

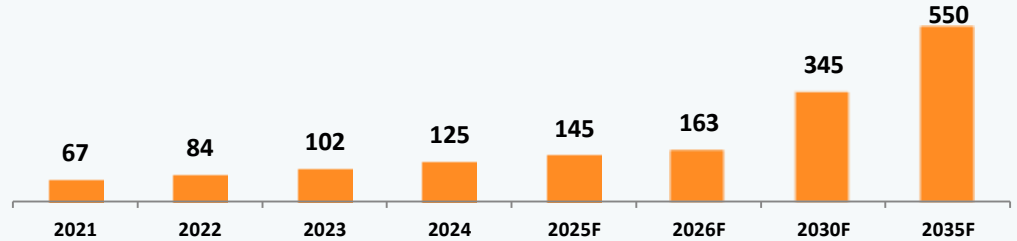


E-COMMERCE



MARKET SIZE

Indian E-commerce Market (US\$ billion)

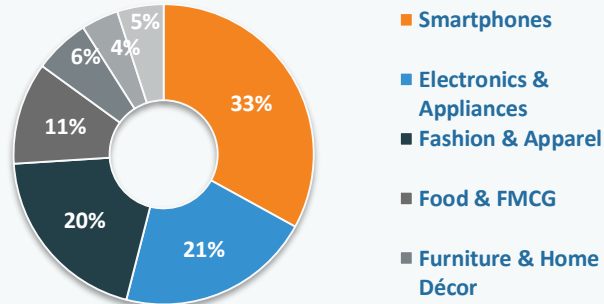


Note: F – Forecast



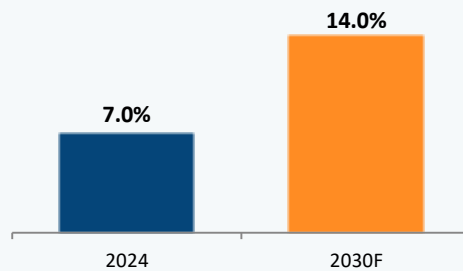
SECTOR COMPOSITION

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

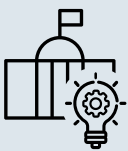
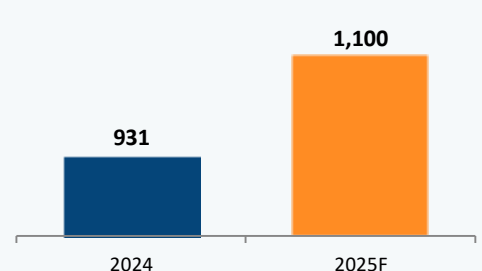


KEY TRENDS

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:** Amazon CEO Mr. Andy Jassy announced that the company is committed to invest US\$ 26 billion in India by 2030, out of which US\$ 11 billion has already been invested as of July 2025. In June 2025, Nestle India announced plans to invest Rs. 5,000 crore (US\$ 585 million) in capacity expansion, new product lines, and sustainability across its factories.
- 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 15%.