

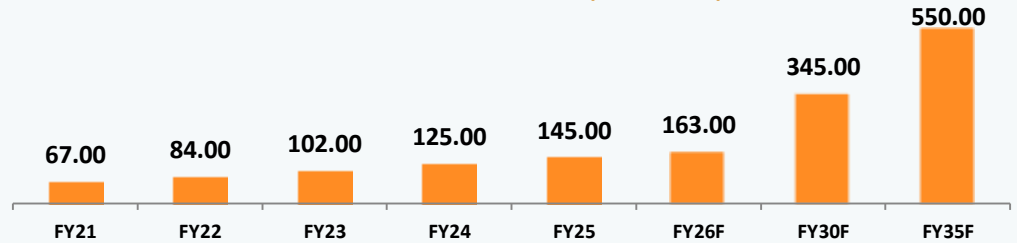


E-COMMERCE



MARKET SIZE

Indian E-commerce Market (US\$ billion)

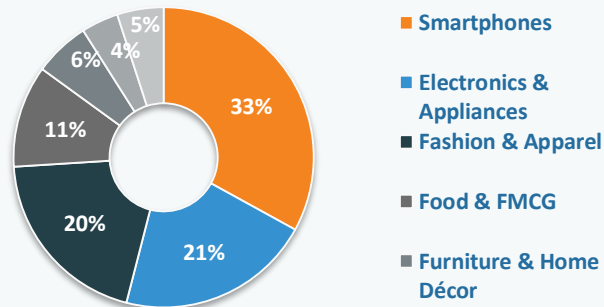


Note: F – Forecast



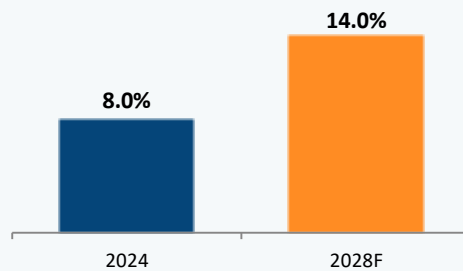
SECTOR COMPOSITION

Shares of Various Segments in e-commerce Retail (2022)

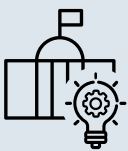
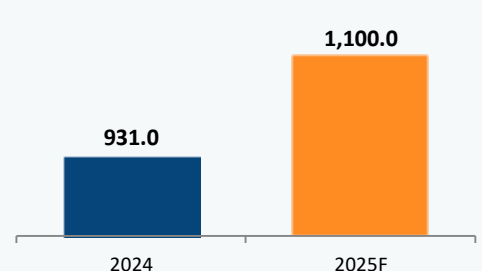


KEY TRENDS

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:** The Indian Beauty and Personal Care (BPC) market is experiencing rapid growth, projected to reach a GMV of Rs. 2,60,610 crore (US\$ 30 billion) by CY27. This represents 5% of the global beauty industry. The market is expanding at an annual growth rate of around 10%, making it the fastest-growing BPC market among major economies. Third-party logistics providers are anticipated to manage approximately 17 billion shipments within the next seven years. India's e-retail sector is poised for strong long-term growth, with Gross merchandise value (GMV) projected to rise over 18% annually to reach Rs. 14.5 lakh crore (US\$ 170 billion) by 2030.
- Increasing Investment:** The indigenous e-commerce giant Flipkart is poised to raise US\$ 1 billion in a new funding round, with its parent company Walmart anticipated to contribute US\$ 600 million. Google LLC is investing US\$ 350 million in Flipkart as part of a nearly US\$ 1 billion funding round led by Walmart Inc., Flipkart's majority stakeholder, with the investment aimed at expanding Flipkart's business and modernizing its digital infrastructure to serve customers across India, and the two companies also plan to increase Flipkart's use of Google's cloud platform.
- 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:** The Indian e-commerce market grew from Rs. 1,257,879 crore (US\$ 147.3 billion) in FY24 & is projected to grow to Rs. 3,106,191 crore (US\$363.3 billion) by 2030.