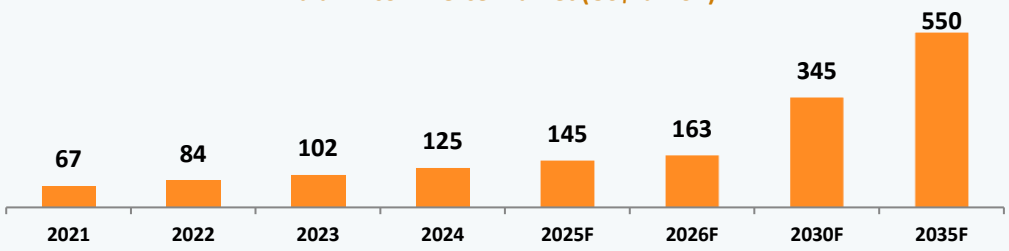
E-COMMERCE

MARKET SIZE

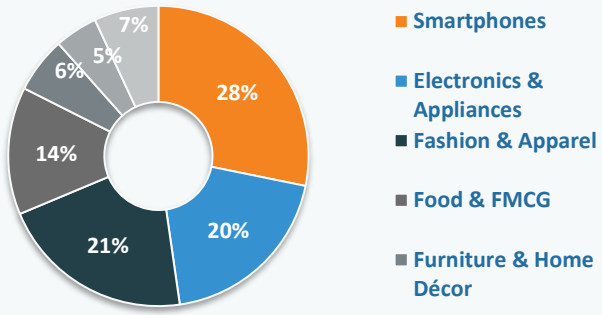
Indian E-commerce Market (US$ billion)



Note: F - Forecast

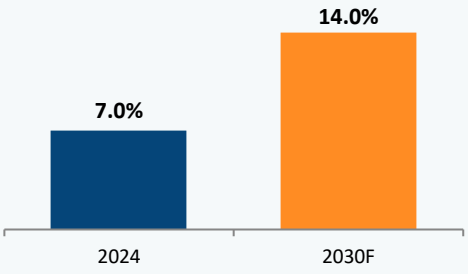
SECTOR COMPOSITION

Shares of Various Segments in e-commerce Retail (2024)

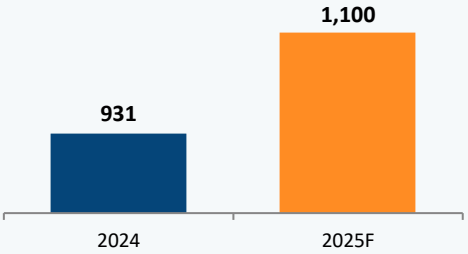


KEY TRENDS

Online Retail vs. Total Retail



India's Smartphone User Base (million)



GOVERNMENT INITIATIVES

- Government e-Market Place (GeM)
- National Retail Policy
- Consumer Protection Rules 2020

ADVANTAGE INDIA

- **Growing demand:** Online retail is projected to more than double from US$ 75-85 billion in 2025 to US$ 170-180 billion by 2030. In parallel, e-services including travel, dining, education, insurance, and online subscriptions are estimated to grow from US$ 45-55 billion to US$ 120-130 billion over the same period, indicating strong growth across both product and service segments. The Indian quick commerce (Q-commerce) market's gross order value is projected to nearly triple from Rs. 64,000 crore (US$ 7.57 billion) in FY25 to around Rs. 2 lakh crore (US$21.12 billion) by FY28, driven by evolving consumer preferences, hyperlocal infrastructure, and a 142% CAGR during FY22-FY25, according to CareEdge Advisory.
- **Increasing Investment:** In June 2026, Amazon plans to expand Amazon Now, its ultra-fast delivery service, to over 300 cities across India, as it builds the country's largest "delivery in minutes" network. Orders have doubled every quarter since launch, making Amazon Now the company's fastest-growing e-commerce business unit in India. On June 2026, Amazon announced plans to invest US$ 48 billion in India between 2026 and 2030, including an additional US$ 13 billion in AI and cloud infrastructure. The company aims to support 3.8 million jobs by 2030, enable US$ 80 billion in cumulative e-commerce exports, and expand its fulfilment and last-mile delivery network across the country.
- **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**. : India's e-commerce industry, valued at Rs. 10,82,875 crore (US$ 125 billion) in 2024, is projected to grow to Rs. 29,88,735 crore (US 345 billion) by 2030, reflecting a compound annual growth rate (CAGR) of 18.4%. The rapidly expanding Direct-to-Consumer (D2C) segment is driving growth, with India's D2C market projected to grow at a 40% CAGR, reaching US$ 60 billion by 2030. E-commerce in India is expected to surpass US$ 145 billion in 2025, powered by mobile commerce and AI-driven hyper-personalization enhancing customer experiences.

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